

Oracle Public Sector Permitting and Licensing

**Using Community Development
Planning and Zoning**

25C



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25C

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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	<p>Select the phone type by clicking Mobile, Work, or Home. Mobile is the default option. Depending on agency setup, a mobile number is needed to opt into multifactor authentication using a phone.</p> <p>Enter the phone number and extension, if any. The country displays <i>US</i> for the United States, and the phone number field displays <i>+1</i> (plus one) to indicate the country prefix for the United States.</p>
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 checkbox that indicates **I have read and accepted the terms and conditions**. The registrant must select the checkbox 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 checkbox 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	<p>Click the Add Phone button to enter a phone number. Select the phone type by clicking Mobile, Work, or Home. Mobile is the default option. Depending on agency setup, a mobile number is needed to opt into multifactor authentication using a phone.</p> <p>Turn on the Default switch to designate the phone number as the default selection.</p>
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	View and upload files as attachments to the account.

Page Element	Description
	<p>Your agency controls whether attachments can be added to accounts on the Public User Setup page.</p> <p>For information about adding and managing attachments, see Working with Application Attachments.</p>
Terms of use	<p>Click the terms of use link to review the terms and conditions that the registrant accepted.</p> <p>For more information, see Setting Up Terms of Use.</p>

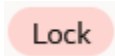

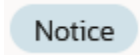
- To delete an item, click the **Delete** trash can icon.

Managing Account Conditions

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

Agencies define the conditions that their staff can apply to accounts. A condition's rules control which activities are limited by the condition. The conditions relate to objects such as addresses, parcels, transactions, business license credentials, and contractor licenses, in addition to accounts. For more information, see [Setting Up Conditions](#) and [Setting Up Credential Conditions](#).

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

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

Viewing Conditions and Condition Indicators

Here's how to view active conditions for a public user account:

1. Go to the Manage Account page for the public user.
 - Registered users sign in and click the account avatar with their initials in the global header on the registered user's landing page. They 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 Public User Access page displays summary information about public user accounts. If an account has active conditions, the badge for the most severe condition appears before the user's name. Search for the desired user account and click the row to view account details.
2. On the Manage Account page, go to the **Conditions** section.

For each applied condition, review the severity badge, name and description of the condition, priority, and when the condition was applied.

3. As agency staff, you can click the **Conditions** pencil icon button to open the account's Conditions page, where you can manage and apply conditions.
4. On the account's Conditions page, agency staff can find, resolve, and apply conditions.

In addition to searching for conditions, you can use these options to find conditions:

Page Element	Description
Sort By	Select a sort option: <ul style="list-style-type: none"> ◦ Applied Date ◦ Condition Name ◦ Display Message ◦ Priority ◦ Severity ◦ Status
Condition filters	Click the buttons to filter the list: <ul style="list-style-type: none"> ◦ Active - View only active conditions. ◦ Resolved - View only resolved conditions. ◦ All - View all conditions, including both active and resolved.

You can also click the **Export** button to download a file with the conditions.

5. For each condition in the list, review the severity badge, name and description of the condition, priority, and when the condition was applied.
6. Click the **Resolve** button to add a resolution action and close the condition.
7. Click the condition row to open the **Condition details** drawer, where you can review the applied condition rules and manage some condition details like the description and additional information.

The next instructions provide steps for adding conditions, resolving conditions, and reviewing.

Adding Conditions

Here's how agency staff can add account conditions:

1. Access the Manage Account page.
2. On the Manage Account page, go to the **Conditions** section.
3. As agency staff, you can click the **Conditions** pencil icon button to open the account's Conditions page, where you can apply conditions.
4. Click the **Add (+)** button.
5. On the **Apply new condition** drawer, you can review and provide condition information:

Page Element	Description
Condition Name	<p>Select one of the conditions that the agency has defined.</p> <p>After you select a condition, the condition information is brought in as it was defined by your agency.</p>
Display Message	Displays an informational message that also appears in the list of conditions for an account.
Severity	<p>Displays the severity of the selected condition:</p> <ul style="list-style-type: none"> ○ <i>Lock</i>: Suspends all operations and selects all condition rules for the condition. ○ <i>Hold</i>: Enables agency staff to select the rules that apply to the condition. ○ <i>Notice</i>: Functions as an alert and has no effect on operations.
Condition Rules	<p>Displays checkboxes for indicating which actions are blocked or prevented. when the condition is applied. If a checkbox is not selected, the action is permitted.</p> <p>The checkboxes are selected and read-only if the severity is <i>Lock</i>. They are hidden if the severity is <i>Notice</i>.</p> <p>If the condition severity is <i>Hold</i>, the selected check boxes are copied from the condition definition and you can deselect or select the rules.</p> <p>The checkboxes for these condition rules are visible only if the Apply Conditions to Transactions switch is turned on, except for Prevent Application Progress which is always visible.</p> <p>You must select at least condition rule:</p> <ul style="list-style-type: none"> ○ Prevent Application Progress ○ Prevent Workflow Advancement ○ Prevent Issue or Final ○ Prevent Payment ○ Prevent Inspection Schedule

Page Element	Description
	<ul style="list-style-type: none"> ○ Prevent Inspection Result ○ Prevent Final Inspection <p>The condition rules for inspections are only applicable to permits and business licenses with inspections.</p>
Priority	Select <i>High</i> , <i>Medium</i> , or <i>Low</i> . The priority is informational only.
Description	The default description comes from the agency's condition definition, but you can change this description as needed.
Additional Information	Enter any additional information or notes regarding the condition that you're applying.

6. Use these fields to indicate whether the condition applies to transactions associated with the account.

Page Element	Description
Apply Condition to Transactions	<p>Applies the condition to new transactions that will be associated with the account. You turn off the switch if you want the condition to be applied only to the account you're working with.</p> <p>When you turn on this switch, the complete set of condition rule checkboxes becomes visible in the Condition Rules section of the page. If the severity is <i>Hold</i>, you can accept the default selections or select which condition rules to apply.</p> <p>If this switch is off, the only relevant condition rule (and the only visible condition rule checkbox) is Prevent Application Progress.</p> <p>The default setting for this switch comes from the condition definition, but you can change the setting.</p>
Include in-process transactions	Available only if the Apply Condition to Transactions switch is turned on. Turn on this switch to apply the condition to all active applications for this account.
View Impacted Transactions	Click this button to view a list of the in-process applications that will be affected by the condition if you turn on the Include in-process transactions switch.

7. Click **Apply**.

Resolving Conditions

Here's how to resolve an account condition:

1. Access the Manage Account page.
2. On the Manage Account page, go to the **Conditions** section.

3. As agency staff, you can click the **Conditions** pencil icon button to open the account's Conditions page, where you can resolve conditions.
4. Click the **Resolve** button for the condition that you want to resolve.
5. On the **Resolve condition** drawer, provide this information:

description of how the condition was resolved in the **Resolution Action** field. The **Resolve conditions applied to transactions** switch is turned on by default, which resolves the condition that was initially applied automatically to the transactions when this condition was created.

Page Element	Description
Resolution Action	Enter a description of how the condition was resolved.
Resolve conditions applied to transactions	<p>Turn on this switch to resolve the condition that was applied automatically to the transactions when the account condition was created.</p> <p>You turn off the switch if you want to resolve this condition alone, without affecting the transactions associated with the account.</p>
View Impacted Transactions	Click this button to view a list of the applications that will be affected by resolving the condition.

6. Click **Resolve** to apply the resolution and close the drawer.

The status of the condition is updated to *Resolved* with a resolved date.

Overview of Application Access for Contacts

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

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

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

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

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

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

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

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

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

Application Access Details

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

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

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

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

Primary Contact

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

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

Overview of Public Landing Pages

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

Public user landing pages have elements such as the global header with a welcome message and the Apply and Guide buttons, alerts, search fields, attention needed card, action tiles, map, and so forth.

The registered user landing page showing the Apply, Guide buttons, global search, Quick links and Account summary buttons, attention needed card, the landing page cards in the More actions section and the map.

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Q

h

Welcome to City of Innovation

Apply

Guide

Online Planning and Permits

Streamline the application and review process for your project. [Read More](#)

Alert

Please be advised that our office will be closed on April 1st, 2025. We will resume regular operations on April 2nd, 2025.

Permits

Q Search

Quick links

Account summary

Attention needed

Total 52.55 USD

3 Applications

Make a Payment

Failed inspections

2 Inspections

Reinspect

More actions

Estimate Fees

Estimate fee amount for the application.

Explore Your City

View property and permit information on a map.

Report an Issue

Report an issue that you care about.

Request Inspections

Displays a page to request inspections for a public...

Request Inspections

Ensure compliance with regulations and standards.

Track My Issues

Page to view incident list.

Resolve an Issue

Page to mark issues as resolved.

Make CE Payments

Page to make code enforcement related...

Deposit Accounts

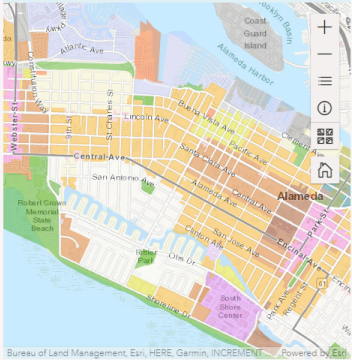
Displays the deposit accounts associated with...

Deposit Account User Invites

Show details of deposit account authorized user...

Search for a street address or parcel

Search by address or parcel



Bureau of Land Management, Esri, HERE, Garmin, INCREMENTAL, Powered by Esri

Landing Page Configuration

The elements on landing pages vary depending on how you configure the pages.

For information on configuring landing pages, see [Setting Up the Landing Page for Anonymous Users](#) and [Setting Up the Landing Page for Registered Users](#).

For information on setting up alerts to appear on the landing pages, see [Defining Alerts](#) and [Working with Ad Hoc Communications](#).

Tiles on the Anonymous User Landing Page

Also known as guests, anonymous public users are residents, business owners, contractors, and so on, who have not signed in or are not registered. From the anonymous user landing page, they can perform common tasks such as starting an application, accessing an interactive guide that provides recommendations for application types, or accessing an interactive map of the city.

As delivered, the anonymous user landing page includes these tiles:

Page Element	Description
Public Reports	Provides access to all public reports available for the anonymous user.
Estimate Fees	Provides access to the Estimate Fees page, where the user can choose an application type and estimate fees for an application.
Explore Your City	Provides access to a map where the anonymous user can search for and view property details, including applications related to the property.
Report an Issue	<p>Starts the process for reporting a code enforcement issue. During the reporting process, the public user identifies the type of issue, provides the issue location, describes the issue, and answers any additional questions that the agency has configured.</p> <p>See Reporting Issues.</p>
Make CE Payments	<p>If you click the tile as an anonymous user, you are prompted to sign in. Once signed in, you can make online payments for code enforcement fees.</p> <p>See Making Code Enforcement Payments</p>

Tiles on the Registered User Landing Page

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

By default, the registered user landing page has a global header with a welcome message and the **Apply** and **Guide** buttons. The **Apply** button provides access to a page where the user can choose an application type and then start an application. The **Guide** button provides access to a questionnaire. The user provides information about a project, and the guide uses that information to recommend application types.

Note: Your agency defines the guide questionnaire using Oracle Intelligent Advisor. If your agency is not using Oracle Intelligent Advisor, this tile will not appear. The questionnaire comes from the Oracle Intelligent Advisor policy model that you specify for the *Permits* offering, if one exists. If there's no offering-level policy, the questionnaire comes from the agency-level Oracle Intelligent Advisor policy model.

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

Menu Link	Description
Request Inspections	Displays the page where you can request one or more inspections for a transaction. Registered public users can also add inspections from their Inspections list page by selecting the Inspections tile.
Track My Issues	View status and other information about issues that the user reported while signed in. See Tracking Issues .
Resolve an Issue	Claim responsibility for an issue, and perform actions such as viewing notices or appealing a citation. See Resolving Issues .
Deposit Accounts	Displays a list of the user's deposit accounts, including the account number, name, and status, in addition to the available balance. From the list, the user can access deposit account details.
Deposit Account User Invites	Displays a list of the invites that the user has received to manage deposit accounts. It displays the account number and name, email address and invite status. From the list, the user can access the invite details. Owners of deposit accounts can void the invite. Invited users can accept or decline the invite.

Attention Needed Cards

Attention needed cards provide information about applications at a glance with recommended actions. Only information for a registered user's own applications is reflected in the cards. Applicants and contacts with application access can take the recommended actions to clear any outstanding issues.

Applicants can view a all of their applications on their Applications list page, including the ones for which they are contacts. Agencies must enable full application access for contacts to see these applications in the list.

These attention needed cards may be available after your agency runs a process to identify the issues to bring to your attention:

Card	Description
Make a Payment	Provides the fees information at a glance and a button to go directly to the payment page when the registered user has a pending payment.

Card	Description
	Applicants see the total amount due, number of applications with fees due, and a button to navigate to the Make Payments page, where they can review and select application fees for payment. For more information, see <i>Making Payments</i> .
Failed Inspections	<p>Indicates that an active application has at least one failed inspection and no reinspections have been scheduled yet for the failed inspection.</p> <p>The Reinspect button opens the registered user's My Inspections page with a filter to show only failed inspections for active applications that need to be scheduled for reinspection. For more information, see .</p>

3 Completing a Planning Application

Security Details for Completing a Planning Application

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

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

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

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

Choosing an Application Type

Your agency sets up application types for permit applications, planning applications, business license applications. Business license applications include consultations and contractor registration. Before starting an application, users must choose what type of application they need. The apply page provides multiple tools to help users choose the appropriate application type.

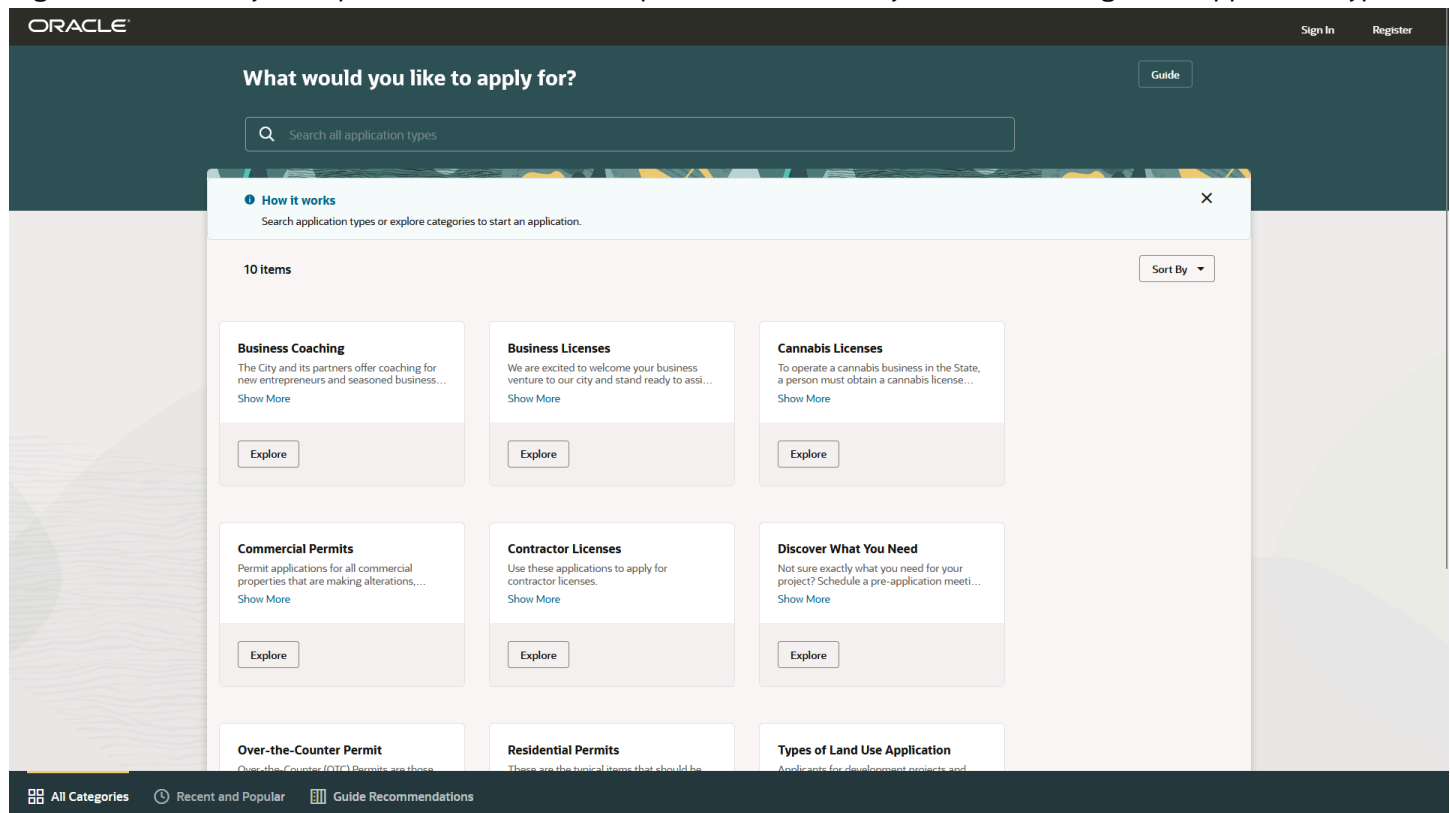
Working With the Apply Page

The 'What would you like to apply for?' page or the apply page offers these options for finding application types:

Option	Description	Available to Which Users
Search	Search for an application type by name.	All
Recent application types	View a maximum of five application types for the applications that you most recently submitted.	All
Popular application types	View a maximum of five application types that have been used most frequently in the last 30 days.	Registered public users and agency staff
Guide Recommendations	Answer questions about your needs, and the guide provides recommendations regarding the necessary application types.	Registered and anonymous public users

This example illustrates the apply page for an anonymous public user. A **How it works** banner at the top of the page has instructional text on how to use the search and explore functions. Cards below display different application categories. The user can also sort the items based on the category name. This page has a **Guide** button for

registered and anonymous public users. In this example, the user has not yet started looking for an application type.



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

For additional information, click the **Show More** link that appears at the end of the description on the cards. A **Category details** drawer opens with more information. Use the **Explore Applications** button on the drawer or the **Explore** button on the tile to search for applications in the selected category of applications.

In this example, the user has selected an application, and is viewing its details on the Application details drawer. This application has the option for estimating the fees before starting the application process.

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< Over-the-Counter Permit

Q

Search application types in Over-the-Counter Permit

How it works

Start an application by selecting an application type or select All Categories to search for any application. For business licenses, you can apply for more than one at a time.

3 Items

OTCPermit

Over-the-Counter(OTC) Permits are those that can typically be reviewed and approved on the date of submission due to their "simple" scope of work and ease of review.

Residential Solar

Permits are required for all new solar installations, repairs or alterations to existing solar system.

Water Heater

Water heater permit application

Application Details

Residential Solar

Permits are required for all new solar installations, repairs or alterations to existing solar system.

All Categories

Recent and Popular

Cancel

Estimate fees

Apply

For information about setting up the application type categories, see [Setting Up Application Display Groups](#).

Accessing the Apply Page

Anonymous and registered public users can access the Apply page from the landing page by clicking the **Apply** tile. Anonymous users can explore application types, but they are prompted to sign in or register before actually starting an application.

Registered users and agency staff have these additional options:

- On the landing page or agency springboard, select the *Start an Application* quick action in the **I Want To** field, then click the **Go** button.
- On the Applications page, click the **Apply** button.
- On the Explore Your City map (registered users) or the Main Map (agency staff), click the **Apply** button after selecting a parcel.

Searching for Application Types By Name

To search for an application type by name:

1. Click in the search field and enter the application type name, for example, **permits**.

You can sort the results on the basis of application type and description, using the **Sort by** button.

Note: When you are searching for Business Licenses applications, you have an option to apply for multiple applications at the same time.

Click the application link to open an **Application details** drawer to view the application description. There is a **Show More** button which gives more details about the application.

If there is a fee associated with the application, you can also estimate the fees, even before starting the application process. Click the **Estimate fees** button, to launch the guided questionnaire in a new window to estimate the fees for the selected application.

2. To start an application, click the **Apply** button.

Searching for Popular and Recent Application Types

To search for popular and recent application types:

1. Click the **Recent and Popular** link.
2. Review the lists of popular and recently used application types.

Up to five application types each from the Recent and Popular categories are displayed. They can include a mix of business license, permit, and planning application types.

List	Description
Recent	Lists the application types (up to five) for the applications that the current user most recently submitted.

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

Click the application link to open an **Application details** drawer to view the application description. There is a **Show More** button which gives more details about the application.

If there is a fee associated with the application, you can also estimate the fees, even before starting the application process. Click the **Estimate fees** button, to launch the guided questionnaire to estimate the fees for the selected application.

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

Using a Guided Questionnaire to Get Application Type Recommendations

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

To find application types using a guided questionnaire:

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

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

2. Step through the questionnaire.

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

3. Optionally save the recommendations.

A registered user follows these steps to save the recommendations:

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

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

An anonymous user follows these steps to save the recommendations:

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

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

Viewing Saved Recommendations from the Guided Questionnaire

Public users can view guided questionnaire recommendations that they save.

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

1. Sign in.
2. Click the **Apply** tile on the registered public user landing page.
3. Click **Guide Recommendations** link at the bottom of the page to open the **Guide Recommendations** page.

All previously saved recommendations are listed under their nicknames. You can collapse, expand or delete a section. Click the application link from the expanded view, to open the **Application details** drawer. Here, you have the buttons to estimate fees when applicable, and continue to apply.

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

1. Enter the **Acknowledgement Number** that was emailed to the user when the recommendations were saved.
2. Enter the **Email** that the user provided when saving the recommendations.
3. Click **View Recommendations**.

Getting an Online Fee Estimate

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

Estimating Fees Using A Simplified Intake Form

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

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

On the Apply page, click the hyperlink for the application to open an Application Details drawer. All applications that have fees associated with them displays an **Estimate fees** button in the drawer. Click the **Estimate fees** button to open a simplified intake form.

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

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

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

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

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

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

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

Completing an Application

Agencies configure the specific sections and fields for each type of permit or planning application form. Regardless of these specifics, the general interface for filling out an application form is consistent.

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

This example illustrates an in-progress permit application form. The left pane shows text entry fields and the right pane shows the tabs that open the steps for each page of data collection. In this example, the right pane shows Step 2 of 8, and the left pane shows the Applicant Information page.

Residential Electrical

Applicant Information

Applicant

Select an applicant

Applicant Name
Abby Scott

Create New

Clear

Salutation

Name
Abby Scott

Suffix

Business Name

Title

Email and phone

Email
abby.scott@oracle.com

Country
US

Phone

Extension

Address

Country/Region
Canada

Address Line 1
1401 Fernside Blvd

2 | 8

Application Information

Applicant Information

Property Information

Electrical Information

Primary SubApplication

Attachments

Fee Summary

Review

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General Navigation Controls

The application form includes these buttons for general navigation:

- The **Continue** button moves the user through the steps, from one page to the next.

You can also click the step name in the right pane to move to next or previous steps.

- The **Cancel** button closes the form in a pending status.
- The **Save** button lets users save their progress without submitting the application.

You'll see warnings when you save an incomplete application, but you can still save the application and complete it later.

- On the final step, a **Submit** button replaces the **Continue** button.

Submitting an application initiates the workflow for the application. Registered public users can't make changes to submitted applications.

Data Entry Pages

An anonymous public user who starts an application must sign in before the application form appears. Users who haven't previously registered must register before accessing, filling out, and submitting an application.

The application begins with data entry steps that the agency configures. There can be one or many data entry steps. Agencies configure the sections and fields for each data entry step. For more information, see *Intake Form Designer Topics*. See *Using Predefined Field Groups* for more information about the sections that might be used in an application form.

Data entry sections are generally self-explanatory, but the following information includes some notes about common page controls.

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

Grids

Some intake forms contain one or more grids, which are page controls that enable you to collect and display data in a tabular fashion, using rows and columns. Although the buttons may vary slightly depending on whether you're adding new data or selecting from available saved data, the basic controls work like this when the intake form is displayed using the classic interface.

To add data to a grid:

1. Click the **Add** button, which sometimes shows only a + (plus sign) or includes text like **Create New**.

A drawer opens where you can enter new data.

You may have the option to add data by clicking a different button to select from saved or available data.

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

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

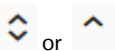
Note: Some fields are configured to be read-only and can't be updated.

Click the **Add** button on the drawer to save the data to the grid.

3. Repeat the steps when adding multiple rows.

4. Click **Continue** to move to the next page in the application form.

Other controls on the grid may enable you to perform actions:

Page Element	Description
	Click the icon button next to the column name to sort the column data in ascending or descending order.
Row actions	Available row actions may include Delete (garbage can icon) to remove the data in a row and Edit (pencil icon) to update data in a row.

Applicant

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

When a registered public user starts an application, this information is prepopulated, and certain identifying fields are read-only.

- From the **Select an applicant** drop-down list, agency staff can select an applicant.
- The **Create New** button enables agency staff to register a new applicant.
- Updates made to the address, phone, or email when applying can be saved to the user's account profile.

Agency staff members who complete an application on behalf of a member of the public must identify the applicant by selecting an active profile for an existing registered user or by registering a new user.

When registering a new user, the staff member can continue with the application after entering and submitting the required registration information. A confirmation email is sent to the account email address so the user can complete the registration process by clicking the provided link and setting an account password. The registration is valid even if the agent abandons the application.

Registered users and agency staff with appropriate permissions can update the applicant's address, phone, or email in subsequent applications and optionally save the changes to the user's account profile. System administrators can also update account information.

See *The Public User Registration Process*.

Application

The **Application** section includes the application information like the record ID and a field where applicants can enter a description. Agency staff can provide the date the application was received while entering data into the form. The received date field isn't available for applicants applying online.

The **Received Date** determines the effective-dated fee schedule that will be used when calculating fees for the application.

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

Related Transactions

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

- Primary
- Subapplication
- Linked

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

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

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

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

For more details, see [Working with Related Transactions](#).

Uploading Attachments

The Attachments step in an application intake form provides a grid where you can upload files relevant to your application, such as documents or images. Depending on the agency setup for permit, planning, and business license applications, the Attachments section may display required document cards with the types of documents that are required for an application type and the stage in the application process at which they are required.

This example illustrates the Attachments step in an intake form for a permit application type with required documents displayed using the Redwood Experience. The document is required before the application can be submitted and in this case, has been uploaded and appears in the attachments grid.

Residential Roof

Attachments

Attachments

Required documents (1 of 2 uploaded)

You must attach the documents that are required for an application, otherwise the step can't be completed. Upload the file to provide the required document.

+

View Override History

Attached

Documents • Plans

Required Application Step: Submittal

Upload More

Pending

Correspondence

Required Application Step: Issuance

Upload

Attachments



Q Search

2 Items

+

Download

Delete

<input type="checkbox"/>	File Name ↕	File Size ↕	Description ↕	Uploaded By	Uploaded On	Protected ↕	Required ↕	Actions
<input type="checkbox"/>	 ContractorCertificate.pdf	793.83 KB	Roofing contractor certificate.		3/19/25 5:27 PM			...
<input type="checkbox"/>	 aa.png	255.12 KB			1/29/25 8:43 AM		Yes	...

Cancel

Save

Continue

4 | 6

Application Information

Applicant Information

Property Information

Attachments

Fee Summary

Review

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Note: If you add attachments before the application has been saved, the upload action prompts the application to be saved first.

Depending on your permissions for each uploaded file, you can view details, preview, download, or delete the attachment. After you submit the application, the files including required documents that you added appear in a list on the Attachments page in the application's detail pages.

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

Here's information about how to upload an attachment to an application intake form in the **Attachments** table:

Page Element	Description
	<p>Click the Add icon button to select a file in File Upload dialog box. Click Open.</p> <p>On the New attachment drawer, enter a description and click Upload.</p> <p>The attachment appears in the attachments table.</p>
Attachment information	<p>Review the information for each uploaded file:</p> <ul style="list-style-type: none"> • Small preview image • File Name - The name of the uploaded file. • File Size - The size of the uploaded file. • Description - The description entered when the file was uploaded. • Uploaded By - The user who uploaded the file. • Uploaded On - The date and time when the file was uploaded. • Protected - Indicates whether the file has security settings enabled. • Required - Indicates whether the attachment was uploaded as a required document and satisfies document category requirements set up by the agency.
	<p>Depending on your permissions for managing the attachment, select an available action:</p> <ul style="list-style-type: none"> • View Details - Click to view the attachment details. You can also click the attachment row to view details. • Download - Click to download a copy of the attachment. Bulk download is also available. • Preview - Click to view a large preview image. • Delete - Click to remove the attachment from the application attachments table. Bulk delete is also available.

The **Required documents** collapsible section appears when the agency has enabled required documents for an application type. For more information, see [Working with Required Documents](#).

For more information, see [Setting Up Required Documents](#) and [Working with Application Attachments](#).

Terms and Conditions

If a data entry step includes the Terms and Conditions section, public users must agree to the terms before continuing past that step.

Agency staff can't accept terms on behalf of a public user, so this section is hidden from agency staff. Instead, users are prompted to accept the terms when they first sign in.

For more information, see *Managing Public User Accounts* and *Setting Up Terms of Use*.

Contacts

The Contacts section lists people who are contacts for this specific application. These people can be, but aren't required to be, the applicant's profile contacts.

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

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

Here's general information about contacts:

- Select an existing contact from a list, or enter information for a new contact on the Contact Details page.
- The applicant is automatically added as the primary contact in the Contacts section, but you can add or select a different primary contact. You can change the contact type, but you can't remove the applicant contact. You can also change the primary contact in the application details after submission if you are the applicant, primary contact, or business owner for business license application.
- The page where you enter or edit contact details includes explanatory text to ensure that you are aware of the type of access the selected contact type confers. Applicants and agency staff can elect to provide more access to the contact.
- All application contacts must have a contact type that describes the role of the person relative to the specific application. Different contact types have different levels of application access, as set up by your agency. When you add a contact to an application, you select a contact type, but you can upgrade the level of application access.
- When you add a new contact, select the **Add this contact to the applicant's account** checkbox to replicate them to the applicant's list of profile contacts. Applicants and system administrators only have the option to update contact information and save updates on the user's profile.
- If configured by your agency, the system sends an email notification to contacts on the intake form upon application submission as well as to new contacts when they are added to the application after submission.
- The applicant can never be made inactive on an application whereas other contacts can.
- Contact information for the contractor entered in the Contractor section in the application appears in both the Contractor and Contacts sections.

Furthermore, permit and planning application contacts have different levels of application access than do license application contacts:

- When you add a new contact, you can see the level of access each contact type confers—**Full** or **None**. You must select an agency-defined contact type but you can give the contact full access, which is similar to applicant-level access.
Applicants and contacts with full access can also make a contact inactive. Inactive contacts can't access the application. This change can be made in the permit and planning application details.
- If the contact type is configured to allow permit or planning application access, and the contact email matches the account email for a registered user, then that registered user can access the permit or planning application after it's been submitted.

Fee Summary

The Fee Summary page displays all fees and their status (for example, paid or due) for the application.

This example illustrates the Fee Summary step on an application intake form, where application fees are due and additional fees may be assessed later.

ORACLE

SA

Residential Electrical

Fee Summary

Fee Summary

Additional fees may be assessed later

Total Fees

50.00 USD

Balance Due

50.00 USD

Fee Items	Amount	Currency	Status
Application Fee	50.00	USD	Due

Cancel

Save

Continue

7 | 8

Application Information

Applicant Information

Property Information

Electrical Information

Primary SubApplication

Attachments

Fee Summary

Review

For more information about fees and payments, see [Working with Fees and Payments](#).

Review

A **Review** step appears after the last data entry step for an application. The page for the Review step shows all of the data entry sections on a single, long page, where you can still make updates.

Click the **Submit** button after providing any missing information.

Click the **Cancel** button to exit the application without submitting it.

Stopping the Submission Process

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

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

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

Additionally, your agency can configure a Business Rules Framework event to automatically perform actions when the application is successfully submitted. You use the following events to configure the business rule for business license, permit, and planning applications:

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

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

Entering Contractor Information on Permit and Planning Applications

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

Applicants who self-identify or are identified by agency staff as contractors (or their authorized agents) are required to select a contractor license. Applicants can search by license number, business, or owner to retrieve information about the license from the agency's main contractor records, if the information already exists there. If the agency integrates with an external licensing body, the information can be retrieved from the licensing body's records.

When applicants add the contractor license from the agency's contractor records, they select at least one contact person from a list of verified contractors associated with the license. Once the applicant selects **Done** for the license information, the selected contacts also appear in the **Contacts** section of the application. Contractor contact access to an application can be updated in the **Contacts** section.

Applicants who are not contractors or authorized agents, such as homeowners, can optionally add contractors to their applications. The same is true for agency staff who are applying on behalf of this type of applicant. Only system administrators can modify contractor information in an application.

If the agency's offerings include Business Licenses, agency staff only can see the business license or in-progress business license transactions associated with the contractor license in the Contractor grid during permit and planning application intake as well as in the application details after submission.

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

Working with Validations

Agencies may make a contractor license required for specific permit, planning, and business license application types, by turning on the switch to **Require at least 1 contractor license** in the application designer under the contractor properties for Contractor field group. When the agency activates the requirement, the applicant must provide a contractor license to submit the application. For more information about setting up this validation, see [Using Predefined Field Groups](#). Applicants who self-identify or are identified by agency staff as contractors (or their authorized agents) are always required to select a contractor license.

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

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

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

4 Using the Agency Springboard and Worklists

Using the Fusion Applications Homepage

The Fusion Applications homepage serves as a landing page for agency staff to manage their work.

On the Fusion Applications homepage, the agency staff can use the Permitting and Licensing group, to access the various apps, such as Permits, Planning Applications, Business Licenses, tasks, worklists, as well as the Agency Springboard. For information about the Agency Springboard, see [Using the Agency Springboard](#).

The Quick Actions panel on the left provides quick access to actions, such as starting an application, scheduling an inspection and making payments. Click a link to access the related page.

You can also use the **Navigator** icon to access all permitting and Licensing pages using a hierarchical menu. You can personalize the default Fusion Home page experience by hiding or reordering the delivered apps. For more information, see Applications Common, Configuring and Extending Applications, topic: Configure the Navigator and Page Entries on the Home Page for Navigation.

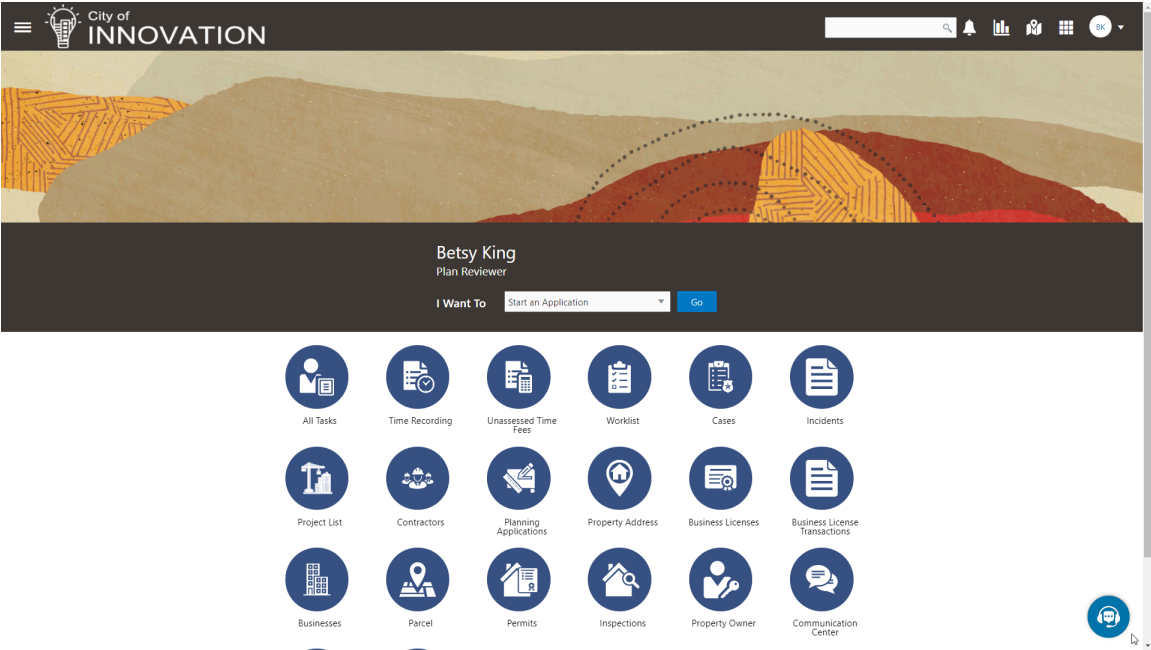
Using the Agency Springboard

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
	Click the Back icon to return to the previous page. The header doesn't include this icon when you're on the springboard.
	Click the Navigator icon to access pages using a hierarchical menu.
	Click the Home icon to return to the Agency Springboard. The header doesn't include this icon when you're already on the springboard.
Global Search (unlabeled search box)	Enter search terms, then press enter or click the search icon to search for any of these objects: <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.

Page Element	Description
	<ul style="list-style-type: none"> • 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. • 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 choose an application type and start an application. See Choosing an Application Type .
<i>Estimate Fees</i>	Opens the Estimate Fees page, where you can choose 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 .
<i>Report an Issue</i>	Opens the Select an Issue Type page, where you can begin 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.

Using the Planner Worklist

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

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

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

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

The planner worklist has the following tabs:

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

Tab	Displays	Available Actions	Additional Information
Planning Activities	<p>Open activities that are associated with the current user's assigned planning applications.</p> <p>Activities are open if they are pending or in progress. Also, incomplete application review activities are open if they haven't been resubmitted.</p>	<p>Update</p> <p>See <i>Working with Planning Application Activities</i>.</p>	<p>Completing an activity removes it from this list, but does not affect the application status.</p> <p>Activities are initially sorted by due date, with the soonest due date at the top of the list.</p> <p>This tab has subtabs that further filter the activities by due date: <i>Overdue</i>, <i>Due Today</i>, <i>Due This Week</i>, and <i>Due Next Week</i>.</p> <p>Subtab action menus have the same actions as the main tab. To return from a subtab to the main tab, click the Back icon next to the Search icon.</p>
Plan Reviews	<p>All applications owned by the current user that have tasks pending for review.</p> <p>The Plan Reviews tab displays a set of essential details related to the plan review, including the:</p> <ul style="list-style-type: none"> • application ID and type • application status • application description • property information • plan review details • assigned date and due date • icons to the left to indicate if any fees are due or conditions have been applied. 	No actions.	<p>This tab is visible only if the user has the following:</p> <ul style="list-style-type: none"> • Role: <code>ORA_PSC_PLAN_REVIEWER_JOB</code> • Access to the list: <code>PSC_ACCESS_MY_PLAN_REVIEWS_TASK_LIST_PRIV</code>
Inspections	<p>All applications owned by the current user that have tasks in the Inspection status.</p>	No actions.	<p>This tab is visible only if the user has the following:</p> <ul style="list-style-type: none"> • Role: <code>ORA_PSC_BUILDING_INSPECTOR_JOB</code> • Access to the list: <code>PSC_ACCESS_MY_INSPECTIONS_TASK_LIST_PRIV</code>
Incoming Tasks	<p>All active applications assigned for the group.</p>	<p>If the incoming task is for the group then the planner has the following actions:</p> <ul style="list-style-type: none"> • Claim • Reassign <p>If the task is already assigned to the planner, then the planner has the following actions:</p>	

Tab	Displays	Available Actions	Additional Information
		<ul style="list-style-type: none"> Update Release Reassign <p>If you update the task by assigning or reassigning to a planner, the workflow task – Assign Planner will be updated to <i>Planner Assigned</i> status using the Business Rules Framework configuration. For more details, see Using Workflow.</p>	
Calendar	<p>Shows the meeting schedules for the agency on a calendar or on a list.</p> <p>Planner meetings show the schedules for preapplication, planning application, and public hearing.</p>	<ul style="list-style-type: none"> View meetings assigned to the planner logged in. View all meeting schedules. 	<p>Calendar View shows the meetings scheduled for the month. You can choose to view the calendar by month, week, or day.</p> <p>List view shows the list of preapplication and planning application meetings in the Meetings tab and the list of public hearing meetings in the Hearings tab.</p> <p>See the section <i>Viewing Meetings on the Calendar</i> in Working with Meetings.</p>
All Applications	<p>All planning applications for the agency.</p> <p>Comments and attachments pertaining to all applications.</p> <p>This tab includes a map view for displaying application locations.</p>	<ul style="list-style-type: none"> Send Message See Working with Communications. Reassign Planner See Working with Planners. Copy Application See Copying an Application. Withdraw Application See Withdrawing an Application. Update Description 	<p>This tab is visible to all users who have the <i>Planner</i> Job Function (ORA_PLANNER).</p> <p>Review or add comments and attachments to all applications. See Working with Application Attachments and Working with Comments.</p> <p>Agency staff with the role ORA_PSC_PNZ_MANAGEMENT_ELEVATED_ACCESS can update the associated objects of the planning application that are assigned to other planners.</p> <p>A condition icon is displayed on the row if an application has a condition applied. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p> <p>For more information see, Working with Application Conditions.</p>

Tab	Displays	Available Actions	Additional Information
All Activities	All planning activities for the agency.	View or Update See <i>Working with Planning Application Activities</i>	<p>This tab is visible to all users who have the <i>Planner</i> Job Function (ORA_PLANNER).</p> <p>Agency staff with the role ORA_PSC_PNZ_MANAGEMENT_ELEVATED_ACCESS can update the associated objects of the planning activities that are assigned to other planners.</p> <p>This tab has subtabs that further filter the activities by due date: <i>Overdue</i>, <i>Due Today</i>, <i>Due This Week</i>, and <i>Due Next Week</i>.</p> <p>Subtab action menus have the same actions as the main tab. To return from a subtab to the main tab, click the Back icon next to the Search icon.</p>

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

Viewing Additional Application Information

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

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

Managing Tasks

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

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

- The business license lifecycle
- The contractor license lifecycle
- The permit lifecycle

- Inspections
- Plan reviews
- The planning application lifecycle

Security Details for Managing Tasks

This section describes important security roles, requirements, or considerations specific to managing tasks.

Permit application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Access Task Management Worklist	Access the task management worklist.	PSC Inspections Supervisor PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Business Analyst PSC Building Inspector PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician

Planning application

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

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

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

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

Reviewing and Managing Tasks

The Task Management page enables agency users to view a list of all task types assigned to them.

1. On the agency springboard, select the **All Tasks** tile.
2. Use the search, filter, and sort options to refine the list of tasks as needed.
3. Use these fields to review task information:

Page Element	Description
Fees/Conditions	If any fees are due or conditions are applied, icons indicating this appear in the left column of the grid. See the section, "Viewing Additional Transaction Information" for more information.
Task Name	Identifies the nature of the task to be performed. Values include <i>Application Acceptance</i> , <i>Permit Completion</i> , and so on.
Task ID	The unique identifier of the task.
Application ID	The application ID for the individual submitted transaction being worked, such as the permit ID.
Application Type	The type of application being worked, such as <i>Solar Permit</i> , <i>Retail Business License</i> , and so on.
Application Status	Displays the task status. Different types of tasks can have different statuses. For example, permit tasks may have a status of <i>Assigned</i> , while inspection tasks can have the status <i>Scheduled</i> , which is not applicable to permit workflow tasks.
Relationship Type	Displays the type of relationship such as primary application or subapplication.

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

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

Viewing Additional Transaction Information

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

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

5 Managing the Applications List

Security Details for Managing Applications for Planning and Zoning

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

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

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

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

Managing Applications

View application data and statuses for permits and planning applications using the applications list page. You can perform a variety of actions, such as paying fees and accessing detailed application information for the applications in the list.

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

Note: This topic focuses on the lists of permits and planning applications featuring the Redwood Experience. You can view business license activity on the License Applications page in the Redwood Experience. For information about viewing business license transactions, see *Managing License Applications*.

Here are some of the things you can do on the applications list for agency staff:

- Manage application activity.
- Create or resubmit permit and planning applications on behalf of applicants.
- Manually enter fee payments on behalf of applicants.
- Access details about permit and planning application activity.
- View the conditions applied on the permit or planning applications, if any.

You can also cancel pending applications, copy applications, or link permit applications. For information about canceling a pending application, see *Canceling an Application*. For information about copying an existing permit, planning application, or a preapplication into a new application, see *Copying an Application*. For information about creating new subapplications from the primary permit application that you are working with, see *Working with Linked Permits*.

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

This example illustrates the Permit Applications page for agency staff, showing in-progress applications.

ORACLE

Permit Applications

ApplyMake a Payment

In Progress Applications

Search

78 items

Application ID	Application Type	Status	Conditions	Relationship Type	Relationship Details	Property	Parcel	Balance (USD)	Actions
86	Permit Application Demo	Submitted		Primary	View Subapplications	1708 2ND ST, ALAMEDA, CA 94501		420.00	...
SIGN-2024-00008	Commercial Sign	Inspection				1 PENUMBRA PL 1311, ALAMEDA, CA 94502		Paid	...
SOLAR-2024-00019	Residential Solar	Permit issued				1 APPEGATE WY, ALAMEDA, CA 94502		Paid	...
SOLAR-2024-00018	Residential Solar	In process						Paid	...
OTC-2024-00004	OTCPermit	Submitted				3021 BAYO VISTA AV, ALAMEDA, CA 94501			...
ELEC-2024-00011	Residential Electrical	Pending				3021 BAYO VISTA AV, ALAMEDA, CA 94501			...
104	STBlitzAllCCA	Pending		Primary	View Subapplications				...
103	STBlitzAllCCA	Pending							...
102	STBlitzAllCCA	Pending							...
101	STBlitzAllCCA	Pending		Subapplication	Primary: 99				...

Licenses

Permits

Planning Applications

All

Registered User's Application List

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

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

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

Note: If the applicant or the agency staff removes a contact from an application, then the application is no longer listed on the user's Applications page. Applications are not listed for those associated contacts who are neither the primary contact nor have application access. For information about adding and removing contact users, see *Working with Application Contacts*.

The payments banner at the top of the page displays information if there is a payment due for the submitted permit or planning applications. The payment due details include the total amount payable, the number of applications the user is associated with, and a **Make a Payment** button to pay for all or selected applications. Applicants and contacts can pay for all or selected applications. For more information, see *Making Payments*.

Users can make a payment for individual applications by clicking the fee amount link for the application or by clicking the three-dot actions button and selecting the option to pay fees. The **Pay** button is also available in the application details on the Fees and Payments page. For more information, see *Working with Fees and Payments*.



Using the Applications List

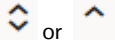
1. Select the **Permits** or **Planning Applications** tile on the agency springboard.

You can also select the **Business License Transactions** tile to go to the License Applications page. For more information, see *Managing License Applications*.


2. Click the tab at the bottom of the page for the type of application you want to view:
 - **Licenses:** View a list of business license or contractor registration applications.
 - **Permits:** View a list of permit applications.
 - **Planning Applications:** View a list of planning applications.
 - **All:** View a list showing all application types.
3. You can use these actions to display permits or planning applications:




Page Element	Description
Search	Enter alphanumeric characters in the Search bar to apply a filter to applications in the list. The applications that meet the search criteria are displayed on the page.

Page Element	Description
	<p>The default search facet displays <i>In Progress Applications</i> to show active applications that are not in a closed or end status. For example, <i>Pending submittal</i>, <i>Payment pending</i>, <i>Submitted</i>, <i>Inspection</i>, and so on.</p> <p>When you search on dates, use this format: MM/DD/YYYY.</p> <p>Search results display only the primary address for the permit or planning application. You can confirm the correct application by clicking the row for the permit or planning application and reviewing all of the associated addresses in the application details.</p>
Apply	<p>Click the button to open the page that asks What would you like to apply for? and search for or select the type of application you want to apply for, including contractor registration or business license, permit, or planning applications.</p> <p>For more information, see Choosing an Application Type and Completing an Application.</p>
Make a Payment	<p>Click the button to open the Make Payments, where agency staff can initiate a payment on behalf of a customer.</p> <p>For more information, see Making Payments.</p>
	<p>Click the Download icon button to export the list of applications to a .csv file.</p>
	<p>Click to display the Columns window, where you can personalize the display of the grid columns.</p> <p>You can:</p> <ul style="list-style-type: none"> ○ Select columns to display. ○ Deselect columns to hide. ○ Use drag and drop to adjust the left-to-right order of the columns. <p>You can personalize the column view for each offering type. For example, you can have different column settings for the License Applications page and the Permits Applications page.</p> <p>The personalized view applies only to the signed in user, and the modifications are saved in the browser cache for each device.</p> <p>When personalizing columns:</p> <ul style="list-style-type: none"> ○ You can freeze only the Balance and Actions columns. ○ You can't freeze columns on the left side. ○ Adjustments to column size aren't saved.

Page Element	Description
	<ul style="list-style-type: none"> ○ Search criteria isn't saved. ○ To restore defaults you'll need to delete the browser cache on the current device.
	Click the sort icon buttons next to the column names to display the column information in ascending or descending order.

4. Let's take a look at the list of applications and the information available for each application.

Page Element	Description
Application ID and Application Type	View the application ID and application type of the listed applications.
Status	View the badge with the application status, for example, <i>Submitted</i> or <i>Permit Issued</i> .
Conditions	<p>View the name of the most severe condition applied to the application, if there's more than one condition applied. For example, Lock, Hold, or Notice.</p> <p>Click the condition name link to open a Condition summary drawer, where you can view the details of the conditions applied to the application.</p>
Relationship Type and Relationship Details	<p>(Permits only) View the relationship type of the permit application: <i>Primary</i> or <i>Subapplication</i>. View detail of the primary or subapplication, along with a link to any available linked applications.</p> <ul style="list-style-type: none"> ○ Primary Applications <p>Click the View Subapplications link to open the View subapplications drawer, which lists the selected primary application at the top, followed by all the linked applications.</p> <p>The View subapplications drawer allows you to:</p> <ul style="list-style-type: none"> - Identify the application that you are currently viewing from the icon  next to it. - Establish a link with another existing application or remove link from a linked application. See the Applying for Subapplications section. ○ Subapplications <p>Click the Primary: <application ID> link to access the primary permit application that is linked to the selected subapplication. The system displays <i>Primary: Not defined</i> until the subapplication is linked to a primary permit.</p>
Property Parcel	The application list displays the primary address and the parcel ID, when available. When the application has more than one property or parcel, the primary property or parcel number appear as links. Click the link to review all of the addresses and parcel information associated with the application on the Property Information page.
Description	View the description of the application entered on the application form or on the Overview page in the permit or planning application details.

Page Element	Description
Applicant	View the name of the applicant. This may not be the same as the person who created the request.
Submitted On	View the date when the application was submitted.
Expires On	View the date when the application expires.
Planner	(Planning applications only) View the planner assigned to a planning application. This field appears only on the Planning Applications list.
Total Fees (USD) and Balance (USD)	Review the total fees that are applicable to the permit or planning application and a fee balance if the total has not been paid. Click the balance amount link to open the Pay fees drawer.
	<p>Click the Resubmit icon button to resubmit the application.</p> <p>The application status is <i>Pending Submit</i> because there may be a problem initiating workflow. Click the Resubmit button to retry initiating workflow.</p> <p>Resubmitting the application doesn't affect the fee calculations.</p>
	Click the Expiration icon button to view expiration information on the Expiration drawer.
	<p>Click the three-dot Actions icon button to view the available actions for the application. Select from these options:</p> <ul style="list-style-type: none"> ◦ (Permits only) <i>Apply for Subapplication</i>: Click to create up to 5 subapplications. You can copy over the details from the primary permit application to each of the new subapplications. For details, see the section Applying for Subapplications in the topic <i>Working with Linked Permits</i>. ◦ <i>Copy Application</i>: Click to copy the details of the selected application to a new application. For more information, see <i>Copying an Application</i>. ◦ (Permits only) <i>Print Permit</i>: Click to print the permit when the status of the application is <i>Permit Issued</i>. For more information, see <i>Viewing the Permit Overview</i>. ◦ <i>Withdraw Application</i>: Click to withdraw an application. For more information, see <i>Withdrawing an Application</i>.

Updating an Application

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

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

Accessing Application Details

1. Select the **Business License Transactions, Permits, or Planning Applications** tile on the agency springboard.
2. Click the row for the selected application on the respective applications page.

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

Copying an Application

Applicants can copy their own applications from the Applications page. Agency staff with the appropriate permissions can copy applications from the License Applications, Permit Applications, Planning Applications, and All Applications list pages.

Here's how to copy an application:

1. Select the **Business License Transactions, Permits, or Planning Applications** tile on the Agency Springboard.
2. On the License Applications, Permit Applications, Planning Applications list page, find the application that you want to copy.


To copy a consultation application, see [Working with Consultation Outcome](#).

3. Click the **Actions** icon button in the row of the application you want to copy.
4. Select the **Copy Application** menu option.
5. On the **Copy application** drawer, review the details and make any changes to the populated information:

Page Element	Description
Copy From	Displays the application ID and the application type of the source application.
Copies	<p>Use the Increment and Decrement buttons to increase or decrease the number of new copies that you would like to make.</p> <p>By default, this is set to 1 copy, and you can select up to 5 copies at once. Agency staff with the appropriate access can change the maximum number of copies that can be created at a time. For details, see Setting Up Agencies.</p>

Use the **Copy To** section to enter information for the new copies:

Page Element	Description
Expand All, Collapse All	Click the button to expand or collapse the application information respectively for each copy.
Applicant	<p>Click the drop-down list to select a different applicant if you don't want the source applicant to be the applicant for your new application. The source applicant is the default selection.</p> <p>Note: Registered public users can't change the applicant.</p>
Create Applicant	Click the button to register a new applicant if you don't find the applicant you want in the drop-down list of applicants.
Application Type (enterable)	Select the application type for the new application from the drop-down list. The application type from the source application is the default value.
Description	Review and optionally modify the description of the source application to create the description for the new application.

Page Element	Description
Link to <Source Application ID>	Turn on this switch to link the new application to its source application.
	Click the Delete icon button to remove the application from the Copy To list. Each application in the Copy To list has a separate delete icon. Whenever an application is deleted from the Copy To list, the sequence is refreshed and the new count appears in the Copies field.

6. Use the **Copying** section to control which information gets copied to the new application.

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

Note: Custom fields in the intake form are not controlled by these options. If the new application type is the same as the source application type, then data from custom fields is always copied. Custom data is not copied when the application types are different.

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

Page Element	Description
	<ul style="list-style-type: none"> If agency staff copies from a regular application to another regular application, the applicant information is not copied, and therefore the authorized agent data isn't copied. If the new application type doesn't include the contractor and authorized agent predefined field groups, the data isn't visible in the intake form, but it's still copied to the new transaction.
Property	<p>Select this checkbox to copy the property information from the source application.</p> <p>If the new application type doesn't include the Property predefined field group, property information is not visible in the intake form, but it's still copied to the new transaction.</p>

7. Click **Save.**

A summary page appears that lists all the applications which were copied, and which couldn't be copied. Each application that failed to copy has an **Open Application** button.. Click the button to open a new application intake form and complete the applications one at a time.

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

8. From the **Review page, you can take a final look at the application before submitting. You can navigate to each section to enter any missing information and submit the form.**

In the new permit or planning application intake form, you can see the information copied from the source application. You can also add further details to the new application. Depending on agency setup, the intake form may contain a **Fees and Payments** section that displays the types of fees and the total fees associated with the new application.

The **Contacts** section displays the contact information that is copied over from the source permit or planning application. If you selected a new applicant in the **Copy To** fields, then the contact list in the new application adds the new applicant as the primary contact. If you retained the source applicant, the contact list adds the source applicant as the primary contact. The primary contact has the same application access as the applicant regardless of the access defined for their contact type.

Canceling an Application

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

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

You can cancel an application with a *Pending* or *Payment Pending* status on the License Applications, Permit Applications, or Planning Applications page using the **Cancel Application** action. When you cancel the application, the system status changes to *Voided*.

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

Security Details for Canceling an Application

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

Planning application

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

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

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

Canceling Pending Applications

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

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

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

Note: When you cancel an application, you can't recover it.

6. Click the **Cancel Application** button.

Withdrawing an Application

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

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

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

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

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

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

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

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

Security Details for Withdrawing an Application

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

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

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

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

Withdrawing In-Progress Applications

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

To withdraw an application:

1. Select the **Planning Applications** tile on the agency springboard.

2. On the **Planning Applications** page, click the **Actions** icon button in the row of the application you want to withdraw.
3. Select the **Withdraw Application** menu option.
4. Here's what you can do on the **Withdraw application** drawer:
 - **Manage Links** - This button is for permits only. Click to manage the primary application and subapplications that are affected when you withdraw the permit.
 - **View Details** - Review the fees due and click the button to go to the Fees and Payments page in the application details to manage fees.
 - **Withdrawal Reason** - (Required) You must enter a withdrawal reason before you can withdraw the application.
5. Click **Withdraw Application** to permanently withdraw the application.

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

You can also withdraw an application from the Overview page in the application details. On the applications list page, click the row for the application that you want to withdraw to access the application details.

Reopening a Permit or Planning Application

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

Agency administrators with the appropriate access can reopen applications from the Permit Applications or Planning Applications list pages, or the Overview page in the application details, using the Reopen Permit or Reopen Application option. You can reopen permits that have an expired, completed or closed, or withdrawn status. You can reopen the planning applications in the completed and withdrawn statuses. Once reopened, the agency administrator can update the permit or planning application to add a new inspection or plan review, or perform other actions based on the application status.

Here's how to reopen a permit or planning application:

1. Select the **Permits** or **Planning Applications** tile on the Agency Springboard.
2. On the Permit Applications or Planning Applications list page, find the permit, planning application, or preapplication that you want to reopen.
3. Click the three-dot **Actions** icon button in the row of the application that you want to reopen.
4. Click the **Reopen Permit** or **Reopen Application** menu option for a permit or planning application, respectively.
5. On the **Reopen application** drawer, use the following fields to update the permit or application information:

Page Element	Description
Update Workflow Activity Name	Select a workflow task from the available options. Note: Tasks that are within the parallel and inclusive gateways are not available. You must select the gateway entry node or a human task available on the page and navigate to the desired task.

Page Element	Description
Update Transaction Status	By default, this field displays the status in which the permit or application was before it was reopened. From the drop-down menu, select the status to which you want to update the permit or planning application.
Update Expiration Date	(Permits only) Enter a new date to provide an updated expiration date. Note: Only permits that had an associated expiration date associated with it before it was reopened will display this field.
Reopen Reason	Enter a reason for reopening the permit or planning application.

6. Click **Reopen**.

You can also open the permit or planning application from the Overview page in the permit or planning application details, respectively.

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

6 Managing Planning Application Details

Navigating to Planning Application Details

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

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

This example illustrates the navigation panel with menu links for accessing planning application detail pages. The links are described in the surrounding text.

City of

INNOVATION

Go to Planning Applications

Administrative Use Permit • AUP-2025-0003 Submitted

1711 2ND ST, ALAMEDA, CA 94501

3 conditions • Lock

Actions

Pay Fees

Overview

Application

Application Details

Property Information

Attachments

Conditions3

Related Transactions

Fees and Payments

Progress

Workflow

Activity Tracking

Reports

Overview

Application

Submitted By
sam cook on 5/7/25

Received Date
4/10/25

Planner

Description
New administrative use permit application.

Assign Planner

Update Details

Contacts

Primary Contact
Carol Ott

Applicant
Carol Ott

Phone

ORACLE

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Here's how to access the application detail pages:

1. Select the **Planning Applications** tile on the agency springboard.
2. On the Planning Applications page, click the row for an application.
3. Navigate to application information using the menu links in the left panel.

The information about a preapplication or planning application comprises these pages:

Page Name	Description
Overview	View the information highlights regarding the selected planning application with links to more detail. See Viewing the Planning Application Detail Overview .
Application Details	Review information captured during the application intake that is specific to the planning application type. For example, site data, site use, existing setbacks, proposed setbacks, parking, and so on. See Viewing Application Information .
Property Information	View parcel data from the planning application and a map of the parcel location. See Working with Property Information .
Attachments	View a list of files and upload or download documents on this page. You can also view a list and upload required documents on this page. See Working with Application Attachments .
Conditions	Review conditions placed on the planning application or person that must be resolved to complete the planning application process. See Working with Application Conditions .
Related Transactions	View the transactions or applications linked to the selected application including those transactions that are in turn linked to the transaction you have linked. See Working with Related Transactions .
Fees and Payments	Review fees assessed and payments due. You can also add additional fee items and pay fee items from this page. See Working with Fees and Payments .
Billing Accounts	View the organization or customer billing information specified during the application intake. See Working with Billing Accounts .
Workflow	View the workflow status of each task as defined by the agency using Oracle Integration Cloud (OIC). See Using Workflow and Managing Tasks .
Preapplication Outcome	Displayed for preapplications only, this link takes you to the Preapplication Outcome page in the classic interface. Review the list of the required planning applications and comments entered by the assigned

Page Name	Description
	<p>agency planner. On this page, the applicant creates links to existing applications based on the list in the required application summary.</p> <p>See Working with Preapplication Outcome.</p>
Activity Tracking	<p>Available for agency planning department staff. Use activity tracking to help work through a list of time-sensitive tasks that affect the progress of a planning application.</p> <p>Overview of Activity Tracking for Planning Applications.</p>
Reports	<p>Available for agency staff. Generate a report from the report object for a planning application, review, and print it for dispatch. Agency staff can also manually create ad hoc reports for an application.</p> <p>See Working with Reports.</p>
Plan Reviews	<p>Manage plan reviews required for the planning application type, based on your agency's setup.</p> <p>See Plan Review Overview.</p>
Conditions of Approval	<p>Apply or manage a set of conditions of approval to a submitted planning application. Only assigned planners can manage the conditions of approval for their applications.</p> <p>See Working with Conditions of Approval.</p>
Decision and Hearing	<p>Review information about public hearings, such as schedule and decisions.</p> <p>See Working with Public Hearings.</p>
Status History	<p>View the history of application status changes. Whenever the status changes for a transaction, the change is recorded and viewable in the details for the application. The status history is display-only.</p> <p>See Viewing Application Status History.</p>
Time Recording	<p>Agency staff with permissions manage time entries for the planning application.</p> <p>See Adding Time Entries and Viewing Recorded Time for an Application.</p>
Contacts	<p>Review and add contacts to the planning application.</p> <p>See Working with Application Contacts.</p>
Contractor	<p>Identify the contractors who are performing the work identified in the permit or planning application, and indicate whether the applicant is an authorized agent of the contractor (for example, an employee of the contractor).</p> <p>See Working with Contractors and Agents in Applications.</p>
Meetings	<p>Review information about meetings and scheduling meetings.</p> <p>See Working with Meetings.</p>

Page Name	Description
Projects	View the summary of projects associated with a planning application, if applicable. This menu link takes you to the Projects page in the classic interface. The planning application can be assigned to multiple projects. See Viewing Project Summaries .
Communication	View a list of communications associated with this planning application and send ad hoc email messages and notifications. See Working with Ad Hoc Communications and Working with Communications .
Comments	Review or add comments pertaining to this planning application. See Working with Comments .

Changing the Applicant on an Application

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

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

Here's how to change the applicant:

1. In the left navigation panel of the application details, expand the **People** section.
2. Click the **Contacts** tab.
3. On the Contacts page, click the **Add New Contact** button if the new applicant isn't yet a contact on the application or click **Select from saved contacts** to select a contact already in the system. The new applicant must be registered with the agency using a matching email address.
4. Click the three-dot **Actions** menu button for a contact in the list to select from the available actions.
5. Select *Make Applicant*.
6. On the **Confirm applicant update** modal page, review and enter this information:

Page Element	Description
New Applicant	Displays the name of the contact who will be the new applicant.
Previous Applicant	Displays the name of the person who was formerly the applicant.
Active	Turn on this switch to make the previous applicant an active contact for the application. If you leave this switch off, the previous applicant becomes an inactive contact without any application access.

Page Element	Description
Contact Type	Select a contact type. When you turn on the Active switch, you must select a contact type and application access level for the previous applicant, otherwise the contact type is <i>Previous Applicant</i> without any application access.
Access	Update the default access level for the contact type, if the previous applicant is still an active contact. Select from these options: <ul style="list-style-type: none">○ <i>Full</i>○ <i>None</i> If the previous applicant is an inactive contact, the access level is <i>None</i> .

7. Click **OK**.

The **Role** is updated to reflect which contact is the current *Applicant*.

Related Topics

- [Working with Application Contacts](#)

Viewing the Planning Application Detail Overview

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

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

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

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

This example illustrates the Overview page in the Redwood Experience user interface for a planning application with a balance due. The attention card provides information including a link to pay fees.

City of INNOVATION

Go to Planning Applications

Conditional Use • CUP-2025-0001 Payment pendi...

1370 3RD ST, ALAMEDA, CA 94501

Actions

Pay Fees

Overview

Application

Application Details

Property Information

Attachments

Conditions

Related Transactions

Fees and Payments

Fees and Payments Due 6,215.00 USD

Progress

Activity Tracking

Reports

Plan Reviews

Overview

1 item needs your attention

Balance Due

6,215.00 USD fee is due.

Pay Fees

Application

Created By
sam cook on 6/16/25

Received Date
6/16/25

Planner

Description
Temporary conditional use of the empty lot.

Expiration Date
9/14/25

Assign Planner

Update Details

ORACLE

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Using the Overview Page

On the Overview page, you can review these details or perform these actions:

- **Actions** menu - Click the **Actions** button in the application banner. Depending on the application status and your role, agency staff can perform these actions: Copy Application, Withdraw Application, or Cancel Application.

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

- **Application** section - Review details or update the following information in this section.

Page Element	Description
Submitted By	Review the name of the person who submitted the application and the date when it was submitted.
Received Date	<p>Review the date when the planning application was received. Agency staff enters the date, which is on or before the submission date, when filling out the intake form on behalf of the applicant. Agency staff can update the received date here on the Overview page by clicking the Update Details button.</p> <p>For applicants submitting their application online, the received date field isn't available in the intake form or on the Overview page.</p> <p>If the planning application is set up for activity tracking, the received date is used as the base date for calculating the activity due date after the application is submitted. The due date is recalculated when you make changes to the received date.</p>
Completed Date	Review the date the application was completed on the Status History page.
Planner	<p>Review the name of the planner assigned to the planning application or preapplication. For more information, see Working with Planners</p> <p>Only agency staff can assign or reassign a planner to the application by clicking the Assign Planner or Reassign Planner buttons.</p> <p>After a planner is assigned, registered users view one of the following details:</p> <ul style="list-style-type: none"> ○ Planner's name and their email ID ○ No detail (the <i>Planner</i> field isn't displayed) ○ Planner's name only ○ Planner's name and a general email ID of the agency <p>Agency administrators configure the above display options on the Agency Information – Planning and Zoning Options page. See Setting Up Agency-Level Options for Planning Applications.</p>

Page Element	Description
Description	A description of the application. Enter or update the description of the application on the Overview page by clicking the Update Details button. Only agency staff can add a description.
Expiration Date	<p>Review the expiration date of the application.</p> <p>If the Extend link is available next to the Expiration Date field, agency staff can enter a new expiration date that allows more time before the application expires.</p> <p>Expiration notifications appear below the expiration date. Depending on how the agency set up the expiration rules for the planning application type, you might see a notification that the application expires in the displayed number of days.</p> <p>For more information about working with application expiration, see Expiration Overview and Working with Application Expiration.</p>

- **Contacts** section - Review details or update the following information in this section:

Page Element	Description
Primary Contact	View the primary contact and their contact information, such as phone, email and address.
Applicant	View the applicant's name.
View Details	<p>Click the button to go to the Contacts page, where agency staff with permissions can update the primary contact and applicant.</p> <p>For more information, see Working with Application Contacts.</p>

- **Fees and Payments** section - Review details or update the following information in this section.

Page Element	Description
Total Fees	View the total fees paid, amount due, and the date and amount of the last payment.
Total Paid, In Review, or Balance Due	View the amount paid, in review, or immediately due. If there's a balance due, you can click the Pay Fees button in the recommendation card at the top of the Overview page to start the payment process.
View Details	<p>Click the button to go to the Fees and Payments page.</p> <p>For more information, see Working with Fees and Payments.</p>

Working with Planners

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

Only agency staff can assign or reassign a planner to the application by clicking the **Assign Planner** or **Reassign Planner** buttons on the Overview page.

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

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

When your agency sets up the Business Rules Framework to trigger the advancement of the workflow task, the event can also generate a communication to the applicant and the assigned planner. For example, once a planner is assigned and the Activity Tracking is updated to complete, the Business Rules Framework will automatically advance the workflow to the next task and send a communication. For more details, see [Business Rules Framework Overview](#) and [Setting Up Business Rules](#).

Security Details for Working with Planners

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

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

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

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

Assigning a Planner

1. Select the **Planning Applications** tile on the Agency Springboard.
2. Click the row for a planning application on the list page.
3. On the Overview page, click the **Assign Planner** button in the **Application** section.
4. On the drawer that opens, select the row for the planner to assign them to the planning application.
5. Click **Assign** to save your selection.

If a planner has already been assigned, you can click the **Reassign Planner** button to select a different planner. Click the **View History** button on the drawer to view the planner history. The list includes past planner assignments, the dates they were assigned, their job title, and the planner currently assigned to the planning application.

Viewing Application Information

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

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

Updating Application Details

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

1. Select **Planning Applications** on the agency springboard.
2. Click the row for an application on the Planning Applications page.
3. On the Overview page, expand the **Application** section in the left-panel navigation menu.
4. Click the **Application Details** menu link.
5. On the Application Details page, click the **Edit** button to update information.
6. Click the **Update** button to save.

Working with Property Information

Property information displays the properties associated with an application.

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

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

Security Details for Working with Property Information

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

Permit Applications

Primary Role	Access Description	Associated Job Roles and Abstract Roles
Anonymous access	View property information on permits.	All users including users without login

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Permit Property Management	Manage property information until it isn't closed.	PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Permits Management with Elevated Access	Manage property information at all times.	PSC Permits Supervisor PSC System Administrator

Planning Applications

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

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

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

Viewing Property Information

The Property Information page displays a list of properties associated with the application.

You can find information about permit and planning application property information displayed using the Redwood Experience user interface here. For information about business license property information, see [Working with Business Location Information](#).

Whether property information was added during the application intake process or after application submittal, agency staff can manage property information on the Property Information page.

1. Select the **Permits** or **Planning Applications** tile on the agency springboard.
2. On the Permit Applications or Planning Applications list page, click the row for the permit or planning application you are working with.
3. Under the expanded **Application** menu section in the left navigation panel, click the **Property Information** menu link.
4. Here's the property information you can view on the Property Information page:

Page Element	Description
Type	Displays a badge with the property type. Values can be <i>Property</i> , <i>GIS</i> , or <i>Sketch</i> . From the map, the user can select a property, a GIS object, or use a sketch to mark the property location.
Address Condition (address condition) Primary Address	Displays the property address. Click the address link to open the Address Details page; the link is only available for agency staff who have access to the Address or Parcel setup reference pages. For more information, see Setting Up Property Addresses . Registered public users see the address or parcel without the link. Indicates whether an address condition has been applied to the address. Indicates whether the address is the primary address. Value is <i>Yes</i> or <i>No</i> .
Parcel Condition (parcel condition) Identifier Description Primary Parcel	Displays the parcel number. Click the parcel link to open the Parcel Details page; the link is only available for agency staff who have access to the Address or Parcel setup reference pages. For more information, see Updating Parcel Information . Registered public users see the address or parcel without the link. Indicates whether a parcel condition has been applied to the parcel. Only applicable to GIS objects, based on agency setup. The unique identifier is used for the selected GIS object on the map. Displays a description of the parcel. Indicates whether the parcel is the primary parcel. Value is <i>Yes</i> or <i>No</i> .
Owner Primary Owner	Displays the property owner name. Indicates whether the owner is the primary owner. Value is <i>Yes</i> or <i>No</i> .
Comments	Displays comments about the property. Comments associated with the property can only be viewed by agency staff.
Actions	Click the Edit button to open the Property details drawer.

Page Element	Description
	Click the Delete button to remove the property information.

Adding Property Information

Here's how to associate a property with an application:

1. On the Property Information page, you can select a property to associate with the application in three ways:
 - o Enter information to search for and select an existing property in the type-ahead field, **Select an address or owner or a parcel**. Each property in the list displays a parcel, address, and owner combination, and you can enter any of this information to find the property you want to select.
 - o Click the **Select from List** button to search for and select 1 or more properties on the **Select properties** drawer. Click **Done** to save and close the drawer.

Note: Due to the number of possible properties, your currently selected properties may not all show up as selected in the drawer. Click the **Selected (n)** button on the Select properties drawer to view a list of your currently selected properties (where *n* is the number of properties listed on the Property Information page).

- o Click the **Select from Map** button to view a map and select the location.

Note: Depending on agency setup, you can select GIS objects and create sketches on the map when you click **Select from Map**. All of the properties, objects, and sketches appear as rows in the Property list.

2. Click the **Create New** button to add a property that doesn't exist in the system already.

Modifying Property Details

On the Property Information page, agency staff can modify property details.

Here's how to edit property details:

1. On the Property Information page, go to the **Actions** column in the list of properties.
2. Click the **Edit** pencil icon in the row of the property that you want to modify.
3. On the **Property details** drawer, you can update property information, including these details:
 - o Parcel information
 - o Land use
 - o Address
 - o Building address and location information
 - o Owner information
 - o Contact information

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

4. Click **Save**.

Deleting a Property

You can delete any or all of the listed properties on the Property Information page, however, the agency may have defined minimum and maximum property rows for property information in the setup.

Here's how agency staff can remove properties from the application:

1. On the Property Information page, go to the **Actions** column in the list of properties.
2. Click the **Delete** icon in the row of the property that you want to remove from the application..

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

3. Click **Remove** to confirm the permanent removal.

Note: Removing a property automatically deletes any associated property conditions that are applied to the permit application that you are working with.

You can also click the **Delete** button on the **Property details** drawer to delete the property from the application.

Working with Application Attachments

Attachments available in the application details provide supporting documentation reviewed by agency staff when processing an application. This topic discusses the Attachments page for permit and planning applications displayed using the Redwood Experience.

The page tabs and elements may vary on the Attachments page depending on the type of application or record. For example, the Attachments page for a permit displays the **Permit**, **Inspection**, and **All** tabs. The Attachments page for a planning application displays the **Planning Attachments** and **Reports** tabs.

This example illustrates the Attachments page in the permit application details, described in the surrounding text

Attachments

Permits

Inspection

All

> Required documents (1 of 1 uploaded)

Attachments

Q Search

2 items



+

Download

Delete

Mark as Seen

Download

<input type="checkbox"/>	Upload	File Name	File Size	Description	Uploaded By	Uploaded On	Category	Actions
<input type="checkbox"/>		3D_Property.pdf	360.53 KB	Plan documents for property	sam cook	4/14/25 6:15 PM	Documents	...
<input type="checkbox"/>		ContractorCertificate.pdf	793.83 KB	Contractor certificate in good standing	sam cook	4/9/25 6:15 PM	Documents	...

Here's information about the permit attachments tabs:

- The **Permits** tab displays attachments added through the permit's Attachments page and required documents, if set up by your agency.

For more information about required documents, see *Working with Required Documents*.

- The **Inspection** tab displays attachments that building inspectors uploaded in the Inspector Application related to the inspection checklists, inspection checklist items, or overall inspection.

For more information about Inspector Application for permit and business license inspections, see *Performing Inspections on the Inspector Application* and *Working with Inspection Details*.

- The **All** tab displays attachments added from all sources, including the Attachments page, the Workflow page, the Inspector Application, plan reviews, and web form responses.

For more information about managing attachments for a permit workflow task displayed using the Redwood Experience, see *Using Workflow*.

Here's information about the planning applications attachments tabs:

- The **Planning Attachments** tab displays attachments added through the planning application's Attachments page and required documents, if set up by your agency.

For more information about required documents, see *Working with Required Documents*.

- The **Reports** tab displays reports generated and completed by the agency staff for a planning application. For example, conditions of approval reports and hearing timeline reports are added to the Attachments page so that these can be accessed by the applicant.

For more information about reports, see *Working with Reports*.

The actions you can perform depend on your permissions.

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.

Permit Applications

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Apply Permit Duty PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician
PSC Add Permit Attachments	Add permit attachments.	PSC Inspections Supervisor PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer 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

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

Planning Applications

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.	PSC Registered Public User

Primary Role	Access Description	Associated Job Roles and Abstract Roles
	View all attachments on applications for which the user is the applicant.	
PSC Agency Planning and Zoning Inquiry	View planning and zoning attachments.	PSC Agency Staff – All agency users
PSC Add Planning and Zoning Attachments	Add planning and zoning attachments.	<p>PSC Planning Application Management with Elevated Access</p> <p>PSC Planning Attachments User Duty</p> <p>PSC System Administrator</p> <p>PSC Zoning Administrator</p> <p>PSC Planning Assistant</p> <p>PSC Associate Planner</p> <p>PSC Geographical Information System Administrator</p> <p>PSC Finance Administrator</p> <p>PSC Economic Development Officer</p> <p>PSC Cashier</p> <p>PSC Principal Planner</p> <p>PSC Plan Reviewer</p>
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.	<p>PSC Planning Attachments User Duty</p> <p>PSC Apply Planning and Zoning Duty</p> <p>PSC Zoning Administrator</p> <p>PSC Planning Assistant</p> <p>PSC Associate Planner</p> <p>PSC Geographical Information System Administrator</p> <p>PSC Finance Administrator</p> <p>PSC Economic Development Officer</p> <p>PSC Cashier</p> <p>PSC Principal Planner</p> <p>PSC Plan Reviewer</p>

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



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

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

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

Actions for Working with Attachments

Depending on your permissions for working with attachments, you can perform these actions:

Page Element	Description
Search	Enter text to the search field to find attachments in the table.
	<p>Click to add or upload a file as an attachment to the application on the Permits or Planning Attachments tab.</p> <p>You can also add attachments in the Required documents section. For more information, see Working with Required Documents.</p>
Download	Select one or more attachment rows in the table and click to download the files.
Delete	<p>Select one or more attachment rows in the table and click to delete.</p> <p>For permits, the Delete action appears only on the Permits tab. For planning applications, the Delete action appears only on the Planning Attachments tab. Furthermore, the security associated with your user ID may limit which actions are available to you.</p>
Mark as Seen	Select one or more attachment rows in the table and click to indicate that the attachment was seen or read on the Permits or Planning Attachments tab.
	<p>Click the three-dot actions icon in each attachments row to select and perform an action. Actions may include:</p> <ul style="list-style-type: none"> • <i>View Details</i> • <i>Download</i> • <i>Preview</i> • <i>Delete</i> • <i>Mark as Seen</i> <p>For permits, the delete action appears only on the Permits tab. For planning applications, the delete action appears only on the Planning Attachments tab. Furthermore, the security associated with your user ID may limit which actions are available to you.</p>




Viewing Attachment Details

Here's information about the attachments page in the detail pages for a permit application.

Click the **Attachments** link in the left panel to open the Attachments page. You may need to expand the section that includes the link.

On the Attachment page, you can view the attachments in each of the tabs. Here are the various page elements available when working with attachments.

Page Element	Attachments Tab	Description
Preview image	Permits, Inspections, All Planning Attachments, Reports	Click the small preview image to open the Attachment details drawer. On the drawer, 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.
Upload	Permits Planning Attachments	Displays a <i>New</i> badge 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 badge, which is available on the Permits tab only. The badge 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. It isn't available on phones or in the list view on the Permits tab.
File Name	Permits, Inspection, All Planning Attachments, Reports	View the filename with file type extension. Click the link to open the attachment preview.
File Size	Permits, Inspection, All Planning Attachments, Reports	View the file size. For example, 12.95 KB.
Description	Permits, Inspection, All Planning Attachments, Reports	View the description of the attachment as entered by the person who added the attachment.
Report Name and Report Type	Reports	View the report name and report type of the attachment. These columns appear only on the Reports tab of the Attachments page for planning applications.
Uploaded By	Permits, Inspection, All Planning Attachments, Reports	View the name of the person who uploaded the file. Registered public users see <i>Staff</i> instead of a name.
Uploaded On	Permits, Inspection, All Planning Attachments, Reports	View the date and time when the person uploaded the file.
Category and Subcategory	Permits, All Planning Attachments	View the document category for the attachment. The category and subcategory are available when a document group is specified during setup for the transaction type or in the

Page Element	Attachments Tab	Description
		<p>contractor license options. The category and subcategory appear automatically when you upload an attachment from the Required documents section.</p> <p>This field isn't available for code enforcement case attachments.</p>
Protected	Permits Planning Attachments	<p>Displays an icon 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>Protected document icons can look like this:</p> <p> - Edit Protected Document</p> <p> - Archive Protected Document</p> <p> - Archive Protected or Protected Editable Document</p> <p>CAUTION: The system will always prevent you from uploading to an application password-protected documents that require a password to open.</p>
Source	All	<p>View the source of the attached file on the All tab.</p> <p>Valid values can include:</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>.</p> <p>For example, attachments added through the Inspector Application display <i>Inspection</i> in this field.</p> <p>Attachments added to web form questionnaire responses display <i>Permits</i> in this field.</p>

Page Element	Attachments Tab	Description
		This column appears only on the All tab of the Attachments page for permit and business license applications.
Source	Inspection	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 Inspector Application. This column appears only on the Inspection tab of the Attachments page for permit applications.
Reference	Inspection	View inspection attachment information: <ul style="list-style-type: none"> The checklist description for checklist attachments. The checklist item description for checklist item attachments. For inspection-level attachments, the field is blank.
Required	Permits Planning Attachments	Indicates whether the attachment satisfies the criteria for a required document. For more information, see Working with Required Documents .
Final	Permits Planning Attachments	Displays Yes when agency staff turn on the Final switch on the Attachment details drawer for application attachments.

Adding Permit and Planning Attachments

You upload files to the Attachments page in the application details using the **New attachment** drawer.

The permit attachments on the Inspection tab are uploaded by building inspectors in the Inspector Application. The reports planning application attachments on the Reports tab are generated from the Conditions of Approval and Decision and Hearings pages.

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 Inspector Application is 25 MB.

Here's how to add application attachments

1. Click the **Add** icon button.
2. Select the file to upload in the browser dialog box and click **Open**.

The file name appears on the **New attachments** drawer.

3. On the drawer, optionally enter a description of the file.

4. If the **Category** and **Subcategory** fields appear on the drawer, optionally select a document category and subcategory.
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 an application is based on the document group that was defined for the application type at the time the application is saved.
5. Click the **Upload** button.

Working with Application Conditions

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

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

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

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

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

Security Details for Applying Conditions to Applications

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

Permit Applications

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

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

Planning and Zoning

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

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

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

Viewing Conditions

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

1. Click the **Permits** or **Planning Applications** tile on the agency springboard.
2. On the applications list page, click the row for the application you are working with.
3. In the left navigation panel of the application details, expand the **Application** section.
4. Select the **Conditions** menu item, which is listed on the left-hand pane in the navigation panel.
5. On the Conditions page, you can use the condition filters to display the applied conditions like this:
 - **Active** - Displays only active conditions in the list.
 - **Resolved** - Displays only conditions that are already resolved in the list. You can't update resolved conditions.
 - **All** - Displays all conditions in the list.

You can also click the **Export** button to export the conditions list to a file.

6. View the list of conditions, which can include this information:

Page Element	Description
Condition Name	The name of the condition selected by the agency staff at the time of applying the condition.
Severity	The level of severity defined for the selected condition.
Display Message	The message entered at the time of applying the condition.
Status	The status of the condition such as Applied or Resolved.
Applied Date	The date when the condition was applied.
Source	The source of the applied condition. For example, the condition was applied on the parcel, address, person, contractor license, or business license.
Source Reference	<p>Click the link to open the Conditions page for the source application that applied the condition. This link is available only for agency staff access.</p> <p>For example, if an address condition is applied to the address listed in the submitted transaction, the Source column displays Address, and the Source Reference column displays the address, such as 1722 2nd St as a link taking you to the Conditions page for that address.</p> <p>When an agency staff applies a condition to a parcel, address, person, or contractor license by enabling the Apply Condition to Transactions option, then the condition is automatically applied to all transactions belonging to the source application. If the condition was applied to a business license with the Apply Condition to Transactions option turned on, then the</p>

Page Element	Description
	condition is automatically applied to all business license applications related to the license. For details, see Setting Up Conditions .
Priority	The priority selected - High, Medium, or Low.
Resolved Date	The date when the condition was resolved.
Resolve	The button used for resolving a condition. The Resolved button for resolved buttons is inactive.

Automatically Applying Conditions Using Business Rules Framework

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

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

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

Agencies can also configure the system to automatically apply conditions to business licenses and associated transactions using the Business Rules Framework. For information about setting up business license conditions to be automatically applied to origination, renewal, or amendment applications when a credential associated with a business license expires, see [Setting Up Credential Conditions](#).

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

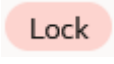

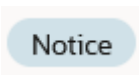
Applying a Condition to a Transaction

You can manually apply conditions to transactions on the **Apply new condition** drawer.

1. Click the **Apply Condition** button.
2. Select a condition on the **Apply new condition** drawer:

For more information about defining conditions and their rules, see [Setting Up Conditions](#).

Page Element	Description
Condition Name	Click the drop-down list to select the condition that you want to apply. The list displays the available conditions along with their severity, display message, and description.

Page Element	Description
	After you select a condition, the condition information appears on the drawer as it was defined in the condition definition. You can override the default rules, priority, description, and additional information to customize the condition for this application.
Display Message	Displays the message associated with the selected condition. This message is entered by your agency administrator in the condition definition and can't be updated here.
Severity   	Displays a badge with the level of severity defined for the selected condition. <ul style="list-style-type: none"> ○ <i>Lock</i>: This severity suspends all operations and selects all rules for the condition. ○ <i>Hold</i>: This severity enables agency staff to select the rules that apply to the condition. ○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.
Condition Rules	Select one or more from the available condition rules: <ul style="list-style-type: none"> ○ Prevent Workflow Advancement ○ Prevent Issue or Final ○ Prevent Payment ○ Prevent Inspection Schedule ○ Prevent Inspection Result ○ Prevent Final Inspection Condition rules available for selection are based on the severity of the condition that you have selected. For example, for a condition with a Hold severity, you must select at least one condition rule, and for a condition with Lock severity, all condition rules are automatically applied.
Priority	Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .
Description	Displays the description as entered by your agency administrator in the condition definition, but you can update the text here.
Additional Information	Displays additional information as entered by your agency administrator in the condition definition, but you can enter new information here.

- Click the **Apply** button to save the condition and return to the Conditions page.

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

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

Resolving a Condition

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

1. Click the **Resolve** button for the condition you want to resolve.
2. On the **Resolve condition** drawer, enter a description of how the condition was resolved in the **Resolution Action** field.
3. Click **Resolve**.

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

Modifying a Condition

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

1. Click the row for the condition you want to modify.
2. On the **Condition details** drawer, you can update the rules, priority, description, and additional information for a condition with Hold severity. For conditions with a Lock or Notice severity, you can update the priority, description, and additional information.

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

3. Click **Save**.

Viewing a Resolved Condition

You can view the details of a resolved condition on the **Condition details** drawer.

1. Select the row for a condition with a status of **Resolved**.
2. The **Conditions details** drawer opens to display the details of the condition, including additional information about its resolution:
 - Resolution Action
 - Resolved Date
 - Resolved by <Agency Staff Name>

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

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

Working with Related Transactions

This topic provides an overview and describes how to work with related transactions using the Redwood interface.

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

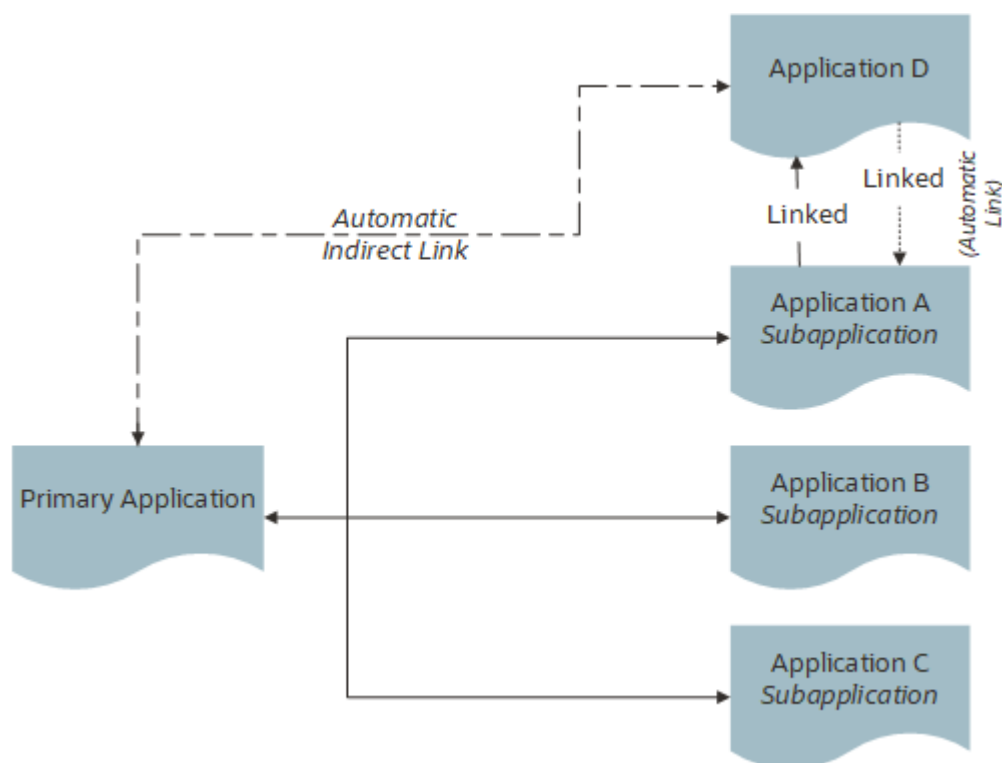
Agency staff can establish links between transactions and code enforcement cases as well. Only agency staff such as a code technician have access to the Case – Related Transactions page and are allowed to drill down to the case detail from other transactions. Public users don't have access to related transactions for cases.

When you link one transaction with another manually, 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.

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

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:



When working with related transactions, keep these considerations in mind:

- Only a permit can be assigned as a primary application.
- Existing applications that are in terminal statuses such as Completed, Canceled, Withdrawn, or Denied aren't available for selection.
- A primary application can be linked to multiple subapplications but a subapplication can be linked to only *one* primary application. Both types of applications can be linked to other applications using the link type—Linked. Once a permit is marked as a subapplication, the system disables the option to link the application as Primary.

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*.

Working with the Related Transactions Page


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 access the Related Transactions page, expand the **Application** section in the left-panel navigation menu in the transaction details, and select the **Related Transactions** menu item.

Viewing Related Transactions

Access the Related Transactions page.

Page Element	Description
Search	Use the search control to filter the list of related transactions with a keyword search. For example, if you want to confirm a planning application has been linked, enter <i>planning</i> .
Show	Select the filter option to list the applications linked by the types: <ul style="list-style-type: none">• All• Primary - For permits only.• Subapplication - For permits only.• Linked This option displays the count of applications for each type in parentheses.
Link Applications and Link Cases	Click the Link Applications button to link a business license, permit, or planning application to the current application. Click the Link Cases button to establish links between transactions and code enforcement cases.
Include Indirects	Click to toggle the view to display the indirectly linked applications for each application record. Including the indirectly linked view is turned off by default. Note: The Include Indirects button is visible only when the application has an indirect relationship with another application, otherwise it's hidden.
Exclude Indirects	Click to toggle the view to not display the indirectly linked applications for each application record. This button appears only after previously clicking Include Indirects .
View drop-down menu	Click the View Relations option, from the drop-down menu, to view a diagram representing the relationship between the transactions.
Transaction ID	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 can't drill down to the detail page.</p>
Transaction Type	The transaction types are created in the Intake Form Designer by the agency, so they will reflect the transaction type name set for the intake form for that application. For example, a transaction type for a permit may be <i>Residential Solar</i> , and a transaction type for code enforcement may be <i>Unsafe Structure</i> .
Classification	Shows the classification of the transaction, such as Permit, Case, Planning application, and so on.
Link Type	The type of link in the context of the transaction opened on the transaction details page. For example, values may be <i>Subapplication</i> , <i>Linked</i> , <i>Indirect</i> , and so on.
Transaction Status	The current status of the transaction or case, such as <i>Pending</i> , <i>Submitted</i> , <i>Violation</i> , and so on.
Description	The description as entered for the application by the applicant on the intake form, such as <i>Kitchen Remodel</i> or <i>Carl's Auto Business License</i> .
Transaction Updated Date	The date on which the transaction was last updated.
Linked By, Linked On	The name of the person who linked the transaction, and the date on which it was linked.
Conditions of Approval	When a transaction has conditions of approval applied to it, this column displays a View link. Click the link to view details.
 Actions	<p>Depending on the type of related transaction, you can select from these options:</p> <ul style="list-style-type: none"> Mark a transaction as a subapplication or linked. Remove the link between applications. Apply conditions of approval to permits. <p>See a separate section on performing actions.</p>

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 the Setting Up Related Transaction Linking topic in *Setting Up Agencies*.

To link a business license, permit, case, or planning application to a transaction:

1. Click the **Related Transactions** link in the left panel navigation of business license, permit, case, or planning application details.
2. On the Related Transactions page, click the **Link Applications** button to open the **Link applications** drawer, 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. Select the **Open** or **All** filter button to view the open applications or cases in the system or all of them.

Note: If no property is associated with the application or case, then all applications that are open for linking are listed by default.

3. Select the desired applications or cases to link using the checkboxes and then click one of the available buttons to link to your source application:
 - **Add as Linked**
 - **Add as Primary** - For permits only.
 - **Add as Subapplication** - For permits only.

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 transactions. The linked transactions appear in the table on the Related Transactions page.

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 available options:

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

Working with Fees and Payments

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

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

Fees are calculated based on agency fee setup. For more information about setting up automatic fee calculations based on permit or planning application type, see [Creating Decision Models for Fees](#).

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

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

Viewing Fees and Payments for an Application

1. Select the **Permits** or **Planning Applications** tile on the agency springboard.
2. Click the row for the selected application on the applications list page.
3. Click **Fees and Payments** in the left panel or click the **View Details** button in the **Fees and Payments** section on the Overview page for the application.
4. On the Fees and Payments page, view a list of fees, including the following information:

Page Element	Description
Fee Description	The description of the fee as defined when creating a fee item.

Page Element	Description
Amount	The amount due for each fee.
Currency	The currency in which the transaction is paid.
Status	<ul style="list-style-type: none"> ○ <i>Canceled</i>: Indicates the fee payment is no longer required. ○ <i>Pending</i>: Indicates the fee is pending the agency's finalization. The fee may or may not become due. ○ <i>Hold</i>: Indicates the fee requirement has been put on hold until an issue or condition associated with the application or a permit inspection has been resolved. ○ <i>Due</i>: Indicates the current fee request is due and needs to be paid. ○ <i>Refund Pending</i>: Indicates that a refund was submitted for processing and approval. ○ <i>Refunded</i>: Indicates the fee was reversed and a refund was issued. ○ <i>Void</i>: Indicates the refund for the fee was voided. ○ <i>Waived</i>: Indicates the applicant no longer has to pay the fee because it's been waived. ○ <i>Payment in Process</i>: Indicates that the fee payment was initiated but not yet resolved. Typically this status is temporary and resolved to <i>Paid</i> once the payment is recorded in the application. When the status changes to <i>Paid</i>, click the <i>Paid</i> link to download and view the payment receipt in the format set up by your agency.
Department	The department within the agency requiring the payment.
Assessed Date	The date the request for payment was issued.
Due Date	The date on which the payment is due.
Memo	Add any additional description to help identify the nature of the newly added fee, which can help answer questions regarding why a fee was added during the application process.
Payment Date (and payer name)	<p>The date payment was received.</p> <p>This field also displays the payer name, which depends on the payment method:</p> <ul style="list-style-type: none"> ○ Cash: The name provided by the customer to the cashier. ○ Check: The name recorded during payment processing, usually the name on the check. ○ Credit or debit card: The name returned by the payment processor. ○ Offline: The name recorded during payment processing. ○ Trust account: No name is displayed.
Payment Method	Indicates the method using which the payment was made, for example, <i>online</i> or <i>offline</i> .

Page Element	Description
Payment Reference	The payment reference issued for the transaction. Click the payment reference number to view the payment receipt.
Paid By	Indicates the name of the person who completed the fee payment. It can be an agency staff, applicant or contact with application access.
Invoice	The payment invoice number of the paid fee associated with the application. Click the invoice number link to view the payment invoice.
Total Fees	The total amount of fees that may be applicable to the application.
Total Payable	<p>The amount of fees that are designated as payable.</p> <p>The agency may generate fees that are not due upon application submission and are therefore not payable. For example, plan review or inspection fees may be applied based on whether a plan review or inspection is required or not. Or the agency may place a due fee on hold.</p>
Total Paid	The amount of the total fees already collected.
Balance Due	The remaining portion of the fees yet to be collected.
Pay	<p>Click to open the Pay Fees page, where you can select the items that you want to pay in this transaction. You can make a full or partial payment.</p> <p>If you want to make a partial payment, deselect the <i>Select All</i> checkbox to clear the checkboxes for all the fee items and then select individual items. If the application status is <i>Payment Pending</i>, full payment is required. That is, fees that are due when you submit an application must be paid in full.</p> <p>Note: The Pay button takes applicants and contacts with application access directly to the Checkout page in payment services.</p>
View Deposit Accounts	Click to open the Deposit Accounts page and view a list of all deposit accounts associated with the project.

Adding Ad Hoc Fees


Using the Fees and Payments page, you can manually add fees to an application if the situation arises, such as a late fee, an unforeseen processing fee, an addition to the project request, and so on. These fees are assessed outside of the automatic fees process. That is, you calculate the amount due and manually enter the fee you want to add.

When the fee status changes to *Due*, the system sends a notification to the applicant that new fees have been assessed and are due.

Here's how to manually add a fee:

1.



Click  on the Fees and Payments page. This button is only available to agency staff who have appropriate permissions.

2. On the Add fee drawer, select an ad hoc fee from the **Fee item** drop-down list.

3. Enter the fee required for the item in the **Amount** field.

4. Set the status of the fee in the **Status** drop-down list. Select from these values:

- *Pending*
- *Hold*
- *Due*
- *Canceled*
- *Waived*

When a fee with a *Due* status is added or a the fee status is changed to *Due*, the system sends notifications or alerts, as configured by your agency.

5. Use the **Department** lookup list to select the department to collect the fee.

The department defaults from the fee item, if specified. Otherwise, the system uses the department from the application type setup.

6. Set the assessed and due dates for the fee using the **Assessed Date** and **Due Date** fields.

7. Use the **Memo** field to add any additional description to help identify the nature of the newly added fee, which can help answer questions regarding why a fee was added during the application process.

8. Click **Save**.

Calculating Additional Fees

Use the **Calculate Fees** button or the **Calculate Fees** link when you want to calculate additional fees for an application after submission. The fee calculation is done based on a fee schedule. After the fees are calculated, you can select the fee items you want to add to the application.

Note: The **Add** button is not available when the application status is *Payment pending* or *Pending Submittal*. When the fee status changes to *Due*, the system sends a notification to the applicant that new fees have been assessed and are due.

To calculate additional fees:

1. Click **Calculate Fees** on the Fees and Payments page. This button is only available to agency staff who have appropriate permissions.

2. On the **Calculate fees** drawer, select a fee schedule. If a fee schedule is already associated with the transaction type, the fee schedule name appears as the default value, but you can select a different fee schedule as well.
3. Based on the fee structure you choose, you'll see fields that are relevant to the fees. Enter the requested values.
4. Click **Calculate Fees**.

Note: This button may be disabled if the OCI Process Automation is temporarily inactive. Once it is active, you can start the Calculate Fees process.

5. On the **Add fees** page, you'll see the calculated amounts and department for each fee item. If you want to add the calculated fee to the fees due for the application, select the fee and click **Add Selected**.

The fee item appears in the fees list with a *Due* status.

Adjusting Fees

Agency staff with appropriate permissions can correct or adjust fees as needed after the application is submitted. For example, if the applicant added 6 solar panels instead of 2, the required permit fees might increase. After you update the information that was submitted during intake in the application details, you can recalculate the total fees due based on the fee schedule for the application type. The recalculation corrects the fees by either generating a new fee or changing the amount.

Here's how you can adjust the fees for an application:

1. On the Application Details page for the application, click **Edit**.
2. Make changes as needed and click **Done**.
3. On the Fees and Payments page, click **Recalculate**.

The difference in fees compared to the original fee or the new fee appears as a separate line in the fee list. The fee totals for the application are also updated. If no adjustments are required, the displayed fees remain the same. If a fee item with a negative amount results from recalculating fees, you can process a refund to correct the overpayment.

Note: Fees are also recalculated when agency staff or applicants click the **Pay** button on the Transactions page or Applications page, respectively, or on the Fees and Payments page. Applicants will also see the adjusted fees on their Make a Payment page. Contacts with application access can initiate payments and see adjustments only by using the **Pay** button for the application record on the Applications page or on the application's Fee and Payments page.

Paying Fees

To add a payment for fees that are due, click the **Pay Fees** button. As agency staff, you have the choice of paying some or all of the fees. After you select the fees that you want to pay, you can select the payment method on the Checkout page. The **Pay Fees** button takes applicants and contacts with application access directly to the Checkout page.

Note: Registered public applicants and contacts with application access are not allowed to make partial payments. These users must ask the agency to make a partial payment on their behalf. If the application status is *Payment Pending*, full payment is required. That is, fees that are due when you submit an application must be paid in full.

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

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

For more information about paying fees, see the [Payment Flow Overview](#).

Incomplete Payments

When a fee payment is initiated, Oracle Permitting and Licensing gives it a status of *Payment in Process* which indicates that it needs to be resolved and no other payment requests can be made for the fee. If there is a network issue, the system tries to resolve the payment while the user is waiting for the payment to be processed. If the user navigates away from the checkout page or closes the browser before the payment is recorded in Oracle Permitting and Licensing, the fee status remains *Payment in Process*. When a user accesses the fee payment again through the Make a Payment page or Fees and Payments page, the application automatically tries to resolve the status to *Paid* or reset it to *Due*.

Note: You can reconcile card payments using the Sync Card Payment Status process. See [Reconciling Orphaned Card Payments](#).

Refunding Fees

Agency cashiers and application administrators can process full or partial refunds of permit fee items online.

Here's how to refund permit fees:

1. Click the **Select Multiple** icon to display the row selector.
2. Select one or more fee items.

You can only select fees that have been paid or fees with system-generated negative amounts that are due.

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

3. Click **Initiate Refund**.
4. Review the fee amount and refund method. When processing a partial refund, you're overriding the default fee amount.
5. You must enter a refund reason before you submit the refund request.

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

6. Click **Process Refund** to reverse or partially reverse the fee.

After you submit the refund request, the status changes to *Refund Pending* and the refund moves into a queue to be approved. When you submit the request, you'll see updated fee totals for the application. Once approved, the refunded amount appears as a new line in the list of payment items with a *Refunded* status.

For debit or credit, the system issues the refund using the method used for payment, while distribution for other payment methods is by manual check or other external system.

You can process multiple partial refunds to credit or debit cards. Note the following for reconciliation purposes:

- The first refund (partial or full refund of the settlement amount) is posted as follow-on credit to the original settlement transaction in CyberSource.
- Subsequent partial refunds are posted as stand-alone credits in CyberSource.

For more information about the refund approval process, see [Viewing and Processing Refunds](#).

Viewing Deposit Accounts

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

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

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

Creating External Cash Transactions

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

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

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

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

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

Working with Billing Accounts

You either establish a new billing account or choose an existing billing account during the application intake for permit or planning applications. When you establish a new billing account during the application intake process, you may be alerted about duplicate billing accounts based on the configuration. If a duplicate billing account is identified, agency staff can resolve the duplicates during application intake or later based on billing account verification status on permit or planning applications.

You view billing account information associated with a submitted permit or planning application on the Billing Account page in the application details.

Any billing contact information you add as part of the intake is shown on the Contacts page. See *Working with Application Contacts*.

Viewing Billing Account Information for a Permit Application

You view billing account information on the Billing Account page in the permit application details:

1. Select the **Permits** or **Planning Applications** tile on the agency springboard.
2. Click the row for the selected application on the applications list page.
3. Click **Billing Account** in the left-hand navigation bar.
4. On the Billing Account page, you can view the billing account details associated to the permit that includes the following information:

Page Element	Description
Organization Name	Displays the name.
Account Information	Displays the account name, number, and established date.
Site Information	Displays the site name and address.
Billing Contact	Displays the billing contact information added during application intake. Click Add to add another contact.

Using Workflow

This topic describes how to manage the underlying workflow associated with permits and planning applications using the Redwood interface.

Workflow Overview

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 from application submission all the way to completion. The workflow 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, sending communications, and advancing the workflow to the next step in the process.

Managing workflow tasks as an agency user 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. You complete the task manually outside of the system, such as reviewing plans, or within the system such as using the inspection application to record the results of an inspection. For example, if workflow includes a task to review building plans, you need to review the plans manually and record your plan review decision in the plan review pages and then update the status of the workflow task to indicate the result, such as setting the status to *Complete*. As an inspector, when using the inspection application and you

approve the final inspection, the workflow engine picks up that event and automatically changes the inspection task in the workflow to complete.

Security Details for Using Workflow

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

Permit application

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

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

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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

There are numerous tasks involved with processing the life cycle of a submitted application. Not all tasks are managed through the automated workflow system.

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. This topic discusses how to manage the tasks defined in the underlying automated workflow.

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.

Working with the Workflow Page

In the transaction details, expand the Process section, and click the Workflow tab.

The Workflow page displays a Details tab and a Summary tab.

The Details tab is where an agency staff member selects a current task assigned to you to view the details and work the task. As the tasks become active they are added to the list. Click the link in either the **Task** or **Result** column to open the associated drawer page to view the details.

Supervisors can use the options button (ellipses button) to display the *View Process Information* and *Alter Workflow* options.

Working with the Details Tab

On the Details tab you can view the following information.

Page Element	Description
Task	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.
Status	The status of the task, such as In Progress, Completed, and so on.
Assigned To	To whom a task is assigned.
Due Date	If applicable, the date when the task must be completed.
Assigned By	Who assigned the task.
Assigned Date	The date the task was assigned.
Duration	The amount of time taken to complete the task.
Completed By	Who completed the task.
Action	Displays a list of actions to take upon the task.

Working with the Summary Tab

The Summary tab displays the list of current and completed tasks, showing the status, last updated date, and the days taken to complete the task.

Viewing Process Information

If needed, supervisors or administrators can view the underlying process information. Typically, this is done only for troubleshooting or resolving issues with a help desk.

To alter workflow:

1. Click the Options button and select *View Process Information..*
2. View the displayed information.

Page Element	Description
Instance ID	The instance ID in the runtime workflow engine within Oracle Process Automation.
Process Status	The status of the process, such as <i>Active</i> , <i>Completed</i> , and so on.
Last Updated Date	The last time there was activity within the process.

3. Click **Close**.

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.

Alter Workflow

Workflow

Current Workflow Task
Assign Planner

New Workflow Task
Assign Planner

Transaction

Update Transaction Status
Submitted

Cancel

View Workflow

Save

To alter workflow:

1. Click the Options button and select *Alter Workflow* to display the Alter Workflow drawer page.
2. In the Workflow section, Select the desired workflow step from the **New Workflow Task** drop-down list.
3. In the Transaction section, select the proper status for the workflow step from the **Update Transaction Status** drop-down list.
4. Click **Save**.

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

Note: You can't alter a workflow task back to a pending status.

Note: Click **View Workflow**, if you need to review the steps and swimlanes in the underlying workflow process diagram as defined in Oracle Process Automation. This displays an image of the entire workflow process diagram you can view. Note that View Workflow isn't supported in the Redwood interface.

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

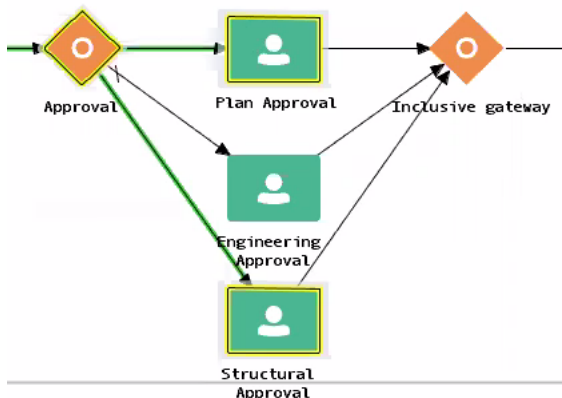
- Don't depend on each other to be completed.
- Can be completed simultaneously.

The Alter Workflow action lists 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, an administrator must navigate to the parallel or inclusive gateway start node in the underlying workflow definition.

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

This example illustrates a workflow process definition with parallel tasks.



Working with Preapplication Outcome

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

Applicants and agency staff review the summary information and comments entered by their assigned agency planner on the Preapplication Outcome page and proceed with creating and linking the required applications. Although accessed from pages displayed using the Redwood Experience, the Preapplication Outcome page is displayed in the classic interface.

Go to the preapplication you are working with, and navigate to the Preapplication Outcome page in the application detail pages. In the left navigation panel, expand the **Progress** menu section and click the **Preapplication Outcome** menu link.

Adding a Required Application

As an agency assigned planner you add application types to the Preapplication Outcome page, which lists the required application types added for the submitted planning application. Here applicants can review and take appropriate actions, such as linking an existing application or creating a new application.

1. On the Preapplication Outcome page, click the **Add** button to open the Required Application page and enter values for the following fields:

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

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

Adding a Review Comment

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

1. In the Review Comments section on the Preapplication Outcome page, click the **Add Comment** button to open the Add Comment page and enter comment text.


You can use the **Rich Text Editor** option for formatting your comment.

2. Click **Save**.

Viewing the Preapplication Outcome

To view the summary information:

1. In the Required Application section on the Preapplication Outcome page, view a list of application types that are required for your submitted planning application. Find additional information:

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

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

Working with Reports

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

Use the Reports page in the planning application details to view a list of all of the reports for the application, generate a report, manually create an ad hoc report, and view report details.

Here's how to get to the Reports page:

1. Click the **Planning Applications** tile on the agency springboard.
2. On the applications list page, click the row for the application you are working with.
3. In the left navigation panel of the application details, expand the **Progress** section.
4. Select the **Reports** menu item in the expanded section.

Security Details for Working with Reports

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

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

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

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

Viewing Reports

You can view the information and perform actions as described here:

Page Element	Description
Report Name	View the name of the report.
Report Type	View the type of report: <ul style="list-style-type: none">• <i>Ad hoc</i> - For more information about adding an ad hoc report, see the Creating an Ad Hoc Report section in this topic.

Page Element	Description
	<ul style="list-style-type: none"> • <i>System</i> - Indicates that the report was added automatically based on agency setup.
Status	<p>View the status of the report, such as these:</p> <ul style="list-style-type: none"> • <i>Pending</i>: The report object is created. • <i>In Progress</i>: Details are entered in the report and saved. • <i>Generated</i>: The report is generated and printed. • <i>Sent</i>: The report has been sent to the concerned party. • <i>Received</i>: The report was received by the concerned party.
Application Status	<p>View the status of the application:</p> <ul style="list-style-type: none"> • <i>Pending</i> • <i>Submitted</i> • <i>Accepted</i> <p>For more information about application statuses, see Viewing Application Status History.</p>
Actions	<p>Select from the available options, which are based on the status of the application.</p> <p>These options are available for reports in pending or in progress statuses:</p> <ul style="list-style-type: none"> • Generate Report • Cancel Report <p>Once the report has been generated, these actions are available:</p> <ul style="list-style-type: none"> • View Generated Report • Update Generated Report • Manage Attachments

Creating an Ad Hoc Report

To manually create an ad hoc report for an application:

1. Click the **Planning Applications** tile on the agency springboard.
2. On the applications list page, click the row for the application you are working with.
3. In the left navigation panel of the application details, expand the **Progress** section.
4. Select the **Reports** menu item in the expanded section.
5. On the Reports page, click the **Add Report** button.
6. On the new report drawer, select a report from the generated drop-down list. The report name, report ID, and category name are automatically populated. Click the **Add Report** button.

The new ad hoc report is now listed on the Reports page in a pending status.

Generating a Report

Here's how to generate a report:

1. Click the three-dot **Actions** menu button for the report, and select the **Generate Report** option.

2. On the Generate Report drawer, you can generate the report with the selected template or manually update the report before you generate it.
 - **Selected template** - Click the template button for the named report to preview the report in a new window. You can review the details, print the document, and send it to the applicant.
 - **Edit Report Manually** - Turn on the switch to update the report before generating it. Download the report template then upload the manually edited report. Although you can upload more than one updated report, you can only mark one as Final. The report marked as Final will be generated.
3. Click **Cancel** to close the window and return to the report at a later time. You can use the Continue button to access this page later.
4. Click **Generate** to generate the report.

The status of the report changes to Generated and the report is available as an attachment.

Reports generated and completed for a planning application are added to the Attachment page in the planning application details, enabling applicants to access them. Conditions of approval reports and hearing timeline reports are examples of reports which can be accessed by the applicants from the Attachments page. For more information about attachments, see [Working with Application Attachments](#).

Note: Only system-generated and uploaded reports are added to the Attachments page for the planning application.

Viewing or Updating Generated Reports

You can review the details of the reports that are in the *Generated* or *Sent* status by clicking the three-dot **Actions** menu button for the report, and selecting an available option:

- **View Generated Report** - Select to open the Report Details drawer. The overview section shows the report name, status, category, report type, creation date, and generated date.

The reports attachments section of the report details drawer displays a preview, link to open the PDF report, file size, report type, description, and actions. Example of an attachment can be a copy of the report that was sent to the applicant. You can also view details, preview, and download the report.

- **Update Generated Report** - Select to to view or update the report.

Click the **Download Editable Report** button on the report details drawer to download the generated report. After making updates, click the **Add** button to upload the file that you updated. Although you can upload more than one updated report, you can only mark one as Final. The report marked as Final will be generated.

- **Manage Attachments** - Select to add additional attachments to the generated report. Select an attachment type, such as Acknowledgement or Receipt. The attachment appears on the Reports tab on the Attachments page.

Working with Conditions of Approval

You apply a set of conditions of approval to a user-submitted planning application. Conditions of approval can be applied automatically through a template or added manually from the Conditions of Approval page. This topic describes working with conditions of approval in the Redwood interface.

Security Details for Working with Conditions of Approval

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Conditions of Approval Inquiry	View conditions of approval on planning applications.	PSC Agency Staff – All agency users
PSC Conditions of Approval Administration	Administer conditions of approval on planning applications in any status.	PSC System Administrator
PSC Conditions of Approval Contributor	Manage conditions of approval on planning applications on which the user is assigned as a plan reviewer. Users can update and delete only the conditions added by themselves.	PSC Plan Reviewer
PSC Conditions of Approval Management All	Manage conditions of approval on planning applications assigned to others and to themselves.	PSC Principal Planner
PSC Conditions of Approval Management Self	Manage conditions of approval on planning applications assigned to themselves.	PSC Associate Planner
PSC Planning Application Management with Elevated Access	Manage conditions of approval on planning applications that are: <ul style="list-style-type: none"> Assigned to a planner Not yet assigned 	PSC Planning and Zoning Application Administrator PSC System Administrator PSC Zoning Administrator

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

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

Accessing the Conditions of Approval Page

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

To access the Conditions of Approval page:

1. Click Planning Applications from the Agency Springboard.
2. On the Planning Applications page select the application you want to open.
3. On the Planning Application details page, expand the Progress section in the left navigation.
4. Select Conditions of Approval.

Viewing and Updating Conditions of Approval

The Conditions of Approval page lists all conditions including those that are automatically applied as well as those applied by agency staff.

Only assigned planners can manage the conditions of approval for their applications. However, staff with the *PSC Planning Application Management with Elevated Access* role assignment are allowed to manage the conditions of approval for unassigned applications as well as applications assigned to themselves or to any other planner. Such staff members can perform the following actions related to the conditions of approval:

- Add new
- Update, resolve, and delete existing
- Reorder
- Add comments and attachments

Note: The delivered *PSC Planning Application Management with Elevated Access* duty role can't be directly assigned to users. Administrators must create a new job role or use an existing job role to associate this duty role to that job role, and then assign it to a user. For more information on working with roles, see *Managing Roles in Oracle Permitting and Licensing*. Use the Compliance period filter, to reduce the number of conditions in the list. Here you can filter by the stage of the application, such as Plan Review, Permit Issuance, and so on. To view a condition, click the row for that condition, or click the Options button and select View Details.

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

You can group conditions using the **Category** and **Subcategory** drop-down lists.

Use the Compliance Period list to indicate at what stage(s) in the lifecycle the condition applies:

- Permit Application
- Plan Review
- Permit Issuance
- Inspection
- Certificate of Occupancy
- Use of Operation

For the **Description** add all the details that a planner or applicant would need to know to make sure or compliance.

Click **Update** to save any changes, or click **Cancel** to return to the list.

Click **Delete** to remove the condition.

Creating New Conditions

Click the **Create New** button and on the New condition of approval drawer page, update these values, and click **Create**.

Page Element	Description
Condition Type	Displays <i>Custom</i> as this condition is added manually by an agency staff.

Page Element	Description
Category	Select a category of the condition.
Subcategory	Select a subcategory of the condition.
Compliance Period	Select one or more compliance period values using the checkboxes.
Description	Enter a description for the new condition of approval.

Selecting Existing Conditions

Click the **Select Existing** button and on the Add condition of approval drawer page, select the desired condition, and click **Create**.

Reordering Conditions

Click the **Reorder** button, and on the Reorder conditions of approval page, use these buttons to configure the desired order of conditions.

Page Element	Description
Up	Click to move up the selected record by one step.
Down	Click to move down the selected record by one step.
Top	Click to move the selected record to the top of the list.
Bottom	Click to move the selected record to the bottom of the list.

When you are satisfied with the order, click **Reorder** to save your changes.

Generating the Conditions of Approval Report

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

To generate the report, click the More Actions button, and select Generate Report. The conditions of approval report opens in a new window. You can print or save the report.

Accessing Plan Reviews

To access Plan Reviews quickly, click the More Actions button and select Plan Reviews.

For more information on plan reviews, see [Plan Review Overview](#).

Exporting the Conditions of Approval List

To export a CSV format list of the conditions of approval, click the **Export** button, select a location to save the file, and click **Save**.

Resolving Conditions of Approval

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

1. Locate the condition in the conditions of approval list.
2. Click the More Actions button for that row.
3. Select Resolve.
4. On the confirmation dialog box, click **Resolve**.

Deleting Conditions of Approval

Locate the condition you want to remove from the application, click the More Actions button for that row, and click **Delete**.

Working with Public Hearings

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

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

Note: Before you begin, ensure that hearings are applicable to the application you have selected. Go to the planning application type definition, and in the **Hearing** field, select *Applicable* on the Planning Application Type Details page. For more information, see [Setting Up Planning Application Types](#).

Security Details for Working with Public Hearings

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

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

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

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

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

Viewing Public Hearing for a Planning Application

Here's how to view a public hearing:

1. Select the **Planning Applications** tile on the agency springboard.
2. On the Planning Applications page, select the application for which you want to add a hearing.
3. Under the expanded **Progress** menu section in the left navigation panel in the application details, click the **Decision and Hearing** menu link.

4. The Decision and Hearing page lists all scheduled hearings, including hearing cards with the following information:

Page Element	Description
Decision-making body	View the hearing or decision making body that will evaluate the application. For example, City Council.
Hearing Date	View the date on which the hearing is scheduled for a decision to be made. If there is no date displayed, the hearing is in the Not Scheduled status. You can schedule or reschedule a hearing for your application using the Schedule or Reschedule option in the three-dot Actions menu.
Schedule Status	View the status of the schedule: <ul style="list-style-type: none"> ○ Not scheduled ○ Tentative ○ Final ○ Canceled
Decision Status	View the status of the decision: <ul style="list-style-type: none"> ○ Not started ○ Completed
Staff Recommendation	View the recommendation made by the staff.
Decision	View the decision made by the decision-making body.
Actions	The options under this menu is determined by several factors such as the user logged in, the schedule status, the decision status, and the decision. For details about the Actions menu, see the Finalizing the Hearing section in this topic.

5. Let's take a look at the available actions on the hearing cards. Depending on the Schedule Status, you can perform these actions:
- If the Schedule Status is Tentative, you can click the **Finalize** button to change the schedule status to Final. The other available actions include these: View Details, Generate Notifications List, Reschedule, and Cancel.
 - If the Schedule Status is Final, you can click the **Update Decision** button to update the decision on the update decision drawer until a decision is entered. The other available actions include these: View Details, Update Staff Recommendation, Generate Notifications List, Reschedule, and Cancel.
 - If the Schedule Status is Canceled, you can click the **View Details** button. The information is read-only.

Scheduling a Public Hearing

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

Note: Before you begin, ensure that hearings are applicable to the application you have selected. Go to the planning application type definition, and in the **Hearing** field, select *Applicable* on the Planning Application Type Details page. For more information, see [Setting Up Planning Application Types](#).

You can access the Hearing Scheduler page directly by selecting the **Hearing Scheduler** tile on the agency springboard, or through the planning application details on the Decision and Hearing page. Click the **Schedule New Hearing** button on the Decision and Hearing page to open the Hearing Scheduler page in the classic user interface. The applicable decision making bodies and their schedule dates are available for scheduling the hearing.

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

Using the Hearing Scheduler Page



The Hearing Scheduler page allows you to perform various scheduling operations in a calendar format in the classic interface:

- Schedule a hearing for your assigned application. Drag the selected application item from the left panel onto one of the desired available dates in the calendar space. You can also click the **Schedule** button on the application item and enter the schedule details.

Agency staff can repeatedly schedule hearings of the same type for a planning application. When an agency staff schedules a hearing for an application which already has an active hearing, the system allows to either schedule a new one and cancel the active hearing or keep the active hearing. So, even though the agency staff can schedule multiple hearings, only one hearing will be active at any given point in time.

- Reschedule a hearing for your assigned application. Either drag and drop the application item to a new available date or use the **Reschedule** action on the scheduled application item.
- Reorder the sequence of a hearing for your assigned application. Either drag and drop the application item to a new position or use the **Reorder** action on the scheduled application item.
- Insert a new date in the calendar that is not available on the scheduler. Use the new date to schedule or reschedule hearings.
- Finalize a hearing. The schedule status of each hearing appears as tentative until you finalize the hearing by using the Finalize action.
- Generate and print the decision making body's agenda for the selected date.

Page Element	Description
Decision Making Body	Lists all the applicable decision making bodies available in the hearing hierarchy. For a selected decision making body, the left panel lists all the applications that are ready for scheduling hearings. The calendar workspace lists the dates as per the recurrence pattern set up and their corresponding hearing schedules.

Page Element	Description
	<p>Click to open the calendar and select a date that is not listed on the scheduler. Click Insert Custom Date in the calendar to add the new date record in the scheduler.</p> <p>You can schedule a new hearing on this date or drag and drop application items from another date into the date space.</p> <p>Use the cancel button available on the custom date to remove from the scheduler. You can delete a custom date only if there is no hearing scheduled on that date.</p> <p>Note: This button is available to agency staff with appropriate permissions.</p>
Select Date	Click to open the calendar and select a date. The calendar displays only the available schedule dates for the selected decision making body.
	Allows you to view the previous and the next set of available schedule dates for the selected decision making body.
Print Agenda	<p>Click the button to print the decision making body's agenda for the selected date.</p> <p>Note: Oracle Permitting and Licensing supports multiple templates for printing hearing agendas. For details, see Setting Up Hearing and Decision Making Bodies and Setting Up Reports.</p>

Finalizing the Hearing

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

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

Let's take a look at the actions available on the Decision and Hearing page.

Page Element	Description
Update Decision	<p>Click to select the hearing decision, based on the decision made by the decision making body. The values in this field are configured by your system administrator on the Hearing setup page.</p> <p>Note: Agency staff can update a decision only on or after the hearing date. However, agency administrators can make updates to a decision at any time.</p>

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

Updating a Hearing Decision

Agency staff can make updates to a decision only on or after the hearing date.

Once a planning hearing date is scheduled, the agency staff cannot update a decision. This is to prevent agency staff from prematurely or mistakenly updating the planning hearing decision. Agency administrators can still make updates to the hearing decision at any time.

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

6. View the details of the hearing on the Update Decision page. Select a decision from the Decision drop-down list, such as *Approved*, *Continue*, *Denied* or *None* and enter comments.

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

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

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

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

Updating the Staff Recommendation

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

1. Click the **Decision and Hearing** link under **Planning Application** to view the Decision and Hearing page.

2. On the decision and hearing row for which you want to update the staff recommendation, click the **Actions** icon and select **Update Staff Recommendation**.
3. View the details of the hearing on the Update Staff Recommendation page.

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

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

Viewing the Details

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

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

Page Element	Description
Staff Recommendation	View the staff recommendation added.
Staff Recommendation Comments	View any comments for the staff recommendation.

Working with Appeals

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

Security Details for Working with Appeals

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

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

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

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

Requesting an Appeal

Use the Hearings page to request an appeal:

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

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

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

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

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

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

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

Note: If the agency has enabled the use of third-party payment options, then a **Payment Choice** modal is displayed, on clicking the **Submit** button. The available options include *Cash*, *Credit card*, *Debit card*, *Offline* and *All other payment methods*. Select to pay with either of the available payment options. For more information, see [Setting Up Agency Payment Options](#) and [Setting Up Third-Party Payments](#).

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

Viewing an Appeal Request

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

- Select the **Planning Applications** tile on the Agency Springboard.
- On the Planning Applications tab of the Transactions page, select the application you are working with.
- On the Planning Application page, click **Planning Application** in the left panel.
- Click the **Hearings** link under **Planning Application** to view the Hearings page.
- On the hearing row for which you want to view the appeal request, click the **Actions** icon and select **View Appeal Request**.
- View the details of the appeal request on the Request Appeal page.

Viewing Appeal Fee Details

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

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

Generating a Hearing Notifications List

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

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

To generate a hearing notification list:

1. Select the **Planning Applications** tile on the Agency Springboard.
2. From the list of planning applications on the Transactions page, click a planning application to access the Planning Application page.
3. Click **Planning Application** in the left panel of the Planning Application page.
4. Click the **Decision and Hearing** link under **Planning Application** to view the list of hearings.
5. Select the **Actions** button for the row and select **Generate Notifications List** from the menu that appears.
The Generate Notifications List window appears and displays the Public Notification page. This page shows a map on which the parcel or parcels from the planning application are selected. Selected parcels appear as solid blue shapes.
The selected parcels are the center of the notification area. The notification area consists of all parcels that are at least partially within a specified distance of the selected parcel or parcels.
6. If the default parcel selection is not correct, modify the selection as described in [Creating Map-Based Public Notification Lists](#).
The selection tools are the same ones that you use on the Main Map. For detailed information on using the selection tools, see [Using the Main Map and Explore Your City Map](#).
7. Click **Apply** to update the notification area with your selection.
8. If you are satisfied with the notification area, click the **Download** button that becomes visible after you apply a selection.
Three files are downloaded: *Address.csv*, *Owner.csv*, and *Parcel.csv*. If the map is enabled to show neighborhood groups that are fully or partially within the notification area, a fourth file is downloaded: *Neighborhood Group Mapping.csv*.

Files are saved to default folder defined in your browser settings. Your browser must be able to download multiple files.

9. Save the .csv files so your agency can use them to generate notifications.
The notification process is not part of the Oracle system.

Viewing Application Status History

You can view the history of application status changes on the Status History page in the application details.

Whenever the status changes for a transaction, the change is recorded in the history and the current status is viewable in a badge at the top of the page next to the application ID and application type.

Reviewing the Status History

From the left-panel navigation in the application details, click to expand the **Progress** menu section. Click the **Status History** menu item. The status history is display-only.

On the Status History page, you can view this information:

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

Viewing Recorded Time for an Application

Agency staff can view the time spent working on a permit or planning application on the Time Recording page in the application details. Depending on your permissions, you can add or update the time entries.

Agency staff add time entries during plan review cycles, mobile inspections using the Inspector Application, and in the inspection details. The time entries associated with the permit then appear in the permit application details, where they can be updated, if needed. Agency staff with permissions can also add time entries for planning applications. For more information, see [Adding Time Entries](#).

This example illustrates a time entry that was recorded for a permit inspection.

ORACLE

Go to Applications

SUB

Commercial Sign • SIGN-2024-00015

Inspection

1 APPLEGATE WY, ALAMEDA, CA 94502

Subapplication

Actions

Pay Fees

Overview

Application

Application Details

Property Information

Linked Permits

Attachments

Conditions

Related Transactions

Fees and Payments

Fees and Payments

Due 0.00 USD

Progress

Workflow

Time Recording

Q

Search

1 item

Recorded Time

Unassessed

Assessed

Download

Name	Source	Category	Subcategory	Date	Hours	Minutes
Adam Gill	Inspection INSP-2024-00036	Time allocated for inspection activities	Time allocated to perform inspections	10/30/24	9	0

For more information about time recording using the Inspector Application for mobile devices, see *Reporting Inspection Time*. See also *Reviewing Inspection Details* and *Managing Plan Review Cycles*.

Here's how to update recorded time associated with an application:

1. Access the detail pages for the permit or planning application you are working with.
2. Click the **Time Recording** menu item in the left navigation panel to view the Time Recording page.
3. Use the search or filters for finding or viewing the time entries.

Page Element	Description
Search	Enter identifying text in the lookup field. Remove the search text or click the Clear All Filters button if no matching time records were found.
Recorded Time	Click to display all associated time records.
Unassessed	Click to view time records with unassessed fees.
Assessed	Click to view time records with fees that have been assessed.

You can also click the **Export** button to download the list of time entries.

4. Review the information for each time record in the table.

Page Element	Description
Name	Displays the name of the agency staff who entered the time. Click the name link to open the Time details drawer.
Source	View the source of the time entry. For example, the inspection number.
Category and Subcategory	View the category and subcategory of the time entry, based on the selected time type code.
Date	View the date associated with the activity for which time was recorded.
Hours and Minutes	View the hours and minutes associated with the activity.
Billable	Indicates whether the time was marked as billable back to the applicant.
Total Fees	Displays the unassessed fees, if any, for time entries listed when using the Unassessed filter.

- Click the **Name** link to make updates to the time entry on the **Time details** drawer. Depending on agency staff permissions, you can update these fields:

Page Element	Description
Name	Select a different name from the available options.
Date	Enter a different date.
Time Type Code	Select a different time type code from the available options. The category and subcategory appear depending on the selected code.
Hours and Minutes	Update the hours and minutes associated with the activity.
Comments	Update the comments for this time entry.
Override Bill Rate	Enter a rate that overrides the bill rate listed for the selected agency staff.
Billable	Turn on or off the switch to indicate that the time recorded is billable to the applicant.
Assess Now	Turn on or off the switch to indicate whether the system should consider the billable amount in fee assessment calculations.
Total Fees	Displays the total fees associated with the time entry.

Click **Save** on the drawer to save any updates to the time entry.

- Click the **Assess Fees** button for time entries in the **Unassessed** list. This button is available depending on agency setup for assessing fees.

For more information about recording time in Code Enforcement or viewing the list of time records for the agency, see [Adding Time Entries](#).

Working with Application Contacts

The Contacts page displays the applicant's contact information and lists additional people who were added as contacts during the intake process or after the permit or planning application was submitted. Agency staff can use the Contacts page to view, update, and add contacts for submitted applications.

Applicants and contacts with application access can view and add contacts to their own applications as well as update and make the contacts inactive. See the section "Security Details for Adding Contacts to Applications" for information about setting up security for agency staff, applicants, and application contacts to manage contacts.

There are two options for adding more contacts after submitting an application:

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

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

Your agency may also configure communications to contacts on permit and planning applications. The system sends an email notification to contacts on the intake form upon application submission as well as to new contacts when they are added to the application after submission. Contacts added to the contractor contacts in the license details also receive email notifications. For information about setting up contact communications, see [Delivered Communication Events](#) and [Setting Up Send Communication Actions](#).

Security Details for Adding Contacts to Applications

This section describes important security roles, requirements, or considerations specific to adding contacts to applications.

Permit Applications

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Add and update contacts in permit applications on which they have been assigned as an applicant or a contact with access while the application is open and currently being processed.	PSC Registered Public User
PSC Permit Contacts Management	Add and update contacts in permit application while the permit is open and currently being processed.	PSC Principal Planner PSC Plan Reviewer PSC Planning Coordinator PSC Permit Technician
PSC Permits Management with Elevated Access	Add, update, and delete contacts in permit applications at all times, whether it is open and being processed, closed, or complete.	PSC System Administrator PSC Permits Supervisor
PSC System Administrator	Add, update, and delete contacts in permit applications at all times, whether it is open and being processed, closed, or complete.	PSC System Administrator

Planning and Zoning

Primary Role	Access Description	Associated Job Roles and Abstract Roles
Registered Public User	Add and update contacts in planning applications on which they have been assigned as an applicant or a contact with access while the application is open and currently being processed.	Registered Public User
PSC Planning and Zoning Contacts Management	Add and update contacts in planning applications while the application is open and currently being processed.	PSC Planning Assistant PSC Associate Planner PSC Principal Planner
PSC Planning Application Management with Elevated Access	Add, update, and delete contacts in planning applications at all times, whether it is open and being processed, closed, or complete.	PSC Planning Assistant PSC Associate Planner PSC Principal Planner
PSC Planning Application Management with Elevated Access	Add, update, and delete contacts in planning applications at all times, whether it is open and being processed, closed, or complete.	PSC System Administrator PSC Zoning Administrator

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

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

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

Managing Application Contacts

You manage application contacts on the Contacts page in the permit or planning application details:

1. Click the **Permits** or **Planning Applications** tile on the agency springboard.
2. On the applications list page, click the row for the application you are working with.
3. In the left navigation panel of the application details, expand the **People** section.
4. Select **Contacts** in the expanded section.
5. Use the search or filters for finding or viewing contacts.

Page Element	Description
Search	Enter text to filter or find contacts.
Active	Click to view only active contacts in the grid.

Page Element	Description
All	Click to view all contacts for the application, including inactive contacts.

You can also click the **Export** button to download the list of contacts.

6. Review the information for each contact in the grid.

Page Element	Description
Name	The name of the contact.
Title	The business title of the contact.
Business	The business name of the contact.
Email and Phone	The email address and phone number of the contact.
Contact Type	The contact type, which is the role or position of the contact person relative to the current application. For example, a contact might be Applicant, Architect, Business Manager, and so on. For more information, see Setting Up Contact Types .
Primary Contact	<p>Indicates whether this is the primary contact.</p> <p>There must be one and only one primary contact for an application. The applicant is the primary contact by default in the application but can be changed in the application intake form or in the application details after submission.</p> <p>Note: The primary contact has the same application access as the applicant regardless of the access defined for their contact type.</p>
Role	The contact's identifying role. For example, <i>Applicant</i> and <i>Previous Applicant</i> .
Access	<p>Indicates the type of access the contact has to the application:</p> <ul style="list-style-type: none"> ○ Full ○ None <p>The access level is based on the contact type and can only be updated to allow more access.</p>

Page Element	Description
Active	Indicates whether this is an active contact or not.

- On the Contacts page, go to the **Actions** column in the list of properties.
Click the three-dot **Actions** button to view a menu of the available actions for the contact.

Page Element	Description
<i>View Details</i>	Select to open the Contact details drawer with the contact information for this person. This action is available for each contact.
<i>Make Primary Contact</i>	Select to change the primary contact to this contact. This action automatically removes the primary contact designation from the previous primary contact, because you can only have one primary contact.
<i>Make Applicant</i>	Select this contact as the responsible party for this application and assign a different level of application access to the previous applicant. For more information, see Changing the Applicant on an Application .

Adding Application Contacts

There are two ways to add application contacts on the Contacts page; these options are available depending on your permissions.

- Only system administrators and applicants can add contacts from the applicant's user profile by clicking the **Select from saved contacts** button.
- The applicant, contacts with full application access, and agency staff can manually add contacts to the application by clicking the **Add New Contact** button.

Here's how to add a contact by selecting contact from the applicant's user profile:

- Click the **Select from saved contacts** button on the Contacts page.
- On the drawer, select a name from the **Contact Name** drop-down list.
- Current contact information appears on the drawer. Enter or update details:

Page Element	Description
Contact Type	Search for and select a contact type from the drop-down list. The list includes the available contact types with a description and the access they have, which is set up by the agency administrator: <ul style="list-style-type: none"> Full None

Page Element	Description
	The access level is based on the contact type and can only be updated using the Access buttons to allow more access.
Active	Turn on the switch for active contacts and to update their contact information.
Access	Click the Full button to update the contact's access to allow full access. You can only allow more access to the contact when the default access is None .
Primary Contact	Turn on this switch to make the selected contact person the primary contact for this application. The primary contact can manage all contacts including the applicant.

4. If desired, update the contact's information, including name, business name, business title, email address, phone, and physical address. Turn on the switch to **Update this contact in the applicant's account** if you've made changes that should be saved to the applicant's account.
5. Click **Add**.

The contact appears as a new row in the grid.

Here's how to manually add a new contact:

1. Click the **Add New Contact** button on the Contacts page.
2. On the drawer, select a **Contact Type** from the drop-down list.
3. Turn on the **Active** switch to indicate this is an active contact.
4. In the **Access** section, click the **Full** button to update the contact's access to allow full access. You can only allow more access to the contact when the default access associated with the contact type is **None**.
5. Turn on the **Primary Contact** switch to make this contact person the primary contact for this application.

Note: The primary contact can manage all contacts including the applicant.

6. On the **Add new contact** drawer, enter the new contact's information, including name, business name, business title, email address, phone, and physical address.

Note: The email that you enter here must match the email that the contact used when registering if you want this person to have application access based on the contact type.

7. Turn on the switch to **Add this contact to the applicant's account** if the contact should be saved to the applicant's account.
8. Click **Add**.

The contact appears as a new row in the grid.

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

Updating Application Contacts

1. On the Contacts page, click the contact row to update their contact information.
2. On the **Contact details** drawer, update the contact type and detail information.

- If the contact is the applicant, you can't modify the name. This person will be identified as the applicant and active on the application unless you change the applicant. You can, however, change the contact type.
 - All fields are available to update for contacts other than the applicant.
3. Turn on the **Update Account** switch to save updates to the applicant's account.
 4. Click **Update**.

Removing Application Contacts

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

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

1. On the Contacts page, click the three-dot **Actions** button to view a menu of the available actions for the contact you want to remove.
2. Click *View Details* to open the **Contact details** drawer with the contact information for this person. This action is available for each contact.
3. On the **Contact details** drawer, click **Delete**.

Working with Contractors and Agents in Applications

Use the Contractor page displayed in the Redwood Experience to view or add contractors who are performing work for a permit or planning application. If the intake form for the application collects contractor or authorized agent information, the Contractor page initially displays the information provided during the intake process. Agency staff and registered users applying for applications and viewing application details in the Redwood Experience see the latest contractor license information without the need to manually refresh the information.

Applicants can designate a contact person for a contractor license and give the contact access to the application. Agency staff and contractors or contacts with application access can indicate whether a contractor is currently performing work. Contractor data is automatically refreshed from the agency's contractor records or integration with an external source.

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

Adding Contractors to an Application

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

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

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

- If the switch is turned on, only the contractor licenses that you are authorized to use are available for selection. If no licenses are available, you won't be able to add a contractor license to the transaction.
- If the switch is turned off, you can select from any of the agency-approved contractor licenses. Here are the steps for adding a contractor when you have access to the complete contractor list:

Here's how to add contractors to a permit application:

1. On the Permit Applications or Planning Applications list page, click the row for the application you are working with.
2. In the left navigation panel of the permit application details, expand the **People** section.
3. Select **Contractor** in the expanded section.
4. If the applicant is either a contractor or a contractor's authorized agent, turn on the switch to indicate yes. This option is only available for agency staff.
5. On the Contractor page for the application, click the **Add (+)** button.
6. On the **Add contractor** drawer, select a contractor license related to the application from the **Select a Contractor** drop-down list.
7. Click the **Select Contacts** button to select a contact, contact type, application access level, and indicate whether this is the primary contact and click **Done**.
8. Click the **Add** button to save the contractor to the application.

Using Advanced Search to Find a Contractor

1. On the Contractor page for the permit, click the **Add (+)** button.
2. On the **Add contractor** drawer, click the **Advanced Search** link.
3. Mark the **I know the exact license number** checkbox if you want to retrieve the contractor information by the exact license number, and enter the number in the **License Number** field.

This option is only available when your agency integrates with a licensing body. The search looks for a matching license in the agency-maintained contractor list then in the licensing body's database.
4. To find a contractor using the search, enter text in the **Business Name**, **Owner Name**, or **License Number** fields, or select a **License Type** from the drop-down list.
5. Click the **Find Contractors** button.
6. Select a row in the search results that appear on the drawer to select a contractor. Only approved contractors appear in the results.

If the agency has turned on the switch to **Limit License Usage to Authorized Contacts** during setup, then you can only see the contractor licenses that you're authorized to use.
7. Click the **Select Contacts** button to select a contact, contact type, application access level, and indicate whether this is the primary contact and click **Done**.
8. If one or more conditions have been applied to the license that prevent you from selecting the contractor, you can click the **View Details** link to view the condition summary for the license. Click **Cancel** on the **Add contractor** drawer to exit or start over if you want to find a different contractor.
9. Click the link to **Find Recently Selected and Associated Contractors** to return to the **Select a Contractor** drop-down list.
10. Click the **Add** button to save the contractor to the application.

Updating or Removing Contractor Information for an Application

On the Contractor page for the application, you can update some contractor information or remove contractors from the permit or planning application.

Note: Contractor license details can't be edited in the application during intake or after application submittal. However, changes can be made in the contractor record list or the external source to appear in the application. Once added to the application, the contractor information is automatically refreshed from the agency's contractor list or an external source, depending on agency setup.

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

1. If you're agency staff, turn the switch on for yes or off for no to answer **Is the applicant either a contractor or a contractor's authorized agent?**. Public users, who are usually homeowners, are not contractors or authorized agents. This switch is only available on permit and planning applications.
2. Click the three-dot **Actions** icon button and select from the available actions for a contractor license row, depending on your permissions and contractor implementation:

- **Edit** - Click to open the **Contractor details** drawer. You can also click the row in the grid to open the drawer.

The contractor details are automatically refreshed on permits and planning applications until they reach an end status. Throughout the application lifecycle, the contractor license information gets updated from the agency's main contractor list—or in some cases, an external source—and can't be modified on the application. However, if you have appropriate permissions, you can use the **In Use** switch to indicate whether the contractor is in use on the permit or planning application, and update the contractor contacts.

- **Delete** - Only system administrators and agency management with appropriate permissions can delete contractors from the grid after application submission.
3. On the **Contractor details** drawer, you can make these changes:

Page Element	Description
In Use	Turn on this switch to indicate whether the selected contractor is currently performing work. Contacts for contractors that are in use appear on the Contacts page in the application details.
Contact Persons	<p>Add or change the contact person for the contractor.</p> <p>You can select multiple contacts for the license. For each contact, click the Select Contacts button and choose the contact type. The available contacts are people associated with the contractor license on the Contacts page in the contractor record details. The contact initially has a level of application access based on the agency setup for the Contact Type that you select. But access can be upgraded in the application details. For more information, see Working with Application Contacts.</p> <p>Click the Delete trash can icon to remove a contact person from the application.</p>

4. Click **Update** to save your changes and close the contractor details.

Viewing Contractor History

As agency staff and registered users work with permit and planning applications in the Redwood Experience, they see the latest contractor license information. To preserve historical accuracy throughout the application's lifecycle, snapshots of the contractor license details are taken as the delivered application workflow progresses and saved on the permit's Contractor History page. Only agency staff with permissions have access to contractor history.

Agency staff can click the **View History** button on the Contractor page to open the Contractor History page, which displays the contractor license details for each contractor at the time the status was reached.

Note: If workflow is altered, the contractor history isn't captured, unless it corresponds to a productized end status, such as Completed, Certificate of Occupancy, or Denied. Historical details are also captured at delivered workflow statuses including Submitted, Withdrawn, and Expired, as well as when an application is reopened (agency chooses the status) or renewed (Submitted status).

The contractor license detail history for each contractor is retained on the transaction record when the application reaches an ending status. Depending on when the contractor was added to the permit or planning application, the system captures multiple point-in-time records of the license details, which are permanently stored with the permit or planning application. For information about customizing the timing of additional historical snapshots, see [Setting Up Contractor License History](#).

Working with Meetings

Meetings are scheduled between registered public users and agency staff to review and discuss the requirements of preapplications and planning applications. This topic describes the meetings pages displayed using the Redwood Experience interface.

A meeting is scheduled between the registered public user who has submitted a preapplication or planning application and the agency assigned planner, to review and discuss the requirements of the project.

Applicants and authorized agency staff can schedule meetings. The authorized staff include the planning assistant, zoning administrator, principal planner, and associate planner.

Administrators configure the system to enable the applicants and the agency staff to schedule meetings using the Meeting Setup Template page. See [Setting Up Meetings](#).

Security Details for Working with Meetings

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Access Planner Calendar	Access the planner calendar.	PSC Agency Staff – All agency users
PSC Planning Application Meeting Inquiry	View a planning application meeting.	PSC Agency Staff – All agency users

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

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

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

Viewing Meetings

Agency staff and registered public users view preapplication or planning application meetings in the application details on the Meetings page. In the left navigation panel, expand the **Communication** menu section, then click the **Meetings** menu link to open the Meetings page.

View the list of meetings, including this information:

- **Date** and **Time** - The date and time of the scheduled meeting.
- **Status** - The meeting status, for example, Scheduled or Canceled.

- **Subject** - What the meeting is about, entered in the subject line.
- **Meeting Location** - Where the meeting will occur.

Scheduling a Meeting

Planners use the **New meeting** drawer for scheduling preapplication and planning application meetings.

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

Here's how to schedule a planning and zoning meeting:

1. On the Meetings page in the preapplication or planning application details, click the **Schedule Meetings** button.
The **New meeting** drawer opens.
2. On the drawer, some information is prepopulated as set up in the meeting template associated with the application type. Enter or update values for these fields:

Page Element	Description
Schedule Date	Select a date for the meeting. The dates available for scheduling your meeting are based on the meeting template applied to the application type and the agency's holiday calendar. The meeting template is added to the preapplication or planning application type. For more information, see Setting Up Planning Application Types .
Scheduled Time	Select the start time for the meeting. The time values available for scheduling your meeting are based on the template applied by the agency.
Meeting Duration in Hours	View the duration of the meeting, which is set up by the agency in the template applied.
Meeting Location	View the location of the meeting. Only planners can change the location of the meeting.
Invitees	View the list of additional invitees for the meeting. Agency staff can add or remove invitees.
Subject	Review the subject for the meeting. Only planners can change the subject of the meeting.
Meeting Agenda	Review the agenda for the meeting. Only planners can change the agenda of the meeting.

3. Click the **Schedule** button to schedule the meeting and return to the Meetings page, where you see the newly scheduled meeting listed.

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

- When you schedule a business meeting, the workflow task **Schedule Business Consultation** will be updated to *Completed*.

- When you schedule a preapplication or planning application meeting, the workflow task **Schedule Meeting** will be updated to *Completed*.

For more about workflow, see [Using Workflow](#).

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

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

Updating, Rescheduling, or Canceling a Meeting

You can update, reschedule, or cancel a meeting on the Meetings page. Applicants can reschedule their meetings only if the administrator has enabled the settings in the meeting template that is applied to the application type.

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

- On the Meetings page in the preapplication or planning application details, click the **Actions** menu button.
- Select an action for the meeting:

Page Element	Description
View Details	<p>Click to open the Meeting details drawer.</p> <p>Depending on your permissions, you can update the meeting location, invitees, subject, and meeting agenda.</p> <p>Click Save to save your changes.</p>
Reschedule Meeting Time	<p>Click to open the Reschedule meeting drawer. Depending on your permissions, you can select a new available date and time for the meeting.</p> <p>Only planners can update the subject, agenda, and location of the meeting.</p> <p>Click Reschedule to save your changes. The Meetings page lists the meeting with the updated date and time, and the previous meeting record displays a Canceled status.</p>
Cancel Meeting	<p>Click to cancel the meeting. Click Cancel to confirm.</p> <p>This is a permanent change and no further updates can be made to the meeting. The Meetings page lists the meeting with a Canceled status.</p>

An online notification and email are sent to the applicant and to the assigned agency staff with the updated meeting schedule or canceled status, depending on the setup in the Communication template. For more information on communication event templates, see [Setting Up Communication Templates](#).

Working with Meeting Comments

Comments enable you to add additional information to a meeting schedule.

Here's how to add a meeting comment:

1. On the Meetings page in the preapplication or planning application details, click the **Add Comments** button.
The **Add comment** page opens.
2. Turn on the **Private** switch. Only agency staff can mark comments as private. Comments not marked as private are public, that is, visible to applicants and contacts with application access.
3. Add a new comment by entering the text. You can use the rich text options for formatting.
4. Instead of entering custom text, you can select recently used, existing standard, or favorite comments. For more information about standard comments, see [Working with Comments](#).

To update a comment on the Meetings page, click the comment row to open the **Comment details** page. Depending on your permissions, you can make changes to the comment privacy setting or text. Click **Save** to save updates or click **Delete** to delete the comment.

Viewing Meetings on the Calendar


Agency-assigned staff can use the calendar in the classic interface to view their own meeting schedules or all the meeting schedules for the entire agency.


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

1. Select the **Planner Calendar** tile on the Agency Springboard for preapplication, hearing, and planning application.

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

2. On the calendar page you can view the details of the meeting schedule. Click the application link to open the Hearing Details with a hearing summary, and access the Decision and Hearing page in the application detail pages.
3. On the calendar page you can perform these actions:

Page Element	Description
View	Click the drop-down list to select an option: <ul style="list-style-type: none">○ My meetings (Default)○ All meetings View the meeting schedules for consultation, preapplication, public hearing, and planning applications on the calendar. Click the Filter button to customize the view.
	Select to view the meeting schedules on a calendar. You can choose to view the calendar by month, week, or day. This view is the default selection.

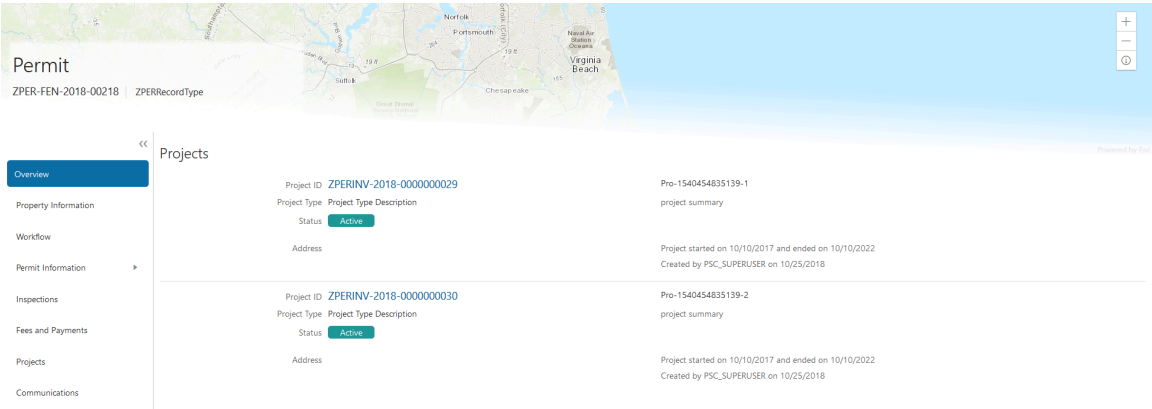
Page Element	Description
	Select to view the meeting schedules in a list format, with the current meeting displayed at the top followed by the future schedules. You use the Filter option to search the past and future meeting schedules. Use the Sort By and Search options to refine your search results.

Viewing Project Summaries

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

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

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



Viewing the Project Summary

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

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

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

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

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

Working with Communications

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

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

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 Applications

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 Applications

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Cashier PSC Principal Planner

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 the **Permits** or **Planning Applications** tile on the agency springboard.

Select an application on the applications page.

In the application details, click the **Communication** menu item in the left-hand navigation panel.


2. On the Communication page, click the **Add** button.
3. On the **New ad hoc message** page, enter values or click Insert (+) and choose from the list for these fields.


Message Attributes

Page Elements	Definition
Channel Type	<p>Specify what type of ad hoc message you want to send.</p> <p>The fields that are available to define on this page vary depending on the channel type and display format that you select.</p> <p>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.
Visibility	<p>Select which users can see this message listed on the application's Communication Details page. All communications can be viewed by agency staff.</p> <p>This option is presently not applicable for Code Enforcement.</p>


Page Elements	Definition
	<p>Values are:</p> <ul style="list-style-type: none"> ○ <i>Applicant and contacts</i>: Includes agency staff, the applicant, and contacts added to the transaction. ○ <i>Agency staff only</i>: Includes only agency staff. ○ <i>Applicant and Primary Contact::</i>: Includes agency staff and the primary contact on the transaction.
Display Format	<p>Select the format of the message.</p> <p>This field doesn't appear for the <i>Text</i> channel type.</p> <p>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.
Create Web Form	<p>Click to open the Web Form drawer where you create a questionnaire that you can insert into your message. Click the Insert Web Form once you're done creating the questionnaire.</p>

Email Attributes

Page Elements	Definition
<p>To</p> 	<p>Click in the field to enter email addresses for emails, user IDs for notifications, and phone numbers for texts.</p> <p>Click the insert icon (+) button to view the Insert into the To field drawer where you can search for and select recipients or transaction attributes. Click the Insert button on the drawer to add your selections.</p> <p>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 can't 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>For more information, see Using Attributes in Communication Templates.</p>
Cc and Bcc	<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>

Page Elements	Definition
	<p>These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>

Notification Attributes



Page Elements	Definition
<p>To</p> 	<p>Click in the field to enter email addresses for emails, user IDs for notifications, and phone numbers for texts.</p> <p>Click the insert icon (+) button to view the Insert into the To field drawer where you can search for and select recipients or transaction attributes. Click the Insert button on the drawer to add your selections.</p> <p>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 can't 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>For more information, see Using Attributes in Communication Templates.</p>

Attachments

Page Elements	Definition
Add	<p>Click to add an attachment from your local device.</p> <ul style="list-style-type: none"> ○ The maximum number of attachments in a single email is 5. ○ 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 won't be sent to the recipients even though it is saved in permitting and licensing communications.
Attachment information	<p>View this information for each attachment in the table:</p> <ul style="list-style-type: none"> ○ File Name ○ File Size

Page Elements	Definition
	<ul style="list-style-type: none"> ○ Description ○ Uploaded By and Uploaded On
Actions	Click the Actions icon for an attachment that you added to view the attachment details or delete attachments. You can also download attachments and use the search bar to find attachments.

Compose

Page Elements	Definition
From 	<p>Click the insert icon (+) button to view the Insert into the From field drawer where you can search for and select the current user email from the transaction attributes or agency email options, like no-reply. Click the Insert button on the drawer to add your selections.</p> <p>You can't edit this selection.</p>
Subject 	<p>Enter a brief description of the purpose and content of the message or click the insert icon (+) button to view the Insert into the Subject field drawer where you can search for and select attributes to include in the subject line. Click the Insert button on the drawer to add your selections.</p> <p>This field doesn't appear for the <i>Text</i> channel type.</p>
Message Body	<p>Enter text for the message body.</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>
Insert in Message Body	Click this button to view the Insert into the Message Body field drawer where you can search for and select attributes to include in the message body. Click the Insert button on the drawer to add your selections.

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

Answer Type	Description
<i>Attachment</i>	<p>Enables the recipient to attach one file per question.</p> <p>After the recipient uploads the file and submits the form, attachments are available in the web form response and on the Attachments page for the application.</p> <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 page displays a list of all messages that are associated with the application, including emails, notifications, texts, and web form responses.

1. Click **Communication** in the left-hand navigation bar in the application details.
2. On the Communication page, each message
You can view the date and time the message was sent, message subject, channel type, attachments, and status, such as *Sent*.
3. For each communication in the table, you may have the option to perform these actions.

- Click the **Actions** menu icon:

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

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

- Click the communication row in the table to view detailed information about the message, including the attachments.

Related Topics

- [Working with Ad Hoc Communications](#)
- [Using the Communication Center](#)

Working with Comments

This topic discusses how to use comments in permits, planning applications, and code enforcement displayed using the Redwood Experience interface. Agency staff can view, modify, and add comments on the Comments page in the application or case details.

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.

For information about working with comments in parcels, see [Working with Comments](#).

Security Details for Working with Comments

This section describes important security roles, requirements, or considerations specific to working with comments in permits and planning applications.

Permit Applications

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

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Apply Permit Duty PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician

Planning Applications

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

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

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

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.
You can also search the standard comments based on category and subcategory.
- *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 application or case you are working with.
2. In the left panel, under **Communication**, click the **Comments** link, to view the Comments page.
You view a list of comments in the right panel.
3. You can modify, delete, or hide a comment from public view only if it was entered by you. Click the specific comment row to open the detail view and make changes.
4. Click **Save**.

Adding a New Comment

1. Access the detail page for the application or case you are working with.
2. Click the **Comments** link in the left-panel navigation to view the Comments page.
3. Click the **Add Comment** button to open the Add comment drawer and enter a new comment.

Turn on the **Private** switch, to keep a comment private and hidden from public view. You can also toggle between hide and show.

You can use the **Rich Text Editor** option for formatting your comment with tools such as the numbered list. 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.

Viewing 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:

From the **Select Comments** section, on the **Add comment** page or drawer, view the three categories of comments:

- *Recent*: Comments that were recently posted.
- *Standard*: All the predefined comments available. You can also search the standard comments based on category and subcategory.
- *Favorite*: Comments that you have marked as favorite.

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, from the **More Actions** menu, click the  **Add to Favorites** button. 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 *Managing Comments* page.

7 Working with Planning Application Expiration

Security Details for Working with Planning Application Expiration

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

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

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

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

Expiration Overview

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

Expiration Rules

Your agency defines expiration rules that determine the expiration dates for permits, planning applications, and business licenses. The expirations apply to different phases of the permit, planning application, or business license lifecycle. The system calculates expiration dates based on transaction statuses, or for business licenses with a fixed date expiration rule, a specified date. The rules can include grace periods, which provide extra time beyond the

expiration date for the user to take action. The rules also can include extensions for permits and planning applications, which provide a way for you to add time to the expiration timeframe. Note that pending inactive applications can't be extended.

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

Business License Expiration Dates

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

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

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

Business License Consultation Expiration Dates

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

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

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

Permit Expiration Dates

Expiration rules for permit applications define the following:

- When an inactive pending application expires.
The expiration timeframe begins when the user saves an application and ends with application submission.
- When the application expires.
The expiration timeframe begins when the agency accepts an application and ends when the permit is issued.
CAUTION: When an application expires, all plan review tasks associated with the application are canceled.
- When the permit expires.
The expiration timeframe begins when the agency issues the permit and ends when the Certificate of Occupancy is issued or the permit is completed.

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

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

Planning Application Expiration Dates

Expiration rules for planning applications define the following:

- When an inactive pending application expires.
The expiration timeframe begins when the user starts an application and ends with application submission.
- When the entitlement expires.
The expiration timeframe begins when the agency issues the completed entitlement and ends when the user submits the permit application.

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

Pre-Application Expiration Dates

Expiration rules for preapplications define the following:

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

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

Processing Expiration Status

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

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

to indicate that the application is about to expire and when it expired and sends out communications based on the updated status and the rule. If the rule includes a grace period, such as 3 days, the system status changes to expired after 33 days of inactivity.

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

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

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

Working with Application Expiration

You can view and extend expiration dates for different types of permit and planning applications that are determined by rules set up by your agency.

You view the expiration dates on the list of applications with permit and planning application information as well as on the individual application's Overview page.

Viewing the Expiration Dates

Here's how you can view expiration dates:

1. Select **Permits** or **Planning Applications** on the Agency Springboard.
2. On the Transactions list page, you see the list of permit or planning applications for the agency.

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

Here's an example of what you would see on the Transactions page: If the expiration rule is set up to show that the pending application is about to expire in 5 days due to inactivity, the expiration date displays *Expires in 5 days on <date>* before the application expires. When the application expires, you'll see *Expired on <date>*.

3. To view the expiration on the Overview page of the application, click the row for the application on the Transactions list page. You'll see the date next to the **Expiration Date** field and the status, such as *About to expire* or *Expired* in the **Status** field.

Extending Expiration Dates

Depending on the rules created for an application type, you can manually extend the deadlines for an application. When one or more extensions are possible, the **Extend** link is available for you to enter a new expiration date. You must have appropriate permissions associated with your role to manually extend a permit. The link is available during the period when the application is about to expire and also during the grace period.

Note: With the exception of inactive pending applications, you can manually extend the expiration dates as defined for the application type in the rules setup.

Depending on expiration rules setup, permits can also be extended automatically based on inspection activity. Both manual and automatic extensions count toward the number of extensions allowed. For information about setting up automatic extensions as well as the number of extensions allowed, see [Setting Up Permit Expiration Rules](#).

Updating Application Expiration Status

You update the application expiration status using a process that runs against predefined rules.

You run the process that updates expiration statuses on the Process Expiration Rules page, which you access by selecting **Common > Process Expiration Rules**. Oracle recommends that you schedule expiration rules processing to run daily.

Note: After setting up expiration rules, you must periodically run batch expiration rule processing to update the *About to Expire* and *Expired* statuses. The system updates the statuses and sends out communications according to the setup.

Here's an example of how the processing works: An agency created a rule for solar permits that indicates application expires in 30 days. The period of time when a notification appears for applications about to expire is 5 days. During processing, the system updates the status to *Expired* when the application expires. That is, when the permit is not issued within 25 days, the application is about to expire, and at 30 days, the application expires. If the rule includes a grace period, such as 3 days, the system status changes to *Expired* after 30 days, but resets if there is activity within the 3-day grace period. Processing triggers alerts and notifications when the application is about to expire and upon expiration.

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

Entering Parameters to Process Expiration Rules

1. Access the Parameters tab on the Process Expiration Rules page.
2. Select the **Classification** for which you are updating expiration dates: *Planning and Zoning* or *Permits*.

Scheduling the Process

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

Page Element	Description
Frequency	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none">○ <i>Once</i>: Select to run the process one time only.○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.○ <i>Daily</i>: Select to run the process at regular intervals in days. <p>Note: <i>Daily</i> is the recommended option for running the expiration status update process.</p>

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

Page Element	Description
Repeat – By date	<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>
Month	<p>Select the months in which you want your process to run.</p> <p>Note: This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- On success
- On error
- On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

8 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.

For more information about working with time entries associated with permits, see [Viewing Recorded Time for an Application](#).

You add time entries directly on the respective pages for the transaction you are working on.

Home

Search

99+

Reports

Users

Grid

SC

Case

Hearing

C-221215-00483 | Inoperable Vehicle

1421 San Antonio Ave, Alameda

Overview

Timeline

Property Information

Workflow

Inspections

Notices

Communication

Case Information

Responsible Parties

Citations

Time Recording

Fees and Payments

Related Transactions

Time Recording

Recorded Time

Unassessed

Assessed

Download

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

For information about entering time spent working on a permit inspection using the Time Recording page in the Inspector Application for mobile devices, see *Reporting Inspection Time*.

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 for which you have already recorded time.

This is an example of a Time Recording page accessed from the agency springboard

Time Recording

☐ Show All Statuses

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. You must have appropriate permissions to add time entries.

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

Sam Cook

* Time Type Code

CECASERCH

Category

CE Case

Subcategory

CE_Case_Research

* Date

11/30/23

Hours

1

Minutes

30

Comments

Override of hourly rate

Bill Rate (USD)

150.00

Override Bill Rate (USD)

140.00

Billable

Assess Now

Total Fees

Cancel

Save

ORACLE

185

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:
 - Edit the time entry fields.
 - 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.

Permit
CK-2020-00156 CKPERMITTYPE01
3904
Arlington, US-VA 22201

Time Recording

Recorded Time Unassessed Assessed

Assess Fees

Source	Name	Category	Subcategory	Date	Hours	Minutes	Billable	Total Fees
<input checked="" type="checkbox"/> Inspection CKPLU-2020-00019	Jacob Smith	TRAVEL	Flight	10/11/20	4	30	Yes	558.54 USD
<input type="checkbox"/> Inspection CKPLU-2020-00019	Peter Nelson	TRAVEL	Flight	10/11/20	8	25	Yes	1,044.69 USD

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 checkbox 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.

9 Managing Plan Reviews

Security Details for Managing Plan Reviews

This topic describes important security roles, requirements, or considerations specific to managing plan reviews in permits and planning applications.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	View plan reviews on applications on which the current user is the applicant.	PSC Registered Public User
PSC Agency Permits Inquiry	View all plan reviews and comments.	PSC Agency Staff - All agency users
PSC Agency Planning and Zoning Inquiry	View all plan reviews and comments.	PSC Agency Staff - All agency users
PSC Add Comments to Plan Reviews Assigned to Self	Add comments to plan reviews assigned to self.	PSC Plan Reviewer
PSC Add Comments to Plan Reviews Assigned to Others and Self	Add comments to all plan reviews.	PSC System Administrator PSC Planning Coordinator PSC Permits Management with Elevated Access
PSC Update Plan Review Comments Added by Self	Update plan review comments added by self.	PSC System Administrator PSC Plan Reviewer PSC Planning Coordinator PSC Manage Plan Review Cycles in Planning Applications All PSC Manage Plan Review Cycles in Planning Applications Self
PSC Update Plan Review Comments Added by Others and Self	Update plan review comments added by others and self.	PSC System Administrator PSC Planning and Zoning Application Administrator
PSC Delete Plan Review Comments Added by Self	Delete plan review comments added by self.	PSC System Administrator PSC Plan Reviewer PSC Planning Coordinator PSC Manage Plan Review Cycles in Planning Applications All

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Manage Plan Review Cycles in Planning Applications Self
PSC Delete Plan Review Comments Added by Others and Self	Delete plan review comments added by others and self.	PSC System Administrator PSC Planning and Zoning Application Administrator
PSC Add Documents to Plan Review Cycles	Add documents to plan review cycles for review by plan reviewers.	PSC System Administrator PSC Planning Coordinator
PSC Remove Documents from Plan Review Cycles	Remove documents from a plan review cycle.	PSC System Administrator PSC Planning Coordinator
PSC Add Reviewer to Permit Plan Review	Add reviewer to permit plan review.	PSC System Administrator PSC Planning Coordinator
PSC Remove Reviewer from Permit Plan Review	Remove reviewer from permit plan review.	PSC System Administrator PSC Planning Coordinator
PSC Update Plan Review Decision Status Assigned to Self	Update plan review decision status assigned to self.	PSC Plan Reviewer
PSC Update Plan Review Decision Status Assigned to Others and Self	Update plan review decision status assigned to others and self.	PSC System Administrator
PSC Manage Plan Review Cycles in Planning Applications Self	Manage plan review cycles in planning applications assigned to self.	PSC Associate Planner
PSC Override Status of Permit Plan Reviews	Override status of permit plan reviews.	PSC System Administrator PSC Planning Coordinator
PSC Cancel Cycle of Permit Plan Review	Cancel cycle of permit plan review.	PSC System Administrator PSC Planning Coordinator
PSC Add Session Cycle for Plan Review Cycles	Add a Bluebeam Studio™ Session for a plan review cycle for electronic document review.	PSC System Administrator PSC Planning Coordinator
PSC Update Session to Finalized for Plan Review Cycles	Update a Bluebeam Studio™ Session to finalized for a plan review cycle to close the cycle for document review.	PSC System Administrator PSC Planning Coordinator

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

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

Plan Review Overview

Some applications require a plan review to evaluate the proposed project. The documentation is reviewed by all pertinent city departments to ensure compliance with applicable codes and regulations before permits are issued or for planning and zoning.

Plan reviews are tracked in Oracle Permitting and Licensing as part of permit and planning application workflow. Agency setup determines whether a plan review is required for a permit or planning application type. For more information, see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

Any review cycle for a permit or planning application can be conducted with or without an integration with Bluebeam Studio™, an electronic document review tool.

Note: To set up a Bluebeam Studio™ integration, contact Oracle Support. You must also enable electronic plan reviews in the agency-level options for permits and planning applications. For more information, see [Setting Up Electronic Plan Review](#).

This is what the steps for a plan review look like:

1. A registered public user submits a permit or planning application that requires review by agency staff.
2. A permit technician or assigned planner assigns a status to the transaction that requires a plan review. This triggers the automatic creation of the first plan review cycle. For more information, see [Using Workflow](#).
3. If configured by the agency, the system automatically assigns departments and reviewers to the first cycle of the plan review. The plan coordinator can also manually assign reviewers to a plan review cycle in the permit or planning application details, or on the Plan Review Console. See [Managing Plan Reviewers](#) and [Using the Plan Review Console](#).
4. The plan coordinator attaches documents, if any, to the plan review cycle from the application attachments. See [Managing Plan Review Documents](#).
5. When an integration with Bluebeam Studio™ Sessions exists, the plan coordinator can initiate an electronic Studio Session for the plan review cycle at any time until the review cycle is complete or continue with a manual review cycle. See [Working with Electronic Plan Reviews](#).
6. The assigned plan reviewers complete their review. See [Performing Plan Reviews](#).
7. The plan coordinator adds new plan review cycles and repeats the review process as necessary until the review is complete. See [Managing Plan Review Cycles](#).

Plan reviews can be created and updated in application statuses in addition to *Plan Review* as long as the permit or planning application isn't in a presubmittal or terminal status.

Permit statuses:

- Yes, you can create or update plan reviews for permits in these permit statuses: *About to Expire, Accepted, Delinquent, Expired, In Process, Inspection, Permit Issued, Plan Review, and Submitted*.
- No, you can't create or update plan reviews for permits in these permit statuses: *Certificate of Occupancy, Completed, Denied, Payment Pending, Pending, Pending Submittal, Void, or Withdrawn*.

Planning application statuses:

- Yes, you can create or update planning application plan reviews in these planning application statuses: *About to Expire, Application Accepted, Delinquent, Expired, Hearing, In Process, Plan Review, and Submitted.*
- No, you can't create or update planning application plan reviews in these planning application statuses: *Completed, Denied, Payment Pending, Pending, Pending Submittal, Void, or Withdrawn.*

Plan Review Workflow

The plan review workflow for the plan coordinator appears on the Task Management page.

As a plan coordinator, you sort tasks by *Workflow*. For more information about workflow, see [Using Workflow](#).

When the last reviewer provides a decision status for a plan review cycle, it is automatically closed. Upon closing, the overall review status changes to *Complete*. If a review cycle uses a Bluebeam Studio™ Session, the plan coordinator finalizes the cycle.

The system also updates the plan review cycle details with the most severe decision status from the individual plan reviewers. The decision statuses are listed here, from most to least severe: *Rejected, Revision Required, Approved with Comments, Approved, and Not Required.*

Workflow is automatically moved forward to the next step when all of the following criteria are met:

- The current plan review cycle status is *Complete*.
- The plan review decision is *Approved, Approved with Comments, or Not Required.*
- The review cycle has been finalized, if a Bluebeam Studio™ Session was used.

If plans have one or more rejections, or revisions are required, the plan coordinator may require the applicant to correct the plans and resubmit them for another review cycle.

The workflow process definition must identify the plan review task and the action to take when automatically advancing. For more information, see [Using Custom Properties](#).

Plan Review Communications

For information about plan review communication events, such as when a plan review is finalized, completed, or canceled, see [Delivered Communication Events](#). For information about sending communications when cycle or reviewer due dates are approaching, see [Setting Up Notifications for Plan Review Due Dates](#).

Managing Plan Review Cycles

The plan coordinator manages the plan review cycle, which is a series of plan reviews for a permit or planning application completed by multiple reviewers.

You manage review cycles on the Plan Reviews page in the permit or planning application details. This topic discusses how to manage plan review cycles, including these actions:

- Add plan review cycles.
- Add plan review due dates.
- Finalize or cancel plan review cycles.
- Switch between different plan review cycles and view cycle history.

- Record time for plan reviews.

Your agency can conduct reviews that contain both manual cycles and electronic cycles using Bluebeam Studio™. For information about starting a Bluebeam Studio™ Session during a review cycle, see [Working with Electronic Plan Reviews](#).

Here's how to access the Plan Reviews page for a permit or planning application.

- From the Plan Reviews console for agency staff in the classic user interface:
 - a. Select the **Plan Reviews** tile on the Agency Springboard.
 - b. Select a plan review row on the **All Reviews**, **Open Reviews**, or **Unassigned Reviews** tabs.

You can also select a row in the **Pending** tab of console. The plan review rows here appear for permits in the plan review status even though there are no open plan review cycles, and the applicant has uploaded a new attachment.
- From the Permit Applications or Planning Applications list page in the Redwood Experience:
 - a. Select the row of the application that you want to work on.
 - b. In the left navigation panel of the permit or planning application details, select **Progress > Plan Reviews**.

Tip: You can access this page on a mobile device as well as on a laptop or desktop computer.

Adding Plan Review Cycles

The first cycle of a plan review is automatically created when a permit technician or assigned planner moves the transaction into *Plan Review* status. If you manually create a plan review cycle before the *Plan Review* status, the system won't automatically create the cycle. You can add subsequent cycles until the plan review is complete.

Review cycles can be added and updated in application statuses in addition to *Plan Review* as long as the permit or planning application isn't in a presubmittal or terminal status. For more information, see [Plan Review Overview](#).

1. On the Plan Reviews page, click the **Add New** button to add a new plan review cycle.
2. On the **New plan review** drawer, enter the review cycle name.

If the option to **Enable Default of Plan Review Name** is turned on for the agency, the default review cycle name is the name of the previous cycle. Otherwise, there is no default name. You can update the cycle name at any time on the Plan Reviews page by selecting **Edit Plan Review Details** in the cycle action menu.

3. Select the checkbox to **Copy reviewers from most recent cycle** if you want to copy the reviewers from the previous cycle, regardless of whether the previous cycle was manual or electronic.
4. If your agency integrates with Bluebeam Studio™, you have two additional options:
 - **Copy marked up documents from most recent cycle** - Select to copy documents from the previous cycle if the cycle was electronic.
 - **Create studio session** - Click to start a Bluebeam Studio™ Session, which makes the new cycle an electronic one.

You can also start a Studio Session later, while the review cycle is in progress. For more information about working with an electronic plan review cycle, see [Working with Electronic Plan Reviews](#).

5. Click the **Add** button on the drawer.

Depending on your agency's plan review setup, plan review cycle and reviewer department due dates may be generated. Due dates may be automatically generated when a plan review is manually added or a first plan review cycle is automatically created.


The **Review Cycle** tab appears with review information and cycle-specific sections, including Reviewers, Documents, Comments, Record time.

The cycle must be canceled or completed before you can add another new plan review cycle. That is, you can have only one active plan review cycle at a time. You can switch between multiple cycles by selecting the cycle tabs, for example, **Review Cycle 1** or **Review Cycle 2**, and so on, to view reviewer and other cycle details.

Automatically Adding Plan Review Due Dates

Agencies can configure the plan review system to automatically calculate cycle and plan reviewer department due dates for a permit or planning application type. The due dates are populated on the Plan Reviews page in the application details and on the Plan Reviews console page when a plan review is created. The generated due dates can also be manually updated.

An **Overdue** icon appears next to review cycles and due dates that are past due: 

A **Reviewer Due Date After Cycle Due Date** clock icon appears for reviewer due dates that have been configured to be after the cycle due date: 

Due dates are calculated using time rules and time policies set up by your agency. Time rules can be leveraged to define the maximum review time for first or subsequent reviews as well as due dates based on plan reviewer department turnaround times. You associate the time rules with the permit type or planning application type so that different application types can have different due dates. For more information about using time rules to calculate due dates, see [Setting Up Plan Review Due Dates](#).

If there are no time rules but the agency has turned on the **Enable Cascading Cycle Due Date** switch for permit or planning application plan reviews, then agency staff with permissions have two options for copying the cycle due date to the reviewers:

- Click the **Actions** menu button and select **Edit Plan Review Details**. On the Plan review details drawer, select **Copy this due date to plan reviewers**.
- Click the **Actions** menu button and select **Copy Due Date to Plan Reviewers**.

When you select the option to copy the cycle due date, the system copies the date over to the reviewer due dates that are blank but doesn't override any existing reviewer due dates.

For more information on agency-level plan review options for permits and planning applications, including cascading cycle due dates, see [Setting Up Agency-Level Options for Permits](#) and [Setting Up Agency-Level Options for Planning Applications](#).

Manually Adding Plan Review Due Dates

To manually add a due date for a plan review cycle, click the **More Actions** button for the active review cycle. Select the **Edit Plan Review Details** menu item to open the **Plan review details** drawer. In the **Due Date** field, enter a date or select a due date using the calendar icon. Click **Update** to apply the due date.

The checkbox to **Copy this due date to reviewers** is available if the **Enable Cascading Cycle Due Date** switch is turned on for the agency. Mark the checkbox for the plan review cycle to fill in any reviewer due dates that are blank. However,

if there are time rules defined for the application type to automatically add plan review due dates, the time rules are used to calculate the plan review due dates instead. If there are no time rules, then the cascading due date applies.

You can set up the system to send communications when cycle or reviewer due dates are approaching. For more information, see [Setting Up Notifications for Plan Review Due Dates](#).

Finalizing or Canceling Plan Review Cycles

To finalize an electronic plan review cycle, click the **More Actions** button for the active cycle. Select the **Finalize Review Cycle** menu item when all of the review decisions have been provided. At this point, the electronic plan review cycle status is Complete. After you finalize the cycle, marked up documents copied back from the Bluebeam Studio™ Session can't be edited. For more information, see [Working with Electronic Plan Reviews](#) and [Managing Plan Review Documents](#).

Click the **Cancel Review Cycle** action to cancel a manual or electronic plan review cycle that is active. This option is available when a manual plan review cycle has a status of *In Progress* or until an electronic plan review has been finalized.

Your agency may require comments for review cycle cancellations.

Canceling a cycle sets the review cycle status to *Canceled*. After canceling, the cycle and review details are read-only. All active tasks associated with the plan review are canceled when the plan review cycle is canceled.

Note: An active plan review cycle is canceled when the transaction that it is associated with is withdrawn.

Viewing Plan Review Cycle History

You can switch between plan review cycles to view details for each cycle, including the **Reviewers**, **Documents**, **Comments**, and **Record time** sections.

1. Click the **Review Cycle** tab with the cycle number below the page title. For example, **Review Cycle 1** or **Review Cycle 2**.

Multiple tabs are only available when there are two or more plan review cycles.

2. Look for this icon to view plan review cycle history: 

- Click the **View Cycle History** icon on complete review cycles.
- Click the **View Cycle History** item in the actions menu on in-progress review cycles.

The **Cycle history** drawer displays a table with the review cycles for the application, including their status and summary information.

Recording Time for Plan Reviews

Agency staff can use the **Record time** section for the cycle to record the time they spend on their plan reviews. For more information, see [Adding Time Entries](#) and [Viewing Recorded Time for an Application](#).

Using the Plan Review Console







Accessible from the Plan Reviews tile on the agency springboard, the Plan Reviews console page provides centralized views for managing your agency's plan reviews. All agency staff can view plan reviews in the console and navigate to the permit or planning application's plan review details by clicking a plan review row. Plan coordinators can assign and reassign plan reviews depending on their job role configuration.



The Plan Reviews console page comprises these pages:

- Plan Reviews - All Reviews page
- Plan Reviews - Open Reviews page
- Plan Reviews - Unassigned Reviews page
- Plan Reviews - Pending Reviews page
- Plan Reviews - Reviewer Workload page

Your agency configures which plan coordinators can assign reviewers in the plan review console on the Open Reviews, Unassigned Reviews, and Reviewer Workload pages. Plan coordinators can make assignments based on their job attributes for application type and department set up by the agency; they can assign to all departments or all application types when the job attributes for the job function are set to blank. For more information on defining these job attributes, see [Setting Up Agency Staff](#).

In addition to summary plan review information on each page, icons are used to provide additional details about the transaction or plan review. You can also select actions from the **Actions** menu.

Page Element	Description
	Indicates the column that shows condition icons when a grid is displayed in the expanded format. For more information about conditions placed on permits or planning applications, see Applying Conditions to Applications .
 Lock  Hold  Notice	Appears in the transaction row to indicate that one or more conditions have been applied to the transaction. The icon for the most severe condition is displayed. Click the icon to view condition information. See also Setting Up Conditions .
	Indicates an electronic plan review cycle with a Bluebeam Studio™ Session.
	Indicates that fees are due for the transaction. Click the Fees Due icon to view more details.

Page Element	Description
	Indicates that an applicant has uploaded a PDF document to a permit or planning application that's in a plan review status. Click to open the Uploaded Documents page, where uploaded documents can be previewed.
	Click the Actions menu button for a permit or planning application to see the actions menu, where you can select an available action: <ul style="list-style-type: none">• Add Cycle Comments - Add a cycle-level comment to the current plan review cycle for a permit or planning application that's in progress and view existing cycle comments. You can add, update, or delete cycle-level comments for plan reviews in any cycle status until the application is closed.• View Plan Comments - Review a list of consolidated plan comments for the permit or planning application.• View Cycle History - Review cycle and reviewer statuses and decisions across all cycles as well as reviewer due dates and the length of time a cycle was open.

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

All Reviews

The All Reviews page displays in-progress plan review cycles by assigned department and reviewer. Each plan review listed includes transaction, property, reviewer, and cycle information.

This example illustrates the Plan Reviews - All Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field. The date filters are configured for all date types in a specified date range, and the **My Job** switch is turned on.

Plan Reviews

All Reviews													
Open Reviews				Unassigned Reviews				Pending Reviews				Reviewer Workload	
<div><div>All Date Types</div><div>Date Range</div><div>10/1/22</div><div>To</div><div>11/21/22</div><div></div></div>				<div><div></div><div></div><div></div><div></div><div></div></div>				<div><div></div><div></div><div></div><div></div><div></div></div>				<div><div></div><div>My Job</div><div>Show All Application Statuses</div><div>Show All Cycles</div><div>Search</div><div></div><div></div></div>	
Department	Application	Application Type	Application Status	City	Description	Reviewer	Reviewer Due	Reviewer Decision	Decision Date	Cycle	Cycle Created	Cycle Status	Actions
Building	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Utilities	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Charles Lake	10/5/22			1	10/4/22	In Progress	
Electrical	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Betsy King	10/5/22			1	10/4/22	In Progress	
Fire Protection	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Electrical	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Betsy King	10/5/22			1	10/4/22	In Progress	
Fire Protection	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Building	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Utilities	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Charles Lake	10/5/22			1	10/4/22	In Progress	

These switches are available to filter the plan reviews displayed on the page:

Page Element	Description
My Job	For plan coordinators or plan reviewers, view only plan reviews that match with the application types and departments assigned to you in your respective job role definitions.
Show All Application Statuses	View the plan reviews for applications that are in a final status—including <i>Completed</i> , <i>Certificate of Occupancy</i> , <i>Void</i> , <i>Withdrawn</i> , or <i>Denied</i> —in addition to the other statuses.
Show All Cycles	View all review cycles, including the closed review cycles for the permit and planning applications.

You can also use a variety of date filters to view the plan reviews. Your agency can choose the default values for the date type and time period fields in the agency-level setup options. See *Setting Up Agencies*.

Select a value in the date type drop-down list:

- *Cycle Due* - The date when the plan review cycle is scheduled to be completed.
- *Cycle Created* - The date when the plan review cycle was created.
- *Reviewer Due* - The date by which the plan reviewer must provide a decision.
- *Reviewer Decision* - The date when the plan reviewer provided a decision.
- *Cycle Decision* - The date when the cycle decision was provided.
- *All Dates* - All date types.

Then select a value for the time period from the drop-down list:

- *Today*
- *Yesterday*
- *Tomorrow*
- *Last 14 Days or Next 14 Days*
- *Last 30 Days or Next 30 Days*
- *Date Range* - Enter start and end dates in the provided fields when you select this option. (An agency-level default can't be set up for this option.)

Click a cycle row to open the application's Plan Reviews page.

Open Reviews

Plan coordinators can see a list of plan reviews that don't have a cycle decision yet on the Open Reviews page.

This example illustrates the Plan Reviews - Open Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field.

Plan Reviews

All Reviews

Open Reviews

Unassigned Reviews

Pending Reviews

Reviewer Workload

My Job

Search

	Cycle	Cycle Due	Application	Application Type	Application Status	Submitted	Property	City	Description	Actions
<div><div></div><div></div></div>	1	4/21/22	ELEC-2022-00028	Electrical	Plan Review	4/7/22	Walnut Street	ALAMEDA	Electrical for an added kitchen island.	<div></div>
								</		

As a plan coordinator or plan reviewer, you can turn on the **My Job** switch to display only plan reviews for application types that match the application types assigned to you in your job role configuration.

The row for each plan review cycle displays cycle, application, and property information. Each cycle row expands to show the departments and reviewers assigned to the cycle, reviewer assigned and due dates, reviewer decision, and decision date. You can select the reviewer row to add or change the assigned reviewer depending on your Plan Coordinator job role configuration for application type and department. In the reviewer details, the reviewer drop-down list displays the available reviewers and a count of plan reviews assigned to each of them. The reviewer due date can also be updated.

Click a cycle row to open the application's Plan Reviews page.

Unassigned Reviews

On the Unassigned Reviews page, you can view:

- Plan review cycles with one or more departments that have no reviewer assigned.
- Required departments that aren't in the cycle.

This example illustrates the Plan Reviews - Unassigned Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field.

Plan Reviews

All ReviewsOpen ReviewsUnassigned ReviewsPending ReviewsReviewer Workload


My Job

Search

	Application	Plan Review Name	Cycle	Cycle Due	Department	Application Type	Description	Property	City		Actions
	ELEC-2022-00058	Residential Electrical	1	10/5/22	Building, Fire Protection	Residential Electrical	Residential Electrical	1005 Lincoln Avenue	ALAMEDA		
	ELEC-2022-00059	Residential Electrical	1	10/5/22	Building, Fire Protection	Residential Electrical	Residential Electrical	1005 Lincoln Avenue	ALAMEDA		
	MECH-2022-00026	Residential Mechanical	1	10/5/22	Building, Engineering, Fire Protection	Residential Mechanical	Single family residence.	1719 St. Charles Street	ALAMEDA		

Each row displays the transaction ID, cycle name and number, cycle due date, unassigned department, application type, and property.

As a plan coordinator or plan reviewer, you can turn on the **My Job** switch to display only plan reviews for application types and departments that match the application types and departments assigned to you in your job role configuration.

Plan coordinators can click the **Assign** icon for a plan review to open the Add Reviewers page: . The **Assign** icon is only available when the plan coordinator's job attributes for application type and department match the plan review's application type and department.

The tabs on the Add Reviewers page list plan reviewers that are associated with the property's plan review district, if there's a district associated with the parcel, and all reviewers. You can filter reviewers by department and assign reviewers to the cycle. You can also view the reviewer workload in a calendar view, featuring a bar chart of daily assignments by reviewer and department, and indicators with total and overdue counts.

For more information about assigning reviewers, see *Managing Plan Reviews*.

Pending Reviews

The Pending Reviews page helps agency staff manage plan reviews with revised documents or waiting for revised documents. Permits and planning applications appear in the pending reviews list when:

- The application is in a plan review status and the applicant has uploaded a PDF document.
Applications in a plan review status again after the plan was approved, approved with comments, or not required also appear in the list.
- The last plan review cycle was completed with a decision of *Rejected* or *Revision Required*.

This example illustrates the Plan Reviews - Pending Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field.

Plan Reviews

All Reviews

Open Reviews

Unassigned Reviews

Pending Reviews

Reviewer Workload

Download

My Job

Search

<div></div>	Decision	Decision Date	Review Name	Cycle	Application	Application Type	Application Status	Submitted	Property	City	Description	Actions
<div>Rejected</div>	4/11/22	Mechanical	1	MECH-2022-00008	Mechanical	Plan Review	4/10/22	Walnut Street	ALAMEDA	Mechanical	<div></div>	

As a plan coordinator or plan reviewer, you can turn on the **My Job** switch to display only plan reviews for application types that match the application types assigned to you in your job role configuration.

When an applicant adds a PDF document to the permit or planning application, an Uploaded Documents icon appears on the permit or planning application row in the pending reviews list as shown in this example. Click the icon to open the Uploaded Documents page where you can preview the file and mark the document as seen.

Click the application row to open the application's Plan Reviews page, where you can create a new cycle and add revised documents to the cycle. For more about working with revised documents, see [Managing Plan Review Documents](#).

Reviewer Workload

The Reviewer Workload page displays a list of reviewers based on the plan coordinator's assigned plan reviewer departments and application types in the agency staff job attributes. Two views, the grid view and the calendar view, provide reviewer workload information to help manage reviewer assignments. The grid view provides counts of assigned and overdue plan reviews for each reviewer as well as application and plan review details. The calendar view displays a bar chart of daily assignments by reviewer and department, and indicators with total and overdue counts.

This example illustrates the grid view of the Plan Reviews - Reviewer Workload page in the console.

[All Reviews](#) [Open Reviews](#) [Unassigned Reviews](#) [Pending Reviews](#) [Reviewer Workload](#)

- **Reviewer:** Displays the reviewer name. Click the reviewer name to expand a section that displays application and plan review information. Click a row to open the application's Plan Reviews page.

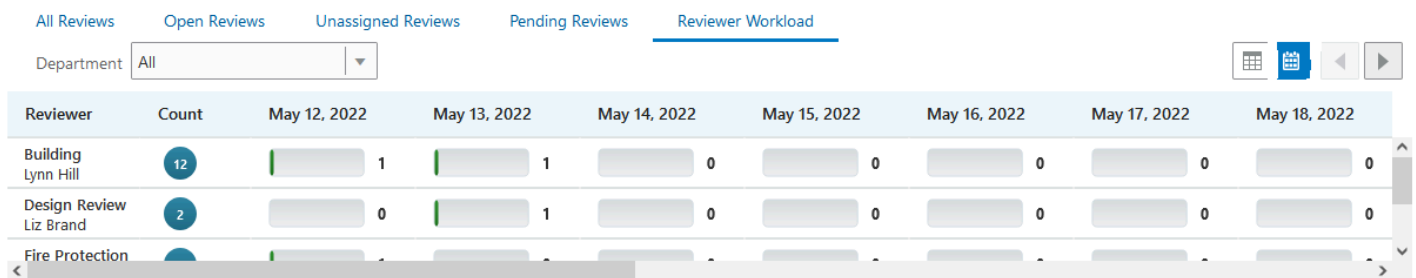
Depending on your Plan Coordinator job role configuration for application type and department, you can click the **Assign** icon for a plan review to display the Reviewer Details modal page. The list of available reviewers that

can be assigned includes the total number of plan reviews assigned to each reviewer. Select a reviewer and a review due date.

- **Review Count:** Displays the number of reviews assigned to a reviewer.
- **Overdue:** Displays the number of reviews that are overdue.

This example illustrates the calendar view of the Plan Reviews - Reviewer Workload page in the console.

Plan Reviews



The **Count** badge displays the total count for each reviewer-department combination and you can hover over the badge to see the overdue count. The daily count is shown in the graph.

For more information about assigning and reassigning plan reviews to manage reviewer workload, see [Managing Plan Reviewers](#).

Working with Electronic Plan Reviews

Your agency can conduct plan reviews that contain electronic plan review cycles.

Review cycles for a permit or planning application can be conducted with or without an integration with Bluebeam Studio™ Sessions, an electronic document review tool. When you start a plan review using Bluebeam Studio™ Sessions, the plan review cycle is considered electronic. The next cycle can be manual or electronic. You can start a Studio Session when you add a new plan review cycle or at any time during a review cycle until the cycle is complete.

Note: To set up a Bluebeam Studio™ integration, contact Oracle Support. You must also enable electronic plan reviews in the agency-level options for permits and planning applications. For the integration to work, add the email addresses for reviewers found in their agency staff profiles to the Bluebeam Studio™ portal. For more information, see [Setting Up Electronic Plan Review](#).

Depending on your agency's protected document handling for permit and planning applications, you may be able to use archived-protected PDF documents in electronic plan reviews. For more information about the agency setup, see [Setting Up Agency-Level Options for Permits](#) and [Setting Up Agency-Level Options for Planning Applications](#). For information about working with protected documents in plan reviews, see [Managing Plan Review Documents](#).

Here are the basic steps for conducting electronic plan reviews:

1. Select the option to **Create studio session** on the **New plan review** drawer, while adding a new plan review cycle, or click the **Create Studio Session** action on the Plan Review page for the review cycle you're working with.

2. In the **Reviewers** section, click **Add** to add reviewers.

Reviewers already in the cycle are automatically added to the session. You can also add reviewers during the Studio Session, but you can't delete them. You must add the email addresses for reviewers found in their agency staff profiles to the Bluebeam Studio™ portal before adding the reviewers to the review.

For more information, see [Managing Plan Reviewers](#).

3. In the **Documents** section, click **Add** to add plan review documents.

Documents already in the cycle are automatically added to the session. You can also add or delete documents during the Studio Session.

For more information, see [Managing Plan Review Documents](#).

4. Mark up documents in Bluebeam Studio™.

If you're viewing a marked-up document copied from a previous cycle, Bluebeam Studio™ Sessions allows you to compare prior cycle markups side by side.

When a document is copied back to the review cycle, the state in the Documents grid is *Marked Up*.

5. When all reviewers have provided a decision, the **Finalize Review Cycle** link in the cycle actions menu is available. Click **Finalize Review Cycle** to complete the electronic cycle. For more information, see [Managing Plan Review Cycles](#).

During the finalization process, the marked up documents are copied back from Bluebeam Studio™ Sessions. Documents marked up by reviewers are saved in the plan review documents grid and in the permit attachments; they can be viewed but not edited further. The documents can be copied into the next plan review cycle.

Manually Closing an Electronic Review Cycle

Plan coordinators can use the **Close Cycle** button on the Plan Reviews page to manually close an electronic review cycle when a Studio Session can't be finalized after clicking the **Finalize Review Cycle** button. You can try clicking **Finalize Review Cycle** again in case the connection issues are temporary, but if the error can't be resolved, there may be a document in the Bluebeam Studio™ Session that couldn't be edited. Click **Close Cycle** so that the cycle is considered complete and workflow can advance. You may need to manually retrieve PDF documents that were uploaded to Bluebeam Studio™ Sessions.

The **Cycle Issues** section displays information about documents that the system couldn't copy back to the attachments from Bluebeam Studio™ Sessions. For example, when the system can't retrieve edit-protected documents that were added to a Studio Session, the documents are listed in the cycle issues.

Managing Plan Reviewers

After creating a plan review cycle, you can manually add plan reviewers on the Plan Reviews page for a permit or planning application. Depending on agency configuration, the system can also automatically assign reviewers and add departmental due dates.

For information about manually assigning reviewers in the Plan Reviews console page, see [Using the Plan Review Console](#).

Plan coordinators can assign reviewers to plan reviews but can't be assigned as reviewers. For more information about permissions for working with plan reviewers, see [Setting Up Agency Staff](#) and [Security Details for Managing Plan Reviews](#).

For information about overriding a plan reviewer decision, see [Performing Plan Reviews](#).


Using Automatic Assignment


If **Enable Auto Assignment** is selected in the application type settings, a reviewer row is automatically added to the plan review cycle for each required plan reviewer department selected for the application type. For more information about plan review settings for automatic assignment and required plan reviewer departments, see [Setting Up Permit Types](#) and [Setting Up Planning Application Types](#).

Additionally, the department lead for each department is automatically assigned as the reviewer. For information about defining a department lead, see [Setting Up Plan Reviewer Departments](#).

Using Automatic Department Due Dates

If time rules are associated with required plan reviewer departments in the permit or planning application type definition, departmental due dates are automatically added to the **Reviewers** grid when a plan review is created. You can manually assign reviewers and update the due dates.

An **Overdue** icon appears next to due dates that are past due: 

A **Reviewer Due Date After Cycle Due Date** clock icon appears for reviewer due dates that have been configured to be after the cycle due date: 

For more information about plan review settings for automatically adding due dates, see [Setting Up Plan Review Due Dates](#).

Manually Adding Reviewers to Plan Reviews

When your agency requires plan review departments for the transaction type associated with the transaction, those departments are displayed above the **Reviewers** table on the Plan Reviews page in the application details. When you add a reviewer from a required department to the plan review cycle, that department no longer appears.

You can start an electronic plan review using Bluebeam Studio™ Sessions at any time and the reviewers in the **Reviewers** table are automatically added to the Studio Session. If you add more reviewers while the Studio Session is in progress, they'll be added to the Studio Session, too. For the integration to work, you must add the email addresses for reviewers found in their agency staff profiles to the Bluebeam Studio™ portal before adding the reviewers to the review.

Reviewers are available to add only when they have an application type job attribute that matches the application type of the application. For more information on assigning job attributes, see [Setting Up Agency Staff](#).

1. On the Plan Reviews page in the application details, click the **Add** button.

In addition to the Add Reviewers page that you access from the application's Plan Reviews page in the Redwood Experience, you can add reviewers on three pages in the Plan Review Console in the classic interface: Open Reviews, Unassigned Reviews, and Reviewer Workload. See [Using the Plan Review Console](#).

The **Add reviewers** drawer displays available reviewers by department and district.

Page Element	Description
Reviewer	The reviewer name.
Department	<p>The department assigned to the reviewer.</p> <p>For more information on plan reviewer departments, see Setting Up Plan Reviewer Departments.</p>
District	<p>The district assigned to the reviewer.</p> <p>If the parcel or address for the application is associated with a plan review district, the reviewers that have the matching plan review district job attribute are displayed with the district name. The district is only available if a plan review district is assigned to the application.</p> <p>For more information on plan review districts, see Setting Up District Types, Setting Up Districts, Assigning Districts to Parcels, and Assigning Districts to Addresses.</p>
Department Count	The number of plan reviews currently assigned to the reviewer for that department. This enables a plan coordinator to consider a reviewer's workload when deciding whether to add them to a plan review.

2. Select the checkbox next to each reviewer that you want to add.
3. Click the **Selected (n)** filter button to view only the reviewers that you selected.
4. Click the **View Workload** button to expand the drawer to also show the **Reviewer Total** and the daily number of assigned reviews in a calendar.
5. Click **Assign**.

When the **Reviewers** table refreshes, you'll see the added reviewers with an *In Progress* status.

Note: If you're resubmitting a plan for review, you can elect to copy the original set of reviewers when you add a new plan review cycle. See [Managing Plan Review Cycles](#).

Removing Reviewers from Plan Reviews

As a plan coordinator, you can remove or delete plan reviewers from a plan review cycle on the Plan Reviews page unless an electronic plan review using Bluebeam Studio™ Sessions is in progress.

In the **Reviewers** table, click the **Delete** trash can button for a reviewer. You can remove reviewers when:

- The plan review cycle is active.
- The reviewer's status is *In Progress*.
- You entered an override decision for a reviewer, but the reviewer didn't enter comments or a decision before the override.

You can't delete a reviewer when:

- The reviewer has added comments or entered a decision.
 - A Studio Session is in progress.
- However, you can change the assigned reviewer to another reviewer or manually change the decision to *Not Required* on the Plan Review Decision Details page.

Note: Removing the last plan reviewer who hasn't yet submitted a decision permanently closes the plan review cycle. If desired, you can add a new reviewer before removing the last reviewer, or close the cycle and open a new one.

Changing the Reviewer Assigned to a Plan Review

An agency's plan coordinator can change the reviewer assigned to a plan review on the **Plan review decision details** drawer while the review is still in progress.

1. In the **Reviewers** table on the Plan Reviews page, click the row for the selected plan reviewer.
2. On the **Plan review decision details** drawer, select a name from the **Reviewer** drop-down list. The list displays the available reviewers and a count of plan reviews assigned to each of them.

You can also reassign plan reviews in the Plan Reviews console, which is displayed using the classic user interface:

- Open Reviews page: Expand the cycle row and click the reviewer row to open the Reviewer Details modal page.
- Reviewer Workload page: Expand the reviewer row and click the **Assign** icon for a plan review to open the Reviewer Details modal page.

On the Reviewer Details page, select a name from the Reviewer drop-down list. The list displays the available reviewers and a count of plan reviews assigned to each of them.

Managing Plan Review Documents

Agency staff can add and remove plan review documents on the Plan Reviews page for a permit or planning application. Documents can be added and removed during both manual and electronic cycles. This topic also describes working with protected documents and revised documents provided by applicants.

Adding Documents to a Review Cycle

Documents can be added during both manual and electronic cycles until the cycle is completed, even if some reviewers have provided a decision.

Documents added to a plan review cycle are automatically added to a Bluebeam Studio™ Session that is already in progress. Documents can also be deleted when a Studio Session is in progress. If a document fails to upload to

Bluebeam Studio™ or if the upload status is *No*, you can use the **Retry** button to initiate the upload process again. For more information, see *Working with Electronic Plan Reviews*.

1. On the Plan Reviews page in the application details, select the tab for the review cycle you are working with.
2. In the **Documents** section of the cycle, click the **Add (+)** button.
3. On the **Documents** drawer, select the documents that you want to attach to the plan review cycle. The list displays PDF documents on the application's Attachments page that haven't been added to the plan review yet.

Page Element	Description
File Name	Displays the file name.
Protected	Displays shield icons that indicate whether the document is a PDF file with security settings applied. See the "Working with Protected Documents" section in this topic for more information.
File Size	Displays the file size.
Uploaded By and Uploaded On	Displays who uploaded the file and when it was uploaded to the application's attachments.
Description	Displays the description that was entered when the file was uploaded to the application's attachments.
Category and Subcategory	Displays the category and subcategory that were entered when the file was uploaded to the application's attachments.

4. Click **Save**.

The documents that you selected appear in the **Documents** section.

Page Element	Description
Processing	Displays the progress of files being transferred to or from Bluebeam Studio™ in an electronic plan review cycle. Indicators for each document display which documents have completed the transfer (check mark), which documents are in process (processing icon), and documents with transfer errors (alert icon). Documents that the system couldn't retrieve when the cycle is finalized are listed in the Cycle Issues section on the Plan Reviews page.
File Name	Displays the file name.
Protected	Displays shield icons that indicate whether the document is a protected PDF file. See the "Working with Protected Documents" section in this topic for more information.
Description	Displays the description that was entered when the file was uploaded into the system.

Page Element	Description
State	<p>Displays the state of the document as follows:</p> <ul style="list-style-type: none"> • <i>Initial</i> - Displayed when the document is added to the cycle. • <i>Resubmitted</i> - Displayed when a document with the same name is added to the cycle. Applicants typically upload a revision to the plan review documents after a plan review cycle was rejected or required revisions. Revised documents should be uploaded with the same file name. Once they are added, they are considered <i>Resubmitted</i>. • <i>Marked Up</i> - Displayed when a document that is marked up in Bluebeam Studio™ Session is copied back to the cycle and the Attachments page in the application details. Once the electronic plan review cycle is finalized, the marked up documents in the Documents section can't be edited further.
Date	Displays the date and time when a document was added to the plan review cycle.
Actions	Displays the Delete trash can icon when you have permission to remove the document from the plan review cycle.

Working with Protected Documents




A protected PDF document has any setting that is restrictive or is otherwise secured. There are different ways that your agency can handle protected documents in their Oracle Permitting and Licensing system for permit and planning applications:

- **Protected documents are allowed.** You can upload them to an application form or in the application details but if you add them to an electronic plan review, they're not editable in Bluebeam Studio™ and can't be copied back to the application attachments when the session is finalized. Manual plan reviews can be conducted with protected documents.
- **Protected documents are blocked.** You are prevented from uploading them to an application form or in the application details. If there were protected documents in the system when your agency turned on this option, they can be added to manual and electronic plan reviews but aren't editable in Bluebeam Studio™.
- **Protections are removed.** When you add archive-protected documents to an electronic plan review, the system creates an editable copy without protections for use in the Bluebeam Studio™ Session. Reviewers can mark up the editable version of the document in the session and the system can copy it back to the application attachments. Edit-protected documents can't be marked up in Bluebeam Studio™ and can't be copied back. Manual plan reviews can be conducted with protected documents.

Note: Regardless of the protected documents setting your agency chooses, the system will always prevent you from uploading in an application password-protected documents that require a password to open.

For more information about agency options for setting up protected document handling, see [Setting Up Agency-Level Options for Permits](#) and [Setting Up Agency-Level Options for Planning Applications](#).

Icons help identify protected documents on the Attachments page in application forms and after submittal in the application details. If the agency setup allows protected documents to be uploaded, the system displays a shield icon next to the protected document.

Shield Icons for Protected Documents	Description
	<p>The Edit Protected Document shield icon with check mark and lock is displayed in the attachments on the application intake form and after submittal in the application details when a protected PDF document is uploaded and edit isn't allowed.</p> <p>Protected documents are shown with this icon in the list of plan review documents as well; they can be used in electronic plan reviews but won't be editable or copied back from Bluebeam Studio™.</p> <p>Marked-up documents that are copied back from Bluebeam Studio™ also display this icon, which means that they can't be edited further.</p>
	<p>The Archive Protected Document shield icon with a check mark is displayed in the attachments on the application intake form and after submittal in the application details when a protected PDF document is uploaded.</p> <p>Archive protected documents are not editable in Bluebeam Studio™.</p>
	<p>The Archive Protected or Protected Editable Document shield outline icon indicates an archived PDF document that has protection settings but is editable.</p> <p>Legacy documents that were added before agencies implemented one of the document protection handling options described in this section also display the Archive Protected or Protected Editable Document icon. Depending on the legacy document's protection and the agency's protected document setting, these protected PDF documents won't be copied back unless it's a protection that will allow Bluebeam Studio™ to copy it back.</p>
No shield icon	<p>The Protected column is blank for documents without any protection settings or that have protection settings that are allowed in Bluebeam Studio™, such as print protection.</p>

The **Cycle Issues** section displays information about protected PDF documents that the system couldn't copy back to the attachments during an electronic plan review cycle. For example, when the system can't retrieve edit-protected PDF documents that were added to a Bluebeam Studio™ Session, the documents are listed in the cycle issues.

Working with Revised Documents

Applicants upload revised documents to the Attachments page in their permit or planning applications when requested by agency staff. An **Uploaded Documents** icon indicates that a PDF file has been uploaded to an application with a *Plan Review* status. You'll see the icon on pages in the Plan Review Console as well as on the Attachments page in the application details.

When plan coordinators are waiting for a revised document, they can use the Pending Reviews page in the Plan Review Console to check whether an uploaded document is a revision. For more information, see [Using the Plan Review Console](#).

Here's how to manage a revised plan review document:

1. When the applicant adds a PDF document to the permit or planning application, an **Uploaded Documents** icon appears on the permit or planning application row in the Plan Review Console.
2. Click the icon to open the Uploaded Documents page.
3. You can click the PDF preview icon or thumbnail image to help identify the documents.
4. You can also clear the uploaded documents indicator by clicking **Mark as Seen**, if desired.
5. Click the **Close** icon on the modal page to return to the Pending Reviews page.
6. Click the permit or planning application row to open the application's Plan Reviews page.
7. Create a new cycle and add the revised document to the cycle.

After a revised document is added to a cycle, the **Uploaded Documents** icon is automatically cleared.

Performing Plan Reviews

Plan reviewers perform reviews of documents and enter their decisions. In some cases, the agency's plan coordinator overrides a plan reviewer's existing decision.

As a plan reviewer, you view a list of plans assigned to you on the Task Management page, which is displayed in the classic user interface. This topic describes how you provide your plan review decision and comments on the **Plan review decision details** drawer displayed using the Redwood Experience interface.

The plan coordinator can also enter override decisions, change reviewer due dates, and reassign reviewers on the drawer. A count of assigned plan reviews appears for each available reviewer in the **Reviewer** drop-down list.

This example illustrates the **Plan review decision details** drawer displayed using the Redwood Experience user interface, accessed from the Plan Reviews page in the application details. The override option is only available for agency staff with permissions.

Plan review decision details

Reviewer details

Assigned By sam cook	Status In Progress
Assigned Date 5/7/25 3:43 PM	Last Updated By sam cook
Due Date 5/21/25	Last Updated Date 5/7/25 3:43 PM

Reviewer decision

Reviewer Tom Gray (1)	Decision Date
Decision	

Override Reviewer Decision

☒

Override By	Override Date
Override Decision Approved	

Comments

ORACLE

+

Add Comment

1 item

Reviewers and plan coordinators can provide decisions whether or not documents are identified for a cycle.

Once all reviewers have provided a decision for a review cycle with a Bluebeam Studio™ Session, the plan coordinator finalizes the cycle.

The system derives the overall plan review status from the individual plan reviewer decisions, inclusive of plan coordinator overrides, and updates the overall plan review with the most severe decision status. The system-defined decision statuses from most to least severe are: *Rejected*, *Revision Required*, *Approved with Comments*, *Approved*, and *Not Required*. If plans have one or more rejections, or revisions are required, the plan coordinator may require the applicant to correct the plans and resubmit them for another review cycle.

Viewing Plan Reviews Assigned to You

As a plan reviewer, you can find the plan reviews assigned to you on the Task Management page. The flow described here is displayed using the classic user interface.

1.

Select **Worklist** on the agency springboard.
2.

The My Plan Reviews tab of the Task Management page opens displaying tasks with the *Plan Review* type.

Plan reviews are displayed in ascending order by due date. Plan coordinators enter reviewer-specific due dates on the Plan Review Decision Details page, or by clicking the **Copy Plan Review Cycle Due Date to Plan Reviewers** button on the Plan Reviews page.

You can also use the filter button to filter by additional parameters, including task type, task name, task ID, transaction ID, transaction type, status, assigned to, assigned date, and scheduled date.
3.

Plan review assignments appear in the task grid. Click the **View More Details** button for a transaction to open the Plan Reviews page.

Note: All plan reviews that are assigned to you, including both manual and electronic document reviews, appear on this page.

The plan review workflow tasks for plan coordinators also appear on the Task Management page. Plan coordinators sort tasks by *Workflow*.

For more information on the Task Management page, see *Managing Tasks*.

Adding a Plan Review Decision

As a plan reviewer, you can add your plan review decision on the **Plan review decision details** drawer. You can modify your decision until the plan review cycle is closed or canceled, but you can't modify your decision if the plan coordinator overrides your decision.

The **Plan review decision details** drawer contains all of the information you need to provide a review decision:

Page Element	Description
Assigned By and Assigned Date	Displays the name of the user who made the assignment or system if assigned automatically, and the date when the plan review was assigned.
Due Date	Displays the date the plan review is due. Agency staff with permissions can update the due date.
Status	Indicates the status of the plan review. For example, In Progress.

Page Element	Description
Last Updated By and Last Updated Date	Displays the name of the user who last updated the review decision details and the date when they were last updated.
Reviewer	Select a reviewer from the drop-down list, if the review hasn't been assigned yet.
Decision and Decision Date	<p>Select a reviewer decision from the drop-down list. The decision date is the date when you selected the decision.</p> <p>If your agency is using the system-defined decision statuses, you'll see these options:</p> <ul style="list-style-type: none"> • <i>Approved</i> • <i>Approved with Comments</i> • <i>Revision Required</i> • <i>Rejected</i> • <i>Not Required</i> <p>The decision status names in the Decision list may not match the system status names, because displayed statuses can be modified by the agency for permit and planning application plan reviews. For example, if the agency changes the displayed status of <i>Rejected</i> for a permit plan review, you might see <i>Declined</i> or <i>Failed</i>. However, the severity of the decision remains the same. Any displayed status associated with the system status <i>Rejected</i>, for example, is always calculated as the most severe status.</p> <p>For more information about agency setup for displaying separate permit and planning application decision statuses, see Setting Up Plan Review Statuses.</p>
Override Reviewer Decision and Override Decision	<p>Plan review coordinators and agency staff with permissions can turn on the switch to select an override the reviewer decision. Once the reviewer's decision has been overridden, they can't update it anymore. The Override By field shows the name of the user who provided the override decision, and the date appears as well.</p> <p>Note: If the plan coordinator overrides the last review in the plan review cycle, the override action changes the status of the plan review cycle to complete.</p>
Comments	<p>Enter review comments.</p> <p>Comments are optional unless your agency elects to require comments during plan review setup. Your agency may require comments for decisions with a negative or qualified outcome (<i>Approved with Comments</i>, <i>Rejected</i>, or <i>Revision Required</i>) or all decisions.</p> <p>Comments marked as private are only visible to agency staff with permissions; applicants and contacts with application access can only see public comments. Comments can't be updated once the plan review cycle or transaction is closed or canceled.</p> <p>For more information, see Working with Comments.</p>

Here's how to add a reviewer decision:

1. On the Plan Reviews page in the application details, select the tab for the review cycle you are working with.

2. In the **Reviewers** section of the cycle, select a reviewer row.
The **Plan review decision details** drawer opens.
3. On the drawer, select a value from the **Decision** list.
4. Click **Add Comments** to enter comments for your review.
5. Click the **Save** button.
The system updates the **Decision Date** field with a timestamp.

Overriding Plan Reviewer Decisions

An agency's plan coordinator can override a plan reviewer's existing decision but can't change decisions. When a plan coordinator overrides a decision, the decision status and timestamp appear in the **Reviewers** grid in the reviewer's row. Once the reviewer's decision has been overridden, they can't update it anymore.

As a plan coordinator, you can override the individual plan reviewer's decision on the **Plan review decision details** drawer.

1. On the Plan Reviews page in the application details, select the tab for the review cycle you are working with.
2. In the **Reviewers** section of the cycle, select a reviewer row.
The **Plan review decision details** drawer opens.
3. On the drawer, turn on the switch to **Override Reviewer Decision**.
4. Select a value from the **Override Decision** drop-down list.
5. Click **Add Comments** to enter comments for your review.
6. Click the **Save** button.
The system updates the plan reviewer's **Decision Date** timestamp and enters Yes in the **Override** field.

Note: If the plan coordinator overrides the last review in the plan review cycle, the override action changes the status of the plan review cycle to complete.

Managing Plan Review Comments

Comments can be added and are sometimes required when providing plan review decisions or at the review cycle level. Plan coordinators and plan reviewers can also update and delete their own cycle-level and reviewer-level comments.

Your agency may require comments for review cycle cancellations and decisions with a negative or qualified outcome (*Approved with Comments*, *Rejected*, or *Revision Required*) or all decisions and cancellations. Comments are optional unless the agency elects to require comments.

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

Here's how you can manage plan review comments.

Working with Review Cycle Comments

Plan coordinators and plan reviewers can add comments for each review cycle.

On the Plan Reviews page in the application details, scroll down to the **Comments** section. All of the comments entered for the review cycle you are viewing appear in the table. Click the **Add Comment** button to add a cycle comment.

Plan coordinators and plan reviewers can update and delete their own cycle-level comments. Click the comment row to open the **Comment details** drawer. Update comments and save or click **Delete**. System administrators can update and delete comments added by others. You can add, update, or delete cycle-level comments for plan reviews in any cycle status until the application is closed.

Agency staff can mark comments as public or private when they add comments, but comments designated as **Private** are only visible to agency users with permissions. Applicants and contacts with application access can see the comments marked as **Public**. Applicants can't see plan reviewer names.

Working with Reviewer Comments

Plan reviewers can add decision comments to their own plan reviews. Plan coordinators and system administrators can add decision comments for plan reviews assigned to any reviewer:

On the Plan Reviews page, select a review cycle and click a reviewer row in the **Reviewers** section of the cycle to open the **Plan review decision details** drawer. In the **Comments** section on the drawer, agency staff with permissions can enter comments for the review or override decision. For more information about working with reviewer decisions, see *Performing Plan Reviews*.

Click the **Add Comment** button to enter a new comment. Plan coordinators and plan reviewers can also update and delete their own reviewer-level comments. Click the comment row on the decision drawer to open the **Comment details** drawer. Update comments and save or click **Delete**. System administrators can update and delete comments added by others. You can't update or delete comments once the plan review cycle or transaction is closed or canceled.

Viewing All Plan Review Comments

On the Plan Reviews page in the application details, click the **View Plan Comments** button to open the list of comments.

Plan coordinators and plan reviewers can view consolidated comments from the plan review cycles and review decisions on the **Plan comments** drawer.

Plan comments

×

Q Search

5 items

Sort By ▾

⬇

Review Cycle 2 • Tom Gray • Fire Protection

Override for plan reviewer out of the office.

6/10/25 12:02 PM • Last updated by Tammy Bowles • Private

Review Cycle 2

Final electrical plans were updated as requested.

5/7/25 4:04 PM • Last updated by sam cook • Public

Review Cycle 2 • Thomas Anders • Utilities

Final electrical plans were updated as requested.

5/7/25 4:01 PM • Last updated by sam cook • Public

Review Cycle 1 • Electrical

electrical revision needed

2/19/25 2:01 PM • Last updated by sam cook • Public

Review Cycle 1 • Utilities

revision needed

The drawer displays the comments entered for an application's plan review by all participants during each review cycle. The comments listed on this page can be searched, sorted, and downloaded.

Applicants and contacts with application access can see the comments marked as **Public**, but comments marked as **Private** are only visible to agency staff with permissions. Applicants can't see plan reviewer names.

10 Managing Projects

Security Details for Managing Projects

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Projects Inquiry	View public sector projects.	All users including users without login
PSC Project Management	Manage projects to which the user is assigned as the project manager.	PSC System Administrator PSC Registered Public User PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer
PSC Project Administration	Manage all projects.	PSC Planning and Zoning Application Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Chief Building Officer PSC Building Inspector PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permits Application Administrator PSC Permit Technician
PSC View Public Sector Project Attachments	View public sector project attachments.	PSC System Administrator PSC Registered Public User PSC Principal Planner

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Planning Coordinator PSC Plan Reviewer
PSC Update Public Sector Project Attachments added by Others and Self	Update public sector project attachments added by others and themselves.	PSC System Administrator
PSC Update Public Sector Project Attachments added by Self	Update public sector project attachments added by themselves.	PSC System Administrator PSC Registered Public User PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer
PSC Delete Public Sector Project Attachments added by Others and Self	Delete public sector project attachments added by others and themselves.	PSC System Administrator
PSC Delete Public Sector Project Attachments added by Self	Delete public sector project attachments added by themselves.	PSC System Administrator PSC Registered Public User PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer
PSC Delete Public Sector Project Attachments added by Others and Self	Delete public sector project attachments added by others and themselves.	PSC System Administrator
PSC Add Public Sector Project Attachments	Add public sector project attachments.	PSC System Administrator PSC Registered Public User PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer

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

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

Using Projects

This topic discusses how to use the Oracle Permitting and Licensing Projects.

A Project is a collection of various records from transactions, which include permits, planning applications, and preapplications. It provides a summarized, consolidated view across project-related records.

Agency staff create and manage such inventory of projects comprising of various records and their attributes, and maintain detailed project information – all easily accessible from one location – the Projects page.

You use the Projects page to manage a complete list of projects with all the details, and perform various tasks.

This example illustrates the Projects page:

Projects

Project	Summary	Contact	Status	Start Date	End Date
Pro-2018-00522 AAA-2018	AAA Constructions present a all new corporate office building on the Sunvale Highway - the hub for IT companies. The offices are enabled with state-of-the art equipment, allowing new offices to just plug and play their systems.	SIMMONS Robert +1 (751) 852-9632	Completed	10-21-15	>
Pro-2018-04462 Pro2469	Connuivre Builders are coming up with villas in a 250 acre plot consisting of 2 lakes and a breath-taking view of the meadows. The 40 odd villas with an expanse of landscape are supported by a community that has been living in the area for over two decades.	Robert M Jacob +1 (751) 852-9562	On Hold	10-04-17	11-20-19 >
PROI-OCT2018-4 John Tumac	Harbor Rocks transformed an old plot into a vibrant residential community one block from the Oakland Estuary and Bay Trail. The 81-unit building features landscaped grounds and water views near Fruitmingle BART, an organic grocery, and local cafes and coffee shops.	ALBERT MICHAEL SIMMONS +1 (951) 852-9632	Inactive	09-05-17	11-01-19 >

Page 1 of 3 (1-3 of 18 items) < 1 2 3 > X Show Default

Use the project list on the Projects page to perform these tasks:


- Manage project activity
- Create new or update existing project details
- Assign or unassign transactions
- Add and maintain project attachments
- Visualize transactional data
- Add and maintain project contacts
- Access comprehensive project record details

You can access the Projects page by clicking the **Project List** tile on the Agency Springboard, or by clicking **Projects > Project List** in the navigation bar.

Using the Projects Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, you can perform these actions:

Page Elements	Description
Add	Click to add a new project, assign transactions, and create contacts.
Search	Search by alphanumeric characters on the fields for projects in the list. The projects that meet the search criteria are displayed on the page.

Page Elements	Description
Filter	Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.
Sort by	Select an option to sort the projects in the list by these fields: <ul style="list-style-type: none">○ Project○ Project Summary○ Contact○ Status○ Start Date○ End Date
	Click the Details button to access the details for the selected project.

Adding a New Project

As an agency staff, you can create new projects to include transactions and contacts.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Add** button.
3. On the Project Details page, add values for the fields in the Projects section:

Page Elements	Description
Project ID	Displays the system generated project ID after you save the project.
Name	Enter the name of the project.
Summary	Enter a detailed description of the project.
Type	Select the type of project from the list of options.
Status	Select the status of the project: <ul style="list-style-type: none">○ Active○ Canceled

Page Elements	Description
	<ul style="list-style-type: none"> ○ On Hold ○ Inactive ○ Completed
Estimated Valuation	Enter an estimated amount for the project.
Start Date	Enter the start date for the project.
End Date	Enter the end date of the project.
Primary Contact	<p>Click the prompt to open the Look Up page, which lists all the registered contacts. You can search for your desired contact using the Search option.</p> <p>Select the desired contact and use the Select Contact Type option to select the type of contact.</p>

4. In the **Primary Address** section, click the prompt to open the Search Property page.
5. Use the Search box to filter the parcel, address, or owner values by keyword. Select the record you want by clicking the **Select** button. The Search Property page closes and the selected address appears on the Project Details page.
6. Click **Save** to save the new project and return to the Projects page. The new project record now appears in the projects list.

Assigning Transactions to a Project

As an agency staff, you assign transactions to a project that you have created. You use the Assign page to assign transactions to your project. Transactions include permits, planning applications, and preapplications.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button on the project record that you want to assign transactions to.
3. On the Project Detail page, click **Transactions** on the left panel.
4. On the Transactions page, click the **Assign** button.
5. The Assign page opens with a list of all transactions available in the system. Use the **Search** option to search transactions by applicant, transaction ID, or by an address that is associated with the transaction.
6. The **Filter** allows you to refine your search results further using the transaction applicant's name and an address that is associated with the transaction..
7. Select the transactions using the checkbox available against each transaction record.
8. Click the **Assign** button to assign the selected transactions and return to the Transactions page, which lists the new transaction assignments.

Note: As a project manager, you can assign transactions to your project. The **Assign** page lists only those permits, planning applications, and preapplications that were applied by you. The system ensures that project managers can assign only those transactions that were created by them. See the documentation on Security.

Unassigning Transactions from a Project

As an agency staff, you can unassign transactions from a project that you have created. You use the Transactions page to unassign transactions from your project.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button on the project record from which you want to unassign transactions.
3. On the Project Detail page, click **Transactions** on the left panel.
4. On the Transactions page click the **Edit** button, which enables you to select transaction records to unassign.
5. Use the checkbox available against each transaction record that you want to unassign and then click the **Unassign** button.

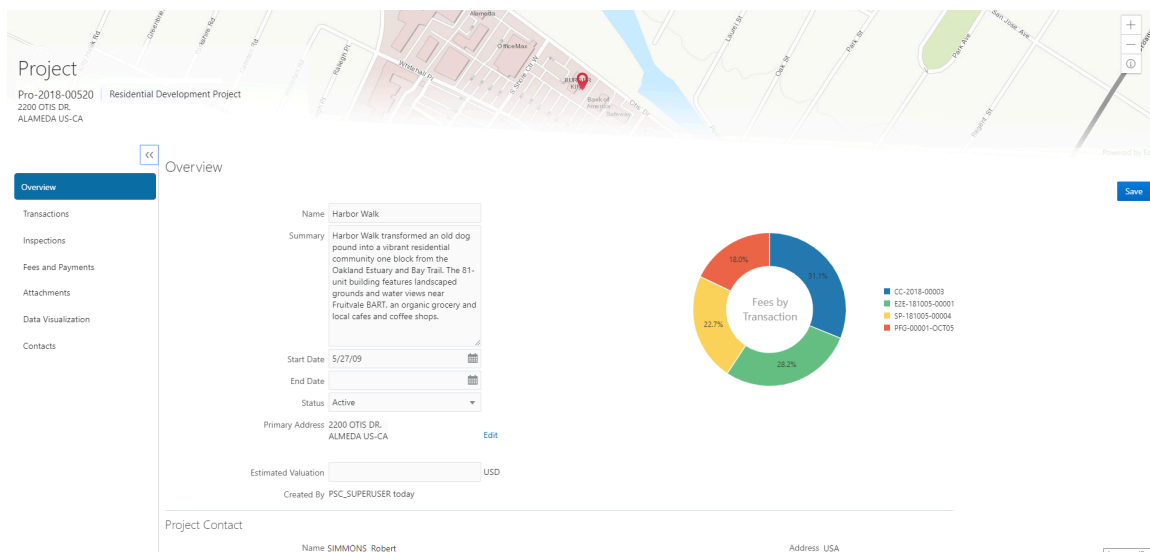
Viewing and Updating Project Details

You view and manage projects comprising of transaction assignments, project attachments, and project contacts on the Project Details page.

The header displays the project code, project type description, and the project primary address. A map marker displays the primary location of the selected project on the map.

The left panel lists the various links to the project detail pages – Overview, Transactions, Inspections, Fees and Payments, Attachments, Data Visualization, and Contacts. Clicking each link opens the detail view on the right panel.

This example illustrates the Project Details page:



Using the Overview Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. The Overview page displays the information about the selected project in three sections – Overview, Primary Contact, and Fees and Payments.

4. The Overview section lists the basic information about the project. You can edit values for all the fields except for the **Project ID** and the **Created By** fields, which are system generated. The field descriptions are detailed under *Adding a New Project*.
 - o A graphical chart displays the top five transactions and their percentage fees distribution, calculated using the transaction total fees from all the assignments for the project. *Others* accounts to the fees from the rest of the transactions assigned to the project.
 - o The Primary Contact section displays the details of the contact that was entered at the time of creating the project. You cannot edit the values for these fields on this page.
- Note:** You can change the primary contact from the Contacts page.
- o The Fees and Payments section displays:

Page Elements	Description
Total Fees	The sum of all the fee values from all the transactions assigned to the project.
Total Payable	The sum of the payable amounts from all the transactions assigned to the project.
Total Paid	The sum of the amounts paid for all the transactions assigned to the project.
Balance Due	<p>The sum of the amounts that is due for all the transactions assigned to the project.</p> <p>Note: Balance amount is the difference between the total payable amount and the total paid amount.</p>


The fields in this section are displayed if there is at least one assignment (permit, planning application, or preapplication) for the project. You cannot edit the values for these fields on this page.

5. Click **Save** to save your changes, if any.

Using the Transactions Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Transactions** on the left panel to access the list of transactions that are assigned to the project. The Transactions page provides these details:


Page Elements	Description
Edit	Click to enable the selection of transactions for removing them from the project. See Unassigning Transactions from a Project under <i>Adding a New Project</i> .

Page Elements	Description
Assign	Click to open the Assign page and select transactions to assign to the project. See Assigning Transactions under <i>Adding a New Project</i> .
Filter	Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.
Sort	Sort the list of transactions by: <ul style="list-style-type: none"> ○ Date ○ Transaction ID ○ Status
Alert icon	Identify transactions with a status affected by a condition or if they are pending submit.
Transaction	Displays the name and description of the transaction.
Status	Displays the status of the transaction.
Created By	Displays the name of the user who created the transaction, with the date and time of creation.
Applicant	Displays the name, email ID, and contact number of the applicant associated to the transaction.
Property	Displays the address of the property for which the transaction is applied.
Fees	Displays the total fees paid and the balance due, if any.
	Click to access the Transaction page and view the details of the transaction assigned the project. All sections on this page are display-only. See <i>Navigating to Planning Application Details</i> .

Using the Inspections Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.


- Click **Inspections** on the left panel to access the list of permit inspections that are assigned to the project. The Inspections page provides these details:

Page Elements	Description
Permit	Displays the permit ID.
Inspection	Displays the inspection ID.
Status	Displays the schedule status of the inspection, for example, Scheduled, Requested, Completed, and Canceled.
Inspector	Displays the inspector assigned to the inspection.
Property	Displays the property associated with the inspection.
Result	Displays the result of the inspection, Pass or Fail.
	Click to access the Inspection Detail page and review the details of the inspection assigned the project. All sections on this page are display-only. See Reviewing Inspection Details .

Using the Fees and Payments Page

- Select the **Project List** tile on the Agency Springboard.
- On the Projects page, select the **Details** button for a project in the grid. Click Fees and Payments on the left panel to access the details of the fees and payments associated with a submitted transaction. The Fees and Payments page provides these details:

Page Elements	Description
Total Fees	Displays the total amount of fees that may be applicable to the transaction.
Total Payable	Displays the amount of fees that is designated as payable. Fees that are not payable include fees on hole, for example.
Total paid	Displays the amount of the total fees already collected.
Balance Due	Displays the remaining portion of the fees yet to be collected.
Transaction	Displays the transaction ID.

Page Elements	Description
Fee Description	Displays the description of the fee item as defined when creating a fee item.
Amount	Displays the amount due for each fee item.
Currency	Displays the currency in which the transaction will be paid.
Status	Displays the status of the fees and payment transaction, for example Canceled, Pending, Hold, and Due.
Assessed Date	Displays the date the request for payment was issued.
Payment Date	Displays the date payment was received.
Payment Reference	Displays the payment reference issued for the transaction.
Invoice	Displays the invoice number of the agency associated with the permit transaction application.
	Click to access the Fee Item Details page and review the details of the fees.
Viewing Deposit Accounts	Click to open the Deposit Accounts page and view a list of all deposit accounts associated with the project.

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

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

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

Using the Attachments Page

Attachments provide supporting documentation needed by users while managing projects. You view a list of files and upload or download documents associated with your project on the Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Attachments** on the left panel to access the attachments associated with the project. The Attachments page provides these details:

Page Elements	Description
File Name	View the following information in the Filename field: <ul style="list-style-type: none"> ○ Filename with file type extension ○ File Size ○ Uploaded By user name ○ Uploaded On date
Description	View the description of the attachment as entered by the user who added the attachment.
Category/ Subcategory	View the document category and subcategory for the attachment. This field appears only if a document group is set up on the Project Type Details page while setting up the project type. See Setting Up Project Types .
Actions	Click the actions icon to select and perform an action: <ul style="list-style-type: none"> ○ View Details ○ Download ○ Delete

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

Adding Project Attachments

You upload files to the Attachments page using the Add Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. Click the **Add** icon.
5. Select the file to upload in the browser dialog box and click **Open**. The filename appears on the Add Attachments page.

6. On the Add Attachments page, you can enter a description of the file, a document category, and a document subcategory, if desired.
7. Use the look-up prompt to select a document category and subcategory that have been defined by the agency. For more information, see *Setting Up Document Categories and Subcategories*.
8. Click the **Upload** button.

Downloading Project Attachments

You download a document on the Attachments page.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. In the attachments grid, click the **Action** icon for the document you want to download.
5. Select **Download** and save to the location of your choice.

Deleting Project Attachments

You can use this method for deleting one or more documents.

1. Select the **Project List** tile on the Agency Springboard.
2. Click the row for a project to access the detail.
3. Click the **Attachments** link to view the Attachments page for the project.
4. Click the **Edit** icon above the grid.
5. Select one or more documents to delete.
6. Click the **Delete** icon.
7. To delete a single document, access the Attachments page, and select **Delete** in the Action menu for the document you want to delete.

Using the Data Visualization Page

1. Select the **Project List** tile on the Agency Springboard.
2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Data Visualization** on the left panel to access graphical charts that display the comparative data related to transactions within the selected project. These graphical charts are organized in three separate tabs, with a grid each displaying a list of all the transactions within the project:
 - **Fees by Transaction Type:** The chart displays all the project transactions represented as bars – each bar grouping transactions by the transaction type, along with the total amount of fees applicable. Click a bar to list all the transactions for that transaction type with their details at the bottom of the page.
 - **Fee Details:** The chart displays all the project transactions represented as bars. Each transaction is displayed as a combination of two bars – one bar reads the total amount of all applicable fees and the other reads the total amount of all fees paid. Click a bar to list all the transactional fee item details at the bottom of the page.
 - **Inspection Status:** The pie chart displays the inspection status of each of the permits assigned to the project. Click a section of the chart to view the details of the inspections pertaining to the permits at the bottom of the page.

Using the Contacts Page

1. Select the **Project List** tile on the Agency Springboard.

2. On the Projects page, select the **Details** button for a project in the grid.
3. Click **Contacts** on the left panel to access the list of contacts that are added to the project. You will see the primary contact that was added at the time of creating the project.
4. Click the **Details** button for the contact record to open the Contact Details page. You can view the contact details and edit certain fields.

Note: You cannot delete a primary contact or turn off the **Primary Flag** option. Only agency staff such as an administrator can select from the registered profiles to assign a primary contact. Such an assignment will automatically update the earlier primary contact as not primary.

5. Click **Save** to save your changes to the Contact Details page and return to the Contacts page.
6. Click **Add New Contact** to access the Contact details page. You can:
 - *Add a contact from registered contacts:* You just select a contact from a list of contacts that are already registered in the system and include in the project. Click **Select** on the row to open the Select Contact Type page and select a contact.

As a user, you cannot make primary contact assignments for your project. Only agency staff such as an administrator can assign a primary contact from the registered profiles.

The primary contact that was selected at the time of creating the project will no longer be a primary contact.

- *Add a brand new contact manually:* You create a new contact by entering all the contact details and then include in the transaction.

Again, as a user, you cannot make primary contact assignments for your project.

11 Tracking Planning Application Activities

Security Details for Tracking Planning Application Activities

This topic describes important security roles, requirements, or considerations specific to tracking planning application activities.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Planning and Zoning Inquiry	View activity logs for all planning applications.	PSC Agency Staff - All agency users
PSC Planning and Zoning Activity Management	Act and comment on planning activities assigned to themselves.	PSC Planning Assistant PSC Associate Planner PSC Principal Planner
PSC Planning and Zoning Activity Administration	Update and comment on all planning activities.	PSC System Administrator PSC Zoning Administrator

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

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

Overview of Activity Tracking for Planning Applications

As planning department staff, you use activity tracking to help work through a list of time-sensitive tasks that affect the progress of a planning application.

The activities are driven by local ordinance, state law, and an agency's internal process, and the activity tracking provides a way to monitor the application. Taken together, the activities form a to-do list of tasks with calculated due dates and the flexibility to make updates when needed. Activities are displayed on the Activity Tracking page in the planning application details. You can also view activities on the Planner Worklist. For more information about using the worklist, see [Using the Planner Worklist](#).

The activities for a planning application are configured by your agency based on events or dates in the application timeline, including when the application is submitted, when the application is accepted, the hearing date, and the hearing decision date. The activities show up in the activity tracking for the planning application when one of the key

events or dates occurs. For more information about configuring activities, see [Defining Planning Application Activity Rules](#).

Before you can use activity tracking, the agency sets up a list of activities and maps the group to a planning application type. Whenever you create an application with that planning application type, the associated activity list is used.

The activity due dates can occur prior to or after an event. For example, when the planner schedules a hearing, the activities associated with the hearing date appear in the activity tracking list. You'll see automatically generated due dates based on the activity rules set up by your agency and ensure that all of the deliverables are complete before or after the hearing.

For more information about how to use Activity tracking to manage important due dates for the planning application process, see [Working with Planning Application Activities](#).

Viewing the Activity Tracking Page

For each activity, the following information appears in the tracking list. Navigate to the Activity Tracking page by accessing the planning application, then select **Activity Tracking** under the **Planning Application** menu in the left panel on the page. The activity tracking tab is only available if the planning application is associated with an activity group.

Page Element	Description
Add	<p>Assigned planners can add ad hoc activities and set their own due dates on the Activity Tracking tab and the Planner Worklist.</p> <p>Agency staff with elevated access can update the activity status on the Activity Tracking tab and the Planner Worklist, but they cannot add an activity on the Planner Worklist.</p> <p>If an activity is added by mistake, simply set the status to Canceled.</p> <p>For more information about creating a custom role to grant elevated access to the planning staff, see Creating Custom Roles for Oracle Permitting and Licensing.</p>
Activity	<p>Displays the name of the activity or task. This field is read-only and can't be updated.</p> <p>If the task is overdue, you'll see an overdue notice.</p>
Base Date	<p>Displays one of four milestone dates triggered by an event. The base date is the reference date for calculating the activity due date.</p> <ul style="list-style-type: none"> Received date - The application was received by agency staff. The activity appears on the tracking page when the application is submitted in the system or the received date is updated, depending on the activity rule. Acceptance date - The agency staff accepts the application in their worklist. This date is automatically updated through workflow. Hearing date - The agency staff schedules or reschedules a public hearing for the planning application. Hearing Decision date - The hearing body makes a decision and agency staff enters the decision in the system. None - Use this when adding ad hoc activities. Ad hoc activities do not have any due date calculations. <p>When these events occur, the activity is added to the tracking list.</p>

Page Element	Description
	These dates can change and the due dates may be recalculated depending on the activity rules and the status of the activity.
Due Date	Displays the date the activity or task is due. This date is calculated using the base date and the activity rule for number of days due before or after the base date. This field can be manually updated.
Status	Displays the status of the activity or task. This field can be manually updated
Show All Statuses	Turn on the Show All Statuses switch to view a complete list of activities in the tracking table. The default view shows activities with an in progress or pending status. When you opt to show all statuses, you'll see history with other statuses, including complete or canceled activities.
Last Updated	Displays the date when the due date or status was last updated. This field can be manually updated.
Updated By	Displays the name of the user who last updated the due date or status. This field is automatically updated.
Comments	Click the Comments icon to view and add internal notes for each activity. The number of comments appears on the icon. The comments also show up on planning application items in the agency staff activity worklist.
Actions	Displays <i>Resubmit</i> when the activity with a Submission Date base date has an incomplete status. Agency staff can then create a new activity with a resubmitted date. This action appears only when the Allow Resubmission option is selected in the activity rules.

Working with Planning Application Activities

Activity tracking helps you effectively manage important due dates for deliverables due during the planning application process. You can monitor activities when due dates are updated automatically and make manual updates to due dates and statuses to ensure the application progresses as required.

In some cases, activity due dates are updated automatically, such as when a received date is updated or a public hearing is rescheduled. As you work through the tracking list, you can also manually update the due date and the status of activities, and enter the date of the update. In general, you can't add activities, however depending on the setup, you can create a new activity for a resubmitted application. If an application is canceled or withdrawn, all activities are canceled.

Viewing Automatically Updated Activities

The system automatically updates activity due dates depending on the type of base date, the current activity status, and the activity rules configured by the agency. This section provides details about the automatic updates that occur after different actions are taken, such as updating the received date for an application or rescheduling a public hearing.

Agency staff enter the date an application was received while filling out the intake form on behalf of an applicant. The activity based on the Received Date appears in the tracking table upon application submission. When agency staff updates the Received Date on the application details Overview page, the activity due date is automatically recalculated based on the new received date. However, the due date is recalculated only when the option to **Allow Resubmission** is set up for the activity.

Activities based on the hearing date appear in the tracking table when the hearing is scheduled. The agency can set up the activity rules to create a new activity or update an existing one when the public hearing is rescheduled or the hearing body is changed. The rule is active when the switch to **Redo Activity with New Base Date** is turned on. The system determines the updates based on the redo activity setting, the action, and the activity status.

The table here shows the automatic activity updates for different actions when the base date is the public hearing date.

Action	Current Activity Status	Redo Activity Setting	Automatic Tracking Update
Hearing is rescheduled.	Pending, In Progress, or Not Required	On	Recalculates the due date for the current activity based on the new hearing date and resets the status to Pending.
Hearing is rescheduled.	Pending, In Progress, or Not Required	Off	The due date stays as-is.
Hearing is rescheduled.	Completed	On	Creates a new activity with a new base date and due date. Sets the status to Pending. The completed activity stays as is.
Hearing is rescheduled.	Canceled	N/A	No changes are made to the base date or due date. The canceled activity stays as-is.
Hearing body is changed.	Any	N/A	Deletes all current activities with the old hearing body and creates all new activities with new hearing body. Sets the status to Pending.
Hearing is canceled.	Any except for Canceled	N/A	Cancels all activities.

Manually Adding Activities

Click the **Add** button to manually add an activity. You can use the search to find activities by activity name or activity ID on the drawer. Filter buttons show **Active** or **All** activities.

Click the activity row to update the base date, due date, and status, then click **Save** to add the activity to the list on the Activity Tracking page.

Manually Updating Due Dates and Statuses

Although you can't manually delete or modify system-added activities and their base dates, you can manually update the activity due date, activity status, and the date the activity was last updated. If an activity isn't required, you can update the status to Not Required or Canceled.

Click filter buttons the activities to show **Active** or **All** activities. You can also export the activities by clicking the **Export** button.

Let's take a look at how to update these activity attributes for a planning application.

1. Go to the planning application.
2. Under the expanded **Progress** menu section in the left navigation panel in the application details, click the **Activity Tracking** menu link.
3. On the Activity Tracking list page, select the row of the activity you want to update.
4. Here are the fields on the activity drawer. The drawer title reflects the activity name.

Page Element	Description
Base Date	Displays the date against which the due dates are calculated.
Due Date	Enter the date that the deliverable is due or the deadline for the action that should be taken.
Status	Select a status from the drop-down list. Your agency may provide statuses in addition to the statuses in the system.
Last Updated	Enter the date when you updated the activity.
Add Comment	Click the button to open the page where you can add comments or select system comments to add to the activity. For more information, see Working with Comments .

5. Click **Save**.

Repeating an Activity for a Resubmitted Application

The Received Date activity that appears when the application is submitted can be repeated when the application is resubmitted. The **Allow Resubmission** switch must be turned on in the activity rule. Here's how to reset the activity due date with a pending status if the application is resubmitted.

1. On the Activity Tracking page, select the row of the activity based on the submission date.
2. Change the status to *Incomplete*. This status is only available if the **Allow Resubmission** switch is turned on in the activity setup.
3. Click **Save**.
4. Click the **Resubmit** link, which is only available when the status is *Incomplete*.
5. On the Resubmit page, the **Resubmitted Date** is automatically populated with the current date, and the **New Due Date** is calculated using the existing activity rule. You can change the **Resubmitted Date** and the due date will be recalculated. You can also override the due date.

6. Click **Save**.

The activity status resets to *Pending*.

12 Managing Property Information

Security Details for Managing Property Information

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Manage Parcel Transactions	Manage public sector parcel transactions.	PSC System Administrator PSC Business Analyst

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

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

Viewing the Parcel Page

View summary information of parcels.

Agency staff uses the Parcel page to view a summary of information related to a parcel, such as the parcel number, address, primary owner and the status of the parcel.

You can use the **Parcel** tile on the agency springboard to navigate to the Parcel page. Click a parcel row to view its details.

Page Element	Description
Parcel Number	The unique identifier of the parcel. This is also known as the assessor's parcel number (APN) for the parcel.
Primary Address	The primary address of the parcel.
Primary Owner	The name of the primary owner of the parcel.
Land Value and Improvement Value	The land value and improvement value of the parcel.

Page Element	Description
Zoning Code	The zoning code of the address of the parcel.
Status	The current status of the parcel. Values are: <ul style="list-style-type: none"> • <i>Active</i> • <i>Retired</i> • <i>Provisional</i>
Enabled	Turn on the Enabled switch to make the parcel available as a lookup value on other pages.

Updating Parcel Information

View and update all information related to a parcel.

Agency staff can view and update details of a parcel, such as the parcel type, status, property description. Sections are available for information on land use, building, location and map details.

You can navigate to the Parcel Details page, from the **Parcel** tile on the agency springboard. On the Parcel page, click the parcel row to manage its details.

Note: A condition icon is displayed on the parcel row if a parcel has a condition applied to it. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied. Click a condition row to open the Parcel Conditions page in a new window.

Page Name	Description
Parcel Details	View and update details about the parcel such as the parcel type, status and property description. See Updating Parcel Details section later in this topic. For details on setting up parcels, see Setting Up Parcels .
Parcel Address	View and update addresses associated with a parcel. See Updating Parcel Address Details section later in this topic. For details on setting up addresses, see Setting Up Property Addresses .
Parcel Owner	View and update information about parcel owners on the Parcel Owner page. See Updating Parcel Owner Details section later in this topic. For details on setting up owners, see Setting Up Property Owners .
Parcel District	View and update parcel district assignments on the Parcel District page. See section later in this topic .

Page Name	Description
	For details on assigning districts to parcels, see Assigning Districts to Parcels .
Transactions	View summary information of all transactions associated with a parcel. For details, see Viewing Transactions Associated with a Parcel or Property Address .
Attachments	Attachments provide supporting documentation needed by agency staff to manage parcels. For details, see Working with Property Attachments .
Comments	Agency staff can view, modify, and add comments on the Comments page for a parcel. For details, see Working with Comments .
Conditions	Agency staff can apply conditions to parcels so that users interacting with a property are notified of any issues with it. For details, see Applying Conditions to Parcels and Addresses .
Genealogy	Agency staff can create parcel genealogy transactions to manage parcel splits, merges and lot line adjustments, and attribute management. For details, see Working with Parcel Genealogy Transactions .
Parcel Value	View and update parcel values on the Parcel Value page. For details, see Setting Up Parcel Values .

Updating Parcel Details

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click a row to view and update the parcel details.

Page Element	Description
Parcel Type	The type of parcel.
Status	The status of the parcel, which can be either <i>Active</i> , <i>Retired</i> or <i>Provisional</i> .
Enabled	Turn on this switch to make the row available as a lookup value on other pages.
Property Description	The property description of the parcel.
Effective Start Date	The date on which the parcel becomes valid.
Land Value	The land value of the parcel.
Improvement Value	The improvement value of the parcel.

Page Element	Description
Net Assessed Value	The net assessed value of the parcel.

3. In the Land Use section of the Parcel Details page, view and update details about the land associated with the parcel using the following fields:
- *Zoning Code*
 - *Zoning Code 2*
 - *Zoning Description*
 - *General Plan*
 - *General Plan 2*
 - *Tax Rate Area*
 - *Parcel Size 1*
 - *Parcel Size 1 UOM*
 - *Parcel Size 2*
 - *Parcel Size 2 UOM*
 - *Boundary Description*
 - *Jurisdiction*
 - *Census Tract*
 - *Census Block*
 - *Subdivision*
 - *Climate Zone*
 - *Flood Zone*
 - *Flood Insurance Rate Map*
 - *Liquefaction Risk*
 - *Fire Risk*
 - *Landslide Risk*
 - *Soil Type*

4. In the Building section of the Parcel Details page, view and update details about the building associated with the parcel using the following fields:
 - *Year Built*
 - *Structure Size 1*
 - *Structure Size 1 UOM*
 - *Structure Size 2*
 - *Structure Size 2 UOM*
 - *Number of Dwelling Units*
 - *Bedrooms*
 - *Bathrooms*
 - *Pool*
 - *Patio*
 - *Additional Structure*
5. In the Location and Map Information section of the Parcel Details page, view and update the mapping and location details for the parcel using the following fields:
 - *Map Name*
 - *Book Number*
 - *Map Book Page*
 - *Block Number*
 - *Lot Number*
 - *Section Number*
 - *Latitude*
 - *Longitude*
 - *X Coordinate*
 - *Y Coordinate*
6. Click Save.

Updating Parcel Address Details

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its details.
3. On the Parcel page for the chosen parcel, select the **Parcel Address** tab in the left navigation panel.

Page Element	Description
Street Number	The street number of the parcel address.
Street Name	The street name of the parcel address.

Page Element	Description
Street Suffix	The street suffix that further describes that street like Drive, Avenue, and so on.
Direction Prefix	The street direction of the parcel address.
Unit	The unit number of the parcel address.
City	The city of the parcel address.
Postal Code	The postal code of the parcel address.
Primary	Indicates whether the parcel address is marked as primary for that parcel.

4. Click **View More Details** to access the Address Details page to make updates.

Page Element	Description
Enabled switch	Turn on this switch to make the row available as a lookup value on other pages.
Address Details	<p>Turn on the Primary switch to indicate the address as the primary address for the parcel.</p> <p>View the parcel number with this address and the line one of the address.</p>
Building and Location Information	<p>View and update details, such as:</p> <ul style="list-style-type: none"> ○ Street Number, Name and Suffix ○ Address Type ○ Direction details like latitude, longitude, and X, Y Coordinates. ○ Landmark, Crossroad ○ Unit, Floor ○ City, State, Postal Code
Contact Information	<p>View and update details, such as:</p> <ul style="list-style-type: none"> ○ Name ○ Email Address ○ Phone numbers (home, work, cell) ○ Fax

5. The Address Details page has tabs in the left navigation panel to access the following pages:
 - Parcel page, see [Viewing the Parcel Page](#).
 - Transactions, see [Viewing Transactions Associated with a Parcel or Property Address](#).
 - Attachments, see [Working with Property Attachments](#).
 - Conditions, see [Setting Up Conditions](#).
6. Click Save.

Updating Parcel Owner Details

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its details.
3. On the Parcel page for the chosen parcel, select the **Parcel Owner** tab in the left panel.

Page Element	Description
Owner	The name of the parcel owner.
Primary	The name of the primary parcel owner.
Address	The parcel owner's address.

4. Click **View More Details** to access the Owner Details page.

Page Element	Description
Owner Details	View and update the owner's name and type.
Enabled switch	Turn on this switch to make the row available as a lookup value on other pages.
Primary	Use the Primary switch to indicate if the specified owner is a primary owner or a secondary owner.
Owner	The name of the primary parcel owner.
Secondary Owner	The name of the secondary parcel owner.
Owner Type	The type of parcel owner, such as <i>Personal</i> or <i>Town</i> .
Owner Address	View and update the country, postal code and address of the owner.

Page Element	Description
Contact Information	View and update the contact information for the owner, such as email address, fax, phone numbers (home, work, cell, etc.)
Transfer Information	In the Transfer Information section of the Owner Details page, view the transfer details for the parcel owner.
Last Transfer Type	The last transfer type of the parcel owner.
Document Number	The document number of the parcel owner.

- The Owner Details page has tabs in the left navigation panel to access the following pages:
 - Parcel, see [Viewing the Parcel Page](#).
 - Attachments, see [Working with Application Attachments](#).
- Click Save.

Viewing Parcel District Details

- Select the **Parcel** tile on the Agency Springboard.
- On the Parcel page, click the parcel row to view its details.
- On the Parcel page for the chosen parcel, select the **Parcel District** tab in the left panel.

Page Element	Description
District and Description	Displays the unique identifier for the district and its description.
District Type	Displays the unique identifier for the district type.
District Type Category	Displays the category for the district type. The system-defined values include: <ul style="list-style-type: none"> <i>Code Enforcement</i> <i>Council</i> <i>Economic Development</i> <i>Zoning</i> <i>Inspection</i> <i>Plan review</i> <i>General</i>

4. Click **View More Details** to access the Parcel District Details page.

Note: You cannot update the district details for a parcel from the Parcel District Details page. In order to change the district-related information for a parcel, use the **Delete** button on the Parcel District Details page to remove the district from the parcel. You can then add a new parcel district row from the Parcel District page. For details, see *Assigning Districts to Parcels*.

Related Topics

- [Using Grids](#)

Viewing Transactions Associated with a Parcel

View summary information of all transactions associated with a parcel or property address.

Agency staff can view a summary of transactions for Permits, Planning Applications, Business Licenses, Cases and Incidents, that are associated with a parcel or property address.

You can navigate to the Transactions page from:

- The **Parcel** tile on the agency springboard. On the Parcel page, click the parcel row to view its transactions.
- The **Property Address** tile on the agency springboard. On the Address page, click the address row to view its transactions.

Note: A condition icon is displayed on a row if a parcel or property address has a condition applied to it. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied. Click a condition row to open the Condition Details page in a new window.

The Parcel page has tabs in the left navigation panel to access the following pages:

- Parcel Address, Parcel Owner, Parcel District pages, see *Updating Parcel Information*.
- Transactions, see details in this topic.
- Attachments, see *Working with Property Attachments*.
- Conditions, see *Setting Up Conditions*.
- Genealogy, see *Working with Parcel Genealogy Transactions*.
- Parcel Value, see *Setting Up Parcel Values*.

The Address page has tabs in the left navigation panel to access the following pages:

- Parcel page, see *Viewing the Parcel Page* and *Updating Parcel Information*.
- Transactions, see details in this topic.
- Attachments, see *Working with Property Attachments*.
- Conditions, see *Setting Up Conditions*.

On the Parcel or Address page for the selected row, select the Transactions tab in the left panel. On the Transactions page, click the transaction tab you wish to view for the parcel or address.

Page Element	Description	Additional Information
Business Licenses	Agency staff can view summary information about business licenses that are associated with a parcel or property address.	<i>Viewing Business Licenses Associated with a Parcel or Property Address</i>
Cases	Agency staff can view a summary of cases that are associated with a parcel or property address.	<i>Viewing Cases Associated with a Parcel or Property Address</i>
Incidents	Agency staff can view a summary of incidents that are associated with a parcel or property address.	<i>Viewing Incidents Associated with a Parcel or Property Address</i>
Permits	Agency staff can view application data and statuses for permits using the transactions page. You can also perform actions, such as paying fees and accessing detailed application information from here.	<i>Managing Transactions</i>
Planning Applications	Agency staff can view application data and statuses for planning applications using the transactions page. You can also perform actions, such as paying fees and accessing detailed application information from here.	<i>Managing Transactions</i>

Viewing Business Licenses Associated with a Parcel or Property Address

Agency staff can view a summary of business licenses that are associated with a parcel or property address on the Transactions page, Business Licenses tab.

1. Select the **Parcel** or **Property Address** tile on the Agency Springboard.
2. On the Parcel or Address page, click a row to view its transactions.
3. On the Parcel or Address page, select the Transactions tab in the left panel.
4. On the Transactions page, click the Business Licenses tab.
5. Here are some of the information on the Business Licenses Transactions page for a parcel or property address.

6.

Page Element	Description
License	Displays summary information about the license.
Doing Business As	Displays the name by which the business is conducted, also known as DBA.
Property	Displays the address associated with the location of the business.
Description	Displays the business description.

Page Element	Description
Additional Information	Displays information related to the business license application, such as the name of the user who created the application, the date on which the application was created, and the name of the applicant.
Fees	Displays the total fees for the transaction activity, and the balance due if the total has not been paid.

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

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

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

Viewing Cases Associated with a Parcel or Property Address

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

- Select the **Parcel** or **Property Address** tile on the Agency Springboard.
- On the Parcel or Address page, click a row to view its transactions.
- On the Parcel or Address page, select the Transactions tab in the left panel.
- On the Transactions page, click the Cases tab.
- Here are some of the information on the case transactions page for a parcel or property address.

Page Element	Description
Case	This column displays: <ul style="list-style-type: none"> The case ID that is assigned based on the agency's autonumbering rules. 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, Compliance, Violation, Citation, and so on.
Comply By	Displays the last date to ensure compliance.

6. Click a row to access the case overview page.

Viewing Incidents Associated with a Parcel or Property Address

Agency staff can view a summary of incidents that are associated with a parcel or property address on the Transactions page, Incidents tab.

1. Select the **Parcel** or **Property Address** tile on the Agency Springboard.
2. On the Parcel or Address page, click a row to view its transactions.
3. On the Parcel or Address page, select the Transactions tab in the left panel.
4. On the Transactions page, click the Incidents tab.
5. Here are some of the information on the incidents transactions page for a parcel or Address page.

Page Element	Description
Issue ID	<p>This column displays:</p> <ul style="list-style-type: none"> ○ The incident ID that is assigned based on the agency's autonumbering rules. ○ The incident type and subtype, separated by a hyphen. ○ The incident status. Unclaimed incidents have a status of Reported. ○ The date on which the incident was reported.
Location	<p>Displays the incident address and the incident's district type and district.</p> <p>If district information is missing, a warning icon appears in its place.</p>
Description	Displays the incident description.
Assigned	Displays the name of the technician or code officer to whom the incident is assigned.

7. Click a row to access the incident overview page.

Working with Property Attachments

Attachments provide supporting documentation needed by agency staff to manage parcels. You view a list of files and upload or download documents on the property information Attachments page.

Viewing Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.

Note: You can also access these pages through the Property Information menu in the Navigator.
2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.

4. On the Attachments page, view the list of property attachments, including this information:

Page Element	Description
Filename and Description	View the filename and description entered by the user upon upload.
File Size	View the size of the attachment.
Category and Subcategory	View the document category and subcategory for the attachment.
Actions	Click to select an action: <ul style="list-style-type: none">○ <i>View Details</i>: Select to view detailed information about the attachment.○ <i>Download</i>: Select to download the attachment.○ <i>Delete</i>: Select to delete the attachment. You will be prompted to confirm the permanent deletion.

Adding Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
Note: You can also access these pages through the Property Information menu in the Navigator.
 2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
 3. Click **Attachments** in the navigation bar.
 4. Click **Add**.
 5. Select the file to upload in the browser dialog box and click **Open**.
The filename appears on the Add Attachments page.
 6. On the Add Attachments page, enter a description of the file, a document category, and a document subcategory.
Note: The description, document category, and document subcategory fields are optional and can be left blank.
- For more information on document categories and subcategories, see [Setting Up Document Categories and Subcategories](#).
7. Click the **Upload** button.

Deleting Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
Note: You can also access these pages through the Property Information menu in the Navigator.
2. Click the **Details** button to access the details for a parcel, parcel address, or parcel owner.
3. Click **Attachments** in the navigation bar.
4. Click **Edit**.

5. Select the checkboxes next to all the attachments that you want to delete.
6. Click **Delete**. You will be prompted to confirm the permanent deletion.

Note: You can delete a single attachment on the Attachments page by selecting **Delete** in the **Actions** menu.

Applying Conditions to Parcels and Addresses

Agency staff can apply conditions to parcels and addresses so that users interacting with a property are notified of any issues with it.




Agency staff apply, modify, and resolve parcel and address conditions on the Conditions page. The Conditions page lists all of the conditions applied to the selected property, with applied conditions followed by resolved conditions. The condition indicator in the header of the details pages displays the most severe condition having a high priority. Click the **All Conditions** link next to the icon to open a modal window that displays all active conditions applied along with their severity, applied date, and display message.

Note: Deleting a parcel or address record in the property information automatically deletes any associated conditions that are applied to the permit or planning application you are working with. See the section *Deleting a Property* under *Working with Property Information*.

Applying a Condition to a Parcel or Address

1. Click **Parcel** or **Property Address** on the agency springboard.
Select a property.
Click **Conditions** in the left panel.
2. Click **Apply Condition**.
3. On the Condition Details page, enter values for the following fields:

Page Element	Description
Condition Name	<p>Use the lookup prompt to search and select the condition that you want to apply. The search page lists all the available conditions along with their severity, display message, and description.</p> <p>After you select a condition, the condition information is brought in as it was defined in the condition setup. You can override the default rules, priority, description, and additional information to customize the condition.</p> <p>For more information on conditions, see <i>Setting Up Property Conditions</i>.</p>
Display Message	Displays the message associated with the selected condition. This message is entered by your agency administrator in the setup page and cannot be updated here.
Severity	Displays the level of severity defined for the selected condition.

Page Element	Description
 Lock  Hold  Notice	<ul style="list-style-type: none"> ○ <i>Lock</i>: This severity suspends all operations and selects all condition rules for the condition. ○ <i>Hold</i>: This severity enables agency staff to select the condition rules that apply to the condition. ○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.
Apply Condition to Transactions	<p>Applies the condition to new transactions that will be associated with the selected address or parcel. You turn off the switch if you want the condition to be applied only to the transaction you're working with.</p> <p>The condition setup determines whether this switch is turned off or on by default.</p>
Include in-process transactions	<p>Turn on this switch if you want to apply the condition to the in-process transactions related to the parcel or address.</p> <p>This option appears only if the Apply Condition to Transactions switch is turned on.</p> <p>You can click the View Impacted Transactions link to view the list of transactions where the condition will be applied.</p>
Condition Rules	<p>Select one or more rules from:</p> <ul style="list-style-type: none"> ○ Prevent Application Progress ○ Prevent Workflow Advancement ○ Prevent Issue or Final ○ Prevent Payment ○ Prevent Inspection Schedule ○ Prevent Inspection Result ○ Prevent Final Inspection <p>Condition rules are available for selection based on:</p> <ul style="list-style-type: none"> ○ <i>Condition setup</i>: If the Apply Condition to Transactions switch is turned off, then only the Prevent Application Progress rule is available for selection. ○ <i>Condition severity</i>: For a condition with a Hold severity, you can accept the default rules or select different rules. For a condition with a Lock severity, all condition rules are automatically applied and can't be changed.
Priority	Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .
Description	Displays the description entered by your agency administrator in the condition setup page, but you can update the text here.

Page Element	Description
Additional Information	Displays additional information entered by your agency administrator in the condition setup page, but you can enter new information here.
Allow Updates by Parcel Import switch	<p>When the parcel import option is selected to resolve the parcel or address condition, the process will resolve the condition only if the Allow updates by parcel import switch is turned on.</p> <p>This field displays whether the switch was enabled on the Condition Setup page.</p>
Applied By	Displays the name of the user or system that applied the condition with the date.

For more information, see [Setting Up Conditions](#).

4. Click **Save**.

Resolving a Condition

You can resolve a condition that you applied to a parcel or address.

1. Click **Parcel** or **Property Address** on the agency springboard.
Select a property.
Click **Conditions** in the left panel.
2. Click **Resolve** for the condition you want to resolve.
3. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field. The **Resolve conditions applied to transactions** switch is turned on by default, which resolves the condition that was initially applied automatically to the transactions when this condition was created.
You turn off the switch if you want to resolve this condition alone, without affecting the transactions associated with the parcel or address.
4. Use the **View Impacted Transactions** link to access a page that lists all impacted transactions within the selected parcel or associated with the selected address.
5. Click **Save**.

Modifying a Condition

You can modify a condition that you applied to a parcel or property address. Any changes you make won't be copied over to the related transaction condition.

1. Click **Parcel** or **Property Address** on the Agency Springboard.
Select a property.
Click Conditions in the navigation bar.
2. Click the View More Details button for the condition you want to modify.
3. On the Condition Details page you can update the rules, priority, description, and additional information for a condition with a Hold severity. For conditions with a Lock or Notice severity, you can update the priority, description, and additional information.

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

4. Click **Save**.

CAUTION: Once a condition is saved, you can't make changes to the **Apply Condition to Transactions** and **Include in-process transactions** fields.

Viewing a Resolved Condition

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

1. Click **Parcel** or **Property Address** on the Agency Springboard.
2. Select a property.
3. Click **Conditions** in the navigation bar.
4. Select a row with a status of **Resolved** and click **View More Details**.
5. The Conditions Details page opens to display the details of the condition at the top, followed by an additional information about its resolution:
 - Resolve condition applied to transactions
 - Resolution Action
 - Resolved By
 - Resolved Date
6. Click **Cancel** to return to the Conditions page.

Working with Parcel Genealogy Transactions

Agency staff can create parcel genealogy transactions to manage parcel splits, merges and lot line adjustments, and attribute management.

Agency staff can create Parcel Genealogy transactions to manage parcel splits, merges and lot line adjustments. You can use the step-by-step guide to select a genealogy transaction type and establish parent and child parcels. You can also manage attributes, such as addresses, owners, size and districts. Once a parcel genealogy transaction is established, you can view the relationship in the Genealogy tab within the Parcel page.

Splitting Parcels

To split parcels:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Split** and then click **Add Transaction**.
3. On the Split page, you have a guided process with steps as follows:

Steps	Description
Step 1: Select Parent Parcels	You can select parcels from the list, which have to be split.

Steps	Description
Step 2: Select Child Parcels	You can either select child parcels that are already on the system or create new child parcels.
Step 3: Manage Addresses Step 4: Manage Owners Step 5: Manage Districts Step 6: Manage Conditions Step 7: Manage Parcel Size	When you create new child parcels, you can enter the parcel attributes such as addresses, owners, districts, conditions and parcel sizes. When you select child parcels that are already on the system, you will be able to view the parcel attributes but not modify them.
Step 8: Review	You can review the parcel details of the resultant parcels. Validation errors, if any, are displayed at the top of this page.

Merging Parcels

To merge parcels:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Merge** and then click **Add Transaction**.
3. On the Merge page, you have a guided process with steps as follows:

Steps	Description
Step 1: Select Parent Parcels	You can select the parent parcels to be merged from the list.
Step 2: Select Child Parcels	You can either select child parcels that are already on the system or create new child parcels.
Step 3: Manage Addresses Step 4: Manage Owners Step 5: Manage Districts Step 6: Manage Conditions Step 7: Manage Parcel Size	When you create new child parcels, you can enter the parcel attributes, such as addresses, owners, districts, conditions and parcel sizes. When you select child parcels that are already on the system, you will be able to view the parcel attributes but not modify them.
Step 8: Review	You can review the parcel details of the resultant parcels. Validation errors, if any, are displayed at the top of this page.

4. Click **Submit**.

Making Lot Line Adjustments

To make lot line adjustments:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Adjust** and then click **Add Transaction**.
3. On the Adjust page, you have a guided process with steps as follows:

Steps	Description
Step 1: Select Parcels	You can select parcels from the list to make adjustments.
Step 2: Manage Parcel Size	Adjust the parcel sizes.
Step 3: Review	You can review the details of the adjustment made. Validation errors, if any, are displayed at the top of this page.

4. Click Submit.

Viewing Parcel Genealogy Transactions

To view parcel genealogy transactions:

1. Select the Parcel tile on the Agency Springboard.
2. From the Parcel page, click a parcel row.
3. Select the Genealogy tab in the left panel. You can view the details of all the genealogy transactions this parcel has been through. The red star identifies the parcel which is currently being viewed. Click any parent or child parcel link to open the corresponding Parcel Details page in a new window.

Reconciling Provisional Parcels

Agency staff can now easily reconcile provisional parcels by replacing the temporary parcel identification numbers with a new one. Once reconciled, a cross-reference is established to retain history.

New parcels with the provisional status can be created on the Parcel page or as a result of genealogy transactions. The agency uses the provisional parcel numbers to associate transactions to those parcels while waiting for the assessor's parcel numbers (APNs) from the county. Once APNs are imported, agency staff can search for matched or unmatched parcels in the provisional status and reconcile them with their matching APNs. After the provisional parcels are reconciled, a cross-reference is established to retain history.

Note: The batch process to match provisional parcels should be run prior to performing parcel reconciliation to ensure all provisional parcels have been matched to their associated imported APNs. The BI Catalog report, Transactions with Reconciled Provisional Parcels, lists the transactions that refer to the reconciled provisional parcels. Using this report you can see the provisional parcels that have been replaced with final parcels as a result of parcel reconciliation. For more information, see [Permitting and Licensing Analytics](#).

To reconcile matched provisional parcels:

1. Select the Parcel Reconciliation tile on the Agency Springboard.
2. On the Provisional Parcel Reconciliation page, select the Matched Parcels tab, to view the following fields:

Page Element	Description
Parcel	Lists the provisional parcels with any potential matching APNs. Matching APNs are parcels with the same street number and street name.
Status	The status of the parcel. The value can be Active, Retired or Provisional.
Address	The primary address of the parcel.
City	The city of the primary parcel address.
Owner	The name of the primary parcel owner.
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.
Reconcile Parcels button	Select the provisional parcel and the matching APN, and then click the Reconcile button to match the provisional parcel with the matching APN and retire the provisional parcel.

3. Click the **Find Matching Parcel** button on a parcel row to open the **Find Matching Parcel** modal which lists a matching APN.
4. In the Find Matching Parcel modal, view the following fields:

Page Element	Description
Search	By default, the search field shows the street number and street name of the primary address of the matched provisional parcel. The search results below appear filtered to list only those matching the search criteria.
Parcel	The APNs of the parcels that resulted from the search.

Page Element	Description
Status	The status of the parcel. The value can be Active, Retired or Provisional.
Address	The primary address of the parcel.
Owner	The name of the primary owner of the parcel.
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.
Lot	The lot number of the parcel in the Detail Land Information, which is part of the APN.

5. Select the checkbox for the matching APN and click the **Reconcile** button.

After reconciliation, the provisional and matched APNs move to the Reconciliation History tab, from where you can see the history of the reconciled parcels.

To reconcile unmatched provisional parcels:

1. Select the Parcel Reconciliation tile on the Agency Springboard.
2. On the Provisional Parcel Reconciliation page, click the Unmatched Parcels tab, to view the following fields:

Page Element	Description
Search	You can search for a provisional parcel using its primary address.
Provisional Number	The temporary parcel number assigned to newly created provisional parcels. Click the link to view the details of the parcel in a new window.
Creation Date	The date on which the provisional parcel was created.
Status	The status of the parcel. The value can be Active, Retired or Provisional.
Address	The primary address of the parcel.
Owner	The name of the primary parcel owner.
Map Book	The recorded map book for the parcel.

Page Element	Description
Page	The recorded map book page for the parcel.
Lot	The lot number of the parcel in the Detail Land Information, which is part of the APN.

- Click the **Find Matching Parcel** button on an unmatched parcel row to search for a matching APN.
- In the Find Matching Parcel modal, view the following fields:

Page Element	Description
Search	By default, the search field shows the street number and street name of the primary address of the unmatched provisional parcel. The search results below appear filtered to list only those matching the search criteria.
Parcel	The APNs of the parcels that resulted from the search.
Status	The status of the parcel. The value can be Active, Retired or Provisional.
Address	The primary address of the parcel.
Owner	The name of the primary owner of the parcel.
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.
Lot	The lot number of the parcel in the Detail Land Information, which is part of the APN.

- Select the checkbox for the matching APN and click the **Reconcile** button.

Viewing Reconciliation History

In the Reconciliation History page, you can view the details of the provisional parcels reconciled with their APNs. You can also use this page to undo a reconciliation.

To view reconciliation history:

- Select the Parcel Reconciliation tile on the Agency Springboard.

- Click the Reconciliation History tab to view the following fields:

Page Element	Description
Search	By default, the search field shows the street number and street name of the primary address of the unmatched provisional parcel. The search results below appears filtered to list only those matching the search criteria.
Provisional Number	View the provisional number of the parcel. Click the link to view the details of the parcel in a new window.
APN	View the APN of the parcel. Click the link to view the details of the parcel in a new window.
Address	The primary address of the parcel.
Owner	The name of the primary owner of the parcel.
Map Book	The recorded map book for the parcel.
Page	The recorded map book page for the parcel.
Lot	The lot number of the parcel in the Detail Land Information, which is part of the APN.
Reconciled By	The user id of the person who reconciled the parcels.
Date Reconciled	The date on which the provisional parcel was reconciled with its APN.
Undo Reconciliation button	To disassociate parcels which were incorrectly reconciled.

Undoing a Reconciliation

To undo a reconciliation:

- Select Parcel Reconciliation on the Agency Springboard.
- Click the **Reconciliation History** tab.
- Click the **Undo Reconciliation** button and confirm to revert the reconciliation.

13 Managing Contractor Information

Security Details for Managing Contractor Information

This topic describes important security roles, requirements, or considerations specific to managing contractor information for permits, planning applications, business license applications, and contractors.

Permit applications

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Manage contractors in permits for which an applicant or a contact has access until the permit is closed.	PSC Registered Public User
PSC Agency Permits Inquiry	View contractor information on permit applications.	PSC Agency Staff - All Agency users
PSC Permit Contractor Management	Add and update contractor information on permit applications until they are closed.	PSC Business Analyst PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Permits Management with Elevated Access	Delete sections of contractor information on permit applications.	PSC Permits Supervisor PSC System Administrator
PSC System Administrator	Manage contractor information on permits at all times.	PSC System Administrator

Planning applications

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Manage contractors in planning applications for which an applicant or a contact has access until the planning application is closed.	PSC Registered Public User

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Planning and Zoning Inquiry	View contractor information on planning applications.	PSC Agency Staff - All Agency users
PSC Planning and Zoning Contractor Management	Add and update contractor information on planning applications until they are closed.	PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Business Analyst PSC Principal Planner
PSC Planning Application Management with Elevated Access	Delete sections of contractor information on planning applications	PSC Zoning Administrator PSC System Administrator
PSC System Administrator	Manage Contractor information on planning applications at all times	PSC System Administrator

Business license applications

Security Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Manage contractors in pending business license applications for which an applicant has access until the application is submitted. View contractors after the application is submitted.	PSC Registered Public User
PSC Contact User	View contractors in business license applications for which a contact has access after the application is submitted.	PSC Contact User
PSC Agency Business License Inquiry	View contractor information on business license applications.	PSC Agency Staff - All Agency users
PSC Business License Specialist	Manage contractor information on business license applications until they are closed.	PSC Business License Specialist
PSC Business License Manager	Manage contractor information on business license applications until they are closed.	PSC Business License Manager
PSC Business License Business Analyst	Manage contractor information on business license applications until they are closed.	PSC Business Analyst

Security Role	Access Description	Associated Job Roles and Abstract Roles
PSC Business License Application Administrator	Manage contractor information on business license applications at all times.	PSC System Administrator

Contractors

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Contractor Master Inquiry	View contractor records	PSC Agency Staff - All Agency users
PSC Contractor Master Administration	Administer main contractor records.	PSC System Administrator
PSC Contractor Master Management	Manage main contractor data.	PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Business Analyst PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician PSC Business License Manager PSC Business License Specialist

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

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

Contractor License Overview

Business license, permit, and planning applications can include information about the contractors who perform the necessary work. Agency contractor records help you manage contractors used in the system to ensure licenses are active and in good standing.

Contractor License Information

Contractor information is stored and maintained in the agency's contractor records, where agency staff manually adds or loads licenses from an external source. Additionally, when agencies don't limit license selection to their list of contractor records and also integrate with an external licensing body, applicants can supply contractor information in permit and planning applications. If an application includes a license number that doesn't yet exist in your main records, submitting the application creates a new contractor record.

If you implement contractor integration, you can validate license information against your state or other external licensing body using the integration capabilities of Oracle Integration Cloud (OIC). The validation process replaces the existing contractor license with the matching license from the external licensing body using these key fields: license setup code, license number, and license type. In addition, the validation process uses the classification code for matching classifications; bond policy number for matching contractor bonds or other bonds; and insurance type, policy number, and exempt fields for matching insurances. When there is an exact match with the key fields in the system, the external licensing body's data replaces the data in the agency contractor record. Otherwise, a new record is created. Any records not matching the data from the external source will be retained. Agencies must manually evaluate and remove nonmatching records that aren't needed.

Note: The external integration may not provide a license type for the contractor licenses. The **License Type** field is part of the key on the contractor license record and must have a value. Oracle recommends setting up the **License Type** field with a value such as *LICENSE* for use when retrieving and loading licenses from integrations with an external licensing body. If no license type value is assigned by the licensing body, the system can use the *LICENSE* value in the **License Type** field on the contractor license record.

Regardless of whether you integrate with an external licensing body, your contractor records include the same type of information. However, integration affects how you view and manage certain information. The following table describes how you manage information using only contractor records maintained by the agency or using an integration to validate and add licenses to your contractor records.

Information Type	Contractor List Only	Contractor List and External Source
All	<p>Note: The agency limits the contractor selection to the agency-maintained contractor list.</p> <p>The agency allows applicants to select contractor licenses from the agency-maintained contractor records list only. In this case, applicants can search for and select licenses from the contractor records only and not from the external licensing body.</p>	<p>Note: The agency doesn't limit the contractor selection to the agency's contractor list.</p> <p>The agency allows applicants to select contractor licenses from the contractor records list or an integrated external source. The validation process checks your contractor records first, and if you don't yet have a record of the license, the process retrieves information from the licensing body.</p>

Information Type	Contractor List Only	Contractor List and External Source
	<p>Agency staff with appropriate permissions manually enter or update license information in the contractor list. Contractor records can also be loaded from an external source, but license selection in the application is still limited to licenses in the list.</p> <p>Applicants who are contractors or their authorized agents can search for and select their license to retrieve information from the contractor list, but can't manually enter their license information.</p> <p>Applicants who are not contractors or authorized agents, such as homeowners, can optionally search for and select licenses to retrieve information from the contractor records about the license and contractor. The same is true for agency staff who are applying on behalf of this type of applicant.</p> <p>The agency may also restrict access to contractor licenses to authorized contacts only. In that case, you must be an authorized contact to search for and select contractor licenses from the agency-maintained contractor list for use on transactions.</p> <p>You can search for a contractor by license number, license type, business name, or owner name to retrieve license information.</p>	<p>Agency staff and applicants perform a real-time license number validation that retrieves license details from the licensing body. For most users, the license detail fields are read-only, and re-validation is the only way to update the information. However, system administrators are able to modify contractor information.</p> <p>Applicants who enter a license number in an application can use the same validation process.</p> <p>Applicants who self-identify as contractors or the contractor's authorized agents must select at least one license number.</p> <p>Other applicants can search for and select a license to retrieve license details, but they can also leave the contractor license blank. They can't manually enter data.</p> <p>You can search for a contractor by license number, license type, business name, or owner name to retrieve license information.</p>
License status	<p>Agency staff uses the <i>Status</i> field to indicate if a license is active, suspended, expired, and so forth.</p> <p>Note: The license status is independent of contractor approval. For example, a license can have an active status but is disabled for use because it isn't approved. Licenses must be enabled to be entered in an application.</p> <p>Applicants can see the internal status if they bring details from your contractor records into an application. They can't modify the status.</p>	<p>The license validation process retrieves a <i>source status</i> from the external licensing body. This status is read-only for all users, and can only be updated by re-validating the license number.</p> <p>Your status mapping settings assign a default agency status based on the source status. Agency staff can update the internal status.</p> <p>Your status mapping settings also specify if specific source statuses will prevent applicants from submitting applications. If the application is declined due to the source status, the applicant sees a message explaining that the application can't be submitted. Note that the expiration date is checked regardless of status validation. If the license is expired, the application is declined regardless of the status.</p>
License type	<p>When integration is not enabled, the agency must create a license type for contractor licenses. Set up the license type in the contractor license options.</p> <p>Applicants must select this value as the license type when they enter contractor license information in an application.</p>	<p>License types must be set up for the contractor licenses.</p> <p>External licensing bodies may not provide a license type for the contractor licenses, but the License Type field is part of the key on the contractor license record and must have a value. Oracle recommends setting up the License Type field with a value such as <i>LICENSE</i> for use when retrieving and loading</p>

Information Type	Contractor List Only	Contractor List and External Source
	Oracle recommends creating a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.	<p>licenses from integrations with an external licensing body. If no license type value is assigned by the licensing body, the system can use the <i>LICENSE</i> value in the License Type field on the contractor license record.</p> <p>Use license classifications to track the specific types of work that a contractor is licensed to perform.</p>

Adding Licenses to an Application Form

Whether you're a homeowner, contractor, a contractor's authorized agent, or agency staff, you select a contractor license associated with the project while filling out the form for a business license, permit, or planning application. You also identify a contact person for the license.

Your agency may limit your license selection in the application to their own list of approved contractors, regardless of an integration with an external source. In this case, the contractor list is the source of truth and only agency-approved contractors can be entered in the application. Your agency can further limit the contractors displayed in the list to authorized contacts of a contractor license. You can search for a contractor by license number, license type, business name, or owner name to retrieve license information when adding a contractor license.

When your agency doesn't limit your license selection to their list of contractors, and the system integrates with an external licensing body, the process still initially checks the data in the agency's list of contractors. You must have the exact license number to retrieve license information from the external source.

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

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

If configured by your agency, the system sends an email notification to contacts on the intake form upon application submission as well as to new contacts when they are added to the application after submission.

When public users review details for submitted applications, they can see the contractor information. As with all other information in a submitted application, the contractor information is read-only for public users.

Applying as a Contractor or Authorized Agent

Contractors or authorized agents can submit an application for a business license, permit, or planning application. A contractor's authorized agent, such as an employee or contractor associated with the contracting business, can submit applications on behalf of a contractor. The applicant can self-identify as a contractor or authorized agent in the Contractor field group in an application form. When entering the contractor information, you select *Contractor* or

Authorized Agent as the applicant role. If you don't self-identify as a contractor or authorized agent, this option doesn't appear, and the applicant role is *Applicant*.

Information about self-identified agents is saved to the associated contractor license details. Newly identified agents are saved with a status that shows that verification is pending. Agency staff can review the information, update the verification status, and indicate whether the authorized agent is a contractor operating under the contractor license.

If an applicant self-identifies as a contractor or authorized agent, then the applicant must select a contractor license. If integration is active and license selection isn't limited to the contractor list, the applicant can find the contractor using the exact license number.

The contractor information fields are populated by the process of validating a license number and only a system administrator can manually update them. The system creates a new contractor record in the agency's contractor list if there isn't already a record for the specified license number, and the applicant's contact information is automatically added to the Contacts page in the contractor license details.

Agency staff updating contractor information in the submitted application details can also identify the applicant as a contractor or authorized agent for the selected license.

Submitting an Application with License Alerts

If your agency has applied one or more conditions to the contractor license, you'll see an icon for the most severe condition when you add a contractor license. You can select the license but depending on the condition rules, you may not be able to submit the application until the condition is resolved. Click the **Condition Applied** icon to see a list of the conditions, including the condition name, severity, description, and the date when the condition was applied.

Agencies also sometimes add extra validations when you add contractors to make sure that contractor licenses meet application requirements. For example, the license requirements for a permit can include a specific license type, classifications, job cost, and insurance attributes. Validations can also check the license expiration date. Depending on the validation setup, you may not be able to submit the application if requirements aren't met unless you are agency staff with a contractor management role.

When you select a contractor to add to an application with license validations, the system displays an alert listing the contractor's missing requirements. Once you've added 1 or more contractors to the application, you'll see an alert that lists the combined validations for the application. The addition of another contractor can satisfy the application-level validation requirements. For example, if a permit requires at least 1 contractor to be a General Contractor, the requirement is satisfied when a General Contractor is added, regardless of the classifications of other licenses.

The Contractor page in the application or transaction details displays the same missing attributes for contractors added during application intake and after submittal.

For more information about contractor license validations, see [Setting Up Validation Groups](#).

Adding License Contacts

When applicants add the contractor license to the intake form from the agency's contractor records, they select a contact person from the list of verified contractors associated with the license. When the applicant selects **Done** for the license information in the intake form, the selected contact person also appears in the **Contacts** section of the form.

You can select multiple contacts for the license. For each contact, you must choose the contact type. The available contacts are people associated with the contractor license on the Contacts page in the contractor record details. The contact initially has a level of business license, permit, or planning application access based on the agency setup for the **Contact Type** that you select. The applicant can upgrade the application access level of contacts in the **Contacts** section of the form or after submission in the transaction details. When adding a contractor license contact to a

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

When the application is submitted, the applicant who self-identifies as a contractor or authorized agent is added to the list of contacts for the license in the agency's list of approved contractor. The contractor is only available to select as a contact on application forms after the contractor details are verified on the contractor license details page.

Agency staff can also manually add contractors and authorized agents to the contractor license details on the Contacts page. Only system administrators can remove contacts from a contractor record. For more information, see [Adding Contractor License Contacts](#).

For information about managing the contacts associated with a business application, permit, or planning application, see [Working with Application Contacts](#).

Related Topics

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

Working with Contractor Licenses




Agency staff use the main contractor license page to view a list of records and summary information about each contractor license.

From here, you can manually create a license record. You can also take various actions for each contractor license, such as accessing license details, and validating or deleting the license record.

Depending on your agency's implementation, the grid on the contractors list page appears in a condensed format, where several fields appear in a column, or an expanded format, where one field appears in each column.

Here's an overview of the summary information and actions you can take on the contractors list page as displayed in the condensed format:

1. Select **Contractor > Contractors**.
2. Review the following summary information:

Page Element	Description
 Lock	Indicates that at least one condition is applied to the contractor license. The icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.
 Hold	A Lock condition enforces all rules to restrict permit and planning application activity associated with a license. A Hold condition indicates that one or more rules apply. And the Notice condition shows there's an issue but no restrictions. For more information, see Applying Conditions to Contractor Licenses .
 Notice	

Page Element	Description
License	Displays the contractor license number and its status.
License Type	Displays the license type. The agency sets up contractor license types on the Contractor License Options page.
Dates	Displays the license issue date (or reissue date, if one exists), and the license expiration date.
Contractor	Displays the name of the contractor business and owner name.
Address	Displays the address of the contractor business.
Phone	Displays the phone number of the contractor business.
Email	Displays the email address of the contractor business.
Last Refreshed	Displays the date that license information was most recently synchronized with the external licensing body's record. This field is relevant only if integration is active.
Used in Application	<p>Displays <i>Yes</i> or <i>No</i> to indicate whether this contractor is associated with any permit or planning applications.</p> <p>When a record is created in the main contractor pages, the initial value is <i>No</i>. The value is <i>Yes</i> if an application referencing this license has been submitted.</p>
Contractor Approved	<p>Displays <i>Yes</i> or <i>No</i> to indicate whether this contractor license is approved by the agency and available for use with an application. You can't select a contractor license or submit an application when a license is not approved in the contractor records. If the agency changes a license to not approved after an application was submitted, an icon on the license in the application details indicates that the license is not approved.</p> <p>This option doesn't affect the license status. For example, you can change an active license to not approved for business purposes.</p>

- Click the column to sort by the fields in each column. When the grid is in the condensed format, you can click the **Contractor** column to sort by *Business Name* or *Owner Name*.

In the expanded format, **Business** and **Owner** are separate columns. In the expanded format, you can personalize the grid display in addition to sorting by column. For information about condensed and expanded grid formats and common grid controls in the classic interface, see [Using Grids](#) and [Personalizing Grid Displays](#).

4. Use the three-dot **Actions** menu to perform these actions:

Action	Description
Validate	Select to retrieve and save updated license information from an external licensing body. This action is available only when integration with the licensing body is enabled.
Delete	Select this action to delete the contractor record. This action is available only to system administrators and only when the contractor record hasn't been used in any applications, as indicated by the value in the Used in Application field.

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

Adding Contractor Licenses

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

Your agency may initially use an automated batch method to load multiple license records from a file or an integration with an external licensing body. The batch method can also be used to update license records through an integration on a regular basis. For more information about adding or updating contractor licenses automatically, see [Loading Contractor Licenses and Contacts](#).

For information about adding contractor licenses to a permit or planning application after it's been submitted, see [Working with Contractors and Agents in Applications](#).

Here's how to manually add a contractor license to the contractor records:

1. Select **Contractor > Contractors**.
2. Click **Add**.

The **Add Contractor** page displays the following the read-only information:

Page Element	Description
License Source	Identifies the license's status coming from the licensing body and brought in through integration with the external source. See Setting Up Contractor License Options .

3. In the **License Number** field, enter the license number that was issued by the licensing body.
4. Turn on the **Contractor Approved** switch to indicate that this license is available for use in applications.

5. Whether or not your agency integrates with an external licensing body, enter the following:

Page Element	Description
License Type	<p>Select the license type for contractor licenses. Although your agency can create multiple license types as part of the contractor options, Oracle recommends using a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.</p> <p>Oracle recommends adding a license type with the value <i>LICENSE</i> to the License Types grid in the agency-level contractor license options. That way, if your system is integrated with an external source and the integration doesn't return license types, then <i>LICENSE</i> appears as the default value on the contractor license. For more information, see Setting Up Contractor License Options.</p>
License Status	<p>Select the license status. Values include <i>Active</i>, <i>Canceled</i>, <i>Expired</i>, <i>Suspended</i>, <i>Revoked</i>, and <i>Inactive</i>.</p> <p>This field is available even when integration is active, but the initial value is based on the status from the external licensing body and the contractor options that map licensing body statuses to internal statuses.</p> <p>When you're setting up the status rules in the contractor license options, you can indicate which statuses allow an application to be submitted. For more information, see Setting Up Contractor License Options.</p>

6. If you use integration to get information from an external licensing body:

a. Click **Validate**.

This button is visible only when integration is enabled. The validation process uses the license number to retrieve additional details from the licensing body. When the process finishes successfully, it populates the rest of the fields on the page.

It's helpful to note that contractor selection in the application intake and the transaction details also automatically fills in the contractor fields. However, this information comes from the agency's list of contractors that have already been validated. If the contractor isn't in the agency contractor list, and an integration is available, the contractor information comes from the external source.

b. Confirm the license status.

The read-only **Source Status** field displays the status provided by the external licensing body. This value is updated any time you re-validate the license. Your contractor options map the source status to a status that comes from the set of statuses your agency assigns to licenses. If a source status is not mapped to an agency status, the default agency status is *Other*.

7. Enter, update, or review information about the business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

Business information includes these fields:

Page Element	Description
Business Name	The name of the contractor business.
Owner Name	The owner of the contractor business.
Ownership Type	The ownership structure for the business, such as <i>Sole Proprietor</i> or <i>Partnership</i> .
Postal Code	<p>The business address. The Country field displays US.</p> <p>As you enter a Postal Code, the type-ahead list shows values that include appropriate city and state combinations. After you select a value, the city and state appear as read-only fields, and two address fields appear so that you can enter the rest of the address.</p> <p>If you don't know the postal code, click the Don't know link to display a full set of address fields.</p>
Address Line 1 and Address Line 2	The business address. Only one address line is required.
Phone	The phone number for the business.
Email	The email address for the business.
Issue Date	The date that the license was originally issued.
Reissue Date	The date that the license was reissued after a period of inactivity or after it expired.
Expire Date	The date that the license expired or is due to expire.

8. Enter, update, or review additional information about the business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

System-wide contractor options determine what additional information is available and how it is labeled. Your agency can change the section names on the Contractor License Sections page. If the agency displays all available information using the default labels, these sections appear:

Section Name	Description
Classifications	<p>License classifications indicate the type of work that the contractor is licensed to perform.</p> <p>This grid lists a Code and a Description for each classification.</p> <p>If integration is not active and the fields are editable, selecting a code displays the associated description.</p>
Contractor Bond	<p>Contractor bond information includes the Company Name (the bond issuer), Policy Number, Amount, Effective Date, and Cancellation Date.</p>
Other Bonds	<p>Information for other bonds includes a Qualifier Name (the name of the qualifying individual on the contractor license bond) and the same fields that appear for contractor bonds.</p>
Workers' Compensation	<p>Insurance information includes the Insurance Type (such as Workers' Compensation), Company Name, Policy Number, Exempt status, Effective Date, Expiration Date, Cancellation Date, and Suspend Date.</p>
Attachments	<p>Supporting documents can be added after license information has been saved. Attachment information includes the uploaded document, Document Category, and Document Subcategory.</p> <p>When you modify attachments in the contractor record details, you can add a reference to a person associated with the attachment in the Assigned To field.</p> <p>You can modify or delete an attachment only if you uploaded it.</p>

9. To clear all information and start over, click the **Clear** button and go back to the step where you enter a license number.
10. Click **Save**.

Managing Contractor License Details

Agency staff can modify the details for an individual contractor license depending on the assigned permissions. Staff can also manage transactions, contacts, attachments, comments, and conditions.

Modifying License Details

When your agency isn't integrated with an external licensing body, both system administrators and permit technicians can update license information. When integration is on, only system administrators can update license information, but permit technicians can approve licenses.

Only agency staff with the contractor administration duty role have the privileges needed to delete a license from the contractor records.

Here's how to modify the license information for a contractor:

1. Select **Contractor > Contractors**.
2. Select the row of the contractor license that you want to modify.
3. Click the **License Details** tab in the left panel or the **View Details** link under the License Details section on the overview page.
4. Click **Edit**.
5. Make your updates:
 - Turn on the **Contractor Approved** switch to indicate that this license is available for use in applications.
 - Update the **License Status**.
 - If integration is active, click the **Validate** button to retrieve the most recent contractor information and refresh the license detail fields.

System administrators can update data manually even when integration is active.
 - If integration is not active, manually modify the contractor information as needed.
6. Click **Save**.

Viewing Transactions

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

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

Working with Contacts

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

Working with Attachments

Only agency staff can add, view details, download, or delete attachments in the contractor license record details on the Attachments page. You can modify or delete an attachment only if you uploaded it. Click the Attachments tab in the left panel to open the Attachments page.

1. On the Attachments page, click **Add** to upload the file.
2. Add a description, document category, and document subcategory on the Add Attachments page.
If there are agents for the contractor associated with this contractor license, you can select one of those people to reference in the **Assigned To** field.
3. Click the **Actions** icon and select *View Details* for an attachment to view or modify details. You can update the description, document category, document subcategory, and referenced person.
4. To download or delete an attachment, click the **Actions** icon and select the respective link.

For more information, see *Working with Application Attachments*.

Adding Comments

Only agency staff can add or delete comments in the contractor license record details on the Comments page. You can modify or delete a comment only if you added it. Click the Comments tab in the left panel to open the Comments page. Comments are for internal reference only and not visible to the public.

1. On the Comments page, click the **Add Comment** button to open the Add Comment page and enter a new comment in rich text formatting. Rich text formatting enables you to select fonts, add numbered lists, insert links, and more.
2. You can modify or delete a comment only if it was entered by you. Click the specific comment row to open the editor view and make changes or click the **Delete** button.
3. Click **Save** to post the comment and return to the Comments page.

For more information, see *Working with Comments* and *Managing Comments*.

Working with Conditions

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

Adding Contractor License Contacts

Contacts for a contractor license can be collected during the application or contractor registration process, manually added to the agency-maintained contractor license information, and loaded from a file using a batch import process.

When applicants identify themselves as authorized agents for a contractor in a permit or planning application, their contact information appears on the Contacts page in the license details. Agencies can also manually add contractor contacts or authorized agents associated with the license directly to the contractor license details. You can add contacts who are already registered in the system and also register new contacts.

You may select contacts from the contractor's contact list or manually add authorized contacts during contractor registration or when filling out a business license application. Applicant information is automatically copied to the **Contact Person** section of the contractor license. You must identify whether the applicant is the license holder or authorized agent, and the contact type. The contact type shows the contact's access level to the transaction. Business

owners, applicants, primary contacts, and system administrators can change the access level on the Contacts page in the application or transaction details. When the contractor registration or business license is approved by the agency and active, the contacts are added as authorized contacts for the contractor license in the agency-maintained contractor list.

To add multiple license contacts to the license details from a file, use the Load Contractors batch import process. Once the contacts have been loaded, you can update contact information or register new contacts so that they have access to the applications they are associated with. For more information about the batch import process, see [Loading Contractor Licenses and Contacts](#).

When a contact is added, the status is automatically verified and active. Only contacts with a *Contractor* contact type and an *Active* status can be selected as the contractor's contact in an intake form.

Only system administrators can delete contacts from the license details.

Manually Adding License Contacts

Here's how to manually add contacts who are already registered in the system to the license details:

1. Select **Contractor > Contractors**.
2. Select the row of the contractor license that you want to modify.
3. Click the Contacts tab in the left panel to open the Contacts page.
4. On the Contacts page, click **Add** to add a contact.
5. On the Select from Registered Users page, click the row for the contact you would like to add.
6. Select the contact type from the drop-down list. Choose from *Contractor* or *Authorized Agent* and click **OK**.
7. Select a contact in grid to update the verification status and contact information on the Contact Details page. You can't update the contact's name.

You can also register a new contact when you manually add a contact to the license details:


1. On the Contacts page, click **Add** to add a contact.
2. On the Select from Registered Users page, click the **Register New Contact** link.
3. Fill out the registration form with contact information and select the contact type from the drop-down list. Choose from *Contractor* or *Authorized Agent*.
4. Click **Register**.
5. Click **Done** on the Registration Confirmation page.

Working with License Contacts Loaded from a File

When a contact has been added to the license details from a file using the batch load process, you can manually update the contact information, update the contact information by selecting a registered user, or register the contact.

The batch load process replaces license contacts already in the license details with the contact information from the file if there's a matching email, first name, middle name, and last name. If an exact match of email and name isn't found, the process creates a new license contact.

Here's how to update license contacts that were loaded from a file in the license details:

1. In the Contacts grid, you'll see the **Contact Uploaded from File** icon in the row of contacts added using the batch load process: 
2. Click the row of the contact you want to manually update. On the Contact Details page, you can update the contact information, including the name, verification status, contact type, email address, address, and phone.

3. If you want to update the contact information by selecting a registered user or register the contact, click the **Actions** button at the end of the row for the selected contact and click *Select or Register User* in the actions menu.
4. On the Select from Registered Users page, you can:
 - Select an existing registered user from the list.

If the email address of the loaded contact matches a registered user in the system, select the user in the search results to update the contact information.

Select the contact type from the drop-down list: *Contractor* or *Authorized Agent* and click **OK**.
- Click the **Register New Contact** link to register this contact using the loaded contact's information.

The registration form is automatically filled in with contact information from the loaded file. Select the contact type from the drop-down list: *Contractor* or *Authorized Agent*.

Click **Register**.




Click **Done** on the Registration Confirmation page.

Viewing Contractor License Use

The Transactions page in the contractor details provides a list of the permit and planning applications where the contractor is used.

Agency staff can view all transactions associated with the contractor license in the agency's license details.

1. Select **Contractor > Contractors**.
2. Select the row of the contractor license that you want to review.
3. Click the Transactions tab in the left navigation panel.
4. View the applications listed on the Transactions page.

Page Element	Description
	Indicates the column that shows condition icons when a grid is displayed in the expanded format. Click the condition icon to view a list of conditions placed on the application and drill down to the Conditions page in the application details. For more information about conditions placed on permits or planning applications, see Applying Conditions to Applications .
 Show All Statuses	Turn on the switch to display applications that are no longer in progress, such as completed or withdrawn. When the switch is off, the grid displays only applications that are in progress.
	Indicates applications where the contractor is no longer being used.

Page Element	Description
Application information	Review summary information about an application: <ul style="list-style-type: none">○ ID○ Application○ Status○ Property○ City○ Description○ Applicant○ Total Fees

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

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

Managing Authorized Agents

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

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

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

To manage authorized agents for a license:

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

Page Element	Description
Name	Displays the authorized agent or contractor's name, email, and phone.

Page Element	Description
Email	Displays the email address of the license contact.
Phone	Displays the phone number of the license contact.
Business	Displays the business name of the license contact.
License Holder	Indicates whether this authorized agent is the license holder of the contractor license.
Type	<p>Displays the relationship this person has to the contractor license:</p> <ul style="list-style-type: none"> ○ <i>Authorized Agent</i>: A person who has shown valid documentation for using this license. ○ <i>Contractor</i>: A person who is a contractor operating under this license. <p>Note: Only active contractors can be selected as a contractor license contact on the permit or planning application intake form.</p>
Active	<p>Displays <i>Yes</i> if the agent has been verified.</p> <p>Displays <i>No</i> if verification is pending or the verification has failed.</p>

- Click the row for an authorized agent to access the contact details.
- In addition to the contact information, you can update these fields on the Contact Details page. You can update everything except the agent's name.

Page Element	Description
Verification Status	<p>Select an option:</p> <ul style="list-style-type: none"> ○ <i>Verified</i> ○ <i>Pending verification</i> ○ <i>Verification failed</i> <p>The default status for an agent who submits an application is <i>Pending verification</i>. When you manually add an agent, the status is <i>Verified</i> and the Active checkbox is available.</p>
License Holder	Select the checkbox to indicate that this authorized agent is the license holder of the contractor license.

Page Element	Description
Active	Select the checkbox to indicate that the agent has been verified. When the verification status is <i>Pending verification</i> or <i>Verification failed</i> , the Active checkbox is automatically deselected.
Business	Enter the agent's business name.
Type	Select <i>Authorized Agent</i> or <i>Contractor</i> to indicate how this contact person is associated with the license.

- Click **Save**.

Applying Conditions to Contractor Licenses

Agency staff can apply conditions to contractor licenses to indicate an issue exists and limit permit or planning application activity when the contractor license is used. For example, a condition applied to a contractor license may prevent the submittal of an application where the license is selected or an inspection can't be requested for a permit associated with the license. Your agency can also set up the system to automatically apply contractor license conditions when the contractor license or insurance expires.

Agency staff apply, modify, and resolve contractor conditions on the contractor records in the agency-maintained list. The Conditions page in the contractor details lists all of the conditions applied to the selected contractor, with applied conditions followed by resolved conditions. The condition indicator in the header of the detail pages displays the most severe condition. Click the **All Conditions** link next to the icon to open a modal window that displays all active conditions applied along with their severity, applied date, and display message.

When you select the option to apply a contractor condition to transactions, the contractor condition is applicable to permits and planning applications when the license is used. You can choose whether to apply the condition to in-process permits and planning applications.

CAUTION: Changing the license type clears conditions on the license. The license type can only be changed when the license isn't used on a transaction and doesn't have any conditions. For more information about license types, see [Contractor License Overview](#) and [Adding Contractor Licenses](#).

Adding a Condition to a Contractor License




- Click **Contractors** on the agency springboard.

Select a contractor license.

Click **Conditions** in the left panel.

- Click **Apply Condition** in the right panel.

3. On the Condition Details page, enter values for the following fields:

Page Element	Description
Condition Name	<p>Use the lookup prompt to search for and select the condition that you want to apply. The search page lists the available conditions set up for contractor licenses along with their severity, display message, and description.</p> <p>For more information on conditions, see Setting Up Conditions.</p>
Display Message	<p>Displays the message associated with the selected condition. This message is entered by your agency administrator in the setup page and can't be updated here.</p>
Severity  Lock  Hold  Notice	<p>Displays the level of severity defined for the selected condition.</p> <ul style="list-style-type: none"> ○ <i>Lock</i>: This severity suspends all operations and selects all rules for the condition. ○ <i>Hold</i>: This severity enables agency staff to select the rules that apply to the condition. ○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.
Apply Condition to Transactions	<p>Applies the condition to permits and planning applications that are associated with the selected contractor license.</p> <p>When you turn off this switch, the only condition rule that can apply is <i>Prevent Application Progress</i>, which prevents you from submitting an intake form using the contractor or manually adding the contractor to a permit or planning application.</p> <p>The condition setup determines whether this switch is turned off or on by default.</p> <p>For more information on setup and condition rules, see Setting Up Conditions.</p>
Include in-process transactions	<p>Turn on this switch if you want to apply the condition to the in-process permits and planning applications related to the contractor license.</p> <p>This option appears only if the Apply Condition to Transactions switch is turned on.</p> <p>You can click the View Impacted Transactions link to view the list of permits and planning applications where the condition will be applied.</p>
Condition Rules	<p>Condition rules available for selection are based on the severity of the condition you have selected. For example, for a condition with a Hold severity, you must select at least one condition rule, and for a condition with Lock severity, all condition rules are automatically applied.</p> <p>Available rules include the following:</p>

Page Element	Description
	<ul style="list-style-type: none"> ○ Prevent Application Progress (applicable only when a license is used on an intake form) ○ Prevent Workflow Advancement ○ Prevent Issue or Final ○ Prevent Payment ○ Prevent Inspection Schedule ○ Prevent Inspection Result ○ Prevent Final Inspection <p>You also can't add the license to the Contractor page in the application details when the Prevent Application Progress rule is applied.</p> <p>For condition rule descriptions, see Setting Up Conditions.</p>
Priority	Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .
Description	Displays the description entered by your agency administrator on the condition setup page, but you can update the text here.
Additional Information	Displays additional information entered by your agency administrator in the condition setup page, but you can enter new information here.

4. Click **Save**.

Resolving a Condition

You can resolve a condition that was applied to a contractor license. You must resolve the Lock and Hold conditions on licenses to lift any restrictions on application activity.

1. Click **Contractors** on the agency springboard.
Select a contractor license.
Click **Conditions** in the left panel.
2. Click **Resolve** for the condition you want to remove.
3. On the Resolve Condition page, enter a description of how the condition was resolved in the **Resolution Action** field.
4. Click **Save**.

You can view resolution details for a resolved condition by clicking the **View More Details** button for a condition in the list.

Modifying a Condition

You can modify a condition that you applied to a contractor license.

1. Click **Contractors** on the agency springboard.

Select a contractor license.

Click **Conditions** in the left panel.

2. Click the **View More Details** button for the condition you want to modify.
3. On the Condition Details page you can update the priority, description, and additional information.
4. Click **Save**.

You can't modify any fields for a resolved condition, but you can view the resolution details by clicking the **View More Details** button.

Using Scheduled Rules to Add a Condition

When a contractor license or insurance expires, your agency's system can apply a condition to the contractor license that will stop application progress until the expired license or insurance is managed.

Your agency can use these Scheduled Rules events in the Business Rules Framework to monitor when a license or insurance expires: Contractor License Expiration and Contractor License Insurance Expiration.

Here's where you can find more information about automatically applying license and insurance expiration conditions:

1. Your agency might leverage the same conditions that can be applied manually or define new conditions. Conditions can be Lock or Hold conditions, depending on the actions the agency wants to prevent. See [Setting Up Conditions](#).
2. Setup includes 1 or more rules for each event and configured criteria and actions to apply 1 or more conditions. See [Setting Up Scheduled Rules](#).
3. Depending on how rules processing is set up, your agency might run the rules on a daily basis to check for licenses and insurance that expired the day before. See [Using the Process Monitor](#).

14 Managing Communications

Using the Communication Center

The Communication Center for agency staff lists all alerts, emails, notifications, and texts that have been triggered from the system and sent manually. You can also post a banner alert, send an email, notification, or text as needed, and manage communication errors.

The communications that appear in the Communication Center were sent as part of an event or action that a registered public user or agency staff performed, or that the agency staff sent to the user directly. In-application communications associated with a particular business license, permit, or planning application also appear in the Communication Center. All communication errors that occurred are listed in the error log tab, which is visible only to system administrators.

For information about creating and updating ad hoc communications in the Communication Center, see *Working with Ad Hoc Communications*.

You access the Communication Center by clicking the tile on the Agency Springboard or selecting **Communication Center** in the Navigator.

Managing Communication Errors

The error log displays the error message captured by the system as well as information about the communication. Only system administrators have access to the error log and can trace a problem back to its source. For example, if the communications server is unavailable or the attribute information in a communication template is incorrect, the system administrator can troubleshoot based on the error log information.

Select the **Error Logs** tab in the Communication Center to access error information. You can review these details for each error:

Page Element	Description
Transaction Reference	Displays the permit number, which is the first key name and value of the record.
Event and Template	Displays the event name and template name used in the communication.
Error Reference	Displays a system-generated reference number for the error.
Channel Type	Identifies the channel type used by the communication. For example, web form, email, notification, or text.
Error Text	Displays the error captured by the system. The message may identify the source of the error such as a problem with a template.
Created By	Lists the person who initiated the communication and when the error log entry was created.

When resolving errors related to the communication template, see information about working with attributes in [Using Attributes in Communication Templates](#).

Checking the Delivery Status of Email Messages

Agency staff can check the status of ad hoc messages sent through user messaging service (UMS) to make sure that all messages were delivered as requested. After sending email ad hoc messages, agency staff can run the Sync Email Message Status ESS job to see if any email messages failed. If any messages fail, a new **Delivery Status** icon appears on the **Communication** tab for a permit, and then agency staff can review and take action.

For more information about running the Sync Email Message Status process, see [Using the Process Monitor](#).

Working with Ad Hoc Communications

Ad hoc communications enable agency staff to create and distribute emails, notifications, and texts as well as post banner alerts as needed. Agency staff can create and update ad hoc communications in the Communication Center.

Alerts appear as text in the banner of the Agency Springboard or the landing pages for all anonymous users or guests, all registered users, or individual users. Emails are messages sent to recipients and accessed through an email client. Notifications appear when registered users click the notification icon in the global header at the top of the page. Short message service (SMS) text messages are electronic messages sent to user mobile numbers over a cellular network or through an internet connection.

Note: Agency staff can also create application-specific ad hoc emails, notifications, and texts on the Communication Details page in the transaction detail pages. You access the transaction through the Transactions page, where you select a specific business license, permit, or planning application and select the Communications menu item in the left-panel navigation. For more information, see [Working with Communications](#) (Permits and Planning Applications) or .

Alert setup using the delivered PSC_GENERIC_ALERT event is also available. For step-by-step instructions for setting up alerts using the delivered events, see [Defining Alerts](#).

System administrators can troubleshoot failed communications on the Error Logs tab in the Communication Center. For more information, see "Managing Communication Errors" in [Using the Communication Center](#).

Adding Ad Hoc Alerts

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

Page Element	Description
Reference Name	Enter a unique name for the alert.
Start Date Time and End Date Time	Enter the date and time when the alert starts and stops displaying.

Page Element	Description
Enabled	Turn on the switch to activate the alert.
To	<p>Enter a value for the target recipients of the alert:</p> <ul style="list-style-type: none"> Individual Registered Users Enter comma-separated user IDs for the registered users, for example, SYSTEM_ADMIN, BUSINESS_ANALYST. All Registered Users Enter this attribute: \${User}. The application displays the alert when the registered user logs in. All Anonymous Users Enter this attribute: \${Anonymous}. A Combination of Users Enter a string including comma-separated user IDs for the registered users, \${User} for all registered users, and \${Anonymous} for all anonymous users.
Message Body	Enter the main body of the alert using plain, unformatted text.
Select and Insert	<p>These fields enable you to insert variables for attributes into your message. You select the field and the attribute that you want to insert in that field, and click Insert to enter a variable for that attribute.</p> <p>For example, if you select the <i>Body</i> field and the <i>Current date</i> attribute, and click Insert, the \${Current Date} variable appears in the Message Body field of the alert. When the application displays this alert, the current date is included in the body text.</p> <p>For more information, see Using Attributes in Communication Templates.</p>
Remarks	Enter any reference information for agency use. These remarks are not included in the displayed alert.

4. Click **Save**.

Modifying Ad Hoc Alerts

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

Deleting Ad Hoc Alerts

1. Select **Communication Center** in the Navigator, or click **Communication Center** on the Agency Springboard.
2. On the Alerts tab of the Communication Center page click **Edit**.

3. Select the checkboxes next to the alerts that you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

Sending Ad Hoc Emails, Notifications, and Texts

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

Page Elements	Definition
Channel Type	<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 Notifications button in the header at the top of the page in the application. ○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users. You can't change the sent number because it's coming from a third-party service. <p>Note: The fields that are available to define on this page vary depending on the channel type and display format that you select.</p>
Visibility	<p>Select which users can see this message. All communications can be seen by agency staff. Values are:</p> <ul style="list-style-type: none"> ○ <i>Applicant and contacts</i>: Includes agency staff, the applicant, and contacts added to the transaction. ○ <i>Agency staff only</i>: Includes only agency staff. ○ <i>Applicant</i>: Includes agency staff and the applicant on the transaction.
Display Format	<p>Select the display format of the message. Values are:</p> <ul style="list-style-type: none"> ○ <i>HTML</i>: Displays rich text, links, and images ○ <i>Text</i>: Displays plain, unformatted text. <p>Note: This field does not appear for the <i>Text</i> channel type.</p>
Select and Insert	<p>These fields enable you to insert variables for attributes into your message. You select the field and the attribute that you want to insert in that field, and click Insert to enter a variable for that attribute.</p>

Page Elements	Definition
	<p>For example, if you select the <i>Body</i> field and the <i>Current date</i> attribute, and click Insert, the <code>\${Current Date}</code> variable appears in the Message Body field of the alert. When the application displays this alert, the current date is included in the body text.</p> <p>For more information, see Using Attributes in Communication Templates.</p>
Reference	Enter a unique alphanumeric reference for the communication.
To	<p>Enter a value for the target recipients of the message.</p> <p>For notifications, enter comma-separated user IDs for the registered users, for example, <code>SYSTEM_ADMIN,BUSINESS_ANALYST</code>.</p> <p>For emails, enter comma-separated email addresses for the recipients, for example, <code>john.doe@example.com</code>.</p> <p>Enter comma-separated phone numbers for text messages.</p>
Cc and Bcc	<p>Enter the email addresses of the people or organizations that you want to receive a copy or blind copy of the message.</p> <p>Note: These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>
From	<p>Enter the email address, user ID, or phone number of the person or organization who is sending the generated message.</p> <p>For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service.</p> <p>Note: Enter email addresses for the <i>Email</i> and <i>Emails and Notifications</i> channel types, user IDs for the <i>Emails and Notifications</i> and <i>Notification</i> channel types, and phone numbers for the <i>Text</i> channel type.</p>
Subject	<p>Enter a brief description of the purpose and content of the message.</p> <p>Note: This field does not appear for the <i>Text</i> channel type.</p>

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

4. Click **Send**.

Viewing Ad Hoc Emails, Notifications, and Texts

1. Select **Communication Center** on the agency springboard.
2. For each row on the **Emails, Notifications, and Texts** tab of the Communication Center page you can:
 - Click the **Actions** icon to resend or forward the message.

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

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

- Click the **View More Details** button to view detailed information about the message.

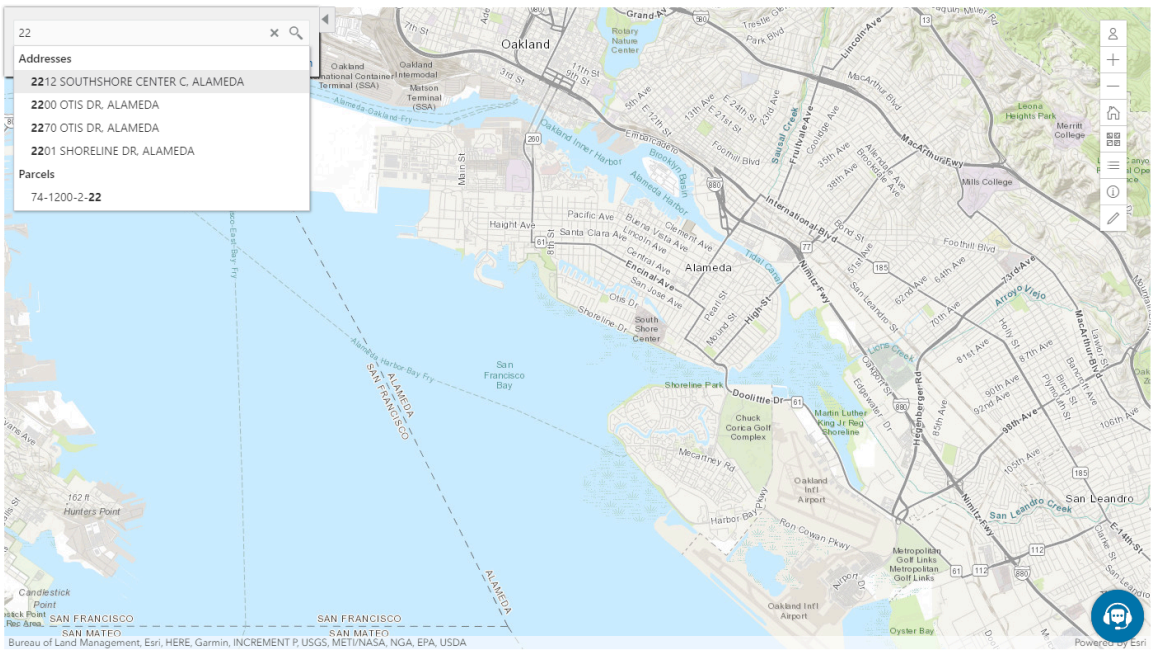
15 Working with Maps

Overview of Delivered Maps

Maps provide a convenient way for agency staff and public users to see and interact with geographical information. For example, maps can show the locations of parcels and addresses as well as the locations of transactions such as permits, planning applications, projects, incidents, cases, and business license activity.

Note: Map functionality relies on integration with a third-party map service such as Esri Geographic Information Systems (GIS) and configuration in Oracle Permitting and Licensing. For more information, see the *Implementing Your Cloud Integrations* guide.

This example shows the main map that agency staff uses to see properties and transactions.



The following tables describe the delivered maps in the Oracle Permitting and Licensing system.

Main Maps

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

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

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

Additional Maps for Applications

This table lists additional maps that support applications:

Map Name	Users	Navigation	Usage
Application intake	Agency staff Registered public users	Access the Property section of a new or submitted application, then click the Map View icon.	<p>Choose properties and other GIS objects to associate with the application.</p> <p>See <i>Working with Property Information</i> when viewing maps in the Redwood Experience user interface.</p>

Map Name	Users	Navigation	Usage
Mobile inspection	Agency staff	Use the Inspector Application for mobile devices.	View permit and business license application locations on a map. See <i>Performing Inspections on the Inspector Application</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. 	<p>Create a notification zone by specifying a distance from selected parcels.</p> <p>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.</p> <p>See <i>Creating Map-Based Public Notification Lists</i>.</p>

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> .
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 Application Headers

This table describes the map that appears in application headers:

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

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.	<p>Click to select a map profile. Map profiles control the appearance of the map as well as the availability of other toolbar options.</p> <p>When you click this icon, a list of map profiles appears. The list displays the profile name and a thumbnail image of the map that illustrates its general appearance.</p>
	Zoom In and Zoom Out	Use the Enable Zoom switch on the map profile.	<p>Use these tools to zoom in or out.</p> <p>You can also double-click a map location to zoom in.</p>









Image	Name	Configuration	Description
	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.
	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.

Image	Name	Configuration	Description

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.

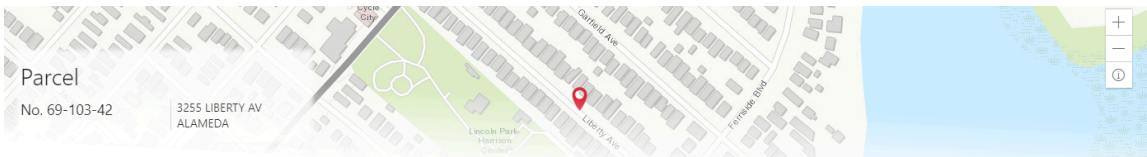
Viewing Map Markers

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.

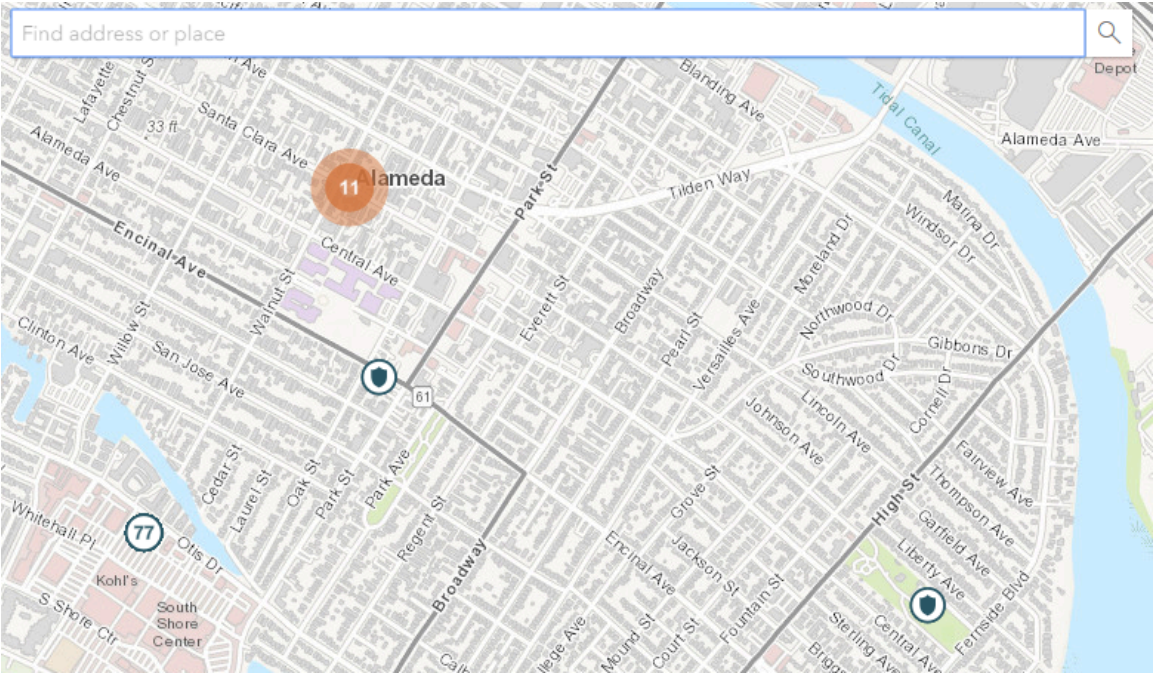


Other Map Markers







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:

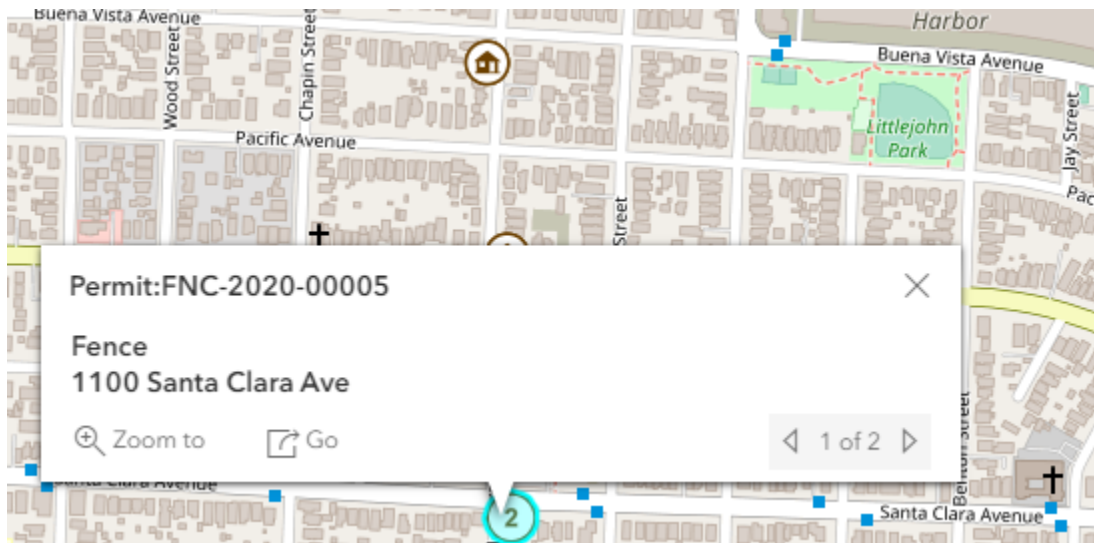
Map Marker	Description
	The location has a single code enforcement issue.
	The location has a single permit application.
	The location has a single planning application.
	The location has a single project.
	The location has a single business license.
	<p>There are multiple transactions at the same location.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

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.

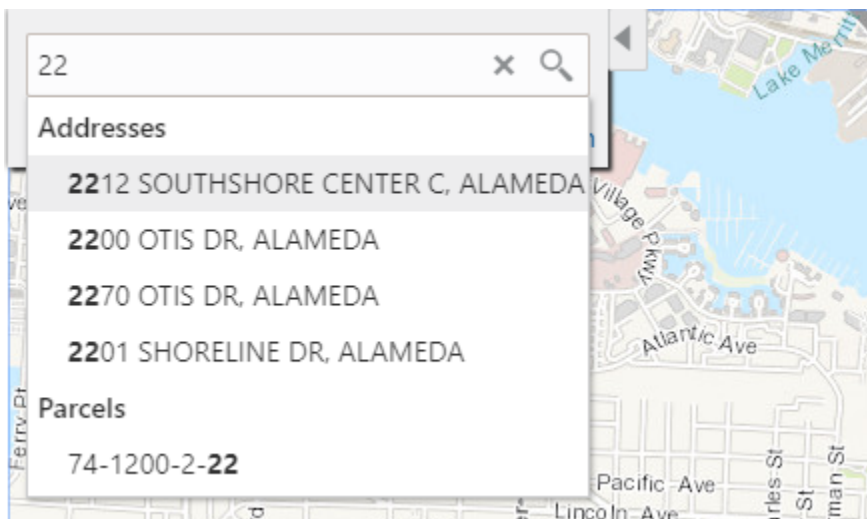
- Search for transactions and view transaction markers on the map.

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.

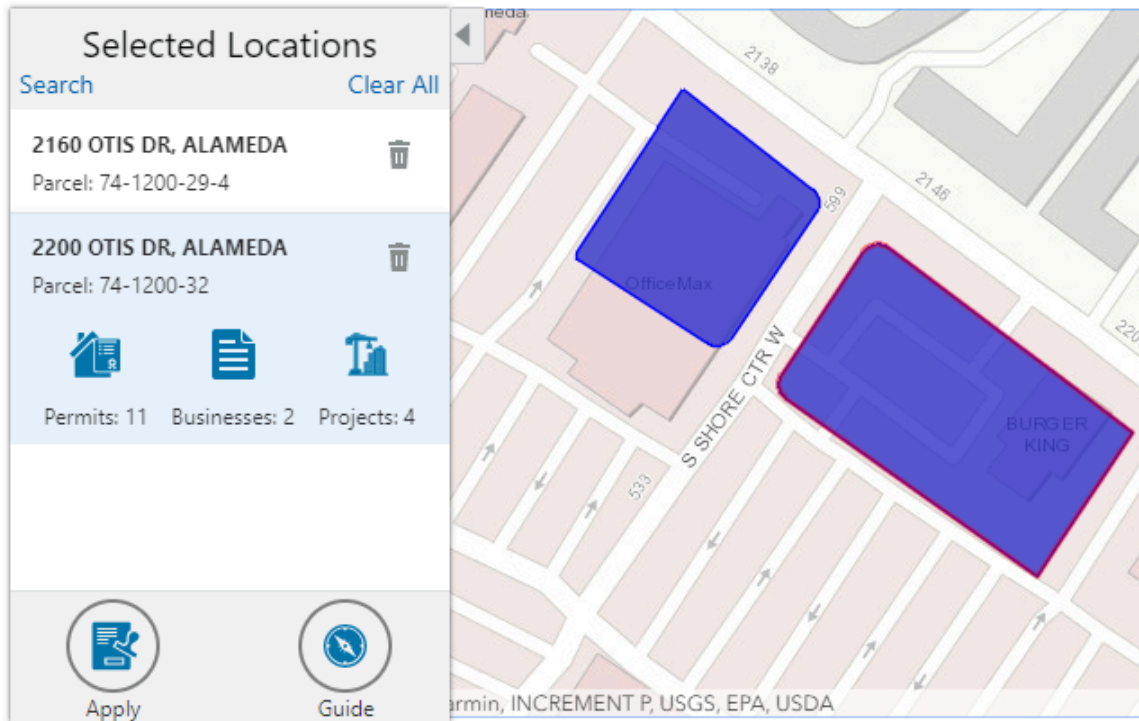
Note: To provide different types of users with the most appropriate interface, there are separate main maps for agency users, registered public users, and anonymous public users. These maps can have different map profiles, giving you control over whether various map options are available to each audience.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

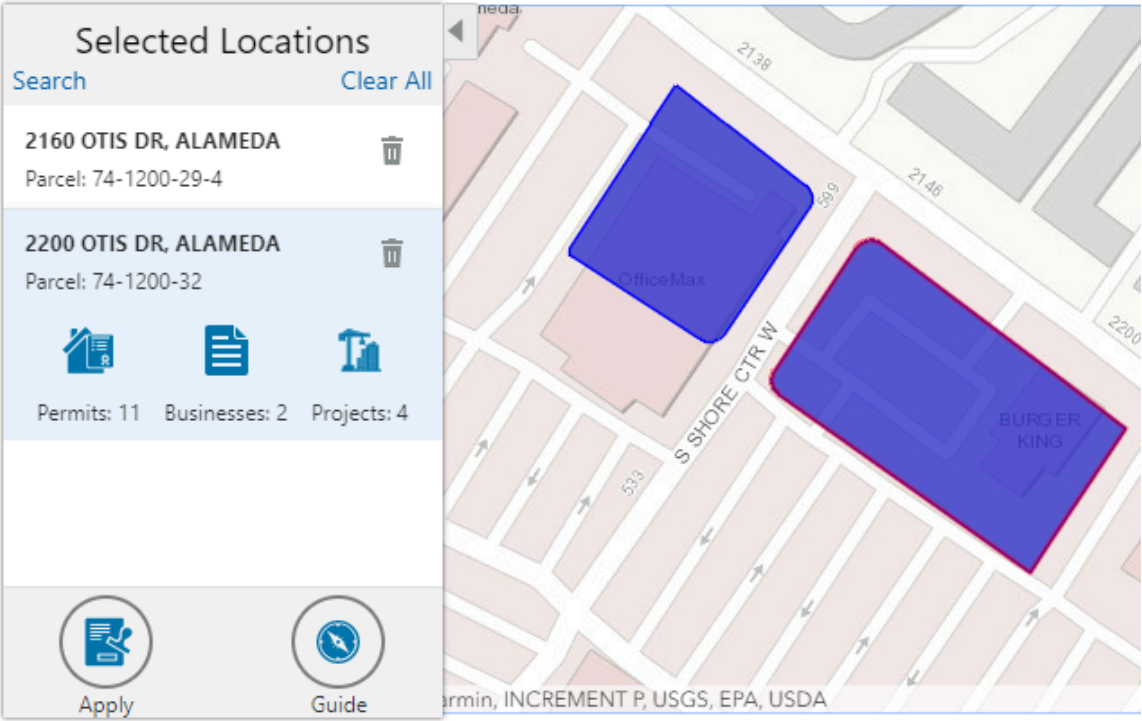
3. Review details of your selections on the Selected Locations list.

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).

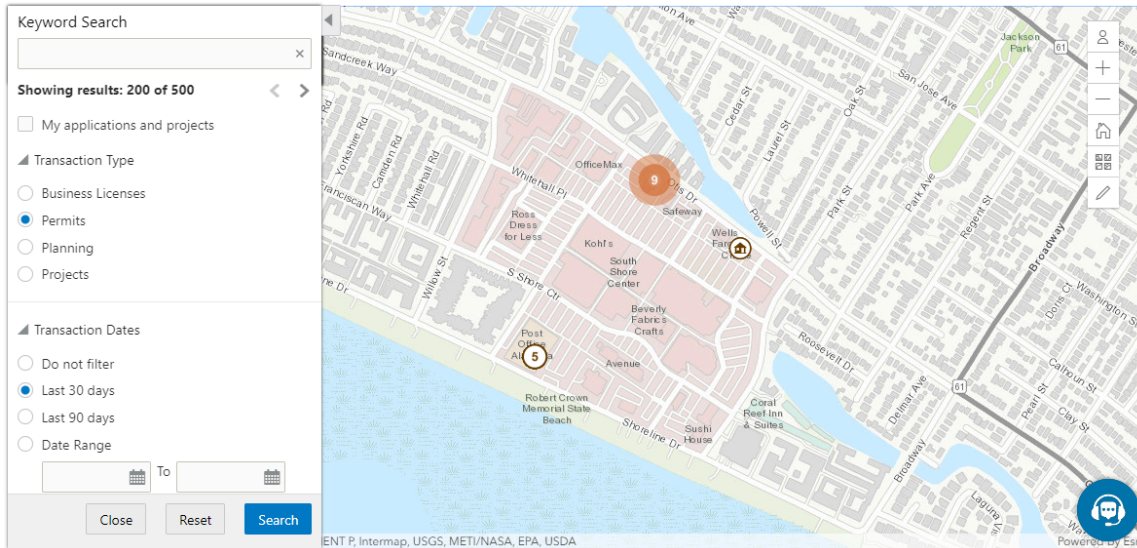
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be pre-filled based on the selected properties.

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 checkbox 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 checkbox 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.

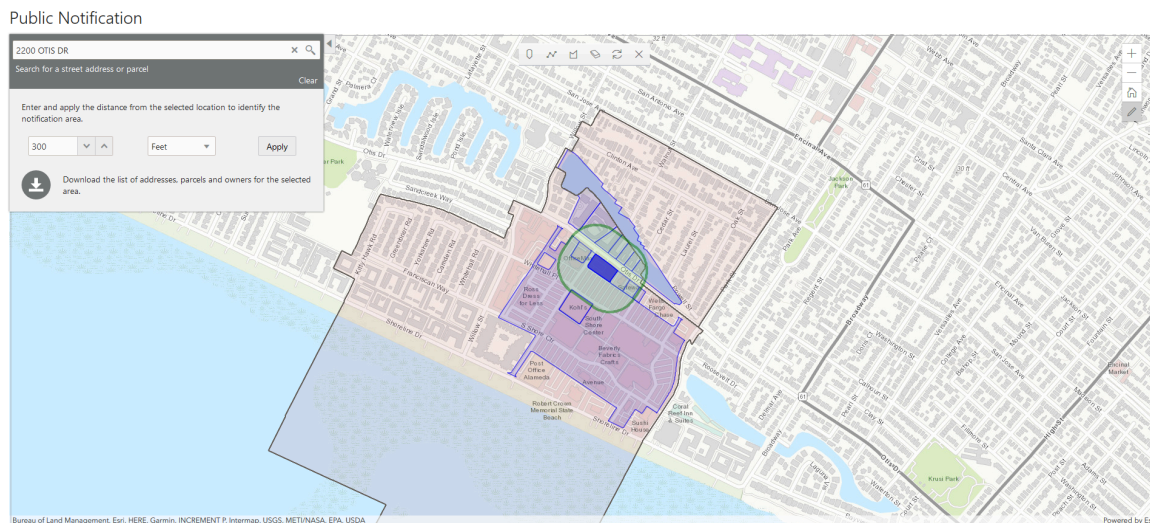
5. Click **Search** to perform the search.
Map markers appear for the transactions that meet your search criteria. The overlay also displays text stating how many results were found.
Users can see up to 200 results at a time. If more than 200 results exist, use the Previous (<) and Next (>) icons to 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.

16 Working with Payments

Security Details for Working with Payments

This topic describes important security roles, requirements, or considerations specific to working with payments.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Cashier Administration	Make payments and manage all cashier related duties.	PSC System Administrator PSC Finance Administrator PSC Cashier PSC System Administrator
PSC Planning and Zoning Fees Management	Add, update, and delete fees on planning applications.	PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Principal Planner
PSC Permits Fees Management	Add, update, and delete fees on permits.	PSC Inspections Supervisor PSC Chief Building Officer PSC Business Analyst PSC Principal Planner PSC Planning Coordinator PSC System Administrator

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

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

Payment Flow Overview

This topic provides a high-level overview of fees and the payment flow. Applicants and contacts with application access can make payments online, and agency staff can assist applicants with payments.

After an application is submitted, the fees are calculated and applied to the applicant's account. The applicant and contacts with application access can pay fees for one application at a time from their Applications list page or from the Fees and Payments page in the application details. Only applicants can select multiple applications for payment on the Make a Payment page, which they access from the registered user landing page or their Applications page. Agency staff can initiate payment from the Transactions list page or from the Fees and Payments page in the application details. System processing for payments triggers workflow and generates accounting, invoices, and communications.

For information about setting up fees and payments, see *Implementing Your Financials Framework*.

Understanding Fees

Some basics about fees include the following:

- Fees for an application are determined by decision modeling and associated with fee schedules.
- Fees may be applied during the application process or later for additional fees or adjustments.
- Fees appear on the Applications and Make a Payment pages for applicants, on the Transactions list page for agency staff, and on the Fees and Payments page in the application details for both agency staff and applicants. Contacts with application access can pay fees from their Applications page and the application's Fees and Payments page.
- If a condition to prevent payment is applied to the transaction, the fees can't be paid until the condition is resolved.
- Agency staff can add, adjust, or refund fees. They can also make full or partial fee payment on behalf of the applicant.
- Applicants receive a fees notice after submitting an application. They are sent subsequent notices when fees due are updated. Agencies may send out notices with consolidated fees on a regular basis.

Fee Payments Process for Applicants

Applicants have different options for paying fees after they log in.

Applicants can pay for fees one application at a time by clicking the **Pay** icon in the application row on the Applications page or by clicking the **Pay** button on the Fees and Payments page for the application. Clicking **Pay** takes the applicant directly to checkout for payment processing.

The **Make a Payment** button on the registered user landing page and on the Applications page takes the applicant to the Make a Payment page, where they can select fees for multiple applications at once before continuing to checkout.

Here's how to pay fees from the Make a Payment page:

1. Select applications for payment.

Fees for applications not selected for payment are still payable and remain on the page.

2. Review the number of applications selected and the total amount, then click the **Make a Payment** button.
3. Review the Checkout page, which shows the different secured payment methods available.

Only agency staff can process cash and check payments.

4. Select one of the payment methods for payment processing and click **Make Payment**.

Depending on the payment service being used, the payment steps differ.

5. Wait for the payment to be processed. If you navigate away from the payment service or close the browser, the payment may not be recorded.

After submitting the payment, the application displays the *Payment Processing* status on the Make a Payment page. If the payment goes through, the application is removed from the Make a Payment page and the applicant is redirected to the page where the payment was initiated. If the payment fails, the applications can be selected for payment again.

For more information, see *Making Payments*.

For information about paying fees for individual applications on the registered public user's Applications page or the Fees and Payments page in the application's details, see *Managing Applications* or *Managing License Applications*, and *Working with Fees and Payments*.

Fee Payments Process for Agency Staff

Agency staff can use the following process to assist an applicant with a payment:

1. Click the **Pay** button for a permit, planning application, or business license listed on the Transactions page or on the Fees and Payments page in the application details.
2. On the Pay Fees page, review the list of fee items and the total payable fee. If you want to make a partial payment, deselect the *Select All* checkbox to clear the checkboxes for all the fee items and then select individual items. If the application status is *Payment Pending*, full payment is required. That is, fees that are due when you submit an application must be paid in full.
3. Click the **Continue** button.
4. Review the Checkout page, which lists the different payment methods available, such as cash or credit card.
5. Select one of the payment methods for payment processing.

Depending on the payment service being used, the payment steps differ.

After successful payment, the agency user is returned to the page where the payment was initiated. The fee item records are now updated. For more information, see *Managing Applications* or *Managing License Applications*, and *Working with Fees and Payments*.

Making Payments

Registered users can pay fees online using a central payment page and checkout process. The Make a Payment page is used to list applications with fees where the registered users can review and select them before making a payment. Agency staff have the Make Payments page to process payments for multiple applications on behalf of registered users.

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

Registered users include applicants and contacts. Contacts can be primary and others. For more information, see *Managing Applications*. For more information about license contacts with access to pay fees, see *Managing License Applications*.

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

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

For information about fees payment from the registered public user's Applications page or from the agency staff's Transactions page, see *Managing Applications* and *Managing License Applications*.

For information about fees payment from the application's Fees and Payments page, see *Working with Fees and Payments* (Permits and Planning Applications).

Viewing Fees from the Registered User Landing Page

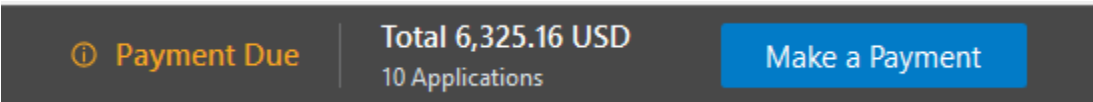
The Make a Payment icon appears in the global header when a registered user logs in. The number of applications with fees for payment, if any, appears on the icon:

This example illustrates the Make a Payment icon showing 10 applications with fees for payment.



The number of applications as well as the amount due for the applications appears on the Make a Payment banner:

This example illustrates the Make a Payment banner.



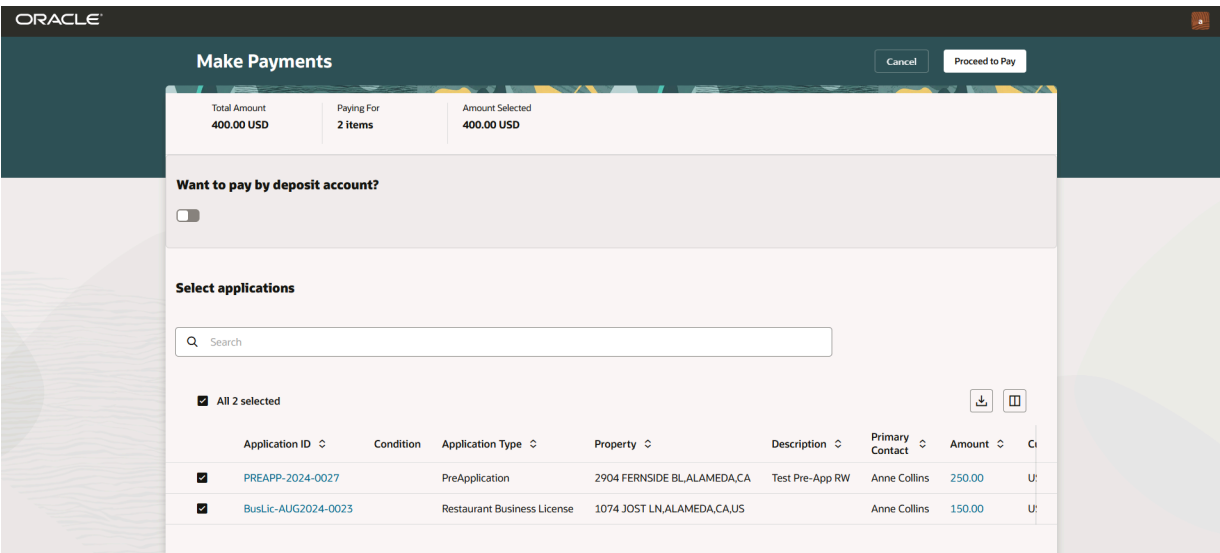
Clicking the icon or the **Make a Payment** button opens the Make a Payment page, which lists the applications with fees that are awaiting payment or payment is in process.

Making Payments as Registered Users


The system initially applies fees to the user's account when an application is submitted. Later fees may be adjusted or added. When fees for an application are due, the registered users can review and select the applications for payment on the Make Payments page. Fees not selected for payment remain on the page.

Fee adjustments are automatically reflected on the page before checkout processing.

This example illustrates the Make Payments page



All applications that can be paid appear in a list. Select the applications to pay and use the fields described in the table to make payments.

Page Element	Description
Total Amount, Payment For and Amount Selected	These fields display the applications and amounts you want to pay.
Deposit Accounts	<p>Turn on this switch to select a deposit account from the drop-down list to make the payment.</p> <p>Note: When a deposit account is selected, only those applications are displayed for which payment can be made using the selected deposit account.</p>
Select All/Deselect All	<p>Select the checkbox to select or deselect all applications. The checkbox can't be selected when the system is processing payment for an application or a condition preventing payment is applied.</p> <p>The Amount Selected field above the grid shows the number of applications selected and the total amount due for the selected applications.</p>
Application	<p>Each item on the page is identified by the application number. Click the application number to open the overview page with the application summary and access to details.</p> <p>The application type, such as <i>Residential Addition</i> or <i>Commercial Renovation</i>, and the Doing Business As (DBA) name (if the business has one), are listed under the application number.</p> <p>If a condition to prevent payment has been applied to the application, a condition icon appears next to the application ID. For more information about conditions, see Working with Application Conditions.</p>
Property	View the location of the property for the application.
Description	View a description of the application.
Primary Contact	<p>View the primary contact for the application.</p> <p>For information on how to add contacts and change the primary contact, see Working with Application Contacts (Permits and Planning Applications).</p>
Amount	<p>View the total fees for the application. Click the fee amount link to open the Fee Detail page, which shows a breakdown of the fees.</p> <p>View the total fees for the application. Click the fee amount link to open the Balance due details drawer, which shows a breakdown of the fees.</p>
Currency	View the currency of total fees for the application.
Status	View the status of fees for the application.
	The Balance Changed alert indicates the fees for the application have been adjusted. Adjusted fees are updated automatically before checkout processing.
Cancel	Click to cancel and go back to the home page.

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

Registered users can't make any changes to the application and associated fees submitted for payment during processing. After the payment processing is complete, the applications are removed from the list, and the system directs the user back to the page where the payment was initiated. If there are no more fees left after a successful payment, the user is directed to their Applications page. If the payment fails, the applications remain on the Make a Payment page and can be updated or resubmitted for payment.

For information about incomplete payments, see *Working with Fees and Payments* (Permits and Planning Applications).

Making Payments as Agency Staff

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

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

1. From the Agency Springboard, select the **Make Payments** tile.
2. On the **Select a customer** drop-down, select a customer.

Note: When a customer is selected, the system loads the payment cart of the selected customer and displays all transactions that the customer can make as a registered public user. If the selected customer has a deposit account, the agency user can turn on the **Want to pay by deposit account?** switch to select an account from the Account drop-down list and make the payment.

3. On the **Make Payments** page, select the checkboxes to choose the applications to make payments.
4. Click **Proceed To Pay**.

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

- Review the **Checkout** page, which lists the different payment methods available, such as cash or credit card.

Note: If there is a credit balance available, agency staff has the option to use the **Apply Credit** switch to apply a credit for a payment on-account towards a payment of a fee amount. Before applying the credit, agency staff can click



icon to get the specifics about the payment on-account balance. If agency staff chooses not to apply the credit for the payment on-account balance, they can issue a refund for it.

- Select one of the payment methods for payment processing.

Depending on the payment service being used, the payment steps differ.

After successful payment, the agency user is returned to the page where the payment was initiated. The fee item records are now updated.

Page Element	Description
Select a customer	Select a customer name from the drop-down list.
Want to pay by deposit account?	Turn on this switch to select a customer's deposit account from the Account drop-down list, to make the payment. Note: When a customer's deposit account is selected, only those applications are displayed for which payment can be made using the selected deposit account.
Account	Click the drop-down button to display a list of the customer's deposit accounts.
Select All/Deselect All	Select the checkbox to select or deselect all applications. The checkbox can't be selected when the system is processing payment for an application or a condition preventing payment is applied. The Total Selected field above the grid shows the number of applications selected and the total amount due for the selected applications.
Application	Each item on the page is identified by the application ID. Click the application ID to open the overview page with the application summary and access to details. The type of application, such as <i>Residential Addition</i> , appears under the application number. If a condition to prevent payment has been applied to the application, a condition icon appears next to the application ID. For more information about conditions, see Working with Application Conditions .
Property	View the location of the property for the application.
Description	View a description of the application.
Primary Contact	View the primary contact for the application. For information on how to add contacts and change the primary contact, see Working with Application Contacts (Permits and Planning Applications).

Page Element	Description
Amount	View the total fees for the application. Click the fee amount link to open the Fee Detail page, which shows a breakdown of the fees. View the total fees for the application. Click the fee amount link to open the Balance due details drawer, which shows a breakdown of the fees.
Currency	View the currency in which the payment is made.
Status	View the status of the payment.
Cancel	Click to cancel and go back to the home page.
Proceed To Pay	Click to access the Checkout page or the Deposit Account Payment page to continue with the payment.

Making Payments for Multiple Business Applications

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

Working with Cashier Sessions

Cashier sessions are instances of a cashier using a specific cash drawer to receive payments from customers. Cashiers add and modify cashier sessions on the Cashier Session page.

Opening a Cashier Session

1. Select **Billing and Payment > Cashier Sessions**.
2. On the Cashier Session page, click **Add**.
3. On the Cashier Session Details page, enter values for the following fields:

Page Element	Description
Cashier Drawer ID	Select the cash drawer that you want to use for this session.
Session ID	Displays the unique, system-generated ID for the cashier session.
Start Time	Displays the date and time the session was created.
Status	All new cashier sessions have a status of <i>Open</i> .

Page Element	Description
Cashier ID	Displays the unique ID of the cashier who is opening the cashier session. Administrators assign cashier IDs to agency staff on the Agency Staff page. You cannot open a cashier session if you do not have a cashier ID assigned to you.
Opening Balance	Enter the amount in the cash drawer at the beginning of the cashier session.

4. Click **Save**.

Modifying a Cashier Session

1. Select **Billing and Payment > Cashier Sessions**.
2. Click a row on the Cashier Session page.
3. On the Cashier Session Details page you can:

- Suspend an open cashier session by setting the **Status** to *Suspended*.
- Reopen a suspended or closed cashier session by setting the **Status** back to *Open*.

This option is available only if the Reopen Cashier Session switch is turned on for the *CASH* payment method on the Agency Payment Options page. See [Setting Up Agency Payment Options](#).

- Close a cashier session by setting the **Status** to *Closed*. When you close a cashier session enter an amount for the **Closing Balance**.

You can now close a cashier session with a zero balance.

Note: The system populates the **End Time** field with the date and time the session was closed.

4. Click **Save**.

Note: You cannot edit a cashier session that has been reconciled. See [Reconciling Cashier Sessions](#).

Reconciling Cashier Sessions

Agency staff adjust and reconcile cashier sessions on the Reconcile Cashier Session page.

Agencies that collect payments must reconcile the money collected in the form of cash and checks at the end of each cashier session. On the Reconcile Cashier Session, agency staff can:

- Reconcile recorded and actual payment amounts.
- Print a cashier session reconciliation report.

This example shows the Reconcile Cashier Session page.

Reconcile Cashier Session

CancelSave ReconciliationComplete Reconciliation

Cash Drawer ID: Cash Drawer 01Session ID: 1022
Start Time: 9/29/18 3:26 AMEnd Time: 8/8/19 11:25 PM
Status: ClosedReconcile Status: Unreconcile

Payment Information

Payment Method	Currency	Opening Balance	Recorded Amount
Cash	USD	100	93.5
Personal check	USD	0	67

Comments

Reconciling Recorded and Actual Amounts

1.

Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2.

Click the row for the cashier session that you want to reconcile.

Note: You can view payment information for open cashier sessions on this page, but a cashier session must be closed before you can reconcile recorded and actual amounts. For more information on closing cashier sessions, see *Working with Cashier Sessions*.

3.

Click the row for the payment method that you want to reconcile to access the Payment Details page.

This example shows the Payment Details page.

Payment Details

Save

Payment Summary

Payment Method: CashCurrency: USD
Opening Balance: 100Total Overage: 0
Recorded Amount: 93.5Total Shortage: 1.25
Actual Amount: 192.25

Payment Details

Receipt Number	Receipt Line Number	Recorded Amount	Actual Amount
6	1	67	
5	1	26.5	

4.

Click a row for a receipt to make changes to the payment information. For cash payments, you can enter comments, but you can't edit any other payment information. For checks, you can edit the following payment information fields:

Page Element	Description
Payment Method	Select between <i>Personal check</i> and <i>Cashier check</i> .
Actual Amount	Typically this is the same as the recorded amount, but in the event that the check was written for a different amount, enter that actual amount here.
Check Number, Check Date, Payer Name, and Address	Update the check and payer information.

Page Element	Description
Comments	Enter any comments you want to add about the check payment.

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

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

Printing a Cashier Session Reconciliation Report

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

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

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

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

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

Generate Accounting Entries for Reconciliation Overages and Shortages

- Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.

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

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

Printing Deposit Slips

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

You print deposit slips using the Print Deposit Slip page.

Prerequisites

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

Generating Deposit Slips

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

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

Page Element	Description

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

3. Click **Print**. The generated deposit slip file opens in a separate browser tab.



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

Viewing Payment History

Agency staff can view payment history on the Payment History page.

The enhanced user experience is now available for the Payments On Account page. The enhanced user experience streamlines the look and feel of this page.

This example shows the Payment History page.

ORACLE		
Payment History		
<div><div>Q</div><div>Payment St... <u>Paid</u> X</div><div>Search</div></div>		
8 items		
Payment Method 	Payment Reference ID 	Payment Transact
Credit card	CRCO_20250205T154349781Z701953	59520
Credit card	CRCO_20250205T154349781Z701953	59520
Offline	OFLN_20250116T091556299Z374333	12345
Credit card	CRCO_20250109T054050935Z533395	48519

Reviewing Payment History

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

Note: Registered public users can also access this page from the Registered Public Landing Page by selecting *View Payment History* from the **I Want To** field. Public users can view only the payments that they submitted.

The Payment History page displays all of the payments received by the agency. You can search for and sort payments by:

- Payment method
- Payment reference ID
- Payment transaction ID
- Receipt date
- Amount Paid
- Currency
- Payment amount
- Payment currency
- Applicant first name and last name

Note: The payer name appears on the Payment History Details page. The payer name depends on the payment method.

- Record ID
- Record Type
- Payment Status
- Deposit Account Number

2. Select a payment to view additional details on the Payment History Details page.

This example shows the Payment History Details page.

ORACLE

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PS

Payment History Details

Cancel

Overview

Payment Method
Credit card

Receivables Receipt Status
None

First Name
Peter

Credit Amount Applied
0.00

Currency
USD

Reversal Reason

Payment Status
Paid

Payment Transaction ID
59520

Amount Due
655.60

Payer Name
df dsf

Service Charge Amount

Payment Reference ID
CRCD_20250205T154349781Z701953

Receipt Date
2/5/25

Last Name
Skate

Payment Amount
655.60

Reversal Flag
No

Payment History Lines

Classification	Record Type	Record ID	Item Description	Item Amount	Item Currency
LIC	GAB TEST FEB 01	AUTO-FEB2025-00411	Application Fee	149.00	USD
LIC	GAB TEST FEB 01	AUTO-FEB2025-00411	Electrical Fees	148.80	USD

The Payment History Lines grid displays the transaction lines associated with the payment. You can select a payment history line to view additional details on the Payment History Line Details modal page.

The Cash Drawer Lines grid displays the cash drawer transaction lines associated with the payment. You can select a cash drawer line to view additional details on the Cash Drawer Line Details modal page.

Note: The Cash Drawer Lines grid does not appear for electronic payments.

The Refund History grid displays any refunds associated with the payment. You can select a refund to view additional details on the Refund Detail modal page. For more information on refunds, see [Viewing and Processing Refunds](#).

The Payments on Account grid displays any payments on account associated with the payment. You can select a payment on account to view additional details on the Payment on Account Details modal page. For more information on payments on account, see [Viewing Payments On Account](#).

You can reverse payments applied in error. For more information, see [Reversing Payment Application Errors](#).

Viewing Invoice History

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

This example shows the Invoice History page.

Invoice History

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

Page 1 of 12 (1-8 of 91 items) | < 1 2 3 4 5 ... 12 > | Show Default

Reviewing Invoice History

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

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

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

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

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

This example shows the Invoice History Details page.

Cancel

Print Invoice

Invoice

EZE-190830-00001

Invoice Amount

148.80

Invoice Currency

USD

Invoice Date

2019-08-30

Person Name

Alden Richards

Address

12pine grove 12 SAN FRANCISCO
California US

Description

EZE-190830-00015

Invoice Lines

Description	Line Amount	Invoice Currency
Electrical Fees	148.80	USD

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

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

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

Viewing and Processing Refunds

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

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

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

This example shows the Refund History page.

Refund History

Refund ID	Refund Type	Refund Method	Refund Request Date	Refund Amount	Refund Currency	Refund Status	Refund Reason	Refund Processed Date
RFND_20191217101050000299540	Chargeback	Credit card	12/17/19	145.00	USD	Refunded	Cancel	2019-12-17T10:12:32.060+00:00
RFND_20191217T0807440000265030	Refund	Offline	12/17/19	111.00	USD	Refunded	Cancel	2019-04-15T00:00:00+00:00
RFND_20191217T242480000295571	Refund	Offline	12/17/19	111.00	USD	Refunded	Paid in error	2019-12-18T23:34:07.520+00:00
RFND_20191217T0641370000224132	Refund	Offline	12/17/19	123.00	USD	Refunded	Duplicate payment	2019-12-18T23:32:45.897+00:00
RFND_20191217T0936310000201719	Chargeback	Credit card	12/17/19	12.00	USD	Failed	Cancel	2019-12-17T09:38:01.582+00:00
RFND_20191217T0936310000260439	Refund	Offline	12/17/19	100.00	USD	Pending	Duplicate payment	
RFND_20191217T0828520000280097	Refund	Offline	12/17/19	300.00	USD	Refunded	Excess paid	2019-12-17T00:00:00+00:00
RFND_20191217T073221000023043	Refund	Offline	12/17/19	111.00	USD	Refunded	Duplicate payment	2019-12-17T07:34:05.522+00:00

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1

2

3

4

5

16

Show Default

Reviewing Refund History

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

The Refund History page displays all of the refunds requested or processed by the agency. You can search for and sort refunds by:

- Refund ID
- Refund Type
- Refund Method
- Refund Request Date
- Refund Amount
- Refund Currency
- Refund Status
- Refund Reason
- Refund Processed Date

2. Select a refund to view additional details on the Refund Detail page.

This example shows the Refund Detail page.

Refund Detail

Refund ID: RFND_20210727T214180000Z1105E

Refund Type: Chargeback

* Refund Method: Credit Card

Refund Request Date: 7/27/21

Refund Amount: 322.08

Refund Currency: USD

Refund Status: Pending

* Refund Reason: Excess paid

Payment Method: Credit card

Payment Reference ID: CRCD_20210721T1037018492037820

Refund Processed Date:

Refund Transaction ID:

Receivables Receipt Status: None

Cancel

Process Refund

Void Refund

Refund Lines

Item Name

Item Description

Item Refund Amount

Item Refund Currency

300100542330626

PLAN REVIEW

322.08

USD

The Refund Lines grid displays the items included as part of the refund. You can select a refund to view additional details on the Refund Detail modal page.

Processing Refunds

1. Select **Billing and Payment > Refund History** in the navigator.
2. Select a refund with a **Refund Status** of *Pending*.

3. On the Refund Detail page, select a **Refund Method**.

Select *Offline* if you are issuing a manual check for the refund, or issuing an electronic refund through a system that is not connected to Oracle Permitting and Licensing. This is the only option available for payments that were made by check or cash.

Select *Credit Card* to credit the refund back to the credit card that was used to make the payment.

Refunds to credit cards are processed through Oracle Fusion Payments. For detailed information on setting up the integration with Oracle Fusion Payments, see [Oracle Permitting and Licensing: Financial Integrations](#).

Note: Agency Staff processing refunds must have the Process Refunds Job Role (ORA_PSC_PUBLIC_SECTOR_REFUND_ADMINISTRATOR_JOB) assigned to them. Agency Staff processing refunds charged back to credit cards must have the Accounts Receivable Manager Segregated Role (ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_SOD_JOB) assigned to them. For more information on assigning roles to agency staff, see [Setting Up Agency Staff](#).

4. Click **Process Refund**.

You are returned to the Refund History page. The process changes the **Refund Status** of the refund to *Refunded* and enters the date and time that the refund was processed in the **Refund Processed Date** column. In addition, the process creates an accounting entry for the refund.

If you configure a template for the delivered Refund Notice communication event, processing the refund triggers the generation of a communication to the refund recipient. For more information on communication event templates, see [Setting Up Communication Templates](#).

Note: If an error occurs before or after a refund is process, the system changes its status to *Failed*. To prevent duplicate refunds from being processed agency staff cannot process a failed refund. You must set the refund status back to *Pending* through a patch request before attempting to process the refund again.

You can process multiple partial refunds to credit or debit cards. Note the following for reconciliation purposes:

- The first refund (partial or full refund of the settlement amount) is posted as follow-on credit to the original settlement transaction in CyberSource.
- Subsequent partial refunds are posted as stand-alone credits in CyberSource.

Voiding Refunds

You can void refund requests that were made in error, or for the wrong amount.

1. Select **Billing and Payment > Refund History** in the navigator.
2. Select a refund with a **Refund Status** of *Pending*.
3. Click **Void Refund**.

You are returned to the Refund History page. The process changes the **Refund Status** of the refund to *Viod* and enters the date and time that the refund was processed in the **Refund Processed Date** column.

Printing Refunds

1. Select **Billing and Payment > Refund History** in the navigator.
2. Select a refund with a **Refund Status** of *Refunded*.
3. On the Refund Detail page, click **Print Refund** generate a printable file for the refund in a separate browser tab.

Viewing Payments On Account

Agency staff can view payments on account on the Payments on Account page.

The enhanced user experience is now available for the Payments On Account page. The enhanced user experience streamlines the look and feel of this page.

This example shows the Payments On Account page.

ORACLE

Payments on Account

Q

On Account... Unapplied X

Search

2 items

On Account Reference ID	Payment Reference ID	On Account Status	On Account Date	On Account Amount	Currency
UNAP_20250108T0531530000Z5433E	UNAP_20250108T0531530000Z7576E	Unapplied	1/8/25	597.64	USD
OVPY_20250107T0938110000Z5982E	CASH_20250107T093742472Z762394	Unapplied	1/7/25	20.00	USD

Reviewing and Refunding Payments on Account

1. Select **Billing and Payment > Payments on Account** in the navigator.

The Payment on Account page displays all of the payments on account resulting from cash drawer overpayments. You can search for and sort the payments by:

- On Account Reference ID
- Payer First Name
- Payer Last Name
- Payment Transaction ID
- On Account Date
- On Account Amount
- Currency
- On Account Status

- 2. Select a payment on account to view additional details on the Payment on Account Details page.

This example shows the Payment On Account Details page.

ORACLE

Payment on Account Details

CancelInitiate Refund

On Account Reference ID OVPPY_20250125T21106000022709E	On Account Status Unapplied	Payment Reference ID CASH_1737859402332
On Account Date 1/25/25	Payment Transaction ID CASH_1737859402332	Amount Paid 400.00
Payer First Name Peter	Amount Due 200.00	Payer Last Name Skate
On Account Amount 200.00	Email amend@xyz.com	On Account Credit 200.00
Payment Instrument Date 1/25/25	Payment Method Check	Payment Instrument Number 300100626648659
Refund Amount	On Account Source Excess Payment	Refund Status
Unapplied No	Credit Applied No	

- 3. If the payment on account hasn't been refunded yet, the **Initiate Refund** button is available. Click it to initiate a refund for the overpayment. The **Refund Status** changes to *Pending*.
- 4. Access the Refund History page to process the pending refund. For more information, see *Viewing and Processing Refunds*.
- 5. Confirm that the payment's **On Account Status** shows as *Refunded* on the Payments on Account page.

Invoicing Fees and Fines

Run the Invoice Fees and Fines process to invoice fees assessed and due to Oracle Fusion Receivables.

Integration with Oracle Receivables enables you to invoice Permits, and Planning and Zoning fees that are due after an application is submitted.

After you have enabled Oracle Fusion Receivables:

- Fees assessed and due after an application is submitted can be invoiced to Oracle Fusion Receivables using the Invoice Fees and Fines scheduled process.
- A standard credit memo can be created in Oracle Fusion Receivables using the Invoice Fees and Fines scheduled process if a fee is adjusted after it has been invoiced.
- An on-account credit memo can be created in Oracle Fusion Receivables using the Invoice Fees and Fines scheduled process if a refund needs to be issued after an invoice is paid.
- Invoice Fees and Fines will create a separate invoice for each Permit and Planning and Zoning application during each run. The Invoice Fees and Fines scheduled process populates the receivables interface tables and calls the Oracle Fusion Receivables AutoInvoice scheduled process.
- During the AutoInvoice import, records that pass validation are transferred to the Receivables transaction tables.
- Records that fail validation will remain in the AutoInvoice interface as errors.
- You must use Manage AutoInvoice Lines to correct error records.

For more information about using AutoInvoice, see *Using Receivables Credit to Cash, Manage AutoInvoice, How You Correct AutoInvoice Errors*. Additionally see *How to Correct Errors on the AutoInvoice Interface Lines using ADFDI Template* on My Oracle Support Doc ID 1910185.1.

Syncing Invoice Statuses

Run the Sync Invoice Status process to sync payments received in Oracle Fusion Receivables with Permits, and Planning and Zoning.

Integration with Oracle Receivables enables agencies to process invoices when payments are made for fees in Permits or Planning and Zoning.

After you have enabled Oracle Fusion Receivables:

- Payments received in Oracle Fusion Receivables for Permits and Planning and Zoning invoices can be synced to Permits and Planning and Zoning using the Sync Invoice Status scheduled process.
- Adjustments, credits and discounts applied to invoices in Oracle Fusion Receivables for Permits and Planning and Zoning applications can be synced to Permits and Planning and Zoning using the Sync Invoice Status scheduled process.

The Sync Invoice Status process updates the fee records with the appropriate value for the fee status and creates fee records for receivable adjustments, credits, and discounts.

Note: The process does not track balance due for each fee record if an invoice is paid partially. To keep the balances in sync between Oracle Fusion Receivables and Permits and Planning and Zoning, you should run the Sync Invoice Status at frequent intervals.

Creating Oracle Receivable Receipts

Run the Create Oracle Receivables Receipts process to generate standard receipts in Oracle Receivables for invoice payments received in Oracle Permits, and Planning and Zoning.

Here are some prerequisites:

- A billing account must be established for all applications associated with a payment.
- Invoices must be created for all fees associated with a payment.
- Agency receivables receipt options must be configured.

The Create Oracle Receivables Receipts process allocates the payment to each invoice associated with the payment, creates a separate standard receipt for each invoice, and applies the receipt to the invoice.

If there's a problem with your integration setup, the Create Oracle Receivables Receipt process marks the payment with a receivables receipt status of Error. After you correct the source of the error, you can run the process again.

Run the process by accessing Process Monitor.

To initiate the process, access the Create Oracle Receivable Receipt page by:

- Selecting **Billing and Payment > Oracle Receivables Receipt** in the navigator.
- Clicking **Schedule New Process** in the Process Monitor, and selecting *Create Oracle Receivable Receipt*.

Scheduling the Process

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

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

Page Element	Description
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</i> or <i>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> <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>
By date	<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>

Page Element	Description
Month	Select the months in which you want your process to run. Note: This option and its associated fields are available only if you select a process frequency of <i>Yearly</i> .

Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- On success
- On error
- On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

Reconciling Orphaned Payments

Reconcile orphaned payments at scheduled intervals using the Sync Card Payment Status process.

An orphaned payment is a payment that has been processed by a payment gateway, but not recorded in Permitting and Licensing.

The Sync Card Payment Status process reads orphaned transactions from the checkout table, calls the Fusion Payments API to get the status from the payment gateway, and invokes a payment response for all those transactions.

To initiate the process, access the Sync Card Payment Status page by:

- Selecting **Billing and Payment > Sync Card Payment Status** in the navigator.
- Clicking **Schedule New Process** in the Process Monitor, and selecting *Sync Card Payment Status*.

Scheduling the Process

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

Page Element	Description
Frequency	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> ○ <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	Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.

Page Element	Description
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Month	<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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1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- On success
- On error
- On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

Processing Returned Checks

Use the Cash Drawer Payment History page to reverse a payment associated with a returned check.

Reversing or Voiding Payments

1. Select **Billing and Payment > Cash Drawer Payment History** page in the navigator.
2. Search for the check number and select it to view the Cash Drawer Payment Detail page.
3. Click the **Reverse Payment** button.
4. In the **Reverse Payment** modal window, select a **Reversal Reason** and specify if a returned check fee should be charged.
5. Click **Submit**.

Note: If agency payment options are configured to re-instate fees, then agency staff will see the Reverse Payment button on the Cash Drawer Payment History page. If agency payment options are configured to not re-instate fees, then agency staff will see a Void Payment button on the Cash Drawer Payment History page.

The following activities happen when agency staff reverses a payment for a check return:

- The original fee paid rows are reversed and new fee rows are created with a due status.
- A fee record is created for the returned check fee amount.
- A recovery fee record is created if the overpayment associated with the payment has been refunded. This is to recover the funds.
- A refund for an overpayment amount is voided if it is initiated, but not yet processed when the associated payment is reversed.
- The original payment record is reversed.

The following activity happens when agency staff void a payment for a check return:

- The original payment record is marked as void.

For more information, see [Setting Up Agency Payment Options](#).

Reversing Payment Application Errors

Agency staff may accidentally record a payment against the wrong permit, planning application or business license.

Agency staff can now recover from such mistakes by unapplying a payment for a permit, planning application or business license. When Agency Staff unapply the payment, the system will:

- Create an On-Account Receipt.
- Re-instate the fee for the un-applied permit, planning application or business license.

Agency Staff can either refund the on-account receipt or apply the on-account receipt to pay fees for a different permit, planning application or business license.

Agency staff can unapply payments using the **Unapply Payment** button on the **Payment History Details** page.

The agency needs to configure a reversal reason. For more information, see [Setting Up Agency Payment Options](#).

Additionally, the agency needs to configure journal line rules for the event type Fee Payments Unapplied. For more information, see [Selecting an Accounting Framework](#).

Correcting Payment Application Errors

1. Select **Billing and Payment > Payment History** page in the navigator.
2. On the **Payment History** page, click the transaction you want to reverse.
3. Click the **Unapply Payment** button.
4. On the **Fees to Unapply** modal window, choose a **Reversal Reason**, and click **Submit**.

Reversing or Voiding Offline Payments

Agency staff may need to void or reverse offline payments.

Use the Payment History page to void or reverse an offline payment.

Reversing or Voiding Offline Payments

1. Select **Billing and Payment > Payment History** page in the navigator.
2. Search for the offline payment and click it to view the Payment History Details page.
3. Click **Actions** and choose **Reverse Payment**.
4. On the **Reverse payment** drawer, choose a **Reversal Reason** and turn on the **Add Return Check Fee** switch to specify whether a returned check fee should be charged.
5. Click **Submit**.

If agency payment options are configured to reinstate fees, then agency staff see the *Reverse Payment* option in the **Actions** menu on the Payment History page.

If agency payment options are configured to not reinstate fees, then agency staff see a *Void Payment* option in the **Actions** menu on the Payment History page.

The following activities happen when agency staff reverses an offline payment:

- The original fee paid rows are reversed and new fee rows are created with a due status.
- A fee record is created for the returned check fee amount.
- The original payment record is reversed.

When agency staff voids an offline payment, the original payment record is marked as void.

For more information, see *Setting Up Agency Payment Options*.

Voiding Checkouts

Sometimes payment gateways provide a response that cannot be interpreted as fee paid or fee unpaid, for example: "HTTP 400 Bad Request: The payment system failed to provide a valid response."

In such cases OPAL will not reset the fee status to due. Agency staff will have to manually void checkout data to reset fees to due. This action cannot be reversed, so agency staff should make attempts to reconcile payments online or by using the Oracle Enterprise Scheduler (ESS) payment sync job first.

Managing Checkout Transactions

1. Select **Billing and Payment > Manage Checkout Transactions** page in the navigator.
2. Search for the checkout transaction and select it to view the **Checkout Details** page.
3. Click the **Void Checkout** button. You will get a message that this action will delete the checkout data and reset the associated fees back to due. This action cannot be reversed.
4. Click **OK** to continue.

17 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.

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. 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
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> <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>
By date	<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>
Month	<p>Select the months in which you want your process to run.</p> <p>Note: This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.

4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- On success
- On error
- On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

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

Viewing Accounting Transactions

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

Each accounting transaction has one of the following statuses:

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

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

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

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 <i>Setting Up Data Format Exchange Maps</i> .
All Open Periods	Select to include journals for all open accounting periods.
Specify Dates	Select to include journals for a specific accounting date range.
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
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Page Element	Description
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3. Click **Add**.
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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](#).

18 Working with Deposit Accounts

Depositing Funds

Agency staff and authorized users can track funds deposited into a deposit account.

Agency staff with the manage deposit account privilege can record deposits received into a deposit account.

Authorized users with access to deposit can make deposits into a deposit account.

If checks are returned for lack of funds, agency staff with the manage account privilege can reverse the deposit recorded for a deposit account.

Adding Funds to a Deposit Account

1. Select **Billing and Payment > Deposit Accounts**.
2. Click a row on the Deposit Account page.
3. Click the Deposits and Charges tab.
4. Click the **Add Deposit** button, enter the deposit amount, and select an **Authorized User**.
5. Click **Submit**.
6. Select the payment method and continue to complete the payment.

Reversing Funds

1. Select **Billing and Payment > Deposit Accounts**.
2. Click a row on the Deposit Account page.
3. Click the Deposits and Charges tab.
4. Click the row for the deposit to reverse.
5. Click **Reverse Deposit** select a reversal reason, and submit the reversal request.

Importing Electronic Deposits

This feature provides an integration with Oracle Financials Cash Management and enables agency staff to import deposits received in the form automated clearing house (ACH) and wires and recorded in Oracle Financials Cash Management.

Use the scheduled process, Import Electronic Deposits for Deposit Accounts, to import automated clearing house ACH and wire deposits from Oracle Financials Cash Management.

For more information, see [Using the Process Monitor](#).

To import deposit activity from Oracle Financials, you have to:

- Configure a Cash Management lookup code. Add a lookup code 'TRSA' for the lookup type CE_TRX_TYPE. To add the lookup code 'TRSA' agency staff use the Manage Cash Management Lookups task under the Cash Management and Banking functional area in the Financials Setup menu.
- Link the Oracle Financials Cash Management bank account to a deposit account in the Funding and Security section of the Deposit Account Information page. For more information, see [Setting Up Deposit Accounts](#).
- Create an External Transaction in Oracle Financials Cash Management with a Transaction Type value of TRSA.

- Populate the deposit account number in the reconciliation reference field of the Bank Statement Line in Oracle Financials Cash Management.
- Reconcile the External Transaction and Bank Statement Line in Oracle Cash Management on a One to One (1-1) basis.

After you run the import, you can review the deposit on the Deposit Account Activity page for each deposit account.

Paying Fees

Agency staff can pay fees with funds in a deposit account.

Applicants, primary contacts, or just contacts can pay fees with funds in a deposit account if they are authorized users on the deposit account and have access to pay fees.

For more information, see *Working with Fees and Payments*.

Running Autopay to Pay Fees with Deposit Account Funds

You can set up a process to record fee payments for deposit accounts.

1. Select **Billing and Payment > Deposit Account Autopay Fees**.
2. On the Parameters tab, confirm that **All Deposit Accounts** is selected and click **Submit**.

Note: The Autopay Fees with Deposit Account process was enhanced to evaluate if the prevent payment condition exists to determine fee payments made using deposit accounts. If the condition to prevent a payment is applied, the Autopay process will not process the payment of those fees using deposit accounts.

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

Reversing Fees

You can reverse fees that have been paid with funds in a deposit account.

1. Select **Billing and Payment > Deposit Accounts**.
2. Click a row on the Deposit Account page.
3. On the **Deposits and Charges** tab, click **Reverse Fee**.
4. Select one or more fee items and click **Submit Reversal**. If you want to reverse fee items associated with a Payment Reference ID, search for that Payment Reference ID the before selecting the fee items.
5. Select a reason for the reversal and click **Submit**.

Viewing Fees that are Payable by Authorized Users

This page lists the fees that can be paid by each authorized user with the balance in the trust account.

1. Select **Billing and Payment > Deposit Accounts**.
2. Click the **Fees Payable** tab in the left navigation to see the list of fees.

Working with Bank Transfers

An agency may hold funds received for trusts/escrows/bonds in a separate bank account without co-mingling the funds with operational funds. When the agency has incurred a cost, it will communicate to the developer/contractor of its intent to use the funds in trust/escrow/bond and specify the amount and purpose of use. An agency will become the owner of the monies held in trust/escrow/bonds and the developer/contractor relinquishes all legal and equitable interest for such amount immediately or after a stipulated period of time. In such events, the agency may move money from the bank account that holds deposit account funds to the bank account that holds the agency's operational funds for fees charged to the deposit account. This feature provides integration with Oracle Financials Cash Management and enables agency staff to create bank transfers to move monies.

Bank Transfers is an optional feature and can only be used if you have:

1. Implemented Oracle Financials Cash Management.
2. Configured bank accounts, business units, payment methods, and payment profiles in Oracle Financials Cash Management.
3. Linked the Oracle Financials Cash Management bank account to a deposit account in the Funding and Security section of the Deposit Account Information page. For more information, see [Setting Up Deposit Accounts](#).

Submitting Bank Transfers

Here's how to submit a bank transfer.

1. Select **Billing and Payment > Bank Transfers**.
2. On the Bank Transfers page, review the withdraw amount column to see if there are funds eligible to transfer.
3. Click a row to review the withdraw amount by deposit account.
4. Click **Select Multiple** and choose the rows for which you want to submit the bank transfer.
5. Click the **Bank Transfer** button.
6. In the modal window, populate the destination bank account, business unit, payment method, payment profile and submit the bank transfer.

Note: Agency staff submitting the bank transfer should be aware of the payment methods and payment profiles associated with the bank account. Choosing incorrect values will result in a validation error.

Refunding Account Balances and Fees

Agency staff can initiate refunds for balances in deposit accounts from the Deposit Accounts page for the full amount or a partial amount.

Note: Agency staff must ensure that all applicable fees have been charged to the deposit account before issuing a full refund of the account balance.

Agency staff can initiate fee refunds back to the deposit account from the Fees and Payments page on a Permit or planning application transaction.

Agency staff can also void a refund if the refund has been initiated incorrectly.

Refunding Deposit Account Balances

1. Select **Billing and Payment > Deposit Accounts**.
2. Click a row on the Deposit Account page.
3. Click the **Deposits and Charges** tab.
4. Click **Initiate Refund**, enter the Refund Amount and click **Initiate Refund**.

Refunding Fees Back to a Deposit Account

When there is a downward adjustment of a fee after it has been paid with funds in a deposit account, agency staff can refund the excess fee payment to the deposit account.

You can initiate refunds of fees from the permit or planning application on the Fees and Payments page in the application details. Agency staff can:

- Manually choose the amount to refund or run the recalculation process to create a downward adjustment.
- Access the Refund History page and process the refund to refund it to the deposit account.
- View the fee refund on the Deposits and Charges tab of the Deposit Account page.

For more information, see [Setting Up Deposit Accounts](#) and [Working with Fees and Payments](#)

Printing Deposit Account Statements

You can print an account statement for a deposit account.

To print deposit account statements, agency staff has to configure following parameters for the Report ID DepositAccountStatement001:

- Parameter ID: 1
Parameter Name: P_DEPOSIT_ACCOUNT_NUMBER
Parameter Data Type: String
- Parameter ID: 2
Parameter Name: P_TRANSACTION_DATE_FROM
Parameter Data Type: Date
- Parameter ID: 3
Parameter Name: P_TRANSACTION_DATE_TO
Parameter Data Type: Date

For more information about configuring report parameters, see [Setting Up Reports](#)

You print account statements from the Deposit Account page.

1. Select **Billing and Payment > Deposit Accounts**.
2. On the Deposit Accounts page, click Account Information in the left hand navigation.

3. Click **Print** and enter the **Statement Period**.
4. Click **Done**. The generated deposit account statement file opens in a separate browser tab.

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


19 Working with Processes


Using the Process Monitor





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

This example shows the Process Monitor page.

Process Monitor

[Schedule New Process](#) 

 Last 12 hours ▾

Name	Process ID	Status	Submitted By	Submission Time	Scheduled Time	Actions
Export Journals to ERP	14336	Running	SYSTEM_ADMIN	5/8/19 3:08 PM PDT	5/8/19 3:08 PM PDT	 
Generate Accounting	14306	Succeeded	SYSTEM_ADMIN	5/8/19 3:01 PM PDT	5/8/19 3:01 PM PDT	 

Scheduling a New Process

1. Select **Common > Process Monitor**.
2. On the Process Monitor page, click **Schedule New Process**.
3. On the Schedule New Process page, select the process you want to run in the **Name** field. A description of the selected process appears in the **Description** field.
4. Click **Yes** to access the page associated with the process you selected. For example, if you select the *Generate Accounting* process, clicking the **Yes** button accesses the Generate Accounting page.
5. Enter parameters for the process and click **Submit**.

Note: Processes can be run immediately or scheduled to run at a specific time. If you want to schedule a recurring process beyond 20 years into the future, the **End Date** must have a four-digit year. This requires updating the date format defined in the regional preferences. From the account menu, select **My Preferences**, click **View Advanced Preferences**, and select **Regional**. On the General Preferences: Regional page, you can update the **Date Format** to use a four-digit year.

6. Click the **Process Monitor** link to view the progress of the process on the Process Monitor page.
7. Click **Refresh** to view the current status of all processes listed in the Process Monitor.

Managing Processes

Select **Common > Process Monitor**.

The Process Monitor page displays information for each process in the following sortable columns:

- **Name**
- **Process ID**
- **Status**
- **Submitted By**
- **Submission Time**
- **Scheduled Time**

Note: The **Submission Time** and **Scheduled Time** columns use the time zone specified in the user's preferences, not the time zone for the agency.

Click **Filter By** to filter the displayed process information by *Name*, *Process*, and *Submission Time*.

You can manage processes using the following page elements:

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

20 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.

Permit Number RESADD-2020-00068 Apply

Building Permit Template...

CITY OF INNOVATION
Building Department

Building Permit

Permit Number	RESADD-2020-00068	Issued On	Nov 24, 2021
Parcel Number	71-237-5	Reissued On	Nov 24, 2022
Work Description	Add Porch	Expires On	May 19, 2024
Owner		Address	1217 N WALNUT ST W ALAMEDA California 94501
		Contractor	Brandon Wood 1217 Walnut St Alameda California 94501
Total Fees Paid	320 USD		

Permit must be displayed on job site at all times. Plans must be kept on site during construction. Any deviation from approved plans must be approved by the building department.

Expiration This permit will expire in 180 days from the date of issue without approval of a required inspection or if 180 days lapse between approved required inspections. If the permit expires before work is completed and inspected, no additional work shall be performed until a new permit is obtained. Under state law, work that is not inspected is a property defect and must be disclosed to the next owner prior to transfer of title.

Extension Prior to permit expiration and upon written request, a one-time extension, not to exceed 180 days, may be granted.

View Report

- HTML
- PDF
- RTF
- Excel (*.xlsx)
- PowerPoint (*.pptx)
- Data

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, PowerPoint or CSV. 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.

21 Using the Digital Assistant

Overview of Digital Assistant

Create your own digital assistant from scratch using your Oracle Digital Assistant instance and configure its parameters to suit your requirement before making it available for your users.

Create and add skills to your digital assistant. You can also use the Oracle delivered sample skills and re-configure its parameters, or clone the skill for the digital assistant you create.

Enable your digital assistant to provide generic information about processes or answer specific questions about your offerings, and enlist your own set of frequently asked question with answers.

Asking Details

The delivered digital assistant skills, for example, facilitates responses and recommendations to questions raised by an anonymous user regarding the permitting process:

- With the PERMIT SEARCH skill, the digital assistant can access information from the Permit implementation and list the permits that match one of the search parameters – *Permit Number*, *Parcel ID*, and *Street*. Users can also review the permit detail page, if they want to look into a permit they just searched.
- With the PERMIT RECOMMENDATIONS skill, the digital assistant can access information from Oracle Intelligent Advisor and list permit recommendations. The skill prompts the user with questions from the Oracle Intelligent Advisor questionnaire and retrieves a list of recommended permits based on the user's responses to the questions.

For details on configuring your digital assistant for use, such as intents and the dialog flow, see the documentation [Configure for Use in a Digital Assistant](#).

Asking Questions

Your digital assistant can store a list of questions and answers to be available as Frequently Asked Questions (FAQs) regarding the processes your agency follows.

The content for the FAQs are entered in a spreadsheet and attached to the digital assistant. The Oracle delivered spreadsheet can be updated with information from your knowledge-base.

For details on configuring your digital assistant to add questions and answers, see the documentation on [Q&A](#).

22 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 checkbox• 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

Search...

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)

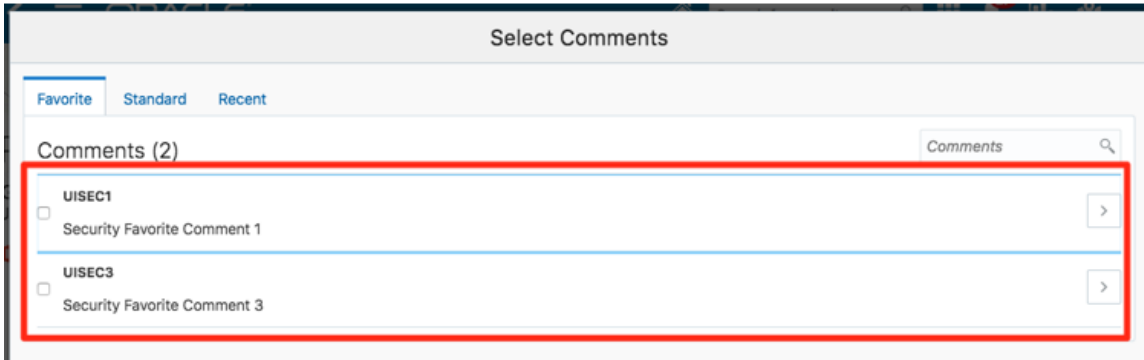
1
2
3
4
5
...
22

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.



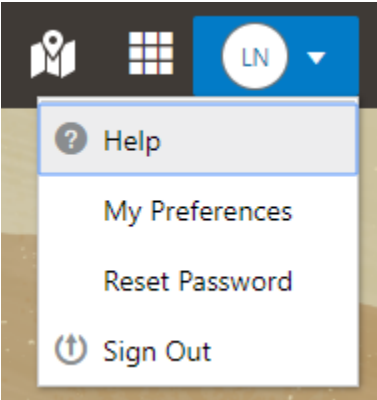
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the 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

7/9/18



Valid to Date

<

July

2018

>

Public User Enabled

* Department

1

Workflow Space Name

9

Workflow Application ID

2

3

4

5

6

7

8

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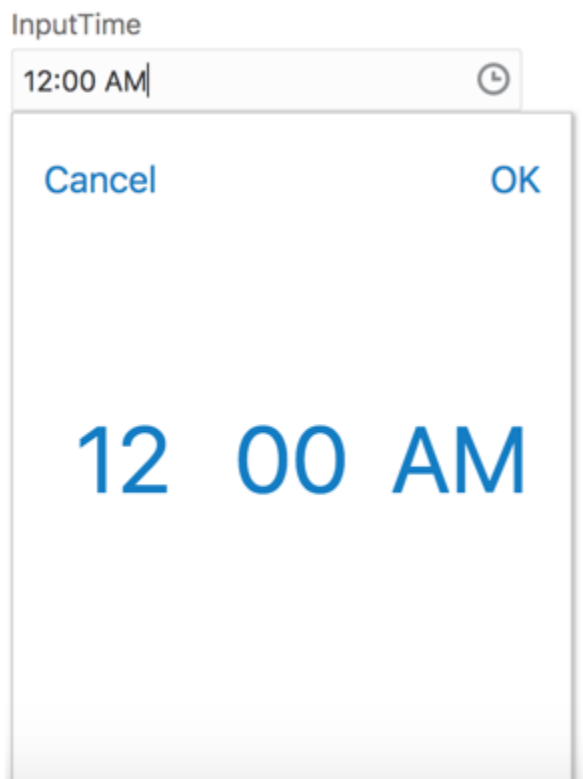
31

Today

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.

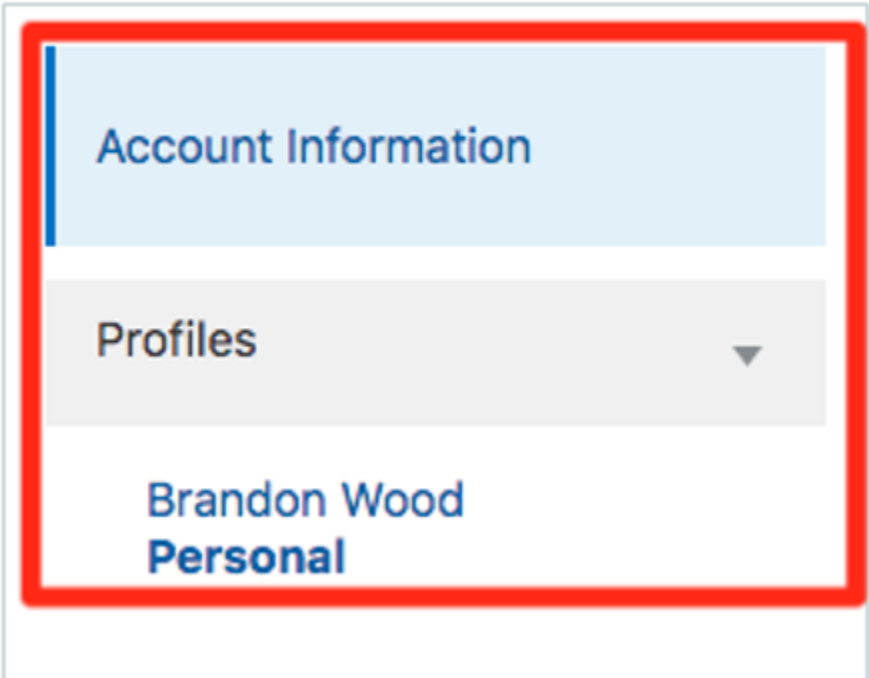
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift+Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move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