

Oracle Public Sector Permitting and Licensing

**Using Community Development
Code Enforcement**

24C



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24C

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Get Help

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

Get Help in the Applications

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

Get Support

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

Get Training

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

Join Our Community

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

Learn About Accessibility

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

Share Your Feedback

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

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

Thanks for helping us improve our user assistance!

2 Managing Public Users

The Public User Registration Process

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

When a public user is not signed in, clicking the account avatar in the global header on the anonymous user landing page opens a menu that includes options for registering and signing in.

Here is a summary of the registration process:

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

To sign in again in the future, the account holder clicks the account avatar in the landing page header and selects the **Sign In** menu item.

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

Entering Account Details

Here's how to create a new account on the Register page:

Page Element	Description
Hide contact information from public view	<p>Turn on the switch to hide the registrant's name and contact information when a member of the public views their applications.</p> <p>This switch appears only if enabled by the agency on the Public User Setup page.</p> <p>The default answer to this question is <i>No</i>. Contact information can by default be viewed by the public.</p> <p>Note: Even when the registrant's own information is hidden, the property addresses for all applications are visible to the public.</p>

Page Element	Description
First Name and Last Name	Enter the registrant's name, which will appear on the account profile created by the registration process.
Email Address and Confirm Email Address	<p>Enter an email address that will be associated with the registrant's account. Enter the email address again to confirm.</p> <p>Note: The registrant's email address is their user name or user ID. There is no separate user name or user ID to sign in.</p> <p>After the registrant submits registration information, the system sends an email to this address. The email contains a link that they need to complete the registration process.</p>
Phone	Enter the phone number and extension, if any. The country displays <i>US</i> for the United States, and the code field displays <i>+1</i> (one) for the United States prefix.
Address	<p>The country or region is currently displayed is <i>United States</i>. Enter the address information:</p> <ul style="list-style-type: none"> Address Line 1 and Address Line 2: The first and second lines of the street address. City, State, and Postal Code
IVR access code (interactive voice response access code)	<p>Add a 4-digit PIN that is required when public users accessing inspections for applications using the agency's interactive voice response (IVR) system.</p> <p>The code is masked on this page, and you can't see this code again even after registration is complete. Users who forget their code can reset it on the account management page. For information about entering a new code after registering, see Managing Public User Accounts.</p> <p>This field appears only if the agency has enabled IVR access codes on the Public User Setup page. See Setting Up Public Users.</p> <p>When you enable the IVR Access Code field, help information indicates that you can access permit and business license information and manage your inspection schedule by phone, but you need this 4-digit access code each time. If you forget the code, you can reset it on the account management page.</p>
Business Name and Business Title	Enter the business name and business title for the registrant. These fields are optional.

After entering information and agreeing to the terms and conditions, if required, click the **Register** button. The **Register** button is only available after you've accepted the terms and conditions.

Agreeing to Terms and Conditions

The Public User Setup page specifies whether public users must agree to terms and conditions. If registrants must agree, the setup page also specifies the Terms of Use definition to use during registration, and public users must accept the terms and conditions during the registration process.

When the terms of use are required, the description from the Terms of Use definition appears as a link on the Register page. Instructional text directs the user to read and accept the terms before proceeding.

To view and accept the terms, the registrant clicks the terms of use link to open the terms of use drawer of the same name, which is determined by the agency. The drawer displays the complete text of the terms including a check box that indicates **I have read and accepted the terms and conditions**. The registrant must select the check box and click the **Continue** button close the drawer and continue the registration process.

After the registrant accepts the terms and continues, the **Register** button on the information entry page is active. The link to the terms of use drawer is still available.

Note: If the terms of use change, account holders who have already registered are required to accept the new terms. When an account holder attempts to sign in after terms have changed, a window with the new terms opens, and the user must select the agreement check box to continue. This occurs if a new effective-dated Terms of Use definition goes into effect, either because the agency changed the terms of use definition on the Public User Setup page, or because the definition in use has a new effective date that is after the date when the account holder most recently signed in.

Completing Registration by Resetting the Password

When the public user clicks the **Register** button, a confirmation page provides instructions for completing the registration process. The instructions direct the user to check the confirmation email. The user must click the password reset link in the confirmation email to complete the account setup.

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

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

1. The system creates user account information in the Oracle Permitting and Licensing system and in the Fusion Applications system.
2. The system emails the user a link for completing the registration process.
3. The link takes the user to the Reset Password page in the Oracle Applications Cloud.
Although the page name suggests that the user is resetting a password, the user is actually creating a password for the first time.
4. The user enters a password and confirms it, then clicks the **Submit** button.
5. The system creates the password, completing the registration process.
6. The user signs into the Oracle Permitting and Licensing landing page for registered public users to access their account.

Accessing Public User Account Information

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

Security Details for Managing Public User Accounts

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

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

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

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).

Account Management Navigation for Agency Staff

Agency staff accesses the Manage Account page using these steps:

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

The Public User Access page displays summary information about public user accounts. The list includes information such as the person's name, email address, and whether the account is active.

A condition link (such as Lock, Hold, or Notice) indicates that the account is subject to one or more conditions. Conditions on an account may prevent certain actions or issue warnings when the actions are attempted. To see the condition summary, click the condition link. For example, click the **Lock** link to view details about the applied condition or conditions. For more information, see [Managing Account Conditions](#).

2. Search for the desired user account.
3. Click the row for the desired user account to open the Manage User Account page.

For more information, see [Managing Public User Accounts](#).

4. Click the **Add (+)** button to open the Register page for creating a new account.

For more information, see [The Public User Registration Process](#).

Account Management Navigation for Registered Public Users

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

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

A drop-down menu appears.

3. Select **Manage Account**.

For more information, see [Managing Public User Accounts](#).

Managing Public User Accounts

A registrant's account information can be updated using account management functionality. The Manage Account page is available to both public users, who can manage their own accounts, and agency staff, who can manage information for any public user.

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

For the most part, public users and agency staff have access to the same account management options. These are the exceptions:

- If account attachments are enabled, public users can't delete attachments unless you configure the Public User Setup page to allow this action. Agency staff can always delete attachments.
- Only agency staff can apply and manage account conditions. Conditions are account restrictions. Both public users and agency staff can see active conditions that have been applied to the account.

Note: Agency staff don't have access to user passwords; they aren't part of account management.

Managing General Account Information

Registered users log in with the email address used during the registration process. They click the account avatar with their initials in the global header and select the **Manage Account** menu item. Agency staff access the Manage Account page by selecting a registered user on the Public User Access page.

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

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

1. On the Manage Account page, you can add or delete general account information.

Here's how to add or update information.

Page Element	Description
Name	<p>Click the Name details pencil button to open the Name details drawer.</p> <p>Update fields including first, middle, and last names, initials, suffix, and title. The Display Name is generated from the name fields.</p> <p>Turn on the Hide contact information from public view switch to hide the registrant's name and contact information when a member of the public views the registrant's applications. This switch appears only if enabled by the agency on the Public User Setup page.</p>
Access	<p>Click the Access details pencil icon to open the Access details drawer.</p>

Page Element	Description
	Enter a number in the IVR access code field. The User Name and Email fields are display-only and reflect the email address entered during the registration process.
Business information	<p>Click the Business information details pencil icon to open the Business information details drawer.</p> <p>Enter a business name and business title.</p>
Address	Click the Add Address button to enter a home or business address. Turn on the Default switch to designate the address as the default selection.
Phone	Click the Add Phone button to enter a home, mobile, or work phone number. Turn on the Default switch to designate the phone number as the default selection.
Email	Click the Add Email button to enter a home or work email address. Turn on the Default switch to designate the email address as the default selection.
Contacts	<p>Contacts are people who can interact with the agency regarding business related to the associated account.</p> <p>Click the Add Contact button to enter information for an account contact, including name, business, email, street address, and phone.</p> <p>Note: When applicants enter contact information in an application, they can create new contacts or choose existing account contacts. When creating a new application contact, the user can indicate whether the new contact should also be added to the account. When choosing an existing account contact, the applicant can modify contact details and indicate whether the original account contact information should be updated as well.</p> <p>For more information, see Working with Application Contacts.</p>
Conditions	<p>View conditions that have been applied to the person with the associated account. Only agency staff can apply and resolve conditions.</p> <p>For information about adding and managing conditions, see Managing Account Conditions.</p>
Attachments	<p>View and upload files as attachments to the account.</p> <p>Your agency controls whether attachments can be added to accounts on the Public User Setup page.</p>

Page Element	Description
	For information about adding and managing attachments, see <i>Working with Attachments</i> .
Terms of use	Click the terms of use link to review the terms and conditions that the registrant accepted. For more information, see <i>Setting Up Terms of Use</i> .

2. To delete an item, click the **Delete** trash can icon.

3 Using Common Interface Pages and Elements

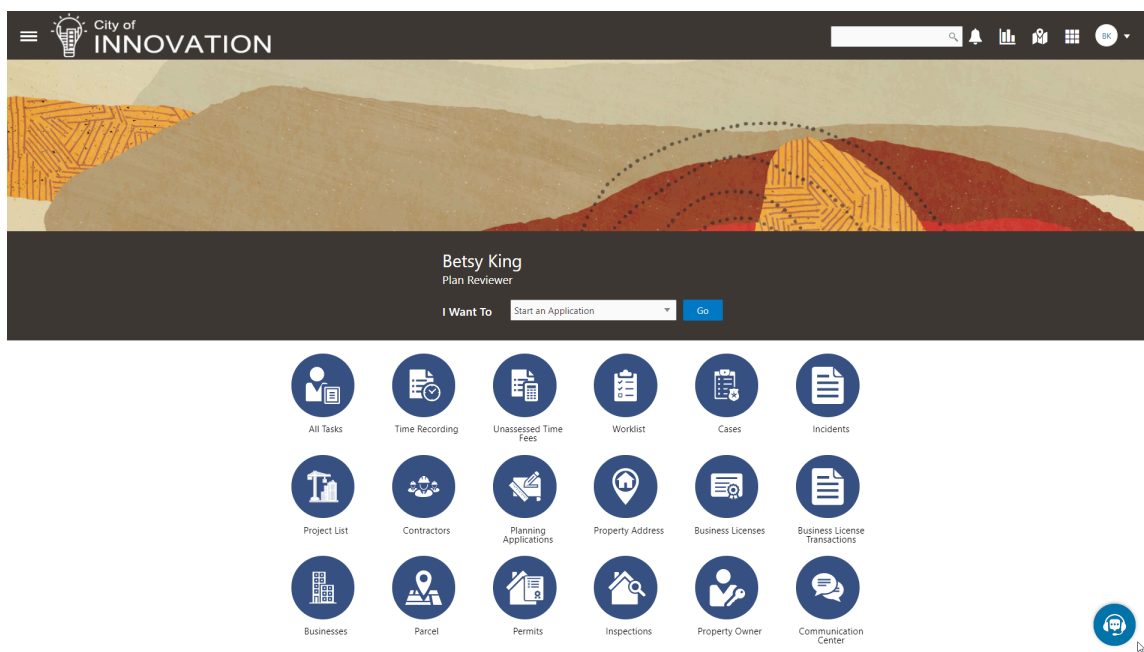
Using the Agency Springboard

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

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

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

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









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



Global Header

The global header appears:

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

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

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

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

Alerts

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

Quick Actions (I Want To)

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

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

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

Tiles

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

Viewing Tasks in the Worklist

The worklist enables agency users to view a list of just the workflow tasks assigned to them.

The tabs displayed in the worklist depend on the agency user's role. For example, a plan reviewer will see the Plan Reviews tabs with their assigned plan reviews, and an inspector will see the Inspections tabs with their assigned inspections for permits, planning applications, business licenses, and so on. Common tabs include Incoming Tasks and My Tasks.

1. On the agency springboard, select the **Worklist** tile.

If you're a code technician using the Code Enforcement offering, click the **Code Technician Worklist** tile. If you're a planner using the Planning and Zoning offering, click the **Planner Worklist**.

2. On the Worklist, select the tab that lists the tasks that you want to review.
3. Click a task in the list to open the transaction details.

Clicking the **View More Details** button for a task on the Incoming Tasks and My Tasks tabs takes you to the Workflow page in the transaction details, where you can manually advance the workflow. For more information, see [Using Workflow](#).

Note: While most of the information displayed on the worklist is common to all offerings, certain offerings such as Business Licenses, display unique data for an business inspection, such as the **Doing Business As** column.

For information about the common elements found on worklists, see [Using Grids](#).

Using Grids

Common grid controls in Oracle Permitting and Licensing enable public and agency users to perform actions and manage how they display data. Using the controls on grids, you can search, sort, filter, and export data, change views, and more. Some grids may be displayed in an expanded format depending on your agency's implementation.

You'll see common grid controls on a variety of pages, including worklists and pages that list records, such as business license transactions, incidents, cases, contractors, inspections, parcels, permit and planning transactions, and plan reviews. Transaction detail pages in the different offerings, such as the Inspection List and Fees and Payments pages in the permit application details, also provide common grid controls.











Depending on your agency's implementation, grids may be displayed in a condensed or expanded format. These grid formats determine which controls are available:




- *Condensed* – Displays multiple data elements in a single column. This is the default format for public users.
- *Expanded* – Displays only one data element per column and provides user-level personalization options. This format and personalization options are only for agency staff.

For more information about personalizing expanded grids, see [Personalizing Grid Displays](#).

Common Grid Controls

The grid controls shown here are available on both condensed and expanded grids, unless indicated in the usage.

Control	Usage
	Click to download the list of records in a CSV file format. The downloaded file displays all visible fields in separate columns.
	Click to view check boxes for selecting multiple rows before performing an action.
 Show All Statuses  Show All Cycles	Some grids may have additional options available to control data displayed in a grid. For example, the Show All Statuses switch is available on the Transactions page and the Show All Cycles switch is available on the Plan Reviews page.
<input type="text" value="Search"/> 	Search by alphanumeric characters on the fields that are displayed on the page. All visible fields in the grid are searchable. When you search on dates, use this format: MM/DD/YYYY.
	Click the filter button to open the filter options, where you can define, modify, and save your own filters. The Filter By panel opens and you can select from the various advanced filter options to refine your search. All visible fields in the grid can be filtered. See the "Using the Advanced Filter" section in this topic for more information about the Filter By panel.
	Click the List View button to view the records in a list.
	Click the Sort button, available only in the list view in the condensed grid format, to select the field by which you want to sort the rows. The available sort fields depend on the fields in the grid. When you first select a field to sort, the sorted rows appear in ascending order. To view sorted rows in descending order, click the sort icon next to the selected field again. Click the sort icon again to return to the original sort order. In the condensed grid format, the sort appears on each column.
	Click the Grid View button to view the records in a grid.
<input type="text" value="Permit Type"/> 	Click the arrow icon on columns in grid view to sort alphanumerically by fields displayed in the column. If the column displays only one field, click the arrow icon to sort based on the field value. If the column displays multiple fields, click the arrow icon in the column heading to show a list of fields that are sortable, then select the field you want to sort by.

Control	Usage
	<p>The initial sort displays records in ascending order. Select the same sort again to show records in descending order, and once again to return to the original order.</p> <p>The location or property information column also uses sorting logic that accounts for the street name followed by the street number.</p>
	<p>View the inventory of records on an interactive map.</p> <p>The map view includes a left frame with a list of items and a right frame with a map that has markers to show the locations of the items on the list. You can click a list item to zoom to its marker on the map.</p> <p>The search and filter options in the map view are the same options that you have in the list and grid views.</p> <p>See Viewing Map Markers.</p>
	<p>Click to select the applicable actions for each row.</p>
	<p>Click to view more details about the object in the row. When this button isn't available, you can click the row to open the details page.</p>

Personalizing Grid Displays

Agency staff can personalize expanded grids to suit their own preferences for working more effectively.

The display settings enable each user to:

- Search columns by name
- Wrap text in columns
- Freeze specific columns
- Show or hide columns
- Rearrange column order
- Reset to the default settings

You can only personalize the display on expanded grids. Once you make the changes, your settings are saved on the page. You can adjust the column width in both condensed and expanded grids, but the changes are only saved on expanded grids.

For more information about expanded and condensed grid formats and controls, see [Using Grids](#).

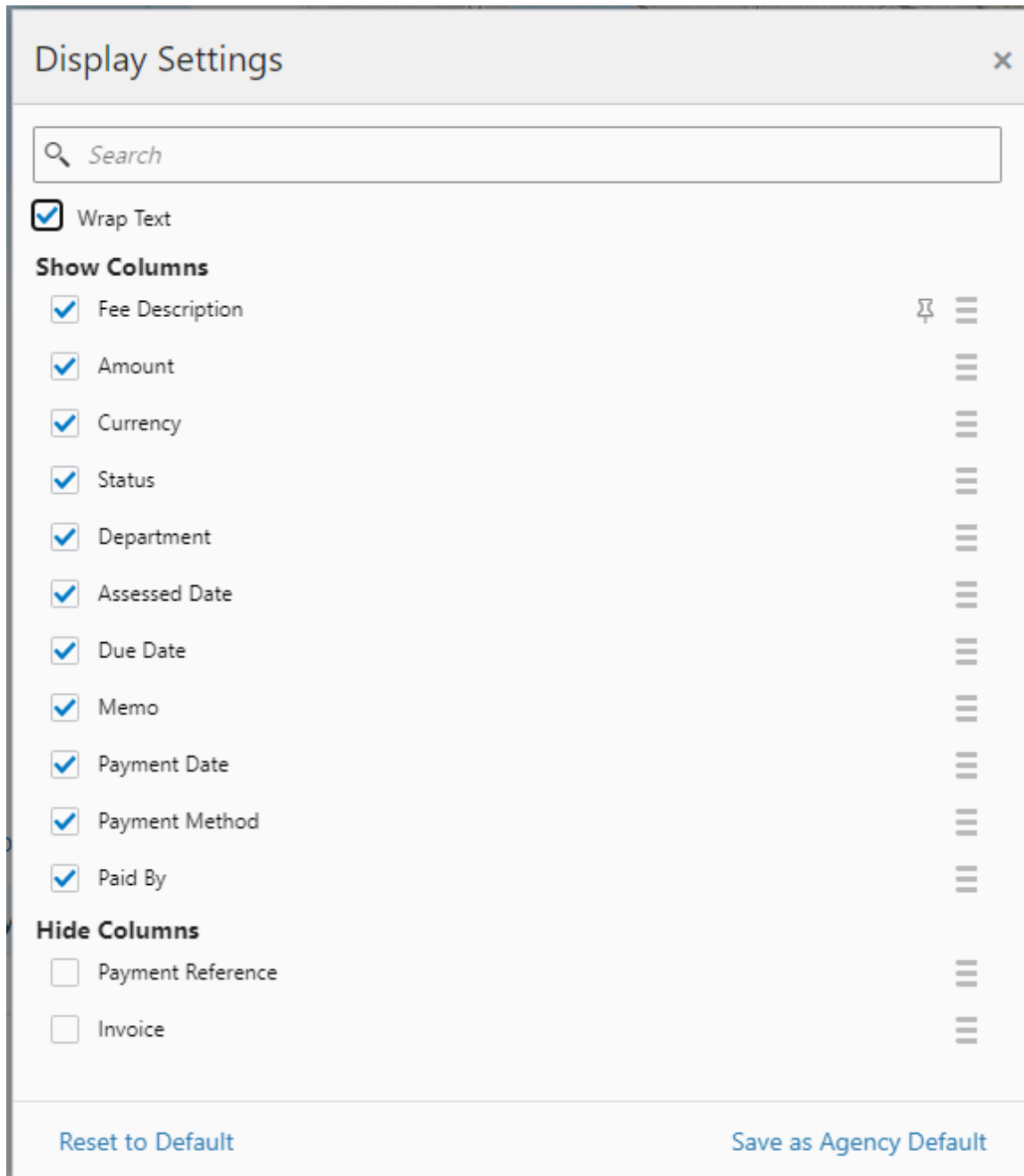
To personalize an expanded grid:

1.

Click the **Display Settings** button above the grid:  .




2. The Display Settings modal page opens.

Example of the Display Settings modal page



The column names appear in a list, where the top-to-bottom sequence represents the left-to-right display in the grid. For example, the first three column names listed under **Show Columns** will appear as the first three columns on the left in the grid.

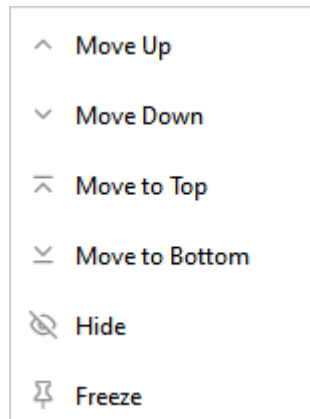
3. Adjust the available display settings.

Page Element	Description
<p>Search</p>	<p>Enter text in the search field to search the columns by name.</p>
<p>Wrap Text</p>	<p>Select the check box to wrap the text in the columns.</p>
<p>Show Columns and Hide Columns</p>	<p>Select the check box for a column name to show the column in the grid. When you deselect the check box, the column name row moves into the Hide Columns section.</p>
<p> (Unfreeze) and  (Freeze)</p>	<p>Click the pin icon to unfreeze or freeze a column. When you freeze a column, it's displayed to the left of columns that aren't frozen.</p>
<p></p>	<p>Click the icon in the column name row, move the row to a new position, and release.</p>
<p>Reset to Default</p>	<p>Agency Staff: Click to restore the agency default settings, as set by your administrator. If there is no default set up by your agency, then clicking this button will reset to Oracle delivered settings.</p> <p>Administrators: Click to revert to the previously set agency default display. If there is no default set up by administrators, then clicking this button will reset to Oracle delivered settings.</p> <p>Note: This option is available only for administrators with the job role PSC_MANAGE_COMMONSETUP_PRIV, and applies for the current offering alone.</p>
<p>Set as Agency Default</p>	<p>Click to save the settings as the default display for your agency staff.</p> <p>Administrators need to perform this action for each page that has the agency default personalization setup option.</p> <p>Note: This option is available only for administrators with the job role PSC_MANAGE_COMMONSETUP_PRIV, and applies for the current offering alone.</p>

Page Element	Description
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You can also right-click a column name row to open a menu with row-level actions.

Row-level actions menu on the Display Settings page



Select an action to move, hide, or freeze a column.

4. Click the **Close** button.

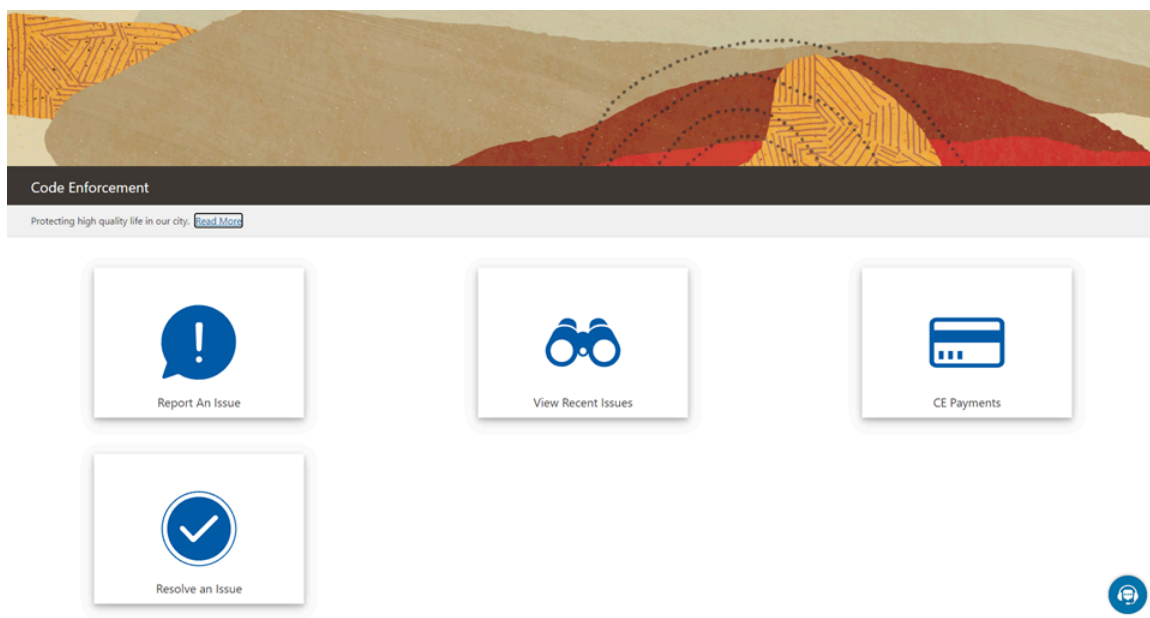
Your display changes are immediately reflected in the grid and saved.

4 Code Enforcement Activities for Public Users

The Public User Landing Page for Code Enforcement

The public user landing page for code enforcement is the entry point for public users who want to report an issue, track issues that they reported, see recent issues in the agency’s jurisdiction, or pay a citation.

This example illustrates the public user landing page for code enforcement. In this example, a registered public user has signed in.



The banner at the top of the page includes a title and a short message. After the message, a Read More link gives public users access to additional information that you set up.

For information on configuring these elements of the welcome banner, see *Setting Up Agency-Level Options for Code Enforcement*.

On the landing page, public users have access to these actions:

Tile or Button	Who Can Use	Description
Report an Issue	Anonymous and registered users.	Report an issue to the agency. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured. See <i>Reporting Issues</i> .

Tile or Button	Who Can Use	Description
Track Issues	Registered users. This button is visible only after the user signs in.	View status and other information about issues that the user reported while signed in. A user who reports an issue without signing in can't track the issue. See <i>Tracking Issues</i> .
View Recent Issues	Anonymous and registered users.	View a map with markers that identify the locations of recent issues, or view a searchable list of the issues. See <i>Viewing Recent Issues</i> .
CE Payments	Registered users. Anonymous users are prompted to sign in before continuing.	Make an online payment for a code enforcement fees. See <i>Making Code Enforcement Payments</i> .
Resolve an Issue	Registered users. Anonymous users are prompted to sign in before continuing.	Claim responsibility for an issue, and perform actions such as viewing notices or appealing a citation. See <i>Resolving Issues</i> .

Reporting Issues

When reporting an issue, a public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured.

Note: Agency staff can also report issues. To do this, go to the agency springboard and select *Report an Issue* in the **Want To** field, then click **Go**.

Note: The following topic details the functionality that is applicable to the Next Generation Flow. For the steps to enable the flow, see *What's New*—Update 24A for Oracle Permitting and Licensing. To view the documentation for the Classic Flow, which is enabled by default, see the Update 23D documentation—*Reporting Issues*.

Here is a summary of the issue reporting process:

1. On the public user landing page, the user clicks the **Report an Issue** tile.

The Select an Issue Type page appears. For the public user, this page lists the agency's issue subtypes and a description to provide details. For the agency user, the list displays only the issue types and subtypes linked to the issue types, and not the description.

2. The user can search for an issue type or select one from the list.

Note: If your agency's configuration does not allow users to report incidents anonymously, the user is prompted to sign in before continuing to the remaining steps.

After this point, the user navigates through the remaining steps using **Next** and **Previous** buttons. The user can't go back to choose a different issue type or subtype. If the issue wasn't properly classified, the user needs to cancel the report and start again. If an improperly classified report is submitted, agency staff can still assign a new issue type and subtype.

3. On the **Provide the Location of the Issue** step, the user identifies the location using a searchable map.
 - o A crosshairs icon on the map shows the selected location. If location sharing is active, the user's current location appears by default.
 - o The user can search for an address or location, and the map adjusts to place the specified location in the crosshairs.
 - o The user can pan and zoom the map to more precisely identify the issue location, and the search bar automatically displays the address or the coordinates of the location in the map crosshairs.

Sometimes the location on the map is identified using a range such as 100-120 Main Street. The user can update the address manually if necessary.

- o The user can additionally enter additional details about the location such as an apartment number or directions to a specific location at an address.

This information is optional if there is an address or location coordinates. When there is no address or location coordinates, additional address details are required.

- o If the location is outside of the agency's boundary, a message instructs the user to change the location to one inside the agency's limits.

The user will not be able to submit an issue with a location that is outside the agency's boundary.

Click the **Next** button to navigate to the next page.

4. On the **Tell Us What is Going On** step, the user describes the issue and optionally attaches photos, videos, audio files, or other attachments.
5. On the **Just a Few More Questions** step, the user answers any additional questions defined by the agency.

This step includes a **Does this issue pose a health hazard or public safety risk?** switch to indicate the urgency of the issue. Agencies can add additional questions as well.

6. On the **Provide Contact Information** step, the user verifies their name, email, and phone information or chooses to hide this information.

Default contact information comes from the user's account. The user can keep these values, modify them, or turn on the **Hide My Contact Information** switch. Regardless of whether the user hides the information from agency staff, the information is never visible to the public.

Note: If the agency configures the system to require contact information from the person reporting the issue, the **Hide My Contact Information** switch is hidden and contact information is required. For information about this configuration option, see [Setting Up Agency-Level Options for Code Enforcement](#).

7. On the read-only **Review** step, the user reviews all of the issue information. To make changes, the user can click the **Edit** button to make the Review page editable or use the **Previous** icon to return to earlier pages.

Note: The user can't change the issue type or subtype after continuing past those steps.

8. The user clicks **Submit**.
9. A confirmation message with the issue number appears.

Note: The collapsible option isn't supported in the Redwood UI. Group boxes appearing in the Redwood UI intake forms can't be collapsed.

Tracking Issues

Public users can view a list of issues that they reported, and they can see status and other information about the issue.

Note: Although public users see the term *issues*, the underlying objects are incidents. Even if a case is created based on the incident, the case does not appear in the list of the user's own issues.

Note: The following topic details the functionality that is applicable to the Next Generation Flow. For the steps to enable the flow, see [What's New—Update 24A for Oracle Permitting and Licensing](#). To view the documentation for the Classic Flow, which is enabled by default, see the Update 23D documentation—[Tracking Issues](#).

To view a list of issues that they reported, public users follow these steps:

1. The user clicks the **Track Your Issues** button on the code enforcement landing page. This button is visible only after the user signs in. The Issues page appears.
2. The user reviews the following information for the issues on the list:

Page Element	Description
Incident Id	Displays the incident ID. The incident type and subtype appear in the second row.
Address	Displays the address for the issue.
Description	Displays the original issue description that was supplied by the person who reported the incident.
Status	Displays the incident status. These are the possible incident statuses: <ul style="list-style-type: none">○ Reported○ Inspection

Page Element	Description
	<ul style="list-style-type: none"> ○ Compliance ○ Violation ○ Closed ○ Duplicate ○ Void <p>When an incident results in a notice of violation and the creation of a case, the incident status is based on the case status. So even though the public users do not have direct access to case data, the incident status conveys information about the overall status of the issue.</p> <p>Note that incident statuses are less granular than case statuses. For example, if an incident is in <i>Violation</i> status, the corresponding case could be in any of several statuses such as <i>Violation</i>, <i>Mandatory Abatement</i>, or <i>Citation</i>.</p>
Attachments	Displays an attachment icon. Clicking the icon opens a window with a carousel view of any photos, videos, or other attachments that were uploaded as part of the original issue report.
Submit Date	Displays the date that the issue was originally submitted.

3. To view details for a specific issue, the user clicks the issue to access the issue details page.

The issue details page has these sections:

- A header that displays the incident ID, the issue type and subtype, and the incident status.

If the incident was reported with the wrong issue type and subtype, and agency staff corrected this information and rerouted the issue, then the original issue gets closed and replaced by a new correctly classified issue. In this situation, the header also displays the message *Rerouted to issue <new incident ID>*.

The public user doesn't have access to the new incident, which was created by the staff member who rerouted the original incident.

- Click the address link to open the location map in a drawer.
- A Details section that shows the issue address, description, and whether the issue was reported as posing a health hazard or public safety risk.

If the person who reported the issue supplied their name, email, and phone, then that information also appears.

- An Attachments section that displays a carousel view of any photos, videos, or other attachments that were uploaded as part of the original issue report.
- A Status History section that displays the incident's status history. This section lists the current and previous statuses, along with the date that the status was applied and, if applicable, the reason for the status change.

4. To return to the issues list, the user clicks the **Back** icon in the header.

Viewing Recent Issues

Any public user, including anonymous users, can view your agency's recent issues using the View Recent Issues tile on the code enforcement landing page. Users can view the issues on a map or in a list. Your agency defines which issues appear on the map.

Overview of Recent Issues

The recent issues that are visible to the public are cases, which represent verified violations. Incidents are not visible to the general public.

To define which cases appear on the View Recent Issues page, agencies use the Code Enforcement Options page to define the period that is considered "recent." They also choose whether to show all cases that were reported within that time period or only cases that are still active.

Viewing Recent Issues

To view recent issues, public users follow these steps:

1. On the code enforcement landing page, the public user clicks the **View Recent Issues** tile.

The View Recent Issues page appears in map view.

2. The user can employ the search, zoom, and pan functionality of the map to show a specific area.

An address search bar appears in one corner of the map. This search centers the map on the specified location and shows markers for all issues in the display area.

A case number search field appears above the map. This search shows issue markers for any cases that match the search criteria and hides all other markers. Note that users cannot search using an incident ID, only a case ID.

3. Review the issues markers on the map.

Colored markers identify issue locations. A number on a marker represents the number of issues for that specific location. Markers without numbers have just one issue.

When the zoom level would normally cause location markers to overlap, the markers for the individual locations are combined into a cluster marker. Clusters appear as double circles, with a dark center and a lighter border. The number on the cluster marker represents the total number of issues for the included locations. As the user zooms in closer, individual location markers replace the cluster marker.

For more information, see [Viewing Map Markers](#).

4. To view issue details, the user clicks an issue marker to open a pop-up panel with more information:

- o The issue ID (case ID) and the status appear in bold.
- o The issue description, reported date, and location also appear.
- o If the location has multiple issues, the user can see how many issues exist and which one is currently visible—for example, *1 of 3*. **Previous** and **Next** controls enable the user to page through the issues.
- o A **Zoom To** link zooms the map while keeping the issue centered.

5. To toggle between the map view and a list view, the user clicks the **List View** and **Map View** icons.

The list displays the same information about each issue. It additionally displays the issue type and subtype.

Making Code Enforcement Payments

The code enforcement landing page for public users includes an option for paying fees associated with a case or citation.

The person paying the citation must be a registered user. For information on user registration, see [The Public User Registration Process](#).

Note: The following topic details the functionality that is applicable to the Next Generation Flow. For the steps to enable the flow, see [What's New—Update 24A](#) for Oracle Permitting and Licensing. To view the documentation for the Classic Flow, which is enabled by default, see the Update 23D documentation—[Making Code Enforcement Payments](#).

Paying Fees for Case or Citation

To pay fees associated with case, a public user follows these steps:

1. On the code enforcement landing page, the user clicks the **CE Payments** tile.
2. The user signs in if prompted.
3. On the Code Enforcement Payments page the user selects one of the options to pay:
 - o Case
 - o Citation
4. The user enters the ID of the case or citation and clicks the **Search** button.
5. The page shows the total amount due. The user clicks the **Pay** button.

Note: You can't pay for items in progress or with no balance.

6. On the **Checkout** page, the user selects a payment method and follows the instructions to complete the payment.
7. Once the payment is successful, a confirmation message appears. The fee details are updated in the Fees and Payments page in the case details. Agency staff can view the updated fee details in the Fees and Payments page from the case details. See [Working with Code Enforcement Fees and Payments](#).

Resolving Issues

Registered public users can access their cases online to address code violations for which they are responsible. Users request access from the Resolve Issue page, view a summary of their cases, and initiate actions such as an appeal.

Tip: Users can request online access and manage their cases on a phone as well as on a laptop or desktop computer. The layout changes based on the device being used.

Note: The following topic details the functionality that is applicable to the Next Generation Flow. For the steps to enable the flow, see *What's New*—Update 24A for Oracle Permitting and Licensing. To view the documentation for the Classic Flow, which is enabled by default, see the Update 23D documentation—*Resolving Issues*.

Requesting Access

Registered public users use the case ID and access number provided by the code enforcement agency to submit a request for accessing their case online. Once the agency approves the request, the case is listed in the Resolve Issue page.

Here are the steps for a registered public user to request online access to a case:

1. On the registered public user landing page, the user clicks the **Resolve an Issue** tile.
If there are no cases available for online access, the Request Access to Your Case page is displayed.
2. On the My Cases page, the user clicks the **Request Access** button.
3. On the Request Access to Your Case page, the user enters values provided by the agency in the following fields:

Page Element	Description
Case ID	Enter the identifier of the case as displayed in the notice.
Access Number	Enter the unique number associated to the specific case, provided by the agency.
Email	Enter your email ID.
Contact Type	Select the type of contact from the options.
Phone	Enter the phone number in the format set up.
Extension	Enter the extension number for the phone.
Additional Information	Enter any detail, such as a reason for requesting access to the case.

4. The user clicks the **Submit** button.

Agency staff such as a code technician receive the request, review, and decide to issue access or deny the request. For information on reviewing and taking action on access requests, see *Using the Code Technician Worklist* and *Adding Responsible Parties*.

Note: Agency staff decide the type of access they should issue to the requestor. Access types determine the level of control the registered users have on their cases.

Viewing and Resolving Issues

After the agency staff approve the access request, registered users can view their case on the My Cases page.

On the My Cases page, users get a snapshot of the information regarding the cases to which they have online access. Actions such as viewing the notice document and requesting an appeal can also be performed from this page.

From the registered user’s landing page, registered users can access their approved cases by clicking the **Resolve an Issue** tile. The following table lists the information that registered users can use on the My Cases page:

Page Element	Description
Request Access	Click to request access to a case. See the previous section for more information.
Case ID	View the identifier of the case that was generated at the time of case creation.
Description	View detailed information about the issue recorded at the time of case creation.
Compliance Date	View the date by which the responsible party must ensure compliance.

Viewing Case Details

Users can select a case on the My Cases page to open the detail view of the case, where they can:

- Request appeal
- Make payment
- View corrective actions
- Attach photos
- Request an early inspection
- View the assigned code officer’s name and
- View the list of code violations related to the case.

The header shows the issue type, issue subtype, status of the case, case ID, and compliance date.

The following table lists the information that registered users can use on the case detail page:

Page Element	Description
Appeal	Click the link to submit an appeal for the issued violation or citation. On the Appeal page, enter a reason for appeal and click Submit . A text indicates the number of days left for requesting the appeal. Once the appeal is submitted, the text shows the date on which the appeal was submitted. The period in which an appeal can be submitted is determined by the time rules set up by your agency. See <i>Setting Up Time Rules</i> .

Page Element	Description
View Case Notices	Click the button to view the list of notices in a drawer. Select a notice to view in a format that is set up by your agency.
Make Payment	Click to open the Checkout page and pay the case fee.
Ready for Inspection	Turn on the switch if your case is ready for the inspection before the compliance date. Choose this option after you have applied all corrective actions related to the violation. The agency will be notified about your early inspection readiness.
Corrective Actions	Click to open the Corrective actions drawer and view the list of actions the user must take to ensure compliance.
I've resolved this case	<p>Click the link to open the Ready for Early Inspection page and request an early inspection. Use this option if your case is ready for inspection before the compliance date. You add a comment that all corrective actions are taken, and that you have ensured compliance. You can also add photos as supporting document.</p> <p>Clicking Request will return to the case detail page, displaying a message explaining that the property is ready for inspection. The agency will be notified about your early inspection readiness.</p>
Add photos	<p>Drag and drop photo files related to the case. You can add photo, video, or audio files.</p> <p>Click the attachment image to download or delete it.</p>
View Codes	Click to open the Code Violations drawer and view the list of violations related to the case. Each violation record includes the code violation ID, summary, and description.

5 Overview of Working with Incidents and Cases

The Issue Lifecycle

Code enforcement provides a process for tracking, evaluating, and managing possible code violations in your jurisdiction. After an issue is reported, it goes through a defined process where agency staff processes the initial incident and, if a violation is found during the initial inspection, a case is created to enable agency staff to manage the issue until it is resolved.

Incidents, Cases, and Issues

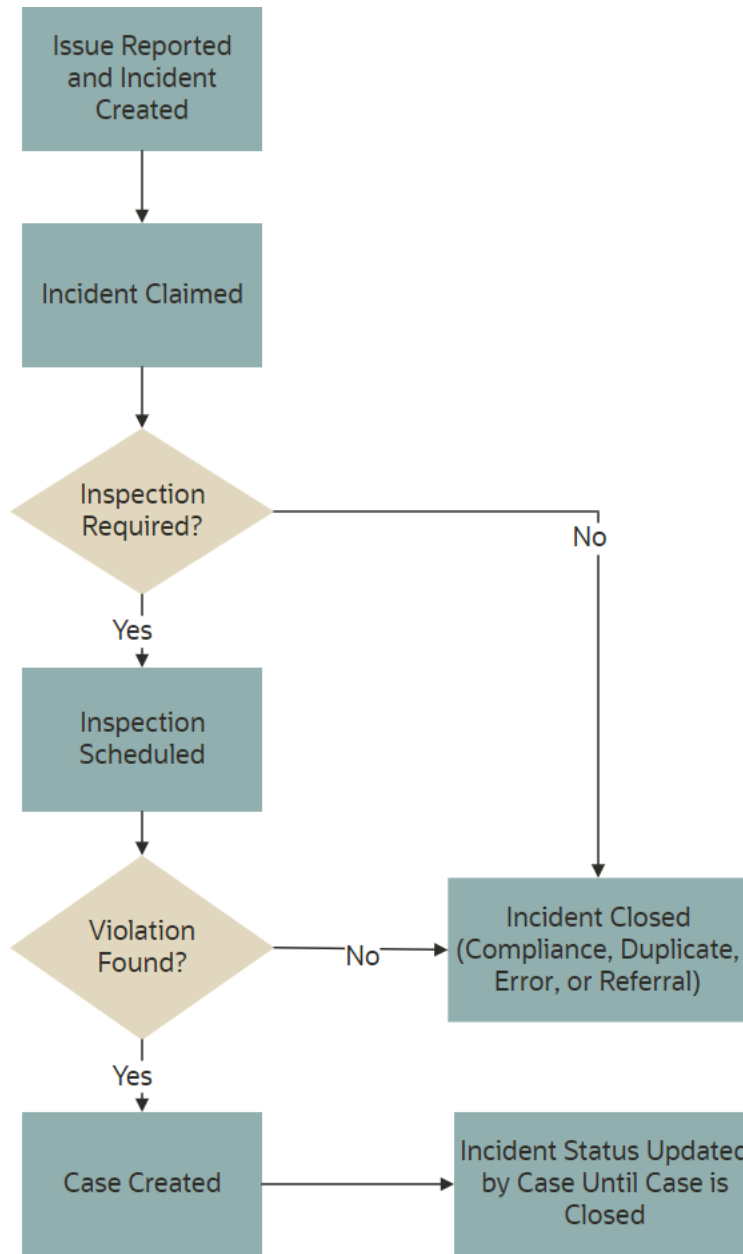
This table explains the different terms that apply to a reported problem.

Term	Definition
Incident	<p>When a problem is reported, the system object that corresponds to the report is an <i>Incident</i>. If several people report the same problem, there can be multiple incidents for the problem.</p> <p>Code technicians claim incoming incidents and process them using a fixed set of possible actions. A technician can close the incident, mark it as a duplicate, assign it to a different technician, or schedule an inspection so that a code enforcement officer can determine if a code violation exists.</p>
Case	<p>If an incident is determined to be a code violation, a case is created. The case is the tracking mechanism for all violation-related activity such as sending a notice of violation, issuing a citation, tracking fees and payments, or managing an appeal.</p>
Issue	<p>Issue is a general term for a problem that is entered into the code enforcement system. It refers to both incidents and cases. An issue is not a system object.</p> <p>Public user pages always use the term <i>Issue</i> because public users don't need to distinguish between incidents and cases.</p> <p>Agency-facing pages use the term <i>Issue</i> in limited situations where incidents and cases appear together.</p>

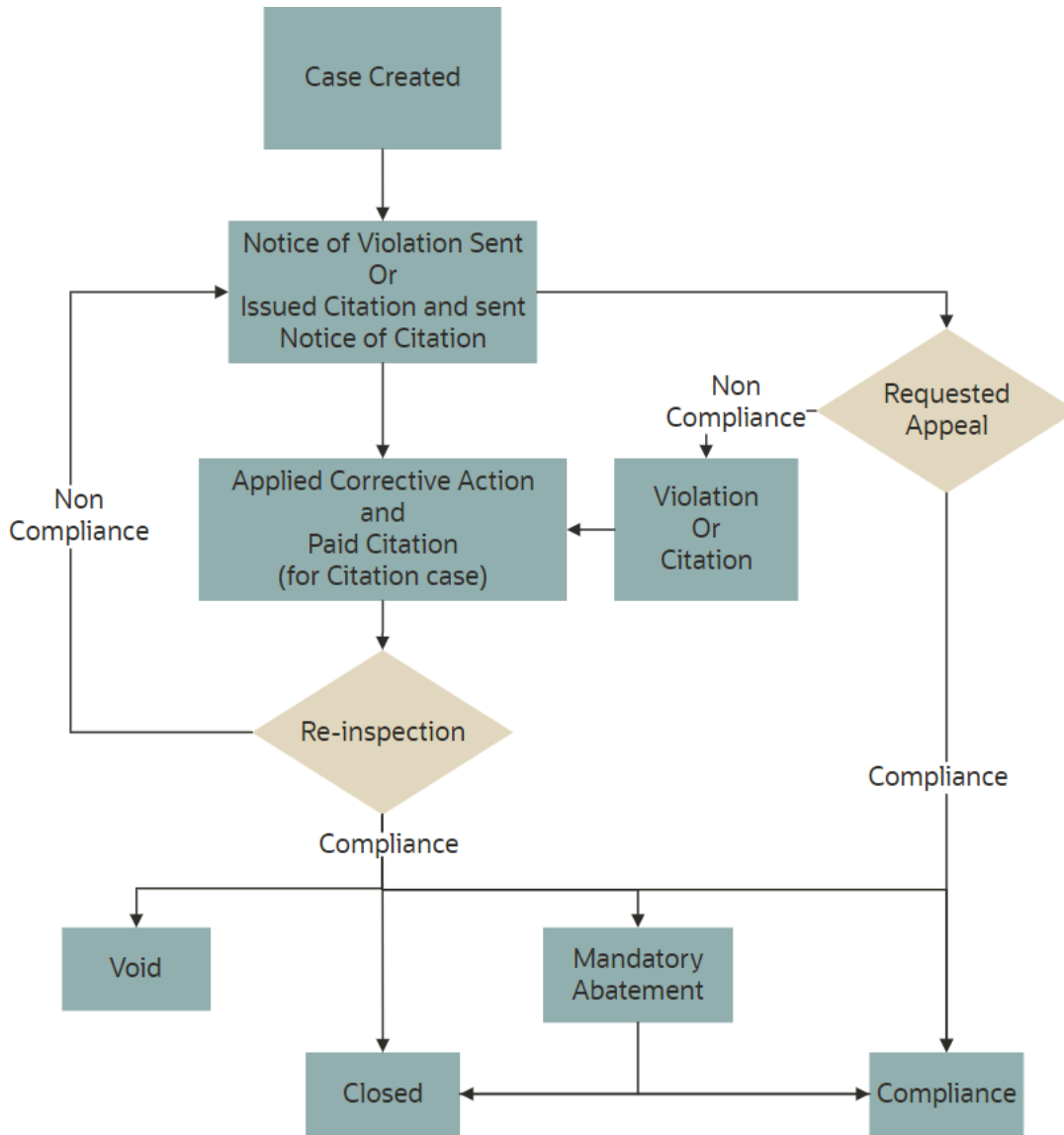
Incident and Case Process Flow

Incidents and cases have their own distinct process flows as illustrated below. Not all issues go through all of these events, but the diagrams provide a general outline of the issue lifecycle.

This diagram illustrates the lifecycle of an incident.



The events in the case lifecycle are illustrated below, although not all cases go through all of these events:
This diagram illustrates the lifecycle of a case.



Time Rules and the Issue Lifecycle

Time rules calculate due dates for specific events based on a trigger date and the issue priority. For events such as inspections that can occur multiple times, the amount of time until the due date can also be based on the occurrence count of the process (first inspection, second inspection, and so forth). An issue subtype definition includes a complete set of time rules, and Issues inherit the rules from the issue subtype.

For more information about setting up time rules, see [Setting Up Time Rules](#).

Reporting an Issue

The code enforcement landing page for public users provides the entry point for members of the public to report issues.

Only registered users can report issues. A user who begins reporting an issue without signing in is prompted to sign in before entering any issue details. Depending on the agency's configuration, users may be allowed to choose whether the issue includes their name and contact information.

Users start an issue report by choosing the general type of problem and then a more specific type of problem. The agency defines these categories by creating issue types and issue subtypes.

Users also provide the issue location, a description, and optional attachments such as photos or videos. Agencies can also add their own questions to collect additional information.

Submitting an issue report creates a new incident and uses the agency's time rules to calculate the due date for reviewing the incident.

For more information about issue reporting, see [Reporting Issues](#).

Claiming an Incident

Code enforcement technicians are responsible for the initial review and processing of incidents.

Technicians use the worklist to view a list of incoming incidents. The main Incoming Incidents tab shows all unassigned incidents. This tab has subtabs for viewing overdue incidents and incidents that are marked as a priority.

From the worklist, technicians use the Claim action to assign themselves to the incident. The technician who is assigned to the incident is then responsible for reviewing and processing it before the incident review due date.

Claiming an incident removes it from the Incoming Incident worklist tab and adds it to the Incidents tab, where technicians can take further action on their assigned incidents.

For more information about claiming incidents, see [Claiming and Assigning Incidents](#).

Reviewing and Processing an Incident

Technicians use the worklist to view their assigned incidents. The main Incidents tab shows all incidents assigned to the current user. This tab has subtabs for viewing overdue incidents and incidents that are marked as a priority.

Technicians have these options for processing incidents:

- Schedule an inspection to determine if a violation has occurred.
The technician chooses a date and a code enforcement officer for the inspection.
- Mark the incident as a duplicate of either another incident or a case.
Technicians can search existing incidents and cases to see if the issue was already reported.
- Close the incident and provide a reason.
Incidents are closed when they are in compliance, invalid, or when they are referred to another agency to handle the issue.
- Reassign the incident to a different technician.

For more information about the actions that a technician can take, see [Processing Incidents](#).

Inspecting the Incident

A mobile inspector visits the location that is related to the assigned incident inspection. The officer completes the inspection by submitting a result on the mobile device, choosing from the four options:

- Mark the incident as in compliance, which closes the inspection.
- Mark the incident as in violation, which creates a case with a status of Violation. A notice of violation is sent to the responsible party and a re-inspection is scheduled. The notice lists the various code violations associated with the violation. It also lists the corrective actions.
- Refer the incident to another agency to handle the issue, which closes the inspection.
- Close the incident if it is invalid.

For more information about mobile inspections, see [Overview of Mobile Oracle Municipal Code Officer](#).

Creating a Case

A case is created when an incident inspection results in violation.

As a code technician, you manage the case activity using a collection of case detail pages that consolidates all aspects of a case:

- Property information, responsible parties, and case history are recorded and managed.
- Recorded inspection activity is tracked and new inspections are scheduled.
- A notice object is created, which the technician uses to generate a notice.
- Code violations are updated.
- Comments and attachments are reviewed.
- Any appeal requests and their hearings are tracked.
- Citations are issued and their fees and payments are tracked.

Note: Agency staff can create a case directly, when a violation is found. There is no need for agency staff to create an incident using the issue reporting process.

For more information about case details, see [Processing Cases](#).

Issuing a Notice of Violation

A code technician is responsible for generating a notice and dispatching it to the party responsible for the violation. You can access the worklist or the case detail pages to work with notices. The following information is available on the Notice of Violation page, which can be updated before generating the notice:

- Compliance date.
- Issue description.
- Responsible party and mailing address.
- Code violations.

The notices page on the worklist allows you to delete code violations. Code technicians can add code violations from case detail pages.

The notice of violation is printed and sent to the responsible party. A copy of the notice is attached to the notice record.

For more information about notices, see [Working with Notices](#).

Issuing a Notice of Citation

Code officers and code technicians can issue citations based on the inspection result and the time rules set up.

A code technician is responsible for generating a notice of citation and dispatching it to the party responsible for the violation. The details of the citation fees and payments are recorded in a separate fees and payments page.

The following information is available on the Notice of Citation page, which can be updated before generating the notice:

- Compliance date.
- Issue description.
- Due date for citation fee payment.
- Responsible party and mailing address.
- Code violations.

The notice of citation, which contains the fee component, is printed and sent to the responsible party. A copy of the notice is attached to the notice record.

For more information about citations, see [Working with Citations](#).

Managing Appeals

Agency staff can act on behalf of the responsible party to request an appeal for a violation or citation that the responsible party is associated with.

Code technicians manage activity related to appeals and hearings in the case detail pages by accessing the **Cases** tile:

- Request appeal.
- Schedule hearing.
- Update hearing decision.

The status of the case changes based on the hearing decision.

For more information about appeals, see [Working with Appeals and Hearings](#).

Making CE Payments

You can make payments on behalf of a responsible party using one of the following methods:

- The code enforcement landing page includes an option for paying fees associated with a case or citation.
- The **Pay** button on the Fee and Payments page. For details, see the section *Viewing and Making Payments for a Case* in the topic [Working with Code Enforcement Fees and Payments](#).

To pay a fee amount from the landing page:

1. On the code enforcement landing page, use the *I want to* option and select **Make CE Payments**.
2. On the Code Enforcement Payments page select one of the options to pay:

- o Case
 - o Citation
3. Enter the ID of the case or citation and click the **Search** button.
 4. The page shows the total amount due. Click the **Pay** button.

Note: You can't pay for items in progress or with no balance.

5. On the **Checkout** page, select a payment method and follow the instructions to complete the payment.
6. Once the payment is successful, a confirmation message appears. The fee details are updated in the Fees and Payments page in the case details.

See *Working with Code Enforcement Fees and Payments*.

Incident and Case Status Updates

As and when the status of a case changes, the status of the associated incident is updated automatically. The following table lists the various status changes for a case and their updates to the associated incident:

Status of Case	Status Update to the Incident
Violation	Violation
Closed as a referral	Closed as a referral, with referral code detail
Closed as a result of compliance	Closed as a result of compliance
Void	Closed, with reason – Error
Compliance	Closed as a result of compliance

Using the Code Technician Worklist

The code technician worklist provides a central location for performing code enforcement tasks. Various tabs list incidents or cases based on where they are in their lifecycle, and action menus provide quick access to the tasks that can be performed at each stage.

Security Details for Using the Code Technician Worklist

This section describes important security roles, requirements, or considerations specific to using the code technician worklist.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Code Enforcement Technician	Access the Code Enforcement Technician Worklist to review and act on pending tasks on cases assigned to themselves.	PSC Code Enforcement Technician

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).

Accessing and Using the Worklist

Access the code technician worklist by clicking the **Code Technician Worklist** tile on the agency springboard. Initially all tabs to which you have access appear. Click a tab to see the incidents or cases that meet the tab filter criteria and to access the relevant actions.

Some tabs have subtabs that further filter the incidents or cases. Subtab action menus have the same actions as the parent tabs.

When you click a tab other than the one that is initially selected, only the newly selected tab and its subtabs are visible. Similarly, when you select a subtab, only that subtab is visible. To return from a subtab to its parent, or from a main tab to the default view where all tabs are visible, click the **Back to Incoming Incidents** icon next to the Search icon.

Common grid controls in Oracle Permitting and Licensing enable public and agency users to perform actions and manage how they display data. For details on the grid controls available in the Worklist, see [Using Grids](#) and [Personalizing Grid Displays](#).

All Inspections, Incidents, Notices, Hearings, and Access Requests

A code technician can view a list of all their assignments together with the assignments in the issue type or subtype that they are assigned to. All assignments – inspections, incidents, notices, hearings, and access requests – can be viewed in separate tabs with their associated subtabs. Each tab and subtab displays the count of assignment records listed on the page, based on the application of any filters.

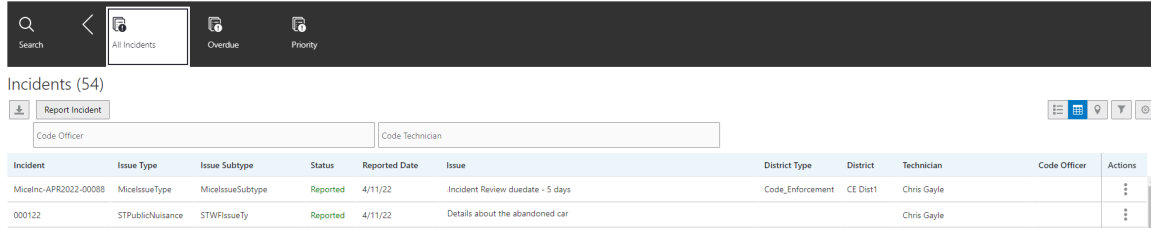
Tab	Subtab	Map Shows
All Incidents	<ul style="list-style-type: none"> Overdue Priority 	Incident name, issue type and subtype, and status.
All Notices	<ul style="list-style-type: none"> Notice of Violation Notice of Citation Ad Hoc Ready to Mail 	Not applicable.
All Hearings	-	Not applicable.
All Access Requests	-	Not applicable.

Grid-level Filter

You can filter the list of assignments for one or more agency staff:

- **Code Officer:** Click and select one or more code officers from the list, to filter and show only their assignments of incidents, notices, hearings, or access requests.
- **Code Technician:** Click and select one or more code technicians from the list, to filter and show only their assignments of incidents, notices, hearings, or access requests.

This example illustrates the Worklist – All Incidents page, which is described in the surrounding text.



Tabs on the Code Technician Worklist

The code technician worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
Incoming Incidents	<p>Unclaimed incidents. These are incidents in <i>Reported</i> status that do not have an assigned technician.</p> <p>This tab includes:</p> <ul style="list-style-type: none"> • A Report Incident button which provides quick access for the user to report a new incident from the worklist. For details on reporting incidents, see Reviewing Incident Lists. • A map view for displaying incident locations. <p>Note: If automatic routing is active, this tab displays only incidents in the user's area of responsibility, as established by the Issue Type and Issue Subtype attributes for the Code Enforcement Technician or Code Enforcement Supervisor job functions. If there are no unassigned incidents in a technicians areas of responsibility, the Worklist tab order changes to show Incidents as its first tab.</p>	<ul style="list-style-type: none"> • Claim (code enforcement technicians) • Assign (code enforcement supervisors) 	<p>Supervisors assign incidents to code enforcement technicians, while technicians claim incidents for themselves. Both actions result in assigning a technician to the incident, which removes the incident from this tab.</p> <p>For more information, see Claiming and Assigning Incidents.</p> <p>The Overdue subtab shows unclaimed incidents with a due date before the current date.</p> <p>The Priority subtab shows unclaimed incidents where the Priority switch is enabled.</p>

Tab	Displays	Available Actions	Additional Information
All Incidents	<p>Unprocessed incidents (those in Reported status) where the current user is the assigned code technician as well as the incidents that match the technician's issue type and subtype.</p> <p>The list also includes reassigned incidents from the administrator or from another staff member.</p> <p>This tab includes:</p> <ul style="list-style-type: none"> • A Report Incident button which provides quick access for the user to report a new incident from the worklist. • A map view for displaying incident locations. 	<ul style="list-style-type: none"> • Schedule Inspection • Mark as Duplicate • Reassign • Release • Reroute Incident • Close 	<p>The actions that are available here are also available from the incident detail page.</p> <p>For more information, about taking action on incidents, see <i>Processing Incidents</i>.</p> <p>Completing any of the available actions removes the incident from this tab.</p> <p>The Overdue subtab shows claimed incidents with a due date before the current date.</p> <p>The Priority subtab shows claimed incidents where the Priority switch is enabled.</p>
Incidents	Unprocessed incidents (those in <i>Reported</i> status) where the current user is the assigned technician.	Same as above	
All Notices	<p>List of notices from cases that are assigned to the code technician as well as the notices that match the technician's issue type and subtype.</p> <p>Notices are separately listed as notice of violations, notice of citations, and ad hoc notices.</p> <p>Violation and citation notice object records are created for violations and citations respectively.</p>	<p>Tabs: Notice of Violation, Notice of Citation, and Ad Hoc:</p> <ul style="list-style-type: none"> • Generate • Continue <p>Tab: Ready to Mail:</p> <ul style="list-style-type: none"> • Download to Print • Update Mailing Details • Mark as Sent 	<p>The notices are classified in the four subtabs – Notice of Violation, Notice of Citation, Ad Hoc, and Ready to Mail.</p> <p>The <i>Generate</i> action signifies that the notice object alone is created, and you should use the action to open the Generate Notice page complete the details, review, and print.</p> <p>Once a notice is in Generated status, it moves to the Ready to Mail tab.</p> <p>The <i>Continue</i> action signifies that the notice is generated, and you can make changes to the details before printing it.</p> <p>Any changes made to the notice process will automatically update the case detail pages.</p> <p>A citation notice additionally contains information about the citation fees.</p> <p>The Download to Print action downloads the report in a separate tab, ready to print.</p> <p>The Update Mailing Details action opens the mailing details modal</p>

Tab	Displays	Available Actions	Additional Information
			<p>page to update the tracking details of the notice report.</p> <p>The Mark as Sent action changes the status of the notice from Generated to Sent. The record is removed from the Worklist. You can access the Notices page in case details and view the detail.</p> <p>See Editing Notice Details under <i>Working with Notices</i>.</p>
Notices	List of notices from cases that are assigned to the code technician. Notices are separately listed as notice of violations, notice of citations, and ad hoc notices.	Same as above	
All Hearings	Cases assigned to the logged in technician that have requested appeals or hearings in <i>Scheduled</i> status. These include the cases that match the technician's issue type and subtype.	<ul style="list-style-type: none"> • View and download attachments added by responsible party • Add or delete your own attachments • Update Hearing Decision • Reschedule Hearing • Cancel 	For details about appeals and hearings, see <i>Working with Appeals and Hearings</i> .
Unassigned Cases	Unassigned cases. These are cases that do not have an assigned technician.	<ul style="list-style-type: none"> • Claim (code technicians) • Multiple Select Claim (code technicians) 	<p>When you click the Claim button, the case is assigned to you and the row is removed from this list page.</p> <p>The Multiple Select button allows you to select multiple cases using check boxes. Click Claim to assign the selected cases to yourself.</p> <p>You can also claim or assign cases to another staff from the Cases list page and the case Overview page. See <i>Processing Cases</i> and <i>Viewing the Case Detail Overview</i>.</p>
All Access Requests	Cases assigned to the logged in technician that have pending requests from registered public users who have asked for online access to the case. These include the cases that match the technician's issue type and subtype.	<ul style="list-style-type: none"> • Allow Access • Deny Access <p>Note: An email notification is sent to the registered user about the request approval or denial.</p> <p>For details, see <i>Adding Responsible Parties</i></p>	<p>Public users who are granted access can view details of their cases and notices online. They can also take actions such as submitting an appeal.</p> <p>Users can't access their case if the agency denies their request.</p>

Tab	Displays	Available Actions	Additional Information
Cases	All active cases assigned to the logged in technician, including the auto-assigned ones. The list also includes reassigned cases from the administrator or from another staff member.	Update Status	<p>Status options:</p> <ul style="list-style-type: none"> • Violation • Closed • Compliance • Void • Mandatory Abatement • Legal <p>Once the status of a case changes to <i>Compliance</i>, it is removed from the list.</p>
Incoming tasks	<p>List of all the workflow tasks related to incidents and cases that are assigned to the logged in technician or the technician group.</p> <p>Incoming tasks remain in the list until they are closed.</p>	<ul style="list-style-type: none"> • Claim • Reassign <p>Once claimed, the Actions options allows you to update, release, or reassign the workflow task.</p>	<p>When you claim a workflow task, the My Tasks subtab will list the task according to how it is assigned – My Tasks or My Group Tasks. You can take these actions:</p> <ul style="list-style-type: none"> • <i>Update</i>: Change the status, priority, or review and add comments and attachments. The Update Tasks page allows you to page through all your tasks and make updates to each task. The Workflow page related to the selected incident or case is updated when you save the changes. • <i>Release</i>: Unassign the workflow task from your list. This is available only for My Tasks assignments. • <i>Reassign</i>: Change the assignee of the workflow task. This is available only for My Tasks assignments. <p>Note: The My Tasks subtab separates the assigned tasks into two subtabs – Assigned Today and Assigned Earlier, depending on the time of assignment.</p> <p>When you reassign a workflow task to another technician, the My Tasks subtab for the assigned technician will list the task.</p> <p>For information on Workflow, see Using Workflow.</p>

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

Using Third-Party Integration for Incident Intake

The Oracle Permitting and Licensing system enables the intake of code enforcement incidents from external sources, with the implementation of third-party integration.

Incident details are entered in the form of a service request and submitted using a third-party application such as the Engagement Cloud. The Oracle Integration Cloud (OIC) application receives the request, processes the incident details, and sends the incident information to the Code Enforcement environment.

This diagram illustrates the process of third-party integration and intake:

Create Service Request

Use the Engagement Cloud application to enter and submit the details of the reported incident including a description, issue location, and category.

Integration

Oracle Integration Cloud receives the request and process the information to send to Code Enforcement.

Access Intake Records

Processed information in the service request originating from the third-party application is received by Community Development Code Enforcement, and the incident is available for agency staff to access in their Worklist.

For information on integration, see [Creating Integrations](#).

Overview of Automatic Routing and Autoassignment

Agencies can set up newly created incidents and cases to be auto-routed to Code Enforcement Technicians and autoassigned to Code Enforcement Officers.

Setting Up Automatic Routing and Autoassignment

When agencies have automatic routing and autoassignment set up, incidents and cases get automatically routed or assigned to agency staff with the appropriate role and access rights.

When you set up the job functions for an agency staff, you can assign job specific attributes to an agency staff member. For example, you can assign the job function of a Code Enforcement Technician to an agency staff member and associate attributes such as Issue types and Subtypes. Similarly, you can assign the job function of a Code Enforcement Officer to an agency staff member and associate attributes such as District and District types.

For more information on issue types, issue subtypes, district types and districts, refer

- [Setting Up Issue Types](#)
- [Setting Up Issue Subtypes](#)
- [Setting Up District Types](#)
- [Setting Up Districts](#)

The following examples show the job attributes and values assigned to a code enforcement technician and

Job Function Detail

* Job Function ID: Code Enforcement Technician

Job Attribute

Job Attribute	Description	Attribute Value
ORA_PSC_CE_ISSUE_SUBTYPE	Code Enforcement Issue Subtypes	
ORA_PSC_CE_ISSUE_TYPE	Code Enforcement Issue Types	
ORA_PSC_CE_ISSUE_TYPE	Code Enforcement Issue Types	Nuisance
ORA_PSC_CE_ISSUE_TYPE	Code Enforcement Issue Types	

officer.

Job Function Detail

* Job Function ID: Code Enforcement Officer

Job Attribute

Job Attribute	Description	Attribute Value
ORA_CODE_INSP_SCHEDULE	Code Enforcement Inspection Work Schedule	E2E_INSPECTORWORKSCHEDULE
ORA_PSC_CE_DISTRICTS	Code Enforcement Districts	E2E_CE_District
ORA_PSC_CE_DISTRICT_TYPES	Code Enforcement District Types	E2E_CE_DistrictType

The following table will help you understand how newly created incidents and cases are auto-routed or auto assigned to agency staff based on their job functions and attributes.

Role	Responsibility	Setup
Code Enforcement Technician	Responsible for all Issue Types	<ul style="list-style-type: none"> • Job Function: Code Enforcement Technician • Job Attribute: Issue Type • Attribute Value: Blank
Code Enforcement Technician	Responsible for one or more Issue Types	<ul style="list-style-type: none"> • Job Function: Code Enforcement Technician • Job Attribute: Issue Type • Attribute Value: Assign specific issue type or issue types
Code Enforcement Technician	Responsible for all Issue SubTypes	<ul style="list-style-type: none"> • Job Function: Code Enforcement Technician

Role	Responsibility	Setup
		<ul style="list-style-type: none"> Job Attribute: Issue SubType Attribute Value: Blank
Code Enforcement Technician	Responsible for one or more Issue SubTypes	<ul style="list-style-type: none"> Job Function: Code Enforcement Technician Job Attribute: Issue SubType Attribute Value: Assign specific issue subtype or subtypes
Code Enforcement Officer	Responsible for all District Types	<ul style="list-style-type: none"> Job Function: Code Enforcement Officer Job Attribute: District Type Attribute Value: Blank
Code Enforcement Officer	Responsible for one or more District Types	<ul style="list-style-type: none"> Job Function: Code Enforcement Officer Job Attribute: District Type Attribute Value: Assign a specific district type or types
Code Enforcement Officer	Responsible for all districts within a District Type	<ul style="list-style-type: none"> Job Function: Code Enforcement Officer Job Attribute: District Type Attribute Value: Assign a specific district type
Code Enforcement Officer	Responsible for one or more districts within a District Type	<ul style="list-style-type: none"> Job Function: Code Enforcement Officer Job Attribute: District Attribute Value: Assign a specific district or districts

Enabling Automatic Routing and Autoassignment

To enable automatic routing for Code Enforcement Technicians at the agency level options for code enforcement:

1. Select **Common Setup > Agency**.
2. Click a row on the Agency Information tab.
3. Select the **Features** tab.
4. Click **Options** for the *Code Enforcement* offering.

The Code Enforcement Options window opens.

5. Under the General Settings section, enable the **Automatically Route Issues** switch.

To enable autoassignment for Code Enforcement Officers at the agency level options for code enforcement:

1. Select **Common Setup > Agency**.
2. Click a row on the Agency Information tab.
3. Select the **Features** tab.
4. Click **Options** for the *Code Enforcement* offering.

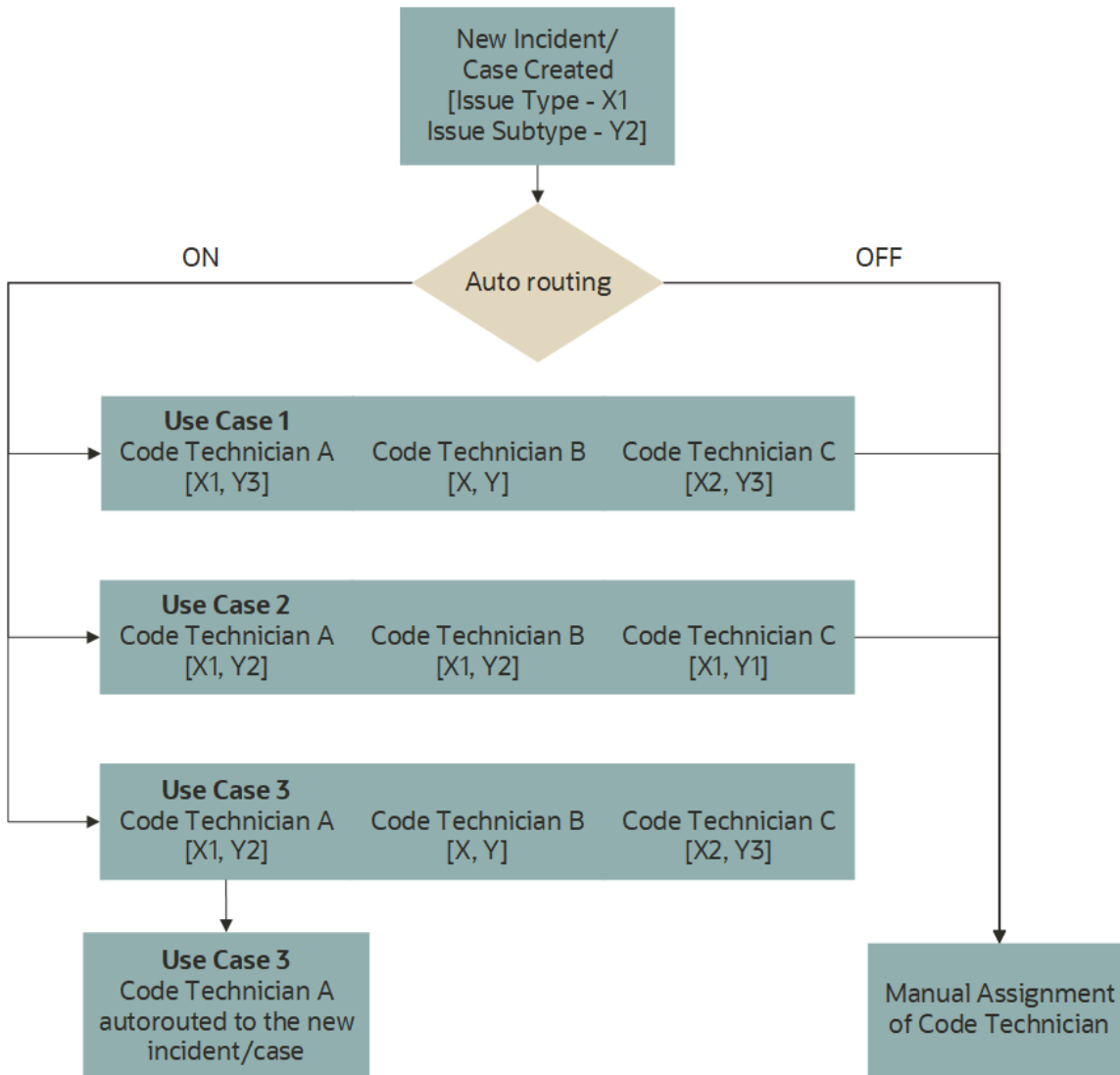
The Code Enforcement Options window opens.

- Under the Inspection section, enable the **Autoassignment** switch.

Automatic Routing of Code Enforcement Technicians

If you enable automatic incident and case routing on the Code Enforcement Options page, then incidents and cases are routed to Code Enforcement Technicians who are responsible for specific issue types and subtypes.

The diagram below shows a few use cases which illustrates how auto-routing incidents and cases to a technician works.



To define a technician’s areas of responsibility using the Issue Type and Issue Subtype attributes for the Code Enforcement Technician and Code Enforcement Supervisor job functions:

- Assign a user to an issue type to make the user responsible for all related subtypes.
- Assign an issue to a subtype when the user is not responsible for all of the subtypes that belong to the related issue type.
- To give a user responsibility for all types of issues, create an Issue Type attribute row, but leave the attribute value blank.

Note: If you don't set up any issue type or subtype attributes, and you activate the system-level setting for automatically routing incidents, incidents and cases will never be routed to the user.

When automatic routing is active, the Incoming Incidents tab on the Code Enforcement Technician worklists shows only the incidents in the user's area of responsibility. Additionally, technicians can only reassign incidents to technicians who have the appropriate area of responsibility.

If there is only one code enforcement technician responsible for a particular issue type or subtype, then those issues are assigned to that technician automatically, and they don't appear on the Incoming Incidents tab unless the technician releases the incident.

Code enforcement supervisors and technicians can assign or reassign incidents and cases to any technician. During this process, the list of available technicians is initially limited to those with the appropriate area of responsibility, but the supervisor can turn on the **Show All Technicians** switch to open up the list of all available technicians irrespective of their area of responsibility.

When automatic routing is active, incidents can only be updated by these users:

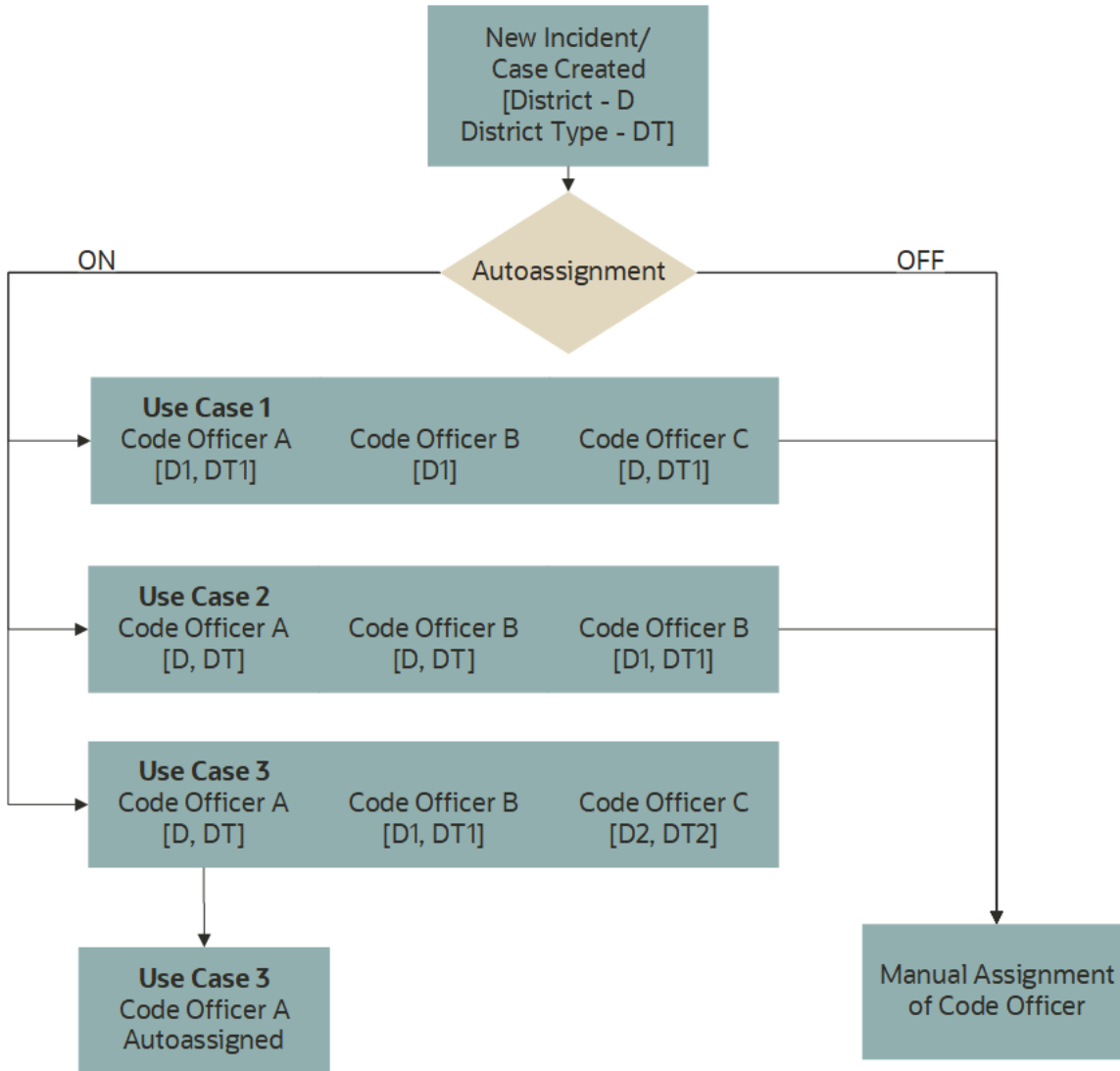
- Users with responsibility for the incident's issue type or subtype.
- Users who are assigned to the incident, regardless of the user's areas of responsibility.
- Supervisors and super users such as a system administrator.

See [Setting Up Agency-Level Options for Code Enforcement](#) and [Setting Up Agency Staff](#).

Autoassigning of Code Enforcement Officers

When an agency opts to use autoassigning, newly created incidents and cases can be autoassigned to an individual Code Enforcement Officer based on his or her job attributes.

The diagram below shows a few use cases which illustrates how autoassigning incidents and cases to an officer works.



A Code Enforcement Officer can be associated with one or more district and district types. Once a Code Enforcement Officer is associated with a district and district type, when a new incident or case is created with that district and district type, that Code Enforcement Officer gets autoassigned to the newly created incident or case.

Note: Autoassignment happens only when a single Code Enforcement Officer is available with the matching district and district types to be assigned to the newly created incident or case.

If there are more than one Code Enforcement Officer available for the newly created incidents or cases, agency staff with the appropriate roles and permissions can claim those incidents and cases or do manual assignments for them.

Define a Code Enforcement Officer’s areas of responsibility using the District and District Subtype attributes for the Code Enforcement Officer job function:

- Assign a user to a District Type to make the user responsible for all district under that district type.
- Assign a District when the user is not responsible for all of the districts that belong to the related district type.

- To give a user responsibility for all district types, create a District Type attribute row, but leave the attribute value blank.

Note: If you don't set up any district or district type attributes, and you activate the system-level setting for autoassignment, incidents and cases will never be assigned to the user.

When autoassignment is active, the Incoming Incidents tab on the Code Enforcement Officer worklist shows only the incidents in the user's area of responsibility. Additionally, officers can only reassign incidents and cases to other officers who have the appropriate area of responsibility.

If there's only one code enforcement officer responsible for a particular district or district type, then those incidents and cases are assigned to that officer automatically, and they don't appear on the Incoming Incidents tab unless the officer releases the incident.

Code Enforcement agency staff, with the appropriate access, can assign or reassign incidents and cases to any officer. During this process, the list of available officers is initially limited to those with the appropriate area of responsibility. During the manual assignment or reassignment process, the agency staff can turn on the **Show All Officers** switch to open up the list of all available technicians irrespective of their area of responsibility.

When autoassigning is active, incidents and cases can only be updated by these users:

- Users with responsibility for the incident's or case's district or district type.
- Users who are assigned to the incident or case, regardless of the user's areas of responsibility.
- Supervisors and super users such as a system administrator.

For more information, see [Claiming and Assigning Incidents](#) and [Reviewing and Claiming Cases](#).

For more information on agency staff, their job functions and attributes, see [Setting Up Agency Staff](#).

For more information on enabling the autoassignment option at the agency level, see [Setting Up Agency-Level Options for Code Enforcement](#).

Autoassigning Code Enforcement Officers to New Rerouted Cases

When a first inspection results in violation but with a change in the issue type and subtype, the newly created case can be automatically assigned to a Code Enforcement Officer based on the officer's job attributes. The system checks the updated issue type, issue subtype and the district type. If a Code Enforcement Officer is available with the matching district type, the officer is automatically assigned to the new rerouted case. If not, the case gets assigned to the officer who created it.

6 Managing Incidents

Security Details for Managing Incidents

This topic describes important security roles, requirements, or considerations specific to managing incidents.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Code Enforcement Incident Inquiry	View Incident detail.	PSC Agency Staff - All agency users
PSC Code Enforcement Incident Management	Manage code enforcement incident details.	PSC Code Enforcement Supervisor PSC Code Enforcement Officer PSC Code Enforcement Technician
Create Standalone Public Sector Incident	Create standalone incidents for Code Enforcement.	PSC Code Enforcement Application Administrator PSC System Administrator
PSC System Administrator	Administer Code Enforcement incidents.	PSC System Administrator
PSC Update Incident Comments Added by Others and Self	Update incident comments added by others and themselves.	PSC System Administrator
PSC Administer Incident Status	Administer incident status changes.	PSC System Administrator PSC Code Enforcement Application Administrator
PSC Delete Incident Comments Added by Others and Self	Delete incident comments added by others and themselves.	PSC System Administrator
PSC Update Incident Attachments Added by Others and Self	Update incident attachments added by others and themselves.	PSC System Administrator
PSC Delete Incident Attachments Added by Others and Self	Delete incident attachments added by others and themselves.	PSC System Administrator

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).

Reviewing Incident Lists

The Code Technician Worklist and the Incidents page display summary information about all reported incidents.

Reviewing Incidents on the Code Technician Worklist

To review incident details on the code technician worklist:

1. From the agency springboard, click the **Code Technician Worklist** tile.
2. Access any tab or subtab that displays incidents.
3. To report a new incident, click the **Report Incident** button.

The availability of this button is determined by your administrator's settings for the **Restrict Direct Incident Creation** feature on the **Agency Information - Agency Features page**:

- o If this option is turned off, the **Report Incident** button is available for all code technicians to report incident.
- o If this option is turned on, the **Report Incident** button is available only to users who have the `ADD_STANDALONE_INCIDENT_PRIV` privilege. The button is not available for users without this privilege.

See [Setting Up Agencies](#).

4. Review the following summary information about incidents:

Page Element	Description
Incident	This column displays: <ul style="list-style-type: none"> o The incident ID that is assigned based on the agency's autonumbering rules. o The incident type and subtype, separated by a hyphen. o The incident status. Unclaimed incidents have a status of <i>Reported</i>. o The date on which the incident was reported.
Location	Displays the incident address and the incident's district type and district. If district information is missing, a warning icon appears in its place. You can use the map to update the missing latitude and longitude information.
Issue	Displays the incident description.
Assigned	Displays the name of the technician or code officer to whom the incident is assigned.
Due By	Displays the date by which the review and processing must be complete. (Processing can be scheduling an inspection, marking the incident as a duplicate, or closing the incident.) If processing is already overdue, a warning icon appears next to the date.

Page Element	Description
	The due date is calculated based on your agency's time rules and the date that the incident was submitted.
Attachments	Click the attachments icon to open a window with an carousel-style viewer for attachments. Each attachment appears as a thumbnail of an image (for pictures or videos) or a generic file type icon (such as a PDF icon).
Actions	Click the Actions icon to quickly complete the following actions: <ul style="list-style-type: none"> ○ Schedule Inspection ○ Mark as Duplicate ○ Reassign ○ Release ○ Reroute Incident ○ Close

5. Click the incident row to access the incident details page.

To return to the code technician worklist, click the **Back** icon in the banner.

For more information about the Incident detail page, see *Working with Incident Details*.

Reviewing Incidents on the Incidents Page

To review incident details on the incidents page:

1. From the agency springboard, click the **Incidents** tile.
2. If automatic routing or autoassignment is on, choose which incidents to view.

Page Element	Description
Show All Types	<p>This switch is visible to code enforcement technicians and supervisors when automatic routing is enabled.</p> <p>When the switch is off, these users see only their assigned incidents and other incidents in their area of responsibility, as determined by the issue types and subtype attributes for their job function.</p> <p>When the switch is on, the users can see all incidents, regardless of their area of responsibility.</p>
Show All District Types	<p>This switch is visible only to code enforcement officers when autoassignment is enabled.</p> <p>When the switch is off, these users see only their assigned incidents and other incidents in their area of responsibility, as determined by the district type attributes for their job function.</p>

Page Element	Description
	When the switch is on, the users can see all incidents, regardless of their area of responsibility.
Show All Statuses	<p>This switch is visible to code enforcement technicians and supervisors irrespective of whether automatic routing is enabled or not.</p> <p>By default, this switch is turned off, and the list shows only the incidents in the <i>Reported</i>, <i>Inspection</i>, <i>Violation</i> statuses. Turn the switch on to show all incidents including those in the <i>Closed</i> or <i>Void</i> statuses.</p>

- To report a new incident, click the **Report Incident** button.

The availability of this button is determined by your administrator's settings for the **Restrict Direct Incident Creation** feature on the **Agency Information - Agency Features** page:


- If this option is turned off, the **Report Incident** button is available for all code technicians to report incident.
- If this option is turned on, the **Report Incident** button is available only to users who have the `ADD_STANDALONE_INCIDENT_PRIV` privilege. The button is not available for users without this privilege.

See [Setting Up Agencies](#).

To report an incident from agency springboard, code enforcement staff can select *Report an Issue* in the **I Want To** field, then click **Go**.

- Review the following summary information about incidents:

Page Element	Description
Incident ID	The incident ID that is assigned based on the agency's autonumbering rules.
Issue Type and Issue Subtype	The issue type and subtype for the incident.
Status	The incident status. Unclaimed incidents have a status of <i>Reported</i> .
Description	A description of the issue.
Reported Date	The date on which the incident was created.
Address and City	Displays the incident address and city.
District Type and District	Displays the incident's district type and district.
Code Technician	Displays the name of the Code Technician, if any, assigned to this incident.

Page Element	Description
Code Officer	Displays the name of the Code Officer, if any, assigned to this incident.
Attachments	Click the attachments icon to open a window with a carousel-style viewer for attachments. Each attachment appears as a thumbnail of an image (for pictures or videos) or a generic file type icon (such as a PDF icon).
Reopened	Displays a reopened  icon for the incidents that were reopened.
Actions	Displays the three-dot actions menu. This menu is not present for closed incidents. For information about the actions in the menu, see <i>Processing Incidents</i> .

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

5. Click the incident row to access the incident details page.

To return to the incidents page, click the **Back** icon in the banner.

For more information about the Incident detail page, see *Working with Incident Details*.

Claiming and Assigning Incidents

When an issue is reported, an incident is created. Code enforcement supervisors can assign incidents to code enforcement technicians, and technicians can claim incidents. The technician who claims an incident or is assigned to it becomes responsible for managing the incident.

The procedures in this topic describe how to assign or claim incidents from the code technician worklist. The same actions are available from the Incident Details page. For more information about the code technician worklist, see *Using the Code Technician Worklist*. For more information about the Incident Details page, see *Working with Incident Details*.

Claiming an Incident

Claiming is the action that code enforcement technicians take to assign incidents to themselves. Code enforcement supervisors who are also code technicians have to use the Assign action rather than the Claim action to assign issues to themselves.

To claim an incident:

1. From the agency springboard, click the **Code Technician Worklist** tile.

The **Incoming Incidents** tab appears by default. The incidents that appear on the list depend on whether you use automatic routing:

- If automatic routing is off, this tab displays all unclaimed incidents.
- If automatic routing is on, this tab displays incidents with types and subtypes in the current user's areas of responsibility.

2. Optionally select the **Overdue** or **Priority** subtab to filter the list of incoming incidents.

To return from a subtab to the main **Incoming Incidents** tab, click the **Back to Incoming Incidents** icon next to the Search icon.

3. Click the **Claim** button to claim an incident.

Claiming an incident makes you the assigned technician. As the assigned technician, you are now responsible for processing the incident.

Any active workflow tasks that were assigned to the previous technician will be automatically reassigned to you. For more details on workflow task assignments, see [Using Workflow](#).

Assigning an Incident

Code enforcement supervisors assign incidents to code enforcement technicians. Supervisors who also have the technician job function use the Assign action rather than the Claim action to assign issues to themselves.

To assign an incident:

1. From the agency springboard, click the **Code Technician Worklist** tile.

The **Incoming Incidents** tab appears by default. The incidents that appear on the list depend on whether you use automatic routing:

- If automatic routing is off, this tab displays all unclaimed incidents.
- If automatic routing is on, this tab displays incidents with types and subtypes in the current user's areas of responsibility.

2. Optionally select a subtab to further filter the list of incoming incidents:

To return from a subtab to the main Incoming Incidents tab, click the **Back to Incoming Incidents** icon next to the Search icon.

3. Click the **Assign** button.

The Assign a Technician window opens.

4. Use these fields to review the list of technicians:

Page Element	Description
Show All Technicians	This check box appears only if automatic routing is on. Select the check box to list all code enforcement technicians, regardless of whether their job function attributes match the current incident's issue type and subtype.

Page Element	Description
	If automatic routing is not enabled, this check box is hidden, and the technician list always includes all technicians.
Name	Displays the names of available technicians.
Incidents	Displays the number of open incidents that the code technician is currently assigned to.

5. Select a technician by clicking the row with the technician’s name.
6. Click **Save**.

This assignment occurs immediately, and the incident disappears from the Incoming Incidents tab.

Any active workflow tasks that were assigned to the previous technician will be automatically reassigned to the new technician. For more details on workflow task assignments, see *Using Workflow*.

Processing Incidents

The code enforcement technician who claims an incident has various options for processing it: scheduling an inspection, marking it as a duplicate, reassigning it to another technician, releasing it back to the pool of unclaimed incidents, rerouting it by updating the issue type or subtype, or closing it.

The following actions are available for processing incidents:

- Schedule Inspection
- Mark as Duplicate
- Reassign
- Release
- Reroute Incident
- Close

Code enforcement technicians access these processing options from an **Actions** menu. This menu appears on the **Incidents** tab of the code technician worklist, which lists incidents where the current user is the assigned technician. It’s also available on the **Overview** section of the Incident detail page. See *Working with Incident Details*.

Note: The **Incidents** tab of the code technician worklist displays the same incident information as the other incident-related worklist tabs.

Accessing Incident Actions from the Worklist

To access the **Actions** menu for an incident in the code technician worklist:

1. From the agency springboard, click the **Code Technician Worklist** tile.
2. Select the **Incidents** tab to view incidents in *Reported* status where you are the assigned technician.
3. Optionally select a subtab to further filter the list of incoming incidents:

- Click the **Overdue** tab to display incidents with a due date before the current date.
- Click the **Priority** tab to display incidents with a priority setting of Yes.

To return from a subtab to the main **Incoming Incidents** tab, click the **Back to Incoming Incidents** icon next to the Search icon.

4. Click the **Actions** icon for an incident.

A drop-down list of actions appears.

Accessing Incident Actions from the Incident Details

The Actions button on the Overview section of Incident Details page is identical to the Actions button on the code technician worklist. Click the button to see a drop-down menu of available actions.

You have two options for accessing incident details:

To access incident details via the code technician worklist:

1. Click the **Code Technician Worklist** tile on the agency springboard.
2. Access a tab that displays the incident you want to access, and locate the incident in the list.
3. Click the **View More Details** icon for the incident.

To access incident details via the Incidents list:

1. Click the **Incidents** tile on the agency springboard.
2. On the Incidents list page, locate the incident and click it.

Scheduling an Inspection When Autoassignment is Active

If the technician who reviews an incident determines that it is a valid incident, the next step is to schedule an inspection. If the code enforcement autoassignment option is active, the system does the work for you.

To schedule an inspection when autoassignment is active:

1. Access the **Actions** menu for an incident.
2. Select **Schedule Inspection** from the menu.

The system schedule an inspection for the next available date. The inspection is assigned to a code enforcement officer who is associated with the incident's district. A confirmation message tells you the inspection date and the assigned officer, and you are done.

Note: In some situations, autoassignment can't be completed. For example, a system-level option sets the maximum number of inspections per day code enforcement officers, so there might not be any eligible officers available on or before the inspection due date. When autoassignment isn't possible, the Schedule an Inspection page opens, and a message explains why the inspection couldn't be scheduled automatically. In this scenario, simply use the Schedule an Inspection page to schedule the inspection manually. When you schedule the inspection manually, you can overbook an officer or set the inspection date past the due date.

Scheduling an Inspection Manually

To schedule an inspection manually:

1. Access the **Actions** menu for an incident.

2. Select **Schedule Inspection** from the menu.

The Schedule an Inspection window opens.

3. Review the following read-only fields for contextual information:

Page Element	Description
Priority	Indicates whether the incident has been marked as a priority. The incident priority can affect the due date calculation.
Due Date	Displays the date by which the inspection should be completed. The inspection due date is determined by the time-based rules for the associated issue subtype. These rules are based on the incident submission date and whether the incident is marked as a priority.
District Type	Displays the incident's district type, which is inherited from the issue subtype.
District	Displays the incident's district, which is based on the district type and the incident location. The default list of available code officers consists of the code officers who are assigned to this district.

4. Accept the default **Inspection Date**, or enter a new one.

The default inspection date is normally the inspection due date. However, if you are scheduling the inspection manually because autoassignment couldn't find an eligible officer before the due date, the default date is the next date that an officer is available without being overbooked.

5. Review any existing comments.

Existing comments display the date and time the comment was created, the user ID of the person who added the comment, and the first 200 characters of the comment text. If any comments are truncated, click the comment to open a window that displays the entire comment. A comments search box is available if any comments exist.

6. Optionally add additional comments:

- a. Click **Add Comment**.
- b. In the Add Comment window, enter your comment in the rich text field.

Alternatively, insert a copy of an existing comment by clicking **Select Comments**. For more information about working with comments, see [Working with Comments](#).

- c. Click **Save** to close the Add Comment window and return to the Schedule an Inspection window.

Even if you cancel the Schedule an Inspection action, the new comment remains.

7. Select an inspector from the list in the **Assign** section.

The list displays the **Name** of each inspector who is available on the inspection date.

The **Inspection Count** for an officer indicates how many inspections that person is already scheduled to perform on the specified date. A warning icon appears next to the count if choosing the officer would overbook the officer (based on your system setting for the maximum number of inspections per officer per day).

If no inspectors are available, change the inspection date.

8. Click **Save** to schedule the inspection on the selected date with the selected inspector. The inspection is scheduled, and the incident status changes to **Inspection**. After you schedule an inspection, the incident no longer appears on the **Incidents** tab of the code technician worklist. You can still access the incident from the incident list and incident details pages. See *Working with Incident Details*.

Checking for Duplicates and Marking an Incident as a Duplicate

To check for duplicates and mark an incident as a duplicate:

1. Access the **Actions** menu for an incident.
2. Select **Mark as Duplicate** from the menu. The Check for Duplicate window opens. The **Selected Incident** section at the top of the window displays the incident ID, issue type, issue subtype, and address for the incident that you are marking as a duplicate.
3. Click the **Cases** and **Incidents** links to view initial lists of possible duplicates. The search that is performed when you open the page shows active incidents and cases that match the issue subtype and location of the selected incident. Cases and incidents appear in separate lists that appear when you click the corresponding links. The search results show the case or incident ID, the issue type and subtype, the status, the address, and the reported date.
4. Optionally enter your own search criteria and click **Search** to look for other cases or incidents that the selected incident duplicates.
5. Select the check box for an incident or case that the selected incident duplicates.
6. Click **Mark as Duplicate**, then click **OK** in the confirmation message window. The original incident status changes to **Closed** with a reason of *Duplicate*. The related issue information is saved so that the Incident detail page for the newly marked duplicate shows which incident or case was duplicated. After you mark an incident as a duplicate, it no longer appears on the **Incidents** tab of the code technician worklist. You can still access the incident from the incident list and incident details pages. See *Working with Incident Details*.

Reassigning an Incident to Another Technician

Note: Reassigning an incident assigns the incident to a new technician, who is then responsible for reviewing and processing the incident. Reassigning does *not* assign the incident to a code enforcement officer who will perform an inspection. To assign an incident for inspection, use the Schedule an Inspection option.

To reassign an incident to another technician:

1. Access the **Actions** menu for an incident.
2. Select **Reassign** from the menu. The Reassign Technician window opens. The **Technician Assigned** field displays the name of the current assignee.
3. In the **Select to Change** area, use these fields to review the list of technicians:

Page Element	Description
Show All Technicians	This check box is available to supervisors (but not to technicians) when automatic routing is on. Supervisors can select the check box to list all code enforcement technicians, regardless of whether their job function attributes match the current incident's issue type and subtype. If automatic routing is not enabled, this check box is hidden, and the technician list always includes all technicians.
Name	Displays the names of available technicians.
Incidents	Displays the number of open incidents that the code technician is currently assigned to.

4. Select a technician by clicking the row with the technician's name.
5. Click the **Save** button.

After you reassign an incident, only the newly assigned technician sees the incident on the **Incidents** tab of the code technician worklist.

Any active workflow tasks that were assigned to the previous technician will be automatically reassigned to the new technician. For more details on workflow task assignments, see [Using Workflow](#).

Releasing an Incident

Releasing an incident clears the Technician Assigned field. This sends the incident back to the Incoming Incidents tab on the code technician worklist so that another technician can claim it.

You can only release incidents in *Reported* status that are assigned to you—that is, where you are the assigned code enforcement technician. If the incident has moved past *Reported* status, you can still reassign it, but you can't release it.

To release an incident:

1. Access the **Actions** menu for an incident.
2. Select **Release** from the menu.

The **Technician Assigned** field is immediately cleared, and the change is saved.

Rerouting an Incident

Incidents are classified based on the issue type and subtype. If automatic routing is enabled, the issue type and subtype route incidents to code technicians with the proper area of responsibility.

The Reroute Incident action enables you to correct an incident's issue type and subtype. The action is available regardless of whether automatic routing is enabled, but automatic routing ensures that the correctly classified incident is directed to the appropriate code technicians.

Rerouting an incident closes the original incident with a reason of *Rerouted* and creates a new incident.

When the new incident is created:

- Information from fields that are common to all incidents gets copied to the new incident.

This includes the location, the description, whether the issue is a public safety risk, and the name and contact information (if any) from the original incident.

- Data in the original incident's custom fields are not copied.
- You can review and edit the new incident information before submitting it.

Use this option to add information in any custom fields for the new incident subtype.

- The agency user who reroutes the incident becomes the creator of the new incident.

If a public user was signed in while creating the original incident, the user can see the incident using the **Track Your Issues** option. After rerouting, however, the new incident is not associated with the original public user account, and it's not included in the user's issue list. The public user can see that the original issue was closed, and the issue details provide the new issue number.

To reroute an incident:

1. Access the **Actions** menu for an incident.
2. Select **Reroute Incident** from the menu.

The Reroute Incident window opens.

3. Enter the corrected **Issue Type** and **Issue Subtype**.

You must change at least one value before you can continue.

4. Click **Continue**.

The Review page appears.

5. Review the information for the new incident.
6. If you need to add or change information for the new incident:

- a. Click **Edit** on the review page to make the fields editable.
- b. Make your changes.
- c. Click **Done** to return to the review page.

7. Click **Submit**.

The original incident is closed with the reason *Rerouted*, and a new incident is created. A confirmation message provides the ID of the new incident.

If automatic routing is active, the new incident is routed to the appropriate code technicians. Otherwise, the new incident goes into the general pool of unassigned incidents.

Closing an Incident Manually

Sometimes an incident can be closed immediately, without first being inspected.

To close an incident:

1. Access the **Actions** menu for an incident.
2. Select **Close** from the menu.

The Close Incident window opens.

3. In the **Close Reason** field, select one of the following reasons:

Value	Description
<i>Compliance</i>	No violation has occurred.
<i>Error</i>	The incident was created in error.
<i>Referral</i>	The incident has been referred to another department or agency.

Note: Other close reasons, including *Duplicate* and *Reroute*, are assigned by the system during related processing.

4. Review any existing comments, and optionally add additional comments.

To add new comments:

- a. Click **Add Comment**.
- b. In the Add Comment window, enter your comment in the rich text field.

Alternatively, insert a copy of an existing comment by clicking **Select Comments**. For more information about working with comments, see [Working with Comments](#).

- c. Click **Save** to close the Add Comment window and return to the Close Incident window.

Even if you cancel the Close Incident action, the new comment remains.

5. Click **Save**.

The incident status changes to **Closed**.

After you close the incident, it no longer appears on the **Incidents** tab of the code technician worklist. You can still access the incident from the incident list and incident details pages. See [Working with Incident Details](#).

Reopening a Closed Incident

Agency staff with the appropriate role and access can reopen a closed incident.

Note: To reopen incidents linked to a case and in the *Violation* or *Closed* statuses, first update the status of the case.

For details, see the section [Updating Status of a Case](#), in the topic [Reviewing and Claiming Cases](#).

Once reopened, the incident goes back to its last active status. A new **Review Due Date** is calculated based on your agency's time rules and the date that the incident was reopened. You can edit or update the incident to schedule an inspection, mark as duplicate, reassign, or reroute an incident based on its new transaction status. A reopened incident retains its history and allows agency users to access all the links associated with it.

To reopen an incident:

1. Click the **Incidents** tile on the Agency springboard.
2. On the Incidents page, turn on the **Show All Statuses** switch, to find the closed incident you want to reopen.

3. Click the incident row to access the Incident Overview page.
4. Click the **Reopen** button, next the incident status.
5. In the Reopen pop-up window, select the reason for reopening the incident from the drop-down menu. The options available are *Closed in error* and *Referred back*.
6. Click **Add Comment** to enter a comment.
7. Click **Save**.

Reopened incidents have the reopened icon



next to its status to indicate that this incident was reopened.

Related Topics

- [Security Details for Managing Incidents](#)

Working with Incident Details

The Incident page includes sections for the incident overview, property information, workflow, details, comments, attachments, communications and history. The page also displays a map with the incident location. Use this page to view and update incident information, to claim or assign the incident, and to perform the actions for processing the incident.

Accessing Incident Details

To access incident details from the code technician worklist:

1. Click the **Code Technician Worklist** tile on the agency springboard.
2. Access a tab that displays the incident you want to access, and locate the incident in the list.
3. Click the incident row.

Note: Grids are rendered in either a condensed or expanded format based on the FSM option selection made by the agency during implementation. On the Incident list page, each agency staff member can now personalize expanded grids to display information in a manner that suits their own requirement. For more information, see [Personalizing Grid Displays](#).

To access incident details from the Incidents list:

1. Click the **Incidents** tile on the agency springboard.
2. On the Incidents list page, locate the incident and click the row.

Using the Incident Overview Tab

The Overview tab on the Incident page displays summary information, enables you to update assignments, and provides access to the same actions that you can perform from the code technician worklist.

To use the Overview tab:

1. Access the incident.
The Incident page appears and displays the Overview tab by default. If you navigate away from this tab, return by clicking **Overview** in the left frame.

2. Review the incident **Status** and, if the incident is closed, review the closure **Reason**.

The following table describes incidents statuses and reasons:

Status	Description
<i>Reported</i>	<p>This incident has not been processed. The status does not indicate whether the incident has been claimed.</p> <p>The Claim action is available if no technician is assigned. After the incident is claimed, the actions for processing the incident become available.</p>
<i>Inspection</i>	An inspection has been scheduled, and the inspection results have not yet been recorded.
<i>Violation</i>	The inspection resulted in a violation. When this happens, a case is created. The incident becomes read-only. When the case is closed, the incident status also changes to <i>Closed</i> .
<i>Closed</i>	<p>When an incident is closed, the Reason provides additional information:</p> <ul style="list-style-type: none"> ○ <i>Compliance</i>: No violation exists, or the violation has been corrected and the related case has been closed. ○ <i>Duplicate</i>: The incident was closed as a duplicate of another incident or of a case. ○ <i>Error</i>: The incident was created in error, or its related case was closed with a status of <i>Void</i>. ○ <i>Referral</i>: The incident (or its related case) was referred to another department or agency. <p>Technicians who are assigned to incidents can use the Close action manually close the incident with any of these reasons except <i>Duplicate</i>. To close a case as a duplicate, the technician uses the Mark as Duplicate action.</p>

3. Review information that is specific to how the incident has been processed:

These fields are visible when relevant:

Page Element	Description
Case	If the incident was determined to be a violation, this field displays the ID of the case that was created. The ID is a link to the case.
Related Incident	If the incident was closed as a duplicate of another incident, this field displays the ID of the other incident. The ID is a link to the transaction.
Related Case	If the incident was closed as a duplicate of a case, this field displays the ID of the case. The ID is a link to the case.
Referral Type and Referral Code	If the incident was closed as a referral, these fields appear.

Page Element	Description
	<p>The referral type indicates if the incident was referred to an <i>Agency Department</i> or to an <i>External Agency</i>.</p> <p>The referral code was selected at the time the incident was closed. For information about referral codes, see <i>Setting Up Referral Bodies</i>.</p>
Rerouted to Incident	If the incident was closed because it was rerouted (assigned a new issue type or subtype), this field displays the ID of the replacement incident. The ID is a link to the incident.
Rerouted from Incident <incident ID>	If the incident was created as a result of rerouting another incident (by changing the issue type or subtype), this message appears next to the incident status. The incident ID is a link to the original incident.

4. Review the following general incident information:

Page Element	Description
Priority	<p>Displays <i>Yes</i> or <i>No</i> to indicate whether the incident is a priority issue.</p> <p>The initial value corresponds to the how the person who reported the incident answered the question Does this issue pose a health hazard or public safety risk.</p> <p>If the incident has been claimed and it is in <i>Reported</i> status, the assigned technician can click the adjacent Edit link to change the incident priority.</p>
Issue Description	<p>Displays a description of the problem that was reported.</p> <p>If the incident is in <i>Reported</i> status, the assigned technician can click the adjacent Edit link to open the Edit Description window and change the description. Even if the technician edits the description, the original issue description still appears on the Details tab.</p>
Service Request ID	Displays the identifier of the service request in the external application. This field appears only if the incident is submitted from an external system.
Service Request Source	Displays the name of the external system from which the incident was submitted. This field appears only if the incident is submitted from an external system.
Location	<p>Displays the location of the incident. This can include an address and any additional location information that was provided.</p> <p>If the incident is in <i>Reported</i> status, the assigned technician can click the map marker icon next to the current location to open the Update Location window and select a new location.</p>


Page Element	Description
	The technician can type the new location into the address search box or drag the map so that the location crosshairs are over the new location. When the technician closes the window, the new address replaces the old one on this page. The original address still appears on the Details tab.
Reported Date	Displays the date that the incident was originally submitted.
Review Due Date	<p>Displays the due date for code technician to process the incident. Claiming an incident is not sufficient: the technician must close the incident or schedule an inspection. (The inspection does not have to be performed by the review due date—it has its own due date.)</p> <p>The review due date is calculated based on the issue subtype, the date the incident was reported, and the incident priority.</p>

5. Review information about the incident district, and update the information if necessary.

Page Element	Description
District Type	<p>Identifies the code enforcement district type for the incident. For example, incidents might be associated with a fire prevention district type.</p> <p>The district type is inherited from the issue subtype and is read-only. However, if the field is blank because the issue subtype doesn't have a district type, you can manually select one. The field becomes read-only after you enter a value.</p>
District	<p>Confirm or update the specific district where the incident is located. This district is based on the district type and the issue location:</p> <ul style="list-style-type: none"> ○ With GIS integration, the system finds the district using the GIS map layer that is associated with the district type. ○ If the agency doesn't use GIS integration, the system looks for the code enforcement district that is associated with the parcel. ○ If the system is unable to determine the district, you can manually enter one. <p>The district determines the default code officers for the incident. For example, if an incident is in fire prevention district 2, then the code officers who are assigned to that district are listed when you schedule an inspection.</p> <p>Code officers are assigned to specific districts using the <i>Code Enforcement Districts</i> attribute of the <i>Code Enforcement Officer</i> job function.</p> <p>For more information about setting job function attributes, see Setting Up Agency Staff.</p>

6. Review and, if necessary, update the incident assignments using these fields:

Page Element	Description
<p>Code Technician</p>	<p>Identify the code enforcement technician who is responsible for the initial review and processing for the incident.</p> <p>You can update this field directly, or use the Reassign action in the Actions menu.</p> <p>Note: When the <i>Automatically Route Issues</i> option, in the Code Enforcement Options page, is turned on and an issue subtype has no code technician assigned in the system, the code technician look up does not display any technicians. In that case, use the Assign Code Technician button to assign a technician to the incident.</p> <p>For details on automatic routing, see <i>Overview of Automatic Routing and Autoassignment</i>.</p> <p>Any active workflow tasks that were assigned to the previous technician will be automatically reassigned to the new technician. For more details on workflow task assignments, see <i>Using Workflow</i>.</p>
<p>Assign Code Technician</p>	<p>Use this button to access the Assign Code Technician modal window. Click Code Technician List or use search option to select and assign a code technician to the incident.</p> <p>Note: This button is available to agency staff with appropriate permissions, only when the <i>Automatically Route Issues</i> option is turned on.</p> <p>Any active workflow tasks that were assigned to the previous technician will be automatically reassigned to the new technician. For more details on workflow task assignments, see <i>Using Workflow</i>.</p>
<p>Code Officer</p>	<p>Identify the code enforcement officer who is responsible for an initial inspection. A code officer is assigned when the inspection is scheduled.</p> <p>This field is editable only if the incident is in the <i>Inspection</i> status. When you change the assignment, the system does not check the new assignee's workload. After you assign the new code officer, the assignment is also updated on the corresponding inspection record.</p> <p>For details on autoassignment, see <i>Overview of Automatic Routing and Autoassignment</i>.</p> <p>Any active workflow tasks that were assigned to the previous officer will be automatically reassigned to the new officer. For more details on workflow task assignments, see <i>Using Workflow</i>.</p>

Page Element	Description
	Click the icon next to the Technician Assigned or Code Officer fields to open a modal page that lists all the technicians or code officers previously assigned to the incident, with the details of the assignment date and time.

7. If an inspection has been scheduled, review the **Inspection** section for details.

Page Element	Description
Inspection ID	Click the inspection ID link to open the Inspection Detail page and view the details of the inspection. You can view the assigned officer, the inspection outcome along with its reason, and the inspection related dates. The Comments and Attachments sections allow you to view the comments and attachments added by the code officer. You can add your own comments and attachments using the Add Comments button and the Add icon respectively.
Status	Displays the status of the inspection. Values include, <i>Scheduled, Canceled and Completed.</i>
Scheduled Date	Displays the date scheduled for the inspection.
Due Date	Displays the due date for the inspection.

8. Use the **Actions** menu to perform any of the following actions:

Action	Description
Schedule Inspection	Select the inspection date and the code officer for an incident.
Mark as Duplicate	Identify another issue (an incident or a case) that this incident duplicates. Incidents that are marked as duplicates are closed, and the ID of the related transaction appears on the Overview tab.
Reassign Technician	Choose a new code enforcement technician. This action has the same result as directly editing the Technician Assigned field.
Release	Clear the Code Technician field.

Action	Description
Reroute Incident	Provide a new issue type and subtype for the incident. If automatic routing is enabled, the incident is routed based on the new values.
Update Tasks	If the incident is associated with a workflow, use this option to update pending workflow tasks.
Close	Close the incident and specify a reason for the closure.

Note: These are the same actions that are available in the code technician worklist on the tabs where code enforcement technicians view their assigned incidents. For more information, see *Processing Incidents*.

Using the Property Information Tab


The Property Information page gives you details about the property associated with the incident.

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the **Incidents** tab.

Alternatively, you can select the **Incidents** tile on the Agency Springboard to view all the incidents in the system.

2. On the Incidents page, click the row for the incident you are working with.
3. Select the Property Information tab in the left panel to open the detail view of the property associated with the incident.

Page Element	Description
Reported Address	View the address from which the incident was reported. This address cannot be modified.
Incident Address	View the address of the property associated with the incident. If the incident address exists in the system, click the link to access the parcel details page to view more information. This address can be updated by the agency staff. Note: A condition icon is displayed next to the Incident Address if the address associated with the incident has a condition applied to it. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.
Parcel ID	View the parcel ID of the property associated with the incident. If the parcel ID exists in the system, click the link to access the parcel details page to view more information.

Page Element	Description
	<p>Note: A condition icon is displayed near the Parcel ID if a parcel associated with an incident has a condition applied to it. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p>
	<p>Click the Edit icon next to Case Address and Parcel ID, to view a snapshot of the corresponding data. Agency users with the required access rights can also edit this information.</p>
Owner	<p>View the name of the owner of the property associated with the incident.</p>
District Type	<p>Identifies the code enforcement district type for the case. For example, cases might be associated with a fire prevention district type.</p> <p>The district type is inherited from the issue subtype. If the field is blank because the issue subtype doesn't have a district type, you can manually select one. The field becomes read-only after you enter a value.</p>
District	<p>Confirm or update the specific district where the case is located. This district is based on the district type and the issue location:</p> <ul style="list-style-type: none"> ○ With GIS integration, the system finds the district using the GIS map layer that is associated with the district type. ○ If the agency doesn't use GIS integration, the system looks for the code enforcement district that is associated with the parcel. ○ If the system is unable to determine the district, you can manually enter one. <p>The district determines the default code officers for the case. Code officers are assigned to specific districts using the Code Enforcement Districts attribute of the Code Enforcement Officer job function.</p>

When an incident is created, the address can be added from the map, selected from parcel IDs in the system (using the **Select Parcel** button) or manually added by the agency staff.

When an incident is created by selecting a location from the map, the system first checks if there is a matching parcel with the same APN as received from the map. When a parcel is found, the system then checks if the parcel has a single address. If so, the system enters that address as the reported and incident addresses. After the parcel ID and address are linked, the system displays any existing related conditions for both. Once linked the incident details are also displayed on the parcel and address transaction pages.

If a matching parcel or a single address is not found, then the agency staff can add the reported and incident addresses manually.

Using the Workflow Tab

Use the Workflow page to see past and current workflow tasks and to manage task assignments, status, priority, and comments.

Note: The Workflow tab is available only when the workflow is enabled and associated with the incident. See, *Code Enforcement Workflow Basics*, *Setting Up Agency-Level Options for Code Enforcement* and *Setting Up Issue Subtypes* to understand how to set up and use the workflow.

The Incident Workflow page gives a two-panel view, with a Task panel and Task Details panel. The two-panel view can further be toggled between a stage view and a milestone view. By default, the stage view is displayed.

To manage an incident workflow task:

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

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

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

Page Element	Description
Stage View and Milestone View icons	Use these buttons to toggle between the stage and milestone views.
Stages	<p>Click the stage buttons at the top of the Workflow page to open the tasks associated with it in the task panels below.</p> <p>The names of these stages and their labels are displayed as configured in the OCI Process Automation workflow process definitions that are defined by the agency. The stages are represented in different colors to show their status:</p> <ul style="list-style-type: none"> ○ Blue: Active ○ Green: Completed ○ Gray: Not active or Terminated <p>You can click the buttons in the active and completed stages to view their details in the Task Details panel.</p> <p>Examples of stages that appear in an incident's workflow include <i>Reported</i>, <i>Inspection</i>, <i>Violation</i>, and <i>Closed</i>.</p>
Milestones	Displays the milestone tasks and the date on which they were completed for the selected incident. Examples of milestone tasks that appear in an incident's workflow include <i>Start</i> , <i>Incident Reported</i> , <i>Inspection Scheduled Today</i> , and <i>Closed</i> .
Terminate Workflow	Click this button to stop or terminate a workflow.

Page Element	Description
	<p>Once a workflow has started, the Terminate Workflow button allows an agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff.</p> <p>Note: You cannot activate a terminated workflow.</p>

5. The tasks and task details are laid out in a two-panel view below the stages or the milestone. The two-panel view includes the following:

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

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

For details on using comments and attachments in workflow tasks, see the topic [Using Workflow](#).

Using the Incident Details Tab

The **Detail** tab on the Incident page displays read-only information from the original issue report.

Note: Because this tab displays the originally reported information, the values displayed here do not get updated when if agency staff updates the corresponding fields on the Overview tab.

To use the Details tab:

1. Access the incident.
2. Click **Details** in the left panel.
3. Review the following read-only information.

Page Element	Description
Address	Displays the original location of the incident.
Additional Location Details	Displays any additional location information that was provided. This field appears only if there is any detail to show.
Issue Description	Displays the original description of the problem that was reported.
Does this issue pose a health hazard or public safety risk?	Displays <i>Yes</i> or <i>No</i> to indicate whether the issue was marked as a health hazard or public safety risk when it was originally reported. This value is also the initial value for the incident priority shown on the Overview tab.
<User-defined fields>	Displays any user-defined fields from the intake form.
Name, Email, and Phone	Displays contact information for the person who reported the incident. If your agency allows public users to hide their information when reporting an issue, these fields can be blank.

For more information about the parcel associated with this incident, see the *Viewing Incidents Associated with a Parcel* section, in *Viewing Transactions Associated with a Parcel*.

Working With Incident Comments

The **Comments** tab on the Incident page enables you to add comments using the same comments tool that you use for adding case comments. For detailed information on adding comments, see *Working with Comments*.

Viewing Incident Attachments

The **Attachments** tab lists the file attachments that were uploaded as part of the original incident report.

To view incident attachments:

1. Access the incident.
2. Click **Attachments** in the left panel.
3. Review information for the attachments in the list:

Attachment information is not labeled, but it consists of the following:

- A thumbnail showing an image (for pictures or videos) or a generic file type icon (such as a PDF icon).
 - File name
 - File size
 - File description, if one was entered when the file was uploaded.
 - Date and time that the attachment was uploaded.
4. To view additional details or update the description:
 - a. Click the **Actions** icon for the row and select **View Details** from the menu.
 - b. Review information in these fields: **File Name, File Size, Uploaded By, and Uploaded On.**
 - c. Review and optionally modify the **Description.**
 - d. Click **Cancel** or, if you updated the description, click **Save**
 5. To download a local copy of the file, click the **Actions** icon for the row and select **Download** from the menu.

The download process is based on your browser. If you're not prompted for a file location, the file is saved to your downloads folder.

6. To remove the attachment from the incident, click the **Actions** icon for the row and select **Delete** from the menu.

Working with Incident Communications

The **Communications** tab on the Incident page enables you to add communications, such as emails, notifications, and texts associated with a specific incident. For detailed information on adding incident communications, see [Working with Incident Communications](#).

Viewing Incident History

To view a history of an incident's status change:

1. Access the incident.
2. Click **History** in the left panel.
3. Review the following status history information:

Page Element	Description
Status	Displays the new status after an incident status change.
Updated By	Identifies the person who performed the action that updated the incident status.
Updated Date	Displays the date that the status changed.
Reason	Displays the reason, if any, that is associated with the status change. For example, if a code enforcement technician closes an incident without scheduling an inspection, this field displays the reason that the technician selected when closing the incident.

Working with Incident Communications

Incident-specific messages enable agency staff maintain correspondence regarding the progress of incidents.



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




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

Sending Incident Communications

1. Click **Incidents** on the Agency Springboard.
Select an incident on the Incidents page.
Click Communications in the navigation bar.
2. On the Communication Details page, click **Add**.
3. On the Ad Hoc Message page, enter values for the following fields:

Page Elements	Definition
Channel Type	<p>Specify what type of ad hoc message you want to send. Values are:</p> <ul style="list-style-type: none"> ○ <i>Email</i>: Generates an email that is sent to users. ○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message. ○ <i>Notification</i>: Generates a notification that appears when users click the notification icon in the application. ○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users. <p>Note: The fields that are available to define on this page vary depending on the channel type that you select.</p>
Visibility	<p>Select which type of user can see this message. Values are:</p> <ul style="list-style-type: none"> ○ <i>Applicant and Contacts</i> ○ <i>Agency staff only</i> ○ <i>Applicant</i>
Display Format	<p>Select the format of the message. Values are:</p> <ul style="list-style-type: none"> ○ <i>HTML</i>

Page Elements	Definition
	<ul style="list-style-type: none"> ○ <i>Text</i> <p>Note: This field does not appear for the <i>Text</i> channel type.</p>
<p>Select, Field, Select an attribute and Insert</p>	<p>These fields enable you to insert variable attributes into your message. You select the field and the attribute that you want to insert in that field, and click Insert to enter a variable for that attribute.</p> <p>For example, if you select the <i>Body</i> field and the <i>Status</i> attribute, and click Insert, the <code>#{Status}</code> variable is inserted into the Message Body field of the message. When you send this message, the status of the incident associated with the message is included in the body text.</p>
<p>Create Web Form</p>	<p>Click to access the Web Form modal page where you create a questionnaire that you can insert into your message.</p>
<p>Insert Web Form</p>	<p>Click to insert the web form questions into the body of your message along with a link that the recipient can use to access and respond to the questionnaire.</p>
<p>To</p> 	<p>Click the Insert button to view a drop-down menu from which you can search for and select recipients. The display shows the options and the count of values available, which are determined by the transaction you are working with and the channel type you selected in the Message Attributes section.</p> <p>For example, when you select a value here for the email channel type, the email ID is inserted into the field. You can delete the ID using the X icon, but you cannot edit it.</p> <p>Enter the email address, user ID, or phone number of the person or organization to whom you want to send the message.</p> <p>Note: Enter email addresses for emails, user IDs for notifications, and phone numbers for texts.</p>
<p>Cc and Bcc</p> 	<p>Enter or click + and select the email addresses of the people or organizations that you want to receive a copy or blind copy of the message.</p> <p>Note: These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>

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

4. Click **Send**.

Communicating Using a Web Form

You can create and send emails or notifications that contain an online form with questions for the applicant or other agency staff. The correspondence contains a link that the recipient can use to access and respond to the questionnaire.

Here's how to create a web form:

1. On the Communication Details page, click **Add**.
2. Enter values for the channel type, such as email or notification, visibility to send to the applicant or agency staff, and the **To**, **From**, and **Subject** fields.
3. Click **Create Web Form**.

- For each row of the web form, enter the **Question Text** along with the **Answer Type** that you expect from the recipient for that question. You can select from these answer types:

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

- Click **OK** to save your web form questionnaire and return to the Ad Hoc Message page. The **Create Web Form** button displays the number of questions included on the web form in parentheses.
- Click **Insert Web Form** to insert the web form questions into the body of your message.
- Click **Send**.

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

Viewing Incident Communications

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

- Click **Incidents** on the Agency Springboard.
Select an application on the Incidents page.
Click Communications in the navigation bar.
You can view the message reference ID, date and time the message was sent, message subject, channel type, and status, such as *Sent*.
- For each row on the Communication Details page you can:
 - Click the **Actions** icon to resend or forward the message.
Select the **Resend** action to access the message in the Message Details modal page in display-only mode. Click **Resend** to send the message another time to the same list of recipients.
Select the **Forward** action to access the message in the Message Details modal page. Enter new recipient email addresses, update the message if necessary, and click **Forward** to send the updated message to the new recipients.
 - Click the **View More Details** button to view detailed information about the message.

7 Managing Inspections

Security Details for Managing Inspections

This topic describes important security roles, requirements, or considerations specific to managing inspections.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Code Enforcement Officer	Access the Code Enforcement Officer Worklist to review and act on pending tasks on inspections and cases assigned to themselves.	PSC Code Enforcement Officer

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).

Using the Code Officer Worklist

The code officer worklist provides a central location for managing code enforcement inspection tasks on a laptop or desktop computer. Various tabs list inspection records based on where they are in their life cycle, and action menus provide quick access to the tasks that can be performed at each stage. You use the code enforcement Inspection page to manage your code enforcement inspection for an incident or case assigned to you.

Tip: As code officers, you can access your inspections on a phone as well as on a laptop or desktop computer. The layout changes based on the device you're using. For detailed information about mobile inspections, see [Overview of Mobile Oracle Municipal Code Officer](#).

Access the code officer worklist by clicking the **Code Officer Worklist** tile on the agency springboard. Initially all tabs to which you have access appear. Click a tab to see the incidents or cases that meet the tab filter criteria and to access the relevant actions.

Some tabs have subtabs that further filter the incidents or cases. Subtab action menus have the same actions as the parent tabs.

When you click a tab other than the one that is initially selected, only the newly selected tab and its subtabs are visible. Similarly, when you select a subtab, only that subtab is visible. To return from a subtab to its parent, or from a main tab to the default view where all tabs are visible, click the **Back to Inspections** icon next to the Search icon.

Common grid controls in Oracle Permitting and Licensing enable public and agency users to perform actions and manage how they display data. For details on the grid controls available in the Worklist, see [Using Grids](#) and [Personalizing Grid Displays](#).

All Inspections, Incidents, Notices, Hearings, and Access Requests

A code officer can view a list of all their assignments together with the assignments in the district or district type that they are assigned to. The assignments – inspections, incidents, notices, hearings, and access requests – can be viewed in separate tabs with their associated subtabs. Each tab and subtab displays the count of assignment records listed on the page, based on the application of any filters.

Tab	Subtab	Map Shows
All Inspections	<ul style="list-style-type: none"> First Inspections: Today, Ready, This Week, and Overdue subtabs. Reinspections: Ready, This Week, and Overdue subtabs. 	Inspection type, ID, issue type and subtype, address, and inspection number.
All Incidents	<ul style="list-style-type: none"> Overdue Priority 	Incident name, issue type and subtype, and status.
All Notices	<ul style="list-style-type: none"> Notice of Violation Notice of Citation Ad Hoc Ready to Mail 	Not applicable.
All Hearings	-	Not applicable.
All Access Requests	-	Not applicable.

Grid-level Filter

You can filter the list of assignments for one or more agency staff:

- **Code Officer:** Click and select one or more code officers from the list, to filter and show only their assignments of inspections, incidents, notices, hearings, or access requests.
- **Code Technician:** Click and select one or more code technicians from the list, to filter and show only their assignments of inspections, incidents, notices, hearings, or access requests.




This example illustrates the Worklist – All Inspections page, which is described in the surrounding text.

The screenshot shows the Oracle Code Officer Worklist interface. At the top, there is a navigation bar with a search icon, a back arrow, and three tabs: 'All Inspections', 'First Inspections', and 'Reinspections'. Below the navigation bar, the text 'Inspections (120)' is displayed. There are two input fields: 'Code Officer' and 'Code Technician'. Below these fields is a table with the following columns: Inspection, Inspection Count, Case / Incident, Issue Type, Issue Subtype, Status, Address, City, Issue Description, Inspection Status, Ready for inspection, Ready early, Comply By, Sched, and Actions. The table contains three rows of data, each representing an inspection record.

Inspection	Inspection Count	Case / Incident	Issue Type	Issue Subtype	Status	Address	City	Issue Description	Inspection Status	Ready for inspection	Ready early	Comply By	Sched	Actions
STInsp-2022-0145	1st Inspection	Micelnc-MAR2022-00046	MicelIssueType	MicelIssueSubtype	Inspection	2306 Encinal Ave	Alameda	Abandoned car	Scheduled	Yes	No		24.03	⋮
STInsp-2022-0004	1st Inspection	MicelCase-2022-00004	MicelIssueType	MicelIssueSubtype	Violation	2306 Encinal Ave	Alameda	Abandoned car	Scheduled	Yes	No	26.03.22	24.03	⋮
STInsp-2022-0157	1st Inspection	Micelnc-MAR2022-00054	MicelIssueType	MicelIssueSubtype	Inspection	2306 Encinal Ave	Alameda	Abandoned car	Scheduled	Yes	No		25.03	⋮

Tabs on the Code Officer Worklist

The code officer worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
All Inspections	<p>List of all inspections assigned to the logged in code officer as well as the inspections that match the officer's district type and ID.</p> <p>Detail page shows the inspection information and provides access to comments, attachments, and code violations.</p> <p> – Indicates that the incident or case is ready for inspection.</p> <p> – Indicates that the case is ready for an early inspection.</p> <p> – Indicates that the date scheduled for the inspection has passed.</p>	<p>Grid-level filters for inspections.</p> <p>List page:</p> <ul style="list-style-type: none"> • Attachments • Comments • Reroute Incident: Available for incidents on first inspection. Click to edit details and submit. • Reschedule • Cancel • View Details <p>Detail page:</p> <ul style="list-style-type: none"> • Update Result: <i>In Compliance, Violation, Referral, Closed</i> • Reschedule 	<p>For details about result options, see Submitting Code Enforcement Inspection Results.</p> <p>Submitting the details will create a case with the details provided.</p>
Inspections	List of all inspections assigned to the logged in officer.	Same as above	Same as above
First Inspections	<p>List of all new inspections assigned to the officer.</p> <p>Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.</p>	Same as listed above.	See the next section.
Reinspections	<p>List of reinspections. These are the follow-up inspections after the first inspection is complete with a result.</p> <p>Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.</p>	Same as listed above.	See the next section.
Today	List of all inspections that are due on the current date	Same as listed above.	
Tomorrow	List of all inspections that are due on the next date.	Same as listed above.	
Ready	List of Inspections related to incidents and cases that have passed their compliance date.	Same as listed above.	

Tab	Displays	Available Actions	Additional Information
This Week	List of all inspections that are due in the current week.	Same as listed above.	
Overdue	List of inspections from cases that have passed their inspection due date.	Same as listed above.	
All Incidents	<p>Unprocessed incidents (those in Reported status) where the current user is the assigned code officer as well as the incidents that match the officer's district type and ID.</p> <p>The list also includes reassigned incidents from the administrator or from another staff member.</p> <p>This tab includes:</p> <ul style="list-style-type: none"> • A Report Incident button that provides quick access for the user to report a new incident from the worklist. • A map view for displaying incident locations. 	<ul style="list-style-type: none"> • Schedule Inspection • Mark as Duplicate • Reassign • Release • Reroute Incident • Close 	<p>The actions that are available here are also available from the incident detail page.</p> <p>Completing any of the available actions removes the incident from this tab.</p> <p>The Overdue subtab shows claimed incidents with a due date before the current date.</p> <p>The Priority subtab shows claimed incidents where the Priority switch is enabled.</p>
Incidents	List of all incidents assigned to the logged in officer.	Same as listed above.	
All Notices	<p>List of notices from cases that are assigned to the code officer as well as the notices that match the officer's district type and ID. Notices are separately listed as notice of violations, notice of citations, and ad hoc notices.</p> <p>Violation and citation notice object records are created for violations and citations respectively.</p>	<p>Tabs: Notice of Violation, Notice of Citation, and Ad Hoc:</p> <ul style="list-style-type: none"> • Generate • Continue <p>Tab: Ready to Mail:</p> <ul style="list-style-type: none"> • Download to Print • Update Mailing Details • Mark as Sent 	<p>The notices are classified in the four subtabs – Notice of Violation, Notice of Citation, Ad Hoc, and Ready to Mail.</p> <p>The <i>Generate</i> action signifies that the notice object alone is created, and you should use the action to open the Generate Notice page complete the details, review, and print.</p> <p>Once a notice is in Generated status, it moves to the Ready to Mail tab.</p> <p>The <i>Continue</i> action signifies that the notice is generated, and you can make changes to the details before printing it.</p> <p>Any changes made to the notice process will automatically update the case detail pages.</p> <p>A citation notice additionally contains information about the citation fees.</p>

Tab	Displays	Available Actions	Additional Information
			<p>The Download to Print action downloads the report in a separate tab, ready to print.</p> <p>The Update Mailing Details action opens the mailing details modal page to update the tracking details of the notice report.</p> <p>The Mark as Sent action changes the status of the notice from Generated to Sent. The record is removed from the Worklist. You can access the Notices page in case details and view the detail.</p> <p>See Editing Notice Details under Working with Notices.</p>
Notices	List of notices from cases that are assigned to the code officer. Notices are separately listed as notice of violations, notice of citations, and ad hoc notices.	Same as above	
All Hearings	Cases assigned to the logged in officer that have requested appeals or hearings in <i>Scheduled</i> status. These include the cases that match the officer's district type and ID.	<ul style="list-style-type: none"> • View and download attachments added by responsible party • Add or delete your own attachments • Update Hearing Decision • Reschedule Hearing • Cancel 	For details about appeals and hearings, see Working with Appeals and Hearings .
All Access Requests	Cases assigned to the logged in officer that have pending requests from registered public users who have asked for online access to the case. These include the cases that match the officer's district type and ID.	<ul style="list-style-type: none"> • Allow Access • Deny Access • Edit Details 	<p>Public users who are granted access can view details of their cases and notices online. They can also take actions such as submitting an appeal.</p> <p>Users can't access their case if the agency denies their request.</p>
Assigned Cases	<p>List of all the cases assigned to the officer for inspections, as well as the auto-assigned ones.</p> <p>Detail pages show the complete details of the case.</p>	<p>List page: Create Case: Create a new case.</p> <p>Actions: Select and choose from options <i>Attachments</i>, <i>Comments</i>, and <i>Update Status</i>.</p>	For information about case details, see Processing Cases .
Completed Inspections	<p>List of all inspections with status as <i>Completed</i>.</p> <p>Detail page shows the inspection information and provides access</p>	None	See the next section.

Tab	Displays	Available Actions	Additional Information
	to comments, attachments, code violations, and notices.		
Incoming Tasks	<p>List of all the workflow tasks related to incidents and cases that are assigned to the logged in officer or the officer group.</p> <p>Incoming tasks remain in the list until they are closed.</p>	<ul style="list-style-type: none"> • Claim • Reassign <p>Once claimed, the Actions options allows you to update, release, or reassign the workflow task.</p>	<p>When you claim a workflow task, the My Tasks subtab will list the task according to how it is assigned – My Tasks or My Group Tasks. You can take these actions:</p> <ul style="list-style-type: none"> • Update: Change the status, priority, or review and add comments and attachments. The Update Tasks page allows you to page through all your tasks and make updates to each task. The Workflow page related to the selected incident or case is updated when you save the changes. • Release: Unassign the workflow task from your list. This is available only for My Tasks assignments. • Reassign: Change the assignee of the workflow task. This is available only for My Tasks assignments. <p>When you reassign a workflow task to another officer, the My Tasks subtab for the assigned officer will list the task. For information on Workflow, see Using Workflow.</p>

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

Reviewing Code Enforcement Inspection Details

As a code enforcement officer, you manage the inspection details of your assigned incident or case using the code enforcement Inspection page.

Code enforcement technicians schedule inspections for incidents and cases. For details about assigning inspectors and scheduling inspections, see [Processing Incidents](#) and [Working with Code Enforcement Inspections](#).

Access the code enforcement Inspection page by selecting an inspection record in the Code Officer Worklist.

Reviewing the Inspection Details

The Inspection Details tab displays the summary information about the scheduled inspection – status, ready for inspection, scheduled date, due date, address of the location, issue description, assigned inspector, comply by date, and inspection completion date. Click the case ID or incident ID link to go to the case or incident associated with the inspection.

On the Inspection Detail page, review important information about the selected inspection in separate sections.

Note: Only those sections that contain data records to show are displayed on the Inspection Detail page.

The **Prior Inspections** section displays a summary of all inspections associated with the incident or case. Click a row to see details of that inspection.

The **Incident Detail** section shows the incident ID, reported date, issue type and issue subtype of the incident. Click the incident ID link to open the Incident overview page to view details of the incident associated with the case.

Turn on the **Ready for Inspection** switch when the responsible party has requested for an inspection prior to the scheduled inspection date. The inspection status on the Inspections page changes to *Scheduled – Ready*, and the case is ready for the code officer to inspect.

Note: This switch is available for edit only when the case has a scheduled inspection for violation or citation, and remains until the compliance date is reached.

You can take the following actions related to your inspection:

- **Update Result:** Click the button to view and select a result option after the inspection.
- **Reschedule:** Click the button to open the Inspection page and select a new date for the inspection.
- **Cancel Inspection :** Click to cancel the inspection

Resulting Inspections

Result options available are based on factors such as, if the inspection is for an incident or a case, if it is the first inspection or reinspection, and the status of the incident or case:

- In Compliance
- Not in Compliance: This option is available when you are resulting an inspection for a case in *Appeal, Hearing, or Legal* status.
- Violation
- Referral
- Closed
- Void
- Issue Citation
- Remains in Violation/Citation
- Mandatory Abatement
- Extension

For details about statuses and result options available for an incident and for case, see [Submitting Code Enforcement Inspection Results](#).

Note: When a case is in *Appeal*, *Hearing*, or *Legal* status, the inspection result options are limited to **In Compliance**, **Extension**, and **Not in Compliance**. After you submit the result, a new inspection can be scheduled from the Inspections page. If an inspection is already scheduled, the **Reschedule** option will be available. For details, see [Working with Code Enforcement Inspections](#).

When you are updating the result as in violation, the system allows you to change the issue type, issue subtype, code violations, and the address:

1. Click the **Update** button to open the Issue Type confirmation Page and select the desired issue type and subtype.
2. Click the **Next** button to open the Code Violations page and add code violations.
3. Click the **Next** button to enter or update the address location and click Done.

Compliance Date Calculations based on Inspection Result

Time rules, which are set up by your administrator, determine the compliance date when you submit an inspection result:

- *Violation:* When a case is in violation, the compliance date is calculated from the case creation date.
- *Citation:* The compliance date is calculated from the date you issued the citation.
- *Remains in Violation:* The compliance date is calculated from the inspection completion date.
- *Remains in Citation:* The compliance date is calculated from the inspection completion date.

When a case is created (violation or citation), the compliance date is calculated based on the case creation date. For inspections that are scheduled thereafter, the time rule configured for the compliance due date calculation uses the unit of measure (UOM) value that is associated with the policy occurrence count as the number of days required to comply. Accordingly, the date of compliance will be calculated by adding the UOM value to the inspection completion date. Appeal due dates are calculated on the same basis.

For example, if the first inspection (Policy Occurrence Count =1) is completed on the 10th of January, and if the policy occurrence count is mapped to a unit of measure value of 5, then the compliance period will be 5 days. The compliance date will be the 15th of January.

The compliance date is updated on the Inspection detail page and on the Case Overview page.

For details on configuring policy occurrence count and UOM, see [Setting Up Time Rules](#).

Sections on the Result Inspection page

Select a result option from the Update Result button to open the Result inspection page. Enter values for the fields in the sections:

Element	Description
Completion Date	Enter the date when you are completing the inspection. Shows the current date by default.
Create a violation notice switch	Turn on the switch to create notice of violation when you submit. This option is available for Remains in Violation result.
Description	Enter a description.

Element	Description
Case Complied On Date	Enter the date on which the case confirmed compliance. This option is available only when you select the In Compliance result.
Existing Case Comply by Date	Displays the existing date by which the case must confirm compliance.
New Case Comply by Date	Displays the new date by which the case must confirm compliance. You can enter a new date.
Reinspection Scheduled For	Displays the reinspection schedule date. You can enter a new date.
Inspection Due Date	Displays the inspection due date.
Use the same comply by date for all open violations check box	<p>This check box is selected by default.</p> <p>If you don't want to apply the new comply by date for all open violations related to the case, deselect this check box. The earliest and latest violation comply by dates are displayed to help you set the new case comply by date or the next inspection scheduled date.</p>
Comments	Add any comments related to the current inspection.
Attachments	Add any attachments related to the current inspection.
Submit	Click to submit the inspection result.

Note: The availability of sections listed above are based on the result option you select. For example:

- When you select the result as Mandatory Abatement, you can only change the completion date and add comments and attachments.
- When you select the result as Extension, you can change the case comply by date and you must enter a reason for extension.

Reviewing the Attachments

The Inspection Attachments tab allows you to view and add attachments related to the inspection. For details about attachments, see *Processing Incidents*.

Reviewing the Comments


The Inspection Comments tab allows you to view and add comments related to your inspection. For details about comments, see *Processing Incidents*.

Reviewing the Code Violations

The Code Violations tab allows you to manage the code violations that were entered at the time of creating the issue and during previous inspections. Expand a code violation record to view the description, corrective actions, and the available actions. Each record shows the status of the code violation:

- **Open** – The status of a newly added code violation.
- **Canceled** – The status of the code violation when the code officer removes the violation record that was added to the case from a previous inspection.
- **Resolved** – The status of the code violation when the code officer resolves the code violation after confirming compliance.

Code officers can add new violations and their corresponding corrective actions for the current inspection. Use the Actions menu that is available for every code violation to take actions such as Resolve, Remove from Case, and Reopen.

Page Element	Description
Add button	Click to open the Select Codes page and add one or more violations. You can select from a list of current and other violations. Click Done after selecting the violation records. The corresponding corrective actions are also added and listed on the Code Enforcement Inspection page.
Resolve	Select the related action to resolve the code violation. A violation is resolved when the responsible party has implemented the corrective actions.
Edit Complied on Date	Select the date on which the responsible party ensured compliance. This field is available only for resolved violation records.
Edit Comply by Date	Select the date on which the responsible party must ensure compliance. This change won't alter the inspection schedule date.
Remove from Case	<p>Select the related action to remove the code violation from the case.</p> <p>Note: If you try to remove the code violation that was added in a previous inspection, the violation will be canceled and not removed from the case. However, if you remove the violation that is added from the current inspection, the record is deleted from the case.</p> <p>Also note that you cannot remove a code violation that is associated with a citation.</p>
Reopen	Select the related action to reopen the code violation from its resolved or canceled status. This option is not available if the case is in one of the statuses – In Compliance, Closed, or Void.
	Click the icon to open the Violation page and modify the summary or description. You can use the Rich Text formatting options in the description.

Page Element	Description
	<p>Clicking the Edit icon for a corrective action will open the Corrective Action page and you can change the text of the corrective action using the Rich Text formatting options.</p> <p>Click Done after making the changes.</p>

Reviewing the Notices

The Notices tab allows you to manage all the inspection related notices, which include system generated notices and the ad hoc notices. System generated notices are predefined and are automatically added to the notice after the inspection result submission. Ad hoc notices are added by the code enforcement staff after completing inspections. Code officers can add new ad hoc notices for the current inspection using the Add Ad Hoc Notice page.

Notices are added based on your agency configuration. See *Setting Up Notices and Reports*.

The Notices page lists all the notices with details of their ID, name, type, category, count, case status, notice status, notice creation date and sent date. You can view the generated, pending, and canceled notice records. Use the **Actions** menu to view options based on the status of the notice:

- *Generate*: Click to generate the ad hoc notice and open the report in a separate page of your browser. The status of the notice changes to Generated.
- Note:** In the Oracle Municipal Code Officer app, system generated notices are automatically added and ad hoc notices can be added by code officers. Notices can be printed by code officers through the Oracle Municipal Code Officer app, using the **Print** option. However, these notices cannot be reviewed or edited before printing. See *Working with Code Enforcement Inspection Details*.
- *Cancel*: Click to cancel the notice. This option is available until the notice is generated. The status of the notice changes to Canceled.
 - *Print*: Click to print the notice report, which opens in a separate page of your browser. This option is available only for generated notices.

To add a notice, click the **Add Notice** button, which opens the Add Notices page. You can use the category filter or search and select a notice from the available ad hoc notices. Click the **Select** button on the notice record to add the notice to the inspection and return to the notices list page. The newly added notice will be in Pending status.

Note: The Notices tab appears only for inspections that are in *Completed* status. You can add a notice even if the case is in *Closed* status.

8 Using Oracle Municipal Code Officer

Security Details For Using Oracle Municipal Code Officer

This topic describes important security roles, requirements, or considerations specific to using Oracle Municipal Code Officer.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Code Enforcement Officer	Access Mobile Oracle Municipal Code Officer.	PSC Code Enforcement Officer
PSC Update Code Enforcement Inspection Comments Added by Others and Self	Update Code Enforcement inspection comments added by others and themselves.	PSC System Administrator
PSC Delete Code Enforcement Inspection Comments Added by Others and Self	Delete Code Enforcement inspection comments added by others and themselves.	PSC System Administrator
PSC Update Code Enforcement Inspection Attachments Added by Others and Self	Update Code Enforcement inspection attachments added by others and themselves.	PSC System Administrator
PSC Delete Code Enforcement Inspection Attachments Added by Others and Self	Delete Code Enforcement inspection attachments added by others and themselves.	PSC System Administrator

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).

Overview of Mobile Oracle Municipal Code Officer

Use the Oracle Municipal Code Officer mobile application to manage a variety of code enforcement inspections on a daily basis.

Oracle Municipal Code Officer provides government field staff the ability to enforce code compliance using productivity tools to perform and report on inspections from a mobile device.

The Oracle Municipal Code Officer mobile application is accessible through a URL rather than a download from an app store. You will need to configure the URL using the following example:

`https://<host>/fscmUI/redwood/ce-inspections`

You can then use this URL to access the Code Officer mobile application from any smartphone or tablet.

From the browser that you use to access the URL, select the share icon.

Choose the "Add to home screen" option.

This will load the Oracle Municipal Code Officer application tile on your smartphone or tablet's homescreen. This allows you to access the application by clicking the tile rather than entering the URL.

Installing and Configuring Oracle Municipal Code Officer

The Oracle Municipal Code Officer mobile application is accessible through a URL.

From Update 24C onwards, the Oracle Municipal Code Officer mobile application is accessible through a URL rather than a download from an app store. For the steps to access this mobile application, see *What's New*—Update 24C for Oracle Permitting and Licensing.

Viewing the Worklist

When you log into the Oracle Municipal Code Officer mobile application, you see an Inspection Tasks list with all your inspection tasks organized in separate foldouts.

On the Inspection Tasks page, code officers can:

- View the inspections list.
Inspections are listed with status badges for Ready, Completed and Overdue. The information displayed on each inspection row includes: scheduled or due dates, inspection count, location, the code office assigned, a short description for the incident or case details, incident or case identifier. Inspections with the Overdue and Ready badges often display an one-liner about it's status.
- Apply filters and search inspections.
The first level filters include: code officer, code technician, all scheduled inspections, first inspections, reinspections and completed inspections. You can add one or more of these filters in your search.
For all the inspections-related filters, you can apply a second level of filters, which include: inspections scheduled for today, tomorrow, or this week, and inspections that are ready and overdue.
- Sort inspections.
These are some of the sorting options available: inspection count, case or incident, issue type or subtype, case or incident status, scheduled, due and completed dates, priority, readiness for inspection, and address of the location under inspection.
- View the status of the incident or case.
- View the inspections in the map on the page.
- Create a new case.

- Initiate actions from the three-dot action menu to:
 - View details of the inspection.
 - View and add comments and attachments.
 - Reschedule inspection.
 - Cancel inspection.

This example illustrates the code officer's view of the Inspection Tasks page:

Using the Map

The Inspection List page displays a map with the locations of the scheduled inspections in the list.

This interactive map allows you to zoom in and zoom out to better understand the inspection location, which is represented with a map icon.

Creating a New Case

Code enforcement officers such as an inspector can directly create new cases, which are not part of any assigned incident or case.

To create a new case:

1. At the bottom of the Inspection Tasks page, click the **Create Case** button.

You can also access the New Violation button from the **Action** menu on the Inspection page.

Note: The availability of the **Create Case** button is determined by your administrator's settings for the **Restrict Direct Case Creation without Incident** feature on the **Agency Information - Agency Features** page:

- If this option is turned off, the **Create Case** button is available for all code officers to click and create a new case without a reported incident.
- If this option is turned on, the **Create Case** button is available only for code officers with the `ADD_STANDALONE_CASE_PRIV` privilege.

See *Setting Up Agencies*.

2. Select the issue type and subtype for the new case and click **Continue**.

Note: You can cancel this process at any step by using the **Cancel** option from the three-dot action menu at the upper right of the page.

3. Use the map page to locate the property for which you are creating the case and click **Next**.
4. Scroll down to enter a description of the issue.

From the **Attachments** section, you can attach a photo, video, or an audio file as reference.

From the **Violations** section, click **+** to open the **Add violation** page and include one or more code violations from a list of current or other violations. Each newly added code violation is in the Open status. The value is

updated whenever the status is updated in the Code Enforcement Inspection – Code Violations page or the Case Code Violations page. See [Using the Code Officer Worklist](#) and [Working with Code Violations](#).

Note: The fields on the new case creating pages are as configured by the agency administrator.

5. Click **Submit**.

Rescheduling an Inspection

You reschedule an inspection assigned to you using the Reschedule page. To reschedule an inspection:

1. On the Inspection Tasks page, click the action button on the row of the inspection you want to reschedule.
2. Select **Reschedule**.
3. The Reschedule page displays the inspection due date and the current schedule date of the inspection. Click **New Schedule Date** and select one of the available dates shown in the calendar.
4. Click **Save**.

You can also reschedule an inspection from the inspection details page. For more information, see [Working with Code Enforcement Inspection Details](#).

Canceling an Inspection

You can cancel an inspection assigned from the Inspection Tasks page or the Inspection details page. To cancel an inspection:

1. On the Inspection Tasks page, click the action button on the row of the inspection you want to cancel. Alternatively, on the Inspection details page, click the action button.
2. Select **Cancel** or **Cancel Inspection**.
3. Click **Cancel Inspection**, again on the confirmation message.

Working with Code Enforcement Inspection Details

In the Oracle Municipal Code Officer Mobile application, you view inspection details and initiate actions for performing inspections on the Inspection page.

Access the Inspection list on Code Officer mobile application by using your agency's host URL. On the Inspection page you view the:

- Inspection count (as configured by the administrator on the Inspection Count page)
- Inspection identifier
- Status badges for inspections that are *Ready*, *Completed* and *Overdue*
- Three-dot Actions menu
- Result drop-down menu
- Location
- Description
- Inspection scheduled date
- Inspection due date
- Compliance date


- Name of the assigned code officer and code technician
- Case or incident details, such as the issue subtype, case or incident identifier, description and case status badges like, Violation, Compliance, Remains in Violation.
- Request for early inspection switch

You can swipe left to see the foldouts for Code violations, Comments, Attachments, Time Recording, Notices, Prior Inspections.

Elements on the Inspection Tasks Page

You can perform the following actions on the Inspection Tasks page:

Page Element	Description
Inspection identifier, type, and status	View the inspection identifier or number, its type, and status such as, <i>Scheduled, Canceled, and Completed.</i>
Inspection details	View the inspection scheduled dates and due dates, the compliance date, the name of the code officer and technician.
Ready for Inspection switch	Turn on if the responsible party has indicated on the Resolve Issue page that the case is ready for an early inspection. The status of the inspection will change to <i>Scheduled – Ready early.</i> For details, see <i>Resolving Issues.</i>
Result	Select to list the result options to choose from. Examples include <i>In Compliance, Remains in Violation, Issue Citation, Mandatory Abatement, Extension</i> among others. The options available are based on the status of the incident. See the Submitting Inspection Results section for more details.
Foldouts	Foldouts contain additional information about the inspection. To access the foldouts, swipe the screen to the left or use the navigation button at the bottom of the page. The available foldouts include Code violations, Comments, Attachments, Time recording, Notices, and Prior Inspections.
Code violations foldout	<p>View a list of code violations associated with the case.</p> <p>On the Code violations page:</p> <ul style="list-style-type: none"> • Click the code violation identifier hyperlink, to view the Code violation details page. This page lists the code violation identifier, the status, summary, description, and corrective actions. You can edit the sections for summary, description and corrective actions. • Click + to add a new violation. The Code violations page lists the status, the code violation identifier, a brief description and the case compliance date. • Click the View all violations link on the Code violations page to access the Violations page for the inspection, which lists all violations along with action buttons for each. <p>The actions that can be performed for each violation record is based on the status it is in. The actions include:</p> <ul style="list-style-type: none"> • Resolve • Remove from case • Edit Complied On Date: Available only for resolved violations. • Edit Comply By Date: Change the date by when the case must ensure compliance. This change won't alter the inspection schedule date.

Page Element	Description
	<ul style="list-style-type: none"> • Reopen <p>Note: For resolved violation records with no fee dues, the Action button is not available.</p>
Comments	<p>View a list of comments related to the inspection.</p> <p>On the Comments page:</p> <ul style="list-style-type: none"> • Click the chevron on a row to open the Comment details page, to edit or delete a comment. • Click + to open the Add comment page. You can enter a comment and format it using the Rich Text Editor option. You can also search and select an existing comment from the Recent, Standard or Favorite comments lists. • Click the View all comments link on the Comments page to view a list of all comments related to the inspection, case or incident. <p>Use the Private switch, to keep comments private and visible only to the agency staff.</p>
Attachments	<p>View a list of attachments related to the inspection.</p> <p>On the Attachments page:</p> <ul style="list-style-type: none"> • Click the Action button to, view details, download, preview or delete the attachment. • Click + Add Attachment to files, documents, or photos. • Click the View all attachments link to view a list of all attachments related to the inspection, case or incident.
Notices	<p>View a list of notices related to the inspection:</p> <ul style="list-style-type: none"> • System-generated notices that are added automatically after the code officer submits the inspection result. • Ad hoc notices that are added by the code officer on this page or added by the code technician from the inspection page in the desktop system. <p>Note: Notices section appears only for inspections in the <i>Completed</i> status. You can also add a notice even when the case is in the <i>Closed</i> status.</p> <p>On the Notices page:</p> <ul style="list-style-type: none"> • Click the notice identifier hyperlink, to view the Notice details page. • Click the + button, which opens the Add ad hoc notice page. You can select a notice from the available ad hoc notices. Click Add Notice to return to the Notices page. • Click the View all notices to view a list of all system and ad hoc notices with their identifiers and statuses. Use the Sort By option to sort notices based on <i>Notice ID</i> or <i>Notice Creation Date</i>. <p>Click the print icon  to print the notice. Once printed, you can't delete the notice.</p>

Page Element	Description
	<p>Note: You can't review and edit a notice when you are adding it from the Code Enforcement Inspection Tasks page. However, notices generated from the Case Overview page and the Code Technician Worklist can be reviewed and edited before printing. For more information, see <i>Working with Notices</i>.</p> <p>Click the Cancel icon to cancel the notice and remove it from the list. This option appears until the notice is printed.</p>
Time Recording	<p>On the Time Recording page:</p> <ul style="list-style-type: none"> Click a time row, to view the Time Recording details page. Click the + button, which opens the New time page. Select the date and time type code and enter the time in the Hours and Minutes fields. For more information, see <i>Adding Time Entries</i>. Click the View all time recordings to view a list of all time recorded by the code officers and technicians related to the inspection.
Prior Inspections	View a list of all previous inspections with the date of inspection and inspection result.

Submitting Code Enforcement Inspection Results

You submit inspection results to complete an assigned inspection on the Inspection Result page in the Oracle Municipal Code Officer mobile application.

To submit the result of an inspection:

1. Select the inspection you want to submit from the **Inspection Tasks** page.
2. On the Inspection page, click the **Result** drop down.
3. Select the desired option from the available list of results.
4. On the **Result Inspection** page include the inspection completion date, and comments or attachments, as needed.

Note: The fields displayed on the **Result Inspection** page are determined by the result option you have selected.

For a complete list of all available fields, see "Sections on the Result Inspection page" in *Reviewing Code Enforcement Inspection Details*.

5. Click the three-dot action menu at the upper right, select **Submit**. An information message appears with an issue number for future reference. Clicking **OK** returns you to the Inspection page. To return to the Inspection Tasks page, click the back button.

The result options you see are determined by the status of the selected incident or case. The following sections list the various status-based outcomes that are available for the submission of inspection result for an incident and case:

Statuses and Result Options Available for an Incident

Status at the time of inspection	Result of the inspection
Inspection	In compliance: The status of the incident changes to Compliance and the inspection is closed.
	<p>Violation: A case is created with a status of Violation and a re-inspection is scheduled, which must be updated by the code enforcement officer.</p> <p>When you update the result as in violation, the incident details page allows you to change the issue type, issue subtype, code violations, address, and issue description. On the incident details page, click the Update button:</p> <ul style="list-style-type: none"> • Search and select the desired issue type and subtype. • Click Next to open the Code Violations page and add code violations. • Click Next to open the Review page, where you can use the Edit icon to make changes to location, issue description, code violations. <p>Note: Additionally, you will see any custom fields that were available at the time of creating the incident.</p> <p>After adding the changes, click Done.</p> <ul style="list-style-type: none"> • Click Submit to create a case with the newly entered details.
	Referral: The status of the incident changes to Referral and the inspection is closed. The referral body that is configured on the Referral Body page is used for the referral incident.
	Closed: The inspection and the incident are closed.

Statuses and Result Options Available for a Case

Status at the time of inspection	Result
Violation	In compliance: The status of the case changes to Compliance and the inspection is closed.
	<p>Remains in Violation:</p> <ul style="list-style-type: none"> • The status of the case remains unchanged. The new compliance date is calculated based on the inspection completion date and the time rule set up. See Setting Up Time Rules. • A new inspection is scheduled, which can be updated by the code officer. • A notice is created, which must be updated by the code officer before printing it. <p>For time rule calculations related to compliance due dates, see the section Compliance Date Calculations based on Inspection Result in the topic Reviewing Code Enforcement Inspection Details.</p>
	Issue Citation:

Status at the time of inspection	Result
	<ul style="list-style-type: none"> The status of the case changes to Citation and the inspection is closed. The compliance date is extended. A notice is created, which must be updated by the code enforcement officer before printing it. A re-inspection is scheduled, which must be updated by the code enforcement officer.
	<p>Extension:</p> <ul style="list-style-type: none"> The status of the case remains unchanged and the inspection is closed. The compliance date is extended, based on the time rules set up.
	<p>Mandatory Abatement:</p> <ul style="list-style-type: none"> The status of the case changes to Mandatory Abatement and the inspection is closed. The compliance date remains unchanged. The code technician schedules an inspection.
Appeal	<p>In Compliance: The status of the case changes to Compliance and the inspection is closed.</p>
	<p>Extension:</p> <ul style="list-style-type: none"> The status of the case remains unchanged. Any scheduled inspection will remain unchanged, with an option to reschedule it. If no inspection is scheduled, then code officers must manually schedule an inspection. The compliance date must be manually extended by the code officer.
	<p>Not in Compliance:</p> <ul style="list-style-type: none"> The status of the case remains unchanged and the inspection is closed. Code officers must manually schedule an inspection. The compliance date is extended, based on the time rules set up.
Hearing	<p>In Compliance: The status of the case changes to Compliance and the inspection is closed.</p>
	<p>Extension:</p> <ul style="list-style-type: none"> The status of the case remains unchanged. Any scheduled inspection will remain unchanged, with an option to reschedule it. If no inspection is scheduled, then code officers must manually schedule an inspection. The compliance date must be manually extended by the code officer.
	<p>Not in Compliance:</p> <ul style="list-style-type: none"> The status of the case remains unchanged and the inspection is closed. Code officers must manually schedule an inspection. The compliance date is extended, based on the time rules set up.
Legal	<p>When a case status is Legal, the case is transferred to the legal department.</p> <p>In Compliance: The status of the case changes to Compliance and the inspection is closed.</p>

Status at the time of inspection	Result
	<p>Extension:</p> <ul style="list-style-type: none"> The status of the case remains unchanged. Any scheduled inspection will remain unchanged, with an option to reschedule it. If no inspection is scheduled, then code officers must manually schedule an inspection. The compliance date must be manually extended by the code officer.
	<p>Not in Compliance:</p> <ul style="list-style-type: none"> The status of the case remains unchanged and the inspection is closed. Code officers must manually schedule an inspection. The compliance date is extended, based on the time rules set up.
Citation	<p>In Compliance: The status of the case changes to Compliance and the inspection is closed.</p>
	<p>Remains in Citation: The status of the case remains unchanged. The new compliance date is calculated based on the inspection completion date and the time rule set up. See <i>Setting Up Time Rules</i>.</p> <p>A new inspection is scheduled, which can be updated by the code officer.</p>
	<p>Issue Citation:</p> <ul style="list-style-type: none"> The status of the case remains unchanged and the inspection is closed. The compliance date is extended, based on the time rules set up. A notice is created, which must be updated by the code enforcement officer before printing it. A re-inspection is scheduled, which must be updated by the code enforcement officer.
	<p>Mandatory Abatement:</p> <ul style="list-style-type: none"> The status of the case changes to Mandatory Abatement and the inspection is closed. The compliance date remains unchanged. The code technician schedules an inspection.
	<p>Extension:</p> <ul style="list-style-type: none"> The status of the case remains unchanged and the inspection is closed. The compliance date is extended, based on the time rules set up.
Mandatory Abatement	<p>Abatement Complete: The status of the case remains unchanged and the inspection is closed. The code technician should update the case status and schedule an inspection.</p>
	<p>Abatement Incomplete: The status of the case remains unchanged and the inspection is closed. The code technician should update the case status and schedule an inspection.</p>

9 Managing Cases

Security Details for Managing Cases

This topic describes important security roles, requirements, or considerations specific to managing cases.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Code Enforcement Case Inquiry Duty	View Code Enforcement cases, notices, fees, hearings, and appeals.	PSC Agency Staff - All agency users
PSC Code Enforcement Case Management	Manage Code Enforcement cases, notices, fees, hearings, and appeals.	PSC System Administrator PSC Code Enforcement Supervisor PSC Code Enforcement Officer PSC Code Enforcement Technician
Create Standalone Public Sector Case	Create a standalone Public Sector case for Code Enforcement.	PSC Code Enforcement Application Administrator PSC System Administrator
PSC Update Case Comments Added by Others and Self	Update Code Enforcement case comments added by others and themselves.	PSC System Administrator
PSC Delete Case Comments Added by Others and Self	Delete Code Enforcement case comments added by others and themselves.	PSC System Administrator
PSC Delete Case Attachments Added by Others and Self	Delete Code Enforcement case attachments added by others and themselves.	PSC System Administrator
PSC Update Case Attachments Added by Others and Self	Update Code Enforcement case attachments added by others and themselves.	PSC System Administrator
PSC Code Enforcement Application Administrator	Access to add, update, delete, recalculate and pay fees at all times	PSC Cashier PSC Case Fees and Payments Management
PSC Case Fees and Payments Management	Add and update Violation fees. View fee information after violation fees is paid	PSC Cashier
Registered Public User	Access to pay fee dues on Case Summary card to which the user has online access.	

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Code Enforcement Responsible Party	Online access to the case. Access to pay fees.	PSC Registered Public User PSC Custom Registered Public User
PSC Case Code References Management	Case Code References Management Assess fees for Code Violations.	PSC Code Enforcement Application Administrator PSC Code Enforcement Case Management PSC Code Enforcement Officer PSC Code Enforcement Technician PSC System Administrator

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).

Reviewing and Claiming Cases

A case is created when an inspection results in a code violation or citation. Agency staff can create a case directly, without an incident being reported. Code enforcement technicians use the worklist to view a list of unassigned cases and claim them as necessary.

Code enforcement technicians have two options for reviewing and claiming cases:

- Viewing a case summary on the Code Technician Worklist page and then clicking the **Claim** button. The code technician claiming an incident is by default the assigned technician for the case. This option is used for claiming a new case created directly — without a reported incident.
- Using the Case Overview page to directly update the **Technician Assigned** field. Although this option is always available, it's most useful for reassigning the case to another technician.

Reviewing and Claiming Cases Using the Code Technician Worklist

- From the agency springboard, click the **Code Technician Worklist** tile.
- Select the Unassigned Cases tab. This page lists all the unclaimed cases in the system.
- Review the following summary information about the case:

Page Element	Description
Case	This column displays: <ul style="list-style-type: none"> The case ID that is assigned based on the agency's autonumbering rules.

Page Element	Description
	<ul style="list-style-type: none"> The issue type and subtype, separated by a hyphen.
Creation Date	Displays the date on which the case was created.
Location	Displays the location of the issue.
Issue Description	Displays the description of the case
Case Status	Displays the status of the case, for example, <i>Compliance</i> , <i>Violation</i> , <i>Citation</i> , and so on.
Comply by	Displays the last date to ensure compliance.

4. If necessary, review the complete details for the case.
 - a. Click the **View More Details** icon to access the Case page.
 - b. On the Case page, review the information on the Overview, Details, Inspections, Notices, and other tabs. See *Navigating to Case Details*.
 - c. Click the **Back** icon in the banner at the top of the page to return to the worklist, and re-navigate to the Unassigned Cases tab.
5. Click the **Claim** button to claim the case.

Claiming a case makes you the assigned technician. As the assigned code technician, you are now responsible for processing the case.

Reviewing Cases in the Case List

To review cases on the case list:

1. From the agency springboard, click the **Cases** tile.
2. If automatic routing or autoassignment is on, choose which cases to view.

Page Element	Description
Show All Types	<p>This switch is visible to code enforcement technicians and supervisors when automatic routing is enabled.</p> <p>When the switch is off, these users see only their assigned cases and other cases in their area of responsibility, as determined by the issue types and subtype attributes for their job function.</p> <p>When the switch is on, the users can see all cases, regardless of their area of responsibility.</p>
Show All District Types	This switch is visible only to code enforcement officers when autoassignment is enabled.

Page Element	Description
	<p>When the switch is off, these users see only their assigned cases and other cases in their area of responsibility, as determined by the district type attributes for their job function.</p> <p>When the switch is on, the users can see all cases, regardless of their area of responsibility.</p>
Show All Statuses	<p>This switch is visible to code enforcement technicians and supervisors irrespective of whether automatic routing is enabled or not.</p> <p>By default, this switch is turned off, and the list shows only the cases in the <i>Reported</i>, <i>Inspection</i>, <i>Violation</i> statuses. Turn the switch on to show all cases including those in the <i>Closed</i> or <i>Void</i> statuses.</p>

3. Click the **Create Case** button, to create a new case. For details, see [Creating a Case](#).
4. Review the following summary information about cases:

Page Element	Description
Case	The case ID that is assigned based on the agency's autonumbering rules.
Issue Type, Issue Subtype	The issue type and subtype.
Case Status	The case status.
Issue Description	A description of the issue.
Creation Date	The date on which the case was created.
Address, and City	Displays the case address and the case's city.
District Type, and District	Displays the case's district type and district.
Code Technician	Displays the name of the Code Technician, if any, assigned to this case.
Code Officer	Displays the name of the Code Officer, if any, assigned to this case.
Actions	<p>Displays the three-dot actions menu.</p> <p>For information about the actions in the menu, see Processing Incidents.</p>

Page Element	Description

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

5. Click the case row to access the case details page.

To return to the case list, click the **Back** icon in the banner.

For more information about the Case detail page, see *Viewing the Case Detail Overview*.

Reviewing and Claiming Cases on the Case Detail Page

1. Select the **Cases** tile on the Agency Springboard, then click **View More Details** for a specific case.
2. In the **Overview** section of the Case page, search and select a code technician from the **Technician Assigned** field.

Note: The new assignment is saved immediately. You do not need to explicitly save, nor do you have an option to cancel the change.

Updating Status of a Case

Agency staff can update the status of a case to perform other actions based on the transaction status. With this option, agency users with the appropriate access can even update the status of a closed case to reopen and reestablish it with a new status. Once reopened, you can edit or update the case to reassign, claim, or perform other available actions.

Note: The **Update Status** option is available only if your agency has enabled the **Available to Manually Select as New Status** option on the Transaction Status page. If the option is disabled, the case status changes are triggered only by the code enforcement workflow.

You can update a case from either the case list page or the from the Case Overview page.

To update a case from the case list page:

1. Click the **Cases** tile on the agency springboard.
2. On the Cases page, find the case for which you want to update the status.

Note: To search for a case in the *Closed* status, turn on the **Show All Statuses** switch.

3. Click the **Actions** icon in the case row.
4. Select **Update Status** from the menu.
5. In the Update Status pop-up window, select the new status for the case from the available options in the drop-down menu.
6. Enter the reason for the update.
7. Click **Done**.

To update a case from the Case Overview page:

1. Click the **Cases** tile on the agency springboard.
2. On the Cases page, find the case for which you want to update the status.
3. Click the case row to access the Case Overview page.
4. Click the **Edit** icon next to the Case Status field.
5. In the Update Status pop-up window, select the new status for the case from the available options in the drop-down menu.
6. Enter the reason for the update.
7. Click **Done**.

Related Topics

- [Viewing the Case Detail Overview](#)

Processing Cases

Agency staff view information and statuses for all the code enforcement cases they are assigned. You can perform actions such as creating a case and accessing detailed case information from the Cases page.

As agency staff such as a code technician, you can use the Cases page to view a complete list of cases. Go to the list of cases to perform these tasks:

- Manage case activity.
- Create a case.
- Update case status.
- Assign or reassign technicians and officers to cases.
- Access details about case history.

Using the Cases Page


1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system..
2. You can perform these actions to display cases that meet specific criteria:

Page Element	Description
Select Multiple	Click to view check boxes for selecting multiple rows before performing the actions Reassign Code Officer and Reassign Code Technician .
Download	Click the download button to export the case list to a .csv file.
Show all District Types	Enable the switch to show a list of cases from all district types.
Show all Statuses	Enable the switch to show cases with any status.

Page Element	Description
Search	<p>Search by alphanumeric characters on the fields for cases in the list. The cases that meet the search criteria are displayed on the page.</p> <p>When you search on dates, use this format: MM/DD/YYYY.</p>
Filter By	<p>Apply filters to display cases that contain the selected parameter values in the list. Click the filter button to open the filter options, where you can define, modify, and save your own filters.</p> <p>You can use the predefined filters <i>Case</i>, <i>Creation Date</i>, <i>Issue Description</i>, <i>Case Status</i>, <i>Comply By</i>, <i>Assigned Code Officer</i>, and <i>Technician Assigned</i>.</p> <p>Case filter is not available in the worklist.</p>
Sort By	<p>Select an option to sort the cases in the list by these fields:</p> <ul style="list-style-type: none"> ○ <i>Case</i> ○ <i>Creation Date</i> ○ <i>Location</i> ○ <i>Issue Description</i> ○ <i>Case Status</i> ○ <i>Comply By</i>
Display Settings	<p>Agency staff can personalize expanded grids to suit their own preferences for working more effectively. For more information, see Personalizing Grid Displays</p>

Managing Case Activity

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system..
2. On the Cases page, you can locate the basic information about the case using the following information:

Page Element	Description
	Click to select one or more cases using the check boxes next to case records.
Reassign Code Officer	Click the button to open the Reassign Code Officer page and select a code officer that you want to assign the selected cases. For details, see the next section.
Reassign Code Technician	Click the button to open the Reassign Code Technician page and select a code technician that you want to assign all the selected cases. For details, see the next section.

Page Element	Description
Create Case	<p>Click to create a new case.</p> <p>This option is not available in the Code Technician Worklist — Cases page. You must navigate to the Cases page using the Cases tile.</p>
Case	View the case ID, issue type, and issue subtype.
Creation Date	View the date on which the case was created.
Address	View the location of the issue.
Issue Description	Review the description of the case.
Case Status	<p>View the status of the case, for example, <i>Closed</i>, <i>Compliance</i>, <i>Violation</i>, <i>Void</i>, <i>Mandatory Abatement</i> and <i>Legal</i>.</p> <p>For details about the options, see Viewing the Case Detail Overview.</p>
Comply by	View the last date to ensure compliance.
Technician Assigned	View the name of the code technician currently assigned to the case.
Assigned Code Officer	View the name of the code officer currently assigned to the case.
Actions	<p>Click to perform actions:</p> <ul style="list-style-type: none"> ○ <i>Update Status</i>: Click to open the Update Status page and select a new status from the drop-down menu. Click Done after you enter a reason. Depending on the status you select, the workflow stages and their tasks are accordingly updated. The list of transaction statuses along with each of its associated system status are set up by your administrator. See Setting Up Transaction Statuses. <p>Note: The Update Status option is available only if your agency has enabled the Available to Manually Select as New Status option on the Transaction Status page. If the option is disabled, the case status changes are triggered only by the code enforcement workflow.</p> <ul style="list-style-type: none"> ○ <i>Assign/Reassign Code Officer</i>: Click to open a modal page and select the new code officer to assign to the case. ○ <i>Assign/Reassign Code Technician</i>: Click to open a modal page and select the new code technician to assign to the case. <p>Click Save to apply the changes and return to the Cases page.</p>

Page Element	Description

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

Reassigning Code Officers and Technicians

You can change the officers or technicians assigned to a case. Use the Reassign Code Officer and Reassign Code Technician options available on the case record row in the Cases list page and on the Overview page of the case.

Access the Reassign Code Officer page and select a new code officer from the list to assign to the case. You can use the Search option by entering text to filter matching code officer rows.

The Code Officer List tab lists the names of the code officers, their assigned district type, and district.

Turn off the **Show All Code Officers** switch to list only those code officers that match the district type or district of the selected case. If an officer is associated with multiple districts or district types, the record displays a link **Multiple**. Click the link to open the District Information page and view all the associations for the officer.

The History tab lists all the officers previously assigned to the case, with the details of assignment date and time.

Access the Reassign Code Technician page and select a new code technician from the list to assign to the case. You can use the Search option by entering text to filter matching code technician rows.

The Code Technician List tab lists the names of the code technicians with the number of cases assigned to them. Turn off the Show All Code Technicians switch to list only those code technicians that match the issue type or subtype of the selected case.

Note: This check box is available to agency staff with appropriate permissions, only when the Automatically Route Issues option is turned on.

The History tab lists all the technicians previously assigned to the case, with the details of assignment date and time.

Assigning and Reassigning Multiple Cases

You can select multiple cases and assign them to a code officer or technician using the **Select Multiple** option on the Cases page. Click the **Select Multiple** button and use check boxes to select one or more cases to assign or reassign. After selecting the cases, click the **Reassign Code Officer** or **Reassign Code Technician** button to open the Reassign page and select the staff member to assign as explained earlier.

Any active workflow tasks assigned to the previous staff member are automatically reassigned to the new code officer or technician. For more details on workflow task assignments, see *Using Workflow*.

Creating a Case

Agency staff such as a code technician can directly create a code enforcement case when they identify a code violation. Such a case is listed as an unassigned case, among other cases that originated from reported incidents.

To create a case without a reported incident:

1. Select the **Cases** tile on the Agency Springboard.
2. The Cases page lists all cases created out of reported code violations. Click the **Create Case** button.

The availability of this button is determined by your administrator's settings for the **Restrict Direct Case Creation without Incident** feature on the **Agency Information - Agency Features page**:

- o If this option is turned off, the **Create Case** button is available for all code officers to click and record a new violation without a reported incident.
- o If this option is turned on, the **Create Case** action is only available for code officers with the `ADD_STANDALONE_CASE_PRIV` privilege. The button is not available for users without this privilege.

See [Setting Up Agencies](#).

3. On the *Select an Issue Type* page, select the type and subtype of the issue you want to report for the code violation.
4. On the *Provide the Location of the Issue* page, enter the location details or use the map to locate the address for which you are reporting the violation. Click **Next**.
5. On the *Tell Us What's Going On* page, enter the description of the issue you are reporting. You can also attach a photo, video, or an audio file as reference. Click **Next**.
6. On the *Just a Few More Questions* page, enter additional information such as indicating whether the issue poses a health hazard or public safety risk. Click **Next**.

The fields on this page are configured by the agency administrator who creates the intake form for the issue subtype. For more information about the issue intake form, see [Using the Intake Form Designer for Code Enforcement](#).

7. On the Code Violations page, click **Add**. Select one or more code violations from a list of current or other violations and click **Done**. Click **Next**.
8. Review the information you entered on the Review page and click the **Submit** button.

You will see the case transaction is now listed in the Cases page. This unassigned case transaction will now be listed in the Unassigned Cases tab in the Code Technician Worklist. A code technician should claim the case from the worklist and proceed for further processing.

See the next session for the case related pages and their descriptions.

Navigating to Case Details

You find detail pages in a collection that consolidates all aspects of a code enforcement case, including property information, inspections, case information, responsible parties, citations, fees and payments, case history, and more.

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

To access the case detail pages:

1. Select the **Code Officer Worklist** tile on the Agency Springboard and select the Assigned Cases tab.

Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.

2. The Cases page lists all the cases assigned to the logged in technician, including the auto-assigned ones. Turn on the **Show All Cases** switch to view all the cases in the system.

Locate the case you are working with and click the **View More Details** button on the case row.

3. Navigate to case information using the links in the left panel.

The information for a case comprises these pages:

Page Name	Description
Overview	View the information highlights regarding the selected case with links to more detail. See <i>Viewing the Case Detail Overview</i> .
Timeline	View all the Code Enforcement events associated with a particular case in a chronological order. See <i>Working with Case Timeline</i> .
Property Information	View parcel data from the case and a map of the parcel location. See <i>Working with Case Property Information</i> .
Workflow	View the workflow status of each task as defined by the agency in OCI Process Automation. See <i>Using Workflow</i> .
Inspections	View a list of inspections scheduled for the case. You can also schedule inspections from this page. See <i>Working with Code Enforcement Inspections</i> .
Notices	View a list of notices sent for the selected case. You can also generate notices from this page. See <i>Working with Notices</i> .
Communication	View a list of correspondence regarding the progress of cases. See <i>Working with Communications</i> .
Case Information	The Case Information is a collapsible menu containing the pages for Case Details, Code Violations, Comments, Attachments, Appeal and Hearings.
Case Details	View a summary of the case activity.
Code Violations	View a list of code violations related to the case. You can also add additional code violations from this page. See <i>Working with Code Violations</i> .
Comments	Review or add comments pertaining to this case.

Page Name	Description
	See <i>Working with Comments</i> .
Attachments	View a list of files and upload or download documents on this page. See <i>Working with Attachments</i> .
Appeals and Hearings	View a list of appeals and hearings that are raised for the case. See <i>Working with Appeals and Hearings</i> .
Responsible Parties	View the details of the party responsible for the violations leading to the case. You can also add a responsible party from this page. See <i>Adding Responsible Parties</i> .
Citations	View a list of citations issued for the case. You can also issue citations from this page. See <i>Working with Citations</i> .
Fee and Payments	Review citation fees assessed and payments due.
Related Transactions	Establish relationships between transactions and then perform actions such as viewing the related transaction applications.

Viewing the Case Detail Overview

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

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

As agency staff, you can use the Overview page to set the status of the case, assign officers and technicians to the case, indicate that the case is ready for early inspection, update the issue description, and change the priority of the case.


Using the Overview Page

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click the case row to open the case you are working with.

- On the Overview page, review important information about the selected case in separate sections. Click the **View Details** link to navigate to the page.

Note: Only those sections that contain data records to show are displayed in the overview page.

Review details or enter the following information in the **Overview** section:

Page Element	Description
Case Status	<p>Review the case status, which is updated by Workflow.</p> <p>To manually change the status of the case, click the Edit link to open the Update Status page, select a new status value, and enter a reason for the change. Click Done. Depending on the status you select, the workflow stages and their tasks are accordingly updated.</p> <p>For details see the Updating a Case Status section later in this topic.</p> <p>The list of transaction statuses along with each of its associated system status are set up by your administrator. See <i>Setting Up Transaction Statuses</i>.</p> <p>Note: The Update Status option is available only if your agency has enabled the Available to Manually Select as New Status option on the Transaction Status page. If the option is disabled, the case status changes are triggered only by the code enforcement workflow.</p>
Code Officer	<p>Assign an inspector to the case by using the Edit link.</p> <p>Click the Edit link to open the Assign an Officer modal page. Use the Show All Officers switch to view a list of officers available for the District type and District assigned to the case. Turn off the switch to see only the inspectors assigned to the case. Click Save to return to the Overview page.</p> <p>Any active workflow tasks related to the case are automatically assigned to the newly selected code officer.</p> <p>For details, see the section Reassigning Code Officers and Technicians under <i>Processing Cases</i>.</p>
	<p>Click the icon to open a modal page that lists all the code officers previously assigned to the case, with the details of the assignment date and time.</p>
Code Technician	<p>Assign a technician to the case by clicking the Edit link.</p> <p>The Reassign Code Technician page lists only the technicians that are associated with the issue type and subtype for this case. Select the Show All Technicians check box to list all the technicians. Click Save to return to the Overview page.</p>

Page Element	Description
	<p>Note: This check box is available to agency staff with appropriate permissions, only when the <i>Automatically Route Issues</i> option is turned on.</p> <p>Any active workflow tasks related to the case are automatically assigned to the newly selected code officer.</p> <p>Technicians can claim cases from the code technician worklist. To access the code technician worklist, select Code Technician Worklist on the Agency Springboard and click the Unassigned Cases tab. See <i>Using the Code Technician Worklist</i>.</p> <p>For details, see the section Reassigning Code Officers and Technicians under <i>Processing Cases</i>.</p>
Issue Description	Review the description of the issue. To update the description, click the Edit link to open the Update Issue Description page and change the description text. Click Done .
Comply By	<p>Review the date by which the case must ensure compliance, which is calculated based on the time rules set up by the agency. If there is no comply by date recorded, the page shows the Add button. You can click to open the Update Compliance Date page and enter the comply by date.</p> <p>For details on updating compliance date, see the Updating Compliance Date section later in this topic.</p>
Appeal By	<p>Indicates the last date by which a user is allowed to submit an appeal for the case.</p> <p>An Edit link is available for a supervisor to change the appeal due date. Click the Edit link to open the Update Appeal by Date page, use the calendar to select a new date, and enter a reason for the update. Click Done.</p> <p>Note: The Edit link is displayed only after the compliance date is set.</p>
Case Reported Date	Review the date on which the incident was reported.
Complied On	Displays the date on which the case was moved to compliance.
Closed On	Displays the date on which the case was closed.
Reason for Closing	Displays the reason entered when the case was closed.

Page Element	Description
Priority	Indicates the priority of the case. To update the priority, click the Edit link to open the Update Case Priority page, select the switch, and use the calendar to select a new compliance date. Click Done .
<number> days to comply	Review the number of days left to ensure compliance.

- The **Incident Details** section shows the incident ID, reported date, issue type and issue subtype of the incident. Click the incident id link to open the Incident overview page to view details of the incident associated with the case.
- The **Responsible Parties** section has the **Access Number** field which displays a unique identifier generated at the time of case creation. The responsible party must provide the access number at the time of requesting access to their case. See *Resolving Issues*.
- The **Inspections** section has the **Next Inspection Due** field, which displays the next inspection ID and its due date. Click the next inspection ID link to go to the Details page of that particular inspection.

On the Inspection details page, turn on the **Ready for Inspection** switch when the responsible party indicates that the case is ready for an inspection prior to the scheduled inspection date. The status changes to

Scheduled – Ready.

Note: The **Ready for Inspection** switch is available for edit only when the case has a scheduled inspection for violation or citation, and remains until the compliance date is reached.

On the Inspection page, the status changes to *Scheduled*, and indicates that the case is ready for the code officer to inspect.

See *Using the Code Officer Worklist*.

- The **Notices** section shows a summary of notices associated with the case, such as the **Last Notice Sent** and **Pending Notice**. You can see a **Generate** button if there is a notice ready to be generated.
- The **Citations** section shows a summary of citations issued for the case.

Updating a Case Status

To manually change the status of a case:

- Select the **Cases** tile on the Agency Springboard.
- On the Cases page, click the 3-dot action menu, and select Update Status.

Note: The **Update Status** option is available only if your agency has enabled the **Available to Manually Select as New Status** option on the Transaction Status page. If the option is disabled, the case status changes are triggered only by the code enforcement workflow. For more information, see the section Adding Transaction Statuses, in *Setting Up Transaction Statuses*.

You can also click the row for a case you want to access. On the Case Overview page, click the Edit button next to the Case Status to make an update.

- Select a new status, from the drop-down list, and enter a reason for the change.

When you select the new status as *Compliance* or *Closed* with reason as *Compliance*, you can select a complied on date. You can choose any date from the case creation date to the current date.

An **Apply Complied on Date to All Open Code Violations** switch is displayed when the case has at least one code violation associated with it. This switch appears disabled when there are open code violations associated with the case. The disabled switch indicates that all the open code violations associated with this case will also be resolved when the case status is set to *Compliance* or *Closed* with reason as *Compliance*.

4. Click **Done**. Depending on the status you select, the workflow stages and their tasks are accordingly updated.

The list of transaction statuses along with each of its associated system status are set up by your administrator. See [Setting Up Transaction Statuses](#).

Updating Case Comply By Date

Updating the case comply by date impacts all the code violations associated with it. By default, all code violations associated with a case will have the same violation comply by date as the case comply by date. The comply by date of a case can be changed from any of the following pages:

- Case Overview
- Inspection page, see [Working with Code Enforcement Inspection Details](#).
- Update Hearing Decision page, see [Working with Appeals and Hearings](#).
- Code Violation page, see the section on Updating Code Violation Details in [Working with Code Violations](#).

Whenever a change is made on the comply by date from any of these pages, the user can choose to apply the new case comply by date to the violation comply by dates.

To update the comply by date from the Case Overview page:

1. On the Case Overview page, click the **Edit** link next to the Comply By date.
2. On the Update Compliance Date page, select a new date from the calendar.
3. Enter a reason for the change in the Reason field.
4. Review the comply by dates and use the switch to decide whether to apply the updated case comply by date to all open code violations for the case.

Page Element	Description
Apply Updated Compliance Date to All Open Code Violations	Turn the switch on to apply the updated case comply by date to all open code violations for the case.
Earliest of Comply by Dates in Violations	Displays the earliest date among all the comply by dates that correspond to the open code violations for the case.
Latest of Comply by Dates in Violations	Displays the latest date among all the comply by dates that correspond to the open code violations for the case.
Next Inspection Scheduled For	Displays the date for the next scheduled inspection.

Page Element	Description
	Whenever an update is made to the case comply by date, the system automatically updates the next inspection scheduled for date, based on the time rules set. You can also see this change on the Inspections page. See <i>Working with Code Enforcement Inspections</i> . For details on time rules, see <i>Setting Up Time Rules</i> .

5. Click **Done**.

Working with Case Timeline

With case timeline, you can view all the Code Enforcement activities associated with a particular case in a chronological order. You can drill down for additional information for each event or filter the timeline to show by event types.

The Case Timeline shows a list of code enforcement case events in a chronological order with the newest on top. The event types include:

- Incident reported
- Inspection
- Case created
- Case updated
- Appeal
- Hearing
- Fee paid
- Notice

Viewing a Case Timeline

The Timeline page shows the list of all the time-based events for the case. You can view the case timeline and perform actions on the Timeline page.

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click the row for the case you want to access.
3. Click **Timeline** in the left panel to open the list of case events.

Page Element	Description
Filter button	Filter the cases based on event types, such as, All, Appeal, Case created, Hearing, Case updated, Inspection, Notice, Fee paid and Incident reported .
Print button	Print a copy of the current timeline.
Download button	Download the case events to an Excel spreadsheet.

Page Element	Description
Show List View button	Display the case events in a list view. The details displayed include the date and time, the event type, case status, name of the agent who created or updated the event, and the reason or description of the event. Click the chevron at the end of each row to go to the Case Overview page.
Show Timeline View button	Display the case events in a horizontal timeline view. The date range is set to start from 30 days before the initial event and to end 30 days after the last event.

Working with Case Property Information


Property information shows the location details of the property that is associated with the case. The information includes the parcel ID, address of the property, the name of the property owner and the district details. You can change the property using a search, or update the existing property details using the edit option.

Viewing Parcel Information

You view the parcel associated with this case on the Property Information page. You can also view the parcel location on a map.

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the row for the case you are working with.
3. Select the Property Information tab in the left panel to open the detail view of the property.

Page Element	Description
Reported Address	View the address from which the incident was reported. This address cannot be modified.
Case Address	View the address of the property associated with the case. If the case address exists in the system, click the link to access the parcel details page to view more information. This address can be updated by the agency staff. <div style="border-left: 2px solid orange; padding-left: 10px;"> <p>Note: A condition icon is displayed near the Case Address if the address associated with the case has a condition applied to it. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p> </div>
Parcel ID	View the parcel ID of the property associated with the case. If the parcel ID exists in the system, click the link to access the parcel details page to view more information.

Page Element	Description
	<p>Note: A condition icon is displayed near the Parcel ID if the parcel associated with the case has a condition applied to it. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p>
	Click the Edit icon next to Case Address and Parcel ID , to view a snapshot of the corresponding data. Agency users with the required access rights can also edit this information.
Owner	View the name of the owner of the property associated with the case.
District Type	<p>Identifies the code enforcement district type for the case. For example, cases might be associated with a fire prevention district type.</p> <p>The district type is inherited from the issue subtype. If the field is blank because the issue subtype doesn't have a district type, you can manually select one.</p>
District	<p>Confirm or update the specific district where the case is located. This district is based on the district type and the issue location:</p> <ul style="list-style-type: none"> ○ With GIS integration, the system finds the district using the GIS map layer that is associated with the district type. ○ If the agency doesn't use GIS integration, the system looks for the code enforcement district that is associated with the parcel. ○ If the system is unable to determine the district, you can manually enter one. <p>The district determines the default code officers for the case. Code officers are assigned to specific districts using the Code Enforcement Districts attribute of the Code Enforcement Officer job function.</p>

Changing Property

You can change the property associated with the case on the Property Information page.

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click the row for the case you are working with.
3. In case details, select the Property Information tab in the left panel to open the detail view of the property.
4. On the Property Information page, click the **Select from Parcel** button.
5. On the Search Property page, search a new parcel and click **Select**.

You can also search for properties using the filters for address, parcel number or name of the owner.

Updating Property Address

You can update the parcel address associated with the case on the Property Information page.

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click the row for the case you are working with.
3. In the case details, select the Property Information tab in the left panel to open the detail view of the property.
4. On the Property Information page, click the Edit button.
5. On the Update Property Information page, you can enter new values for the address, city, and state. Click Done.

Viewing Cases Associated with a Parcel

Agency staff can view summary of cases that are associated with a parcel on the Transactions page, Cases tab.

For more information, see [Viewing Transactions Associated with a Parcel](#).

Using Workflow

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

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

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

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

Security Details for Using Workflow

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

Permit application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Permit Workflow Administration	Administer permits workflows.	PSC System Administrator PSC Permits Supervisor PSC System Administrator

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

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC View Hidden from Public sections in the Permit Applications	View hidden from public sections in the permit and planning detail form.	PSC Agency Staff - All agency users
PSC Add Comments to Permit Workflow Task assigned to anyone	Add comments to permit workflow task assigned to anyone	PSC System Administrator
PSC Add Comments to Permit Workflow Task assigned to self	Add comments to permit workflow task assigned to self	PSC Permits Workflow User Duty

Planning application

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

Code Enforcement

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

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).

Workflow and Non-Workflow Tasks

Workflow tasks are defined in workflow process definitions within OCI Process Automation. Agency staff manages these tasks using the Workflow page in the transaction details of a business license, permit, planning application, and code enforcement – incident or case page.

Oracle provides an additional page that agency staff can use to review both workflow and non-workflow tasks. For information about this functionality, see [Managing Tasks](#).

Note: You can view the workflow information for applications currently being processed as well as completed applications, if needed.

Managing Workflow Tasks

Use the Workflow page to see past and current workflow tasks and to manage task assignments, status, priority, and comments. The Workflow page offers a two-panel view and a list view.

The list view is display-only and visible to both agency staff and registered public users. The two-panel view is for agency staff only.

Managing Workflow Tasks in Code Enforcement

For Code Enforcement – Incident and Case, the Workflow pages give a two-panel view which can further be toggled between a stage view and a milestone view.

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

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

Workflow Task Assignment Changes with Reassignments

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

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

Using the Two-Panel View in Workflow for an Application

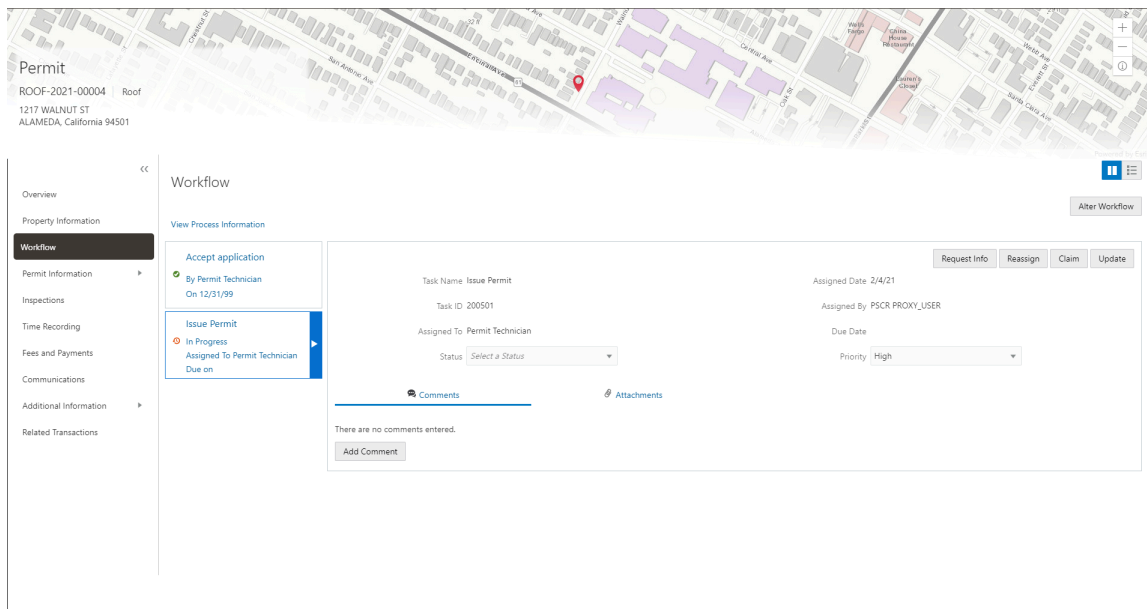
To manage workflow tasks in a two-panel view:

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

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

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

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



Panel	Description
Task summary cards on the left.	The left panel lists completed and in progress tasks. Each task appears on a card that lists the following information: <ul style="list-style-type: none"> ○ Task name ○ Task status

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

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

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

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

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

Page Element	Description

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

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

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

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

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

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

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

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

For example, in a delivered sample workflow, approving a permit application triggers an update to the permit status, which triggers an email to the applicant. The workflow then reaches a decision point that checks whether a plan review is required. The next human step in the process is either completing a plan review or, if no review is required, issuing the permit.
- o Refreshes the Workflow page, which becomes read-only if the task is complete. Processing time can vary.

Using the Stage View or Milestone View in Code Enforcement

The Code Enforcement – Incident and Case Workflow pages display in a two-panel view, with a Task panel and Task Details panel. With Code Enforcement, the underlying process definition differs from the type used for permits or planning applications. A process definition used for Code Enforcement is a *dynamic* process definition based on stages and milestones.

The two-panel view can further be toggled between a stage view and milestone view. In the stage view, the agency staff gets a quick indication of the number of stages in the workflow as buttons at the top of the page. You can click a stage to view details in the task panels below.

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

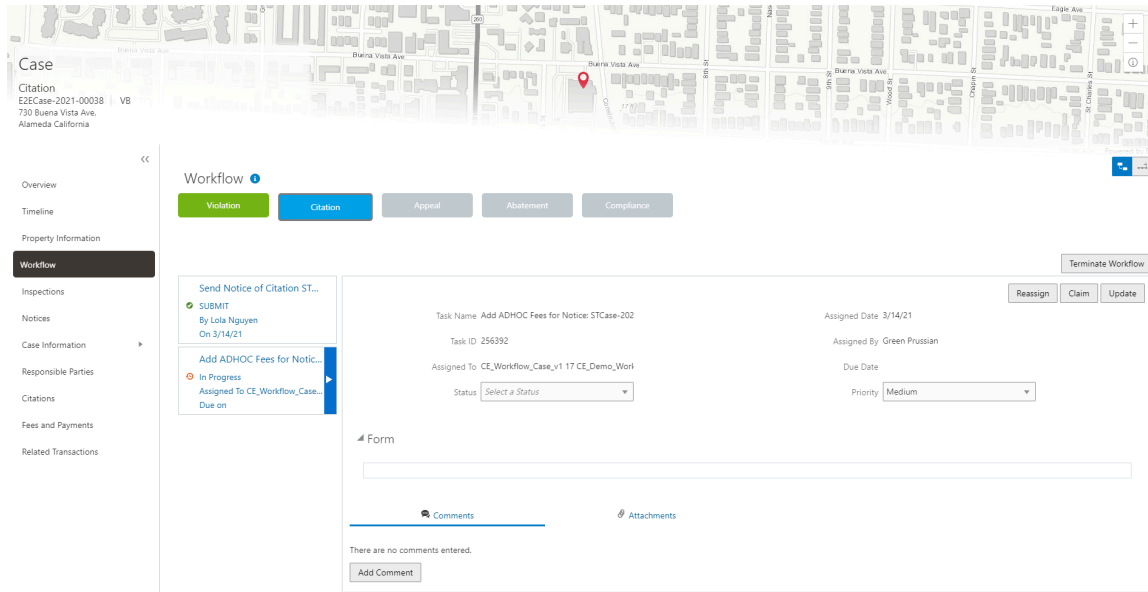
To access Incident or Case Workflow page in the two-panel, stage view:

1. Select the **Incidents** or **Cases** tile on the Agency Springboard.
2. Click the row for the incident you want to view. Or click the **View Details** button for the case you want to view.

3. Use the navigation links in the left frame to select **Workflow**.

By default, the Workflow page for Code Enforcement displays stage view, showing the two-panel view below.

This example illustrates the Code Enforcement – Case Workflow page in a two-panel, stage view.



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

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

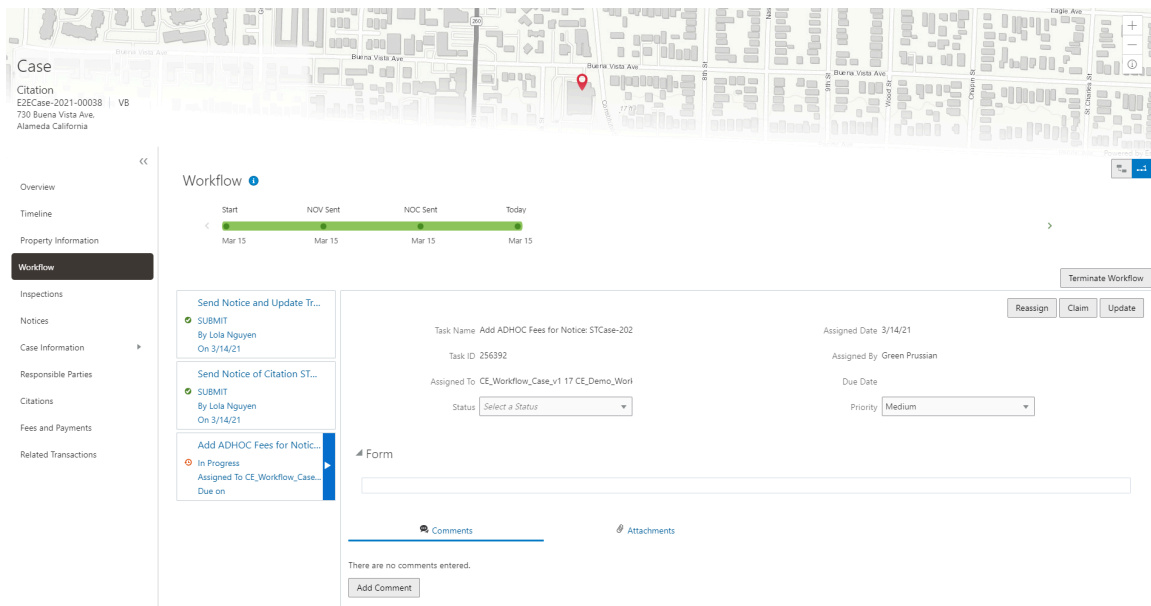
To access the Incident or Case Workflow page in the two-panel, milestone view:

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

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

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

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



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

Using a Form in Code Enforcement – Incident and Case Workflow Pages

Code Enforcement – Incident and Case Workflow pages have an option to include a form or a checklist in the Task Details panel. The agency can customize the form for their specific requirement.

An example of an incident task having a form can have the following checkpoints for the agency staff:

- Check if Repeat Offender
- Send Courtesy Notice

An example of an abatement task having a form can have the following checkpoints for the agency staff:

- Schedule Inspection Post Abatement
- Add Fee
- Send Notice

Adding Comments to a Workflow Task

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

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

To add a comment to a task:

1. Access the workflow task.
2. Click **Add Comment**.
3. To write a new comment from scratch, enter and format your comment in the rich text field on the page.

4. To create a new comment based on one or more existing comments:
 - a. Click **Select Comments**.
 - b. On the Select Comments page, click **Favorite**, **Standard**, or **Recent** to see the corresponding list of comments.
Favorite, standard, and recent comments are described in the topic *Working with Comments*.
 - c. Locate and select the comments you want to copy, using the search and filter options as needed.
 - d. Click **Insert** to copy the text of the selected comments into the field for the new comment.
 - e. If necessary, modify the copied text.
5. If you want to hide the comment from public users, click the **Hide from Public** icon to toggle the visibility setting.
When the icon displays an open lock, the comment is visible to the public. This is the default setting for new comments.
When the icon displays a closed padlock, the comment is hidden from the public.
6. Click **Save** to save the comment and return to the Workflow page.

Modifying a Comment in a Workflow Task

To modify a comment:

1. Access the workflow task.
2. Click an existing comment to view it on the Comment page.
3. Modify the text of the comment as needed.
If you use the **Select Comment** option to add text from an existing comment, the new text is added after any existing text.
4. To modify the comment visibility, click the **Hide From Public** icon.
Clicking the icon toggles the setting. When the icon displays an open lock, the comment is visible to the public. When the icon displays a closed padlock, the comment is hidden from the public.
5. Click **Save** to save changes and return to the Workflow page.

Deleting a Comment from a Workflow Task

To delete a comment:

1. Access the workflow task.
2. Click an existing comment to view it on the Comment page.
3. Click the **Delete** icon.
The comment is deleted, the window closes, and you return to the Workflow page.

Managing Attachments for a Workflow Task

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

To manage attachments for a workflow task:

1. Access the workflow task.

2. Click the **Attachments** link to display attachments information.

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

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

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

4. To view or modify attachment information:
 - a. Click the **Actions** icon for the existing attachment.
 - b. Select **View Details**.
 - c. On the Attachment page, review the **File Name**, **File Size**, and the **Last Updated By** and **Uploaded By** user names.
 - d. Optionally update the **Description**.
 - e. Click **Save** or **Cancel** to return to the Attachments page.
5. To download a file, click the **Actions** icon and select **Download**.
6. To delete a file, click the **Actions** icon and select **Delete**.

You are prompted to confirm the deletion.

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

Requesting Additional Information

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

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

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

Note: The agency staff can request more information at different stages of the workflow by configuring the **Request Info** and **Accept Info** drop-down lists. After you request information, the workflow task is paused and resumed only when the information is accepted using the **Accept Info** option. You will also have an option of sending an e-mail to interested parties when these options are selected for more information. Whether these options are enabled depends on the configuration of your system. For more information on how to configure custom properties to get the drop-down lists for Request Info and Accept Info, see [Using Custom Properties](#).

Viewing the Overall Workflow (List View) for an Application

Use the list view on the Workflow page to view all of the workflow tasks that a human must perform for a specific permit or planning application. This list does not include system tasks such as updating the application status and sending automated notifications.

The list includes completed, in progress, and not started steps. Showing all of these steps together provides a big-picture view of the process. However, some steps that are not yet started might not be applicable depending on the workflow path.

Note: Unlike the two-panel view, the list view is visible to registered public users who access information for their application. The list view is read-only, so public users are never able to update tasks.

To use the list view:

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. Click the row for the permit or planning application you want to view.
3. Use the navigation links in the left frame to select **Workflow**.
4. Click the **Show List View** icon.
5. Review the task list.

The task list displays:

- o The **Task Name** and **Status**.
- o The **Last Updated Date**.
- o The **Days Taken**, which represents the number of days elapsed while the task is in progress.

The value is the number of days so far for an in progress task, or the total days from start to finish for a completed task. This field is blank for tasks that have not started.

- o **Comments**, which displays the two most recent comments.

For each comment, this column displays the creation date and time, the creator, and the comment text. Lengthy comment text is truncated.

6. To review task history, click a specific task to open the Task Details page.

This page lists the dates that the task was updated along with the task status on that date, the number of days taken as of that date, and all comments that were added on that date.

7. Close the Task Details page to return to the workflow list view.

Altering Workflow

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

To alter workflow:

1. Select the **Business License Transactions, Permits**, or **Planning Applications** tile on the Agency Springboard.
2. Click the row for the business license, permit, or planning application you want to view.
3. Use the navigation links in the left frame to select **Workflow**.
4. Click the **Alter Workflow** button.
5. On the Alter Workflow make these changes:

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

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

6. Click **Save**.

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

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

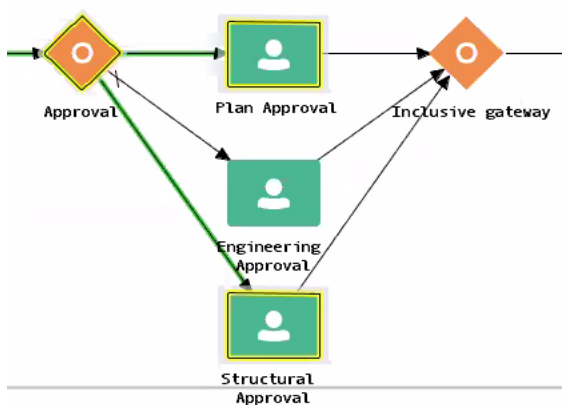
- Do not depend on each other to be completed.
- Can be completed simultaneously.

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

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

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

This example illustrates a workflow process definition with parallel tasks.



This example illustrates the Alter Workflow tab displaying parallel tasks.

Alter Workflow

▲ Plan Approval

New Workflow Activity Name Plan Approval

▲ Structural Approval

New Workflow Activity Name Structural Approval

Update Transaction Status Submitted

Comments

View Workflow Save Cancel

Working with Workflow for Reopened Transactions

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

- Completed
- Expired

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

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

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

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

Workflow

Active workflow - 11/30/21

Active workflow - 11/30/21

Closed workflow - 11/30/21

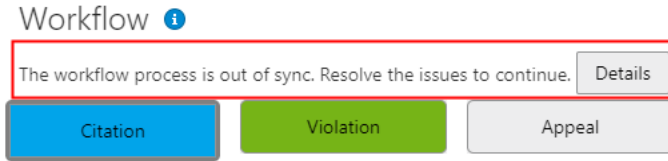
In Progress

Assigned To Permit Technician

Due on

Working with Inconsistent Processes

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



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

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

Working with Code Enforcement Inspections

The case information includes a consolidated list of inspections that are carried out and those that are scheduled for a case. As a code technician you manage inspection activity for a case — including reviewing inspection count, status, assignments, schedule dates, results and more — on the Inspections page.

As agency staff, you use the Inspection list page to view a complete list of case inspections that were carried out and scheduled for future. Access the inspections list in the case details to perform these tasks:

- Review inspection activity recorded by the inspector.
- Perform actions such as scheduling, rescheduling, and canceling an inspection.

Note: As part of the inspection process, an inspector performs inspections, add comments and attachments, and submit a result of the inspection. If the submitted result is Violation or Citation, all the entered details are captured and made available on the Inspections page of the case. The Inspections page can be accessed by the agency staff only on a laptop or a desktop computer. For details on managing inspection on a mobile device, see [Overview of Mobile Oracle Municipal Code Officer](#). For details about managing inspections on a laptop or desktop computer, see [Using the Code Officer Worklist](#).

Viewing Inspection Information

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the case row to open the case you are working with.
3. Click **Inspections** in the left navigation panel of the case details.
4. On the Inspections page, you can view inspection information in these fields:

Page Element	Description
Schedule Inspection	Click to open the Schedule page and use the calendar to select from the dates that the assigned officer is available for an inspection.

Page Element	Description
	<p>Note: This option is available only if there are no pending inspections scheduled. The status of all the inspection schedules must be either Completed or Canceled.</p>
Inspection	<p>View the number of inspections carried out till date for the case.</p> <p>The format of the inspection count is set up by the agency administrator on the Inspection Count page. See Setting Up Inspection Counts.</p>
Count	<p>The count of the inspection such as 1st, 2nd, and so on.</p>
Status	<p>View the status of the inspection:</p> <ul style="list-style-type: none"> ○ Completed ○ Scheduled ○ Canceled
Assigned To	<p>Identifies the officer assigned to the case.</p>
Scheduled Date	<p>View the date on which the inspection is scheduled.</p>
Due Date	<p>View the due date for completing the inspection.</p>
Completion Date	<p>View the date on which the inspection was completed.</p>
Outcome	<p>View the result of the inspection.</p> <ul style="list-style-type: none"> ○ In compliance ○ Not in Compliance: This value is displayed as the result of inspection for a case in <i>Appeal</i>, <i>Hearing</i>, or <i>Legal</i> status. ○ Violation ○ Referral ○ Remains in Violation ○ Issue Citation ○ Remains in Citation ○ Extension ○ Mandatory Abatement ○ Closed

Page Element	Description
	For more information, see Submitting Code Enforcement Inspection Results .
Reschedule button	<p>Click to open the Schedule page and use the calendar to select the next available date for the assigned officer to schedule the inspection.</p> <p>Note: This option is available only for inspections that are not completed.</p>
Cancel button	<p>Click to cancel the inspection schedule.</p> <p>Note: This option is available only for inspections that are not completed.</p>

Viewing Inspection Detail

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the case row to open the case you are working with.
3. Click **Inspections** in the left navigation panel of the case details.
4. On the Inspection page, click inspection ID link for the inspection record you want to view.
5. On the Code Enforcement Inspection page, you can view the details of the inspection included by the officer at the time of inspection.

On the top left of the page, you can view a summary of the inspection, such as its status, inspection ID, and its count (configured by the administrator on the Inspection Count page). You can also see the details of the associated case, such as the case status, case ID and its issue subtype.

View more details of the inspection assigned to you on the page:

- o Inspection status
- o Ready for inspection switch
- o Inspection scheduled date
- o Inspection due date
- o Address
- o Issue description
- o Code Officer
- o Code Technician
- o Comply by date
- o Completion date
- o List of all notices

6. Click the **Update Result** button to view the possible outcomes of the inspection.
 - o **In compliance**
 - o **Not in Compliance:** This value is displayed as the result of inspection for a case in *Appeal, Hearing, or Legal* status.
 - o **Violation**
 - o **Referral**
 - o **Remains in Violation**
 - o **Issue Citation**
 - o **Remains in Citation**
 - o **Extension**
 - o **Mandatory Abatement**
 - o **Closed**
7. Click the **Schedule** or **Reschedule** button to open the Schedule page and use the calendar to select the next available date for the assigned officer to schedule the inspection.
 - o **Note:** This option is available only for inspections that are not completed.
8. Click the **Cancel** button to cancel the inspection schedule.
 - o **Note:** This option is available only for inspections that are not completed.
9. From the Prior Inspections section, you can view all previous inspections for the case. Click a row to view the details of the inspection.
10. From the Incident Detail section, view details of the incident associated with the inspection. Click the Incident ID link to go to the Incident Overview page. For details, see *Working with Incident Details*.
11. On the left panel, there are several tabs which give you access the attachments and comments associated with the inspection.
12. Click Code Violations tab, to view a list of code violations with their status and corrective actions.
13. Close the Inspection Detail page.

Scheduling Inspection

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the case row to open the case you are working with.
3. Click **Inspections** in the left navigation panel of the case details.
4. On the Inspections page, click **Schedule Inspection**.

This option is available only if there are no inspections already scheduled for the case.

5. On the Schedule page, use the **Next Schedule Date** field to select a date from the calendar, which shows only those dates that the assigned officer is available for carrying out the inspection. The Due Date field shows the due date for completing the inspection, which is determined by the time rules set up by your agency.
6. Click **Save**.

The new schedule is listed in the Inspections page and the **Schedule Inspection** button is no longer displayed. The assigned officer receives a notification on their mobile application about the new inspection schedule.

Rescheduling and Canceling Inspection

You can reschedule or cancel an inspection schedule that is not completed.

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the case row to open the case you are working with.
3. Click **Inspections** in the left navigation panel of the case details.
4. To reschedule, click the **Reschedule** button on the inspection row. On the Reschedule page, use the **Next Schedule Date** field to select a date from the calendar, which shows only those dates that the assigned officer is available.
5. To cancel the schedule, click the **Cancel** button on the inspection row.

After you cancel an inspection schedule, you schedule a new inspection using the **Schedule Inspection** option.

Working with Notices

Once a case is created, a corresponding notice object is automatically created and access is made available in the Code Technician Worklist and in the case details. As agency staff, you generate a notice from the notice object, update the various details, review, edit, and print it for dispatch. Agency staff can also manually add ad hoc notices for a case using the Oracle Municipal Code Officer mobile application or from the desktop application.

You can access the notice record using any of the following navigations:

- *Notice of Violation and Notice of Citation* tab:

Agency Springboard > Code Technician Worklist > Notice of Violation and Notice of Citation. The **Generate** or **Continue** option is available in the row. Click **View More Details** if you want to view the complete details.

- *Case Overview page:*

Agency Springboard > Cases. Select the case you are working with. On the Overview page, scroll down to the Notices section. The **Generate** or **Continue** option is available in the row. Click **View Details** if you want to view the complete details.

- *Notices page:*

Agency Springboard > Cases. Select the case you are working with. Select **Notices** in the left navigation panel.

- *Inspection page:*

In the Oracle Municipal Code Officer Mobile application, you can access the Inspection page by selecting an inspection item on the Worklist page.


Note: You can't edit notices when you are adding it from the Code Enforcement Inspection page. However, notices generated from the Case Overview page and the Code Technician Worklist can be reviewed and edited before printing. For more information, see **Generating a Notice** section in this topic.

Viewing Notices

You view a list of notice records for the case citation and violation in the case detail pages.

The **Notices** page shows the list of all notices for the case – including the notices added from the mobile application. You can use the Search option to search for a notice based on its ID or name. View the information and perform actions as described here:

Page Element	Description
Notice ID	View the identifier of the notice.
Notice	View the generated name of the notice, based on the nature of violation.
Type	View the type of notice: <ul style="list-style-type: none"> • Ad hoc • System
Category	View the category of the notice.
Count	View the reference value that determines when the ad hoc notice must be applied.
Case Status	View the status of the case: <ul style="list-style-type: none"> • Violation • Citation
Status	View the status of the notice: <ul style="list-style-type: none"> • <i>Pending</i>: Indicates that the notice object is created. • <i>In Progress</i>: Indicates that details are entered in the notice and saved. • <i>Generated</i>: Indicates that the notice is generated and printed. • <i>Sent</i>: Indicates that the notice has been sent to the responsible party. • <i>Received</i>: Indicates that the notice was received by the responsible party.
Notice Creation Date	View the date on which the notice was created.
Sent Date	View the date on which the notice was dispatched.
Tracking Number	View the tracking number associated with the shipment of the notice.
Actions	Select from available options, which are based on the status of the notice: <ul style="list-style-type: none"> • <i>Generate</i>: Click to open the Generate Notice page and enter details to generate the notice. This option is available only for the notice records in Pending status. • <i>Continue</i>: Click to open the Generate Notice page and complete the details of the previously saved notice. This option is available only for the notice records in In Progress status. • <i>Cancel</i>: Click to cancel the notice. This option is available only for the notice records in Pending or In Progress status. See the section Canceling a Notice

Page Element	Description
	<ul style="list-style-type: none"> Mark as Sent: Click to mark a notice as sent. This option is available only for the notice records in the Generated status.
	<p>Click to open the Edit Notice Details page to enter additional details about the notice, such as tracking details.</p> <p>This option is available only for the notice records that are in Generated, Sent, or Received status.</p>

Creating an Ad Hoc Notice

To manually create an ad hoc notice for a case:

1. Navigate to the notice record using one of the methods listed in the previous section.
2. Click the **Add Notice** button.
3. On the Add Notice page, use the **Category** field to select a category of the notice, which is set up by your agency in the **Ad Hoc Associations** section on the Notice and Report Group page.
4. Use the **Select** button on the notice record you want to add. You can use the Search option to search for and select the ad hoc notice subtype applicable for the case.
5. The Add Notice page closes and the Notices page now lists the new ad hoc notice record.

Generating a Notice

You can generate a notice from the Code Technician Worklist and from case details.

Note: Ad hoc notices can also be generated from the Code Enforcement Inspection page, but these cannot be reviewed or edited before printing.

1. Navigate to the notice record using one of the methods listed in the previous section.
2. Click the **Actions** menu and then select the **Generate** button.

Note: This option is available only for the notice records in Pending status. If the status is in In Progress, you will see the **Continue** option. Use this option in case the notice was generated earlier and saved for later.
3. On the Generate Notice page, the top section shows notice information such as the name, issue type and subtype.

The middle section has the following page elements:

Page Element	Description
Notice	<p>Displays the name of the notice.</p> <p>Before generating a notice, you can change the template of the notice. Click the Change Notice button next to the notice name to open the Change Notice Template modal page. Here, the available notice templates are listed. Click the Select button to change the notice template.</p>
Do you want to edit the notice?	Turn on this switch to download and edit a generated notice.

Page Element	Description
Download and Edit	Click this button to download the generated notice in the rich text format (RTF) or in a portable document format (PDF).
Upload Edited Document	Click this button to re-upload an edited notice either as RTF or PDF.
Review and Print	Click this button to open the generated notice in a new window. You can review the details, print the document, and send it to the responsible party.

Note: The sections below for editing notice details and entering tracking details are displayed only when it is relevant to the notice.

Use the **Edit Notice Details** section for information on:

- *Verify Details:* Enter the compliance date and a description about the violation or citation.
- *Responsible Party and Mailing Address:* The section lists all the responsible parties related to the case. The notice will be sent to all the listed parties. To add a new responsible party, click the **Add Responsible Party** button. On the Add Responsible Party page, you can add a new record by entering the details or you can click the **Select from Parcel Owners** link to search and select an existing parcel owner record. For details, see *Adding Responsible Parties*.
- *Code Violations:* Review the list of code violations. For a notice of violation, the list shows the violations that are in Open status. The notice of citation list shows all the violations in their current status.

Use the **Enter Tracking Details** section to enter the details of the notice shipment such as the sent date, carrier name, tracking number, and any comments.

4. Click **Save Changes**. You can close the window and return to the notice at a later time. You can use the **Continue** button to access this page later.
5. There are two buttons to generate notice on the Generate Notice page: **Generate and Send**, and **Generate**.

Click **Generate and Send**, to generate, as well as send a notice to the responsible party. Here, the status of the notice record changes to Sent. On the Notice Details page, you can see the **Sent Date** of the notice.

Click **Generate** to only generate a notice. Here, the status of the notice record changes to Generated, and the **Sent Date** on the Notice Details page remains blank. You can mark these notices as sent, from the Action menu on the Notice Details page. Once marked as sent, the sent date gets displayed on the Notice Details page.

When the status of a notice record changes to Generated, the record gets removed from the worklist.

You can access the record on the Notices page, which lists all the notices records for the case.

Editing Notice Details

For notices that are in the Generated or Sent status, you can review and update the details.

1. Select **Cases** on the agency Springboard.
2. On the Cases page, click the case row to go to the case you are working with.

3. Select **Notices** in the left navigation panel.

Select a generated notice row that you want to update by clicking the **View Details** button.

Click the **Actions** button, to select an action for the notice. The available actions include, *Generate*, *Continue*, *Mark as Sent*, and *Cancel*.

4. On the Edit Notice Details page, the top section shows the notice details such as name, notice ID, status, type and the notice generated date. You can also see the name of the person who last updated the notice, and the date and time of the last update.

The **Tracking Details** section allows you to enter the details for sent date, carrier name, mailing cost, tracking number, and the received date.

The **Attachments** section allows you to add, view detail, download and delete attachments. Example of an attachment can be a copy of the report that was sent to the responsible party.

If you have multiple attachments, you can select items and download them together.

Note: The status of the notice changes when you enter the dates for the Sent Date or Received Date fields and save the page.

Canceling a Notice

You can cancel a notice when its status is *Pending* or *In Progress*. On the Notices page use the **Cancel** option from the **Actions** menu to cancel the notice. The notice status changes to *Canceled*, and the notice count value reduces by one if it's a system generated notice.

Workflow Impact

When a Notice is canceled, a new task – **Canceled Notice** is created along with the existing open tasks related to the notice. Agency staff review the workflow tasks and take necessary actions such as closing the tasks manually.

Note: The citation object and fees associated with the notice remain unaltered when a notice is canceled.

See *Using Workflow*.

Working with Communications

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

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

Security Details for Working with Application Communications

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

Permit application

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

Planning application

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Associate Planner PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Cashier PSC Principal Planner


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



For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).



Sending Communications

1. Click **Business License Transactions, Permits, , Planning Applications, or Cases** on the Agency Springboard. Select an application on the Transactions page. For Code Enforcement, select a Case. Click **Communications** in the navigation bar.
2. On the Communication Details page, click **Add**.
Agency planners can send their application communication from the My Applications tab. Click the **Planner Worklist** tile on the Agency Springboard and then click the My Applications tab. You send an ad hoc message for an application by clicking the **Actions** menu and selecting **Send Message**.
3. On the Ad Hoc Message page, enter values or click Insert (+) and choose from the list for the following fields:

Page Elements	Definition
Channel Type	Specify what type of ad hoc message you want to send. Values are: <ul style="list-style-type: none"> ○ <i>Email</i>: Generates an email that is sent to users. ○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message. ○ <i>Notification</i>: Generates a notification that appears when users click the notification icon in the application. ○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users. <p>Note: The fields that are available to define on this page vary depending on the channel type and display format that you select.</p>
Visibility	Select which users can see this message listed on the application's Communication Details page. All communications can be viewed by agency staff. Values are:

Page Elements	Definition
	<ul style="list-style-type: none"> ○ <i>Applicant and contacts</i>: Includes agency staff, the applicant, and contacts added to the transaction. ○ <i>Agency staff only</i>: Includes only agency staff. ○ <i>Applicant and Primary Contact</i>:: Includes agency staff and the primary contact on the transaction. <p>Note: This option is presently not applicable for Code Enforcement.</p>
Display Format	<p>Select the format of the message. Values are:</p> <ul style="list-style-type: none"> ○ <i>HTML</i>: Displays rich text, links, and images ○ <i>Text</i>: Displays plain, unformatted text. <p>Note: This field does not appear for the <i>Text</i> channel type.</p>
Create Web Form	<p>Click to access the Web Form modal page where you create a questionnaire that you can insert into your message.</p>
Priority	<p>Turn this switch on to display the notification at the top of the notification list.</p> <p>Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
User Can Delete	<p>Turn this switch on to enable users to delete this notification from their notification lists.</p> <p>Note: This field appears only for the <i>Emails and Notifications</i> and <i>Notification</i> channel types.</p>
Insert Web Form	<p>Click the icon to insert the web form questions into the body of your message along with a link that the recipient can use to access and respond to the questionnaire.</p>
To 	<p>Click the Insert button to view a drop-down menu from which you can search for and select recipients. The display shows the options and the count of values available, which are determined by the transaction you are working with and the channel type you selected in the Message Attributes section.</p>

Page Elements	Definition
	<p>For example, when you select a value here for the email channel type, the email ID is inserted into the field. You can delete the ID using the X icon, but you cannot edit it.</p> <p>Enter the email addresses, user IDs, or phone numbers of the people or organizations that you want to send the communication to.</p> <p>Note: Enter email addresses for emails, user IDs for notifications, and phone numbers for texts.</p> <p>For more information, see Using Attributes in Communication Templates.</p>
<p>Cc and Bcc</p> 	<p>Enter or click + and select the email addresses of the people or organizations that you want to receive a copy or blind copy of the message.</p> <p>Note: These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>
<p>Attachments</p>	<p>Click Add to add an attachment from your local device. After adding an attachment, you can click the Actions icon to view attachment details, download attachments, or delete attachments.</p> <p>Note:</p> <ul style="list-style-type: none"> ○ The maximum number of attachments in a single email is 5.p ○ The maximum total size of an email, including all attachments, can't be more than 10 MB. ○ If the total attachment size exceeds this value, the email will not be sent to the recipients even though it is saved in OPAL communications.
<p>From</p> 	<p>Enter or click + and select the email address, user ID, or phone number of the person or organization who is sending the generated message.</p> <p>For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service.</p> <p>Note: Enter email addresses for the <i>Email</i> and <i>Emails and Notifications</i> channel types, user IDs for the <i>Emails and Notifications</i> and <i>Notification</i> channel types, and phone numbers for the <i>Text</i> channel type.</p>

Page Elements	Definition
<p>Subject</p> 	<p>Enter a brief description of the purpose and content of the message or click + to select attributes to include.</p> <p>Note: This field doesn't appear for the <i>Text</i> channel type.</p>
<p>Message Body</p> 	<p>Enter or click + to select attributes for the main body text of the message.</p> <p>For the <i>Text</i> channel type and emails and notifications with the <i>Text</i> display format, you can enter only plain, unformatted text.</p> <p>For the <i>HTML</i> display format, you can enter rich text, links, and images.</p>

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

4. Click **Send**.

Communicating Using a Web Form

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

Here's how to create a web form:

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

Answer Type	Description
<i>Attachment</i>	<p>Enables the recipient to attach one file per question.</p> <p>For Business License Transactions, recipients can optionally set the attachment to confidential. The availability of the confidential flag depends on the agency-level Enable Confidential Attachments settings.</p>

Answer Type	Description
	<p>After the recipient uploads the file and submits the form, attachments are available in the web form response and on the Attachments page for the application.</p> <p>For Business License Transactions, agency staff can optionally set the attachment to confidential. It will be displayed on the Attachments tab, where they can also change to or from confidential if they have permission.</p> <p>For more information, see Setting Up Agency-Level Options for Business Licenses.</p>
<i>Date</i>	Enables the recipient to answer the question using a calendar to indicate the date.
<i>Text</i>	Enables the recipient to enter text in response to a question.
<i>Number</i>	Enables the recipient to enter a numeric value of up to 13 digits and three decimal places.

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

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

Viewing Application Communications

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

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

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

Click Communications in the navigation bar.

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

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

Working with Code Violations

Agency staff view, add, and manage code violations associated with a case on the Code Violations page. You add one or more code violations to a case based on the specific code used on a violation.

In addition to the code violations included by the system based on the incident issue type, code officers add code violations during their inspection using their mobile device.

Agency staff such as a code technician manage the code violations using the Code Violations page in case details. For more information on mobile inspections, see [Overview of Mobile Oracle Municipal Code Officer](#).

Viewing and Modifying Code Violations

View a list of code violations that were added by the officer and the technician, along with their corrective actions to resolve the violation.

Note: By default, all code violations associated with a case will have the same comply by date as the case compliance date. You can change the code violation comply by dates using the Update Details action on the Code Violations page. For details, see the Updating Code Violation Details section below.

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the row for the case row you want to access.
3. Click **Case Information** and then select **Code Violations** in the left panel to open the list of code violations. The Code Violations page displays an **Add** button, a **Calculate Fine** button and the case comply by date. You can see details on how to add new code violations and calculate fines in the later sections.

Each code violation record displays a summary, code violation status and comply by date. Listed below are the code violation statuses:

- o **Open** – The status of a newly added code violation.
- o **Canceled** – The status of the code violation when the code officer removes the violation record that was added to the case from a previous inspection.
- o **Resolved** – The status of the code violation when the code officer resolves the code violation after confirming compliance.

Once a code violation is resolved, you can also view the date on which it was complied on.

Expand each code violation record to view the description and corrective actions.

- As agency staff, you can use the **Edit** icon to modify the summary and descriptions for violations. You can also modify the description for corrective actions. The Description field enables you to use Rich Text formatting options for the text you enter.

Adding Code Violations

You add code violations to a case using the Select Codes page.

- Select the **Cases** tile on the Agency Springboard.
- On the Cases page, click the row for the case you are working with.
- Click **Case Information** and select Code Violations in the left panel to open the list of code violations.
- Click the **Add** button to open the Select Codes page, search, and select violations. The Selections tab shows the code violations you have selected:

Page Element	Description
Current violation and Other violations	<ul style="list-style-type: none"> Current violation: View a list of code violations associated with the issue subtype that was selected at the time of recording the issue or violation. Other violations: View a list of all the code violations in the system.
Search look-up	<p>Search by entering the name of a specific code violation using the look-up.</p> <p>Select one or more code violations using the check boxes and click Done to include them in the case.</p>

- Click **Done** to add the selected violation to the case and return to the Code Violations page.

Viewing Code Violation History

You can view the history of a code violation associated with a case using the Code Violation History page.

- Select the **Cases** tile on the Agency Springboard.
- On the Cases page, click the row for the case you are working with.
- Click **Case Information** and select Code Violations in the left panel to open the list of code violations.
- Click the **View History** link to open the Code Violation History page.

Page Element	Description
Code Reference ID	The unique identifier of the code violation.
Updated Attribute	The attribute which was updated.
Source	The source from which the change originated. It can be from case, hearing or inspection.
Old Value	The previous value of the changed attribute.
New Value	The new value of the changed attribute.

Page Element	Description
Updated By	Displays the name of the agency user who last updated the code violation.
Last Updated Date	Displays the date on which the code violation was last updated.
Reason for Update	View the reason for the update as added by the agency staff.
Description	View the description regarding the reason for update as added by the agency staff.

Taking Actions on Code Violations

Code technicians use the Actions menu to take actions such as Resolve, Remove from Case, Update Details, and Reopen.

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click the row for the case you are working with.
3. Click **Case Information** and select **Code Violations** in the left panel to show the list of code violations.

Expand the code violation record and click the three-dot **Actions** menu to take any of the following actions:

Element	Description
Resolve	Select to resolve the code violation. You can choose any date from the case creation date to the current date. For details, see the Resolving Code Violation section later in this topic.
Remove from Case	Select to remove the code violation from the case. The status of the code violation changes to Canceled. Note: You cannot delete a code violation from a case. Also note that you cannot remove a code violation that is associated with a citation. When a code violation is removed from a case, all its paid fee items, including the recurring fines, ad hoc and one-time fines, are changed to the <i>Canceled</i> status. For details about deleting code violations from an inspection, see the section <i>Using the Code Enforcement Inspection Page</i> under the topic <i>Using the Code Officer Worklist</i> .
Update Details	Select to update the code violation details, like the compliance date and the rates and fines for the code violation. For details, see the Updating Code Violation Details section below.
Reopen	Select to reopen the code violation from its resolved or canceled status. This option is not available if the case is in one of the statuses – Compliance, Closed, or Void.

Element	Description
	On the Reopen Code Violation page, you can enter a new comply by date for the reopened violation and add comments. This page also lists the case comply by date, and the earliest date and latest among all the comply by dates that correspond to all the open code violations for the case.
Add One-Time Fee	<p>Select to add a one-time fee for the current code violation. All fee items added via this action are included in the Total Fine listed in the Code Violations Update Details page. The Fees and Payments page also includes these fee items under the Total Fees with the current code violation as its reference ID. For details, see <i>Working with Code Enforcement Fees and Payments</i>.</p> <p>This option is not available if the case is in the Canceled status.</p>

Resolving a Code Violation

You can resolve and enter a complied on date for a code violation.

To resolve a code violation:

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click the row for the case you are working with.
3. Click **Case Information** and select **Code Violations** in the left panel to see the list of code violations.
4. On a code violation record, click the three-dot **Actions** menu and select **Resolve**.

Page Element	Description
Code Violation Summary	Displays the identifier for the code violation and its summary.
Comply By	Displays the comply by date of the code violation.
Complied On	<p>Enter a date from the calendar to update the date on which the code violation was complied on. You can choose any date from the case creation date to the current date.</p> <p>Whenever applicable, the earliest and latest comply by dates automatically changes to synchronize with the new comply by date chosen.</p>
Last Updated Date	Displays the date on which the code violation details were last updated.
Case Comply By	Displays the comply by date of the case.
Earliest of Comply by Dates in Violations	Displays the earliest date among all the comply by dates that correspond to open code violations for the case.

Page Element	Description
Latest of Comply by Dates in Violations	Displays the latest date among all the comply by dates that correspond to open code violations for the case.
Next Inspection Scheduled For	Displays the date on which the next inspection is scheduled.

Updating Code Violation Details

You can update the details of a code violation, like the compliance date and the rates and fines associated with it.

To update code violation details:

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click the row for the case you are working with.
3. Click **Case Information** and select **Code Violations** in the left panel to see the list of code violations.
4. On a code violation record, click the three-dot **Actions** menu and select **Update Details**.

Page Element	Description
Code Violation Status and Compliance Dates section Status	Displays the status of the code violation. The values include, Open, Canceled and Resolved.
Comply By	<p>Enter a date from the calendar to update the comply by date for the code violation.</p> <p>Whenever you choose a violation comply by date which is greater or lesser than the current case comply by date, the case comply by date, as well as the earliest and latest comply by dates automatically changes to synchronize with the new dates chosen.</p> <p>When a violation comply by date is set to a previous date, then the case comply by date remains unchanged, but the earliest of comply by dates synchronizes with the new date.</p> <p>When a violation comply by date is extended beyond the case comply by date, then the case comply by and the latest of comply by dates synchronizes with the new date. This is because a case can never have a violation comply by date which is greater than the case comply by date itself.</p>
Complied On	Enter a date from the calendar to update the date on which the code violation was complied on.
Last Updated Date	Displays the date on which the code violation details were last updated.
Case Comply By	Displays the comply by date of the case.

Page Element	Description
Earliest of Comply by Dates in Violations	Displays the earliest date among all the comply by dates that correspond to open code violations for the case.
Latest of Comply by Dates in Violations	Displays the latest date among all the comply by dates that correspond to open code violations for the case.
Next Inspection Scheduled For	<p>Displays the date on which the next inspection is scheduled.</p> <p>Whenever the code violation comply by date is set to be greater than the current case comply by date, the system automatically updates the case comply by date as well as the next inspection scheduled for date, based on the time rules set. You can also see this change on the Inspections page. See Working with Code Enforcement Inspections.</p> <p>For details on time rules, see Setting Up Time Rules.</p>
Rates and Fines section Rate	Enter a rate to calculate the fine for a code violation.
Currency	Displays the currency in which the fine is to be calculated.
Frequency	Select the frequency with which the code violation fine is calculated. The available options are Daily, Weekly and Fixed. This decides whether the code violation fine is calculated on a daily or weekly basis or on a fixed rate.
Total Fine	<p>Displays the total fine as per the rates and frequency.</p> <p>This amount is dynamically calculated from the fee schedule with the mapping source as <i>Code Enforcement Violation Fees</i>.</p> <p>For details, see Setting Up Fee Schedules.</p>
Total Fine Paid	Displays the total fine paid by the responsible party.
Reason section Reason for Update	Select a value from the available drop-down list which specifies the reason for your update.
Description	Add a description to give more details regarding the reason for update.

Page Element	Description

Once the rates and fine are set for a code violation, the system automatically calculates the fine incurred when the code violation extends beyond its comply by date. You can also use the **Calculate Fine** button on the Code Violation page to manually trigger the calculation of the total fine to be paid by the responsible party. See [Working with Code Enforcement Fees and Payments](#).

5. Click Done to complete your update.

Adding a One-Time Fee

You can add a one-time fee for a code violation.

To add a one-time fee for a code violation:

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click the row for the case you are working with.
3. Click **Case Information** and select **Code Violations** in the left panel to see the list of code violations.
4. On a code violation record, click the three-dot **Actions** menu and select **One-Time Fee**.

Page Element	Description
Fee Item	The identifier of the fee.
Amount (USD)	The amount due for the fee. Note: Fee amounts are calculated based on the fee schedule set up on the Issue Subtype page. For more information, see Setting Up Issue Subtypes .
Status	Shows the status of the fee payment. <ul style="list-style-type: none"> ○ Paid ○ Processing Payment ○ Due
Department	The department that calculates the fee amount.
Assessed Date	The date on which the fee was assessed.
Due Date	The date by which the payment must be made.
Comments	Add comments pertaining to this fee item.

5. Click Done to complete adding the one-time fee.

Working with Comments

This topic discusses how to use comments. Agency staff can view, modify, and add comments on the Comments page for a transaction, parcel, contractor license, case, or incident.

Applicants and contacts with application access can view and add comments to their own applications as well as update and delete the comments they added themselves. See the section "Security Details for Working with Comments" for information about setting up security for agency staff, applicants, and application contacts to manage comments.

Security Details for Working with Comments

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

Permits

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Add Comments to Permits	Add comments to permits till they are not closed.	PSC Permits Management with Elevated Access PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Permit Management with Elevated Access	Add comments to permits at all times.	PSC System Administrator PSC Permits Supervisor
PSC Update Permit Comments added by others and self	Update permit comments added by others and by themselves.	PSC System Administrator
PSC Update Permit Comments added by self	Update permit comments added by themselves.	PSC Inspections Supervisor

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

Planning application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	View comments on your own planning applications that are marked as visible to public. Add, update, and delete comments till the application is closed.	PSC Registered Public User
PSC Registered Public User	View comments on your own planning applications that are marked as visible to public. Add, update, and delete comments till the application is closed.	PSC Registered Public User
PSC Add Comments to Planning and Zoning	Add comments to planning applications that are not closed.	PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Planning Application Management with Elevated Access	Add comments to planning applications at all times.	PSC Zoning Administrator PSC System Administrator
PSC Update Planning and Zoning Comments added by others and self	Update planning and zoning comments added by others and by themselves.	PSC System Administrator
PSC Update Planning and Zoning Comments added by self	Update planning and zoning comments added by themselves.	PSC Apply Planning and Zoning Duty PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner

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

Parcels

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

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

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).

Adding Comments

You view, modify, and add new comments on the Comments page. Three categories of comments are available for use:

- *Favorite comments:* Mark comments you use regularly as your favorite and access them easily on the Favorite comments tab
- *Standard comments:* Select and post a comment from a list of pre-defined comments on the Standard comments tab.
- *Recent comments:* Select and post comments from a list of recently posted comments on the Recent comments tab.

Viewing and Modifying Comments

1. Access the detail page for the transaction, parcel, contractor license, case, or incident you are working with.
2. Click the **Comments** link in the left panel to view the Comments page.

You view a list of comments in the right panel.

3. You can modify, delete, or hide a comment from public view only if it was entered by you. Click the specific comment row to open the detail view and make changes.

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

4. Click **Save**.

Adding a New Comment

1. Access the detail page for the transaction, parcel, contractor license, case, or incident you are working with.
2. Click the **Comments** link in the left panel to view the Comments page.
3. Click the **Add Comment** button to open the Add Comment page and enter a new comment.

You can use the **Hide from Public** icon, to hide a comment from public view and also toggle between hide and show.

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

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

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

Adding Favorite, Standard, and Recent Comments

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

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

See *Managing Comments*.

Working with Attachments

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

Attachments provide supporting documentation needed by agency staff when processing transactions or managing records. See the section "Security Details for Working with Attachments" for information about setting up security for agency staff, applicants, and contacts with application access to manage attachments.

You can manage attachments associated with a transaction on different pages in Oracle Permitting and Licensing. Here's a look at some of the areas that include attachment functionality:

- The Attachments page in the transaction or record detail pages, including pages for permits, planning applications, cases, business licenses, and contractor licenses.

- The Workflow page in the transaction detail pages.
- Inspection Detail and Checklist pages in the Oracle Inspector mobile app.
- New Violation and Inspection pages in Oracle Municipal Code Officer.

Recipients of transaction communications containing web forms can upload files when requested. You can also manage documents as part of the plan review process.

These are all sources of attachments that you'll find associated with a transaction on the Attachments page.

For more information about managing attachments for a workflow task, see [Using Workflow](#).

For more information about Oracle Inspector, see [Overview of Mobile Oracle Inspector for Permits](#) and [Working with Inspection Details](#).

For more information about Oracle Municipal Code Officer, see [Overview of Mobile Oracle Municipal Code Officer](#).

For more information about managing attachments associated with a contractor license, see [Managing Contractor License Details](#).

Security Details for Working with Attachments

This section describes important security roles, requirements, or considerations specific to working with attachments for permits and planning applications.

These security roles apply to permit attachments:

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Add and update attachments to submitted permits until they are closed. View all attachments on applications for which the user is the applicant.	PSC Registered Public User
PSC Agency Permits Inquiry	View permit attachments.	PSC Agency Staff – All agency users
PSC Permits Attachments User	Add attachments to permits. Update and delete attachments added by themselves.	PSC Inspections Supervisor PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Apply Permit Duty PSC System Administrator PSC Principal Planner PSC Planning Coordinator

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

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

These security roles apply to planning application attachments:

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

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

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

These security roles apply to business license attachments:

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Add and update attachments on business license applications until they are submitted. View all attachments on applications for which the user is the applicant.	PSC Registered Public User
PSC Administer Public Sector Business License Transaction Confidential Data	Allows users to administer confidential data for business license transactions.	PSC Business License Application Administrator PSC System Administrator PSC Treasury Administrator

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Manage Public Sector Business License Transaction Confidential Data	Allows users to manage confidential data for business license transactions.	PSC Auditor PSC Business Analyst PSC Business License Manager PSC Business License Specialist PSC Treasury Supervisor
PSC Update Business License Attachments added by self	Enables users to update business license attachments added by themselves.	PSC Business License Inspector PSC Business License Manager PSC Business License Specialist PSC Business Analyst PSC System Administrator Application Implementation Consultant PSC System Administrator
PSC Update Business License Attachments added by self and others	Enables users to update business license attachments added by themselves and others.	Application Implementation Consultant PSC System Administrator
PSC System Administrator	Provides PSC product family administration role.	Application Implementation Consultant PSC System Administrator
PSC Agency Business License Inquiry	Allows agency users to view business licenses.	PSC Agency Staff
PSC Access Confidential Business Licenses Data	Allows users to access confidential information in business licenses data.	PSC Auditor PSC Business License Manager PSC Business License Specialist PSC Treasury Administrator PSC Treasury Supervisor Application Implementation Consultant PSC System Administrator PSC Business Analyst
PSC Delete Business License Attachments added by self	Enables users to delete business license attachments added by themselves.	PSC Business License Inspector PSC Business License Manager PSC Business License Specialist

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		Application Implementation Consultant PSC System Administrator PSC Business Analyst
PSC Delete Business License Attachments added by self and others	Enables users to delete business license attachments added by themselves and others.	Application Implementation Consultant PSC System Administrator
PSC View Business License Attachments	Enables users to view business license attachments.	PSC Auditor PSC Business License Inspector PSC Business License Manager PSC Business License Specialist PSC Treasury Administrator PSC Treasury Supervisor Application Implementation Consultant PSC System Administrator PSC Business Analyst

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

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the *Security Reference for Oracle Permitting and Licensing*.

Overview of the Attachments Page

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

The page tabs and elements may vary on the Attachments page depending on the type of transaction or record. For example, the Attachments page for a business license renewal application displays the **Business License, Inspection,** and **All** tabs. Let's take a look at the different available tabs:

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

- The **Permits** tab displays attachments added through the permit's Attachments page and required documents, if set up by your agency.
- The **Inspection** tab displays attachments that building inspectors uploaded in the Oracle Inspector mobile app related to the inspection checklists, inspection checklist items, or overall inspection.
- The **All** tab displays attachments added from all sources, including the Attachments page, the Workflow page, Oracle Inspector, plan reviews, and web form responses.
- The **Agency Uploads** tab displays all attachments added by the agency staff in Code Enforcement. The **Responsible Party Uploads** tab displays the attachments added by registered users while resolving code enforcement issues.

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

Working with Required Documents

The **Required Documents** section appears on the application intake form and here on the Attachments page in the application details, depending on agency setup for business licenses, permits, and planning applications. Your agency adds a document group to the application type and the document group includes document categories that are configured to identify the required documents. See [Setting Up Required Documents](#).

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

Application Step	Description
Submittal (application submittal)	Applicants can't submit the application without adding the specified document first. Only documents required at the Submittal step are required before the applicant can submit the application. If documents were provided on the application intake form, you can view them on the Permits tab on the Attachments page in the application details after submittal.
Issuance (application issuance)	The permit or business license can't be issued without this document. This step doesn't apply to planning applications and validation requires workflow setup.
Acceptance (application acceptance)	Agency staff can't accept this document into the system if this document is missing. Validation at this step requires workflow setup.
Final inspection	Inspectors can't submit the final inspection results without this document. Documents can only be required at this step if your agency uses Permits or Business Licenses. This step doesn't apply to planning applications.
Complete (application complete)	The application process won't be complete until this document has been attached.

Agency staff with permissions can override document requirements to upload files and also remove files. Public users can't delete required documents once they have been uploaded for previous application steps.

Click **Upload** to attach the specified document. The category and subcategory are automatically selected for the document during upload and the file appears in the attachments grid. Once a required document is uploaded, the **Attached** icon appears and a count keeps track of the required and provided documents.

Viewing Attachment Details






To view a list of attachments:

1. Access the detail page for the transaction where you want to view attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. On the Attachment page, view the attachment grids on the different tabs.

Here are the various elements:

Page Element	Description
	<p>Displayed when an applicant uploads a PDF document to a permit or planning application that's in a plan review status. Only Permits or Planning and Zoning agency staff can see the Uploaded Documents icon, which is available on the Permits tab only.</p> <p>The icon is displayed until the document is marked as seen in the Plan Review Console or on the Attachments page, or added to a plan review cycle. The indicator isn't available on phones or in the list view on the Permits tab.</p>
<p>Protected document icons:</p> <ul style="list-style-type: none">  - Edit Protected Document  - Archive Protected Document  - Archive Protected or Protected Editable Document 	<p>Displayed when a protected PDF document is added to an application in the system. The icon displayed depends on how your agency handles protected documents for permits and planning applications. A protected PDF document has any setting that is controlled by a password or is otherwise secured.</p> <p>Note: The system will always prevent you from uploading to an application password-protected documents that require a password to open.</p>
	<p>Click the Select to Preview Attachment icon for PDF files (shown here) or a thumbnail for most types of image files (such as BMP, GIF, JPEG, and PNG) to open the Attachment Preview page.</p> <p>On the preview page, you can see the first page of a PDF document or a larger version of an image file. Attachment preview is available for permits, planning applications, business licenses, code cases, account management, and contractors.</p>
File Name	<p>View the following information in the Filename field:</p> <ul style="list-style-type: none"> ○ Icon indicating the file type ○ Filename with file type extension ○ <i>File Size</i>
Description	View the description of the attachment as entered by the person who added the attachment.

Page Element	Description
<p>Source on the All tab for permits and business licenses</p>	<p>View the source of the attached file. Valid values are:</p> <ul style="list-style-type: none"> ○ <i>Permits</i> ○ <i>Business License</i> ○ <i>Inspection</i> ○ <i>Workflow</i> ○ <i>Plan Reviews</i> <p>Attachments that are added to electronic plan reviews have their source changed from <i>Permits</i> to <i>Plan Reviews</i>. For example, attachments added through the Oracle Inspector mobile app display <i>Inspection</i> in this field.</p> <p>Attachments added to web form questionnaire responses display <i>Permits</i> in this field.</p> <p>Note: This column appears on the All tab for permits and business licenses.</p>
<p>Uploaded By</p>	<p>View the name of the person who uploaded the file along with the date and time when the person uploaded the file. Registered public users see <i>Staff</i> instead of a name.</p>
<p>Source on the Inspection tab for permits</p>	<p>View the associated permit ID and whether the building inspector uploaded the file to an inspection checklist, inspection checklist item, or the overall inspection in the Oracle Inspector mobile app.</p> <p>Note: This column appears only on the Inspection tab for permits.</p>
<p>Reference</p>	<p>View attachment information:</p> <ul style="list-style-type: none"> ○ The checklist description for checklist attachments ○ The checklist item description for checklist item attachments <p>For inspection-level attachments, the field is blank.</p> <p>Note: This column appears only on the Inspection tab.</p>
<p>Category and Subcategory</p>	<p>View the document category for the attachment.</p> <p>The category and subcategory are available when a document group is specified during setup for the transaction type or in the contractor license options.</p>

Page Element	Description
	<p>Note: This field isn't available for case attachments.</p>
Final	<p>Displays Yes when agency staff turn on the Final Document switch on the Attachment Details page for permit attachments.</p> <p>Note: This column appears only on the Permits tab.</p>
Actions	<p>Click the actions icon to select and perform an action:</p> <ul style="list-style-type: none"> ○ <i>View Details</i> ○ <i>Download</i> ○ <i>Delete</i> <p>Note: For permits, the <i>Delete</i> action appears only on the Permits tab. Additionally, the security associated with your user ID may limit which actions are available to you.</p>

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

Adding Attachments

You upload files to the Attachments page using the Add Attachments page. For permits, you use the Permits tab, and for business license transactions, you use the Business License tab. The attachments on the Inspection tab are uploaded by building inspectors in the Oracle Inspector mobile app.

Note: The maximum file size is 150 MB depending on the page that you're uploading to in Oracle Permitting and Licensing. It may take several minutes to upload large files. The maximum file size in the Oracle Inspector mobile app is 25 MB.

To add attachments:

1. Access the detail page for the transaction where you want to add attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. Click the **Add** icon.

4. Select the file to upload in the browser dialog box and click **Open**.

The file name appears on the Add Attachments page.

5. On the Add Attachments page, optionally enter a description of the file.
6. If the **Category** and **Subcategory** fields appear on the Add Attachment page, optionally select a document category and subcategory.

Note: Document category and subcategory are not applicable to case attachments.

The category fields appear if the transaction type is associated with a document group. The document group defines the available values in these fields.

For more information, see the implementation documentation for *Setting Up Document Categories and Subcategories*.

Note: The document group for a transaction is based on the document group that was defined for the transaction type at the time the transaction is saved.

7. Click the **Upload** button.

The Add Attachment window closes, and the newly uploaded attachment appears on the Attachments page.

Updating Attachment Details

You can update attachments that you added on the Permits tab. Agency staff with appropriate permissions can update any attachments on the Permits tab. Attachments can't be updated on the All tab.

Here's how to view and update document details on the Attachment Details page:

1. Access the detail page for the transaction where you want to view attachment details.
2. Click the **Attachments** link in the left navigation panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. In the attachments grid, click the **Action** icon for the document that you want to view.
4. Select *View Details* to open the Attachment Details page.

The details on this page include the information from the Attachments page and information about the file size and the person who last updated the document information.

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

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

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

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

Downloading Attachments

There are multiple ways to download attachments.

To download selected attachments from the Attachments page:

1. Access the detail page for the transaction where you want to download attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. Click the **Select Multiple** icon above the grid.
4. Select one or more documents to download.
5. Click the **Download** icon.

To download a single attachment from the Attachments page:

1. Access the detail page for the transaction where you want to download attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. In the attachments grid, click the **Action** icon for the document you want to download.
4. Select *Download* and save to the location of your choice.

Deleting Attachments

There are multiple ways to delete attachments. The security associated with your user ID determines whether you can delete attachments.

Note: For permits, you can delete attachments only from the Permits tab of the Attachments page. Applicants, contacts with application access, and agency staff can view details and download files from the **Inspection** tab, but only administrators and the inspector who uploaded them can delete them.

To delete selected attachments from the Attachments page:

1. Access the detail page for the transaction where you want to delete attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. Click the **Select Multiple** icon above the grid.
4. Select one or more documents to delete.
5. Click the **Delete** icon.

To delete a single attachments from the Attachments page:

1. Access the detail page for the transaction where you want to delete attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

You may need to expand the section that includes the Attachments link.

3. In the attachments grid, click the **Action** icon for the document you want to delete.
4. Select *Delete* from the action menu.

Working with Appeals and Hearings

Agency staff can request an appeal on behalf of the responsible party, for a violation, citation or abatement that the responsible party has received. The details of the requested appeals, their hearing schedules, and decisions can be seen in the case details — Appeals and Hearings page.

Registered public users can request appeal for their case as a responsible party, using the Resolve Issue page. Permissions to access the case is issued by the agency staff after the user requests access. For information about registered users requesting access and requesting appeals, see [Resolving Issues](#).

Code officers such as a code technician can directly schedule hearings for a case, independent of appeals.

Viewing Appeals and Hearings

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Hearings tab. This page lists only the cases that are appealed, with a hearing schedule. Click **View More Details** for the case row you want to access.

Alternatively, you can access the Appeals and Hearings page by selecting the **Cases** tile on the Agency Springboard. Click **View More Details** for the case you are working with. Click **Case Information** and select **Appeals and Hearings** in the left panel.

2. The Appeals and Hearings page lists all the appeals and hearings for the case:

Page Element	Description
Source	Review the details of the record: <ul style="list-style-type: none"> ○ Source – Appeal or Hearing ○ Responsible Party ○ Date of creation
Hearing Body	Review the name of the hearing body that is assigned to the case hearing.
Hearing Date	Review the date on which the hearing is scheduled.
Hearing Status	View the status of the hearing: <ul style="list-style-type: none"> ○ <i>Not Scheduled</i>: The hearing is not scheduled. ○ <i>Scheduled</i>: The hearing is scheduled. ○ <i>Completed</i>: The hearing is completed with a decision outcome.
Responsible Party	Review the name of the responsible party for the case.
Attachments	View, add, or delete attachments related to the hearing.

Page Element	Description
	<p>A numeric value on the badge shows the number of attachments added. If there are no attachments, no value is shown.</p> <p>Click the icon with the badge to open the Attachments page and view the list of attachment files with the details of description and name of the uploader.</p> <p>The Actions menu allows you to view details, download, or delete attachments.</p> <p>Note: You can delete only the attachments uploaded by yourself.</p> <p>Click the Add button to upload a new attachment. For details, see <i>Working with Attachments</i>.</p>
Actions	<p>Click to view the actions you can perform on the record, which are based on the status of the case – Hearing or Appeal:</p> <ul style="list-style-type: none"> ○ <i>Schedule Hearing</i>: Select to schedule a hearing by selecting a hearing body and an available date. ○ <i>Reschedule Hearing</i>: Select to change the hearing date. ○ <i>Update Hearing Decision</i>: Select to enter the decision made in the hearing and add corrective actions. ○ <i>Cancel</i>: Click to cancel the appeal or hearing.

3. You can also click on an appeal or hearing row to view additional details.

Page Element	Description
Hearing Body	The name of the hearing body that is assigned to the case hearing.
Hearing Date	The date on which the hearing is scheduled.
Hearing Purpose	The purpose for which the hearing is scheduled.
Responsible Party	The name of the responsible party for the case.
Hearing Decision	The decision made on a previous hearing.
Decision Date	The date on which a hearing decision was made.
New Compliance Due Date	The date by which the responsible party must ensure compliance.

Page Element	Description
Apply Updated Compliance Date to All Open Code Violations	View the status of this switch for the appeal or hearing. Note: You cannot turn this switch on or off from this page.
Comments	View any comments regarding the appeal or hearing.
Last Updated By	The name of the person who last updated the appeal or hearing details.
Last Updated Date	The date on which the last update to the appeal or hearing was made.
Appellant	The name of the responsible party.
Appeal Date	The date on which the appeal was made.
Appeal By	The date by which an appeal has to be made.
Appeal Reason	The reason for requesting an appeal.
Attachments	View attachments related to the hearing. The Actions menu allows you to view details on the Attachment Details page or delete the attachment. The Attachment Details page gives you the file name, description, name of the uploader and the date on which the file was uploaded. Note: You can delete only the attachments uploaded by yourself.

Adding an Appeal

You can request an appeal only if there is no active appeal for the case. The time period within which you can request an appeal is determined by your administrator and is set up in the Time Rules page. For more information about time rules, see [Setting Up Time Rules](#).

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click **View More Details** on the case for which you want to request an appeal.

3. Click **Case Information** and select **Appeals and Hearings** in the left panel to open the list of appeals and hearings.
4. Click **Add Appeal**. The Add Appeal page opens.

Page Element	Description
Appellant	View the name of the responsible party.
Appeal Date	View the appeal date, which is the current date.
Case Status	Select the case status for the appeal from the list of available statuses. The list of transaction statuses along with each of its associated system status are set up by your administrator. See <i>Setting Up Transaction Statuses</i> .
Appeal Reason	Enter the reason for requesting the appeal.

5. Click **Save**. The new appeal for the case is created with a case status of Appeal, and any scheduled inspection is canceled.

Adding a Hearing

You can directly schedule a hearing for a case, without an appeal request. To add a hearing:

1. Access the Appeals and Hearings page.
2. Click **Add Hearing** to open the Schedule Hearing page.

Page Element	Description
Appeal Source	View the source of the appeal, which is Hearing
Hearing Body	Select the hearing body from the available list.
Hearing Date	Select a hearing date from the available options, which is determined by the schedules of the hearing body and the agency.
Hearing Purpose	Select a purpose for adding this hearing.
Case Status	Select the case status for the hearing from the list of available statuses. The list of transaction statuses along with each of its associated system status are set up by your administrator. See <i>Setting Up Transaction Statuses</i> .

Page Element	Description
Responsible Party	View the name of the responsible party related to the case.

- Click **Save**. The new hearing for the case is scheduled with a case status of *Hearing*, and any scheduled inspection is now available for reschedule on the Inspections page. If there is no scheduled inspection, then the **Schedule Hearing** button is available. For details, see *Working with Code Enforcement Inspections*. Also, the **Attachment** icon is enabled on the Appeals and Hearings page so that you can add any attachments related to this hearing.

You can reschedule a hearing by changing the date of the hearing. Click the **Reschedule** button available on the hearing record and select the new date of hearing.

The **Reschedule** option is also available on the:

- Code Technician Worklist: On the Hearings tab select Reschedule from the **Actions** menu.
- Code Officer Worklist: On the Hearings tab select Reschedule from the **Actions** menu.

Updating Hearing Decision

After the public hearing is completed and the hearing body announces their decision, the assigned code technician updates the decision in the case details using the Appeals and Hearings page.

- Select the **Code Technician Worklist** tile on the Agency Springboard and click the Cases tab. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Hearings tab. This page lists only the cases that are appealed, with a hearing schedule. Click **Actions** and select **Update Hearing Decision**. You can also navigate using the case list. Select **Cases** on the Agency Springboard to view a list of all cases. On the Cases page, click **View More Details** for the case you are working with. Click **Case Information** and select **Appeals and Hearings** in the left panel to open the list of appeals and hearings.
- Click the **Action** button on the row of the appeal or hearing you are working with and click **Update Hearing Decision**.

Note: This option is not available for a completed appeal row.
- Enter the decision related information on the Update Hearing Decision page:

Page Element	Description
Hearing Body	View the name of the hearing body assigned for the hearing.
Hearing Purpose	View the purpose for which the hearing is held.
Hearing Date	Select an available date for the hearing.
Responsible Party	View the name of the responsible party for the case.

Page Element	Description
Hearing Decision	<p>Select the hearing decision from options set up by your administrator.</p> <p>Examples of decision options can be <i>Compliance</i>, <i>Not in Compliance</i>, <i>Continue</i>, <i>No Outcome</i>, and others.</p> <p>If you select the option related to noncompliance, you must change the status of the case in the New Case Status field.</p>
Decision Date	Enter the date on which the hearing decision was taken.
New Case Status	<p>Select the new status for the case from the list of available statuses. Depending on the status you select, the workflow stages and their tasks are accordingly updated.</p> <p>The list of transaction statuses along with each of its associated system status are set up by your administrator. See Setting Up Transaction Statuses.</p> <p>Note: The Update Status option is available only if your agency has enabled the Available to Manually Select as New Status option on the Transaction Status page. If the option is disabled, the case status changes are triggered only by the code enforcement workflow.</p>
Issue New Notice of Violation	Turn on the switch to issue a new notice for violation, when violation is selected as the new case status.
Case Comply By	Displays the original date by which the responsible party must ensure compliance.
New Compliance Due Date	Select a date by which the responsible party must ensure compliance. This option appears if the new status of the case is violation, citation or abatement.
Apply Updated Compliance Date to All Open Code Violations	Turn on the switch to apply the new case compliance due date to all open code violations for the case.
New Citation Due Date	Select a date by which the responsible party must pay the citation fee. This option appears if the new status of the case is citation.
Comments	Enter any text for reference.

Page Element	Description
Code Violations	View the code violations associated with the hearing. Expand each section to view its description and the corrective action. Click the three-dot action menu to view details in a modal page.
Attachments	Click Add to open the Attachments page and include any documents.


- Click **Save** to close the Update Hearing Decision page and show the updated records on the Appeals and Hearings page. Depending on the options selected, the status of the case changes and the workflow stages and their tasks are updated. See *Using Workflow*.
Also, an inspection is scheduled as needed, a citation record is created, and a notice is sent to the responsible party. See *Working with Code Enforcement Inspections*, *Working with Notices*, and *Working with Citations*.

Adding Responsible Parties

Agency staff add and manage responsible parties related to a case.

Viewing Responsible Parties

- Select the **Code Technician Worklist** tile on the Agency Springboard and then select the Cases tab. Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
- On the Cases page, click the row to go to the case you are working with.
- Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
You can also view the already existing responsible parties from the **Responsible Parties** section on the Case overview page.

Page Element	Description
	Indicates that the person is the primary responsible party.
Responsible Party	View the name of the party responsible for the reported violation.
Mailing Address	View the address of the responsible party. You can view the location of the address on a map at the top of the page.
Email	View the email address of the responsible party.
Phone	View the phone number of the responsible party.

Page Element	Description
Status	Shows the status of the responsible party – <i>Active</i> or <i>Inactive</i> .
Type	View the type of the responsible party. For example, owner.
Online Access Status	Displays the status of the online access that was requested by the responsible party: <ul style="list-style-type: none"> ○ <i>Not Requested</i> ○ <i>Pending Approval</i> ○ <i>Issued</i> ○ <i>Denied</i>
Actions	<p>Select from these options:</p> <ul style="list-style-type: none"> ○ <i>Allow Access</i> ○ <i>Deny Access</i> ○ <i>Inactivate</i>: Access to the case is removed and a communication is sent to the responsible party. The person will not be included in the notice process. <p>The Access options are available only if a responsible party has requested access to this case. Also, once approved, the Actions menu shows only the <i>Deny</i> and <i>Inactivate</i> options. Similarly, after denying the access, the Actions menu shows only the <i>Approve</i> and <i>Inactivate</i> options. Once the access is issued, the responsible party can access their case details using the Resolve Issue page and take actions such as submitting appeals. See Resolving Issues.</p> <p>Note: The Access actions are also available to the assigned code technician on the Access Requests tab in the Code Technician Worklist.</p>

- To view more information about the responsible party record, click **View Details**. The Responsible Party Details page also gives the date on which the record was created and when it was last updated. If applicable, the detail page shows information about the access request, such as, the name of the person who approved or denied the access request, the date, and any comments.

A separate Online Access section is displayed if the responsible party has requested for online access, using the Resolve Issue page. Review the requester’s user name, email, phone, and the status of online access.

Managing Online Access Requests

The Online Access Requests section on the Responsible Parties page lists all the responsible parties who have requested access to the case. You can approve or deny the access for each request or drill down to the request details.

To approve an access request, click the **Actions** menu on the record and select Approve Access. On the Approve Access page you select one of the options:

- Link the request to an existing responsible party: Use the checkbox to select a responsible party from the list identified by the agency and click **Save**. The existing responsible party row detail is updated with the email address as per the access request and the online access status changes to *Access Allowed*. The Online Access section shows the details.
- Create a new responsible party: Select the check box and click **Save**. The Add Responsible Party page opens for you to enter the details and save. A new record is added to the Responsible Party grid, with the online access status as *Access Allowed*.

To deny an access request, click the **Actions** menu on the record and select Deny Access. The record is removed from the Online Access Requests grid and a new record is added to the Responsible Parties grid with online access status as Access Denied. To approve the request, you can use the Actions menu on the row and select Approve Request.

Once the request is approved or denied, the record is removed from the Online Access Requests grid.

Note: Approved and inactive responsible parties are not listed in the Approve Access page.

Adding Responsible Parties

1. Select the **Code Technician Worklist** tile on the Agency Springboard and then select the Cases tab.
2. On the Cases page, click a row to go to the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
4. Click the **Add Responsible Party** button. On the Add Responsible Party page, you can add a new responsible party by entering the details or you can click the **Select from Parcel Owners** link to search and select an existing parcel owner record.

When a parcel owner is selected from the **Select from Parcel Owners** link on the Add Responsible Party page, the **Primary Owner** field and the name fields are autopopulated.

Note: You must enter a value for the **Type** field if you have selected an existing parcel owner.

5. Select the **Primary** switch if you want to assign the newly added responsible party as the primary responsible party. Such an assignment will automatically update the earlier primary responsible party as not primary.
6. Click **Save** to add the responsible party and return to the list page, which always lists the primary responsible party with an indicator.

New responsible parties are active by default. You can set a responsible party as inactive by using the **Inactivate** option available in the **Actions** menu in each record. Inactive responsible parties are not included in the notices and they will not have access to the case.

Updating Responsible Party Detail

1. Select the **Code Technician Worklist** tile on the Agency Springboard and then select the Cases tab.
2. On the Cases page, click a row to go to the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
4. Click the **View More Details** button on the responsible party row to update the details.

5. On the Edit Responsible Party page, enter new values for the fields you want to change.
To enter an address, begin by entering the **Postal Code**. As you enter the code, the type-ahead list shows values that include appropriate state and city combinations. After you select a value, the city and state appear as read-only fields, and two address fields appear so that you can enter the rest of the address.
If you don't know the postal code, click the **Don't know** link that appears when the postal code field is blank. Clicking this link displays a full set of address fields.
6. Turn off the **Active** switch if you want to set the responsible party as inactive.
7. The Online Access section appears only if there is an access request from the responsible party, which is pending approval, approved, or denied. You can approve or deny the access depending on the status of the request.
8. Click **Save** to save the changes and return to the Responsible Parties page.

Working with Citations

A code enforcement officer issues a citation as a result of inspection related to a code violation. Citations can also be issued by agency staff such as a code technician using the Citations page in case details. A fee amount associated with each citation record is created, the details of which are listed in the Fees and Payments page.

Viewing Citations

You view a list of all citations issued for a case on the Citations page.

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Citations** in the left panel to open the list of citations.

Page Element	Description
Citation ID	View the identifier of the citation.
Description	View the description of the citation as entered at the time of issuing the citation.
Comments	View comments entered at the time of creating the case.
Due Date	View the due date for paying the citation fee.
Created By	View the name of the agency staff who created the case.
Code Violations	View the number of code violations related to the case.

4. Click a citation record if you want to open the Citation Details page and view the details including the list of code violations in their current status and the related citation fees.

Issuing a Citation

Agency staff such as a code technician can issue a citation for a case using the Citations page.

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click **View More Details** for the case you are working with.
3. Click **Citations** in the left panel to open the citations list page.
4. Click the **Issue Citation** button to open the Issue Citation page and enter values for the fields:

Page Element	Description
Description	Enter a description about the citation.
Due Date	Enter the due date by which the citation fee must be paid.
Compliance Date	Enter the date by which the responsible party must ensure compliance.
Comments	Enter any optional comments related to the citation.

5. The **Code Violations** section lists only those applied code violations that are in open status. Expand a record to view its details and the corrective action.
6. Click **Done**. The Citations page now shows the new record.

Once a citation is issued, a corresponding citation fee amount is calculated and the fee record is created in the Fees and Payments page. Fee amounts are calculated based on the fee schedule set up on the Issue Subtype page. For details, see [Setting Up Issue Subtypes](#).

Once a citation is issued, the corresponding citation fee items are listed in the Fees and Payments page, along with the fee amount. The distribution of fee items and the associated fee for each item are determined by the fee items and schedules set up. For details, see [Setting Up Fee Items](#) and [Setting Up Issue Subtypes](#)

For details about a code enforcement officer issuing citation using a mobile device, see [Overview of Mobile Oracle Municipal Code Officer](#).

Working with Code Enforcement Fees and Payments

You view and manage code enforcement fees and payments associated with a case on the Fees and Payments page in the case details.

Viewing Fees and Making Payments for a Case

The Fee and Payments page from the case details shows the details of the payments due for the case. Separate fee items are listed based on the source and type of the applicable fees. Payable amounts can include fees for case status changes such as for violation, citation, or any other case status changes.

The distribution of fee items and the associated fee for each item are determined by the fee items and schedules set up. For details, see [Setting Up Fee Items](#) and [Setting Up Issue Subtypes](#).

You use the **Pay** button to open the Pay Fees page and make the payment.

Tip: You can also make a payment for a case or citation from the agency springboard by selecting the *Make CE Payments* option in the **I want to** field. Registered public users can make payments for a case or citation using the CE Payments tile on their landing page.

The attributes on the case details – Fees and Payments page are updated once the payment is successful.

To view the fee details for a case and make payment:

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the row for the case you want to access.
3. Click **Fees and Payments** in the left panel .
4. On the Fees and Payments page, view a list of total code enforcement fees, such as *Total Fees*, *Total Payable*, *Total Payments in Process*, *Total Paid* and *Balance Due*. When there are multiple fee items, click the link of the fee to view a break-up of the fee items. You can also view the detailed list of separate fee items in the grid below.

A **Pay** button is displayed, when you have fee items due for payment. Use the Pay button to pay either all the balance amount which is due or pay only a particular fee item.

Page Element	Description
Total Fees, Total Payable, Total Payments in Process, Total Paid, Balance Due, and Pay button	The top section on the page displays the consolidated details for all the fee items displayed in the grid below. Click the link of the total fees to view a break-up if there are multiple fee items. Use the Pay button to open the Pay Fees page and pay the total balance due or pay for selected fee items.
Calculate Late Fee button	When there are overdue fee items, a late fee is associated with them, which the responsible party must pay. Click to calculate late fees for fee items, if any.
Fee Source	Shows the source from which the fee item was generated. For example, case status change, citation, and late fee.
Fee Item	The identifier of the fee.
Fee Reference ID	<p>The unique identifier of the fee reference generated for each fee item. The values are generated based on the fee autonumber rule set up on the Code Enforcement Options page.</p> <p>Note: The fee reference ID for a late fee will remain same as the value generated for the fee item it is applied on.</p> <p>See Setting Up Agency-Level Options for Code Enforcement.</p>

Page Element	Description
Amount	The amount due for the fee. Note: Fee amounts are calculated based on the fee schedule set up on the Issue Subtype page. For more information, see <i>Setting Up Issue Subtypes</i> .
Currency	The currency in which the fees are paid.
Status	Shows the status of the fee payment: <ul style="list-style-type: none"> ○ Paid ○ Processing payment ○ Due
Due Date	The date by which the payment must be made.
Assessed Date	The date on which the fee was assessed.
Payment Reference ID	The identifier of the payment.

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

Viewing Fee Item Details

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the case row you want to access.
3. Click **Fees and Payments** in the left panel or click the **View Details** link in the **Fees and Payments** section on the Overview page for the case.
4. On the Fees and Payments page, select the fee item for which you want to view details.
5. On the Fee Item Details page, view additional information about the fees such as fee reference ID, description about the fee item, and department. You can edit to make changes to the fields for fee amount, status, department, assessed and due dates, as well as enter comments.

Note: Code technicians can make citation payments on behalf of the responsible party by using the **I want to — Pay Citation** option on the Agency springboard.

Adding an Ad Hoc Fee Item

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Fees and Payments** in the left panel or click the **View Details** link in the **Fees and Payments** section on the Overview page for the case.
4. On the Fees and Payments page, click **Add** (+ button) to add an ad hoc fee item.

Page Element	Description
Fee Item	<p>Search and select a fee item.</p> <p>If a Fee Item is associated with a department, then the Department field gets automatically populated when you select the fee item.</p>
Amount (USD)	Enter the amount for the ad hoc fee.
Status	<ul style="list-style-type: none"> ○ Canceled ○ Due ○ Suspended ○ Pending (Default selection) <p>Fee items with a status of <i>Pending</i> are not added in Balance Due in the Fees and Payments page.</p> <ul style="list-style-type: none"> ○ Paid
Department	The department that calculates the fee amount.
Assessed Date	<p>The date on which the fee was assessed.</p> <p>Note: The Assessed Date always displays the date on which the system had last assessed the fee. Hence, whenever the complied on date for a code violation is updated to a previous date, the fee needs to be recalculated. See the Calculating Fines for Code Violations section below for details.</p>
Due Date	The date by which the payment must be made.
Comments	Add comments pertaining to this fee item.

5. Click **Save** to save the changes.

Paying Code Enforcement Fees

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click **View More Details** for the case row you want to access.
3. Click **Fees and Payments** in the left panel.
4. Click the **Pay** button to access the Checkout page. You can use the check boxes to select the fee items you want to pay for.

Note: When overdue fee items are present, the late fees for these are automatically calculated as you click the **Pay** button and the total amount to be paid is shown.

5. Click the Information icon next to the **Total Amount to Be Paid** to preview the fee items before making the payment.
6. Depending upon the agency's payment integration setup, various modes of payment are available, such as **Credit Card, Debit Card, PayPal** or **Cash**. Choose the payment method and click the **Make Payment** button to access the Payment Details modal.
7. Verify details on the Payment Details page and click **Done**.
8. The Cash Drawer page shows the details of the transaction. Click **Save** to save the changes and go to the Payment Successful page.
9. Click the **Print Receipt** button to print the payment receipt.
10. Click the **Back** link to return to the Fees and Payments page.
11. In the Fees and Payments page, **Payment Reference IDs** are generated for the paid fee items. Click the link to view a receipt with details such as, receipt number and date, reference number, amount paid, item details, and payment method.

Calculating Late Fees

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the row for the case you want to access.
3. Click **Fees and Payments** in the left panel.
4. Click **Calculate Late Fee** at the top of the grid.
5. The Calculate Late Fee pop-up window lists only the overdue fee items. Select the fee items for which you want to calculate the late fees.
6. Click **Submit** to return to the **Fees and Payments** page. The page now lists the late fee as a separate record with the same **Fee Reference ID** and its associated fee.

Calculating Fines for Code Violations

Code violation fines are calculated based on the rate and frequency (daily, weekly or fixed), as specified in the Rates and Fines section on the Code Violations Update Details page. See *Working with Code Violations*.

The prerequisites for setting up recurring fines are:

- A decision model set up in OCI Process Automation with the recurring fines defined.

For more information, see *Creating Decision Models for Fees*.

- A fee schedule with a fee item added.

Note: Ensure the following while creating the fee item and fee schedule:

- The fee item should have a value selected for the **Department** field.
- The fee schedule should have the **Mapping Source** set to *Code Enforcement Violation Fees*.

For more information, see [Setting Up Fee Schedules](#).

- Associate the fee schedule with the issue subtype definition for appropriate case(s).

For more information, see [Setting Up Issue Subtypes](#).

- Set the batch process using scheduled rules.

For more information, see [Setting Up Scheduled Rules](#).

Once the rate and frequency are set for a code violation, the system automatically calculates the fine incurred when the code violation extends beyond its comply by date. Occasionally, when the fee rate, complied on date or comply by date for a code violation is updated, an agency staff has to manually recalculate the fee for it. In such scenarios, you can trigger the calculation of fines for code violations using the **Calculate Fine** button on the Code Violation page.

To manually calculate fines for code violation:

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, click the row for the case you are working with.
3. Click **Case Information** and select Code Violations in the left panel to open the list of code violations.
4. Click the **Calculate Fine** button to open the Calculate Fine page.
5. Select the check box for the code violation to calculate the fine for it.
6. Click **Submit** to calculate fine for the selected code violation and return to the Code Violations page.
7. Click **Fees and Payments** in the left panel.

The Fees and Payments page now lists the fine as a separate record with a link to its code violation record, fee reference ID, the associated fee amount, and other details.

Working with Related Transactions

Applicants and agency users can link their consultation, business license, permit, or planning applications to other transactions using the Related Transactions page.

Transaction Linking

As agency staff you can establish relationships between transactions and then perform actions such as viewing the related transaction applications, marking them as primary, subapplication, or linked application. You can also remove links between related transactions.

Agency staff can also establish links between transactions and code enforcement cases. Only agency staff such as a code technician have access to the Case – Related Transactions page and are allowed to drill down to the case detail from other transactions. Public users do not have access to related transactions for cases.

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

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

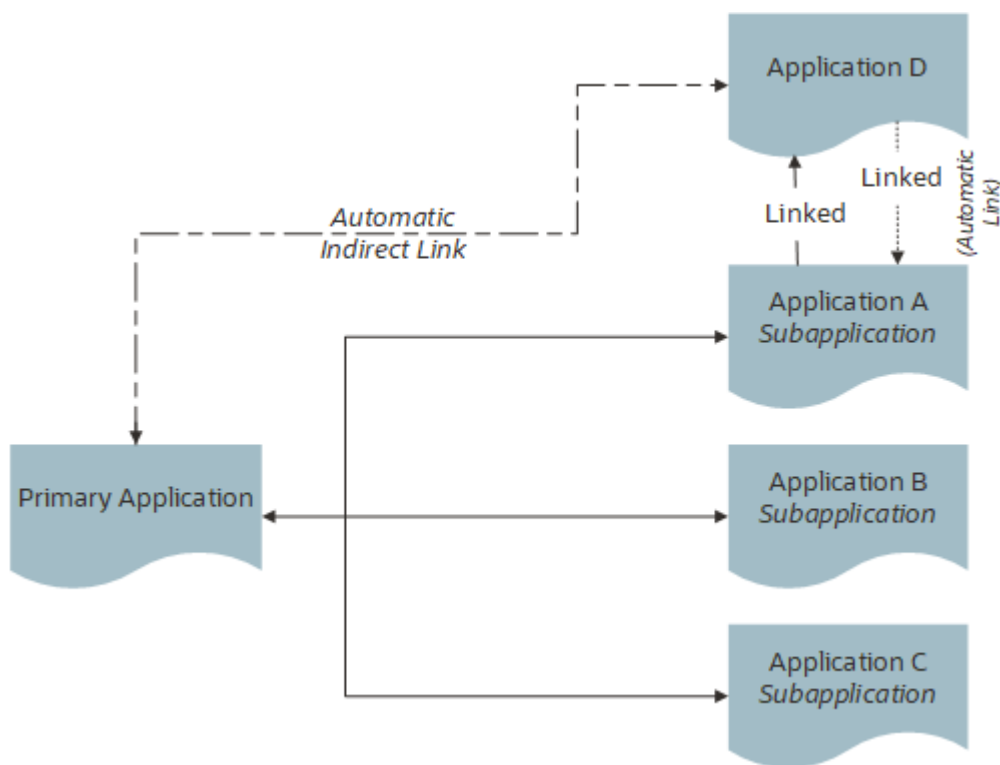
For example, if you link the current application to another application with the link type Primary, that application will automatically be linked to the current application with the link type Subapplication. Similarly, if you link the current application to another with a link type Subapplication, the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

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

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

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

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



Security Details for Working with Related Transactions

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

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

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).

Viewing Related Transactions


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

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

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

4. View the details of the linked transactions:

Page Element	Description
Show	Select the filter option to list the applications linked by the types: <ul style="list-style-type: none"> ○ All ○ Primary ○ Subapplication ○ Linked This option displays the count of applications for each type in parentheses.
Include Indirect Links <count>	Turn on the switch to list the indirectly linked applications for each application record. This switch is turned off by default.
Transaction	View the identifier of the linked transaction and a link to access the application detail.

Page Element	Description
	<p>Note: The detail link is available only for agency staff. Public users accessing this page for their transaction can only view the identifier of the application or case. They cannot drill down to the detail page.</p>
Classification	Shows the type of transaction.
Transaction Status	View the status of the transaction or case and the date of update.
Source	View the detail of the linking transaction: <ul style="list-style-type: none"> ○ Direct link: Shows the name of the user who linked the application and the date of linking. ○ Indirect link: Shows the link type of the linked application—primary, subapplication, or linked. Click the identifier link to access the application.
	Click and choose from options to: <ul style="list-style-type: none"> ○ Mark a transaction as subapplication or linked. ○ Remove the link between applications, or ○ Apply conditions of approval to permits. See a separate section on performing actions.

Adding a Related Transaction

As an applicant, you can establish links only from your business license, permit, or planning application. Agency staff can however add related transactions from any transaction. Code enforcement case related transactions are created and managed only by agency staff such as a code technician.

Note: Linking option for related transactions is set up in Functional Setup Manager (FSM). For details on setting up the related transactions for your agency, see *Setting Up Agencies*- Setting Up Related Transaction Linking.

To link a business license, permit, case, or planning application to a transaction:

1. Access the Transactions page from the Agency Springboard.
For cases, access the Cases tile from the Agency Springboard.
2. Select the business license, permit, case, or planning application for which you want to link a transaction.
3. Click the **Related Transactions** link in the left panel to open the Related Transactions page.

4. Click the **Link** button to open the Link Transaction page, which lists the applications you can link. Agency staff can access the list of cases in a separate tab. These pages list all the active applications and cases related to the selected property or case. Enable the **Show All** switch to view all the applications or cases in the system.

Note: If no property is associated with the application or case, then all applications that are open for linking are listed by default.

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

- o *Primary*
- o *Subapplication*
- o *Linked*

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

Select one of the options to establish a link between the source application and the selected transaction applications. The Link Transaction page closes to show the Related Transactions page, which now lists the new transaction rows.

Performing Actions on Related Transactions

Agency staff and registered public users such as applicants and contact users with appropriate permissions can take action to establish links between transactions. Only agency staff can manage related transactions for code enforcement cases.

As an applicant or contact user you can remove link between related transactions from your transactions. This is not applicable to code enforcement cases.

Agency staff have access to all transactions to remove related transaction links.

Click the **Actions** menu and select from:

- Mark as Subapplication
- Mark as Linked
- Remove Application Link (Not available for an automatically linked transaction)
- Apply Conditions of Approval: Add conditions of approval to the current permit.

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

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

Application Link Type	Actions available
Primary	<ul style="list-style-type: none"> • Mark as Linked • Remove Application Link
Subapplication	<ul style="list-style-type: none"> • Mark as Linked • Remove Application Link

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

10 Recording and Billing Time

Security Details for Recording and Billing Time

This topic describes important security roles, requirements, or considerations specific to recording and billing time, including assessing fees for time entries on a transaction.

Permit application

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

Planning application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Assess fees Time Recording on Planning applications for All	Assess time recording on planning applications assigned to all.	PSC Zoning Administrator PSC Principal Planner
PSC Assess fees Time Recording on Planning applications for self	Assess time recording on planning applications assigned to themselves.	PSC Planning Assistant PSC Associate Planner
PSC Planning Time Recording Inquiry	View time recording on planning applications.	PSC Agency Staff - All agency users
PSC Planning Time Recording Management All	Manage time recording on planning applications assigned to all.	PSC Zoning Administrator PSC Principal Planner PSC Planning Assistant PSC Associate Planner PSC Plan Reviewer

Code enforcement

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Case Time Recording Management assigned to self	Allows users to manage case time recordings assigned to themselves.	PSC Code Enforcement Application Administrator PSC System Administrator PSC Code Enforcement Officer PSC Code Enforcement Technician
PSC Case Time Recording Management for All	Allows users to manage case time recordings assigned to all.	PSC Code Enforcement Application Administrator PSC System Administrator

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

For more information on all the predefined security data such as abstract roles, job roles, privileges and so on, see the [Security Reference for Oracle Permitting and Licensing](#).

Adding Time Entries

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

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

Accessing Time Entry

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

This is an example of a Time Recording page in the case details

City of INNOVATION

Case
Hearing
C-221215-00483 | Inoperable Vehicle
1421 San Antonio Ave,
Alameda

Time Recording

Recorded Time Unassessed Assessed

↓ Add Time Search

Fee Source	Name	Category	Subcategory	Date	Hours	Minutes	Billable
Case C-221215-00483	Sam Cook	CE Case	CE_Case_Meeting	1/11/23	1	0	Yes
Case C-221215-00483	Sam Cook	CE Case	CE_Case_Documentation	1/12/23	1	30	Yes
Case C-221215-00483	Sam Cook	CE Case	CE_Case_Research	1/11/23	2	30	Yes

Overview
Timeline
Property Information
Workflow
Inspections
Notices
Communication
Case Information
Responsible Parties
Citations
Time Recording
Fees and Payments
Related Transactions

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

This is an example of a Time Recording page accessed from the agency springboard

Transaction	Transaction Description	Source	Source Description	Property	City	State	Postal Code	Transaction Status	Last Date Time Recorded	Total Hours	Total Minutes
C-230105-00485	Overgrown Vegetation	CINS-230105-00002	Inspection	650 Grand St	Alameda	California	94501	In Compliance			
C-230105-00485	Overgrown Vegetation	Case		650 Grand St	Alameda	California	94501	Compliance			
C-221215-00482	Inoperable Vehicle	Case		2070 Clinton Avenue	ALAMEDA	California	94501	Warning			
FNC-2023-00019	Residential Fence	Plan Review	Cycle 2	1011 Lincoln Avenue	ALAMEDA	California	94501	Plan Review			
FNC-2023-00019	Residential Fence	Plan Review	Cycle 5	1011 Lincoln Avenue	ALAMEDA	California	94501	Plan Review			
FNC-2023-00019	Residential Fence	Plan Review	Cycle 3	1011 Lincoln Avenue	ALAMEDA	California	94501	Plan Review			
FNC-2023-00019	Residential Fence	Plan Review	Cycle 1	1011 Lincoln Avenue	ALAMEDA	California	94501	Plan Review			
FNC-2023-00019	Residential Fence	Plan Review	Cycle 4	1011 Lincoln Avenue	ALAMEDA	California	94501	Plan Review			
C-221215-00483	Inoperable Vehicle	Case		1421 San Antonio Ave	Alameda	California	94501	Hearing	1/12/23	5	0

By default, this page displays permit and planning transactions that aren't in a terminal status (Completed, Denied, Certificate of Occupancy, Void, or Withdrawn). For example, it won't display expired permit inspections or completed plan review cycles. Turn on the **Show All Statuses** switch to show all transactions assigned to you regardless of status.

Click a row to access the transaction page where you can enter your time.

Adding a Time Entry

1. Access the transaction that you want to add time for.

2. Click **Add Time**.

This example illustrates the Time Details page for a case

Time Details

Case | C-231009-00575

* Name	<input type="text" value="Sam Cook"/>	Bill Rate (USD)	150.00
* Time Type Code	<input type="text" value="CECASERCH"/>	Override Bill Rate (USD)	<input type="text" value="140.00"/>
Category	CE Case	Billable	<input checked="" type="checkbox"/>
Subcategory	CE_Case_Research	Assess Now	<input checked="" type="checkbox"/>
* Date	<input type="text" value="11/30/23"/>	Total Fees	
Hours	<input type="text" value="1"/>		
Minutes	<input type="text" value="30"/>		
Comments	<input type="text" value="Override of hourly rate"/>		

3. On the Time Details page, enter values for the following fields:

Page Element	Description
Name	Enter the agency user name of the person performing the task. Staff who have the ability to enter time for others, such as billing supervisors, can select any agency staff member in this field. All other agency staff automatically have their name populated in this field and can't change it.
Time Type Code	Enter the time entry type code that you want to use. The page displays the category and subcategory associated with the code that you select in the Category and Subcategory fields, respectively. The time entry type code also determines the default values of the Billable and Assess Now switches on this page and whether those default values can be changed. For more information on time entry types, see <i>Setting Up Time Entry Types</i> .
Date	Select the date that you're entering time for. The current date is the default value.
Hours and Minutes	Enter the amount of time you spent on the transaction in hours and minutes. You can select 0 to 23 in the Hours field and 0 to 59 in the Minutes field.
Bill Rate	Displays the bill rate in USD associated with job title in the user profile of the agency staff. For more information, see <i>Defining Job Titles</i> .
Override Bill Rate	Enter an amount in USD that overrides the default bill rate in fee calculations. Only agency staff with time recording management roles have permission to override the job title bill rate in the time details.
Billable	Use this switch to indicate whether the time is billable. Whether this switch is turned on by default or can be overridden is determined by the time entry type that you select.
Assess Now	Use this switch to indicate whether the fees associated with this time entry are assessed immediately when you save it. Note: This switch appears only for staff who have the ability to enter time for others. It is disabled when the Billable switch is turned off.
Total Fees	Displays the fees associated with the time entry, whenever applicable.
Comments	Enter any additional information you want to record for the time entry.

Page Element	Description

4. Click **Save**.

Modifying a Time Entry

Note: Agency staff with permission to assess fees can modify or delete a time entry until the fees associated with it have been paid. They can add or update comments for a time entry until its associated transaction reaches terminal status such as *Completed* or *Denied*. Staff without permission to assess fees can't modify or delete a time entry once fees have been assessed for it.

1. Click a time entry row.
2. On the Time Details page you can:
 - o Edit the time entry fields.
 - o Delete the time entry. You will be prompted to confirm the permanent deletion.
3. Click **Save**.

Assessing Fees for Time Entries

Agencies can bill for time spent by their staff working on transactions.

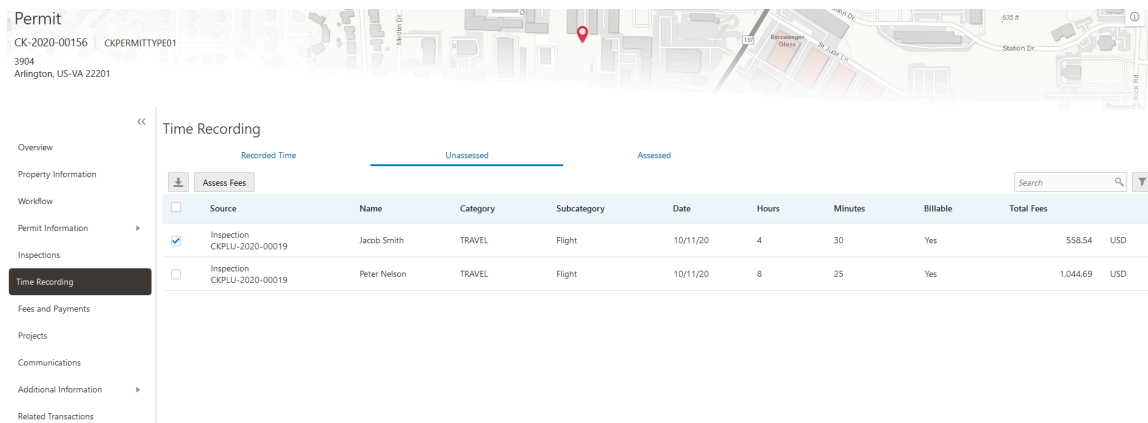
Fees are automatically calculated when time is recorded. Agencies can charge at different hourly rates by setting up bill rates for each job title for use in fee formulas. Each staff person has one job title in their user profile and the associated bill rate appears when recording time. Agency staff with time recording management roles have permission to override the job title bill rate in the time details.

For more information about permissions and security, see [Security Details for Recording and Billing Time](#).

Time entries with the **Assess Now** switch turned on are immediately assessed when they're saved and appear in the Fees and Payments page for the transaction. If the switch is turned off, an agency staff member must assess the fee explicitly.

You assess fees on the Time Recording page for a transaction.

This is an example of the Time Recording page for a permit.



This page has three tabs:

- The **Recorded Time** tab displays all recorded time entries for the transaction.
- **Note:** You can add time entries on this tab for planning applications.
- The **Unassessed** tab displays all time entries for which fees have not yet been assessed.
- The **Assessed** tab displays time entries for which fees have already been assessed.

Assessing Fees for Time Entries

1. Access the Unassessed tab of the Time Recording page.
2. Select the check box next to each time entry you want to assess.
3. Click **Assess Fees**.

The application moves the selected time entries from the Unassessed tab to the Assessed tab, and creates a fee for each fee item associated with each assessed time entry on the Fees and Payments page.

For more information on the Fees and Payments page, see [Working with Fees and Payments](#)

Note: Even after a fee is assessed for a time entry, agency staff with permission to assess fees can modify it until one or more of the fees associated with the time entry has been paid.

Accessing Unassessed Time Fees from the Agency Springboard

You can quickly access transactions with unassessed fees using the **Unassessed Time Fees** tile on the agency springboard.

This example shows the Unassessed Time Fees page.

Unassessed Time Fees

Show All Statuses

Transaction	Property	Status	Fees
CK-2020-00068 CKPERMITTYPE01	10276 Brooks St SAN FRANCISCO, California 94105	Inspection	3250.36 USD
CK-2020-00045 CKPERMITTYPE01	10276 Brooks St SAN FRANCISCO, California 94105	Inspection	371.00 USD
CK-2020-00138 CKPERMITTYPE01	10276 Brooks St SAN FRANCISCO, California 94105	Inspection	1077.34 USD
CK-2020-00136 CKPERMITTYPE01	10276 Brooks St SAN FRANCISCO, California 94105	Inspection	3212.34 USD

By default, this page displays transactions with unassessed fees that aren't in terminal status (that is, Completed, Denied, Certificate of Occupancy, Void, or Withdrawn). For example, it won't display permits with expired inspections or completed plan review cycles. Turn on the **Show All Statuses** switch to show all transactions with unassessed fees.

Note: Time entries with calculated fees of zero (0) do not appear on this page.

Click a row to access the **Unassessed** tab of the Time Recording page.

11 Working with Accounting

Generating Accounting Transactions and Journal Entries

Depending on the accounting framework implemented by your agency, you use accounting batch processing to generate subledger accounting events or accounting transactions and journal entries from source transactions such as payments and refunds.

Accounting transactions and journal entries are created if the offering-level Accounting Framework Option is *Public Sector Accounting*, and subledger accounting events are created if the offering-level Accounting Framework Option is *Financials Cloud Subledger Accounting*. For more information, see [Selecting an Accounting Framework](#).

Before you run the Generate Accounting process, set up accounting event definitions and accounting rules. Processing includes only source transactions with active accounting event definitions to create subledger accounting events or accounting transactions and journal entries. If an accounting event is enabled for Public Sector Accounting, you must activate the relevant accounting rules to create accounting transactions and journal entries. For more information, see [Managing Accounting Events](#) and [Setting Up Accounting Rules](#).

Note: You must enable accounting event definitions for the FeeReceipts and FeeRefunds events to process source transactions in Code Enforcement. These events must also be enabled to support overpayments and payments made with multiple payment methods.

Note: If the source transaction is a cash reconciliation adjustment, accounting transactions are created at the time the reconciliation adjustment is made. However, batch processing is required to generate the resulting journal entries. If journal entries aren't created, verify that the ReconAdjustment event definition is enabled.

The transaction status of accounting transactions that are created without journals is *Created*. The status of accounting transactions after journal entries are generated is *Generated*. The Generate Accounting process groups accounting transactions into journals based on the combination of ledger, accounting date, accounting event, and accounting rule.

You set up and run batch processing on the Generate Accounting page, which you can access by selecting **Accounting > Generate Accounting**.

Entering Generate Accounting Process Parameters

1. Access the Parameters tab on the Generate Accounting page.
2. Use the **Date From** and **Date To** fields to process source transactions such as payments or refunds made during the date range that require accounting. The system configuration determines which source transactions will be processed.

The payment or refund accounting date is based on the next available date in the accounting calendar. You can review the accounting details after processing on the Accounting Transactions page. For more information, see [Viewing Accounting Transactions](#).

Scheduling the Process

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

Page Element	Description
Frequency	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> ○ <i>Once</i>: Select to run the process one time only. ○ <i>Hourly or minute</i>: Select to run the process at regular time intervals. ○ <i>Daily</i>: Select to run the process at regular intervals in days. ○ <i>Weekly</i>: Select to run the process at regular intervals in weeks. ○ <i>Monthly</i>: Select to run the process on specific days of the month. ○ <i>Yearly</i>: Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing.
Hours and Minutes	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the Hours field and 30 in the Minutes field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p>Note: These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
Days	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p>Note: This field is available only if you select a process frequency of <i>Daily</i>.</p>
Weeks	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p>Note: This field is available only if you select a process frequency of <i>Weekly</i>.</p>

Page Element	Description
<p>By day</p>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the Second and Wednesday options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> <p>Note: This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p>By date</p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p>Note: This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p>Month</p>	<p>Select the months in which you want your process to run.</p> <p>Note: This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.

4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- o On success
- o On error
- o On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

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

Viewing Accounting Transactions

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

Each accounting transaction has one of the following statuses:

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

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

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

Reviewing Journal Entries

You view and edit journal entries on the Journal page.

Journals contain debit and credit accounting entries created by the Generate Accounting process for the accounting transactions that it processes. You can export journals that do not contain errors to an Enterprise Resource Planning (ERP) system.

Viewing Journal Entries

Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.

The grid on the Journal page displays all of your journal entries and their current status by the accounting date. Valid journal entry statuses are:

- *Created*: Indicates that the journal has been created but not validated.
- *Error*: Indicates that the journal has one or more validation errors.
- *Valid*: Indicates that the journal has been validated and is ready to be exported.
- *Sent*: Indicates that the journal has been exported to a file that can be used to update an ERP system.

Reviewing Accounting Lines

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. In the Lines tab of the Journal Details page, select an accounting line.
4. On the details page, you can update the following accounting fields:
 - **Account**
 - **Division**
 - **Department**
 - **Fund**
 - **Function**
 - **Program**
5. Click **Save**.
6. On the Journal Details page, click **Validate** to ensure that the accounting lines are still valid after the changes you made.

Viewing Journal Entry Errors

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. Access the Header Errors tab to view any header errors for the accounting line.
4. Access the Line Errors tab to view any line errors for the accounting line.
You can correct these errors on the Lines tab. Once you correct and validate a line error, it no longer appears on the Line Errors tab.

Exporting Journal Entries

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

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

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

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

Entering Export Journals to ERP Process Parameters

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

Page Element	Description
Mapping Name	Select the Data Format Exchange mapping that you want to use to generate the file. For more information on the Data Format Exchange utility, see Setting Up Data Format Exchange Maps .
All Open Periods	Select to include journals for all open accounting periods.
Specify Dates	Select to include journals for a specific accounting date range.
Accounting Date From and Accounting Date To	Specify the range of accounting dates for which you are exporting journal entries.
Select Ledgers	Select the ledgers for which you want to export journal entries.

Scheduling the Process

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

Page Element	Description
Frequency	Select how frequently you want to run the process. Values are:

Page Element	Description
	<ul style="list-style-type: none"> ○ <i>Once</i>: Select to run the process one time only. ○ <i>Hourly or minute</i>: Select to run the process at regular time intervals. ○ <i>Daily</i>: Select to run the process at regular intervals in days. ○ <i>Weekly</i>: Select to run the process at regular intervals in weeks. ○ <i>Monthly</i>: Select to run the process on specific days of the month. ○ <i>Yearly</i>: Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing.
Hours and Minutes	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the Hours field and 30 in the Minutes field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p>Note: These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
Days	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p>Note: This field is available only if you select a process frequency of <i>Daily</i>.</p>
Weeks	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p>Note: This field is available only if you select a process frequency of <i>Weekly</i>.</p>
By day	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the Second and Wednesday options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p>

Page Element	Description
	<p>Note: This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p>By date</p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p>Note: This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p>Month</p>	<p>Select the months in which you want your process to run.</p> <p>Note: This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

Setting Up Process Notifications

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2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- On success
- On error
- On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

Processing the Journal Entry Output

Use the `publicSectorMappingAttachments` REST API to process the output file generated by the Export Journals to ERP. For more information on this REST API, see [REST API for Oracle Public Sector Cloud](#).

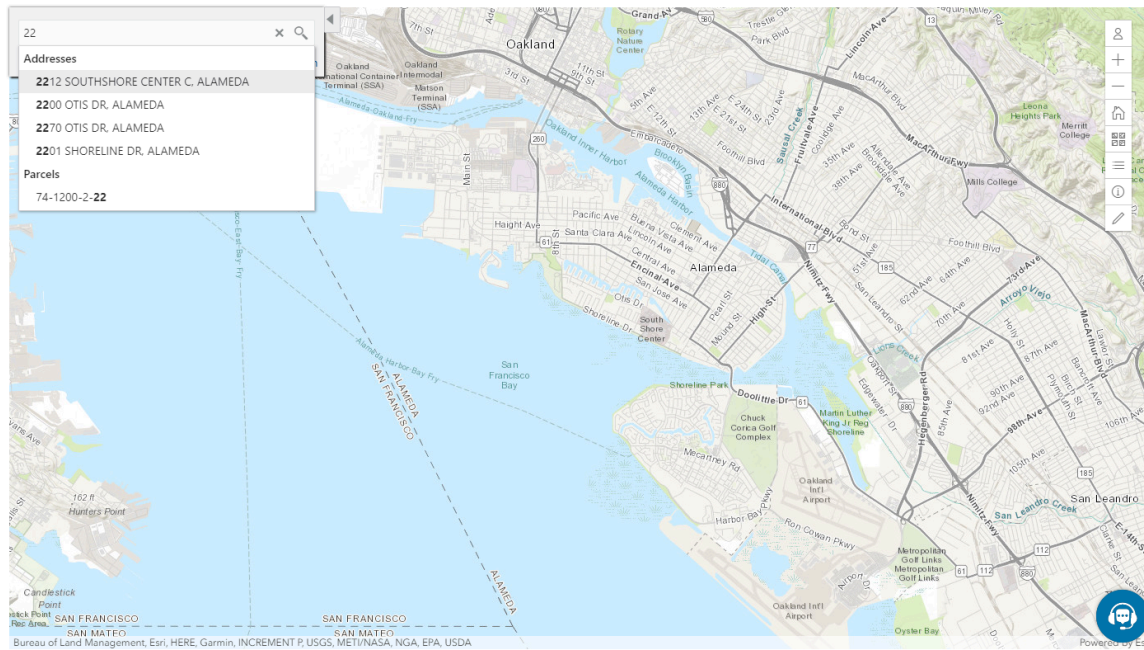
12 Working with Maps

Overview of Delivered Maps

Maps provide a convenient way for agency staff and public users to see and interact with geographical information. For example, maps can show the locations of parcels and addresses as well as the locations of transactions such as permits, planning applications, projects, incidents, cases, and business license activity.

Note: Map functionality relies on integration with a third-party map service such as Esri Geographic Information Systems (GIS) and configuration in Oracle Permitting and Licensing. For more information, see the *Implementing Your Cloud Integrations* guide.

This example shows the main map that agency staff uses to see properties and transactions.



The following tables describe the delivered maps in the Oracle Permitting and Licensing system.

Main Maps

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

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

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

Additional Maps for Applications

This table lists additional maps that support applications:

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

Map Name	Users	Navigation	Usage
			See <i>Overview of Mobile Oracle Inspector for Permits</i> .
Permit list	Agency staff Registered public users	For agency staff: access the application lists on the Transactions page. For registered public users: access the application lists on the Applications page. On any of these pages, click the Map View icon.	View the locations of the transactions on the list. See <i>Managing Transactions</i> .
Public notification	Agency staff	<ul style="list-style-type: none"> Click the Map icon in the page header, then click Public Notification in the drop-down menu that appears. From the Planning Application detail page, select a hearing where the schedule is final, then select the Actions button and choose Generate Notifications from the menu that appears. 	Create a notification zone by specifying a distance from selected parcels. After creating a notification zone, download.csv files with parcel, address, and owner information for all parcels that are at least partially within the zone. See <i>Creating Map-Based Public Notification Lists</i> .

Maps for Code Enforcement

This table lists additional maps that support code enforcement:

Map Name	Users	Navigation	Description
Agency - code enforcement	Agency staff	On the Code Technician Worklist page, go to a tab for managing incidents and then click the Map View icon.	View the locations of incidents that appear on the selected worklist tab. See <i>Using the Code Technician Worklist</i> .
Code enforcement issue intake	Registered and anonymous public users	Follow the guided process for reporting an issue until you reach the page where you enter the issue location.	Identify the location of an issue that is being reported. See <i>Reporting Issues</i> .
Mobile code enforcement inspections	Agency staff	When reporting a new violation, click the Location of the incident option.	Identify the location of a violation that is being reported by an inspector who is using the mobile inspection application. See <i>Overview of Mobile Oracle Municipal Code Officer</i> .

Map Name	Users	Navigation	Description
Public - code enforcement	Registered and anonymous public users	On the code enforcement landing page, click the View Recent Issues tile.	View recent code enforcement issues. See <i>Viewing Recent Issues</i> .

Maps in Transaction Headers

This table describes the map that appears in transaction headers:

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

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

Using the Map Toolbar

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

Note: Use map profiles to configure which tools are available on a map. For information on configuring which tools appear, see *Setting Up Map Profiles*.

These tools appear on the main toolbar:


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

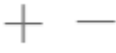








Image	Name	Configuration	Description
			displays the profile name and a thumbnail image of the map that illustrates its general appearance.
	Zoom In and Zoom Out	Use the Enable Zoom switch on the map profile.	Use these tools to zoom in or out. You can also double-click a map location to zoom in.
	Show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

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

Drawing on Maps

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

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

Printing Maps

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

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

Here's how to print a map:

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

Selecting Parcels and Assets

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

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

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

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

This opens the toolbar with the drawing tools.

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

This opens the map layers dialog box.

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

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

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

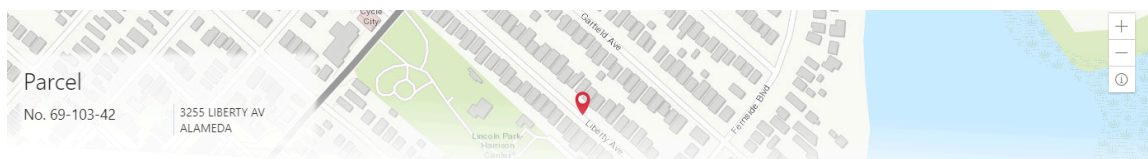
Viewing Map Markers

Map markers identify the location of an object such as an application, project, incident, case, parcel, or address.

Marker on the Transaction Header Map

The map in the header of a transaction page shows a single marker for the current object.

This example illustrates the Parcel page, where the map marker shows the parcel's location.

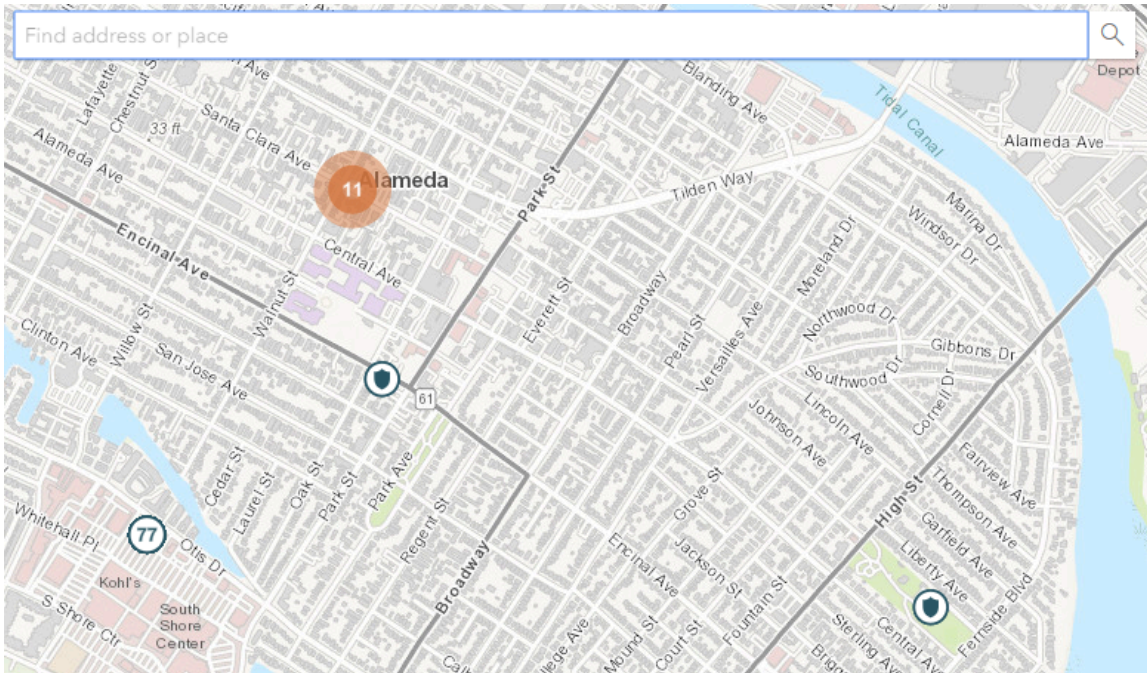


Other Map Markers







Maps other than the ones in transaction headers have these markers:

- Transaction-specific icons to mark the locations of single transactions.
- Numbered circles to mark locations with multiple transactions.
- Orange-shaded double circles to represent multiple neighboring locations that are clustered together because of the map zoom level.

This example is from the View Recent Issues map, where map markers represent code enforcement issues.



The following table provides a key to the marker icons:

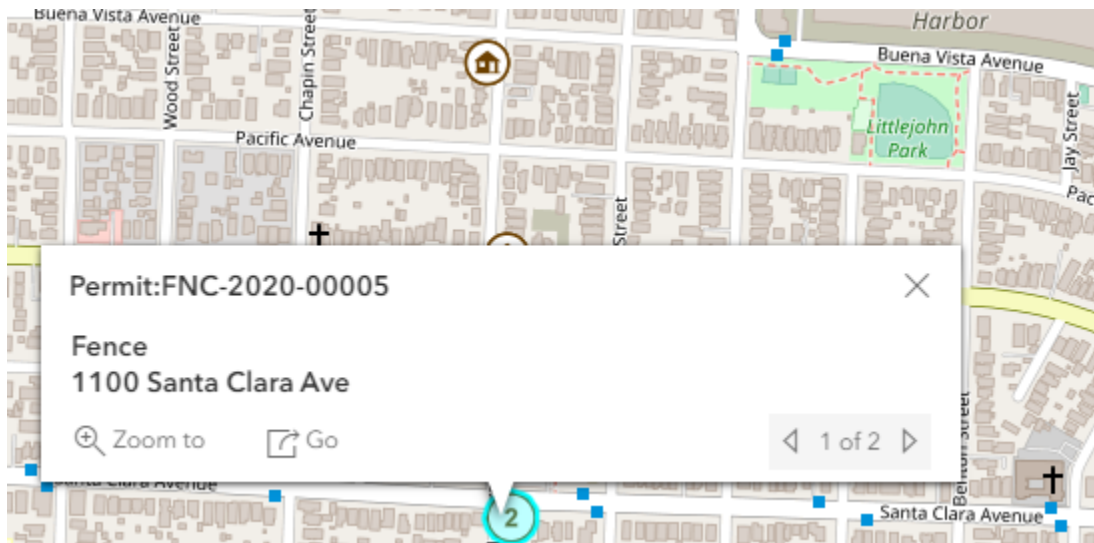
Map Marker	Description
	The location has a single code enforcement issue.
	The location has a single permit application.
	The location has a single planning application.
	The location has a single project.
	The location has a single business license.
	There are multiple transactions at the same location.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

Viewing Details for a Marker

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

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

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



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

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

Using the Main Map and Explore Your City Map

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

With these maps, users can do the following:

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

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

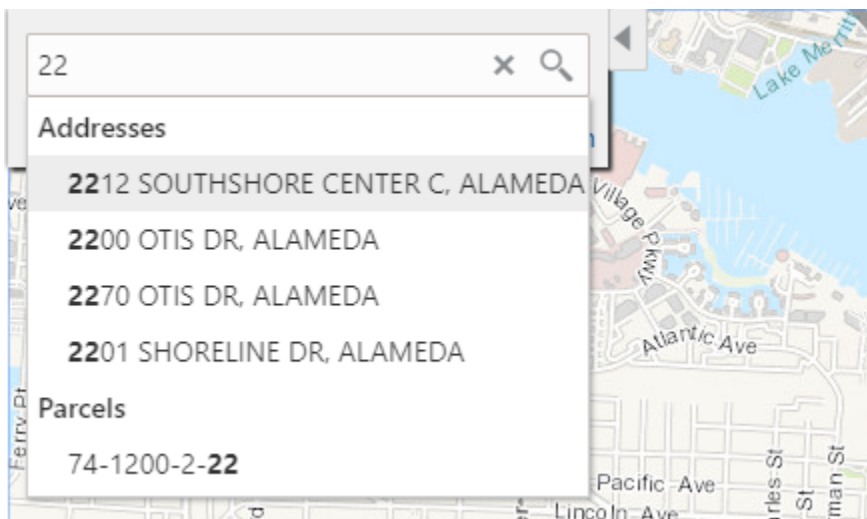
- Search for transactions and view transaction markers on the map.

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

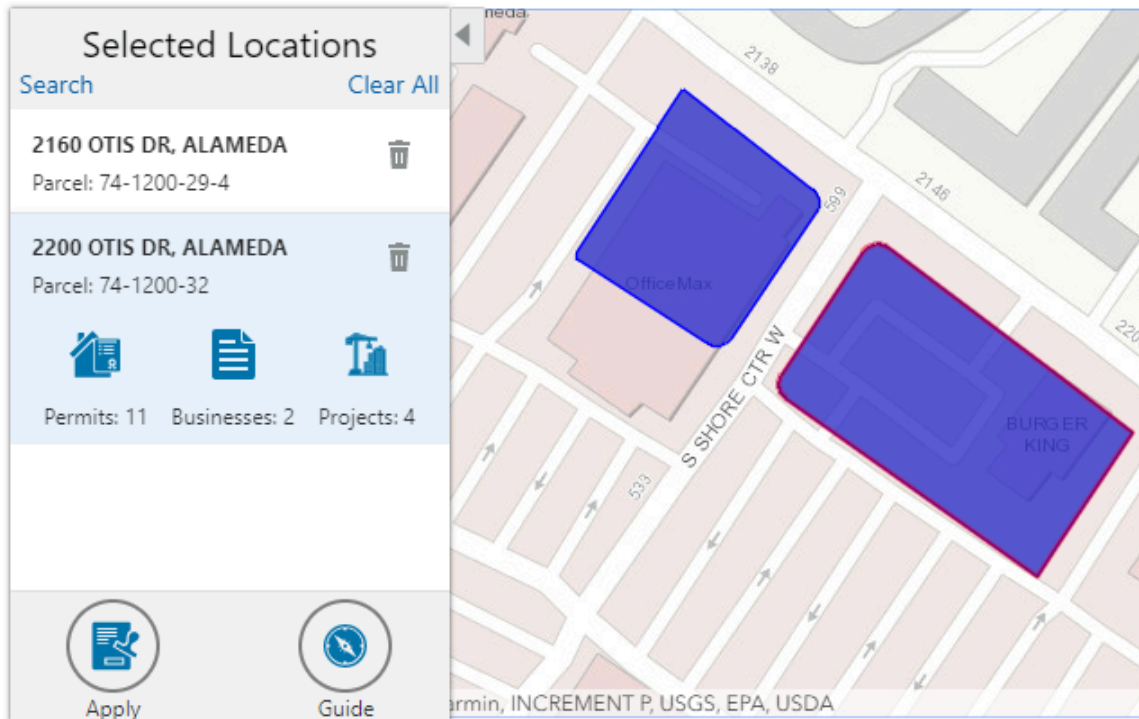
Note: To provide different types of users with the most appropriate interface, there are separate main maps for agency users, registered public users, and anonymous public users. These maps can have different map profiles, giving you control over whether various map options are available to each audience.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

Selecting Properties Using the Basic Search

This example illustrates the basic property search on the map.



This example illustrates the map when properties have been selected.



To search for properties and select them:

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

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

Note: Agencies can choose to hide their business license and other business information from appearing in the search results and on the maps. For details on how to hide business information, see [Setting Up Agency-Level Options for Business Licenses](#) and [Managing Business Information](#).

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

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

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

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

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

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

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

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

5. Use these options to deselect properties:

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

Selecting Properties Using the Selection Toolbar





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



To select and deselect properties using drawing tools:

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

The drawing toolbar appears.

2. Use these tools to make your property selection:

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

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

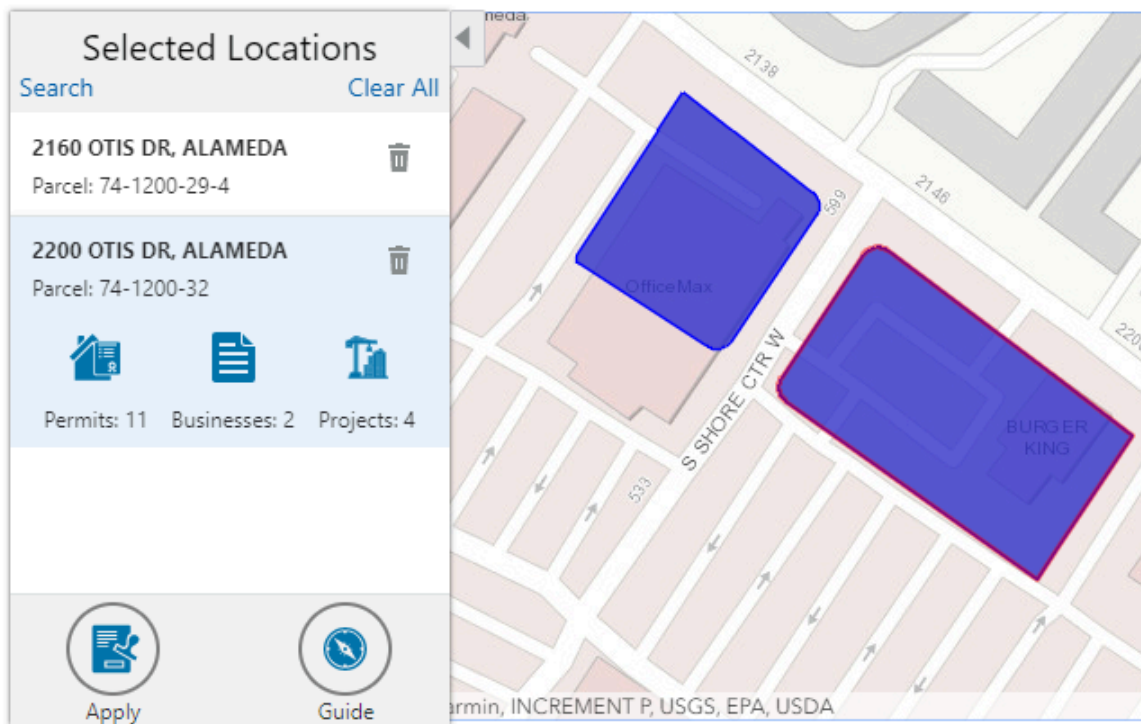
3. Review details of your selections on the Selected Locations list.

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

Using the Selected Locations List

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

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



To use the Selected Locations overlay:

1. Review the information cards for the selected locations.

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

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

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

If the selected property is associated with any applications or projects, the selected card expands and displays icons for any associated transactions. There are separate icons for **Permits, Planning Applications, Businesses** (business licenses), **Cases, Incidents** and **Projects**. The icon label includes a count of the related transactions.

Note: If the selected property has an associated business license that is marked to be hidden, then the icon label will not include it in its count.

If the property is not associated with any transactions, the selected card looks the same as it does when it's collapsed.

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

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

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

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

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

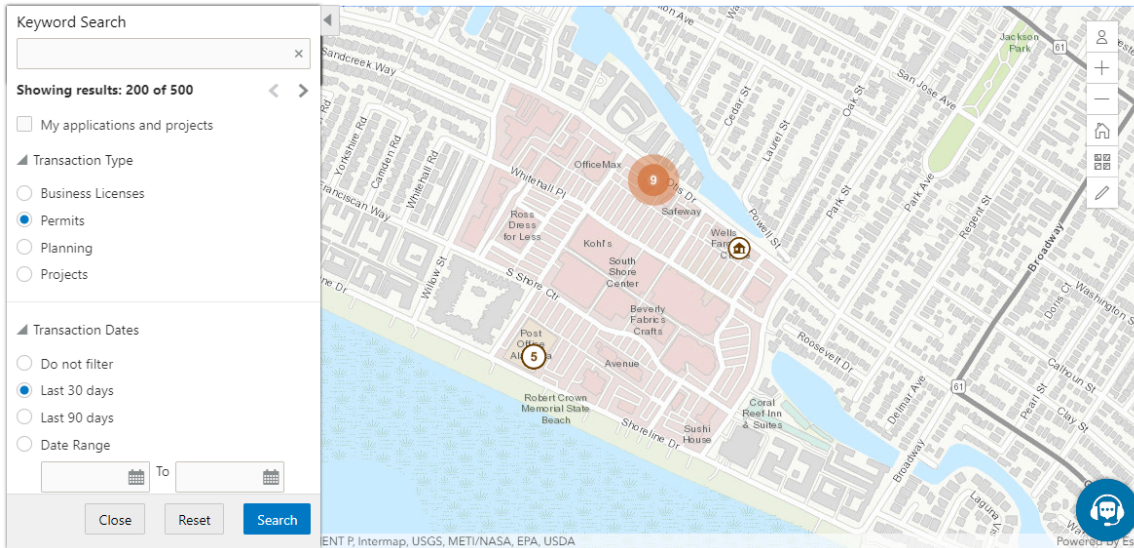
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

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

Using Advanced Search to View Transactions

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

This example illustrates the advanced search.



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

To show transactions on the map:

1. Click the **Advanced Search** link on the basic search overlay.

A new overlay appears.

2. Enter search keywords, if any, in the search field at the top of the overlay.

Search on data such as a business name or permit type. Don't use this field to search for addresses; use the basic search instead.

3. In the **Transaction Type** section, indicate which type of transaction to search.

Depending on which product offerings you enable, you can search for **Business Licenses**, **Permits**, **Planning** (planning applications), **Cases**, **Incidents** or **Projects**.

Note: Agencies can choose to hide their business license and other business information from appearing in the advanced search results and on the maps. For details on how to hide business information, see [Setting Up Agency-Level Options for Business Licenses](#) and [Managing Business Information](#).

4. In the **Transaction Dates** section, choose a date range to search.

Options include **Do not filter**, **Last 30 days**, **Last 90 days**, or a custom **Date Range**. If you use a custom date range, enter a start date, end date, or both to define the range.

For date-restricted searches:

- The application submission date must fall in the specified time period.
- A project start date must be after any start date you specify. If you use a custom date range with an end date, the project end date must be before any end date you specify.

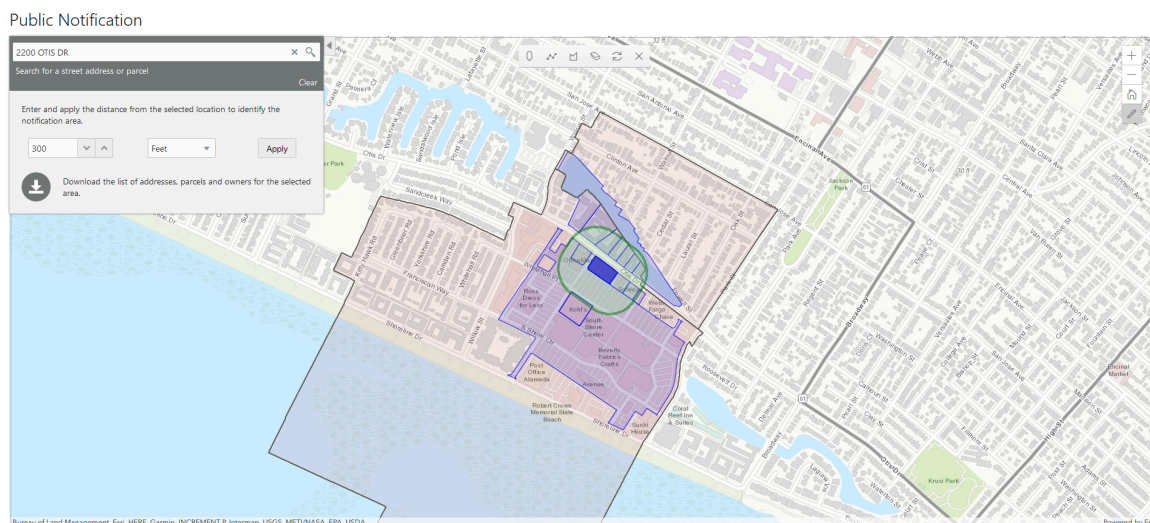
5. Click **Search** to perform the search.
Map markers appear for the transactions that meet your search criteria. The overlay also displays text stating how many results were found.
Users can see up to 200 results at a time. If more than 200 results exist, use the Previous (<) and Next (>) icons to scroll to a different block of results and update the map to show markers for the new block of results.
6. To clear search criteria, click **Reset**.
7. To close the advanced search and return to the simple location search, click **Close**.

Creating Map-Based Public Notification Lists

The Public Notification map enables you to define an area on a map and generate .csv files for the parcels, owners, addresses, and neighborhood attributes that are included in that area. Use the .csv files to create your mailing list. The notification area consists of all properties that are at least partially within a specified distance of the selected property or properties.

A context-specific instance of this page is available for scheduling hearing notifications. See [Generating a Hearing Notifications List](#).

The following example illustrates the Public Notification page, where you can select properties, define a notification area around the selection, and download lists of addresses, parcels, owners, and neighborhood attributes in the notification area.




To define a notification area and generate notification lists:

1. Access the Public Notification page.
To access the page from the global header, click the Maps icon, then click **Public Notification** in the drop-down menu.
You can also access the page directly from the list of hearings for a planning application. If the hearing schedule is final, the action menu for the hearing includes the **Generate Notifications List** action. This action opens the Generate Notifications List window, which contains the Public Notification page. For more information, see [Generating a Hearing Notifications List](#).
2. Select a property, or confirm the default property selection.

If you access the Public Notification page from a hearing for a planning application, the property or properties from the planning application are selected by default.

The two methods for selecting properties are:

- Use the search field to search by street address or parcel number, then click the desired property in the type-ahead list or the search results.
- Click the Show Selection Tools icon on the main map toolbar: 

Use the selection tools such as **Draw Point**, **Draw Polyline**, or **Draw a Polygon** to select properties.

For detailed information on using the selection tools, see [Using the Main Map and Explore Your City Map](#).

3. Define the notification area by entering a buffer distance surrounding the selected properties.

The fields for defining the notification area appear below the search field when a property is selected.

Enter a number and select a unit of distance for the buffer area: *Feet, Miles, Meters, or Kilometers*.

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

4. Click **Apply**.

The notification area appears on the map. Visually, it appears as a bold green outline that follows the contours of the selected property at the specified buffer distance. If you selected multiple properties, there can be multiple notification areas. Parcels that are fully or partially within the notification area appear with a blue outline so you can see which parcels are included in the notification list. If the map is enabled to show neighborhood groups that are fully or partially within the notification area, they appear as a pink layer with a black outline.

5. To change the notification area, modify the property selection, the buffer distance for the boundary, or both, and then click **Apply** again.
6. To clear the property selection and the notification area, click either the **Deselect All** tool or the **Clear** link on the Search overlay.
7. Turn on the **Modify Selection** switch to use the selection tools to manually add parcels outside of the notification area or remove parcels from the notification area.

The selection outline around the parcel appears when you add a parcel or is removed when you deselect a parcel.

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

Three files are downloaded: *Address.csv*, *Owner.csv*, and *Parcel.csv*. If the map is enabled to show neighborhood groups that are fully or partially within the notification area, a fourth file is downloaded: *Neighborhood Group Mapping.csv*.

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

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

The notification process is not part of the Oracle system.

13 Working with Reports

Generating Reports

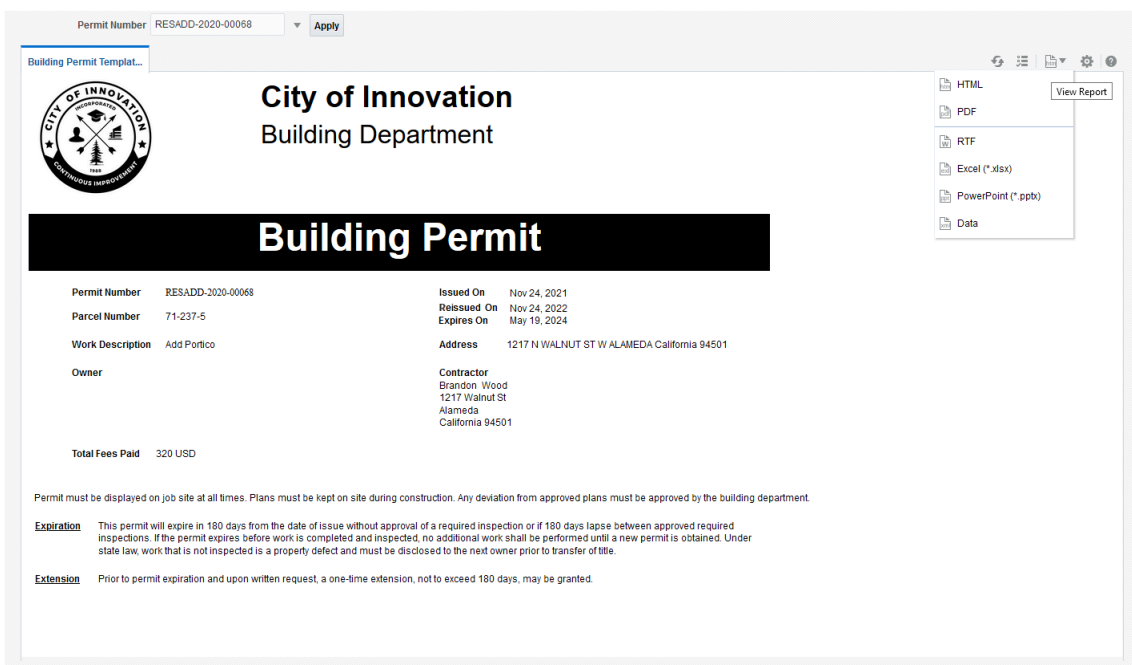
Agency staff have the option of generating BI Publisher reports from a central location instead of navigating to the various pages where reports are found. The report list includes all reports, such as permit activity, building permits, business license certificates, receipts, deposit slips, inspection summaries, code enforcement case history, and many more.

You can only access the reports that are available to you based on the permissions setup for the reports in the BI catalog. System administrators can generate all reports and also edit them. For more information about setting up permissions, see [Granting Catalog Permissions](#).

For a list of delivered reports, see [Permitting and Licensing Analytics](#).

This example illustrates the generated report for a building permit from the report list.

The report generated with the selected parameters appears on the left and the view options are accessible through the View Report menu on the right.



Here's how to generate a report from the Report List page:

1. Click the Reports and Analytics icon in the global header on the agency springboard. Select the **Report List** link. Or select **Common > Report List** in the Navigator.
2. Expand the Public Sector section in the left panel of the Report List page.
3. Click the category that the report is filed under. For example, you'll find the Building Permit Report in the Permits category.
4. Click the report name in the right panel. The report loads in a new browser tab.

5. Select values for the available parameters and click **Apply**. For example, if you're logged in as a cashier, you can enter the session ID and reconciliation ID for the Cashier Session Reconciliation Report. Processing generates the report in the browser window in HTML.
6. Click the **View Report** icon in the upper right corner of the page to open the generated report in PDF in your browser. You can also open the generated report as a file by selecting RTF, Excel, or PowerPoint. To open the report in XML without a stylesheet, select the Data option.
7. If you're a system administrator, you can click the **Actions** icon to edit the report.

14 Using Accessibility Features

Overview of Accessibility

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

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

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

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

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

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

Using General Keyboard Shortcuts

This topic lists and describes the supported general keyboard shortcuts.

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

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

Using the Keyboard with Data Collections

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

Tables

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

Country

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

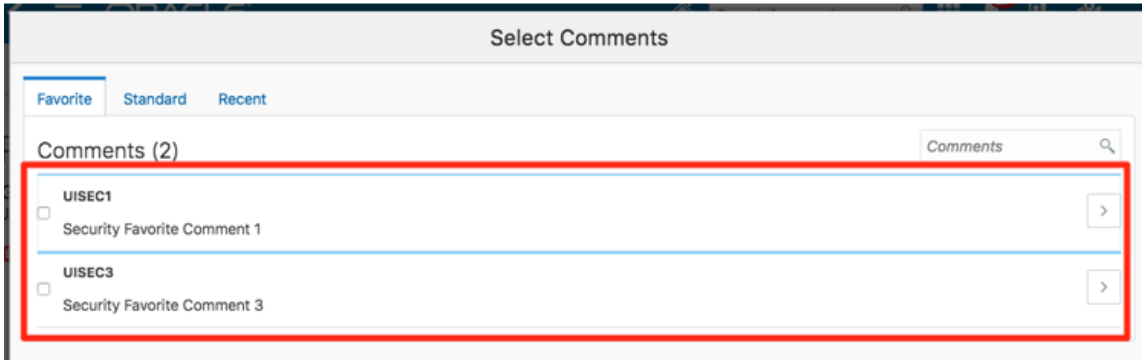
Page 1 of 22 (1-11 of 240 items) | 1 2 3 4 5 ... 22 >

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

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

List View

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



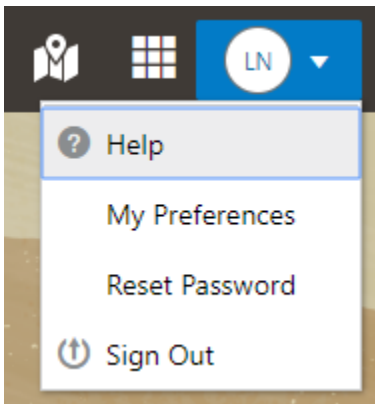
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the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

Using the Keyboard to Work with Page Controls

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

Buttons

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



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

Calendar

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

Auto Number Rule | Electrical Permit 🔍

* Valid from Date 📅

Valid to Date 📅

Public User Enabled

* Department 1

Workflow Space Name

Workflow Application ID

< July 2018 >

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

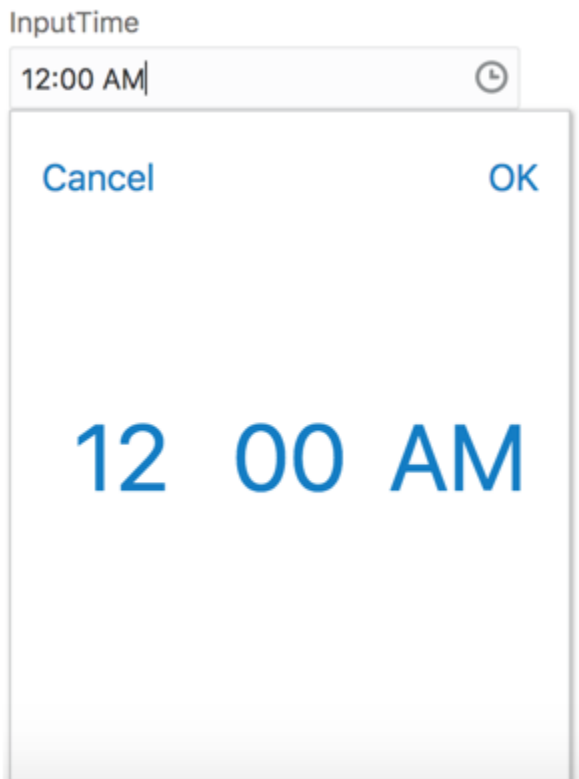
Today

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

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

Time

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



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

Accordion

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

Elements

- ▶ Predefined Elements
- ▲ User-Defined Elements

Group box

Text field

Number field

Date time field

Switch

Text area

Radio button set

Check box set

Drop-down list

Multi-Select list

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

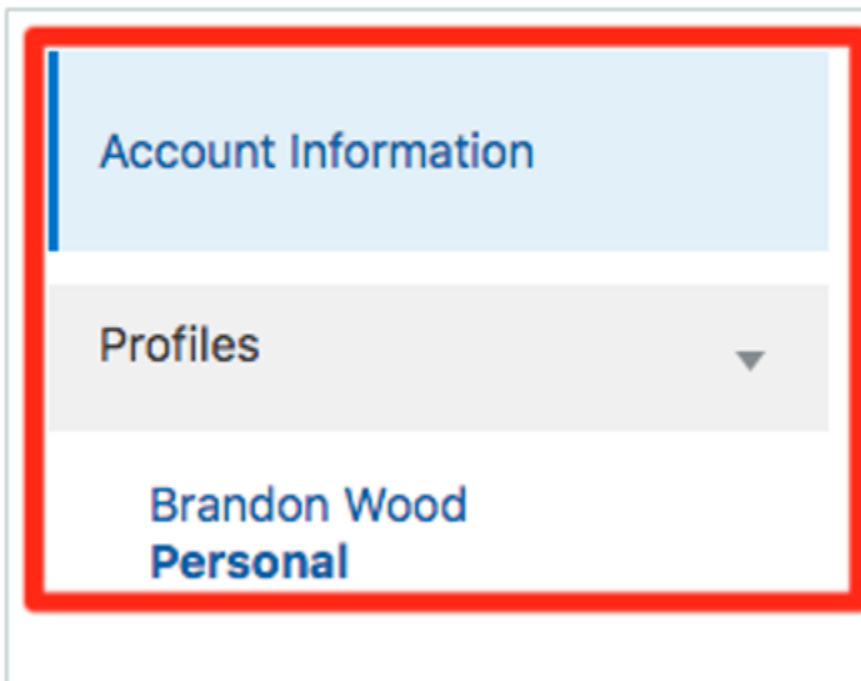
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift+Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move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

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

Navigation Lists

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

Manage Account



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

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

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

Tab Bars

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



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

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