

# Oracle Public Sector Permitting and Licensing

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**Using Community Development  
Permits**

26C



Oracle Public Sector Permitting and Licensing  
Using Community Development Permits

26C

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Author: Oracle Permitting and Licensing User Assistance

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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 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.

## Share Your Feedback

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

You can email your feedback to [oracle\\_fusion\\_applications\\_help\\_ww\\_grp@oracle.com](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).

Thanks for helping us improve our user assistance!



# 2 Managing Public Users

## The Public User Registration Process

Although anonymous users can access information that is available to the general public, they must 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
<b>Hide contact information from public view</b>	<p>Turn on the switch to hide the registrant's name and contact information when a member of the public views their applications.</p> <p>This switch appears only if enabled by the agency on the Public User Setup page. It's turned on by default to hide the registrant's contact information from public view.</p> <p><b>Note:</b> Even when the registrant's own information is hidden, the property addresses for all applications are visible to the public.</p>

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

Here's how to add or update information.

Page Element	Description
<b>Name</b>	<p>Click the <b>Name details</b> pencil button to open the <b>Name details</b> drawer.</p> <p>Update fields including first, middle, and last names, initials, suffix, and title. The <b>Display Name</b> is generated from the name fields.</p> <p>Turn on the <b>Hide contact information from public view</b> 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>
<b>Access</b>	<p>Click the <b>Access details</b> pencil icon to open the <b>Access details</b> drawer.</p> <p>Enter a number in the <b>IVR access code</b> field. The <b>User Name</b> and <b>Email</b> fields are display-only and reflect the email address entered during the registration process.</p>
<b>Business information</b>	<p>Click the <b>Business information details</b> pencil icon to open the <b>Business information details</b> drawer.</p> <p>Enter a business name and business title.</p>
<b>Address</b>	<p>Click the <b>Add Address</b> button to enter a home or business address. Turn on the <b>Default</b> switch to designate the address as the default selection.</p> <p>Click the row to update the address.</p>
<b>Phone</b>	<p>Click the <b>Add Phone</b> button to enter a phone number. Select the phone type by clicking <b>Mobile</b>, <b>Work</b>, or <b>Home</b>. 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 <b>Default</b> switch to designate the phone number as the default selection.</p> <p>Click the row to update the phone.</p>
<b>Email</b>	<p>Click the <b>Add Email</b> button to enter a home or work email address. Turn on the <b>Default</b> switch to designate the email address as the default selection.</p> <p>Click the row to update the email.</p>

Page Element	Description
<p><b>Contacts</b></p>	<p>Contacts are people who can interact with the agency regarding business related to the associated account.</p> <p>Click the <b>Add Contact</b> button to enter information for an account contact, including name, business, email, street address, and phone.</p> <p><b>Note:</b> 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 <i>Working with Application Contacts</i>.</p> <p>Click the row to update a contact.</p>
<p><b>Conditions</b></p>	<p>View conditions that have been applied to the person with the associated account. Only agency staff can apply and resolve conditions.</p> <p>Click the row to view the conditions.</p> <p>Agency staff can add or resolve conditions by clicking the <b>Conditions</b> pencil icon to open the Conditions page.</p> <p>For information about adding and managing conditions, see <i>Managing Account Conditions</i>.</p>
<p><b>Attachments</b></p>	<p>View and upload files as attachments to the account.</p> <p>Your agency controls whether attachments can be added to accounts on the Public User Setup page.</p> <p>Click the row to view the attachment.</p> <p>For information about adding and managing attachments, see <i>Working with Application Attachments</i>.</p>
<p><b>Terms of use</b></p>	<p>Click the terms of use link to review the terms and conditions that the registrant accepted.</p> <p>For more information, see <i>Setting Up Terms of Use</i>.</p>

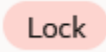
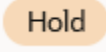
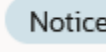
- To delete an item, click the **Delete** trash can icon.

## 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:

- 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.
- 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.
- 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.

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

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

- For each condition in the list, review the severity badge, name and description of the condition, priority, and when the condition was applied.
- Click the **Resolve** button to add a resolution action and close the condition.
- 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:

- Access the Manage Account page.
- On the Manage Account page, go to the **Conditions** section.
- As agency staff, you can click the **Conditions** pencil icon button to open the account's Conditions page, where you can apply conditions.
- Click the **Add (+)** button.
- 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>

Page Element	Description
<b>Display Message</b>	Displays an informational message that also appears in the list of conditions for an account.
<b>Severity</b>	<p>Displays the severity of the selected condition:</p> <ul style="list-style-type: none"> <li>○ <i>Lock</i>: Suspends all operations and selects all condition rules for the condition.</li> <li>○ <i>Hold</i>: Enables agency staff to select the rules that apply to the condition.</li> <li>○ <i>Notice</i>: Functions as an alert and has no effect on operations.</li> </ul>
<b>Condition Rules</b>	<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 <b>Apply Conditions to Transactions</b> switch is turned on, except for <b>Prevent Application Progress</b> which is always visible.</p> <p>You must select at least condition rule:</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Application Progress</b></li> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b></li> <li>○ <b>Prevent Inspection Result</b></li> <li>○ <b>Prevent Final Inspection</b></li> </ul> <p>The condition rules for inspections are only applicable to permits and business licenses with inspections.</p>
<b>Priority</b>	Select <i>High</i> , <i>Medium</i> , or <i>Low</i> . The priority is informational only.
<b>Description</b>	The default description comes from the agency's condition definition, but you can change this description as needed.
<b>Additional Information</b>	Enter any additional information or notes regarding the condition that you're applying.

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

Page Element	Description
<b>Apply Condition to Transactions</b>	<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 <b>Condition Rules</b> section of the page. If the severity is <i>Hold</i>, you can accept the default selections or select which condition rules to apply.</p> <p>If this switch is off, the only relevant condition rule (and the only visible condition rule checkbox) is <b>Prevent Application Progress</b>.</p> <p>The default setting for this switch comes from the condition definition, but you can change the setting.</p>
<b>Include in-process transactions</b>	Available only if the <b>Apply Condition to Transactions</b> switch is turned on. Turn on this switch to apply the condition to all active applications for this account.
<b>View Impacted Transactions</b>	Click this button to view a list of the in-process applications that will be affected by the condition if you turn on the <b>Include in-process transactions</b> 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
<b>Resolution Action</b>	Enter a description of how the condition was resolved.
<b>Resolve conditions applied to transactions</b>	Turn on this switch to resolve the condition that was applied automatically to the transactions when the account condition was created.

Page Element	Description
	You turn off the switch if you want to resolve this condition alone, without affecting the transactions associated with the account.
<b>View Impacted Transactions</b>	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.

Both guest and registered public users can search for a parcel on the map. When available, the search returns the parcel along with a link to any related transactions associated with it. Click the related transactions link to access the **Location Information** drawer. This lists all the related transactions associated with the selected location, such as permit, planning or business license applications, projects, and code enforcement incidents or cases.

**Note:** Public users (both guest and registered) do not have access to view the details in the Code Enforcement tab. In addition, the guest users do not have access to the Business Licenses tab.

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.

**ORACLE**

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 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

Alameda

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](#).

For information on setting up AI Agents, see [Understanding AI Agent Studio](#) and [Delivered AI Agents](#).

## Action Tiles for the Anonymous User

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 or starting a chat session using the AI Assist feature, depending on the agency's use of AI functionality.

**Note:** The agency must enable the Redwood interface to use the AI Assist feature.

The anonymous user landing page includes these tiles, depending on your agency's setup:

Actions	Description
<b>Public Reports</b>	Provides access to all public reports available for the anonymous user only.
<b>Estimate Fees</b>	Provides access to the Estimate Fees page, where an anonymous user can choose an application type and estimate fees for an application.  This action tile is also available on the public landing page after logging in.
<b>Explore Your City</b>	Provides access to a map where the anonymous user can search for and view property details, including applications related to the property.  This action tile is also available on the public landing page after logging in.
<b>Report an Issue</b>	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.  This action tile is also available on the public landing page after logging in.  See <a href="#">Reporting Issues</a> .
<b>Make CE Payments</b>	If you click the tile to make a Code Enforcement payment as an anonymous user, you are prompted to sign in. Once signed in, you can make online payments for code enforcement fees.  This action tile is also available on the public landing page after logging in.  See <a href="#">Making Code Enforcement Payments</a>

## Using Quick Links

Click the **Quick links** button to open a drawer with available links to common activities, including:

- **Start an Application**
- **Estimate Fees**
- **Go to Applications**
- **View Recommendations**
- **Request Inspections**
- **Report an Issue**
- **View Invoice History**
- **View Payment History**
- **View Payments on Account**

## Viewing the Registered User's Account Summary

Click the **Account summary** button to open a drawer with links to the logged in user's account information, including:

- **Applications**
- **Licenses**
- **Inspections**
- **Projects**
- **Businesses**

A count indicates how many items of that type are in the user's account information.

## More Action Tiles for Registered Users

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

## 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
<b>Make a Payment</b>	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.  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> .
<b>Failed Inspections</b>	Indicates that an active application has at least one failed inspection and no reinspections have been scheduled yet for the failed inspection.

Card	Description
	The <b>Reinspect</b> 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 <i>Reviewing Inspection Details</i> .



# 3 Applying for a Permit

## Security Details for Applying for a Permit

This topic describes important security roles, requirements, or considerations specific to applying for a permit.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Apply Permit	Submit a permit application.	PSC Registered Public User 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

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
<b>All Categories</b>	Enter the first characters of the application type in the <b>Search all application types</b> field.	All
<b>Recent and Popular</b>	Explore popular applications or those that you applied for recently.	Registered public users and agency staff
<b>Guide Recommendations</b>	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, that is, a user who hasn't signed in. A **How it works** banner at the top of the page provides 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 hasn't started looking for an application type.

**ORACLE** Sign In Register

## What would you like to apply for?

Search all application types

**How it works** Search application types or explore categories to start an application.

10 Items Sort By

- Business Coaching**  
The City and its partners offer coaching for new entrepreneurs and seasoned business...  
[Show More](#)  
Explore
- Business Licenses**  
We are excited to welcome your business venture to our city and stand ready to assi...  
[Show More](#)  
Explore
- Cannabis Licenses**  
To operate a cannabis business in the State, a person must obtain a cannabis license...  
[Show More](#)  
Explore
- Commercial Permits**  
Permit applications for all commercial properties that are making alterations,....  
[Show More](#)  
Explore
- Contractor Licenses**  
Use these applications to apply for contractor licenses.  
[Show More](#)  
Explore
- Discover What You Need**  
Not sure exactly what you need for your project? Schedule a pre-application meeti...  
[Show More](#)  
Explore
- Over-the-Counter Permit**  
Over-the-Counter (OTC) Permits are those...
- Residential Permits**  
These are the typical items that should be...
- Types of Land Use Application**  
Applicants for development projects and...

All Categories Recent and Popular Guide Recommendations

The descriptions of the categories and the application types come from the agency's 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 category card 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.

The screenshot shows the Oracle Public Sector Permitting and Licensing application interface. The main header is "ORACLE" in white on a dark background. Below it, the page title is "Over-the-Counter Permit" with a back arrow. A search bar contains the text "Search application types in Over-the-Counter Permit".

The main content area is divided into sections:

- How it works:** A section with a blue dot icon and the text "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:** A list of three permit types:
  - OTC Permit:** 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

At the bottom left, there are two navigation options: "All Categories" (represented by a grid icon) and "Recent and Popular" (represented by a clock icon).

On the right side, there is a sidebar titled "Application Details" which shows the selected "Residential Solar" permit type and its description: "Permits are required for all new solar installations, repairs or alterations to existing solar system." At the bottom of this sidebar are three buttons: "Cancel", "Estimate fees", and "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** button. 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 before signing in, click the **Apply** button.
- After signing in, click the **Apply** button on the applications list page.

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

## Searching for Application Types By Name

To search for an application type by name:

Sign in and click the **Apply** button. Click in the search field and enter the characters the application type or name begins with. For example, Permit.

You can sort the results using the **Sort By** drop-down list:

- Application Type
- Application Description

Click the application link to open the **Application details** drawer to view the application description. A **Show More** button might be available to provide 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.

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

## Searching for Popular and Recent Application Types

To search for popular and recent application types, click the **Recent and Popular** tab.

Review the list of popular and recently used application types. The list can include a mix of business license, permit, and planning application types.

Badge	Description
Recent	Indicates application types (up to 5) for the applications that the current user most recently submitted.
Popular	Indicates the application types (up to 5) that have been used most frequently in the past 30 days.

Badge	Description
	<p><b>Note:</b> Anonymous public users don't see the 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.

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

## Applying for Multiple Business Licenses Applications

When you are searching for Business Licenses applications, you have an option to apply for multiple applications at the same time. For more information, see [Setting Up Agency-Level Options for Business Licenses](#).

During the data entry, this allows you to enter common information for the selected applications together in a **General Information** section.

1. Select the checkboxes for the desired business licenses applications in the applications list.

**Note:** The order in which you select the checkboxes for the applications will be the order in which the data entry pages for the applications are displayed.

2. Click the application link to open the **Application details** drawer. Here, you can view more details about the application and when there are fees associated with the applications, you can 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. For details, see [Estimating Fees](#).
3. Click the **Apply** button.

When you are selecting multiple applications, click the **Apply** button on the upper right of the page. This **Apply** button at the top displays the number of applications you have selected to apply.

An **Apply for multiple applications** drawer opens which lists all the selected applications. Review the selection and use the delete icon to remove any application.

4. Use the **Continue** button to navigate to the data entry pages.

For information on filling out multiple applications, see [Completing a Single Application for Multiple License Types](#).

## Using a Guided Questionnaire for 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

## 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.

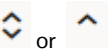
**Note:** Some fields are configured to be read-only and can't be updated.

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 <b>Delete</b> (garbage can icon) to remove the data in a row and <b>Edit</b> (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](#).

## Adding Multiple Applications to a Permit Application

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

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

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

## Residential Solar

# Primary SubApplication

## Primary and Subapplication

### Does your application require multiple permits?

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

- Yes
- No

### Select the application link type

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

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

- Primary
- Subapplication

### Link subapplications

Link

## Related Transactions

Use this section to link existing applications to the current application.

 You must save your application before linking transactions.

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

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

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

If available, you can use the Related Transactions section to link applications before submission, or subsequently access the submitted application and link existing or new applications or subapplications to it.

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

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

See [Linking Primary and Subapplications](#) and [Setting Up Contextual Help](#).

## Related Transactions

The Related Transaction section allows you to link your current application to other existing applications in the system. Click the **Link 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
4 | 6

## 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

2 Items
+ Download Delete
⬇️

	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



- Application Information
- Applicant Information
- Property Information
- Attachments
- Fee Summary
- Review

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

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](#).

## 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.
- 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.
- After application submittal in the application details, applicants and contacts with full access can make a contact inactive. Inactive contacts can't access the application.

## 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.

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](#).

## 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](#).

## 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.

## Submitting an Application

If you can't submit the application, your agency may have configured a Business Rules Framework event to automatically stop the submission process and display a message describing the reason for preventing application submittal.

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](#).

## Applying for a Permit Renewal

Agency staff and authorized registered public users can submit an online renewal application to renew an existing permit.

Agency staff and authorized registered public users can renew permits for the types of permits that are configured for renewals by the agency. You can begin the renewal application process for a permit which is about to expire or which had expired. A renewal application must be fully processed before you can start another renewal.

**Note:** Only the primary contact and contacts with full access to the permit can apply for a renewal. For details about contact types, see *Setting Up Contact Types* and *Working with Application Contacts*.

Here's the flow for renewing a permit from the Transactions page:

1. Navigate to **Permits > Permits** or click the **Permits** tile on the Agency Springboard.
2. On the Transactions page, find the permit, and from the **Actions** menu, click the **Renew** option. For permits that are about to expire and expired, you can also click the warning icon for expiration.
3. In the **Renew permit** drawer, click the **Renew** button to submit your application for permit renewal.

Once the renewal request is submitted, the Overview page displays the message that a renewal is in progress.

4. Agency staff accepts, reviews, and approves or denies the renewal application.

Here's the flow for renewing a permit from the Overview page:

1. Navigate to **Permits > Permits** or click the **Permits** tile on the Agency Springboard.
2. On the Transactions page, click the row for the selected permit to open the Overview page.
3. On the Overview page, you can renew a permit using any of the following ways:
  - o From the **Actions** menu, click the option **Renew**.
  - o In the **Permit information** section, click the **Renew** button.

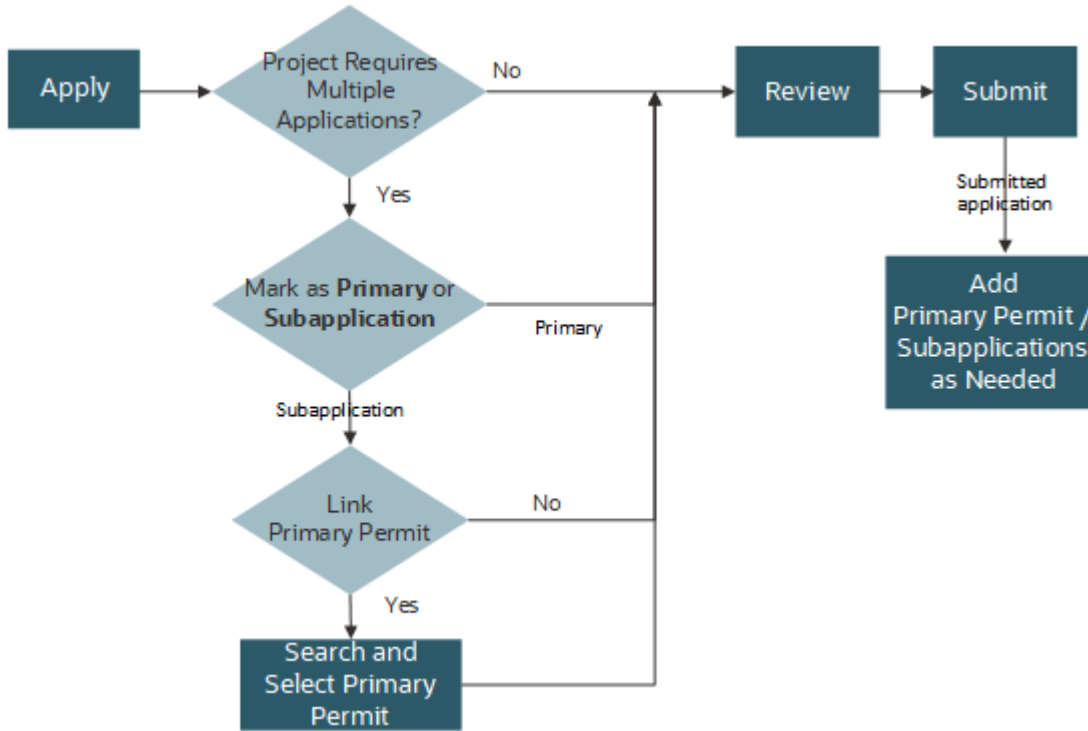
**Note:** If the permit already has a renewal in progress, the option to renew won't be available.

4. Agency staff accepts, reviews, and approves or denies the renewal application.

## Linking Primary and Subapplications

Applicants and agency staff can establish links between multiple subapplications and a primary permit application. You can link applications either at the time of filling out the intake form or link them after submitting the application. Linking applies to permit applications only.

The following diagram shows the process flow for filling out an intake form—with and without multiple permit applications:



## Linking Applications During Application Intake

When filling out a permit intake form, if your project requires multiple permits, you mark the current application as primary or subapplication. For details, see the section *Adding Multiple Applications to a Permit Application* in the topic *Completing an Application*.

## Working with Relationship Types

After the permit application is successfully submitted, applicants can access the submitted application from their applications list page and agency staff can access it from the agency Permit Applications page. You can link applications to your applications depending on whether your application type is independent, primary, or subapplication.

**Note:** The relationship type field is view-only for registered public users.

**Independent:** A permit application that is neither primary nor subapplication is an independent application. Agency staff must change the application type to primary or subapplication if they want to link applications to it. On the permit's Overview page the **Relationship Type** field shows *Independent*. To change the application type, click the **Update Relationship** button to open a drawer where you can select a different relationship type, including Primary or Subapplication.

**Primary:** The primary permit is the top-level permit. You can link one or more existing or new subapplications to the primary permit application like this:

Primary Permit	Update Relationship
Permit Applications list page	Click the <b>View Subapplications</b> link to see the options for linking existing applications and for creating and linking new subapplications. .

Primary Permit	Update Relationship
	<p>Click the <b>Actions</b> menu and select the <b>Apply for Subapplication</b> link for creating and linking new subapplications.</p> <p>For more information about the applications list page, see <i>Managing Applications</i>.</p>
Permit detail - Overview page	<p>Click the <b>Actions</b> menu and select <b>Apply for Subapplication</b>. Select <b>Link Subapplications</b> to link existing subapplications. For more information about the permit overview, see <i>Viewing the Permit Overview</i>.</p>
Permit detail - Linked Permits page	<p>Click <b>Linked Permits</b> in the left-hand navigation panel in the permit details. On the Linked Permits page, use the <b>Apply for Subapplication</b> button for creating a new subapplication and the <b>Link Subapplication</b> button for linking existing subapplications. For more information about the linked permits for a permit, see <i>Working with Linked Permits</i>.</p>
Permit detail - Related Transactions page	<p>Click <b>Related Transactions</b> in the left-hand navigation panel in the permit details. Click the <b>Link Applications</b> button and select one or more subapplications to link. On the Link applications drawer, you have different options to add a link or add as a primary or secondary application, depending on the existing linking and relationship type.</p> <p>For more information about the related transactions for a permit, see <i>Working with Related Transactions</i>.</p>

To remove the link between the applications, use the **Remove Application Link** action available on the Linked Permits page and the Related Transactions page.

**Subapplication:** A secondary or related application that has been linked to a primary application. Add the primary permit application using any of these methods:

Subapplication Relationship Type	Update Relationship
Permit detail - Overview page	<p>Click the <b>Link Primary</b> button if the subapplication isn't linked to a primary permit yet.</p> <p>Click the <b>Update Relationship</b> button to open a drawer where you can select a different relationship type, including Primary or Independent. On the drawer, you can also link to a primary application if the subapplication isn't linked yet or click the <b>Manage Primary</b> button to link to a different primary permit.</p> <p>For more information about the permit overview, see <i>Viewing the Permit Overview</i>.</p>
Permit detail - Linked Permits page	<p>Click <b>Linked Permits</b> in the left-hand navigation panel in the permit details. On the Linked Permits page, use the <b>Link Subapplication</b> button for linking existing subapplications.</p> <p>For more information about the linked permits for a permit, see <i>Working with Linked Permits</i>.</p>
Permit detail - Related Transactions page	<p>Click <b>Related Transactions</b> in the left-hand navigation panel in the permit details. Click the <b>Link Applications</b> button and select one or more applications to link. On the Link applications drawer, you have different options to add a link or add as a primary or secondary application, depending on the existing linking and relationship type.</p> <p>For more information about the related transactions for a permit, see <i>Working with Related Transactions</i>.</p>

## Linking Reference Entities to a Permit

Depending on agency setup, you can link permit transactions to agency-defined reference entities, such as buildings.

You must have reference entities configured for your agency to link your permits to the reference entities. After your agency defines different reference entities by type, and further differentiates them by category and subcategory, you can reference the entities as part of a permit application. For example, your agency might administer commercial building permits for campuses with multiple buildings. By setting up reference entities for buildings, your agency can collect information about the buildings, such as floors and stairwells. For more information, see [Reference Entity Overview](#).

This example illustrates the page on which you can link reference entities to a permit on the intake form set up to support reference entities.

Commercial Building

## Reference Entities

**Reference Entities**

1 item [+ Link](#)

Location	ID	Name	Reference Entity Type	Status	Description	Actions
	<a href="#">FISP-2025-0000000003</a>	Infoteck Storage Building Sprinkler System	Sprinkler System	Active	Sprinkler system for Infoteck's manufacturing storage building on the south side of campus.	

Cancel Save [Continue](#)

4 | 5

- Application
- Applicant Information
- Property Information
- Reference Entities
- Review

Once permits are linked to reference entities, you can maintain the reference entities for each permit application and copy associated reference entities when you make duplicates of the permit application. The reference entity details that your agency collects are saved as part of the permit history.

Linking reference entities to the permit allows the linked reference entities to be selected when creating an inspection, if the reference entities are marked as inspectable in the agency setup.

## Linking Reference Entities During Application Intake

On the Reference Entities tab in the permit application intake form, click the **+ Link** (add link) button. On the **Link reference entities** drawer, you can search for and select from the available reference entities. Click **Add** on the drawer to associate the reference entities with the permit you are working with. Once you submit the application, the reference entities are listed on the Reference Entities page in the permit application details.

You can remove the link to a reference entity by clicking this icon in the **Actions** column:  .

## Linking Reference Entities After Application Submission

Once an application is submitted, only authorized agency staff can manage the reference entities linked to a permit.

On the Reference Entities page in the permit application details, agency staff can click the **+ Link** (add link) button. On the **Link reference entities** drawer, you can search for and select from the available reference entities. Click **Add** on the drawer to associate the reference entities with the permit you are working with.

Agency staff can remove the link to a reference entity by clicking this icon in the **Actions** column:  .

### Related Topics

- [Working with Linked Reference Entities](#)
- [Copying an Application](#)

# 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 Worklists and Managing Tasks

## Worklist Overview

The Worklist page provides a single location for agency users to view and work on items across supported offerings, such as **License**, **Code Enforcement**, **Permits**, and **Planning and Zoning**.

### Accessing and Using the Worklist

From the Fusion Applications Permitting and Licensing homepage, click the **Worklist** tile to access the Worklist page.

The worklist displays the tabs and records that are available to you based on your role, permissions, and enabled offerings. The users having access to more than one offering, can use the drop-down menu to select the worklist to view. When you open any worklist, the grid initially loads 25 records at a time. Scroll down in the grid to view more records.

Let's take a look at the fields for the worklist page:

Page Element	Description
<b>All</b>	Displays worklist tabs available to the user across enabled offerings. Best for users who work across multiple offerings
<b>License</b>	Displays license-related worklist tabs, such as unassigned license applications, my license applications, incoming tasks, and my tasks.  For more information see <a href="#">Using the License Worklist</a> .
<b>Code Enforcement</b>	Displays code enforcement worklist tabs, such as inspections, access requests, unassigned incidents, incidents, notices, hearings, unassigned cases, and cases etc.  For more information see <a href="#">Using the Code Officer Worklist</a> and <a href="#">Using the Code Technician Worklist</a> .
<b>Permits</b>	Displays permit-related worklist tabs, such as incoming tasks, my tasks, plan reviews, faulted transactions, and alerted tasks.  For more information see <a href="#">Using the Permits Worklist</a> .
<b>Planning and Zoning</b>	Displays planning-related worklist tabs, such as unassigned planning applications planning applications, planning activities, plan reviews, incoming tasks, and my tasks.  For more information see <a href="#">Using the Planning and Zoning Worklist</a> .

**Note:** The tabs, records, columns, and actions that appear on a Worklist page depend on the selected offering and the user's security access. Users see only the worklist information that they are authorized to access.

Now, let's look at the common page elements for the worklist page:

Page Element	Description
<b>Worklist dropdown</b>	Allows users to switch between All, License, Code Enforcement, Permits, and Planning and Zoning.
<b>Tabs</b>	Display the worklist tabs available for the selected offering.
<b>Tab count</b>	Displays the number of records.  <b>Note:</b> The tab count is calculated the first time you open a worklist tab. After the count is displayed, changing, or applying filter chips within the tab does not update the tab count.
<b>Search</b>	Allows users to search records in the selected tab.
<b>Filters</b>	Help users filter the results by the available values.
<b>Results table</b>	Displays records for the selected tab. Columns vary by offering and tab. Select a row to open the corresponding details page of that application.
<b>Actions menu</b>	Provides row-level actions based on the selected record and user permissions.
<b>Export button</b>	Allows users to export or download table data.
<b>Customize Columns button</b>	Allows users to manage visible table columns.
<b>Edit Page Layout</b>	Allows users to personalize the page layout by adding or arranging available KPIs.
<b>Reset to Default</b>	Restores the default page layout.

## Viewing Tasks in the Worklist

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

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

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

For more information, see [Worklist Overview](#).

Here's how to access the Worklist pages and tasks:

1. The menu link for **Permitting and Licensing Worklist** takes you to the Worklists available for your agency user role:
2. On the Worklist page, click the drop-down list to select an offering.
3. On the selected Worklist <Offering> page, select the tab that lists the tasks that you want to review.
4. Click a task in the list to open the transaction details.

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

## Using the Code Technician Worklist

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

### Security Details for Using the Code Technician Worklist

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

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

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

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

### Accessing and Using the Worklist

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

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

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

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

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

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

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

### Grid-level Filter

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

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

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

Incidents (54)

Code Officer:  Code Technician:

Incident	Issue Type	Issue Subtype	Status	Reported Date	Issue	District Type	District	Technician	Code Officer	Actions
Micelnc-APR2022-00088	MicelIssueType	MicelIssueSubtype	Reported	4/11/22	Incident Review due date - 5 days	Code_Enforcement	CE Dist1	Chris Gayle		⋮
000122	STPublicNuisance	STWIssueTy	Reported	4/11/22	Details about the abandoned car			Chris Gayle		⋮

## Tabs on the Code Technician Worklist

The code technician worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
Incoming Incidents	<p>Unclaimed incidents. These are incidents in <i>Reported</i> status that do not have an assigned technician.</p> <p>This tab includes:</p> <ul style="list-style-type: none"> <li>A <b>Report Incident</b> button which provides quick access for the user to report a new incident from the worklist. For details on reporting incidents, see <i>Reviewing Incident Lists</i>.</li> <li>A map view for displaying incident locations.</li> </ul> <p><b>Note:</b> If automatic routing is active, this tab displays only incidents in the user's area of responsibility, as established by the Issue Type and Issue Subtype attributes for the Code Enforcement Technician or Code Enforcement Supervisor job functions. If there are no unassigned incidents in a technicians areas of responsibility, the Worklist tab order changes to show Incidents as its first tab.</p>	<ul style="list-style-type: none"> <li>Claim (code enforcement technicians)</li> <li>Assign (code enforcement supervisors)</li> </ul>	<p>Supervisors assign incidents to code enforcement technicians, while technicians claim incidents for themselves. Both actions result in assigning a technician to the incident, which removes the incident from this tab.</p> <p>For more information, see <i>Claiming and Assigning Incidents</i>.</p> <p>The <b>Overdue</b> subtab shows unclaimed incidents with a due date before the current date.</p> <p>The <b>Priority</b> subtab shows unclaimed incidents where the <b>Priority</b> switch is enabled.</p>
All Incidents	<p>Unprocessed incidents (those in Reported status) where the current user is the assigned code technician as well as the incidents that match the technician's issue type and subtype.</p> <p>The list also includes reassigned incidents from the administrator or from another staff member.</p> <p>This tab includes:</p> <ul style="list-style-type: none"> <li>A <b>Report Incident</b> button which provides quick access for the user to report a new incident from the worklist.</li> <li>A map view for displaying incident locations.</li> </ul>	<ul style="list-style-type: none"> <li>Schedule Inspection</li> <li>Mark as Duplicate</li> <li>Reassign</li> <li>Release</li> <li>Reroute Incident</li> <li>Close</li> </ul>	<p>The actions that are available here are also available from the incident detail page.</p> <p>For more information, about taking action on incidents, see <i>Processing Incidents</i>.</p> <p>Completing any of the available actions removes the incident from this tab.</p> <p>The <b>Overdue</b> subtab shows claimed incidents with a due date before the current date.</p> <p>The <b>Priority</b> subtab shows claimed incidents where the <b>Priority</b> switch is enabled.</p>
Incidents	Unprocessed incidents (those in <i>Reported</i> status) where the current user is the assigned technician.	Same as above	

Tab	Displays	Available Actions	Additional Information
All Notices	<p>List of notices from cases that are assigned to the code technician as well as the notices that match the technician's issue type and subtype.</p> <p>Notices are separately listed as notice of violations, notice of citations, and ad hoc notices.</p> <p>Violation and citation notice object records are created for violations and citations respectively.</p>	<p>Tabs: Notice of Violation, Notice of Citation, and Ad Hoc:</p> <ul style="list-style-type: none"> <li>• Generate</li> <li>• Continue</li> </ul> <p>Tab: Ready to Mail:</p> <ul style="list-style-type: none"> <li>• Download to Print</li> <li>• Update Mailing Details</li> <li>• Mark as Sent</li> </ul>	<p>The notices are classified in the four subtabs – Notice of Violation, Notice of Citation, Ad Hoc, and Ready to Mail.</p> <p>The <i>Generate</i> action signifies that the notice object alone is created, and you should use the action to open the Generate Notice page complete the details, review, and print.</p> <p>Once a notice is in Generated status, it moves to the <b>Ready to Mail</b> tab.</p> <p>The <i>Continue</i> action signifies that the notice is generated, and you can make changes to the details before printing it.</p> <p>Any changes made to the notice process will automatically update the case detail pages.</p> <p>A citation notice additionally contains information about the citation fees.</p> <p>The <b>Download to Print</b> action downloads the report in a separate tab, ready to print.</p> <p>The <b>Update Mailing Details</b> action opens the mailing details modal page to update the tracking details of the notice report.</p> <p>The <b>Mark as Sent</b> action changes the status of the notice from Generated to Sent. The record is removed from the Worklist. You can access the Notices page in case details and view the detail.</p> <p>See Editing Notice Details under <i>Working with Notices</i>.</p>
Notices	<p>List of notices from cases that are assigned to the code technician. Notices are separately listed as notice of violations, notice of citations, and ad hoc notices.</p>	Same as above	
All Hearings	<p>Cases assigned to the logged in technician that have requested appeals or hearings in <i>Scheduled</i> status. These include the cases that match the technician's issue type and subtype.</p>	<ul style="list-style-type: none"> <li>• View and download attachments added by responsible party</li> <li>• Add or delete your own attachments</li> </ul>	<p>For details about appeals and hearings, see <i>Working with Appeals and Hearings</i>.</p>

Tab	Displays	Available Actions	Additional Information
		<ul style="list-style-type: none"> <li>Update Hearing Decision</li> <li>Reschedule Hearing</li> <li>Cancel</li> </ul>	
Unassigned Cases	Unassigned cases. These are cases that do not have an assigned technician.	<ul style="list-style-type: none"> <li>Claim (code technicians)</li> <li>Multiple Select Claim (code technicians)</li> </ul>	<p>When you click the <b>Claim</b> button, the case is assigned to you and the row is removed from this list page.</p> <p>The <b>Multiple Select</b> button allows you to select multiple cases using checkboxes. Click <b>Claim</b> to assign the selected cases to yourself.</p> <p>You can also claim or assign cases to another staff from the Cases list page and the case Overview page. See <i>Processing Cases</i> and <i>Viewing the Case Details Overview</i>.</p>
All Access Requests	Cases assigned to the logged in technician that have pending requests from registered public users who have asked for online access to the case. These include the cases that match the technician's issue type and subtype.	<ul style="list-style-type: none"> <li>Allow Access</li> <li>Deny Access</li> </ul> <p><b>Note:</b> An email notification is sent to the registered user about the request approval or denial.</p> <p>For details, see <i>Adding Responsible Parties</i></p>	<p>Public users who are granted access can view details of their cases and notices online. They can also take actions such as submitting an appeal.</p> <p>Users can't access their case if the agency denies their request.</p>
Cases	All active cases assigned to the logged in technician, including the auto-assigned ones. The list also includes reassigned cases from the administrator or from another staff member.	Update Status	<p>Status options:</p> <ul style="list-style-type: none"> <li>Violation</li> <li>Closed</li> <li>Compliance</li> <li>Void</li> <li>Mandatory Abatement</li> <li>Legal</li> </ul> <p>Once the status of a case changes to <i>Compliance</i>, it is removed from the list.</p>
Incoming tasks	<p>List of all the workflow tasks related to incidents and cases that are assigned to the logged in technician or the technician group.</p> <p>Incoming tasks remain in the list until they are closed.</p>	<ul style="list-style-type: none"> <li>Claim</li> <li>Reassign</li> </ul> <p>Once claimed, the Actions options allows you to update, release, or reassign the workflow task.</p>	<p>When you claim a workflow task, the My Tasks subtab will list the task according to how it is assigned – My Tasks or My Group Tasks. You can take these actions:</p> <ul style="list-style-type: none"> <li><i>Update</i>: Change the status, priority, or review and add comments and attachments. The Update Tasks page allows</li> </ul>

Tab	Displays	Available Actions	Additional Information
			<p>you to page through all your tasks and make updates to each task. The Workflow page related to the selected incident or case is updated when you save the changes.</p> <ul style="list-style-type: none"> <li>• <i>Release</i>: Unassign the workflow task from your list. This is available only for My Tasks assignments.</li> <li>• <i>Reassign</i>: Change the assignee of the workflow task. This is available only for My Tasks assignments.</li> </ul> <p><b>Note:</b> The My Tasks subtab separates the assigned tasks into two subtabs – Assigned Today and Assigned Earlier, depending on the time of assignment.</p> <p>When you reassign a workflow task to another technician, the My Tasks subtab for the assigned technician will list the task.</p> <p>For information on Workflow, see <i>Using Workflow in Code Enforcement</i>.</p>

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

## Using the Code Officer Worklist

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

**Tip:** As code officers, you can access your inspections on a phone as well as on a laptop or desktop computer. The layout changes based on the device you’re using. For detailed information about mobile inspections, see *Accessing the Code Officer Application*.

Select **Worklist** on the Permitting and Licensing home page. On the Worklist page, select **Code Enforcement** from the offerings drop-down list.

Initially all tabs to which you have access appear. Click a tab to see the incidents or cases that meet the tab filter criteria and to access the relevant actions.

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

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

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

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

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

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




### Grid-level Filter

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

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

## Tabs on the Code Officer Worklist

The code officer worklist has the following tabs:

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

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

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

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

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

## Using the License Worklist

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

Go to the Worklists on the Permitting and Licensing home page. On the Worklist page, select **License** from the offerings drop-down list.

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. Filter chips are displayed only when matching data is available.

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 license worklist has the following tabs:

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

Tab	Displays	Available Actions	Additional Information
		<p><b>Withdraw Application</b></p> <p>Click the Actions menu for the application row and select Withdraw Application. Enter a reason for the withdrawal and click OK. The application form gets removed from the worklist.</p> <p>The <b>Withdraw Application</b> action is available from the submission of the application until its completion. The statuses in which an application can be withdrawn are:</p> <ul style="list-style-type: none"> <li>• <i>Accepted</i></li> <li>• <i>In process</i></li> <li>• <i>Inspection</i></li> <li>• <i>License issuance</i></li> </ul>	
My Applications	<p>Submitted and In Process business license applications that are assigned to the current user.</p> <p>Subtabs to My Applications:</p> <ul style="list-style-type: none"> <li>• Consultation Applications</li> <li>• Origination Applications</li> <li>• Amendment Applications</li> <li>• Renewal Applications</li> </ul> <p>Comments and attachments pertaining to this application.</p> <p>This tab includes a map view for displaying application locations.</p>	<ul style="list-style-type: none"> <li>• <b>Send Message</b> See <i>Working with Communications</i>.</li> <li>• <b>Reassign</b> See <i>Working with Specialists</i>.</li> <li>• <b>Copy Application</b> See <i>Copying an Application</i>.</li> <li>• <b>Update Description</b></li> </ul>	<p>Review or add your own comments and attachments.</p> <p>See <i>Working with Application Attachments</i> and <i>Working with Comments</i>.</p> <p>Reassigning an application to a different user removes it from this tab.</p> <p>Users with access to this tab can reassign applications even if they don't have the additional security that provides access to the Unassigned Applications tab.</p> <p>A condition icon is displayed on the row if an application has a condition applied. If multiple conditions are applied, then the icon displays the most severe condition. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.</p> <p>For more information see, <i>Working with Application Conditions</i>.</p>
Incoming Tasks	<p>All active applications assigned for the group.</p> <p>Subtab for Incoming Tasks:</p> <p>My Tasks</p>	<p>If the incoming task is for the group then the specialist has the following actions:</p> <ul style="list-style-type: none"> <li>• <b>Claim</b></li> <li>• <b>Reassign</b></li> </ul>	<p>If you update the task by assigning or reassigning to another specialist, the workflow task – <b>Assign Specialist</b> will be updated to the Specialist Assigned status using the Business Rules Framework configuration.</p>

Tab	Displays	Available Actions	Additional Information
	<ul style="list-style-type: none"> <li>Assigned Today</li> <li>Assigned Earlier</li> </ul>	<p>If the task is already assigned to the logged in specialist, then the specialist has the following actions:</p> <ul style="list-style-type: none"> <li><b>Update</b></li> <li><b>Release</b></li> <li><b>Reassign</b></li> <li><b>Withdraw</b></li> </ul>	<p>When you withdraw a task for a record, the workflow activity is updated accordingly.</p> <p>For more details, see <a href="#">Using Workflow</a>.</p>
Calendar	Shows the meeting schedules for the agency on a calendar or on a list.	<ul style="list-style-type: none"> <li>View consultation meetings assigned to the specialist logged in.</li> <li>View all meeting schedules.</li> </ul>	<p>Calendar View shows the meetings scheduled for the month. You can choose to view the calendar by month, week, or day.</p> <p>List view shows the list of all consultation meetings.</p> <p>See the section <a href="#">Viewing Meetings on the Calendar</a> in <a href="#">Working with Meetings</a>.</p>

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

## Viewing Additional Application Information

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

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

## Using the Permits Worklist

The permits worklist provides a central location for performing permit-related activities. Separate tabs list incoming unassigned tasks, plan reviews, faulted transactions, alerted tasks, billing accounts and tasks that are assigned to the current user.

Select **Worklist** on the Permitting and Licensing home page. On the Worklist page, select **Permits** from the offerings drop-down list.

The tabs and records that appear depend on your roles, permissions, and page layout. Each tab contains a grid with records for that type of work. Depending on the selected tab and your permissions, you can search, filter, sort columns, download grid data, personalize the grid, and perform row-level actions from the Actions menu. Users with access to

page layout personalization can click Edit Page Layout to update the page layout and Reset to Default to restore the delivered layout.

The permits worklist can include the following tabs:

Tab	Displays	Available Actions	Additional Information
<b>Incoming Tasks</b>	Active workflow tasks assigned to a work group but not yet claimed by an individual user.	Claim, Reassign, Withdraw, View Details	Task Name, Application ID, and View Details links open the permit details page and workflow information.
<b>My Tasks</b>	Workflow tasks currently assigned to the logged-in user.	Update Result, Release, Reassign, Withdraw, View Details	Tasks can be filtered by Assigned Today and Assigned Earlier.
<b>Plan Reviews</b>	Planning applications with plan review work available to you.	View Calendar, and application-level navigation from the Application ID link.	This tab appears for users with plan reviewer access. The list is sorted by due date in ascending order, with overdue reviews at the top and blank due dates at the bottom.  Use the filter chip to show either overdue reviews or reviews due today.
<b>Faulted Transactions</b>	Workflow transactions that encountered processing errors.	Retry, View Details	Retrying a transaction resumes workflow processing and removes the transaction from the faulted list when successful.
<b>Alerted Tasks</b>	Workflow tasks that require attention based on configured alert criteria.	View Details	Tasks appear in the Alerted tab only when assigned staff are no longer with the agency.
<b>Billing Account</b>	Billing accounts associated with permit applications and related transactions	View Details	Displays billing account information, including account identifiers, associated permit applications, account status, balances, and related billing activity.  Availability depends on user security permissions and enabled offerings.

## Claiming a Task

Use this task to assign an available workflow task to yourself.

To claim a task:

1. Open the Permit Worklist.

2. Select the **Incoming Tasks** tab.
3. Locate the task you want to work on.
4. Open the Actions menu for the task.
5. Select **Claim**.

The task is assigned to you and moves to the **My Tasks** tab.

## Reassigning a Task

Use this task to transfer responsibility for a workflow task to another user.

To reassign a task:

1. Open the Permit Worklist.
2. Locate the task in either the **Incoming Tasks**, **My Tasks**, or **All Tasks** tab.
3. Open the Actions menu.
4. Select **Reassign**.
5. Select the user to whom the task should be assigned.
6. Click **Assign**.

The task is removed from your task list and assigned to the selected user.

## Releasing a Task

Use this task to return a claimed task to the work group.

To release a task:

1. Open the **My Tasks** tab.
2. Locate the assigned task.
3. Open the Actions menu.
4. Select **Release**.

The task is removed from your assigned tasks and returned to the work group's available task pool.

## Withdrawing a Task

Use this task when a workflow task should no longer be processed.

To withdraw a task:

1. Open the appropriate worklist tab.
2. Locate the task.
3. Open the Actions menu.
4. Select **Withdraw**.
5. Confirm the action.

The task is removed from active workflow processing.

## Viewing Permit Details

Use this task to review permit information associated with a workflow task.

To view permit details:

1. Open any worklist tab.

2. Select one of the following:

- o **Task Name**
- o **Application ID**
- o **View Details**

The permit record opens and displays workflow information for the selected task.

## Viewing Application Conditions

Use this task to review conditions applied to a permit.

To view permit conditions:

1. Locate a permit with a condition indicator.
2. Select the condition icon.

The system **Condition summary** drawer displays all conditions associated with the permit, including:

- Condition name
- Severity
- Description
- Date applied

## Using the Planning and Zoning Worklist

The Planning and Zoning worklist provides a central location for agency staff to review and act on planning and zoning work.

Go to the Worklists on the Permitting and Licensing home page. On the Worklist page, select **Planning and Zoning** from the offerings drop-down list.

The tabs and records that appear depend on your roles, permissions, and page layout. Planning and zoning work can include unassigned planning applications, planning applications, planning activities, plan reviews, and workflow tasks.

Each tab contains a grid with records for that type of work. Depending on the selected tab and your permissions, you can search, filter, sort columns, download grid data, personalize the grid, and perform row-level actions from the Actions menu.

Users with access to page layout personalization can click **Edit Page Layout** to update the page layout and **Reset to Default** to restore the delivered layout.

## Using the Worklist Tabs

Click a tab to view the corresponding planning and zoning records. Counts can appear next to tab names to indicate the number of records in the tab.

The Planning and Zoning worklist can include these tabs:

Tab	Displays	Available Actions	Additional Information
<b>Unassigned Planning Applications</b>	Planning applications that don't have an assigned planner.	Assign planner	Use this tab to assign submitted planning applications to eligible planners.  Click the application ID to open the application details page.  Click condition or fee links to view additional details in a drawer.
<b>Planning Applications</b>	Planning applications in a searchable and filterable grid.	View Details, Send Message, Update Planner, Copy Application, Update description, Comments, Attachments, Withdraw	This tab includes application information such as application ID, application type, status, condition, fees, planner, address, city, and applicant, depending on the grid configuration.  Use the <b>Planner</b> and <b>Type</b> filters to refine the list.
<b>Planning Activities</b>	Open planning activities available to you.	View or Update	This tab includes activity information in a searchable and filterable grid. Filters can include planner, type, and due-date filters such as overdue, due today, due this week, and due next week.  Click an activity or row to open the Activity Tracking page for the application.
<b>Plan Reviews</b>	Planning applications with plan review work available to you.	View Calendar, and application-level navigation from the Application ID link.	This tab appears for users with plan reviewer access. The list is sorted by due date in ascending order, with overdue reviews at the top and blank due dates at the bottom.  Use the filter chip to show either overdue reviews or reviews due today.
<b>Incoming Tasks</b>	Workflow tasks available to your role or group.	Claim, Reassign, and other actions depending on task status and permissions.	Use this tab to claim or reassign workflow tasks available to your group.
<b>My Tasks</b>	Workflow tasks assigned to you.	Update, Release, Reassign, and other actions depending on task status and permissions.	Use this tab to work with tasks assigned directly to you.

## Searching and Filtering the Worklist

Use the **Search** field to search within the selected tab.

Some tabs include filter chips below the **Search** field. For example, the Planning Applications tab can include **Planner** and **Type** filters. The Planning Activities tab can include filters for planner, activity type, and due dates.

A planner filter can be applied by default for the signed-in user. You can change or remove the filter to view other records, depending on your permissions. If you don't have access to other records, changing or removing the filter doesn't display records outside your security access.

When available, you can select multiple filter values. The grid refreshes based on the filters you apply.

For more information, see [Using Search](#).

## Assigning Unassigned Planning Applications

Use the **Unassigned Planning Applications** tab to review planning applications that don't have an assigned planner.

The grid includes application information such as application ID, application type, status, condition, fees, applicant, address, and other application details, depending on the grid configuration.

To assign an application:

1. Click the **Unassigned Planning Applications** tab.
2. Find the application you want to assign.
3. In the Actions column, click **Assign planner**.
4. In the **Assign** drawer, search for or select an eligible planner.
5. Click **Assign**.

After the application is assigned, it is removed from the Unassigned Planning Applications tab. If the application is assigned to you, it appears in the Planning Applications tab based on the filters and permissions that apply to you.

## Reviewing Planning Applications

Use the **Planning Applications** tab to review planning applications in a searchable and filterable grid.

The grid can include information such as:

Page Element	Description
<b>Application ID</b>	The planning application number. Click the link to open the application details page.
<b>Application Type</b>	The type of planning application.
<b>Status</b>	The current application status.
<b>Condition</b>	A link to condition information, when conditions apply.
<b>Fees</b>	A link to fee information, when fees apply.
<b>Planner</b>	The planner assigned to the application.
<b>Address</b>	The property or application address.

Page Element	Description
City	The city for the application address, when displayed separately.
Applicant	The applicant associated with the application.

Use the **Planner** filter to view applications assigned to a specific planner. Use the **Type** filter to view applications by application type.

Click an application ID to open the application details page. From the application details page, click **Go to Worklist** to return to the worklist.

Use the **Actions** menu to perform these actions for a planning application:

Action	Description
View Details	Opens the application details page.
Send Message	Opens the message page or drawer for sending a communication related to the application.
Update Planner	Opens the planner assignment drawer so you can change the assigned planner.
Copy Application	Starts the copy application process.
Update description	Opens the description drawer so you can update the application description.
Comments	Opens comments for the application.
Attachments	Opens attachments for the application.
Withdraw	Opens the withdrawal drawer so you can withdraw the application.

## Reviewing Planning and Zoning Activities

Use the **Planning Activities** tab to review open planning activities.

By default, the tab can show activities assigned to the signed-in planner. You can change or remove the planner filter to view other activities, depending on your permissions.

Use filters to refine the activity list. Available filters can include:

Filter	Description
Planner	Filters activities by assigned planner.
Type	Filters activities by activity type.

Filter	Description
<b>Overdue</b>	Shows activities that are past due.
<b>Due Today</b>	Shows activities due today.
<b>Due This Week</b>	Shows activities due during the current week.
<b>Due Next Week</b>	Shows activities due during the next week.

Click an activity link or row to open the Activity Tracking page for the planning application. From the application details page, click **Go to Worklist** to return to the worklist.

Use the **View or Update** action to open the activity details drawer. The drawer shows activity fields and comments for the activity.

Completing an activity removes it from the open activity list, but it doesn't necessarily change the application status.

## Reviewing Plan Reviews

Use the **Plan Reviews** tab to review assigned plan reviews from the Planning and Zoning worklist. The tab appears for users with plan reviewer access. System administrators can also access plan review work from the common worklist.

The **Plan Reviews** tab opens in list view by default. The list is sorted by **Due Date** in ascending order, with overdue plan reviews displayed at the top of the list. Plan reviews without a due date appear at the bottom.

The Plan Reviews grid displays these columns in this order:

Page Element	Description
<b>Application ID</b>	The planning application associated with the plan review. Click the application ID to open the application details.
<b>Application Type</b>	The type of planning application.
<b>Due Date</b>	The plan review due date.
<b>Overdue</b>	Displays an icon when the plan review is overdue.
<b>Cycle</b>	The plan review cycle.
<b>Property</b>	The property associated with the planning application.
<b>Condition</b>	Condition information for the application, when applicable.
<b>Balance (USD)</b>	The application balance.

Page Element	Description
<b>Description</b>	The application or plan review description.

Use the filter chip to limit the list to **Overdue** reviews or reviews **Due Today**. These filter options are mutually exclusive, so you can select only one at a time.

Click **View Calendar** to view assigned plan reviews on a calendar. The calendar opens in weekly view by default and shows plan reviews in the All Day row. Overdue plan reviews are visually distinguished from other calendar items. When you view plan reviews on the calendar, the Search field and filter chips are hidden.

When you return from calendar view to list view, the list view is displayed with the Search field cleared, all filter chips removed, and all rows displayed.

For more information, see [Performing Plan Reviews](#).

## Working with Workflow Tasks

The Planning and Zoning worklist can include workflow task tabs such as **Incoming Tasks** and **My Tasks**.

- Use **Incoming Tasks** to review tasks available to your role or group. Depending on the task and your permissions, you can claim or reassign a task.
- Use **My Tasks** to review tasks assigned to you. Depending on the task and your permissions, you can update, release, or reassign a task.

Workflow task actions update the related workflow task. For example, when a planner assignment task is completed, the workflow task status is updated according to the agency’s workflow and business rules configuration.

## Viewing Conditions and Fees

Planning application rows can include links for conditions and fees.

Click a condition link to view condition details in a drawer. Condition details can include the condition name, severity, description, and applied date.

Click a fee link to view fee details in a drawer.

For more information, see [Working with Application Conditions](#).

## Downloading and Personalizing Grid Data

Where available, use the download action to download grid data from the selected tab.

Use the grid personalization action to update the grid display. Depending on your access and page layout, you can show, hide, or rearrange columns.

Users with access to page layout personalization can click the **Edit Page Layout** button to update the page layout. Click the **Reset to Default** button to restore the delivered layout.

## Managing All Tasks

The All Tasks 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 PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician

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

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

## Reviewing and Managing Tasks

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

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

Page Element	Description
<b>Fees/Conditions</b>	If any fees are due or conditions are applied, icons indicating this appear in the left column of the grid.  See the section, "Viewing Additional Transaction Information" for more information.
<b>Task Name</b>	Identifies the nature of the task to be performed. Values include <i>Application Acceptance</i> , <i>Permit Completion</i> , and so on.
<b>Task ID</b>	The unique identifier of the task.
<b>Application ID</b>	The application ID for the individual submitted transaction being worked, such as the permit ID.

Page Element	Description
<b>Application Type</b>	The type of application being worked, such as <i>Solar Permit</i> , <i>Retail Business License</i> , and so on.
<b>Application Status</b>	Displays the task status. Different types of tasks can have different statuses. For example, permit tasks may have a status of <i>Assigned</i> , while inspection tasks can have the status <i>Scheduled</i> , which is not applicable to permit workflow tasks.
<b>Relationship Type</b>	Displays the type of relationship such as primary application or subapplication.
<b>Relationship Details</b>	Displays the detail of the application that is associated to the application. Click the link to access the application.
<b>Assigned To</b>	Displays to whom the task is assigned.
<b>Assigned Date</b>	Displays the date on which the task was assigned.
<b>Actions</b>	Click to display the actions you can take for that task, such as <i>Claim</i> , <i>Reassign</i> , and so on.
>	Click to access details for the transaction to which the task is related. The page that appears depends on the type of task. For example, clicking the button for a permit workflow takes you to the Workflow page in the permit details.

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

## Viewing Additional Transaction Information

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

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



# 5 Using Common Interface Pages and Elements

## Using Grids

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

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






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





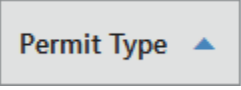



- *Condensed* – Displays multiple data elements in a single column. This is the default format for public users.
- *Expanded* – Displays only one data element per column and provides user-level personalization options. This format and personalization options are only for agency staff.

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

## Common Grid Controls

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

Control	Usage
	Click to download the list of records in a CSV file format. The downloaded file displays all visible fields in separate columns.
	Click to view check boxes for selecting multiple rows before performing an action.
 Show All Statuses   Show All Cycles	Some grids may have additional options available to control data displayed in a grid. For example, the <b>Show All Statuses</b> switch is available on the Transactions page and the <b>Show All Cycles</b> switch is available on the Plan Reviews page.
	Search by alphanumeric characters on the fields that are displayed on the page.  All visible fields in the grid are searchable.

Control	Usage
	When you search on dates, use this format: MM/DD/YYYY.
	<p>Click the filter button to open the filter options, where you can define, modify, and save your own filters. The <b>Filter By</b> panel opens and you can select from the various advanced filter options to refine your search. All visible fields in the grid can be filtered.</p> <p>See the "Using the Advanced Filter" section in this topic for more information about the <b>Filter By</b> panel.</p>
	Click the List View button to view the records in a list.
	<p>Click the Sort button, available only in the list view in the condensed grid format, to select the field by which you want to sort the rows. The available sort fields depend on the fields in the grid.</p> <p>When you first select a field to sort, the sorted rows appear in ascending order. To view sorted rows in descending order, click the sort icon next to the selected field again. Click the sort icon again to return to the original sort order.</p> <p>In the condensed grid format, the sort appears on each column.</p>
	Click the Grid View button to view the records in a grid.
	<p>Click the arrow icon on columns in grid view to sort alphanumerically by fields displayed in the column. If the column displays only one field, click the arrow icon to sort based on the field value. If the column displays multiple fields, click the arrow icon in the column heading to show a list of fields that are sortable, then select the field you want to sort by.</p> <p>The initial sort displays records in ascending order. Select the same sort again to show records in descending order, and once again to return to the original order.</p> <p>The location or property information column also uses sorting logic that accounts for the street name followed by the street number.</p>
	<p>View the inventory of records on an interactive map.</p> <p>The map view includes a left frame with a list of items and a right frame with a map that has markers to show the locations of the items on the list. You can click a list item to zoom to its marker on the map.</p> <p>The search and filter options in the map view are the same options that you have in the list and grid views.</p> <p>See <a href="#">Viewing Map Markers</a>.</p>
	Click to select the applicable actions for each row.
	Click to view more details about the object in the row. When this button isn't available, you can click the row to open the details page.

## Personalizing Grid Displays

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

The display settings enable each user to:

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

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

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

To personalize an expanded grid:

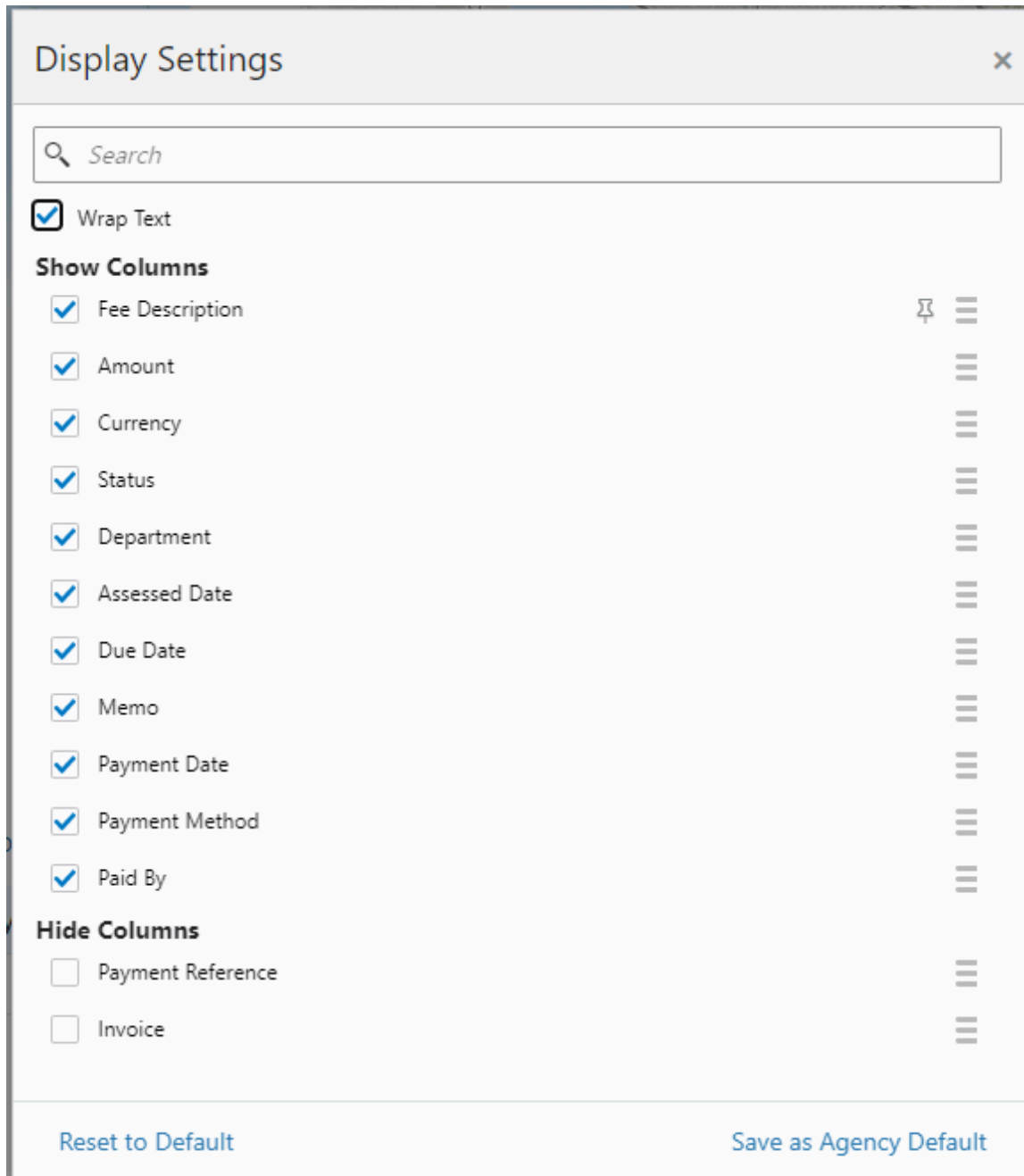
1.

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






2. The Display Settings modal page opens.

Example of the Display Settings modal page



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

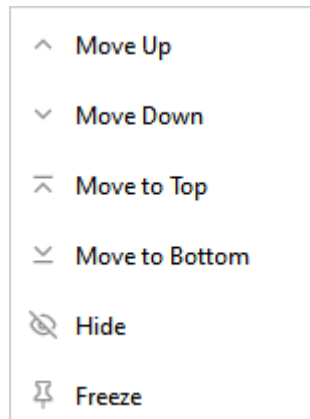
3. Adjust the available display settings.

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

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

Row-level actions menu on the Display Settings page



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

4. Click the **Close** button.

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

## Using Search

On selected pages in Oracle Permitting and Licensing you can use search to find transactions quickly.

### Working with Search

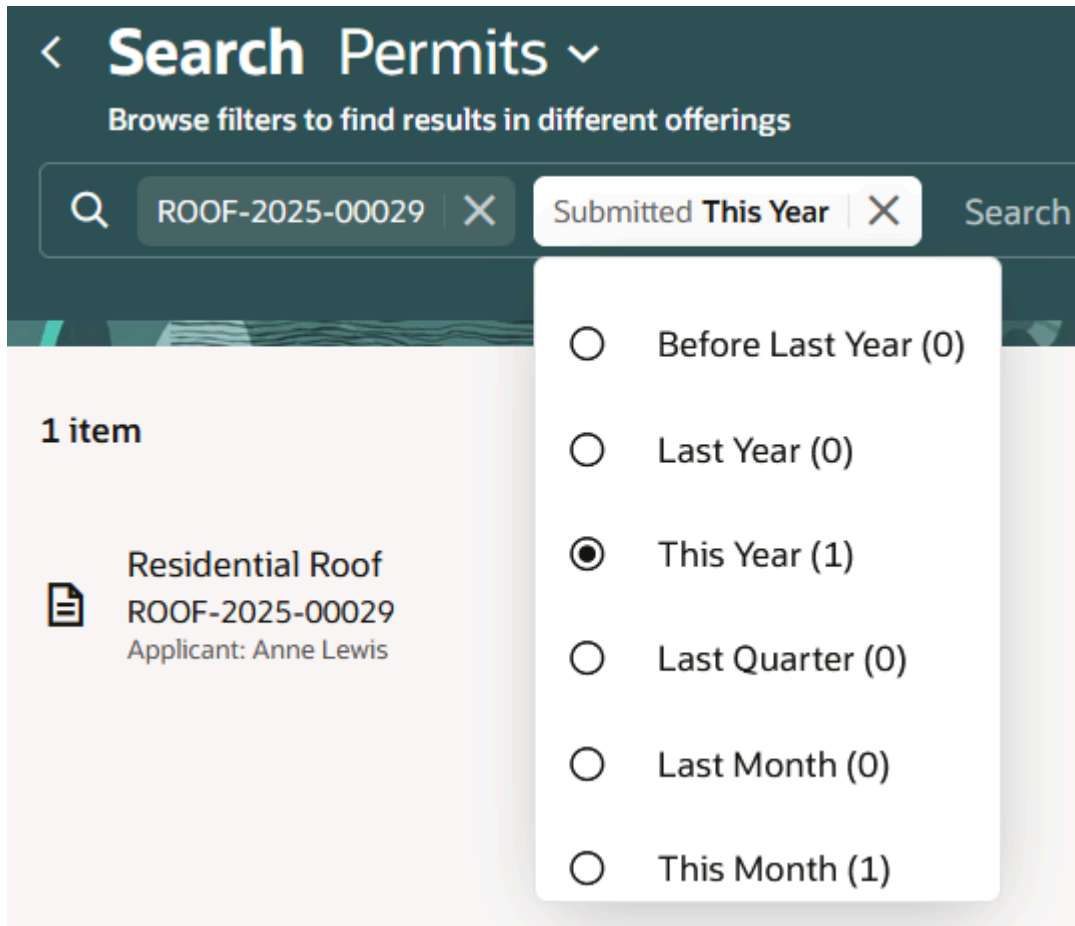
To use search:

1. Enter your free-form text search, such as Roof and click search.

2. Use the filter chips to further refine your search results.

Depending on the content you are searching for, the filter chips for that content type can be different. Click the filter chip and select the value you want to use to refine your search.

For example, you can filter by status, when a transaction was submitted, when a transaction was created, and so on.



For more information on setting up search indexes, see [Managing Search Indexes](#).

Here's how you can refine your search:

- Click in the **Search** field to see a drop-down list of recent searches.
- Enter alphanumeric characters in the **Search** field to filter the applications in the list. The applications that meet the search criteria are displayed on the page.
- For keyword search, enter "begins with" values when entering fragments. You can also enter full words or full numeric segments (such as numbers between dashes). For example, enter "Comm" for Commercial. Entering "12" will find street numbers starting with 12 and parcel numbers containing the segment "-12-."

For examples, see also [Viewing the Parcel Page](#) and [Managing Applications](#).

## Working with Global Search

On the public user landing page, applicants global search controls are available for Permits, Planning and Zoning, Business Licenses, Inspections, and Code Enforcement incidents, cases, and citations. The controls are available for public users and agency users.

Select what you want to search for, such as Inspections, enter a search term, and click Search.

# 6 Managing the Applications List

## Security Details for Managing Permits

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Permits Inquiry	Allows users to have the agency permit application inquiry duty.	All Agency users
PSC Permits Management	Allows users to manage permits.	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	Provides users elevated access to manage public sector permits.	PSC System Administrator PSC Permits Supervisor PSC System Administrator
PSC Reopen Permits	Allows users to reopen permits.	PSC System Administrator PSC Permits Application Administrator
PSC Contact User	Allows users to manage permits to which they have been assigned as a contact.  Allows users to request renewal for their permits that are about to expire, or are expired.	Applicant and Contacts with full access.
PSC Renew Permits	Allows users to renew expiring permits.	PSC System Administrator PSC Permits application administrator PSC Permit technician PSC Permits supervisor PSC Plan reviewer PSC Planning coordinator

Primary Role	Access Description	Associated Job Roles and Abstract Roles

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](#).

Go to the Permit Applications page and the Planning Applications page.

This example illustrates the All Applications list page for registered public users, showing in-progress applications and filter options.

ORACLE
Home Search 99+

### All Applications Apply Make a Payment

In Progress Applications
Search
AUTO-20261404-00082
Created Last Quarter (470)
Status Inspection (321)
Submitted This Year (581)

**▲ Payment Due**  
194,950,267.23 USD is due for all (319) applications.  
[Make a Payment](#)

1195 items Download Filter

Application ID	Application Type	Activity	Status	Conditions	Billing Account	Address	Parcel	Balance (USD)	Actions
AUTO-MAR2026-00459	CKBLTYPE02	Origination	Submitted			111A OTIS DR, ALAMEDA, TYT_State 9450	74-1200-2-20	123.00	⋮
AUTO-MAR2026-00460	CKBLTYPE02	Origination	Submitted			111A OTIS DR, ALAMEDA, TYT_State 9450	74-1200-2-20	123.00	⋮
AUTO-MAR2026-00461	CKBLTYPE02	Origination	Submitted			2212 SOUTHSORE CENTER C, ALAMEDA,	74-1200-29-5	123.00	⋮
AUTO-MAR2026-00462	BLQAORIGFeeCal	Origination	Payment pending			OTIS DR, ALAMEDA, TYT_State 94501	74-1200-2-20	4.00	⋮
AUTO-MAR2026-00463	CKBLTYPE02	Origination	Inspection			4292 Rhode Island Avenue RIA, HANNA, US	742681955533	123.00	⋮
AUTO-MAR2026-00464	CKBLTYPE02	Origination	Inspection			4292 Rhode Island Avenue RIA, HANNA, US	742681955533	123.00	⋮
AUTO-MAR2026-00465	CKBLTYPE02	Origination	Inspection			4292 Rhode Island Avenue RIA, HANNA, US	742681955533	123.00	⋮
CK-2026-00287	CKPERMITTYPE11	Origination	Submitted			3904 Cabell Avenue RIA, Arlington, US-VA	185231113106		⋮

Licenses
Permits
Planning Applications
All

## Registered User's Application List

From the registered user's landing page, registered public users can access the applications list by clicking the **Account summary** button. On the drawer, click the **Applications** menu item. Use the tabs at the bottom of the page to filter the list: **Licenses**, **Permits**, **Planning Applications**, or **All** applications.

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 in the list. 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 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** option 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 Fees** button is also available in the application details on the Overview page and Fees and Payments page. For more information, see *Working with Fees and Payments*.



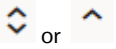
## Using the Applications List

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.




You can use these actions to display permits or planning applications. For more information about working with business license applications, see *Managing License Applications*.


Page Element	Description
Search	Use filter chips or enter key words in the <b>Search</b> bar to apply a filter to applications in the list. The applications that meet the search criteria are displayed on the page. For more information, see the section in this topic, "Searching the Application List."
Apply	Click the button to open the page that asks <b>What would you like to apply for?</b> and search for or select the type of application you want to apply for, including contractor registration or business license, permit, or planning applications, depending on the agency offerings.

Page Element	Description
	For more information, see <a href="#">Choosing an Application Type</a> and <a href="#">Completing an Application</a> .
<b>Make a Payment</b>	Click the button to open the Make Payments page, where agency staff can initiate a payment on behalf of a customer.  For more information, see <a href="#">Making Payments</a> .
	Click the <b>Export</b> icon button to download the list of applications to a .csv file.
	Click to display the Columns window, where you can personalize the display of the grid columns.  You can: <ul style="list-style-type: none"> <li>• Select columns to display.</li> <li>• Deselect columns to hide.</li> <li>• Use drag and drop to adjust the left-to-right order of the columns.</li> </ul> <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"> <li>• You can freeze only the Balance and Actions columns.</li> <li>• You can't freeze columns on the left side.</li> <li>• Adjustments to column size aren't saved.</li> <li>• Search criteria isn't saved.</li> <li>• To restore defaults you'll need to delete the browser cache on the current device.</li> </ul>
	Click the sort icon buttons next to the column names to display the column information in ascending or descending order.

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

Page Element	Description
<b>Application ID and Application Type</b>	View the application ID and application type of the listed applications.
<b>Status</b>	View the badge with the application status, for example, <i>Submitted</i> or <i>Permit Issued</i> .
<b>Conditions</b>	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.  Click the condition name link to open a <b>Condition summary</b> drawer, where you can view the details of the conditions applied to the application.

Page Element	Description
<b>Relationship Type and Relationship Details</b>	<p>(Permits only) Agency staff can 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. For more information, see <a href="#">Linking Primary and Subapplications</a> and <a href="#">Working with Linked Permits</a>.</p> <ul style="list-style-type: none"> <li>Primary Applications: Click the <b>View Subapplications</b> link to open the <b>View subapplications</b> drawer, which lists the selected primary application at the top, followed by all the linked applications.</li> </ul> <p>The <b>View subapplications</b> drawer allows you to:</p> <ul style="list-style-type: none"> <li>Identify the application that you are currently viewing from the icon  next to it.</li> <li>Establish a link with another existing application or remove link from a linked application.</li> </ul> <ul style="list-style-type: none"> <li>Subapplications: Click the <b>Primary: &lt;application ID&gt;</b> link to access the primary permit application that is linked to the selected subapplication. The system displays <i>Primary: Not defined</i> until the subapplication is linked to a primary permit.</li> </ul>
<b>Property Parcel</b>	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.
<b>Description</b>	View the description of the application entered on the application form or on the Overview page in the permit or planning application details.
<b>Applicant</b>	View the name of the applicant. This may not be the same as the person who created the request.
<b>Created On</b>	View the date when the application was started or created.
<b>Submitted On</b>	View the date when the application was submitted.
<b>Expiration Date</b>	View the date when the application expires.
<b>Total Fees (USD) and Balance (USD)</b>	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 <b>Pay fees</b> drawer.
<b>Planner</b>	(Planning applications only) View the planner assigned to a planning application. This field appears only on the <b>Planning Applications</b> list.
	<p>Click the <b>Resubmit</b> 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 <b>Resubmit</b> button to retry initiating workflow.</p> <p>Resubmitting the application doesn't affect the fee calculations.</p>
	Click the <b>Expiration</b> icon button to view expiration information on the <b>Expiration</b> drawer.

Page Element	Description
	<p>Click the three-dot <b>Actions</b> icon button to view the available actions for the application. Select from these options:</p> <ul style="list-style-type: none"> <li>• (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 <b>Applying for Subapplications</b> in <i>Working with Linked Permits</i>.</li> <li>• <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>.</li> <li>• (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>.</li> <li>• <i>Withdraw Application</i>: Click to withdraw an application. For more information, see <i>Withdrawing an Application</i>.</li> <li>• <i>Cancel Application</i>: This action is available only for applicants and agency staff. Click to cancel an application with a pending or payment pending status. The button appears only when the application has a pending status. For more information, see <i>Canceling an Application</i>.</li> </ul> <p>The <b>Pay Fees</b> action is available when there is a balance due in the <b>Balance (USD)</b> column. Click to select fee items on the Pay fees drawer then proceed to pay. For more information, see <i>Making Payments</i>.</p>

## Searching the Applications List

The applications list features Smart Search. Let's take a look at some considerations when using Smart Search to find applications in the list:

Search Filters	Description
<b>In Progress Applications</b>	The default search filter on the applications list. Displays active applications that aren't in a closed or ending status. For example, active applications have statuses including in process, pending submittal, payment pending, submitted, inspection, and so on.
<b>Status</b>	<p>Only displays the option to filter on statuses based on the applications currently displayed in the list.</p> <p>If you have <b>In Progress Applications</b> and <b>Status</b> filters operating together, close the in progress applications to filter by closed or ending statuses, such as withdrawn or void.</p>
<b>Created and Submitted</b>	<p>Select from these options to filter based on the date when applications were created or submitted:</p> <ul style="list-style-type: none"> <li>• Before Last Year</li> <li>• Last Year</li> <li>• Last Quarter</li> <li>• This Year</li> <li>• Last Month</li> <li>• This Month</li> <li>• This Quarter</li> <li>• Last Week</li> </ul> <p>Use the date filters because entering dates won't return results.</p>

Here's how you can refine your search:

- Click in the **Search** field to see a drop-down list of recent searches.
- Enter alphanumeric characters in the **Search** field to filter the applications in the list. The applications that meet the search criteria are displayed on the page.
- For keyword search, enter "begins with" values when entering fragments. You can also enter full words or full numeric segments (such as numbers between dashes). For example, enter "Comm" for Commercial. Entering "12" will find street numbers starting with 12 and parcel numbers containing the segment "-12-."

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.

## Updating an Application

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

If an application has a pending status, the applicant can make updates 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.

Here's how agency staff can update an existing application from the applications list:

1. Click the row for the selected application on the applications list to open the details.
2. Go to the page for the information of the existing application that you would like to update, using the links in the left navigation panel. The actions vary by your role and the specific page.

For more information, see [Permit Details Topics](#), [Navigating to Planning Application Details](#), and [Navigating to Business License Activity Details](#).

## Accessing Application Details

You can access application details from the Applications list pages.

Click the row for the selected application on the respective applications list page.

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

Click the **Go to** link at the top of the overview page in the application details to go back to the list of applications where you clicked the application row.

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

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

For more information about business license activity details, see [Viewing a Summary of Business License Activity](#).

## Copying an Application

Agency staff and applicants can copy existing permit, planning applications, or business license applications into new ones using the Copy Application action. You select which attributes to copy from the source application.

Applicants can copy their own applications from the Applications page. Agency staff with the appropriate 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
<b>Copy From</b>	Displays the application ID and the application type of the source application.
<b>Copies</b>	<p>Use the <b>Increment</b> and <b>Decrement</b> 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 <i>Setting Up Agencies</i>.</p>

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

Page Element	Description
<b>Expand All, Collapse All</b>	Click the button to expand or collapse the application information respectively for each copy.
<b>Applicant</b>	<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><b>Note:</b> Registered public users can't change the applicant.</p>

Page Element	Description
<b>Create Applicant</b>	Click the button to register a new applicant if you don't find the applicant you want in the drop-down list of applicants.
<b>Application Type</b> (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.
<b>Description</b>	Review and optionally modify the description of the source application to create the description for the new application.
<b>Link to &lt;Source Application ID&gt;</b>	Turn on this switch to link the new application to its source application.
	Click the <b>Delete</b> 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 <b>Copies</b> field.

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

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

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

Page Element	Description
<b>Application Details</b>	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).  If the new application type is different from the source application type, copying only occurs for sections that exist in both the application types.
<b>Contacts</b>	Select this checkbox to copy the contacts from the source application.  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.
<b>Contractor</b>	Select this checkbox to copy contractor and authorized agent information from the source application.

Page Element	Description
	<p>Copying adds the contractor license number to the new application. If the license number exists in the main contractor records, then the rest of the contractor data is pulled from the main records into the new application. If the license number doesn't exist in the main contractor records, then all data is copied from the source application.</p> <p>The authorized agent data indicates if the applicant is an authorized agent for the contractor. The logic for copying this data depends on how the applicant information is handled:</p> <ul style="list-style-type: none"> <li>○ If a public user copies an application, and the user's account profile indicates that the profile is for a contractor, the authorized agent data is copied.</li> <li>○ If agency staff copies from a planning preapplication to a regular application, the applicant information and authorized agent data is copied.</li> <li>○ If agency staff copies from a regular application to another regular application, the applicant information is not copied, and therefore the authorized agent data isn't copied.</li> </ul> <p>If the new application type doesn't include the contractor and authorized agent predefined field groups, the data isn't visible in the intake form, but it's still copied to the new transaction.</p>
<b>Property</b>	<p>Select this checkbox to copy the property information from the source application. Not applicable to business license transactions.</p> <p>If the new application type doesn't include the Property predefined field group, property information is not visible in the intake form, but it's still copied to the new transaction.</p>
<b>Reference Entity</b>	<p>Select this checkbox to copy the linked reference entities from the source permit application. Available only for permit applications when reference entities are both linked to the source permit and supported by the target application type.</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.

### Permit application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Cancel Permit Application	Allows an agency user to cancel a pending permit application.	PSC Registered Public User PSC Principal Planner PSC Permits Supervisor PSC Permit Technician PSC System Administrator

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

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

## 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 **Permits** tile on the agency springboard.

2. On the **Permit 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.

You can withdraw permit applications with one of these statuses:

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

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

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 Permit Application	Allows an agency user to withdraw a permit application after submission.	PSC Principal Planner PSC Permits Supervisor PSC System Administrator PSC Permit Technician

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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 **Permits** tile on the agency springboard.
2. On the **Permit 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:
  - o **Manage Links** - This button is for permits only. Click to manage the primary application and subapplications that are affected when you withdraw the permit.
  - o **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.
  - o **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
<b>Update Workflow Activity Name</b>	Select a workflow task from the available options.  <b>Note:</b> 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.
<b>Update Transaction Status</b>	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.
<b>Update Expiration Date</b>	(Permits only) Enter a new date to provide an updated expiration date.  <b>Note:</b> Only permits that had an associated expiration date associated with it before it was reopened will display this field.
<b>Reopen Reason</b>	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.



# 7 Managing the Permit Application

## Permit Details Topics

The following topics apply to using the pages that contain details about a permit application, which both registered users and agency staff can access online to manage the permit. You can manage property information, contacts, fees and payments, linked permits, and much more using the various application pages.

You can find information about working with a permit application in these topics and more:

- *Changing the Applicant on an Application*
- *Viewing the Permit Overview*
- *Viewing Permit Application Details*
- *Working with Property Information*
- *Working with Linked Permits*
- *Working with Linked Reference Entities*
- *Working with Application Attachments*
- *Working with Application Conditions*
- *Working with Related Transactions*
- *Working with Permit Conditions of Approval*
- *Working with Fees and Payments*
- *Plan Review Overview*
- *Overview of Working with Inspections*
- *Viewing Application Status History*
- *Viewing Recorded Time for an Application*
- *Working with Application Contacts*
- *Working with Contractors and Agents in Applications*
- *Working with Communications*
- *Working with Comments*
- *Viewing Project Summaries*

## Viewing the Permit Overview

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

When you access the details for a permit, you see a summary of the permit activity.

The header of the summary page displays an indicator if the permit is a primary or subapplication. On primary permits, you can see a link with the number of permit subapplications that are added to the primary permit. Clicking the link opens the Linked Permits page to show the permit subapplications that are linked to the permit. The header also displays the address of the primary parcel and its physical location on a map. This information is updated to show the latest activity. For example, when the primary parcel address detail is modified on the Property Information page, the same is automatically updated in the header and in the permit Overview page.

Only agency staff can update the date the application was received or withdraw an in-progress application on the Overview page. Both agency staff and the applicant can add a description of the application.

**Tip:** As agency staff, you can access this page on a phone as well as on a laptop or desktop computer. The layout and some functionality change based on the device you are using.

## Using the Overview Page

1. Navigate to **Permits > Permits** or click the **Permits** tile on the Agency Springboard.
2. On the Permit Applications page, click the row for a selected permit to open the Overview page.
3. On the Overview page, review details or enter information in the **Overview** section:

Page Element	Description
<b>Application ID</b> and <b>Application Type</b>	Review the unique identifier for the application and its type.
<b>Status</b>	Review the application status.
<b>Conditions</b>	Review the conditions applied to the application. Click the condition link to open a <b>Condition summary</b> drawer, to view the details.
<b>Relationship Type</b>  <b>Remove link</b>	<p>Select a relationship type for the permit:</p> <ul style="list-style-type: none"> <li>○ <i>Independent</i>: The permit is neither primary nor subapplication.</li> <li>○ <i>Primary</i>: The permit changes to primary application. You can use the <b>Actions</b> menu to select <i>Apply for Subapplication</i> for linking new subapplications or select <i>Link Subapplication</i> to link existing subapplications.</li> <li>○ <i>Subapplication</i>: The permit changes to subapplication. You can link a primary permit using the <b>Edit</b> button in the <b>Primary Application</b> field.</li> </ul> <p>The <b>Remove</b> link appears for permits that are of the type Primary or Subapplication. Click the link to change the permit type to Independent.</p> <p>Once you link a primary permit to the subapplication, the application can't be changed to primary relationship type. Similarly, when you link a subapplication to the primary permit, the application can't be changed to subapplication relationship type. You can only make the application independent by clicking the <i>Remove</i> link, which will remove the existing links between associated applications.</p>

Page Element	Description
	<p><b>Note:</b> The relationship type is view-only for registered public users.</p>
<p><b>Primary Application</b></p>	<p>Review the primary application that is linked to the current subapplication. Click the link to open the permit detail in a separate browser tab. To change the primary permit, click the <b>Edit</b> button and select a permit from the list.</p> <p>When there is no primary permit linked, you will see the text—<i>Not Defined</i> and the page's header displays a warning <i>This subapplication isn't linked to a primary permit</i>. Click the <b>Edit</b> button to open the Link Primary modal page and link a primary permit.</p> <p>This field appears only for subapplications. See the section <b>Linking Primary Permit to Subapplication</b> at the end of this topic.</p> <p><b>Note:</b> This field is view-only for registered public users.</p>
<p><b>Submitted By</b></p>	<p>Review the name of the user who submitted the application and the submission date.</p>
<p><b>Completed Date</b></p>	<p>Review the date the application was completed.</p>
<p><b>Description</b></p>	<p>Enter a description of the application by clicking the <b>Add</b> link in the <b>Description</b> field. The agency staff or applicant can add a description.</p>
<p><b>Received Date</b></p>	<p>Review the date when the permit application was received. Agency staff enters the date, which is on or before the submission date, when filling out the intake form on behalf of the applicant. Agency staff can update the received date here on the Overview page.</p> <p>For applicants submitting their application online, the received date field isn't available in the intake form or on the Overview page.</p>
<p><b>Issue Date</b></p>	<p>Review the date when the agency issued the permit.</p> <p>Your administrator's setting in the <b>Issuance and Reissuance Dates</b> field on the Permit Options page determines whether the issue date or the most recent reissue date is displayed. For details, see <a href="#">Setting Up Agency-Level Options for Permits</a></p>
<p><b>View History</b></p>	<p>Click the link to open the Permit Issuance History page and view the list of permit issue and reissue dates history—with permit status and the staff who updated the record. The name of the staff is not visible to public users.</p>

Page Element	Description
<p><b>Reissue Date</b></p>	<p>Review the date when the agency reissued the permit most recently.</p> <p>This field is visible only if the Track Both Dates option is selected from the <b>Issuance and Reissuance Dates</b> field on the Permit Options page. This date is used for the expiration date calculation based on the expiration rule definition and agency option settings. For details, see <a href="#">Setting Up Permit Expiration Rules</a> and <a href="#">Setting Up Agency-Level Options for Permits</a>.</p>
<p><b>Expiration Date and Extend</b></p>	<p>Review the expiration date of the application.</p> <p>If the <b>Extend</b> link is available next to the <b>Expiration Date</b> field, agency staff can enter a new expiration date that allows more time before the application or permit expires. You must have appropriate permissions associated with your role to manually extend a permit.</p> <p>Expiration date for a reissued permit: The system compares the newly calculated expiration date with the expiration date set at the time of permit issuance. The date that is resulting in a longer expiration due period is applied.</p> <p>For example, if the expiration date calculated at reissuance is January 8 and the expiration date at the time of permit issuance was January 12, then the expiration date applicable for the reissued permit will be January 12.</p> <p>Expiration notifications appear below the expiration date. Depending on how the agency set up the expiration rules for the permit type, you'll see a notification that the application expires in the displayed number of days.</p> <p>For more information about working with application expiration, see <a href="#">Expiration Overview</a> and <a href="#">Working with Application Expiration</a>.</p>
<p><b>Permit Period and Permit Status</b></p>	<p>When a permit is issued for the first time, you can view the period for which the permit was issued, and its status.</p> <p>Every time a permit is renewed, the permit period is updated.</p>
<p><b>Actions</b></p>	<p>Click to select an option:</p> <ul style="list-style-type: none"> <li>○ <i>Apply for Subapplication</i>: Create up to 5 new subapplications by copying selected details from the current application.</li> </ul> <p><b>Note:</b> This action is available only for primary permits and for permits that are neither primary nor subapplication. After such a standalone permit is marked as a subapplication, this action is not available.</p> <p>For more information about applying for an application, see <a href="#">Working with Linked Permits</a>.</p>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Copy Application</i>: Copy the details of the current application to up to 5 new applications. You can also establish a link between the current application and the copied applications.  For more information about copying an application, see <a href="#">Copying an Application</a>.</li> <li>○ <i>Link Subapplication</i>: Link an existing primary permit to your subapplication. See the "Linking Primary Permit to Subapplication" section at the end of this topic.</li> </ul> <p><b>Note:</b> This action is available only for primary permits and for permits that are neither primary nor subapplication. After such a standalone permit is marked as a subapplication, this action is not available.</p> <ul style="list-style-type: none"> <li>○ <i>Withdraw Application</i>: Change the application to a withdrawn status. When you withdraw an application, any scheduled inspections or plan reviews are canceled.  For more information about withdrawing an application, see <a href="#">Withdrawing an Application</a>.</li> <li>○ <i>Print Permit</i>: Click to view the printable building permit. This button appears only after the permit is issued.</li> </ul> <p><b>Note:</b> This option is available for public users by default. You turn off the <b>Allow Public User to View</b> switch on the Permit Type page to make this option unavailable for public users. Also make sure your browser allows pop-up windows if you can't view the permit.</p> <p>See <a href="#">Setting Up Permit Types</a>.</p>

4. Review information about the selected permit in the sections and navigate to more details:

Page Element	Description
<b>Contacts</b>	<p>View the details of the primary contact and the name of the applicant.</p> <p>Click the <b>View Details</b> link to open the Contacts page, where you can add additional contacts.</p>
<b>Workflow</b>	<p>View a list of active and recently completed tasks, including the task status, assignment, last updated date, and number of days in the current status.</p> <p>Click the <b>View Details</b> link to open the Workflow page.</p>
<b>Inspections</b>	<p>View the number of scheduled, upcoming, and completed inspections, as well as the number of inspections that have passed and failed.</p> <p>Click the <b>View Details</b> link to open the Inspection List page.</p>
<b>Fees and Payments</b>	<p>View the total fees paid, amount due, and the date and amount of the last payment.</p> <p>Click the <b>View Details</b> link to open the Fees and Payments page.</p>

Page Element	Description
<b>Projects</b>	<p>View the projects to which this permit belongs.</p> <p>Click the <b>View Details</b> link to open the Projects page, where you can see the list of projects in more detail. Click the <b>Project ID</b> link to find out more about the project, which may contain other permits.</p> <p>The Projects section is available only when the permit is associated with a project.</p>
<b>Conditions of Approval</b>	<p>Review all the conditions of approval applied to the permit at various stages of the project, which are determined by the compliance period set up. If no conditions of approval are applied to the permit, a <b>Apply Conditions of Approval</b> link is available to apply new conditions.</p> <p>Click a dial to open the Conditions of Approval page, where you can see the list of conditions applied for the specific compliance period. You can use the <b>Resolve</b> switch to resolve the condition.</p> <p>See <i>Working with Permit Conditions of Approval</i>.</p>

**Note:** If you're using a phone, you can review a summary and access details for fees and payments, and projects, from the Overview page. For complete details, access permit applications using a laptop or desktop computer.

## Linking Primary Permit to Subapplication

You can link an existing primary permit to your subapplication from the Overview page:

1. Click the **Edit** button next to the **Primary Application** field to open the Link Primary page. The header displays the current permit application ID, property, and the Subapplication badge.
2. The Link Primary page lists only the primary and independent permits that are associated with the property selected in the intake form. To view primary permits from all the available properties, enable the **All properties** checkbox. Enable the **All statuses** checkbox to view all permits other than in statuses—canceled, withdrawn, or denied. You can click the application link to open the application detail in a new tab of your browser.
3. Select a primary permit application and click **Save**.

Use the Search field to find a specific primary permit application. Click the **Display Settings** icon to personalize the grid to suit your own preference. For details, see *Personalizing Grid Displays*.

## Changing the Applicant on an Application

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

The applicant designation is managed on the Contacts page in the application details, where the current applicant appears along with the previous applicant, if any, and other contacts. You can only change the applicant to another active, registered contact 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 the *Make Applicant* option.
6. On the **Confirm applicant update** modal page, review and enter this information:

Page Element	Description
<b>New Applicant</b>	Displays the name of the contact who will be the new applicant.
<b>Previous Applicant</b>	Displays the name of the person who was formerly the applicant.
<b>Active</b>	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.
<b>Contact Type</b>	Select a contact type.  When you turn on the <b>Active</b> 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.
<b>Access</b>	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"> <li>○ <i>Full</i></li> <li>○ <i>View, pay, and print</i> (available only for license application contacts)</li> <li>○ <i>None</i></li> </ul> If the previous applicant is an inactive contact, the access level is <i>None</i> .

7. Click **OK**.

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

#### Related Topics

- [Working with Application Contacts](#)

## Viewing Permit Application Details

You review information captured during the application intake that is specific to the permit type in the application details. Some agency staff can update the permit details captured from the application.

When an agency designs the application form for a specific type of permit, they use elements that capture the information necessary for evaluating adherence to permit requirements. For example, for a solar permit, an applicant would enter data about the job (type of work, job cost, and so on) and solar details (type of roof, roof area, number of solar panels, and so on). These application details are reflected on the Application Details page for the permit.

Permit Application Details	Description
Construction Information	Captures Information regarding the current construction site and the proposed construction project.
Demolition	Captures information related to the scope of the demolition and if hazardous materials or utilities need to be considered—such as electricity, gas, water, and so on—when demolition is required as part of the job.
Electrical Equipment	Describes electrical features, such as outlet types, amps, voltage, and electric appliances.
Fence Information	Describes the proposed fence attributes, such as type, material, dimensions, location, and so on.
Grading Information	Describes the scope of grading work, such as the acreage affected, materials to be used and the amount of material.
Insurance	Provides a contractor's insurance type and policy information.
License Qualification	Enables a contractor to add any state licenses they have.
Mechanical Equipment	Describes features of the job site related to ventilation, heating, cooling, fire safety, and so on.
Photovoltaic Information	Describes attributes of a site's solar energy configuration, such as roof area, coverage area, inverter information, and so on.
Plumbing Equipment	Describes attributes of a site's plumbing configuration.
Pool Information	Describes attributes of a pool, such as type, depth, location, surrounding fencing, and so on.
Property Information	Describes the parcel as it is registered with the municipality, such as the parcel ID, parcel type, and so on.
Regulated Business Activity	Enables you to specify any regulated activity or controlled substances allowed on the premises, such as alcohol, carnival rides, casino games, and so on.

Permit Application Details	Description
Right of Way Use	Enables you to provide any details related to the use of a right-of-way on the property or to gain access to the property, such as traffic, parking, or pedestrian impact.
Roof	Describes features of a structure's roof, such as existing roof type, proposed roof type, number of layers, and so on.
Site and Zoning	Describes features of the property related to acreage, flood preparedness, as well as zoning and land usage information.
Special Event	Enables applicants to specify information about an event, including the safety plan, concessions, facilities, potential impacts, and traffic plans.
Yard Sale	Enables applicants to specify yard sale information, such as the start time, end time, and the number of days.

## Updating Permit Application Details

The fields available to update depend on the permit details on the application form.

1. Select the **Permits** tile on the agency springboard.
2. On the Permit Applications list page, click the row for the permit application you are working with.
3. Under the expanded **Application** menu section in the left navigation panel, click **Application Details**.
4. On the Application Details page, click the **Edit** button.
5. Update available fields on the page.
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
<b>Type</b>	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.
<b>Address</b> <b>Condition</b> (address condition) <b>Primary Address</b>	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 <a href="#">Setting Up Property Addresses</a> . 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> .
<b>Parcel</b> <b>Condition</b> (parcel condition) <b>Identifier</b> <b>Description</b> <b>Primary Parcel</b>	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 <a href="#">Updating Parcel Information</a> . 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> .
<b>Owner</b> <b>Primary Owner</b>	Displays the property owner name.  Indicates whether the owner is the primary owner. Value is <i>Yes</i> or <i>No</i> .
<b>Comments</b>	Displays comments about the property. Comments associated with the property can only be viewed by agency staff.
<b>Actions</b>	Click the <b>Edit</b> button to open the Property details drawer.

Page Element	Description
	Click the <b>Delete</b> button to remove the property information.

## Adding Property Information

Depending on your agency setup, 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.

If your agency has set up GIS to Property Import Mapping, you can select a property to associate with the application in three ways:

1. Enter address information in the type-ahead **Search** field and press Enter to search for and select a property from the addresses displayed in the drop-down.

This search is performed on the associated map layer and matching addresses are directly searched and displayed from the map layer. When the property is selected, it is also automatically added and updated to the internal property information reference.

2. Click **Select from Map** to view a map and select the location.

The map view is simplified, and you can only select a map property from the map layer from this page. The selected property is added to the grid and also to internal system tables. If the selected property information is not in the system's tables, new records are created. If the property already exists in the system, then it is updated.

3. Click **Create New** to add a property that doesn't exist in the system already. This property information is associated exclusively with the transaction and is not synced up with internal property information reference tables.

Your agency can integrate ESRI with the Permitting and Licensing system to enable real-time import of Address, Parcel, Owner, and Parcel District information. For more information, see [Setting Up GIS to Property Import Mapping](#).

## 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 Linked Permits


Use the Linked Permits page to view all the permits that are linked to your permit application. If the intake form for the application collected the primary permit or subapplications, then the Linked Permits page initially lists those multiple applications provided during the intake process.



The permit detail displays the Linked Permits page only if the source permit is the primary permit or it is a subapplication that is linked to a primary permit. Applicants and agency staff use this page to manage the application links.

## Viewing Linked Permits

View the list of permit applications linked to the current permit application.

1. Access the detail page for the permit you are working with.
2. Click the **Linked Permits** link in the left panel to view the Linked Permits page.
3. Review the details of the linked applications:

Page Element	Description
<b>Apply for Subapplication</b>	Click the button to open a drawer from where you can create a new subapplication for the primary permit application.  For details, see the section on 'Applying for Subapplications'.
<b>Link Subapplication</b>	Click the button to open a drawer from where you can select applications to be linked to your primary application.  For details, see the section on 'Linking Subapplications to Primary Permit'.
<b>Relationship Type</b>	Indicates the relationship between the linked applications.
	Indicates that the record is the current application.
<b>Application</b>	View the unique identifier for the linked permit application.  <b>Note:</b> The primary permit record always appears at the top of the list, followed by the permit subapplications that are linked to the primary permit.
<b>Application Type</b>	View the type of the linked application.
<b>Status</b>	View the status of the linked application.
<b>Condition</b>	View the condition applied to the linked application. Click the condition link to open a <b>Condition summary</b> drawer, to view the details.
<b>Fees</b>	Displays if there is balance due for the linked application. Click the link to open a drawer from where you can view the fee details for the application.

Page Element	Description
<b>Property</b>	View the property address of the linked application.
<b>Description</b>	View the description of the linked application.
<b>Created</b>	View the name of the person who created the linked application.
<b>Submitted</b>	View the date on which the application was submitted.
<b>Issue Date</b>	View the date when the agency issued the permit.
<b>Expiration</b>	View the expiration date of the linked application.
<b>Actions</b> 	Click the Pay icon to open the Pay fees drawer, review the details, and click <b>Proceed to Pay</b> to access the <b>Checkout</b> page.
	Click the Remove Application Link icon to remove the link from the permit application. This action will remove the record from the list.  <b>Note:</b> If your current application is a subapplication and if you remove the link to its primary application, then the current application will no longer be a subapplication.

## Applying for Subapplications


Applicants and agency staff can create new subapplications from the primary permit application that they are working with. Click the **Apply for Subapplication** action from any of the following locations:

- Permit Applications list page: Click the **Actions** menu on your primary permit record and click the **Apply for Subapplication** option.
- Header of the permit application detail pages: Click the **Actions** menu and click the **Apply for Subapplication** option.
- Linked Permits page in the primary permit details: Click the **Apply for Subapplication** button.

**Note:** The **Apply for Subapplication** action is available only for primary permits and for permits that are neither primary nor subapplication. After such a standalone permit is marked as a subapplication to a primary permit, this action is not available.

Here's how to apply for a subapplication:

1. On the **Apply for subapplication** drawer, review the details in the **Copy From** section and enter values:

Page Element	Description
<b>Copy From</b>	Review the details of the source primary permit.
	Enter the number of subapplications you want to create or use the increment and decrement buttons to set a desired value. You can create up to 5 subapplications at a time.

2. Review the details in the **New Subapplications** section and enter details for each copy of the subapplication:

Page Element	Description
<b>Applicant</b>	<p>Select the applicant using the lookup prompt.</p> <p><b>Note:</b> For registered users, the applicant detail will be copied over from the source application and can't be changed.</p>
<b>Application Type</b>	Search and select the application type using the lookup prompt.
<b>Description</b>	Enter any detail to update the description for new application.
<b>Copying</b>	<p>Select the details you want to copy from the source primary permit application:</p> <ul style="list-style-type: none"> <li><input type="radio"/> Application Details</li> <li><input type="radio"/> Contacts</li> <li><input type="radio"/> Contractor</li> <li><input type="radio"/> Property</li> </ul>

3. Click **Save**. The modal window closes and the Transactions page refreshes to list the newly added subapplications in *Pending* status. The new subapplications are automatically linked to the source primary permit. You can click on the record to open the application, make changes, review, and submit.

**Note:** If you are creating only one subapplication, then the application intake form opens for you to make updates, review, and submit it.

## Linking Subapplications to Primary Permit

You can link existing permit subapplications to your primary permit application using the Link Permits page.

Access the Link Permits page from any of these locations:

- Linked Permits page: Click the **Link Subapplication** button.
- Primary permit's Overview page: Click the **Update Relationship** button and click Link Subapplication.
- Permit Applications list page: Click the **View Subapplications** link in the primary permit record and click Link Subapplication.

Here's how to link permits:

1. The Link subapplications page lists only the non-primary permit applications that are associated with the property selected in the intake form. The header displays the current permit application ID, property, and the Primary badge. To view eligible permits from all the available properties, mark the **All properties** checkbox. Enable the **All statuses** checkbox to view all permits other than in statuses—canceled, withdrawn, or denied. You can click the application link to open the application detail in a new tab of your browser.
2. Select one or more applications using the checkboxes and click **Save**.

Use the Search field to find a specific primary permit application. Click the **Columns** icon to personalize the grid to suit your own preference.

See [Linking Primary and Subapplications](#).

## Working with Linked Reference Entities

Entities selected on the permit application intake form appear in the list of linked reference entities in the permit application details. The permit detail displays the Reference Entities page only if the agency has set up reference entities for use with the different permit types.


Once an application is submitted, only authorized agency staff can manage the reference entities linked to a permit. For more information, see [Reference Entity Overview](#).

The reference entity details that your agency collects are saved as part of the permit history.

On the Reference Entities page, click **+ Link** to add a link to a predefined reference entity to the list of referenced entities.

Let's take a look at the reference entity information that's collected:

Page Element	Description
<b>Location</b>	The location provided by the agency for the referenced entity.
<b>ID</b>	The unique reference entity ID generated when the agency set up the reference entity. Agency staff can click the ID link to open the reference entity record details.
<b>Name</b>	The name of the reference entity.
<b>Reference Entity Type</b>	The type of reference entity.
<b>Status</b>	Indicates whether this reference entity is active.

Page Element	Description
<b>Description</b>	The reference entity description.
	In the <b>Actions</b> column, authorized agency staff can click the unlink icon to remove a reference entity from a permit. If the reference entity is associated with inspections, the system validates the inspection status before unlinking. When active inspections exist, users must confirm the action, the reference entity will be unlinked from the permit and removed from active inspections. If only completed inspections exist, the reference entity is unlinked from the permit while references on completed inspections are retained. Public users can't unlink reference entities after application submission. All unlinking actions are saved as part of the permit history.

Click the **Edit** button to update the list of linked reference entities.

After linking a permit to at least 1 reference entity that has been set up by the agency to be inspectable, agency staff, applicants, and contacts with application access can select entities when scheduling an inspection to be more specific about what should be inspected. For more information, see [Requesting and Scheduling Inspections](#).

## 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 as well as license activity displayed using the Redwood Experience.

The page tabs and elements may vary on the Attachments page depending on the type of application, transaction, 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. The Attachments page for license activity displays the **Business License**, **Inspection**, and **All** 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

<input type="checkbox"/>	Upload	File Name	File Size	Description	Uploaded By	Uploaded On	Category	Actions
<input type="checkbox"/>		<a href="#">3D_Property.pdf</a>	360.53 KB	Plan documents for property	sam cook	4/14/25 6:15 PM	Documents	...
<input type="checkbox"/>		<a href="#">ContractorCertificate.pdf</a>	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*.

Here's information about the license activity attachments tabs:

- The **Business License** tab displays attachments added through the license activity's Attachments page. The Business License tab also displays the Required Documents section when required documents are configured for the license activity. The required documents are determined by the document group assigned to the current activity: origination, renewal, or amendment.
- The **Inspection** tab displays attachments that business license 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, and web form responses.

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 as well as license activity.

### Permit Applications

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	<p>Add and update attachments to submitted permits until they are closed.</p> <p>View all attachments on applications for which the user is the applicant.</p>	PSC Registered Public User

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Permits Inquiry	View permit attachments.	PSC Agency Staff – All agency users
PSC Permits Attachments User	Add attachments to permits.  Update and delete attachments added by themselves.	PSC Inspections Supervisor  PSC Geographical Information System Administrator  PSC Finance Administrator  PSC Economic Development Officer  PSC Chief Building Officer  PSC Cashier  PSC Building Inspector  PSC Apply Permit Duty  PSC System Administrator  PSC Principal Planner  PSC Planning Coordinator  PSC Plan Reviewer  PSC Permits Supervisor  PSC Permit Technician
PSC Add Permit Attachments	Add permit attachments.	PSC Inspections Supervisor  PSC Geographical Information System Administrator  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

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

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

### 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.  View all attachments on applications for which the user is the applicant.	PSC Registered Public User
PSC Agency Planning and Zoning Inquiry	View planning and zoning attachments.	PSC Agency Staff – All agency users
PSC Add Planning and Zoning Attachments	Add planning and zoning attachments.	PSC Planning Application Management with Elevated Access PSC Planning Attachments User Duty PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Cashier PSC Principal Planner PSC Plan Reviewer
PSC Update Planning and Zoning Attachments Added by Others and Self	Update planning and zoning attachments added by others and by themselves.	PSC System Administrator
PSC Update Planning and Zoning Attachments Added by Self	Update planning and zoning attachments added by themselves.	PSC Planning Attachments User Duty PSC Apply Planning and Zoning Duty PSC Zoning Administrator PSC Planning Assistant

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Principal Planner PSC Plan Reviewer

### License Applications

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Add and update attachments on business license applications until they are submitted.  View all attachments on applications for which the user is the applicant.	PSC Registered Public User
PSC Administer Public Sector Business License Transaction Confidential Data	Allows users to administer confidential data for business license transactions.	PSC Business License Application Administrator PSC System Administrator PSC Treasury Administrator
PSC Manage Public Sector Business License Transaction Confidential Data	Allows users to manage confidential data for business license transactions.	PSC Auditor PSC Business Analyst PSC Business License Manager PSC Business License Specialist PSC Treasury Supervisor
PSC Update Business License Attachments added by self	Enables users to update business license attachments added by themselves.	PSC Business License Inspector PSC Business License Manager PSC Business License Specialist PSC Business Analyst PSC System Administrator Application Implementation Consultant PSC System Administrator
PSC Update Business License Attachments added by self and others	Enables users to update business license attachments added by themselves and others.	Application Implementation Consultant PSC System Administrator
PSC System Administrator	Provides PSC product family administration role.	Application Implementation Consultant PSC System Administrator
PSC Agency Business License Inquiry	Allows agency users to view business licenses.	PSC Agency Staff

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Access Confidential Business Licenses Data	Allows users to access confidential information in business licenses data.	PSC Auditor PSC Business License Manager PSC Business License Specialist PSC Treasury Administrator PSC Treasury Supervisor Application Implementation Consultant PSC System Administrator PSC Business Analyst
PSC Delete Business License Attachments added by self	Enables users to delete business license attachments added by themselves.	PSC Business License Inspector PSC Business License Manager PSC Business License Specialist Application Implementation Consultant PSC System Administrator PSC Business Analyst
PSC Delete Business License Attachments added by self and others	Enables users to delete business license attachments added by themselves and others.	Application Implementation Consultant PSC System Administrator
PSC View Business License Attachments	Enables users to view business license attachments.	PSC Auditor PSC Business License Inspector PSC Business License Manager PSC Business License Specialist PSC Treasury Administrator PSC Treasury Supervisor Application Implementation Consultant PSC System Administrator PSC Business Analyst



**Note:** Applicants and contacts with application access can view and add attachments to their own applications as well as update and delete the attachments they added themselves. Before contacts can manage attachments, your agency must add the PSC Contact User duty role (ORA\_PSC\_CONTACT\_USER\_DUTY) to the PSC Custom Registered Public User role (CUSTOM\_PSC\_REGISTERED\_PUBLIC\_USER) and enable application access for the contact type.

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

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

## Actions for Working with Attachments

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

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




## Viewing Attachment Details

Here's information about the Attachments page in the detail pages for an 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	Business License, Inspections, All Permits, Inspections, All Planning Attachments, Reports	Click the small preview image to open the <b>Attachment details</b> 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.
<b>Upload</b>	Business License 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.
<b>File Name</b>	Business License, Inspections, All Permits, Inspection, All Planning Attachments, Reports	View the filename with file type extension. Click the link to open the attachment preview.
<b>File Size</b>	Business License, Inspections, All Permits, Inspection, All Planning Attachments, Reports	View the file size. For example, 12.95 KB.
<b>Description</b>	Business License, Inspections, All Permits, Inspection, All Planning Attachments, Reports	View the description of the attachment as entered by the person who added the attachment.
<b>Report Name and Report Type</b>	Reports	These columns appear only on the Reports tab of the Attachments page for planning applications.  View the report name and report type of the attachment.
<b>Uploaded By</b>	Business License, Inspections, All 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.
<b>Uploaded On</b>	Business License, Inspections, All Permits, Inspection, All	View the date and time when the person uploaded the file.

Page Element	Attachments Tab	Description
	Planning Attachments, Reports	
<b>Category and Subcategory</b>	Permits, All Planning Attachments	<p>View the document category for the attachment.</p> <p>The category and subcategory are available when a document group is specified during setup for the application type or in the contractor license options.</p> <p>Category and subcategory values are used to satisfy required document setup. When you upload an attachment from a required document card, the system applies the category or category and subcategory associated with the requirement.</p> <p>This field isn't available for code enforcement case attachments.</p>
<b>Protected</b>	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> <ul style="list-style-type: none"> <li> - Edit Protected Document</li> <li> - Archive Protected Document</li> <li> - Archive Protected or Protected Editable Document</li> </ul> <p><b>CAUTION:</b> The system will always prevent you from uploading to an application password-protected documents that require a password to open.</p>
<b>Confidential</b>	Business License	<p>Indicates whether the attachment has limited visibility. The confidential designation is only available for business license attachments and must be enabled at the agency level for business licenses.</p> <p>Applicants and agency staff with permissions can add confidential attachments on business license intake forms, but only agency staff with permissions can add and manage confidential</p>

Page Element	Attachments Tab	Description
		<p>attachments on business license transactions and the business record, including credentials. Only agency staff with permissions, the applicants, and contacts with application access can view confidential attachments on the Attachments page.</p>
<p><b>Source</b></p>	<p>All</p>	<p>View the source of the attached file on the <b>All</b> tab.</p> <p>Valid values can include:</p> <ul style="list-style-type: none"> <li>• <i>Permits</i></li> <li>• <i>Business License</i></li> <li>• <i>Inspection</i></li> <li>• <i>Workflow</i></li> <li>• <i>Plan Reviews</i></li> </ul> <p>Attachments that are added to electronic plan reviews have their source changed from <i>Permits</i> to <i>Plan Reviews</i>.</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> <p>This column appears only on the All tab of the Attachments page for permit and business license applications.</p>
<p><b>Source</b></p>	<p>Inspection</p>	<p>This column appears only on the Inspection tab of the Attachments page for permit and business license applications.</p> <p>View the associated permit ID and whether the building inspector uploaded the file to an inspection checklist, inspection checklist item, or the overall inspection in the Inspector Application.</p> <p>For more information, see <a href="#">Viewing Inspection Documents</a>.</p>
<p><b>Reference</b></p>	<p>Inspection</p>	<p>This column appears only on the Inspection tab of the Attachments page for permit and business license applications.</p> <p>View inspection attachment information:</p> <ul style="list-style-type: none"> <li>• The checklist description for checklist attachments.</li> <li>• The checklist item description for checklist item attachments.</li> </ul>

Page Element	Attachments Tab	Description
		For inspection-level attachments, the field is blank.
<b>Required</b>	Business License Permits Planning Attachments	Indicates whether the attachment satisfies the criteria for a required document. For more information, see <i>Working with Required Documents</i> .
<b>Final</b>	Permits Planning Attachments	Displays Yes when agency staff turn on the <b>Final</b> switch on the Attachment details drawer for application attachments.

You can also navigate between multiple attachments or images on the **Attachment details** drawer by clicking the **Next** and **Previous** arrow buttons.

## Adding 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. If you upload multiple files, you can now use the **Next** and **Previous** buttons on the Attachment Details drawer to quickly navigate between attachments without closing the drawer.

6. Turn on the **Confidential** switch to limit the attachment's visibility. The confidential designation is only available for business license and credential attachments and must be enabled at the agency level for business licenses.

Applicants and agency staff with permissions can add confidential attachments on business license intake forms, but only agency staff with permissions can add and manage confidential attachments on business license transactions and the business record, including credentials. Only agency staff with permissions, the applicants, and contacts with application access can see confidential attachments on the Attachments page.

For more information, see *Working with Business License Attachments*.

7. For **Business license applications**, an **Expiration Date** field is available on the Attachment Details drawer. Use this field to enter the date until which the attachment is valid, if applicable.
8. Click the **Upload** button.

## Working with Required Documents

Your agency can require documents to be attached to the application at different stages of the application cycle.

Depending on agency setup for business licenses, permits, and planning applications, the **Required Documents** section under the Attachments title appears on the application intake form and on the Attachments page in the application details after submittal.

For license applications, required documents can vary by license activity. Your agency can configure one set of required documents for origination, another set for renewal, and another set for amendment. The system applies the required documents from the document group assigned to the current license activity.

Once the application form has been saved, agency staff with permissions can manage the document requirements on the application, such as adding or deleting document requirements and also removing files. Agency staff with permissions can also view override history. Public users can't delete required documents once they have been uploaded for previous application steps.

Example of the Required Documents section on the Attachments page. The fields and tabs vary by application type.

## Attachments

Permits Inspection All

### 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

#### Photo

Required Application Step: Final inspection

Upload



Your agency adds a document group to the application type and the document group includes document categories that are configured to identify the required documents. For more information, see [Setting Up Required Documents](#). The documents are identified by their category or category and subcategory pair as well as the step in the application process when they're needed like this:

Application Step	Description
Submittal (application submittal)	<p>Applicants can't submit the application without adding the specified document first. Only documents required at the Submittal step are required before the applicant can submit the application.</p> <p>If documents were provided on the application intake form, you can view them on the applicable attachments tab, such as the Permits tab, in the application details after submittal. For license activity, required documents appear on the Business License tab.</p>


Application Step	Description
<b>Issuance</b> (application issuance)	The permit or business license can't be issued without this document. This step doesn't apply to planning applications and validation requires workflow setup.
<b>Acceptance</b> (application acceptance)	Agency staff can't accept this document into the system if this document is missing. Validation at this step requires workflow setup.
<b>Final inspection</b>	<p>Inspectors and applicants can't create or request a final inspection if this required document is missing. Agency staff can still create a final inspection in a pending status, depending on agency setup, but can't schedule it until the required document is added.</p> <p>Documents can only be required at this step if your agency uses inspections for permits or business licenses; it doesn't apply to planning applications.</p> <p>For license activity, the system applies the document group for the current activity before validating required documents for final inspection.</p>
<b>Complete</b> (application complete)	The application process won't be complete until this document has been attached.

For license applications, the system first determines the license activity and then evaluates the required document categories in the corresponding document group for the applicable application step.

License Activity	Required Documents Come From
Origination	Origination Document Group
Renewal	Renewal Document Group
Amendment	Amendment Document Group

The **Required documents (<number> of <total> uploaded)** collapsible section appears on the application intake form as well as on the Attachments page in the application details.

Here's how to upload required documents:

Page Element	Description
	<p>Available for agency staff with permission to override the agency setup for required documents on the application type.</p> <p>Click the Add icon button in the required documents section to open the <b>Add required document</b> drawer.</p> <p>Set up the details for the new requirement:</p> <ul style="list-style-type: none"> <li>• <b>Category</b> and <b>Subcategory</b> - Select the required document category and subcategory. The category is a required field.</li> <li>• <b>Comments</b> - Enter comments that appear in the required document override history.</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>• <b>Application Step</b> - The application step is a required field. Select one or more from these steps: <i>Submittal, Issuance, Acceptance, Final inspection, and Complete.</i></li> </ul> <p>For more information, see <a href="#">Setting Up Required Documents</a>.</p>
<b>View Override History</b>	<p>Available for agency staff with permission to override the agency setup for required documents on the application type.</p> <p>Click the button to view the updates made to the document requirements.</p>
<b>Pending or Attached</b>	<p>The badges that display the status of the required documents, before (pending) and after (attached) the attachment was uploaded.</p>
Category and subcategory	<p>The category and subcategory of the required document. For example, Plans and Blueprints.</p>
<b>Required Application Step</b>	<p>The step at which the document with the specified category and subcategory is required. For example, Submittal or Issuance.</p>
<b>Upload and Upload More</b>	<p>Click the upload button on a required document card to select a file in File Upload dialog box. Click <b>Open</b>.</p> <p>The document's category and subcategory are prepopulated on the <b>New attachment</b> drawer when you upload the file through the required document card.</p> <p>Enter a description and click <b>Upload</b>.</p> <p>The attachment appears in the attachments table with Yes in the <b>Required</b> column.</p>

Agency staff with permissions can also remove a document requirement using the trashcan delete icon on the required document card.

A required document count keeps track of the required and provided documents.

Agency staff with permissions can override document requirements and view override history.

#### Related Topics

- [Completing an Application](#)
- [Working with Application Attachments](#)

## 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 business license, a permit, or a planning application.

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

The condition indicator in the header of the details pages displays the most severe condition. Click the **All Conditions** link next to the icon to see a list of all applicable conditions, including the condition name, severity, source, source

reference, display message, and when the condition was applied. Click a condition row to open the application's Conditions detail page in a new window.

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

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

## Security Details for Applying Conditions to Applications

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

### Permit 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 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 Applications

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

### Business License Applications

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Business License Conditions Management	Apply and resolve conditions on business license applications and licenses.	PSC Business Analyst PSC Business License Inspection Supervisor PSC Business License Inspector PSC Business License Manager PSC Business License Specialist PSC Cashier PSC Code Enforcement Application Administrator PSC Permits Application Administrator PSC Planning and Zoning Application Administrator PSC Zoning Administrator

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

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

## Viewing Conditions

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

Access the Conditions page in the application details. One way to do that is to select the **Business License Transactions, Permits, or Planning Applications** tile on the Agency Springboard. On the respective applications list page, click the row for the application you are working with.

1. In the left navigation panel of the application details, expand the **Application** section and click the **Conditions** menu item.
2. On the Conditions page, you can use the condition filters to display the applied conditions like this:
  - o **Active** - Displays only active conditions in the list.
  - o **Resolved** - Displays only conditions that are already resolved in the list. You can't update resolved conditions.
  - o **All** - Displays all conditions in the list.

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

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

Page Element	Description
<b>Condition Name</b>	The name of the condition selected by the agency staff at the time of applying the condition.
<b>Severity</b>	The level of severity defined for the selected condition.
<b>Display Message</b>	The message entered at the time of applying the condition.
<b>Status</b>	The status of the condition such as Applied or Resolved.
<b>Applied Date</b>	The date when the condition was applied.
<b>Source</b>	The source of the applied condition. For example, the condition was applied on the parcel, address, person, contractor license, or business license.
<b>Source Reference</b>	<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 <b>Source</b> column displays Address, and the <b>Source Reference</b> 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 <b>Apply Condition to Transactions</b> option, then the condition is automatically applied to all transactions belonging to the source application. If the condition was applied</p>

Page Element	Description
	to a business license with the <b>Apply Condition to Transactions</b> option turned on, then the condition is automatically applied to all business license applications related to the license. For details, see <a href="#">Setting Up Conditions</a> .
<b>Priority</b>	The priority selected - High, Medium, or Low.
<b>Resolved Date</b>	The date when the condition was resolved.
<b>Resolve</b>	The button used for resolving a condition. The <b>Resolved</b> button for resolved conditions 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.

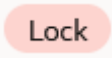

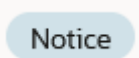
## Applying a Condition to a Transaction

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
<b>Condition Name</b>	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.
<b>Display Message</b>	Displays the message associated with the selected condition. This message is entered by your agency administrator in the condition definition and can't be updated here.
<b>Severity</b>      	Displays a badge with the level of severity defined for the selected condition. <ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>
<b>Condition Rules</b>	Select one or more from the available condition rules: <ul style="list-style-type: none"> <li>○ <b>Prevent Workflow Advancement</b></li> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b></li> <li>○ <b>Prevent Inspection Result</b></li> <li>○ <b>Prevent Final Inspection</b></li> </ul> 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.
<b>Priority</b>	Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .
<b>Description</b>	Displays the description as entered by your agency administrator in the condition definition, but you can update the text here.
<b>Additional Information</b>	Displays additional information as entered by your agency administrator in the condition definition, but you can enter new information here.

3. 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.

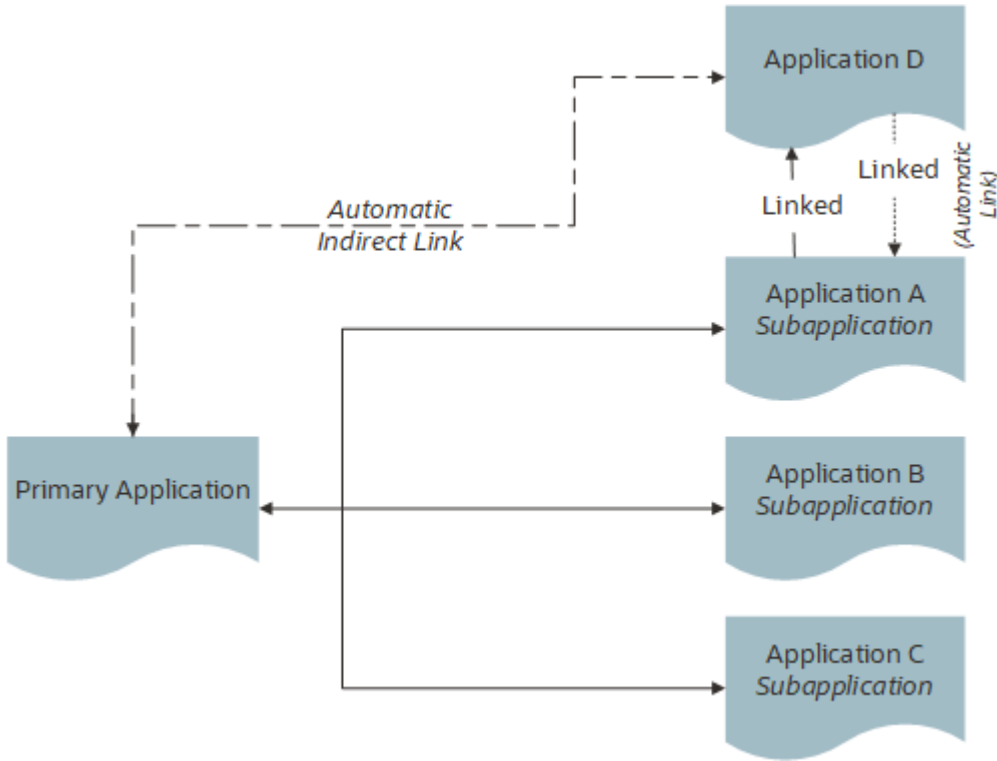
Agency staff can establish links between transactions and code enforcement cases as well. Only agency staff such as a code technician have access to the Case – Related Transactions page and are allowed to drill down to the case detail from other transactions. Public users don't have access to related 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
<b>Search</b>	Use the search control to filter the list of related transactions with a "begins with" keyword search. For example, if you want to confirm a planning application has been linked, enter <i>planning</i> .
Filter buttons	Select the filter option to list the applications linked by the types: <ul style="list-style-type: none"> <li>• <b>All</b> - All related transactions in the list.</li> <li>• <b>Primary</b> - For permits, planning applications, and business license applications.</li> <li>• <b>Subapplication</b> - For permits, planning applications, and business license applications.</li> <li>• <b>Linked</b> - For permits, planning applications, business license applications, and cases.</li> </ul> This option displays the count of applications for each type in parentheses.
<b>Link Applications</b> and <b>Link Cases</b>	Click the <b>Link Applications</b> button to link a business license, permit, or planning application to the current application. Click the <b>Link Cases</b> button to establish links between transactions and code enforcement cases.
<b>Include Indirects</b> or <b>Exclude Indirects</b>	Only available when the application has an indirect relationship with another application.  Click <b>Include Indirects</b> to display the indirectly linked applications for each application record. Indirectly linked applications aren't included in the list by default.  Click <b>Exclude Indirects</b> to hide the indirectly linked applications for each application record.
<b>View &gt; View Relations</b>	Click to view a diagram representing the relationship between the transactions. Indirectly linked applications must be marked as linked to appear in the diagram.  <b>Note:</b> Indirectly linked applications must be displayed in the list to appear in the diagram. Click the <b>Include Indirects</b> button before you view the link relationship diagram.
<b>Transaction ID</b>	View the identifier of the linked transaction and a link to access the application detail.

Page Element	Description
	<p><b>Note:</b> The detail link is available only for agency staff. Public users accessing this page for their transaction can only view the identifier of the application or case. They can't drill down to the detail page.</p>
<b>Transaction Type</b>	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> .
<b>Classification</b>	Shows the classification of the transaction, such as Permit, Case, Planning application, and so on.
<b>Link Type</b>	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.
<b>Transaction Status</b>	The current status of the transaction or case, such as <i>Pending</i> , <i>Submitted</i> , <i>Inspection</i> , <i>Violation</i> , and so on.
<b>Description</b>	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> .
<b>Transaction Updated Date</b>	The date on which the transaction was last updated.
<b>Linked By and Linked On</b>	The name of the person who linked the transaction, and the date on which it was linked.
<b>Conditions of Approval</b>	When a transaction has conditions of approval applied to it, this column displays a <b>View</b> link. Click the link to view details.
 <b>Actions</b>	<p>Depending on the type of related transaction, you can select from these options:</p> <ul style="list-style-type: none"> <li>• Mark a transaction as a subapplication or linked.</li> <li>• Remove the link between applications.</li> <li>• Apply conditions of approval to permits.</li> </ul> <p>For more information, see "Performing Actions on Related Transactions" in this topic.</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.

Click the **Link Cases** button to open the **Link cases** drawer, which lists the cases you can link. Agency staff can access the list of cases from this drawer. These pages list all the active 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:
  - o **Add as Linked**
  - o **Add as Primary** - For permits and cases only.
  - o **Add as Subapplication** - For permits and cases 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 Primary**
- **Mark as Subapplication**
- **Mark as Linked**
- **Remove Application Link** - Not available for an automatically linked transactions.
- **Apply Conditions of Approval** - Add conditions of approval to the current permit.

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

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

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

## Working with Permit Conditions of Approval

Conditions of approval are restrictive requirements and terms that are applied to project applications such as permits and planning applications. Regulatory agencies enforce such conditions at various stages of the development life cycle to ensure project compliance with the regional laws.

Managing conditions of approval consists of applying conditions through transactions, reviewing, and resolving them based on the compliance criteria defined at specific stages of the project development time line.

### Security Details for Working with Permit Conditions of Approval

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Permits Conditions of Approval Management	Apply and resolve conditions of approval on permits that are not closed.	PSC Inspections Supervisor PSC Geographical Information System Administrator PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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


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 Conditions of Approval

The Conditions of Approval section on the permit overview page shows a graphical representation of the status of the conditions of approval that were applied at various stages of the project time line. The various stages of the project are determined by the compliance period set up by the agency. You can click each dial to drill down to the details of the conditions applied for the specific compliance period.

1. Navigate to **Permits > Permits** or click the **Permits** tile on the Agency Springboard.
2. On the Permit Applications list page, click the row for a selected permit to open the Overview page.
3. On the Overview page, review details of conditions of approval in the **Conditions of Approval** section:

Page Element	Description
	Review the status of the conditions: <ul style="list-style-type: none"> <li>○ The number in the center of the dial shows the number of applied conditions.</li> <li>○ The colored section represents the resolved conditions. The complete dial changes to green color when all applied conditions are resolved,</li> <li>○ &lt;Number&gt; Resolved: The number of resolved conditions.</li> </ul> Click the dial to open the Conditions of Approval page, which lists all the conditions applied to the permit for the specific compliance period.
<b>Others &lt;number&gt;</b>	Review the number of additional conditions applied.

Page Element	Description
<b>View Related Transactions</b>	Click to open the Related Transactions page and then link transactions through which you apply conditions of approval to your permit. See the next section, Applying Conditions of Approval, for more details.

## Applying Conditions of Approval

As an agency staff such as a permit technician, you apply the conditions of approval to your permit through related transactions linking. After linking the planning applications that contain the conditions you require, you access the list of conditions and select the ones that must apply to your permit. Each of the selected conditions applied to the planning application will map itself to your permit and spread across the stages of permit development life cycle – based on the compliance period specified by the agency planner.

To apply conditions of approval:

1. Navigate to **Permits > Permits** or click the **Permits** tile on the Agency Springboard.
2. On the Permit Applications list page, click the row for a selected permit to open the Overview page.
3. In the Conditions of Approval section, click the **View Related Transactions** button to open the Related Transactions page for the permit.
4. On the Related Transactions page, click the link button to link either applications or cases to the permit.
5. The Link applications and Link cases drawers list only those applications and cases that are active for the selected property. Use the checkboxes to select the applications or cases that have the conditions of approval needed for your permit.
6. Click the add button. You can choose to simply link an application or add it as a primary or a subapplication.

The drawer closes and the Related Transactions page now lists the newly linked transactions.

Transactions of the type *Manual* as well as *Automatic* are listed. For information about transactions sourced manually and automatically, see [Working with Related Transactions](#).

7. Click the **Actions** menu for the application record from which you want to apply conditions and select **Apply Conditions of Approval**.
8. On the Conditions of Approval drawer, review the following details:
  - o The planning application to which the conditions are applied.
  - o The planner assigned to the application.
  - o The list of active conditions of approval. Expand each item to view its description, compliance period, and a switch to select for applying to the permit.

Use the switch to individually select the conditions you want to apply to your permit. Select the **Apply All** switch to apply all the conditions listed. Click **Save** to close the page and apply the selected conditions.

9. The Related Transactions page shows the updated record with a link to view the conditions applied. Click the **View** link to reopen the Conditions of Approval page.

The **Conditions of Approval** section in the Overview page now shows the distribution of the applied conditions over the project development time line. Permit technicians can review and resolve them as needed.

## Working with Fees and Payments

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

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

Access the Fees and Payments page in the application details. One way to do that is to select the **Business License Transactions, Permits, or Planning Applications** tile on the Agency Springboard. On the respective applications list page, click the row for the application you are working with.

1. In the left navigation panel of the application details, expand the **Fees and Payments** section and click the **Fees and Payments** menu item.
2. Use the search or filters for finding or viewing fees and payments.
3. On the Fees and Payments page, view a list of fees, including the following information:

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

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Void</i>: Indicates the refund for the fee was voided.</li> <li>○ <i>Waived</i>: Indicates the applicant no longer has to pay the fee because it's been waived.</li> <li>○ <i>Payment in Process</i>: Indicates that the fee payment was initiated but not yet resolved. Typically this status is temporary and resolved to <i>Paid</i> once the payment is recorded in the application. When the status changes to <i>Paid</i>, click the <i>Paid</i> link to download and view the payment receipt in the format set up by your agency.</li> </ul>
<b>Department</b>	The department within the agency requiring the payment.
<b>Assessed Date</b>	The date the request for payment was issued.
<b>Due Date</b>	The date on which the payment is due.
<b>Memo</b>	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.
<b>Payment Date</b> (and payer name)	<p>The date payment was received.</p> <p>This field also displays the payer name, which depends on the payment method:</p> <ul style="list-style-type: none"> <li>○ Cash: The name provided by the customer to the cashier.</li> <li>○ Check: The name recorded during payment processing, usually the name on the check.</li> <li>○ Credit or debit card: The name returned by the payment processor.</li> <li>○ Offline: The name recorded during payment processing.</li> <li>○ Trust account: No name is displayed.</li> </ul>
<b>Payment Method</b>	Indicates the method using which the payment was made, for example, <i>online</i> or <i>offline</i> .
<b>Payment Reference</b>	The payment reference issued for the transaction. Click the payment reference number to view the payment receipt.
<b>Paid By</b>	Indicates the name of the person who completed the fee payment. It can be an agency staff, applicant or contact with application access.
<b>Invoice</b>	The payment invoice number of the paid fee associated with the application. Click the invoice number link to view the payment invoice.
<b>Total Fees</b>	The total amount of fees that may be applicable to the application.
<b>Total Payable</b>	The amount of fees that are designated as payable.

Page Element	Description
	The agency may generate fees that are not due upon application submission and are therefore not payable. For example, plan review or inspection fees may be applied based on whether a plan review or inspection is required or not. Or the agency may place a due fee on hold.
<b>Total Paid</b>	The amount of the total fees already collected.
<b>Balance Due</b>	The remaining portion of the fees yet to be collected.
<b>Pay Fees</b>	<p>Click to open the Pay fees drawer, 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><b>Note:</b> The <b>Pay</b> button takes applicants and contacts with application access directly to the Checkout page in payment services.</p>
<b>View Deposit Accounts</b>	Click to open the Deposit Accounts page and view a list of all deposit accounts associated with the project.

## Viewing All Fees and Payments for a License

Using the **Fees and Payments Summary** tab on the Business License Details page, you can view all fees, payments, and credits that have been applied to a license over multiple license periods. You can also track balances and payments for the life of the license and not just a single transaction.



1. Select the **Business Licenses** tile on the Agency Springboard.
2. Click the row for the selected application on the Business License page to display the Business License Details page.
3. Select the **Fees and Payments Summary** tab.
4. Click the **Total Fees** link for a license period. This will display the Total fee details drawer listing all fees for that transaction.
5. Click the **Balance Due** link for a license period. This will display the Balance due details drawer listing any unpaid fees for that transaction.

## 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:
  - o *Pending*
  - o *Hold*
  - o *Due*
  - o *Canceled*
  - o *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. When recalculating fees for legacy permits, planning, or license applications, migrated fees from a legacy application may not be considered during recalculation, and duplicate fees could result. Manual fees can be added to adjust for any discrepancies.

## 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 fee items online.

Access the Fees and Payments page in the application details. One way to do that is to select the Business License Transactions, Permits, or Planning Applications tile on the Agency Springboard. On the respective applications list page, click the row for the application you are working with.

Here's how to refund fees:

1. In the left navigation panel of the application details, expand the Fees and Payments section and click the Fees and Payments menu item.
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 choose 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 button on the Fees and Payments page. The Deposit Accounts drawer 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
<b>Organization Name</b>	Displays the name.
<b>Account Information</b>	Displays the account name, number, and established date.
<b>Site Information</b>	Displays the site name and address.
<b>Billing Contact</b>	Displays the billing contact information added during application intake.  Click <b>Add</b> 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 All 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
<b>Task</b>	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.
<b>Status</b>	The status of the task, such as In Progress, Completed, and so on.
<b>Assigned To</b>	To whom a task is assigned.
<b>Due Date</b>	If applicable, the date when the task must be completed.
<b>Assigned By</b>	Who assigned the task.
<b>Assigned Date</b>	The date the task was assigned.
<b>Duration</b>	The amount of time taken to complete the task.
<b>Completed By</b>	Who completed the task.
<b>Action</b>	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.

Here's how to alter the workflow:

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

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

Here's how to alter a workflow step manually:

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 is displayed in the classic user interface.

A workflow process definition may contain one or more parallel tasks. Here are considerations for parallel tasks:

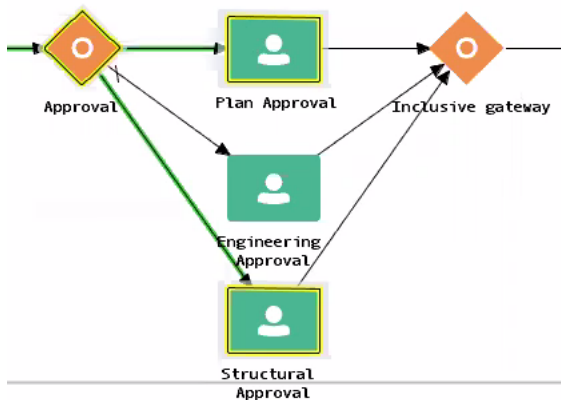
- They don't depend on each other to be completed.
- They can be completed simultaneously.

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.



## Viewing Application Status History

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

## 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

Commercial Sign • SIGN-2024-00015 Inspection  
1 APPLGATE WY, ALAMEDA, CA 94502

Subapplication

Actions Pay Fees

### Time Recording

Search

1 item

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

Recorded Time Unassessed Assessed

Application

- Application Details
- Property Information
- Linked Permits
- Attachments
- Conditions
- Related Transactions
- Fees and Payments
  - Fees and Payments Due 0.00 USD
- Progress
  - Workflow

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
<b>Search</b>	Enter identifying text in the lookup field. Remove the search text or click the <b>Clear All Filters</b> button if no matching time records were found.
<b>Recorded Time</b>	Click to display all associated time records.
<b>Unassessed</b>	Click to view time records with unassessed fees.
<b>Assessed</b>	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
<b>Name</b>	Displays the name of the agency staff who entered the time. Click the name link to open the <b>Time details</b> drawer.
<b>Source</b>	View the source of the time entry. For example, the inspection number.
<b>Category and Subcategory</b>	View the category and subcategory of the time entry, based on the selected time type code.
<b>Date</b>	View the date associated with the activity for which time was recorded.
<b>Hours and Minutes</b>	View the hours and minutes associated with the activity.
<b>Billable</b>	Indicates whether the time was marked as billable back to the applicant.
<b>Total Fees</b>	Displays the unassessed fees, if any, for time entries listed when using the <b>Unassessed</b> 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
<b>Name</b>	Select a different name from the available options.
<b>Date</b>	Enter a different date.
<b>Time Type Code</b>	Select a different time type code from the available options. The category and subcategory appear depending on the selected code.
<b>Hours and Minutes</b>	Update the hours and minutes associated with the activity.
<b>Comments</b>	Update the comments for this time entry.
<b>Override Bill Rate</b>	Enter a rate that overrides the bill rate listed for the selected agency staff.
<b>Billable</b>	Turn on or off the switch to indicate that the time recorded is billable to the applicant.
<b>Assess Now</b>	Turn on or off the switch to indicate whether the system should consider the billable amount in fee assessment calculations.
<b>Total Fees</b>	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 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 of 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

### Business Licenses

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

**Note:** Before contacts can manage other contacts, your agency must add the PSC Contact User duty role (ORA\_PSC\_CONTACT\_USER\_DUTY) to the PSC Custom Registered Public User role (CUSTOM\_PSC\_REGISTERED\_PUBLIC\_USER) and enable application access for the contact type.

For more information on creating roles for Oracle Permitting and Licensing, see *Creating Custom Roles for Oracle Permitting and Licensing*.

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

## Managing Application Contacts

Access the Contacts page in the application details. One way to do that is to select the **Business License Transactions, Permits**, or **Planning Applications** tile on the Agency Springboard. On the respective applications list page, click the row for the application you are working with.

1. In the left navigation panel of the application details, expand the **People** section and click the **Contacts** menu item.
2. Use the search or filters for finding or viewing contacts.

Page Element	Description
<b>Search</b>	Enter text to filter or find contacts in the search bar.
<b>Active</b>	Click this button to view only active contacts in the grid.
<b>All</b>	Click this button to view all contacts for the application, including inactive contacts.

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

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

Page Element	Description
<b>Name</b>	The name of the contact.
<b>Title</b>	The business title of the contact.
<b>Business</b>	The business name of the contact.
<b>Email and Phone</b>	The email address and phone number of the contact.
<b>Contact Type</b>	The contact type, which is the role or position of the contact person relative to the current application. For example, a contact might be Applicant, Architect, Business Manager, Business Owner for license applications, and so on. For more information, see <i>Setting Up Contact Types</i> .

Page Element	Description
<b>Primary Contact</b>	<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><b>Note:</b> The primary contact has the same application access as the applicant regardless of the access defined for their contact type.</p>
<b>Role</b>	The contact's identifying role. For example, <i>Applicant</i> and <i>Previous Applicant</i> .
<b>Access</b>	<p>Indicates the type of access the contact has to the application:</p> <ul style="list-style-type: none"> <li>○ Full</li> <li>○ None</li> <li>○ View, pay, print</li> </ul> <p>This contact type is applicable only to business licenses. Contacts of this type can view the license, pay fees, and print the license certificate. The access level is based on the contact type and can only be updated to allow more access.</p>
<b>Active</b>	<p>Indicates whether this is an active contact or not.</p> <p>Applicants and contacts with full access can make a contact inactive. Inactive contacts can't access the application. This change can be made after application submittal in the application details.</p>

- 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 <b>Contact details</b> 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.

Page Element	Description
<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 <i>Changing the Applicant on an Application</i> .

## 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:

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

Page Element	Description
<b>Contact Type</b>	<p>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:</p> <ul style="list-style-type: none"> <li>○ Full</li> <li>○ None</li> <li>○ View, Pay, and Print</li> </ul> <p>The <b>View, Pay, and Print</b> option is available only for business license applications. Contacts can only view the application, pay the fees, and print the license certificate.</p> <p>The access level is based on the contact type and can only be updated using the <b>Access</b> buttons to allow more access.</p>
<b>Active</b>	Turn on the switch for active contacts and to update their contact information.
<b>Access</b>	Click the <b>Full</b> 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 <b>None</b> .
<b>Primary Contact</b>	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 **View, pay, and print** button for partial access or **Full** to update the contact's access to allow full access. You can allow more access to the contact when the default access associated with the contact type is **None** or **View, pay, and print**.
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](#) for business licenses or [Working with Contractors and Agents in Applications](#) for permits and planning 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.
  - o 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.
  - o 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 the **Update** button to save your changes.

## 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. However, if a historical permit or planning application was imported or migrated, the contractor license details reflect the version of information saved with the application and may not be current.

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:

For information about adding a contractor during the application intake process, see *Completing an Application*: Here's how to add contractors to a permit or planning application after the application has been submitted:

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 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 working with permit or planning applications.
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 or planning application, 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:

- o **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 life-cycle, 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.

- o **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
<b>In Use</b>	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.
<b>Contact Persons</b>	<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 <b>Select Contacts</b> 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 <b>Contact Type</b> that you select. But access can be upgraded in the application details. For more information, see <a href="#">Working with Application Contacts</a>.</p> <p>Click the <b>Delete</b> 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 Communications

Messages enable agency staff, responsible parties, and applicants to maintain correspondence regarding the progress of business license, 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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC 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 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

Access the Communication page in the application details. One way to do that is to select the **Business License Transactions, Permits, or Planning Applications** tile on the Agency Springboard. On the respective applications list page, click the row for the application you are working with.


1. In the left navigation panel of the application details, expand the **Communication** section and click the **Communication** menu item.
2. Use the search or filters for finding or viewing communications.
3. On the Communication page, click the **Add** button.
4. 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
<b>Channel Type</b>	<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"> <li>○ <i>Email</i>: Generates an email that is sent to users.</li> <li>○ <i>Emails and Notifications</i>: Generates both an email and a notification with the same message.</li> <li>○ <i>Notification</i>: Generates a notification that appears when users click the notification icon in the application.</li> <li>○ <i>Text</i>: Generates a short message service (SMS) text message that is sent to users.</li> </ul>
<b>Visibility</b>	<p>Select which users can see this message listed on the application's Communication Details page. All communications can be viewed by agency staff.</p> <p>This option is presently not applicable for Code Enforcement.</p> <p>Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Applicant and contacts</i>: Includes agency staff, the applicant, and contacts added to the transaction.</li> <li>○ <i>Agency staff only</i>: Includes only agency staff.</li> <li>○ <i>Applicant and Primary Contact</i>: Includes agency staff and the primary contact on the transaction.</li> </ul>
<b>Display Format</b>	<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"> <li>○ <i>HTML</i>: Displays rich text, links, and images</li> <li>○ <i>Text</i>: Displays plain, unformatted text.</li> </ul>


Page Elements	Definition
<p><b>Create Web Form</b></p>	<p>Click to open the Web Form drawer where you create a questionnaire that you can insert into your message. Click the <b>Insert Web Form</b> once you're done creating the questionnaire.</p> <p>For details, see the Communicating Using a Web Form section later in this topic.</p>
<p><b>AI Assist</b></p>	<p>The AI Assist feature is available for:</p> <ul style="list-style-type: none"> <li>○ Permits</li> <li>○ Planning and Zoning</li> <li>○ Business Licenses</li> <li>○ Cases</li> <li>○ Incidents</li> <li>○ Business Entity Locations</li> </ul> <p>Click and enter a prompt to generate an automated email or notification. The agency must enable the Redwood Experience user interface in order to use the AI Assist feature.</p> <p>Staff should always review messages generated by AI Assist before sending.</p> <p>For more information, see Using AI Assist, later in this topic.</p>

### Email Attributes

Page Elements	Definition
<p><b>To</b></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 <b>Insert into the To field</b> drawer where you can search for and select recipients or transaction attributes. Click the <b>Insert</b> 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 <a href="#">Using Attributes in Communication Templates</a>.</p>

Page Elements	Definition
<p><b>Cc and Bcc</b></p> 	<p>Enter or click + and select the email addresses of the people or organizations that you want to receive a copy or blind copy of the message.</p> <p>These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>

### Notification Attributes



Page Elements	Definition
<p><b>To</b></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 <b>Insert into the To field</b> drawer where you can search for and select recipients or transaction attributes. Click the <b>Insert</b> 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 <a href="#">Using Attributes in Communication Templates</a>.</p>

### Attachments

Page Elements	Definition
<b>Add</b>	<p>Click to add an attachment from your local device.</p> <ul style="list-style-type: none"> <li>○ The maximum number of attachments in a single email is 5.</li> <li>○ The maximum total size of an email, including all attachments, can't be more than 10 MB.</li> <li>○ 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.</li> </ul>
<b>Attachment information</b>	View this information for each attachment in the table:

Page Elements	Definition
	<ul style="list-style-type: none"> <li>○ File Name</li> <li>○ File Size</li> <li>○ Description</li> <li>○ Uploaded By and Uploaded On</li> </ul>
<b>Actions</b>	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
<p><b>From</b> </p>	<p>Click the insert icon (+) button to view the <b>Insert into the From field</b> 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 <b>Insert</b> button on the drawer to add your selections.</p> <p>The Agency sender address used here is configured in the Agency setup. For more information, see <a href="#">Setting Up Agency-Level Email</a>.</p>
<p><b>Subject</b> </p>	<p>Enter a brief description of the purpose and content of the message or click the insert icon (+) button to view the <b>Insert into the Subject field</b> drawer where you can search for and select attributes to include in the subject line. Click the <b>Insert</b> button on the drawer to add your selections.</p> <p>This field doesn't appear for the <i>Text</i> channel type.</p>
<b>Message Body</b>	<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> <p><b>Note:</b> When you enter a website address as a text or an image link, the system verifies if it is present in the safe domains list. If not, add it as a safe domain. Only links of safe domains can be included in the rich text editor. See <a href="#">Setting Up Safe Domains</a>.</p>
<b>Insert in Message Body</b>	Click this button to view the <b>Insert into the Message Body field</b> drawer where you can search for and select attributes to include in the message body. Click the <b>Insert</b> button on the drawer to add your selections.

Page Elements	Definition

5. Click **Send**.

## Using AI Assist

AI Assist enables you to automate ad hoc emails and notifications improving efficiency and creating messages that are professional and informative. You can enter some event-specific prompt information in the message body, click the AI Assist button, and get AI generated text. The agency must enable the Redwood interface in order to use the AI Assist feature.

Here's an example of a prompt: "Write an email to the applicant that their permit is being processed. Include the permit type, permit number, and application number. Let the applicant know who the permit has been assigned to, and that this person will follow up if additional information is required."

Here's an example of the AI generated text:

Dear Ms. Jose,

We are writing to acknowledge receipt of your application for a CKPERMITTYPE01 permit, application number CK-2024-00237, submitted on Thursday, November 07, 2024. Your permit application is currently being processed.

The City of Innovation would like to inform you that your application is being reviewed by our team and is assigned to Joe Green. Mr. Green will be in touch if any additional information is required. Please allow us up to 7 business days to complete the review process.

Should you have any further questions about your application, you may contact Joe Green directly at [joegreen@cityofinnovation.gov](mailto:joegreen@cityofinnovation.gov).

Thank you for your patience.

Sincerely,

Joe Green

City of Innovation

8888 Santa Clara St, San Jose, US-CA, US, 78787

### Using Attributes in AI Assist

These are the key attributes you can use in a prompt. You can add other text in the prompt to create the message:

- Agency Name
- Agency Staff Name (who is currently creating the Ad Hoc communication)
- Agency Address
- Application ID
- Applicant Name
- Application Link
- Record Type
- Application Description
- Permit Issue Date

- Job Cost
- Currency Code
- Fees Balance Due


## 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. Select a **Reply-To** address.
5. 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 <a href="#">Setting Up Agency-Level Options for Business Licenses</a>.</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.

6. From the Action column, click the check mark to add the question. Use the x mark to clear the Question Text and Answer Type fields. You can also use the  button to remove a question row.
7. 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.
8. 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 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, use the search or filters for finding or viewing communications.  
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.
  - o 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.
  - o 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 business license activity, 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.

### 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

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

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

### Planning 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

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

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

### Code Enforcement

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Update Incident Comments Added by Others and Self	Update Incident Comments Added by Others and Self	PSC Code Enforcement Application Administrator PSC Code Enforcement Supervisor
PSC Add Incident Comments	Allows users to add incident comments.	PSC Code Enforcement Incident Administration PSC Code Enforcement Supervisor PSC Code Enforcement Technician PSC Code Enforcement Officer
PSC Delete Code Enforcement Inspection Comments Added by Others and Self	Allows users to delete code enforcement inspection comments added by others and self.	PSC System Administrator Application Implementation Consultant
PSC Delete Code Enforcement Inspection Comments Added by Self	Allows users to delete code enforcement inspection comments added by self.	PSC Code Enforcement Case Administration PSC Code Enforcement Supervisor PSC Code Enforcement Technician

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Code Enforcement Officer PSC Code Enforcement Application Administrator
PSC Add Code Enforcement Inspection Comments	Allows users to add code enforcement inspection comments.	PSC Code Enforcement Case Administration PSC Code Enforcement Supervisor PSC Code Enforcement Technician PSC Code Enforcement Officer PSC Code Enforcement Application Administrator
PSC Update Code Enforcement Inspection Comments Added by Others and Self	Allows users to update code enforcement inspection comments added by others and self.	PSC System Administrator Application Implementation Consultant
PSC Update Case Comments Added by Self	Allows users to update case comments added by self.	PSC Code Enforcement Case Administration PSC Code Enforcement Supervisor PSC Code Enforcement Technician PSC Code Enforcement Officer PSC Code Enforcement Application Administrator
PSC Update Incident Comments Added by Others and Self	Allows users to update incident comments added by others and self.	PSC System Administrator Application Implementation Consultant
PSC Update Incident Comments Added by Self	Allows users to update incident comments added by self.	PSC Code Enforcement Incident Administration PSC Code Enforcement Supervisor PSC Code Enforcement Officer PSC Code Enforcement Technician

### Business Licenses

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Add Business License Comments	Allows users to add business license comments.	PSC System Administrator PSC Apply Business License PSC Business License Inspector

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Business License Management
PSC View Business License Comments	Enables users to view business license comments.	PSC System Administrator PSC Business License Inspector PSC Business License Management
PSC Delete Business License Comments added by self	Enables users to delete business license comments added by themselves.	PSC System Administrator PSC Business License Inspector PSC Business License Management
PSC Delete Business License Comments added by self and others	Enables users to delete business license comments added by themselves and others.	PSC Business License Application Administrator
PSC Add Business License Inspection Comments	Allows users to add business license inspection comments.	PSC Request Business License Inspections PSC Business License Management with Elevated Access
PSC Update Business License Comments added by self	Enables users to update business license comments added by themselves.	PSC System Administrator PSC Business License Inspector PSC Business License Management
PSC Update Business License Comments added by self and others	Enables users to update business license comments added by themselves and others.	PSC Business License Application Administrator
PSC Update Business License Workflow Comments of tasks assigned to self	Enables user to update business license workflow comments of tasks assigned to themselves.	PSC System Administrator PSC Business License Specialist PSC Business License Inspector PSC Business License Manager
PSC Update Business License Workflow Comments of tasks assigned to self and others	Enables user to update business license workflow comments of tasks assigned to themselves and others.	PSC Business License Application Administrator

## Adding Comments

You can add your own comments and work with comments in these categories:

- *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 predefined 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. Only agency staff can see private comments.

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.

**Note:** When you enter a website address as a text or an image link, the system verifies if it is present in the safe domains list. If not, add it as a safe domain. Only links of safe domains can be included in the rich text editor. See [Setting Up Safe Domains](#).

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

## Viewing Favorite, Standard, and Recent Comments

1. You can enter a comment that is already available in the system.

On the **Add comment** drawer in the **Select Comments** section, 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.

By default, only the Category filter is displayed when you open the standard comments picker. After the you select one or more categories, the comments list is filtered and the Subcategory filter becomes available, allowing to further narrow the results. If the selected category changes, the selected subcategories are also cleared so only valid filter combinations are used.

- *Favorite*: Comments that you have marked as favorite.
2. Select a comment and click the **Insert** button to post the comment.

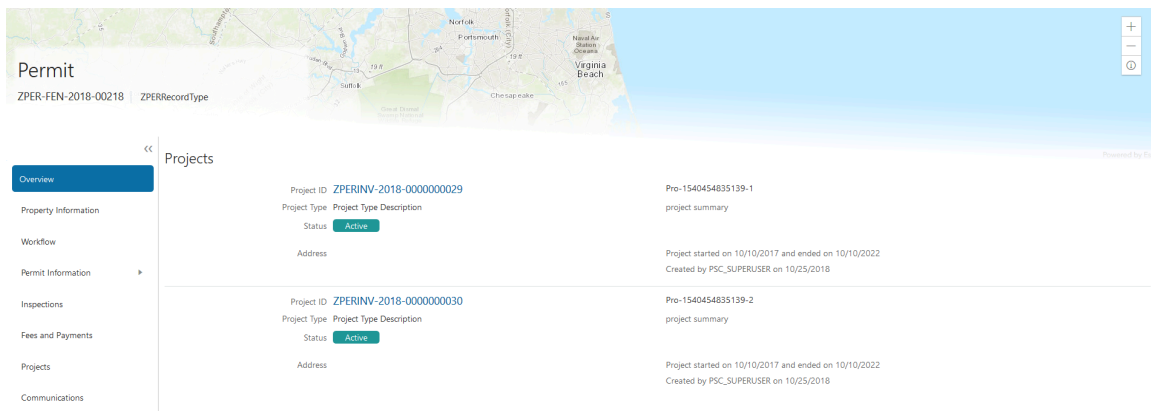
**Note:** If you want to mark a standard comment as your favorite, from the **Actions** menu, click  **Add to Favorites**. The *Favorite* tab will add the comment to its list. Your agency administrator decides the duration for which a comment can be called *Recent*. The duration can be set up on the *Managing Comments* page.

## 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
<b>Project ID</b>	Click the project ID link to access the projects page that was created by agency staff. The project ID is automatically generated after saving the project.

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

# 8 Working with Expiration

## Security Details for Working with Expiration

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Administer Permit Expiration Date	Administer the expiration date on the permit overview page.	PSC Permits Supervisor PSC Permit Technician
PSC Update Permit Expiration Date	Update the expiration date on the permit overview page.	PSC Building Officer PSC Business Analyst PSC System Administrator PSC Principal Planner PSC Planning Coordinator PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Renew Permits	Allows users to renew expiring permits.	PSC System Administrator PSC Permits application administrator PSC Permit technician PSC Permits supervisor PSC Plan reviewer PSC Planning coordinator
PSC Contact User	Allows users to manage permits to which they have been assigned as a contact.  Allows users to request renewal for their permits that are about to expire, or are expired.	Applicant and Contacts with full access.

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
<b>Frequency</b>	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> </ul> <p><b>Note:</b> <i>Daily</i> is the recommended option for running the expiration status update process.</p> <ul style="list-style-type: none"> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hours</i> or <i>Minutes</i>.</p>
<b>Days</b>	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.

Page Element	Description
	<p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<p><b>Weeks</b></p>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>
<p><b>Repeat – By day</b></p>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p><b>Repeat – By date</b></p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p><b>Month</b></p>	<p>Select the months in which you want your process to run.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

## Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- 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.

# 9 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 applications for billing and reporting purposes.

**Tip:** You can access time entry on a mobile device as well as on a laptop or desktop computer. The layout and some functionality changes based on the device you are using.

This topic discusses the time recording pages that agency staff use to record time.



## Accessing Time Entry

You add time entries directly on the respective pages for the transaction you are working on. For example, you can enter the time spent working on a permit inspection using the Time Recording page of the inspection details. Similarly, the time spent on case-related activities are entered on the Time Recording page of the case details page. You can access all these time records from the Time Recording page.

This is an example of a Time Recording list page.

# Time Recording

Active

Transaction 	Transaction Description 	Source	Source Description	Pr
MECH-2026-00012	Residential Mechanical	BLDG-INSP-2026	Inspection	10
PREAPP-2026-0006	PreApplication	Pre-Application		
MECH-2026-00012	Residential Mechanical	Plan Review	Cycle 1	10

This is an example of a Time Recording page for a permit.

### Time Recording

Search Active

Transaction	Transaction Description	Source	Source Description	Property	City	State	Postal Code	Transaction Status	Last Date Time Recorded	Total Hours	Total Minutes
MECH-2026-00012	Residential Mechanical	BLDG-INSP-2026	Inspection	104 PACIF...	ALA...	CA	94501	In process	4/17/26	2	0
PREAPP-2026-0006	PreApplication	Pre-Application						Payment pending	4/17/26	2	30
MECH-2026-00012	Residential Mechanical	Plan Review	Cycle 1	104 PACIF...	ALA...	CA	94501	In process	4/17/26	5	15

This is an example of a Time Recording page for a planning application.

Go to Time Recording ... [Pay Fees](#)

**Landmark Alteration - LM-2026-0001** Submitted

3258 Briggs Avenue, ALAMEDA, California 94501

4 conditions - Lock

---

- Overview
- Application**
- Application Details
- Property Information
- Attachments
- Conditions 4
- Related Transactions
- Fees and Payments**
- Fees and Payments Due 2,550.00 USD
- Progress**
- Workflow
- Reports
- Plan Reviews
- Conditions of Approval
- Status History
- Time Recording
- People**
- Contacts

### Time Recording

[+ Add](#)Recorded TimeUnassessedAssessed[↓](#)

Name	Source	Category	Subcategory
<a href="#">Sam Cook</a>	Planning Application LM-2026-0001	Time allocated to various meeting activities	Advisory meeting to provide guidance during the Pre-Application process
<a href="#">Sam Cook</a>	Planning Application LM-2026-0001	Time allocated to various meeting activities	Advisory meeting to provide guidance during the Pre-Application process
<a href="#">Allison Petrus</a>	Planning Application LM-2026-0001		

This is an example of a Time Recording page for a case.

[Go to Time Recording](#)

# C-260211-00657 Graffiti on Private Property

Citation 1

1521 Clement Ave Alameda California 94501

Case Reported Date 2/11/26    Comply By 2/17/26    Days Overdue 24

Overview

Progress

Timeline

Workflow

Inspections

**Time Recording**

Case

Case Details

Property Information

Related Transactions

Code Violations

Citations

Attachments

Appeals and Hearings

Responsible Parties

## Time Recording

Search

+ Add

Name ⌵    Source ⌵

Sam Cook    Case C-260211-

Sam Cook    Case C-260211-

This is an example of a Time Recording page for a case inspection.

Go to Time R...

### Initial Inspection

CNS-260122-00002

**Overdue**

\*\*\* Result

Location  
Mile 20.7 State Rte 61 S, Alameda

Schedule Date  
1/21/26

Due Date  
12/8/25

Comply By  
12/1/25

Code Officer  
Sam Cook

Code Technician  
Lisa Hill

---

Case Details  
C-251121-00640

Inoperable Vehicle

**Citation**

Issue Description  
There is an inoperable on the main road

Custom Date Field

#### Code violations +

Open  
CRO003  
3.04.003 - Inoperable Vehicle  
Comply By 12/1/25

[View all violations](#)

#### Comments +

[View all comments](#)

#### Attachments

**Drag and Drop**  
Select or drop files here.

Search

No items to display.

[View all attachments](#)

#### Time Recording +

Time allocated for Code Enforcement inspection activities - Time allocated to perform Code Enforcement Inspection  
Sam Cook  
1 Hour 30 Minutes  
1/21/26

Time allocated for Code Enforcement inspection activities - Time allocated to perform Code Enforcement Inspection  
Sam Cook  
1 Hour 30 Minutes  
1/21/26

[View all time recordings](#)

## 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.

Go to Permit Applications
Pay Fees

**Residential Mechanical • MECH-2026-00012** In process

104 PACIFIC AV, ALAMEDA, CA 94501

Primary 2 subapplications

**Application**

- Linked Permits
- Attachments
- Conditions
- Related Transactions

**Fees and Payments**

- Fees and Payments Due 0.00 USD

**Progress**

- Workflow
- Plan Reviews
- Inspections
- Status History
- Time Recording

**People**

- Contacts
- Contractor

**Communication**

### Time Recording

Recorded Time
Unassessed
Assessed
↓

Name	Source	Category	Subcategory	Date	Hours	Minutes	Billable
Sam Cook	Inspection BLDG-INSP-	Time allocated for inspection...	Time allocated to perform insp...	4/17/26	1	30	Yes
Sam Cook	Plan Review Cycle 1	Time allocated to various me...	Advisory meeting to provide gu...	4/17/26	3	0	Yes
Sam Cook	Inspection BLDG-INSP-	Time allocated for inspection...	Travel allocated during inspecti...	4/17/26	0	30	Yes
Sam Cook	Plan Review Cycle 1	Time allocated for plan revie...	Time allocated to review plans ...	4/17/26	2	15	Yes



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.



# 10 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 while the review cycle is open. After a review cycle is finalized, comments can no longer be added by plan reviewers.	PSC Plan Reviewer
PSC Add Comments to Plan Reviews Assigned to Others and Self	Add comments to all plan reviews. Plan coordinators can continue to add comments after a review cycle is finalized provided the permit or planning application isn't in a terminal status. They can't, however, update (other than updating the visibility to be public or private) or delete those comments.  <b>Note:</b> Plan coordinators can still add comments after a cycle is closed (but before terminal application status), whereas plan reviewers can't.	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 while the review cycle is open. After a review cycle is finalized, comments can no longer be updated by plan reviewers or plan coordinators. Imported Bluebeam comments can't be updated. Administrators can update comments at any time.	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 while the review cycle is open. After	PSC System Administrator

Primary Role	Access Description	Associated Job Roles and Abstract Roles
	a review cycle is finalized, comments can no longer be updated by plan coordinators. Imported Bluebeam comments can't be updated. Administrators can update comments at any time.	PSC Planning and Zoning Application Administrator
PSC Delete Plan Review Comments Added by Self	Delete plan review comments added by self while the review cycle is open. After a review cycle is finalized, comments can no longer be deleted by plan reviewers or plan coordinators. Imported Bluebeam comments can't be deleted. Administrators can delete comments at any time.	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 Delete Plan Review Comments Added by Others and Self	Delete plan review comments added by others and self while the review cycle is open. After a review cycle is finalized, comments can no longer be deleted by plan coordinators. Imported Bluebeam comments can't be deleted. Administrators can delete comments at any time.	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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		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

**Note:** When a plan review cycle is finalized, supported comments from Bluebeam are copied into Oracle Permitting and Licensing as separate Plan Review comments. Imported Bluebeam comments are read-only and can't be edited or deleted by plan reviewers or plan coordinators with the exception of updating the comment visibility between public and private. They can only change the visibility until the plan review cycle is closed.

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:
  - o **Copy marked up documents from most recent cycle** - Select to copy documents from the previous cycle if the cycle was electronic.
  - o **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:

- o Click the **View Cycle History** icon on complete review cycles.
- o 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 interface 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 in the classic user interface 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 information about conditions placed on permits or planning applications in the Redwood Experience user interface, see <a href="#">Working with Application Conditions</a> .
Lock	Appears in the transaction row to indicate that one or more conditions have been applied to the transaction. The icon for the most severe condition is displayed. Click the icon to view condition information. See also <a href="#">Setting Up Conditions</a> .

Page Element	Description
 Hold   Notice	
	Indicates an electronic plan review cycle with a Bluebeam Studio™ Session.
	Indicates that fees are due for the transaction. Click the <b>Fees Due</b> icon to view more details.
	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 <b>Actions</b> 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"> <li>• <b>Add Cycle Comments</b> - Add a cycle-level comment to the current plan review cycle for a permit or planning application that's in progress and view existing cycle comments. You can add, update, or delete cycle-level comments for plan reviews in any cycle status until the application is closed.</li> <li>• <b>View Plan Comments</b> - Review a list of consolidated plan comments for the permit or planning application.</li> <li>• <b>View Cycle History</b> - Review cycle and reviewer statuses and decisions across all cycles as well as reviewer due dates and the length of time a cycle was open.</li> </ul>

**Note:** For information about expanded and condensed grid formats and common grid controls in the classic interface, 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

The screenshot shows the 'Plan Reviews' interface. At the top, there are tabs for 'All Reviews', 'Open Reviews', 'Unassigned Reviews', 'Pending Reviews', and 'Reviewer Workload'. Below the tabs are several filter controls: a 'Date Range' dropdown set to 'All Date Types', a date range selector from '10/1/22' to '11/21/22', a 'My Job' toggle (checked), and 'Show All Application Statuses' and 'Show All Cycles' toggles (unchecked). A search bar is also present. The main area contains a table with the following columns: Department, Application, Application Type, Application Status, City, Description, Reviewer, Reviewer Due, Reviewer Decision, Decision Date, Cycle, Cycle Created, Cycle Status, and Actions. The table lists several entries for 'Residential Electrical' plan reviews in 'ALAMEDA' city, with reviewers like 'Charles Lake' and 'Betsy King'.

Department	Application	Application Type	Application Status	City	Description	Reviewer	Reviewer Due	Reviewer Decision	Decision Date	Cycle	Cycle Created	Cycle Status	Actions
Building	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Utilities	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Charles Lake	10/5/22			1	10/4/22	In Progress	
Electrical	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Betsy King	10/5/22			1	10/4/22	In Progress	
Fire Protection	ELEC-2022-00058	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Electrical	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Betsy King	10/5/22			1	10/4/22	In Progress	
Fire Protection	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Building	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical		10/5/22			1	10/4/22	In Progress	
Utilities	ELEC-2022-00059	Residential Electrical	Plan Review	ALAMEDA	Residential Electrical	Charles Lake	10/5/22			1	10/4/22	In Progress	

These switches are available to filter the plan reviews displayed on the page:

Page Element	Description
<b>My Job</b>	For plan coordinators or plan reviewers, view only plan reviews that match with the application types and departments assigned to you in your respective job role definitions.
<b>Show All Application Statuses</b>	View the plan reviews for applications that are in a final status—including <i>Completed</i> , <i>Certificate of Occupancy</i> , <i>Void</i> , <i>Withdrawn</i> , or <i>Denied</i> —in addition to the other statuses.
<b>Show All Cycles</b>	View all review cycles, including the closed review cycles for the permit and planning applications.

You can also use a variety of date filters to view the plan reviews. Your agency can choose the default values for the date type and time period fields in the agency-level setup options. See *Setting Up Agencies*.

Select a value in the date type drop-down list:

- *Cycle Due* - The date when the plan review cycle is scheduled to be completed.
- *Cycle Created* - The date when the plan review cycle was created.
- *Reviewer Due* - The date by which the plan reviewer must provide a decision.
- *Reviewer Decision* - The date when the plan reviewer provided a decision.
- *Cycle Decision* - The date when the cycle decision was provided.
- *All Dates* - All date types.

Then select a value for the time period from the drop-down list:

- *Today*
- *Yesterday*
- *Tomorrow*
- *Last 14 Days or Next 14 Days*
- *Last 30 Days or Next 30 Days*
- *Date Range* - Enter start and end dates in the provided fields when you select this option. (An agency-level default can't be set up for this option.)

Click a cycle row to open the application's Plan Reviews page.

## Open Reviews

Plan coordinators can see a list of plan reviews that don't have a cycle decision yet on the Open Reviews page.

This example illustrates the Plan Reviews - Open Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field.

Plan Reviews

All Reviews Open Reviews Unassigned Reviews Pending Reviews Reviewer Workload

My Job

	Cycle	Cycle Due	Application	Application Type	Application Status	Submitted	Property	City	Description	Actions																														
▶	1	4/21/22	ELEC-2022-00028	Electrical	Plan Review	4/7/22	Walnut Street	ALAMEDA	Electrical for an added kitchen island.	⋮																														
<table border="1"> <thead> <tr> <th>Department</th> <th>Reviewer</th> <th>Assigned Date</th> <th>Due Date</th> <th>Decision</th> <th>Decision Date</th> </tr> </thead> <tbody> <tr> <td>Electrical</td> <td>Betsy King</td> <td>4/7/22</td> <td>4/21/22</td> <td></td> <td>&gt;</td> </tr> <tr> <td>Building</td> <td>Lynn Hill</td> <td>4/7/22</td> <td>4/21/22</td> <td></td> <td>&gt;</td> </tr> <tr> <td>Fire Protection</td> <td>Tom Gray</td> <td>4/7/22</td> <td>4/21/22</td> <td></td> <td>&gt;</td> </tr> <tr> <td>Utilities</td> <td></td> <td></td> <td>4/21/22</td> <td></td> <td>&gt;</td> </tr> </tbody> </table>											Department	Reviewer	Assigned Date	Due Date	Decision	Decision Date	Electrical	Betsy King	4/7/22	4/21/22		>	Building	Lynn Hill	4/7/22	4/21/22		>	Fire Protection	Tom Gray	4/7/22	4/21/22		>	Utilities			4/21/22		>
Department	Reviewer	Assigned Date	Due Date	Decision	Decision Date																																			
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Building	Lynn Hill	4/7/22	4/21/22		>																																			
Fire Protection	Tom Gray	4/7/22	4/21/22		>																																			
Utilities			4/21/22		>																																			
▶	1		ELEC-2022-00023	Electrical	Submitted	3/15/22			Install 60A dedicated circuit for tesla charger w/charger install. Carbon monoxide & Smoke ...	⋮																														
▶	1		ELEC-2022-00024	Electrical	Inspection	3/28/22	Clement Avenue	ALAMEDA	Submitting application for electrical plan	⋮																														
▶	1		RESADD-2022-00028	Residential Addition	Inspection	3/31/22	Walnut Street	ALAMEDA	Need to expand the living room of our home by 1250 Sq.ft	⋮																														

As a plan coordinator or plan reviewer, you can turn on the **My Job** switch to display only plan reviews for application types that match the application types assigned to you in your job role configuration.

The row for each plan review cycle displays cycle, application, and property information. Each cycle row expands to show the departments and reviewers assigned to the cycle, reviewer assigned and due dates, reviewer decision, and decision date. You can select the reviewer row to add or change the assigned reviewer depending on your Plan Coordinator job role configuration for application type and department. In the reviewer details, the reviewer drop-down list displays the available reviewers and a count of plan reviews assigned to each of them. The reviewer due date can also be updated.

Click a cycle row to open the application's Plan Reviews page.

## Unassigned Reviews

On the Unassigned Reviews page, you can view:







- Plan review cycles with one or more departments that have no reviewer assigned.
- Required departments that aren't in the cycle.

This example illustrates the Plan Reviews - Unassigned Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field.

Plan Reviews


All Reviews    Open Reviews    Unassigned Reviews    Pending Reviews    Reviewer Workload

My Job    Search

Application	Plan Review Name	Cycle	Cycle Due	Department	Application Type	Description	Property	City	Actions
ELEC-2022-00058	Residential Electrical	1	10/5/22	Building, Fire Protection	Residential Electrical	Residential Electrical	1005 Lincoln Avenue	ALAMEDA	 
ELEC-2022-00059	Residential Electrical	1	10/5/22	Building, Fire Protection	Residential Electrical	Residential Electrical	1005 Lincoln Avenue	ALAMEDA	 
MECH-2022-00026	Residential Mechanical	1	10/5/22	Building, Engineering, Fire Protection	Residential Mechanical	Single family residence.	1719 St. Charles Street	ALAMEDA	 

Each row displays the transaction ID, cycle name and number, cycle due date, unassigned department, application type, and property.

As a plan coordinator or plan reviewer, you can turn on the **My Job** switch to display only plan reviews for application types and departments that match the application types and departments assigned to you in your job role configuration.

Plan coordinators can click the **Assign** icon for a plan review to open the Add Reviewers page: . The **Assign** icon is only available when the plan coordinator's job attributes for application type and department match the plan review's application type and department.

The tabs on the Add Reviewers page list plan reviewers that are associated with the property's plan review district, if there's a district associated with the parcel, and all reviewers. You can filter reviewers by department and assign reviewers to the cycle. You can also view the reviewer workload in a calendar view, featuring a bar chart of daily assignments by reviewer and department, and indicators with total and overdue counts.

For more information about assigning reviewers, see [Managing Plan Reviewers](#).

## Pending Reviews





The Pending Reviews page helps agency staff manage plan reviews with revised documents or waiting for revised documents. Permits and planning applications appear in the pending reviews list when:






- The application is in a plan review status and the applicant has uploaded a PDF document.  
Applications in a plan review status again after the plan was approved, approved with comments, or not required also appear in the list.
- The last plan review cycle was completed with a decision of *Rejected* or *Revision Required*.

This example illustrates the Plan Reviews - Pending Reviews page in the console. The grid is shown in the expanded format, where each column displays only one field.

Plan Reviews

All Reviews   Open Reviews   Unassigned Reviews   Pending Reviews   Reviewer Workload

  My Job      

   	Decision	Decision Date	Review Name	Cycle	Application	Application Type	Application Status	Submitted	Property	City	Description	Actions
	Rejected	4/11/22	Mechanical	1	MECH-2022-00008	Mechanical	Plan Review	4/10/22	Walnut Street	ALAMEDA	Mechanical	

As a plan coordinator or plan reviewer, you can turn on the **My Job** switch to display only plan reviews for application types that match the application types assigned to you in your job role configuration.

When an applicant adds a PDF document to the permit or planning application, an Uploaded Documents icon appears on the permit or planning application row in the pending reviews list as shown in this example. Click the icon to open the Uploaded Documents page where you can preview the file and mark the document as seen.

Click the application row to open the application's Plan Reviews page, where you can create a new cycle and add revised documents to the cycle. For more about working with revised documents, see [Managing Plan Review Documents](#).


## Reviewer Workload


The Reviewer Workload page displays a list of reviewers based on the plan coordinator's assigned plan reviewer departments and application types in the agency staff job attributes. Two views, the grid view and the calendar view, provide reviewer workload information to help manage reviewer assignments. The grid view provides counts of assigned and overdue plan reviews for each reviewer as well as application and plan review details. The calendar view displays a bar chart of daily assignments by reviewer and department, and indicators with total and overdue counts.






















This example illustrates the grid view of the Plan Reviews - Reviewer Workload page in the console.

Plan Reviews

[All Reviews](#)
[Open Reviews](#)
[Unassigned Reviews](#)
[Pending Reviews](#)
[Reviewer Workload](#)





Reviewer	Review Count	Overdue																								
▶ Betsy King	2																									
▲ Gerald Eckhart	1																									
<table border="1"> <thead> <tr> <th>Application</th> <th>Property</th> <th>Description</th> <th>Department</th> <th>Cycle</th> <th>Overdue</th> <th>Due Date</th> <th></th> </tr> </thead> <tbody> <tr> <td>ELEC-2022-00023 Electrical Submitted</td> <td></td> <td>Install 60A dedicated circuit for tesla charger w/charger instal. Carbon monoxide &amp; Smoke alarms required.</td> <td>Building</td> <td>1</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			Application	Property	Description	Department	Cycle	Overdue	Due Date		ELEC-2022-00023 Electrical Submitted		Install 60A dedicated circuit for tesla charger w/charger instal. Carbon monoxide & Smoke alarms required.	Building	1											
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<table border="1"> <thead> <tr> <th>Application</th> <th>Property</th> <th>Description</th> <th>Department</th> <th>Cycle</th> <th>Overdue</th> <th>Due Date</th> <th></th> </tr> </thead> <tbody> <tr> <td> ELEC-2022-00024 Electrical Inspection</td> <td>1827 Clement Avenue ALAMEDA</td> <td>Submitting application for electrical plan</td> <td>Fire Protection</td> <td>1</td> <td><span style="color: red; font-weight: bold;">1</span></td> <td>4/2/22</td> <td></td> </tr> <tr> <td> ELEC-2022-00028 Electrical Plan Review</td> <td>1217 Walnut Street ALAMEDA</td> <td>Electrical for an added kitchen island.</td> <td>Fire Protection</td> <td>1</td> <td></td> <td>4/21/22</td> <td></td> </tr> </tbody> </table>			Application	Property	Description	Department	Cycle	Overdue	Due Date		 ELEC-2022-00024 Electrical Inspection	1827 Clement Avenue ALAMEDA	Submitting application for electrical plan	Fire Protection	1	<span style="color: red; font-weight: bold;">1</span>	4/2/22		 ELEC-2022-00028 Electrical Plan Review	1217 Walnut Street ALAMEDA	Electrical for an added kitchen island.	Fire Protection	1		4/21/22	
Application	Property	Description	Department	Cycle	Overdue	Due Date																				
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 ELEC-2022-00028 Electrical Plan Review	1217 Walnut Street ALAMEDA	Electrical for an added kitchen island.	Fire Protection	1		4/21/22																				

Here are descriptions of the columns displayed on the Reviewer Workload page:

- **Reviewer:** Displays the reviewer name. Click the reviewer name to expand a section that displays application and plan review information. Click a row to open the application's Plan Reviews page.

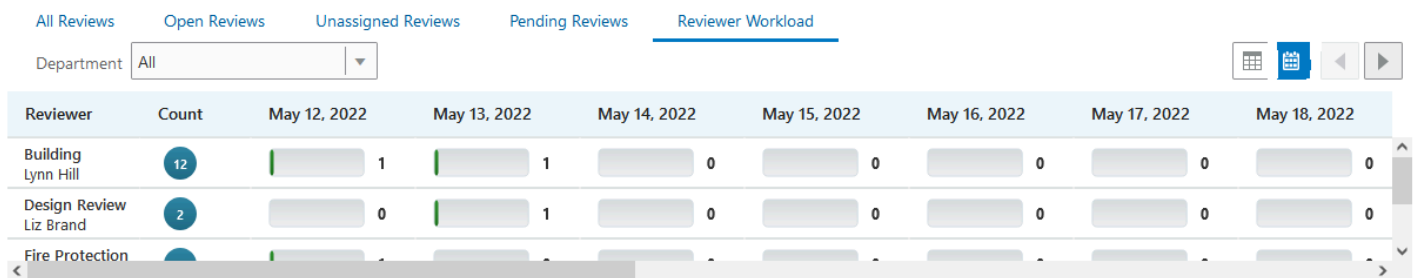
Depending on your Plan Coordinator job role configuration for application type and department, you can click the **Assign** icon for a plan review to display the Reviewer Details modal page. The list of available reviewers that

can be assigned includes the total number of plan reviews assigned to each reviewer. Select a reviewer and a review due date.

- **Review Count:** Displays the number of reviews assigned to a reviewer.
- **Overdue:** Displays the number of reviews that are overdue.

This example illustrates the calendar view of the Plan Reviews - Reviewer Workload page in the console.

## Plan Reviews



The **Count** badge displays the total count for each reviewer-department combination and you can hover over the badge to see the overdue count. The daily count is shown in the graph.

For more information about assigning and reassigning plan reviews to manage reviewer workload, see [Managing Plan Reviewers](#).

## Working with Electronic Plan Reviews

Your agency can conduct plan reviews that contain electronic plan review cycles.

Review cycles for a permit or planning application can be conducted with or without an integration with Bluebeam Studio™ 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.

## Reviewing Imported Bluebeam Comments

Depending on agency setup, Oracle Permitting and Licensing can retrieve supported comments from the associated Bluebeam review session and creates plan review comments when a plan review cycle is finalized. The supported Bluebeam comment types include Note, Textbox, and Comment.

Imported comments include this information:

- Comment text

- Comment author
- Original comment timestamp

The imported timestamp reflects the time the comment was created in Bluebeam, not the time the review cycle was finalized. Replies to Bluebeam comments aren't imported. Imported comments are created as separate Plan Review comments and don't modify existing comments.

## 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
<b>Reviewer</b>	The reviewer name.
<b>Department</b>	The department assigned to the reviewer.  For more information on plan reviewer departments, see <a href="#">Setting Up Plan Reviewer Departments</a> .
<b>District</b>	The district assigned to the reviewer.  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.  For more information on plan review districts, see <a href="#">Setting Up District Types</a> , <a href="#">Setting Up Districts</a> , <a href="#">Assigning Districts to Parcels</a> , and <a href="#">Assigning Districts to Addresses</a> .
<b>Department Count</b>	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
<b>File Name</b>	Displays the file name.
<b>Protected</b>	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.
<b>File Size</b>	Displays the file size.
<b>Uploaded By</b> and <b>Uploaded On</b>	Displays who uploaded the file and when it was uploaded to the application's attachments.
<b>Description</b>	Displays the description that was entered when the file was uploaded to the application's attachments.
<b>Category</b> and <b>Subcategory</b>	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
<b>Processing</b>	<p>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).</p> <p>Documents that the system couldn't retrieve when the cycle is finalized are listed in the <b>Cycle Issues</b> section on the Plan Reviews page.</p>
<b>File Name</b>	Displays the file name.
<b>Protected</b>	Displays shield icons that indicate whether the document is a protected PDF file. See the "Working with Protected Documents" section in this topic for more information.
<b>Description</b>	Displays the description that was entered when the file was uploaded into the system.
<b>State</b>	<p>Displays the state of the document as follows:</p> <ul style="list-style-type: none"> <li>• <i>Initial</i> - Displayed when the document is added to the cycle.</li> <li>• <i>Resubmitted</i> - Displayed when a document with the same name is added to the cycle. Applicants typically upload a revision to the plan review documents after a plan review cycle was rejected or required revisions. Revised documents should be uploaded with the same file name. Once they are added, they are considered <i>Resubmitted</i>.</li> <li>• <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 <b>Documents</b> section can't be edited further.</li> </ul>
<b>Date</b>	Displays the date and time when a document was added to the plan review cycle.
<b>Actions</b>	Displays the <b>Delete</b> 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 <b>Edit Protected Document</b> 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 <b>Archive Protected Document</b> 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 <b>Archive Protected or Protected Editable Document</b> 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 <b>Protected</b> column is blank for documents without any protection settings or that have protection settings that are allowed in Bluebeam Studio™, such as print protection.</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

Search

+ 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 All 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
<b>Assigned By</b> and <b>Assigned Date</b>	Displays the name of the user who made the assignment or system if assigned automatically, and the date when the plan review was assigned.
<b>Due Date</b>	Displays the date the plan review is due. Agency staff with permissions can update the due date.
<b>Status</b>	Indicates the status of the plan review. For example, In Progress.

Page Element	Description
<b>Last Updated By</b> and <b>Last Updated Date</b>	Displays the name of the user who last updated the review decision details and the date when they were last updated.
<b>Reviewer</b>	Select a reviewer from the drop-down list, if the review hasn't been assigned yet.
<b>Decision</b> and <b>Decision Date</b>	<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"> <li>• <i>Approved</i></li> <li>• <i>Approved with Comments</i></li> <li>• <i>Revision Required</i></li> <li>• <i>Rejected</i></li> <li>• <i>Not Required</i></li> </ul> <p>The decision status names in the <b>Decision</b> 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 <a href="#">Setting Up Plan Review Statuses</a>.</p>
<b>Override Reviewer Decision</b> and <b>Override Decision</b>	<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 <b>Override By</b> field shows the name of the user who provided the override decision, and the date appears as well.</p> <p><b>Note:</b> 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>
<b>Comments</b>	<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 <a href="#">Working with Comments</a>.</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 update and delete their own cycle-level and reviewer-level comments, respectively, until the cycle is closed.

For more information about security for managing plan review comments, including comments imported from electronic plan reviews, see [Security Details for Managing Plan Reviews](#).

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 application 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 until the cycle is closed.

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 until the cycle is closed. 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 ×

**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.

## Working with Imported Bluebeam Comments

Imported Bluebeam comments are created automatically when a plan review cycle is finalized, depending on agency setup. The imported records contain the original comment author and timestamp from Bluebeam.

Plan coordinators can update the public or private visibility of imported comments after the review cycle is completed, allowing agencies to control which comments are visible to public users.

**Note:** Imported comments can't be edited or deleted; they are retained as a part of the plan review on the application.

For more information, see [Working with Electronic Plan Reviews](#).



# 11 Working with Permit Inspections

## Security Details for Working with Permit Inspections

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Agency Permits Inquiry	View inspections.	PSC Agency Staff - All Agency users
PSC Schedule Inspection	Schedule inspection.	PSC Inspections Supervisor PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician PSC System Administrator
PSC Inspection Request Management	Manage inspection requests.	PSC Inspections Supervisor PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician PSC System Administrator
PSC Registered Public User	Schedule and cancel inspection for permits on which the user is the applicant or a contact with access.  View inspection attachments on applications on which the current user is the applicant.	PSC Registered Public User

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Cancel Inspection Request	Cancel inspection request.	PSC Inspections Supervisor PSC Chief Building Officer PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC Permit Technician PSC System Administrator
PSC Add Inspection Checklist	Add inspection checklist.	PSC Inspections Supervisor PSC Building Inspector PSC System Administrator
PSC Add Inspection Checklist Items	Add inspection checklist items.	PSC Inspections Supervisor PSC Building Inspector PSC System Administrator
PSC View Inspection Attachments	View inspection attachments.	PSC Agency Staff - All Agency Users
PSC Add Comments to Inspections	Add comments to inspections.	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 System Administrator PSC Permit Technician
PSC Inspections Attachments User	Manage inspection attachments.	PSC Inspections Supervisor PSC Geographical Information System Administrator

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Delete Inspection Comments added by others and self	Delete inspection comments added by others and themselves.	PSC System Administrator
PSC Add Inspection Attachments	Add inspection attachments.	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 Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Update Inspection Attachments added by self	Update inspection 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 Business Analyst PSC Building Inspector

Primary Role	Access Description	Associated Job Roles and Abstract Roles
		PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Delete Inspection Attachments added by others and self	Delete inspection comments added by others and themselves.	PSC System Administrator
PSC Delete Inspection Attachments added by self	Delete inspection comments 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 Business Analyst PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer PSC Permits Supervisor PSC System Administrator PSC Permit Technician
PSC Permits Management with Elevated Access	Add comments to inspections after they are closed. Add attachments to inspections after they are closed.	PSC Permits Supervisor
PSC Inspections Supervisor	Manages the workflow and people to get through inspection jobs everyday. Keeps track of inspectors, districts, and workload.	PSC System Administrator

For more information on creating roles for Oracle Permitting and Licensing, see *Creating Custom Roles for Oracle Permitting and Licensing*.

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

## Overview of Working with Inspections

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

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

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

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

Unannounced inspections are set up by the agency and are hidden from public view. When an inspection is unannounced, applicants and contacts with application access won't receive any communications so that they don't know when the inspection is scheduled to take place. Only agency staff can see which inspection types are unannounced, on the inspection request page, in the agency's view of inspection details, and in the application details. Once the inspector provides the results, the applicant and contacts with application access can finally see the inspection details and results. Only agency staff with permissions can request a reinspection for an unannounced inspection that has failed. Unannounced inspections can be created by agency staff on a completed business license.

## Inspection Request Considerations

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

Inspection Issue	Description
Incomplete dependencies	<p>Agencies may only allow inspections to be performed after prerequisite inspections are completed with a passing or corrected result, but agency staff can override dependency requirements when assigning, reassigning, or scheduling inspections. Applicants can't schedule an inspection or update a pending inspection that has prerequisite inspections.</p> <p>If you have selected multiple inspections, you can schedule only the inspections with no dependency requirements or prerequisites that are already complete with a Pass or Corrected result.</p> <p>Agencies identify inspection dependences in the inspection setup on the global Inspection Dependencies page and Inspection Group page.</p> <p>Agency staff with permissions can modify inspection dependencies on the Update Dependencies page accessed from the Inspections list page in the permit or business license details.</p>

Inspection Issue	Description
Missing district	<p>Assigning districts to properties is required setup for inspection requests and scheduling. Agency staff can create pending inspections with an incorrect or missing district if the agency supports pending inspections.</p> <p>Inspections are scheduled and assigned based on the district associated with a property. For properties associated with a parcel, you assign districts to the parcel on the Parcel District page. For properties with an address, but no parcel, use the Address District page to assign districts to a property.</p>
Preexisting pending inspections	<p>If your agency supports pending inspections, the system prevents you from creating a new or duplicate inspection when an inspection of the same type is already pending. You can schedule the existing pending inspection.</p> <p>Use the Inspections section of the agency's Permit Options page to configure how your agency handles pending inspections.</p>
Incomplete required inspections before the final inspection	<p>You can't schedule a final inspection or assign a pending final inspection to an inspector until all of the required inspections for the permit are complete with a passing or corrected result.</p> <p>If one of multiple inspections selected is the final inspection and there are incomplete required inspections, you won't be able to create the final inspection. If the final inspection is in a pending status and there are incomplete required inspections, agency staff or applicants can't assign the inspection.</p> <p>Agencies identify required inspections and the final inspection in the setup on the Inspection Group page.</p> <p>If an inspection type is defined as required in the inspection group, but you turn off the <b>Required</b> switch when the inspection is created, then it's no longer considered a required inspection when completing the final inspection. The reverse is also true: You can turn on the <b>Required</b> switch to make the inspection required.</p>
Business license and business license transaction conditions	<p>Conditions on the business license or business license transaction such as Prevent Inspection Schedule, Prevent Inspection Result, or Prevent Final Inspection can prevent you from scheduling or providing results for an inspection or prevent you from adding or proceeding with a final inspection.</p>
Business license fees due before the final inspection	<p>Agencies may configure a stop process action in the Business Rules Framework to prevent you from creating or scheduling a final inspection when fees are outstanding.</p> <p>The stop process action isn't triggered by requests made in the Inspector Application. However, requests sent from a browser running on a mobile device will still trigger the stop process action.</p> <p>Agencies configure stop process actions in the Business Rules Framework.</p>

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

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

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

## Managing Inspections for a Permit

The permit information includes a consolidated list of inspections related to a permit and subapplications, if any. As a permit coordinator, you manage inspection activity for a permit—including status, inspection results, code or requirement violations, and more—on the Inspections list page in the permit details.

As agency staff, you use the Inspections list page in the permit details to view a complete list of inspections for a permit application and its subapplications, if any. Registered public users only see inspections in the list for permits for which they are the applicant or a contact with permit access.

Depending on your permissions as agency staff, here's how you can manage inspections on the Inspections page in the permit details:

- Manage inspection activity for a primary permit and its subapplications, if any.
- Access inspection details.
- Request, schedule, postpone, reschedule, cancel, or claim an inspection.
- Assign an inspection.
- Work with inspection types for which the inspector arrives unannounced at the inspection site.

For information about subapplications associated with a permit, see [Linking Primary and Subapplications](#).

You can view the same information and perform many of the same actions on other inspection pages as well, including the inspection request page for a permit. For more information, see [Requesting and Scheduling Inspections](#). For more information about the agency Inspections list for agency staff, see [Managing Inspections for an Agency](#). For information about using the Inspector Application on a mobile device to manage permit and license inspections, see [Viewing Inspection Tasks](#) and [Managing Scheduled Inspections](#).

## Viewing Inspection Activity

Here's how to view the inspections associated with a permit.

1. After you access the permit, expand the **Progress** section in the left navigation panel.
2. Click the **Inspections** menu item in the left navigation panel to open the inspections list for the permit.
3. On the permit's Inspections list page, use the search or filter for finding or viewing the inspections in the grid. Enter text in the search field or use delivered filters, such as the status or completed date range, when available. Remove the search text if no matching inspections were found.
4. Here's how you can monitor inspection activity in the grid:

Page Element	Description
<b>Inspection</b>	Displays the inspection number. Click the inspection number link or row to open the inspection details pages. Inspection numbers are automatically generated based on the autonumbering definition in the inspection type.
<b>Inspection Type</b>	Displays the inspection type, for example, <i>406 Drywall</i> . The inspection type determines the scheduling method, assessment type, passing rule, rating method, scoring method, type of inspection checklist, and so on. For more information, see <a href="#">Setting Up Inspection Types</a> .

Page Element	Description
<b>Required</b>	Indicates whether an inspection type is required.
<b>Unannounced</b>	Indicates whether the inspection type is for an inspection where the inspector arrives unannounced, without any prior communication sent to the applicant. Unannounced inspections are hidden from applicants and contacts with application access until the inspector has submitted the inspection results. For more information, see <a href="#">Setting Up Inspection Types</a> and <a href="#">Setting Up Inspection Groups</a> .
<b>Status</b>	View the inspection status, in a badge. Depending on the inspection statuses defined by your agency, the status can be one of these: <ul style="list-style-type: none"> <li>○ <i>Scheduled</i></li> <li>○ <i>Requested</i></li> <li>○ <i>Completed</i></li> <li>○ <i>Canceled</i></li> <li>○ <i>Pending</i></li> </ul>
<b>Reinspect</b>	Click to schedule a reinspection. This link is available when the inspection has failed.  The reinspection request has a new inspection ID, and it includes all of the information from the failed inspection. Before submitting the reinspection request, you must enter the required scheduling information based on the scheduling method of the inspection.  For more information, see <a href="#">Requesting and Scheduling Inspections</a> .
<b>Assign</b>	Click the link to assign an inspector to the inspection. For more information, see <a href="#">Assigning Inspections</a> .
<b>Result</b>	View whether the inspection passed or failed. For more information, see <a href="#">Viewing Inspection Results</a> .
<b>Preferred Date</b>	Displays the preferred date and time for inspections configured with the <i>Request</i> scheduling method. Depending on your agency's setup, you may only be required to enter a date.
<b>Ready By</b>	Displays the date and time when the work is ready to be inspected for inspections configured with the <i>Ready</i> scheduling method. Depending on your agency's setup, scheduling may only require a date.
<b>Scheduled</b>	Displays the date or date and time when the inspection is scheduled.

Page Element	Description
	Depending on your agency's setup, you may be required to enter only a date or time range when scheduling the inspection.
<b>Inspector Arrival</b>	Displays a value that indicates when the inspector will arrive as viewed by the applicant or contacts with application access. When the scheduled start is a date only, the same date appears for the arrival. If your agency has set up scheduled time ranges, you might see a value such as <i>Morning</i> or <i>Afternoon</i> .
<b>Completed</b>	Displays the date and time when the inspection was completed.
<b>Application</b> and <b>Application Type</b>	<p>Displayed only when there's a primary and subapplication relationship for the permit. Indicates the permit number and permit type that this inspection is for.</p> <p>Click the application link to access the application details.</p>
<b>Property</b> and <b>City</b>	View the address of the property and the city associated with the inspection.
<b>Relationship Type</b>	<p>Displayed only when there's a primary and subapplication relationship for the permit. The relationship type indicates whether the inspection is associated with the primary permit (<i>Primary</i>) or one of its subapplications (<i>Subapplication</i>).</p> <p>You can click the column title to change the sort order to display inspections associated with primary permits or with subapplications first.</p>
<b>Reference Entity</b>	Displayed only when there are reference entities linked to the permit that have been selected for inspection during scheduling. Click the entities link to review the entity details. For more information, see <a href="#">Linking Reference Entities to a Permit</a> .
<b>Inspector</b>	<p>Identifies the inspector assigned to the inspection.</p> <p>The date or date and time of the scheduled inspection is displayed beneath the inspector's name.</p> <p>Public users can't see the inspector name on inspections or request inspectors.</p>
<b>Due Date</b>	Displays the scheduled date for automatically created recurring inspections. For example, a fire inspection scheduled in a year. If you reschedule or postpone the inspection, the <b>Due Date</b> displays the original date the inspection was expected to be performed.
<b>Reinspection</b>	<p>For failed inspections that have been reinspected, this column displays the unique identifier for the reinspection.</p> <p>For reinspections, this column displays the unique identifier of the original failed inspection.</p>

Page Element	Description
	<p><b>Note:</b> Reinspection information appears after you submit a reinspection request.</p>

- Click the three-dot **Actions** icon button in the inspection row to view the available menu items for the inspection based on your permissions and the inspection status.

Page Element	Description
<b>View Details</b>	<p>Select to view the inspection details. This option is available for all inspection statuses.</p> <p>For more information, see <i>Reviewing Inspection Details</i>.</p>
<b>Postpone</b>	<p>Select to take an inspection off the schedule. This action moves the inspection into the <i>Pending</i> status. You can postpone inspections that have been requested or scheduled status when you want to wait to schedule the inspection. Agency staff can always postpone inspections, but registered public users can only postpone or cancel inspections based on the agency-level options for permits and business licenses.</p>
<b>Cancel Inspection</b>	<p>Select to permanently remove the inspection. This action can't be undone, but if needed, you can request a new inspection.</p> <p>Agency staff can manually cancel inspections on the Inspections list page, but registered public users can only cancel their inspections, depending on the agency-level setup for permits or business licenses, in the inspection details. Inspections can also be canceled automatically when an agency staff member withdraws the application associated with the inspection request.</p>
<b>Reschedule</b>	<p>Select to remove the inspection from the schedule and request or select a different time or date, depending on the scheduling method for the inspection type. For inspections configured with the <i>Ready</i> scheduling method, you enter a new date and time when the work is ready to be inspected. For inspections configured with the <i>Request</i> scheduling method, you enter a new preferred date and time. Depending on your agency's setup, you may only be required to enter a date.</p>
<b>Assign</b>	<p>Select to assign an inspector to the inspection. For more information, see <i>Assigning Inspections</i>.</p>
<b>Assign to Me</b>	<p>Claim a scheduled inspection assigned to another inspector. This action is available when the inspector who claims the inspection has the Building Inspector job function with district and inspection type job attributes that match the inspection's district and type attributes.</p>

Page Element	Description
	<p>If you want to reschedule the inspection, click the <b>View Detail</b> action to select a new date and time on the Inspection Detail page. Depending on your agency's configuration, you may only be able to select a date.</p> <p>Inspectors can also claim inspections on the Inspections console page for agency staff and in the Inspector Application for performing permit or business license inspections on a mobile device.</p>

For more information about canceling, rescheduling, and postponing inspections, see [Rescheduling, Postponing, and Canceling Inspections](#).

6. In addition to adding a new inspection by clicking the **Add (+)** button, you can select one of these options, when available:
  - o **View Subapplications**
  - o **View Dependencies**
  - o **Update Dependencies**

For more information, see the next section, "Adding and Managing Inspections for a Permit."

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

## Adding and Managing Inspections for a Permit

You can't create a new or duplicate inspection when an inspection of the same type is already in a *Pending* status; however, you can schedule the existing pending inspection.

Page Element	Description
<b>Add</b>	<p>Click the <b>+</b> button to request an inspection on the <b>Add inspection</b> drawer.</p> <p>You can't create a new or duplicate inspection when an inspection of the same type is already in a <i>Pending</i> status; you can schedule the existing pending inspection.</p> <p>For more information, see <a href="#">Requesting and Scheduling Inspections</a>.</p>
<b>Update Dependencies</b>	<p>Click the link to view and modify the prerequisite inspections for each inspection type associated with the primary permit and any subapplications that are linked to it. On the Update Dependencies page, you can review all of the inspection types, including whether the inspection type is required or final. Expand the inspection row to add or remove prerequisite inspections. For more information, see <a href="#">Working with Inspection Dependencies</a>.</p> <p><b>Note:</b> Unannounced inspection types can't have prerequisite inspections or be prerequisite inspections for other inspection types. The dependencies setup is unavailable for unannounced inspections.</p>

Page Element	Description
<b>View Dependencies</b>	Click the link to view a graphical representation of the default prerequisite inspections and any updates. Agency staff and public users with application access can view the dependencies as well as required inspections. For more information, see <i>Working with Inspection Dependencies</i> .
<b>View Subapplications</b>	Click the link to view the subapplications linked to the primary permit. You can also click <b>Linked Permits</b> in the left navigation panel of the permit details. See <i>Working with Linked Permits</i> .

## Managing Inspections for an Agency

Agency staff and system administrators manage activity for all of the agency's inspections on the Inspections list page displayed using the Redwood Experience. For permits, agency staff can also view inspections that were automatically created as pending inspections, reinspections, or recurring inspections based on permit type setup.

Use the Inspections page for agency staff to view a complete list of inspections for every application. From this page you can manage the full inspection life cycle.

This example illustrates the **All** tab on the agency's Inspections list page when both permits and business license offerings are set up for inspections. The Actions menu for an inspection displays actions available to be performed for the inspection.

Go to Home

## Inspections

Active Applications X Search RESADD-2026-00002 Status Scheduled (34) Completed Date Last Month (6) Completed Date Range 3/16/26 - 3/16/26 Last Updated Date Last Month (53) ...

+ Assign Multiple All My Job Download Grid

Inspection	Inspection Type	Required	Unannounced	Status	Reinspect	Assign	Conditions	Balance (USD)	Classification	Result	Preferred Date	Ready By	Sched	Actions
BLDG-INSP-2026-00073	Fire Exting	Yes		Completed					Business Licenses	Inspection p			3/13/26	...
BLDG-INSP-2026-00061	101 Survey/S...	No		Scheduled		Reassign	Hold	591.00	Permits		2/19/26		2/19/26	...
INSP-2026-00004	Rough Mecha...	No		Scheduled		Reassign			Permits					+
BLDG-INSP-2026-00045	503 Rough El...	Yes		Scheduled		Reassign		25.00	Permits		2/17/26			⊖
BLDG-INSP-2026-00041	105 Slab Foun...	No		Scheduled		Reassign		25.00	Permits		2/19/26			🔍
BLDG-INSP-2026-00067	411 Roof/In P...	Yes		Scheduled		Reassign		Paid	Permits					🕒
BLDG-INSP-2026-00063	108 Demolition	No		Scheduled		Reassign	Hold	591.00	Permits		2/25/26			⊗
BLDG-INSP-2026-00059	404 Rough Fr...	No		Scheduled		Reassign		Paid	Permits		2/26/26			📅
BLDG-INSP-2026-00046	406 Drywall	No		Scheduled		Reassign		25.00	Permits		2/17/26			👤

Licenses Permits All

Here are some of the actions that agency staff with required job roles and job attributes can perform on inspections:

- Add inspections.
- Manually assign or reassign individual inspections.
- Automatically assign or reassign multiple inspections at once.
- View inspection details.
- View inspection request.
- Cancel, reschedule, and postpone inspections.
- View pending inspections.
- View unannounced inspections.
- View all inspections or only inspections assigned to the logged in user.
- Request reinspections for failed inspections, or view reinspections that were automatically created after a failed permit inspection was completed.
- View recurring inspections that were automatically created after a completed permit inspection matched the agency's recurring inspection setup.

When applicants and contacts with permit or business license access click the Inspections tile on their landing page after logging in, they see a modified version of the agency's Inspections list page. From the public user's inspection list, they can access inspection details and schedule additional inspections for the permits and business licenses they are associated with. Applicants can turn on the **Active** switch to show only inspections for permit or business license applications that are in an active status.

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

## Using Inspection Search

Use the filter chips and filter values in the Search field on the agency's Inspections list page. For more information about setting up the default inspection filters and default filter behavior, see [Setting Up the Agency Inspections List](#).

The **Active Applications** filter displays inspections only for applications (permit and business license) that are active

The agency inspections list shows inspections for active permit and business license applications. Agency staff can filter inspections in the list by one or more statuses using the **Status** filter:

- Pending
- Requested
- Scheduled
- Completed
- Canceled

The **Reinspect** filter shows inspections that have failed and don't yet have a reinspection created.

Use the **Autocreated** filter to show inspections that were automatically created as pending inspections, reinspections, or recurring inspections.

**Note:** The **Reinspect** filter shows failed inspections that don't yet have a reinspection created, whereas the **Autocreated** filter shows inspections that were created automatically by the system.

You can filter by either a relative date (for example, Today, Next Week, Next Month, and so on) or by a date range (with from and through dates) for the respective date types:

- **Scheduled Date** or **Scheduled Date Range**
- **Preferred Date** or **Preferred Date Range**
- **Ready-by Date** or **Ready-by Date Range**
- **Completed Date** or **Completed Date Range**
- **Last Updated Date** or **Last Updated Date Range**

You can select the **My Job** filter button above the grid to display inspections by the districts and inspection types that have been set up in your Job Function and Job Attributes. The **All** filter button indicates that inspections are listed regardless of district or inspection type for the logged in user.

## Working with Inspection Information

Open the Inspections page from the Permitting and Licensing home page.

On the Inspections list page, agency staff can view inspection information on three tabs, depending on the offerings implemented by your agency:

- **All** - View all inspections.
- **Permits** - View permit inspections.
- **Business Licenses** - View license inspections.

On each tab, you can view inspection information including these fields:

Page Element	Description
<b>Inspection</b> and <b>Inspection Type</b>	<p>Displays the automatically generated inspection number and the inspection type.</p> <p>Inspection types determine the scheduling method, assessment type, passing rule, rating method, scoring method, type of inspection checklist, and so on. For more information, see <a href="#">Setting Up Inspection Types</a>.</p> <p>The inspection type is displayed beneath the inspection number in the condensed grid format.</p>
<b>Required</b>	<p>Indicates whether this inspection type is required for the application. The agency determines which inspection types are required on the inspection group setup page or when an inspection is added by authorized agency staff.</p>
<b>Unannounced</b>	<p>Indicates whether the inspection type is for an inspection where the inspector arrives unannounced, without any prior communication sent to the applicant. Unannounced inspections are hidden from applicants and contacts with application access until the inspector has submitted the inspection results. For more information, see <a href="#">Setting Up Inspection Types</a> and <a href="#">Setting Up Inspection Groups</a>.</p>
<b>Status</b>	<p>View the inspection status, which can be one of these, depending on the inspection statuses defined by your agency:</p>

Page Element	Description
	<ul style="list-style-type: none"> <li>• <i>Scheduled</i></li> <li>• <i>Requested</i></li> <li>• <i>Completed</i></li> <li>• <i>Canceled</i></li> <li>• <i>Pending</i></li> </ul> <p>The inspection status is displayed beneath the inspection type in the condensed grid format.</p>
<b>Reinspect</b>	<p>Click the link for a failed inspection to access the Inspection Request page where you can submit a reinspection request for a failed inspection.</p> <p>The reinspection request has a new inspection ID, and it includes all of the information from the failed inspection. Before submitting the reinspection request, you must enter the required scheduling information based on the scheduling method of the inspection.</p>
<b>Assign</b>	<p>Click the link to manually assign an inspection to an inspector for a specific date and time or date only on the Scheduling modal page, depending on agency setup. The link appears only for users with the PSC Inspections Supervisor role for unassigned inspections.</p> <p>If an inspection is already assigned but not yet completed, you can click the <b>Reassign</b> link to reassign the inspection.</p> <p><b>Note:</b> A warning appears when you assign or reassign an inspection with prerequisite inspections that haven't passed or been corrected.</p> <p>For more information, see <a href="#">Assigning Inspections</a>.</p>
<b>Classification</b>	<p>Appears on the <b>All</b> tab to distinguish between inspections created for <i>Permits</i> and <i>Business Licenses</i>.</p>
<b>Result</b>	<p>Displays the inspection result, such as whether the inspection passed or failed. For example, a business license inspection may show an <i>Approved</i> result.</p>
<b>Preferred Date</b>	<p>Displays the preferred date and time or time period for the requested inspection if the scheduling method for the inspection type is <i>Request</i>.</p> <p>If your agency sets up the <i>Request</i> scheduling method in permits or business licenses to show the date only, you won't see the time range in the <b>Preferred Date</b> column.</p>
<b>Ready By</b>	<p>Displays the date and time or time period when the requested inspection is ready if the scheduling method for the inspection type is <i>Ready</i>.</p> <p>If your agency sets up the <i>Ready</i> scheduling method in permits or business licenses to show the date only, you won't see the time in the <b>Ready-by Date</b> column.</p>
<b>Scheduled</b>	<p>Displays the scheduled date, date and time, or time period for the inspection. If your agency sets up the <i>Schedule</i> scheduling method in permits or business licenses to show the date only, you won't see the time in the <b>Scheduled</b> column.</p>

Page Element	Description
<b>Due Date</b>	Displays the due date for the inspection. For automatically created reinspections and recurring inspections, the due date is populated with the scheduled date so agency staff can track the original due date if the inspection is later postponed or rescheduled.
<b>Inspector Arrival</b>	Displays the inspector's estimated time of arrival at the inspection location.
<b>Completed</b>	Displays the date and time when the inspection was completed.
<b>Application and Application Type</b>	Displays the automatically generated application number or ID associated with the inspection. Click the application ID link to access the overview or summary page for the application.  For more information on application types with inspections, see <a href="#">Setting Up Permit Types</a> or <a href="#">Setting Up Business License Types</a> .
<b>Property and City</b>	Displays the address of the property and city associated with the inspection.  You can sort the <b>Property</b> column by the street name, first line of an address, or city by clicking the arrow icon on the column header and selecting <i>Street</i> , <i>Address</i> , or <i>City</i> in the condensed grid format.
<b>Relationship Type</b>	For permit inspections only, indicates whether the inspection is associated with the primary permit ( <i>Primary</i> ) or one of its subapplications ( <i>Subapplication</i> ). You can click the column title to change the sort order to display inspections associated with primary permits or with subapplications first.
<b>Relationship Details</b>	For permit inspections only, a <b>View Subapplications</b> link is displayed when the permit associated with the inspection is a primary inspection. When the permit associated with an inspection is a subapplication, the primary permit number appears as a link to the primary permit.
<b>Permit Period</b>	Appears on the <b>Permits</b> tab for renewable permit inspections, displays the permit period associated with the inspection.
<b>Activity</b>	Displays the application activity associated with the inspection. For renewable permit inspections, values can identify origination or renewal activity. For business license inspections, values can identify business license activity such as origination, renewal, or amendment.
<b>Autocreated</b>	Indicates whether the inspection was automatically created. For permit inspections, the value can identify inspections automatically created as pending inspections, reinspections, or recurring inspections. Blank indicates that the inspection wasn't automatically created.  For recurring inspections, the value can identify the inspection that the recurrence is based on ( <b>Recurring from &lt;inspection ID&gt;</b> ). For reinspections, the reinspection relationship is also shown in the <b>Reinspection</b> column.
<b>Doing Business As</b>	Appears on the <b>All</b> and <b>Business Licenses</b> tabs for business license inspections to display the name the business is running under (also known as DBA).
<b>Inspector</b>	Displays the name of the inspector assigned to the inspection.
<b>Reinspection</b>	Displays reinspection relationship information after a reinspection has been requested or automatically created.

Page Element	Description
	If the row is for a reinspection, this column identifies the original failed inspection ( <b>Reinspection of &lt;inspection ID&gt;</b> ). If the row is for a failed inspection that has been reinspected, this column identifies the reinspection.

## Viewing Automatically Created Permit Inspections

For permit inspections, agencies can configure the system to automatically create pending inspections, reinspections, and recurring inspections. Automatically created inspections appear on the agency’s Inspections list page with the same inspection information as other inspections.

A failed inspection can automatically create a reinspection when the inspection is resulted and reaches Completed status. A completed inspection with a configured result can create one or more recurring inspections based on the permit type setup.

Use the **Autocreated** field to identify inspections that were created automatically. Use the **Reinspection** field to view the relationship between a failed inspection and its reinspection. The **Due Date** field helps agency staff track the original due date for automatically created inspections if the inspection is later postponed or rescheduled.

Because automatic reinspections and recurring inspections are created through Business Rules Framework processing, they might not appear immediately after the triggering inspection is completed.

For more information, see [Setting Up Recurring Inspections and Reinspections](#).

## Performing Actions for Inspections

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

You can access actions on the page or by clicking the three-dot actions icon in the **Actions** column:

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

Page Element	Description
<b>+ (Add) or Add Inspection</b>	<p>Click to request inspections for an application. You can request an additional inspection for the permit associated with the inspection using the <b>Actions</b> menu in the inspection row. See also <a href="#">Requesting and Scheduling Inspections</a> and <a href="#">Managing Scheduled Inspections</a>.</p> <p>When the application status is <i>Withdrawn</i> or <i>Completed</i>, you will no longer be able to add new inspections. You can, however, add inspections for business licenses in a <i>Completed</i> status.</p> <p>If your agency supports pending inspections, the system prevents you from creating a new or duplicate inspection when an inspection of the same type is already pending. You can schedule the existing pending inspection.</p>
<b>View Detail</b>	Click to view the inspection details on the Inspection Detail page. See <a href="#">Reviewing Inspection Details</a> .
<b>Postpone</b> <b>Cancel Inspection</b>	For information about canceling, rescheduling, and postponing inspections, see <a href="#">Rescheduling, Postponing, and Canceling Inspections</a> .

Page Element	Description
Reschedule	

**Note:** If a permit inspection was automatically created as a pending inspection, reinspection, or recurring inspection, agency staff can work with it from the Inspections list using the available actions for its status, such as viewing details, assigning, rescheduling, postponing, or canceling the inspection.

For information about assigning inspections, see the next section in this topic and [Assigning Inspections](#).

## Assigning Inspections from the Agency Inspections List

When you have the Inspections Supervisor role, you can manually assign individual inspections or perform a bulk assignment, and override any inspection dependency warnings.

Page Element	Description
Assign Multiple	<p>Click the button as the first step for automatically assigning or reassigning multiple inspections in a batch. Only inspections that can be assigned or reassigned appear in the list of available inspections. Select the inspections you want to assign or reassign, then click the <b>Assign</b> button.</p> <p>On the Assign drawer, select any inspectors to exclude from assignment. Inspections won't be assigned to the inspectors you select in the list.</p> <p>If you turn on the <b>Exclude District</b> switch, the District attribute isn't considered for the inspector when making the assignment. If you turn on the <b>Exceed count limit</b> switch, all inspections will be assigned to the first inspector when the system is configured to have the Assignment Method set to Count.</p> <p>For more information, see <a href="#">Assigning Inspections</a>.</p>
Assign or Reassign	<p>Click the link to manually assign or reassign an inspection to an inspector for a specific date and time on the Scheduling modal page. The link appears only for users with the PSC Inspections Supervisor role.</p> <p>If an inspection is already assigned, but not yet completed, you can use link to reassign the inspection.</p> <p><b>Note:</b> You'll receive a warning when you assign or reassign an inspection with prerequisite inspections that haven't passed or been corrected.</p> <p>For more information, see <a href="#">Assigning Inspections</a>.</p>

Inspectors who want to claim scheduled inspections assigned to another inspector with the same district and inspection type setup can do that on the Inspections page in the application details or in the Inspector Application for mobile devices. For more information, see [Modifying Inspection Requests](#) and [Working with Inspection Details](#).

## Requesting and Scheduling Inspections

Agency users can request and schedule inspections for permits and business license applications to ensure compliance with application requirements. This topic reflects the page elements for adding inspections when you're viewing applications using the Redwood Experience, but the inspection information and process is the same regardless of the different look and feel.

The Add Inspection request page for a single inspection can look like this when a time hasn't been selected yet:

### Add Inspection

Cancel Submit

#### Details

Required

Pending

Application ID: WTRHTR-2025-00002

Application Type: Water Heater

Description: Applying for water heater application

#### Selected inspections

Water Heater Inspection - Required

Time not selected yet

Ready  
Select a time

### Request

Address: 1708 2ND ST, ALAMEDA, CA 94501

Inspection Location

Comments

Location Contact: Abby Scott Select from List

Preferred Contact Method: Email

Phone

Country: US Mobile Phone

Email: abby.scott@oracle.com

**ORACLE**

The scheduling link will display either **Select a Time** or **Select a Date** based on setup in the agency-level permit options, in the **Scheduled Time Range** section. In this example, you must click the **Select a Time** link to schedule the inspection because the inspection was setup with a Time Entry Method of *Specific Time* for the Schedule scheduling method. For more information, see [Setting Up Agency-Level Options for Permits](#).

If you selected more than one inspection type, they are all displayed in a **Selected Inspections** list. The inspection's scheduling link will display **Select a Time** for any scheduling method as long as the Time Entry Method in the agency options isn't set to *Date only*. If any of the scheduling methods have the Time Entry Method set to *Date only*, then the link will display **Select a Date**, because only a date value is used (preferred date, ready-by date, or assignment date, when the setup uses the count assignment method for inspectors). For more information about the different scheduling methods that inspections can have, see [Assigning Inspections](#) and agency-level setup documentation.

For information about adding, updating, or canceling scheduled inspections in the Inspector Application using a mobile device, see [Managing Scheduled Inspections](#). See also [Rescheduling, Postponing, and Canceling Inspections](#).

## Adding an Inspection to an Application

Here's how to add an inspection from the Inspections page in the permit details:

1. Click the **+** (**Add**) button.
2. On the **Add inspection** drawer, the information for the application you are working on is reflected in the fields. When the permit application status is *Withdrawn* or *Completed*, you can't add new inspections anymore. However, you can add inspections for business licenses in a *Completed* status.
3. Turn on the **Pending** switch to set the status of the selected inspection to *Pending*. This option is available only if set up by the agency and isn't available for registered public users. For more information, see the "Working with Pending Inspections" section in this topic.
4. In the **Select inspections** section, click the **Inspection Group** button to see a list of the inspection types that are available based on the inspection group associated with the permit application type.

**Note:** Agency staff can select the **All** button to view all inspection types available for selection. The **Inspection Group** and **All** buttons aren't available to public users; they only see a list of inspection types associated with the inspection group.

For each inspection type listed in the **Select inspections** section, you'll see this information:

Page Element	Description
Inspection type description	Displays the description set up for the inspection type code.
Prerequisites	Displays prerequisite inspection types, if any.
<i>Final inspection</i>	Indicates that this is the last inspection that needs to be done to complete the application.
<b>Required</b> badge	Indicates that this inspection type is required to complete the application.
<b>Unannounced</b>	Indicates whether the inspection type is for an inspection where the inspector arrives unannounced, without any prior communication sent to the applicant. Unannounced

Page Element	Description
	inspections are hidden from applicants and contacts with application access until the inspector has submitted the inspection results.

5. Select the check box next to each inspection type that you want to add.
6. Click **Continue** to access the **Add Inspection** request page.
7. Select values for these fields:

Page Element	Description
<b>Required</b>	<p>Turn on the switch to make an inspection required.</p> <p>The <b>Required</b> option defaults to the inspection type setting on the Inspection Group Details page. If the inspection is outside of the inspection group or is an unannounced inspection, the setting defaults to not required.</p> <p>Public users can't change the <b>Required</b> setting for an inspection.</p>
<b>Pending</b>	<p>Turn on the switch to make this inspection a pending inspection on the inspection request page.</p> <p>Public users can't change the <b>Pending</b> setting for an inspection. For more information, see the "Working with Pending Inspections" section in this topic.</p>

8. Depending on agency-level setup, click the **Select a Time** or **Select a Date** link to request or schedule the inspection.

Depending on the scheduling method set up for the inspection type, agency staff and applicants can enter times in the preferred date and time fields or ready-by date and time fields, or select a time. Depending on agency setup, only date fields or date and a time range may be available. See the section, "Selecting an Inspection Time" for more information.

9. Click the **Remove** action menu item to remove inspection types that you don't want to include in your inspection request. At least 1 inspection type is required in the request.

10. In the **Request** section:

- o Enter or update the address, inspection location, comments, location contact, and location contact's contact information.
- o (Optional) Select a **Reference Entity** from the drop-down list.

This option is only available depending on agency setup for reference entities and permits. Depending on setup, you may be able to further refine the inspection to indicate reference entity attributes. For more information, see the "Adding Reference Entities to Inspections" section in this topic.

11. Click the **Submit** button.

For information about updating and viewing dependencies, see [Working with Inspection Dependencies](#). For information about working with subapplications, see [Working with Linked Permits](#).

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

## Selecting an Inspection Time

The **Select a Time** or **Select a Date** link will always be displayed, regardless of the scheduling method set up by your agency for the inspection type. In the Redwood Experience, click the scheduling link to open the drawer where you can add a time or date: Ready-by Date/Time; Preferred Date/Time; or Schedule a Time, Date, or Date and Time Range. The available fields depend on the setup by your agency for the inspection type.

The **Schedule Cutoff Time** setting in the agency options for inspections will affect the public user's ability to enter Preferred or Ready-by Dates or the dates that are available to be selected when the scheduling method is *Schedule*. When the cut-off time has passed, the public user won't see today as an option in the fields where they enter a preferred date or ready-by date, or select a date or date and time.

**Note:** When public users with application access schedule inspections, they can only select dates within the scheduling period set up by your agency in the agency-level inspection options. For example, applicants will see available times for selection or may input preferred or ready-by dates only within this window. For more information, see [Setting Up Agency-Level Options for Permits](#) and [Setting Up Agency-Level Options for Business Licenses](#).

Only inspections supervisors can see the inspector names and override availability.

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

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

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

After you select a time and submit the request, the **Reschedule** option is available in the **Actions** menu for the inspection to select a different time.

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

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

## Adding Reference Entities to Inspections

The **Reference Entity** option is only available if the permit has been linked to reference entities.

Depending on agency setup of reference entities to include inspection details and permit types to link reference entities on permit applications, agency staff, applicants, and contacts with application access can select entities when scheduling an inspection to be more specific about what should be inspected. For more information about setting up reference entities, see [Reference Entity Overview](#).

For each reference entity that you select, you can further refine the reference entity inspection details that will be part of the inspection by clicking the pencil icon for the reference entity. On the reference entity details drawer, you can select reference entity attributes. For example, if a reference entity is a building that has 5 floors, specific floors such as floors 1 and 2 can be selected to be inspected. You can select multiple reference entities for the inspection.

## Working with Pending Inspections

Pending inspections can be manually created by agency staff by turning on the **Pending** switch to set the status of the selected inspection to *Pending*. They can also be automatically created for an application type, depending on agency-level setup.

The **Pending** option is available only if the **Enable Creation of Pending Inspections** switch is turned on for the agency. This switch isn't available for registered public users.

Inspections are also moved to a pending status when an inspection is postponed or indefinitely put on hold. Registered public users can only postpone inspections if allowed by the agency. See also *Rescheduling, Postponing, and Canceling Inspections*.

A registered public user can request a time for an inspection only when these conditions are met:

- The inspection status is Pending.
- The application status for a permit is Inspection, About to Expire, or Permit Issued; or the application status for a business license is Inspection.

For more information about setting up pending options for an agency, see *Setting Up Agency-Level Options for Permits*.

### Related Topics

- [Managing Inspections for a Permit](#)

## Rescheduling, Postponing, and Canceling Inspections

Agency staff and applicants can reschedule, postpone, or cancel an inspection, depending on the inspection type setup and agency settings for public users. This topic discusses rescheduling, postponing, or canceling a permit inspection displayed in the Redwood Experience.

Agency staff can always cancel inspections and postpone scheduled or requested inspections, but registered public users can only postpone or cancel inspections based on the agency-level options for permits and business licenses. Agency staff and registered public users can modify an inspection in the Redwood Experience on the Inspections page in the permit details. For more information about updating inspections in the Redwood Experience, see *Reviewing Inspection Details*.

**Note:** Applicants and contacts with application access can't reschedule, postpone, or cancel an inspection once the scheduled inspection is within the number of hours defined in the **Schedule Change Policy** field for the inspection type. For more information about schedule change policies, see *Setting Up Inspection Types*.

This table provides details about when you can cancel, postpone, and reschedule inspections, based on the inspection status. Details are provided in the surrounding text.

Inspection Status	Actions
<i>Pending</i>	<b>Cancel Inspection</b>
<i>Requested</i>	<b>Postpone</b>

Inspection Status	Actions
	<b>Cancel Inspection</b>
<i>Scheduled</i>	<b>Reschedule</b> <b>Postpone</b> <b>Cancel Inspection</b>
<i>Completed or Canceled</i>	No available actions for permit inspections.  <b>Note:</b> When the inspection status is <i>Completed</i> or <i>Canceled</i> , you can still add an inspection to the Origination activity of a business license application due to recurring inspections.

## Rescheduling an Inspection

Agency staff and registered public users can select the **Reschedule** option in the **Actions** menu or in the inspection details to remove inspections from the schedule and request or select a different time or date, depending on the scheduling method for the inspection type.

The **Reschedule** option opens the drawer where you can make your selections. For inspections configured with the *Ready* scheduling method, you enter a new date and time when the work is ready to be inspected. For inspections configured with the *Request* scheduling method, you enter a new preferred date and time. Depending on your agency's setup, you may only be required to enter a date. Agency staff with permissions can click the **Override** button to override inspector availability on the schedule.

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

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

## Postponing an Inspection

Select the **Postpone** option in the **Actions** menu or in the inspection details to take an inspection off the schedule. This action moves the inspection into the *Pending* status. You can postpone inspections that have been requested or a scheduled status when you want to wait to schedule the inspection. Agency staff can always postpone inspections, but registered public users can only postpone or cancel inspections based on the **Schedule Change Policy** for the inspection type.

## Canceling an Inspection

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

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

The **Cancel Inspection** action isn't available for inspections with a status of *Canceled* or *Completed*.

1. Agency staff can select the **Cancel Inspection** option in the 3-dot **Actions** menu for the inspection. Agency staff and users with access can open the inspection details and click the **Cancel Inspection** button.
2. Enter a **Cancellation Reason** on the Cancel Inspection drawer. Your agency may require comments, depending on settings in the agency options.
3. Click **Confirm**.

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

## Working with Inspection Dependencies

Agency staff can view and update inspection dependencies for permits on the Inspections page in the permit details. The dependencies diagram displays the required inspection types for the permit as well as inspections that have prerequisites.

Agency setup is required to establish the default inspection dependencies for a permit type and between linked permits. The default inspection dependencies within a permit come from the Inspection Group setup for the permit type. The global Inspection Dependencies setup page enables agencies to configure default inspection prerequisites that apply across all of an agency's inspection types. For more information about setting up dependencies, see [Setting Up Inspection Dependencies](#) and [Setting Up Inspection Groups](#).

When a permit is linked to other permits, and the permit is canceled, withdrawn, denied, or unlinked from the other permits, the inspection dependencies between the permits no longer apply. Agency staff, applicants, and contacts with permit access can click the **View Subapplications** link on the Inspections page in the permit details to manage linked permits. See [Working with Linked Permits](#).

**Note:** Agency staff can override dependencies when scheduling an inspection. For more information, see [Requesting and Scheduling Inspections](#).

Here's how agency staff can work with the inspection dependencies in the permit details on the drawers to Update Dependencies View Dependencies:

### Updating Inspection Dependencies for a Permit

On the Inspections page for a permit, click the **Update Dependencies** button.

The Update Dependencies drawer lists all of the inspection types associated with the permit and linked applications, if any, including whether the inspection type is required or final. If the inspection type was set up as a final inspection in an inspection group, it's required.

This is the information available for each inspection type available to select as a prerequisite inspection type.

Page Element	Description
<b>Application</b> and <b>Application Type</b>	Displays the application number and permit type associated with the inspection type.
<b>Description</b>	Displays the description of the permit.
<b>Inspection Type</b>	Displays the inspection type for which you can update the prerequisite inspections.
<b>Required</b>	Indicates whether the inspection type was set up to be required. Agency staff can change this setting when scheduling inspections, except for final inspections.

Here's how to make updates to add or remove dependencies:

1. Expand the row for an inspection type in the inspection group.
2. Select or deselect the checkbox for an inspection type in the list to add or remove prerequisite inspections.

The default prerequisite inspection types defined by the agency are selected until you deselect the checkbox for the inspection type.

3. Click **Save**.

## Viewing Inspection Dependencies

On the Inspections page for a permit or on the Update Dependencies drawer, click the **View Dependencies** button.

The Dependencies drawer displays a graphical representation of the inspections that have prerequisites as well as required inspection types for a permit. You can search by application name, application ID, or inspection name.

Let's take look at the information that the dependencies diagram provides:

- Prerequisite inspections for primary and linked permits appear to the left of the next inspections. The sequence ends on the right with the final inspection.

Agency staff can override warnings to complete prerequisite inspections before scheduling the next inspections.

- Any inspection marked as required in the inspection group appears with an arrow pointing to the inspection group's final inspection.

All required inspections must be complete before a final inspection can be created, without exception. There isn't any sequence enforced as there is for prerequisite inspections.

- The node for each prerequisite or required inspection type includes the inspection type, application number, and permit type. An inspection status appears if the inspection has been created as well as *Prerequisite* and *Required* notation.
- The nodes may appear in different colors depending on the stage in the process of completing the inspections for an application. Some colors indicate inspection status – for example, white is requested or no inspection yet and blue is scheduled. Other colors indicate the inspection result, such as green for passed or corrected and red for failed.

### Related Topics

- [Managing Inspections for a Permit](#)
- [Requesting and Scheduling Inspections](#)

## Assigning Inspections

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

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

For more information about assigning inspections from the agency Inspections list page, see [Managing Inspections for an Agency](#). For more information about assigning inspections in the application details, see [Managing Inspections for a Permit](#) and [Managing Inspections for a Business License Application](#).

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

## Inspection Assignment Considerations

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

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

Your agency may also limit the number of daily inspections based on a count of inspections that are scheduled using a date only. The **Inspection Count Limit** field is the agency setting used to alert inspection supervisors when an inspector's total permit and business license inspections for the day exceeds the maximum defined. All of the inspections assigned to an inspector that aren't in a canceled or completed status are tallied. Inspectors below the limit can be assigned using automatic assignment, however, inspector supervisors can override the maximum number when manually assigning inspections. You must have an inspection supervisor job role to see inspector names and counts when scheduling inspections; an alert icon appears next to the count on the schedule page when an inspector has reached the daily limit. For more information, see [Setting Up Inspection Assignment](#) and information about using batch inspection assignment in this topic.

For more considerations about requesting or scheduling inspections, see [Requesting and Scheduling Inspections](#).

## Assigning an Inspection

For permits and business licenses displayed using the Redwood Experience, the **Assign** or **Reassign** action appears as a link or option in the Actions menu for an inspection. The information provided is consistent across the different inspection interfaces.

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

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

- The Assign or Reassign drawer, respectively, displays inspectors with availability based on the **From Date**. The default **From Date** depends on the inspection status, or you can select a date.

Drawer	Status	From Date Default Value
Assign	Requested	The ready-by date when it is after the current date, or the current date when the ready-by date is on or before the current date.
Reassign	Scheduled	The current date.

- Select an inspector in the list.

- Inspector name
- Date and time

Depending on the time entry method set up for the inspection scheduling method, you may only be able to select a date or a date and time range.

- Preferred

For an inspection that has been configured to use the count assignment method, an icon (not shown here) will be displayed next to the **Count** value for an inspector who has reached the limit. Only inspector supervisors can see the inspector name and count information.

- Click the **Select a Time** pencil icon button for an inspector to select a date or date and time for the selected inspector.
- Click **Done** to save your assignment, or click the **Override Availability** button to select an inspector and date or date and time that's not available for selection on the drawer.

On the Override Availability modal page, select the **Inspector** from the drop-down list, **Date**, and **Time**, and click **Done** to assign the inspection.

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

## Assigning Inspections in Batch

As an inspector supervisor, you can assign or reassign inspections in a batch from the agency Inspections list page when the inspections are ready to be assigned. You have the option to override inspection dependencies and limitations based on the maximum inspection count for inspectors. You can also exclude inspectors from the automatic assignment. The batch assignment process assigns inspections based on:

- Holiday schedules
- Inspection calendars
- Inspector availability
- Inspector qualifications
- Work schedules

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

Here's how to use the batch inspection assignment on the agency Inspections list page:

1. Click the **Assign Multiple** button.
2. Select the checkbox next to each inspection that you want to automatically assign.
3. Click **Assign**.
4. On the Assign drawer, you can modify these criteria:
  - o Select individual inspectors to exclude them from the assignment pool.
  - o Turn on the **Exclude District** switch to remove the inspection district from the assignment matching criteria.
  - o Turn on the **Exceed count limit** switch to assign to inspectors who have already reached their assigned inspection limit.
5. Click **Done** to run the assignment process.

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

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

## Viewing Assigned Inspections

Inspectors and inspection supervisors can view details about inspections, including inspection assignments, on pages they access from their laptops or desktops. They can also view the inspections assigned to them in the Inspector Application for mobile devices. Inspection supervisors view inspections for the inspection types and districts they are responsible for using the Inspector Application.

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

## Viewing Assigned Inspections

Agency staff including inspectors and inspection supervisors can view assignments on the agency's Inspections list page. For more information, see [Managing Inspections for an Agency](#).

Here's how to find assignments:

1. Open the Inspections page from the Permitting and Licensing home page.
2. You can look in the **Inspector** column or enter the assigned inspector's name in the **Search** field to filter the inspections currently displayed depending on the other filters that are applied. Once you enter the first name, you may be able to select the inspector's name from the drop-down list.
3. In the **Actions** column for the inspection, you can select the **View Detail** option to open the inspection details.
4. You can also go to the Inspections page in the application details to review inspection information.

## Viewing the Daily Schedule for Inspections in the Inspector Application

The Inspection Tasks page provides a daily calendar view with inspections organized by scheduled date and time or date only, depending on agency configuration of the scheduling methods. Overdue inspections from previous days appear at the top of the list.

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

## Reviewing Inspection Details

You keep track of the details for an inspection, including the inspection location, schedule, results, and contact information, on the inspection pages in the permit application details.

Agency staff, applicants, and others with application access can view and manage inspection details for inspections associated with a permit through the Inspections page.

The inspection details are organized into four tabs:

- **Details**
- **Attachments**
- **Comments**
- **Time Recording**

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

Here's how to navigate to an inspection's details through the permit:

1. In the left navigation panel of the permit application, expand the **Progress** section.
2. Click **Inspections** in the left navigation panel to open the list of inspections in the right panel.
3. Click the inspection row, or the three-dot **Actions** menu in an inspection row and select **View Details**.

This is what the details page looks like for a scheduled inspection:

First of two screenshots that display the inspection details page in the Redwood Experience

The screenshot displays the Oracle Public Sector Permitting and Licensing interface. At the top, the Oracle logo is on the left, and navigation icons (home, notifications, user profile) are on the right. The main header area shows the permit title "405 Ext. Lath/Siding" with a "Scheduled" status tag, the ID "BLDG-INSP-2024-00032", and buttons for "Cancel" and "Submit". Below the header, it states "Created manually by Martha Paxton on 8/19/24 - Last updated by sam.cook on 8/28/24".

A modal window is open, showing the "Details" tab. The modal has a navigation bar with "Details", "Attachments", "Comments", and "Time Recording". The "Details" section includes a "Required" toggle switch, "Application ID" (RESADD-2024-00029), "Application Type" (Residential Addition Construction), "Conditions" (2 conditions - Notice), and "Description" (Residential Addition Construction). The "Schedule" section lists "Schedule Date" (Wednesday, August 28, 2024), "Inspector Arrival" (Wednesday, August 28, 2024), "Inspector" (Martha Paxton), and "Preferred Date" (Tuesday, August 20, 2024). At the bottom of the modal are three buttons: "Reschedule", "Postpone", and "Cancel Inspection".

Second of two screenshots that display the inspection details page in the Redwood Experience

The screenshot displays a form titled "Request" with the following fields and values:

- Address:** 1 ARGUS CT, ALAMEDA, CA 94502
- Inspection Location:** (Empty)
- Comments:** (Empty)
- Location Contact:** Abby Scott
- Preferred Contact Method:** Email
- Phone:** (Empty)
- Country:** US
- Mobile Phone:** (Empty)
- Email:** abby.scott@oracle.com

A "Select from List" button is visible next to the Location Contact field.

This information appears at the top of the page:

- Inspection number and type
- Timestamps for the users who created and last updated the inspection

- The **View Summary Report** button

Click to generate a report of the inspection summary. Available to agency staff and registered public users for completed and canceled inspections, and to agency staff only for scheduled inspections.

## Inspection Details - Details Tab

Here's the information on the **Details** tab of open inspections:

Page Elements	Description
<b>Required</b>	<p>Turn on this switch to indicate that this inspection type is required to complete the application. Only agency staff can change whether an inspection is required.</p> <p>The <b>Required</b> switch defaults to the inspection type settings on the Inspection Group Details page, but you can override it. If the inspection is not part of the inspection group, the setting defaults to not required.</p>
<b>Application ID, Application Type, and Description</b>	<p>Displays the permit number, permit type, and permit description that this inspection is for.</p> <p>Click the number link to open the permit application details. See <a href="#">Viewing the Permit Overview</a>.</p>
<b>Conditions</b>	<p>If applicable, displays the number of application conditions as a link and the condition with the highest severity, such as <i>Lock</i>, <i>Hold</i>, or <i>Notice</i>. Click the link to view the condition summary.</p>
<b>Schedule</b> section	<p>Review information about the inspection schedule. Fields depend on how the agency has set up inspections.</p> <ul style="list-style-type: none"> <li>• <b>Preferred Date</b> or <b>Preferred Date</b> and <b>Preferred Time</b> - Appears for inspections set up with the <i>Request</i> scheduling method.</li> <li>• <b>Ready-by Date</b> or <b>Ready-by Date</b> and <b>Ready-by Time</b> - Appears for inspections setup up with the <i>Ready</i> scheduling method.</li> <li>• <b>Schedule Date</b> or <b>Schedule Date</b> and <b>Schedule Time</b> - Appears to agency staff only for inspections set up with the <i>Schedule</i> scheduling method and after inspections with any scheduling method have been scheduled. The inspection date or inspection date and time is the actual time the inspection is scheduled for. Public users will only see the inspector arrival information.</li> <li>• <b>Inspector</b> - Once the inspector has been assigned, the inspector name appears and is displayed only to agency staff.</li> <li>• <b>Inspector Arrival</b> - Agency staff see both the actual date or date and time that the inspector is scheduled for the inspection as well as the inspector arrival date, date and time, or timeframe. The applicant or contacts with application access see only a date or timeframe, depending on the agency-level settings for permit and business license inspections.</li> <li>• The cancellation reason for inspections with a <i>Canceled</i> status.</li> </ul> <p>For more information, see the inspection options in <a href="#">Setting Up Agency-Level Options for Permits</a> and <a href="#">Setting Up Agency-Level Options for Business Licenses</a>.</p> <p>For more information about inspection schedules, see <a href="#">Requesting and Scheduling Inspections</a>.</p>
<b>Request</b> section	<p>Review the address, inspection location, location contact, preferred contact method, and contact information. Any comments added by the requester during scheduling also appear in this section.</p> <p>You can update the location contact by clicking the <b>Select from List</b> button.</p>

After an inspection is completed, you can see these sections:

Page Element	Description
<b>Result</b> section	Review the inspection results, rating, score, and number of major violations after the inspector has resulted the inspection.  For more information about results, see <a href="#">Viewing Inspection Results</a> .
<b>Signature</b> section	View the signatures added when the inspection is complete in the Inspector Application. Signatures are required depending on the inspection setup.

## Inspection Details - Attachments Tab

Here's what you can do on the **Attachments** tab in the inspection details:

- **Add** - In the **Attachments** area, drag the file that you want to attach from your local directory into the **Drag and Drop** field. Or click anywhere in this field, locate and upload the file.
- **Search** - Enter text in the **Search** field to find matching attachments.
- **View details** - Click the attachment row in the grid or click the 3-dot actions button and select the **View Details** option.
- **Preview** - Click the attachment filename link or click the 3-dot actions button and select the **Preview** option.
- **Download** - Click the 3-dot actions button for the attachment and select the **Download** option to download a file and save locally.

**Note:** Public users can't add or delete these attachments.

For more information about inspection documents displayed in the Redwood Experience, see [Viewing Inspection Documents](#).

## Inspection Details - Comments Tab

Here's what you can do on the **Comments** tab in the inspection details:

- **Add** - Click the **Add Comment** button to open the **Add comment** drawer. On the drawer, you can make the comment private for agency staff viewing only, add a new comment, or select a favorite or standard comment.
- **View details** - Click the comment row in the grid to open the **Comment details** drawer. On the drawer, depending on your permissions for the comment, you can modify or delete the comment.

**Note:** Public users can't add or delete comments.

## Inspection Details - Time Recording Tab

Here's what you can do on the **Time Recording** tab in the inspection details:

- **Add** - Click the **Add Time** button to open the **New time** drawer. On the drawer, you can enter information about the new time entry. For more information, see [Reporting Inspection Time](#).

- View details - Click the time entry row in the grid to open the **Time details** drawer. On the drawer, depending on your permissions for the time entry, you can modify or delete the time entry. For more information, see *Viewing Recorded Time for an Application*.

**Note:** The **Time Recording** tab isn't displayed for public users.

## Viewing Inspection Documents

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

You can see the inspection documents as attachments on two pages in the permit application details:

- On the Attachments page, click the Inspection tab.
- In the inspection details, click the Attachments tab.

Here's how to work with inspection documents accessed through the inspection details:

1. Click **Inspections** in the left navigation panel to open the list of inspections in the right panel.
2. Click the inspection row in the table or click the three-dot **Actions** menu in an inspection row and select **View Details**.
3. On the inspection details page, click the **Attachments** tab.
4. Here's the information you can review in the list of inspection documents:

Page Element	Description
File name with file type extension	Click the file name link to open a preview of the attachment.
File description	View the description of the attachment as entered by the person who uploaded the attachment.
File information	View the file information in the column, including: <ul style="list-style-type: none"> <li>○ <i>Uploaded by &lt;Name&gt; on &lt;Date&gt; timestamp. For example, <i>Uploaded by John Doe on 1/22/25 5:19 PM.</i></i></li> <li>○ File size. For example, <i>5.63 MB.</i></li> </ul>
Source	View the level at which the document was added. In the Inspector Application, inspectors can add documents at the inspections level, at the checklist level, and at the checklist item level.
Reference	View the checklist name and checklist item name associated with the document, if applicable.
Actions	Click the three-dot actions icon to select and perform an action: <ul style="list-style-type: none"> <li>○ <i>View Details</i> - Open the attachment details drawer to view the attachment details.</li> </ul>

Page Element	Description
	<p>You can update the description or delete the file, depending on your permissions.</p> <ul style="list-style-type: none"> <li>○ <i>Download</i> - Click to save the document to your computer.</li> <li>○ <i>Preview</i> - Click to open a preview of the file.</li> <li>○ <i>Delete</i> - Click to delete the file. This option is only available if you have permissions to delete.</li> </ul>

5. To upload a new document, drag the file that you want to attach from your local directory into the **Drag and Drop** field. Or click anywhere in this field, locate and upload the file.
6. To find a specific attachment, you can enter values in the **Search** field.

## Viewing Inspection Results

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

The agency can setup up inspections to use manual scoring or automatic score calculation with the bottom-up scoring method. Scoring bottom to top indicates that the inspector starts with a zero (0) score and adds points for each criterion that is met. The higher the score, the better the results.

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

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

- Overview page
- Inspections list page
- Inspection detail page

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

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

Page Element	Description
<b>Major Violation</b>	Identify the number of major violations on the inspection.

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

*Related Topics*

- [Inspection Evaluation Overview](#)

# 12 Using the Inspector Application

## Security Details for Using the Inspector Application

This topic describes important security roles, requirements, or considerations specific to using the Inspector Application for mobile devices.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Building Inspector	Performs building inspections for permit applications using the Inspector Application for mobile devices.	PSC Building Inspector PSC Permits Application Administrator PSC System Administrator
PSC Business License Inspector	Performs inspections for business license applications using the Inspector Application for mobile devices.	PSC Business License Inspector PSC Business License Inspection Supervisor PSC Chief Building Officer
PSC Business License Inspection Supervisor	Manages the workflow and inspectors to get through building inspection jobs for business license applications every day. Keeps track of inspectors, districts, and workload.	PSC Business License Inspection Supervisor
PSC Inspections Supervisor	Manages the workflow and building inspectors to get through building inspection jobs for permit applications every day. Keeps track of inspectors, districts, and workload.	PSC Inspections Supervisor PSC Permits Application Administrator PSC System Administrator

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

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

## Performing Inspections on the Inspector Application

Use the Inspector Application to perform inspections in the field for permits and licenses. Inspectors and inspection supervisors can access inspection tasks, review inspection details, complete checklists, add comments and attachments, and submit inspection results.

The Inspector Application provides government field staff the ability to evaluate building code and other regulatory compliance using productivity tools on a mobile device and is accessible through your agency's implementation of Oracle Permitting and Licensing.

The Inspector Application is displayed in the Redwood Experience. Users who previously used a retired inspection application are now redirected to the Inspector Application after signing in.

**Note:** The classic mobile inspection applications are now retired and are no longer available from the Apple App Store or Google Play Store. Use the Inspector Application for permit and license inspections and the Code Officer Application for code enforcement inspections.

For more information about using the Inspector Application in offline mode, see [Using Offline Mode for Inspections](#).

## Viewing Inspection Tasks

Assigned inspections for the day as well as overdue tasks appear in a list on the home page when you open the Inspector Application for permit and license inspections. From the Inspection Tasks page, you can manage and perform inspections.

This example on a laptop illustrates an inspector or inspector supervisor's view of the Inspection Tasks home page containing the fields described in the surrounding text. The filters show scheduled inspections including overdue inspections for the date in the scheduled date filter, assigned to the selected inspector. The overdue inspections appear at the top of the list. The property map displays the location of the selected inspection in the right pane.

ORACLE
🏠

### Inspection Tasks

Q
Schedule date 2024-12-12 ✕
Inspector Martha Paxton ✕
Status Scheduled including overdue ✕

**1 of 8 selected** Result Multiple

**103 Piers**  
8/20/24  
Inspector: Martha Paxton  
3026 GIBBONS DR, ALAMEDA  
STBlitzALICCA - 82 Overdue

---

**104 Footings**  
8/22/24  
Inspector: Martha Paxton  
3026 GIBBONS DR, ALAMEDA  
STBlitzALICCA - 82 Overdue

---

**Insulation Inspection - (Wall & Ceiling)**  
8/26/24  
Inspector: Martha Paxton  
1 ARGUS CT, ALAMEDA  
Permit Application - BP-2024-0043  
4 conditions - Notice Overdue

**Passing Result**  
Score: 80 - Rating: B  
Major Violations: 1

---

**405 Ext. Lath/Siding**  
8/28/24  
Inspector: Martha Paxton  
1 ARGUS CT, ALAMEDA  
Residential Addition Construction - RESADD-2024-00029  
2 conditions - Notice Overdue

---

**106 Slab Garage**  
8/28/24  
Inspector: Martha Paxton Overdue

Sort By ▾

Bureau of Land Management, Esri, HERE, Garmin, INCREMENT P, USGS, EPA, USDA  
Powered by Esri

On the Inspection Tasks home page in the Inspector Application for mobile devices, inspectors can:

- View the daily job list for inspections assigned to them in a list or map.
- View inspection type, property address, permit type, permit number, and permit status for each permit inspection.
- View inspection type, business address, business license transaction type, and business license transaction number for each business license inspection.
- View the inspection status and results for completed inspections.
- View or hide overdue inspections that were incomplete as of the scheduled day.
- Identify inspections with conditions or restrictions.
- Identify reinspections.
- Access inspection details and checklists for performing the inspection.
- Select multiple inspections to provide results.
- Rearrange the list using the drag-and-drop handle on each inspection row.

Depending on your agency's setup, you can also show inspection routing on the map to help determine streamlined travel paths between the day's inspection tasks. For more information, see [Working with Inspection Routing](#).

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

Each inspection in the task list includes this information in the left panel:

Inspection Information	Description
Inspection type	Click the inspection type link to access the full inspection, including the overview, checklists, comments, attachments, signatures, and time records, which appear on separate panels.
Date or date and time	Displays the scheduled time of the inspection, which displays the date only or the date and time, depending on agency setup for the scheduling method.  Overdue inspections display the date only.
Inspector name	Displays the assigned inspector's name.
<b>Reinspection</b>	Identifies the inspection that was created to redo the previous inspection of the same type that failed. You can access the inspection history from the inspection details.
Status or <b>Overdue</b> badge	Displays the inspection status in a badge. For example, <i>Scheduled</i> , <i>Canceled</i> , or <i>Completed</i> .  <i>Overdue</i> indicates that the inspection was not completed on the scheduled day.
Permit property location or business location	Displays the address of the property or business.
Permit or business license transaction information	Displays the permit type and permit number or business license type and business license transaction number associated with the inspection.

Inspection Information	Description
Business's doing business as (DBA) name	Displays the business's doing business as (DBA) name for license inspections.
Inspection result	Displays the inspection result, such as <i>Pass</i> . If the inspection is set up to use the bottom up scoring method, the result may include Score, Major Violations for failing results, and Rating information.

A map showing the properties appears on the right side of the page when viewed on a desktop or laptop computer. The Inspection Tasks page zooms to the location of the inspection on the map when you select the row of the inspection task in the list. Map markers with a number show the number of inspections at that location. On a mobile device, click the **View Map** button to display the property map above the list of inspections. Click **Hide Map** to close the map.

You can begin the process of providing results for a group of inspections that you select from the list of inspections by clicking the **Result Multiple** button.

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

## Viewing Inspection Tasks

You can use the search filters and sorting options to adjust the list of inspection tasks.

By default, the inspection tasks list is filtered to display all the scheduled inspections assigned to the logged in user as of the current date.

You can remove the filter chips except for the date filter by clicking **Remove** (the **X** icon) on the chip. Click the filter chip below the search bar to add it to the search bar again. The values you see in each filter chip in the search bar appear in the inspections list.

- **Schedule date** filter - Click the filter name to either enter a date or use the calendar button to select a date on the monthly calendar. This filter provides access to the inspections scheduled for a specific date. You can't remove this filter.
- **Inspector** filter - Click the filter name to display a list of assigned inspectors. Select the inspector name to view the inspections assigned to that inspector in the list of inspection tasks. Remove the filter to view the inspections assigned to other inspectors. You can see the inspections that you are authorized to view.
- **Status** filter - Click the filter name to display a list of inspection statuses, including *Canceled*, *Completed*, *Overdue*, *Scheduled excluding overdue* and *Scheduled including overdue*. The default value is *Scheduled including overdue*. Select a status to view the inspections with that status. Remove the filter to view the inspections with any of those statuses. The *Overdue* status appears as a badge on the inspection in the list.

You can also sort by fields in inspections displayed in the list. Click the **Sort By** button to sort alphanumerically by one of these inspection fields:

- *Schedule Start Date, Old to New*
- *Schedule Start Date, New to Old*
- *Address*
- *Status*
- *Inspection Type, Ascending*
- *Inspection Type, Descending*

- *Result*
- *Business*

## Working with Overdue Inspections

Permit or business license inspections that are not completed on the scheduled day appear with an **Overdue** badge and appear at the top of the inspections task list starting the next day. You can use the status filter to view or hide overdue inspections.

Overdue inspections are calculated based on the date selected in the search bar date filter. Any incomplete inspections scheduled for previous dates are overdue. If the date filter is set to the date the inspection was originally scheduled for, it won't appear as overdue.

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

## Working with Inspection Routing

The Inspector Application for mobile inspections provides routes between inspections on the map with the current day's tasks.

Oracle Permitting and Zoning provides mapping and route optimization by integrating with the ESRI routing service, to help inspectors streamline their travel between inspection tasks. For more information about setting up routing on the inspection map, see [Setting Up Map Routing](#).

This example illustrates the routing on a map when the inspector selects the option to show the route. The route calculations are based on the inspector's current location and, in this example, are shown in miles as set up by the agency.

# Inspection Tasks

Q Schedule date 2/26/25 X Inspector Roger Penrose X Status Scheduled including overdue X alameda X Search

Result Multiple

Default

Sort By v

4 items

Overdue

TSQA Description

1/22/25

Inspector: Roger Penrose

SHORELINE DR, ALAMEDA

TSQAPermit · 14

Overdue

TSQA Description

1/22/25

Inspector: Roger Penrose

OTIS DR, ALAMEDA

TSQAPermit · 14

Overdue

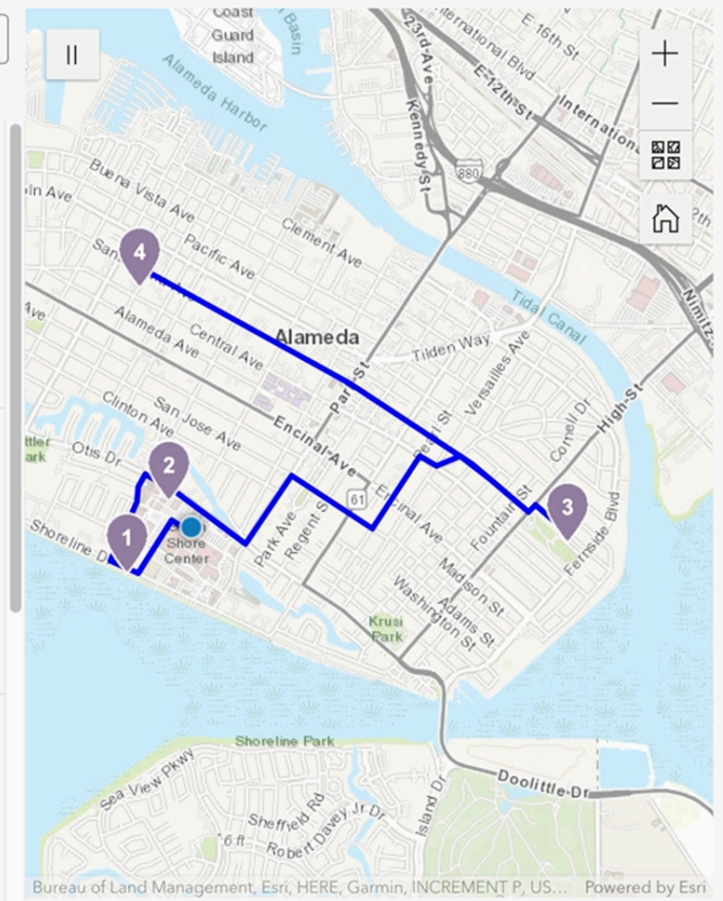
MBL\_INSTYPE\_2 Description

2/17/25



Inspector: Roger Penrose

WHITEHALL PL, ALAMEDA

CKPERMITTYPE11 · ZPER-FEN-2025-09110



The inspector can use the handle for an inspection to drag and drop it in a different order in the list. When you select the option to show the route, the inspection route is displayed on the map.

Page Element	Description
	Use the drag-and-drop handle for the inspection entry to reorder the list of inspections. The inspection order is maintained in the list on the inspector's device.
<b>Route</b>	Select from these options: <ul style="list-style-type: none"> <li>• <b>Show</b> - Displays the inspection route on the map in the order specified in the current day's inspections list. Depending on your agency's setup, the distance is shown in miles or kilometers.</li> <li>• <b>Hide</b> - Turns off the inspection routing on the map.</li> <li>• <b>Optimize</b> - Determines a shorter route based on the ESRI key. The time and distance savings are displayed in a message.</li> </ul>
	Click the inspection pin on the task list to send the location of the inspection and inspector's device to a navigation application, such as Google Maps or Apple Maps. The navigation application then displays driving directions to the location of the inspection.

## Managing Scheduled Inspections

In the Inspector Application, inspector supervisors and building or business license inspectors can add inspections for a permit or business license application as well as update and cancel scheduled inspections.

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

You can manage inspections in the Inspector Application regardless of the schedule change policy and scheduling cut-off times defined by your agency for public users. You can also manage inspections on a desktop from the application details, and from the agency-level Inspections console page if you are an inspections supervisor.

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

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

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

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

## Adding an Inspection in the Inspector Application

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

Here's how to add an inspection:

1. Click the inspection type link for an inspection on the Inspection Tasks page.

The inspection can have a *Scheduled*, *Completed*, or *Canceled* status.

2. Click the three-dot **Actions** menu button on the inspection overview panel.
3. Click the **Add Inspection** link.

The Add inspection drawer opens, displaying the same application information, including number, type, and applicant, as for the original inspection.

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

4. Turn on the **Pending** switch if this is a placeholder inspection. This switch is only available if set up by your agency. Pending inspections won't show up in the Inspector Application. You can create a pending inspection even if conditions have been applied to the permit or business license.
5. Click the **All** button to view all of the agency's available inspection types. You can select any inspection type, including those that aren't in the inspection group for the permit type.

You have the option to search the available inspection types.

6. Click the **Inspection Group** button to view only the inspection types in the inspection group assigned by the agency to the application type.
7. Select an inspection type.
8. Click **Continue**.
9. You have the option to turn on the **Required** or **Pending** switches to make the inspection required or pending, respectively. Turn off the **Pending** switch if you want to schedule the inspection.
10. Enter values in the date and time fields.

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

When you add a pending inspection, the assignment switch as well as the date and time fields aren't available.

11. In the **Request** section, you can update or add information, including the address, inspection location, comments, and the location contact with their contact details. This is optional.
12. Click **Save**.

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

## Viewing or Updating an Inspection Schedule in the Inspector Application

Agency staff can update an inspection, regardless of the schedule change policy and scheduled cutoff time; these restrictions only apply to public users. If the inspection has a *Canceled* or *Completed* status, you can still view the schedule details.

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

1. Click the inspection type link for an inspection on the Inspection Tasks page.  
You can only update inspections with a *Scheduled* status.
2. Click the **Edit** button on the inspection overview panel.
3. The inspection information is displayed on these tabs:
  - o **Details**
  - o **Attachments**
  - o **Comments**
  - o **Time Recording**
4. On the **Details** tab, you can review and update these inspection details for inspections assigned to you or as an inspector supervisor:

Page Element	Description
<b>Required</b>	The switch to indicate whether an inspection is required.
<b>Application ID</b> and <b>Application Type</b>	Displays the application number and type. Click the application number to go to the application details.
<b>Conditions</b>	Displays the number of conditions and the severity of the most severe condition. For example, Notice, Hold, or Lock.
<b>Description</b>	Displays the application description.

5. The **Schedule** section displays the inspection schedule information, based on the setup for the inspection type. Here's how you can manage the schedule:

Page Element	Description
<b>Assign to me</b>	Turn on this switch to claim another inspector's inspection, if the inspection is eligible be claimed.
<b>Schedule Date</b> and <b>Schedule Time</b>	Update the date and time. You may see a date and time, date only, or time range, depending on agency setup.
<b>Inspector</b> and <b>Inspector Arrival</b>	Displays the assigned inspector and the schedule based on the values in the schedule fields.

Page Element	Description
<b>Reschedule</b>	<p>Click this button to open the <b>Reschedule</b> drawer, where you can reassign the inspection to another eligible inspector, based on their availability after a selected date.</p> <p>This drawer displays scheduling fields based on the scheduling method assigned to the inspection type by the agency. You may be required to enter a preferred date and time or preferred date; a ready-by date and time or ready-by date; or a list of dates and times, time ranges, or dates to choose from.</p> <p>If scheduling method is Schedule, you can see inspector availability. In the <b>From Date</b> field, use the <b>Select Date</b> button or enter a different date to display inspectors available after that date. Each inspector appears with the date and time they're available and this information:</p> <ul style="list-style-type: none"> <li>○ <b>Edit</b> - Click the button to select a different time for the selected inspector.</li> <li>○ <b>Preferred</b> - Identifies an inspector who has been requested for this type of inspection.</li> </ul> <p>Click the <b>Override Availability</b> button to pick any inspector, date, and time without restrictions.</p> <p>Click <b>Done</b> to close the drawer.</p>
<b>Postpone</b>	Click this button to take this inspection off the schedule. You can schedule it later from the inspection list on a desktop.
<b>Cancel Inspection</b>	Click this button to enter a cancellation reason and confirm that you want to permanently remove this inspection.

6. The **Request** section provides further details regarding the inspection request. You can review and update this information:

Page Element	Description
<b>Address</b>	Displays the address of the inspection.
<b>Inspection Location</b>	Enter a description of where the inspection takes place, such as the kitchen.
<b>Comments</b>	Enter inspection-level comments.
<b>Location Contact</b> and contact information	<p>Enter a location contact or click the <b>Select from List</b> button to select a location contact from a list of contacts.</p> <p>You can also enter or update the contact information for the location contact, including the preferred contact method, phone number, mobile phone number, and email.</p>

7. Click the **Attachments** tab to view inspection and checklist attachments that have been uploaded in the web application. You can view other attachments in the application detail pages.
8. Click the **Comments** tab to view or add comments.
9. Click the **Time Recording** tab to view or add time entries.
10. Click **Save**.

The updated inspection appears on the Inspection Tasks page unless you have postponed or canceled the inspection.

## Claiming an Inspection

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

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

Here's how to claim an inspection:

1. Click the inspection type link for an inspection on the Inspection Tasks page.
2. Click the three-dot **Actions** menu button on the inspection overview panel.
3. Click the **Assign to me** link.
4. Click **Assign**.
5. You can also claim an inspection by clicking the edit button with the pencil icon on the inspection overview panel. The **Assign to me** option appears with the scheduling information on the Details tab in the inspection details. Click **Save**.

## Canceling an Inspection in the Inspector Application

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

Here's how to cancel an inspection.

1. Click the inspection type link for an inspection on the Inspection Tasks page.
2. Click the three-dot **Actions** menu button on the inspection overview panel.
3. Click the **Cancel Inspection** link.

You can also cancel an inspection by clicking the edit button with the pencil icon on the inspection overview panel. The **Cancel Inspection** button appears with the scheduling information on the Details tab in the inspection details.

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

The canceled status and any comments entered appear on the inspection details. The status also appears on the inspection on the Inspection Tasks page.

## Working with Inspection Details

In the Inspector Application for permit and license inspections featuring the Redwood Experience, you view the inspection overview panel, view inspection history for reinspections, and initiate actions for performing inspections on the inspection detail panels, including working with checklists, comments, attachments, signatures, and time recording.

Access the inspection overview and detail panels by clicking the inspection type link for an inspection on the Inspection Tasks page. In the inspection overview panel, you can:

- Review the inspection number, type, and its status.
- Access application details associated with the inspection.
- Review the description of the application.
- Locate the inspection site on a map.
- Review reference entities selected during inspection scheduling.
- Review inspection status, rating, score, and number of major violations of completed inspections.
- Identify reinspection information, including the date of the previous inspection and access to the inspection history.
- Identify whether the inspection is unannounced.
- Identify the inspector, location contact, and contact information.
- Read requester comments and special location instructions.
- Claim an inspection assigned to another inspector.
- Access the conditions applied to the application.
- Update your estimated time of arrival at the property.
- View and update, add, or cancel an inspection.
- View the cancellation reason for canceled inspections.
- Reschedule or postpone an inspection.


This example illustrates the inspection panels for a permit inspection containing the field values described in the surrounding text. The panels in the carousel include inspection overview information, checklists, comments, attachments, and signatures. The time recording panel appears after the signatures when you rotate the carousel.

Example of a permit inspection in the Inspector Application, described in the surrounding text

The screenshot displays the Oracle Inspector Application interface for a 'Solar Inspection'. The interface is divided into several sections:

- Header:** 'ORACLE' logo and 'MP' user icon.
- Navigation:** 'Inspection Tasks' with navigation arrows.
- Inspection Details (Left Panel):**
  - Solar Inspection:** INSP-2024-00008
  - Overview:** Buttons for '...', 'Result', and 'Overview'.
  - Inspection Location:** 1002 OTIS DR, ALAMEDA
  - Schedule:** 1/29/24 2:00 PM, Inspector Arrival 1:00 PM - 5:00 PM
  - Inspector:** Kaitlyn Haney
  - Location Contact:** Abby Scott
  - Permit:** Residential Plumbing, PLMB-2024-00005, 3 conditions • Hold
  - Notes:** Kitchen remodeling include moving the plumbing.
- Checklists:**
  - Electrical Inspection Checklist (3 checklist items)
  - Roof Inspection Checklist (4 checklist items)
  - Solar Inspection Checklist (5 checklist items)
- Comments:**
  - Additional comment: 2/2/24 12:11 PM, Last Updated By Kaitlyn Haney, Created By Kaitlyn Haney. Public.
  - Initial inspection is completed. May need to reschedule due to rain. 2/2/24 11:56 AM, Last Updated By Kaitlyn Haney, Created By Kaitlyn Haney. Public.
- Attachments:**
  - Drag and Drop: Select or drop files here.
  - front-corner additional wall.jpeg: Additional correction needed. Not critical. View more.
  - Fail Electrical Inspection.pdf: Issue corrected on site. View more.
- Signature:**
  - Inspector signature: Not signed. Required.
  - Contractor signature: Not signed.
  - Owner signature: John Smith, 2/2/24 11:58 AM.
- Bottom Navigation:** Checklists, Comments, Attachments.

You can view this information and take these actions on the inspection overview panel:

Page Element	Description
Inspection type, number, and status	View the inspection type, inspection number, and inspection status. The status badge can be <i>Scheduled</i> , <i>Canceled</i> , or <i>Completed</i> . An <i>Overdue</i> badge indicates that the inspection wasn't completed on the scheduled day.  Unannounced inspections are also identified.
	Click the <b>Actions</b> menu button in the inspection header information panel to perform these actions: <ul style="list-style-type: none"> <li>• <b>Add Inspection</b> – Add an inspection for the same application. This action is available on inspections with a <i>Scheduled</i> or <i>Canceled</i> status. When the application status is <i>Withdrawn</i> or <i>Completed</i>, you will no longer be able to add new inspections. You can, however, add inspections for business licenses in a <i>Completed</i> status.</li> <li>• <b>Assign to me</b> – Click to claim a scheduled inspection assigned to another inspector.                           This action is only available when the inspector who claims the inspection has the Building Inspector or Business License Inspector job function with district and inspection type attributes that match the inspection's district and type attributes.</li> <li>• <b>View or Apply Conditions</b> – Click to open the Conditions page. For more information, see <i>Working with Conditions</i> and <i>Working with Application Conditions</i>.</li> <li>• <b>Cancel Inspection</b> – Click to cancel an inspection with a <i>Scheduled</i> status. Enter a cancellation reason and confirm to permanently remove the inspection.</li> <li>• <b>Update ETA</b> (update estimated time of arrival) – Click to enter your ETA at the property in the <b>Start Time</b> and <b>End Time</b> fields. You can use the <b>Delete</b> button to delete the previously saved values.                           Your agency can set up automatically generated notifications when an ETA is updated using the Permit Inspection ETA Updated or Business License Inspection ETA Updated communication events and templates.</li> <li>• <b>Get Information</b> – Click to see inspection information, including who created the inspection and when, and who updated the inspection and when.</li> <li>• <b>View Summary Report</b> – View the inspection summary report for a completed inspection. The agency must configure the summary report first. See <i>Setting Up Reports</i>.                           You can also follow the agency steps for <i>Generating Reports</i> on a desktop.</li> </ul> For more information about these actions, see <i>Managing Scheduled Inspections</i> .
<b>Result</b>	Click the button to result the inspection on the Inspection Result page. For more information, see <i>Submitting Inspection Results</i> . The selected results appear in the inspection header information panel.
<b>Inspection Location</b>	Click the address link to view the inspection location on a map. If any location notes have been added, they appear here.
<b>Reference Entity</b>	Click the link to view the reference entity details. Only available on permit inspections when 1 or more reference entities were selected during scheduling and you're working online. For more information, see <i>Requesting and Scheduling Inspections</i> .
<b>Schedule</b>	Displays the scheduled date or date and time, depending on the inspection type's schedule method set up by the agency; the ETA or estimated time of arrival, if provided; and the inspector arrival. Depending on the agency setup, inspector arrival can be a specific time, time range, or date only.

Page Element	Description
<b>Previous inspection &lt;date&gt;</b>	Click the previous inspection date link to open the <b>Inspection history</b> drawer, which contains information about the current reinspection and failed inspection. For more information, see the section, "Reviewing Inspection History," in this topic.
<b>Inspection Result</b>	Displays the result provided on the Inspection Result page. Depending on the scoring method, you may see Total Score, the number of Major Violations, and Grading information.
<b>Assess Fee</b>	Displays Yes or No depending on the <b>Assess Fee</b> selection on the Inspection Result page.
<b>Inspector</b>	Displays the name of the assigned inspector.
<b>Comment</b>	Displays inspection comments, If there isn't any inspection comment, you won't see the section.
<b>Location Contact</b>	Click the name of the location contact for preferred contact information such as phone number, and email address or text message.
<b>Permit or Business License</b>	<p>Displays the application type and number, application status, the number of conditions applied to the application, and the level of the most severe condition. Here's how you can access more information when you're working online:</p> <ul style="list-style-type: none"> <li>• Click the application type link to open the application details.</li> <li>• Click the link with the number of conditions to open the Conditions page.</li> </ul> <p>If available, the application description is displayed. Business licenses also display the Doing Business As (DBA) name.</p>

## Working with the Inspection Detail Panels

You work with different aspects of the inspection using the inspection detail panels. Here's information about the panels:

Panel Name	Description
<b>Checklists</b>	<p>Displays the checklists set up by the agency for the inspection type, including the checklist name, the number of items in each checklist, and the number of checklist comments and attachments, if any. This panel is unavailable if the inspection type isn't set up to use checklists.</p> <p>Click the name of the checklist to open the Checklists page. From here you have access to the inspection checklist items. See <a href="#">Using Inspection Checklists</a>.</p> <p><b>Note:</b> You can't work with checklists if there's a condition on the application that prevents the final inspection or prevents inspection results.</p> <p>Click the <b>Checklists</b> link to open the checklists page. For more information, see <a href="#">Using Inspection Checklists</a>.</p>

Panel Name	Description
<p><b>Comments</b></p>	<p>Displays the inspection comments. Checklist comments are available only on the Checklists page.</p> <p>Click the <b>Add Comment (+)</b> button to add an inspection comment.</p> <p>For each comment listed in the panel, you can do this:</p> <ul style="list-style-type: none"> <li>• View the comment text, who created the comment and when, and who updated the comment and when.</li> <li>• View a badge to indicate whether the comment can be viewed by the public (Public) or only agency staff (Private). Inspector comments are visible to the public unless the agency selects an option to hide them.</li> <li>• Click the <b>View Details</b> button to open the Comments page. Review or add comments related to the inspection.</li> </ul> <p>Click the <b>Comments</b> link to open the comments page, where you can also search comments. For more information about comments, see <i>Working with Comments</i>.</p>
<p><b>Attachments</b></p>	<p>Displays a list of inspection attachments.</p> <p>Use the <b>Drag and Drop</b> region to add attachments or documents related to the inspection, such as videos or annotated photos. Click the region to select a local file or drag a file into the region to upload the file.</p> <p>Use the <b>Search</b> field to find an attachment.</p> <p>For each attachment listed in the panel, you can click the three-dot actions button and select an action. Download and delete actions are available depending on your permissions.</p> <ul style="list-style-type: none"> <li>• <b>View Details:</b> Open the <b>Attachment details</b> drawer and view the file details.</li> <li>• <b>Download:</b> Download a copy of the file.</li> <li>• <b>Preview:</b> Open a preview window.</li> <li>• <b>Delete:</b> Remove the file.</li> </ul> <p>Click the <b>View all attachments</b> link to open the attachments page. For more information about attachments, see <i>Working with Application Attachments</i>.</p>
<p><b>Signature</b></p>	<p>Displays signature information for the inspection, including inspector, contractor, and owner signatures, depending on agency setup. Each type of signature may be designated as <i>Required</i>. This panel is unavailable if all of the inspections are not required for the inspection type.</p> <p>Click the <b>Not signed</b> link to open the signature drawer and sign in the fields provided.</p> <p>After saving, the signee's name appears as a link to view the signature. A date and time shows when the inspection was signed.</p>
<p><b>Time Recording</b></p>	<p>Displays time entries for the inspection. Available for permit inspections only.</p> <p>Click the <b>Add Time (+)</b> button to record the amount of time you spend on an activity.</p> <p>For each time entry listed in the panel, you can do this:</p> <ul style="list-style-type: none"> <li>• View the category and subcategory of the time entry associated with the time code, the amount of time entered, the agency staff associated with the time entry, and the time entry date.</li> <li>• Click the name associated with the time entry to open the <b>Time details</b> drawer, where you can make updates depending on your permissions.</li> </ul>

Panel Name	Description
	<ul style="list-style-type: none"> <li>• Delete the time entry.</li> </ul> <p>Click the <b>Time Recording</b> link to open the time recording page. For more information about adding and working with time entries for inspections, see <i>Reporting Inspection Time</i>.</p>

## Reviewing Inspection History

Clicking the **Previous inspection <date>** link for reinspections to open the **Inspection history** drawer, which contains information about the current reinspection and failed inspection.

Each inspection listed in the history displays summary information, including the inspection number, inspection type, inspector, location contact, and comments.

The reinspection is identified by a **Current view** badge and the **Scheduled** date or date and time, depending on agency setup for the inspection type. Close the drawer to return to the current reinspection.

The failed or previous inspection or inspections are identified by this information in the row:

- **Completed <date>** - Click the completed date or date and time link to open the completed inspection details for the failed inspection, including checklists, signatures, and more. For more information, see the descriptions in this topic.
- **Failing Result** and **Major Violations: <number>** - Identifies the result of the failed inspection and the number of major violations.

## Working with Conditions

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

Access condition details by clicking the **Conditions** link on the **Conditions** panel in the inspection detail panels. Here you can:

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

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

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

For more information about conditions, see *Working with Application Conditions*.

This example illustrates the drawer to apply a new condition from the Conditions page in the Inspector Application

The screenshot shows the Oracle Inspector Application interface. On the left, a sidebar displays the 'Conditions' section for permit '503 Rough Electrical - BLDG-INSP-2024-00018'. It lists one condition: 'Applied - Priority Low Construction Notice' with a sub-note 'Notice during construction for public property' and an application date of '3/14/24'. The main area is titled 'Apply new condition' and features a dropdown menu for 'Condition Name' set to 'Prevent Final Inspection'. Below this, a 'Severity' section has a 'Hold' tag. The 'Details' section includes 'Condition Rules' and 'Priority' options. Under 'Condition Rules', 'Prevent Final Inspection' is selected. Under 'Priority', 'Medium' is selected. There are also empty text boxes for 'Description' and 'Additional Information'. At the bottom right, there are 'Cancel' and 'Apply' buttons.

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**Conditions**  
503 Rough Electrical - BLDG-INSP-2024-00018

Search

1 item +

Applied - Priority Low  
Construction Notice  
Notice during construction for public property  
Applied on 3/14/24

**Apply new condition**

Select a condition  
Condition Name  
Prevent Final Inspection

Severity  
Hold

**Details**

Condition Rules

- Prevent Workflow Advancement
- Prevent Issue or Final
- Prevent Payment
- Prevent Inspection Schedule
- Prevent Inspection Result
- Prevent Final Inspection

Priority

- Low
- Medium
- High

Description

Additional Information

Cancel Apply

Click the **Add (+)** button on the Conditions page or inspection details panel to apply a new condition. When you apply a condition on the **Apply new condition** drawer, you select a condition and condition rules, and add a description. Here's how to apply a condition:

Page Element	Description
<b>Select a condition</b>	Select a condition name from the drop-down options. The available conditions depend on agency setup.  For more information, see <a href="#">Working with Application Conditions</a> and <a href="#">Setting Up Conditions</a> .
<b>Severity</b>	Displays a badge with the level of severity for the selected condition, such as <i>Lock</i> , <i>Hold</i> , or <i>Notice</i> .
<b>Condition Rules</b>	Select the rules for the condition, or accept the default rules set up by the agency. For example, <i>Prevent Final Inspection</i> .
<b>Priority</b>	Select the priority level, such as Low, Medium, or High. The priority level doesn't affect the severity or rules and is for information only.
<b>Description</b>	Enter a description of the condition.
<b>Additional Information</b>	Enter additional information, if desired.

Click the **Apply** button to apply the condition to the inspection.

## Types of Inspection Conditions

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

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

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

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

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

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

## Reporting Inspection Time

You can record the time that you spend working on inspections for the purposes of billing and reporting in the Inspector Application.

Access time reporting by clicking the **Time Reporting** link on the **Time recording** panel in the inspection detail panels. Here you can:

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

This example illustrates the Time Recording page with the **New time** drawer for entering a new time record.

Drawer that opens when adding a new time entry

**ORACLE**

### Time Recording

503 Rough Electrical - BLDG-INSP-2024-00018

Search

1 item +

Name	Category	Subcategory	Date	Hours	Minutes
Kaitlyn Haney	Inspection	Inspection Travel	3/14/24	0	30

**New time**

Name: Kaitlyn Haney

Date: 3/14/24

Time Type Code:

Enter a date on or after 3/14/24. Required

Category:  Subcategory:

Hours:  Minutes:

Comments:

Bill Rate (USD): 0  Override Bill Rate (USD)

Billable:

Total Fees: -

Click the **Add (+)** button on the Time Recording page or inspection details panel to add a new time entry. When you add a time entry on the **New time** drawer, you record the duration of the activity, whether the time is billable, and comments. You enter this information for each time entry:

Page Element	Description
<b>Name</b>	Select the inspector for the time entry.
<b>Date</b>	Enter the date for the time entry, such as when work was performed or travel occurred.
<b>Time Type Code</b>	Select the code for the type of time recorded from the drop-down list. For more information about time types, see <a href="#">Setting Up Time Entry Types</a> .
<b>Category and Subcategory</b>	Displays the time entry type category and subcategory defined for the code. For example, the category and subcategory could be Inspection and Inspection Travel, respectively, depending on the agency setup.
<b>Hours and Minutes</b>	Enter the number of hours and minutes for the time type.
<b>Comments</b>	Enter comments for the time entry.
<b>Bill Rate (USD) and Override Bill Rate (USD)</b>	Displays the bill rate in U.S. dollars that was set up for the inspector's job title. For more information, see <a href="#">Defining Job Titles</a> .  You can override the job title bill rate, if you have time recording management permissions.
<b>Billable</b>	Turn on the switch to indicate that this time entry is billable.
<b>Total Fees</b>	Displays the calculated fees.

When you save the time entry, it appears in the list of time records on the Time Recording page in the inspection details. For more information about time reporting, see [Viewing Recorded Time for an Application](#).

## Using Inspection Checklists

An inspection can have one or more checklists that cover the scope of the codes and requirements. Depending on the permit or business license application requirements, an inspection may have checklists with one or more checklist items. You work through the checklists and provide inspection results on the checklist pages in the Inspector Application.

To access the checklists, click the link with the checklist name in the **Checklists** panel for the inspection. This panel is only available for inspections set up with one or more checklists. When you're performing an inspection, you can do the following at the checklist level:

- View results progress, if the inspection has checklist items.

- Work with checklist items.
- Provide a result for the checklist.
- Review or add checklist or checklist item attachments.
- Review or add checklist or checklist item comments.

**Tip:** You must complete inspection checklists including the checklist items marked as required before you can submit the result for the overall inspection.

Note that inspectors can't update checklist or inspection results if the permit or business license application has a condition with one of these condition rules: *Prevent Inspection Result* or *Prevent Final Inspection*.

This example illustrates an inspection checklist page with checklist items, containing the field values described in the surrounding text.





The screenshot displays the Oracle Inspector Application interface. At the top left, the Oracle logo is visible. The main header area shows a back arrow, the title 'Checklists', and the project name '503 Rough Electrical'. On the right side of the header, there are 'Save' and 'Result Inspection' buttons. The main content area is titled '1. ELE\_Checklist' and contains a 'Passing Result' / 'Failing Result' selector and an 'Apply to checklist items' checkbox. Below this, there are four checklist items, each with a 'Required' status and a 'Passing Result' / 'Failing Result' selector:

- 1.1. Circuit breaker - Required
- 1.2. Outlets - Required
- 1.3. Small-appliance - Required
- 1.4. Switches - Required

Each item has a 'Passing Result' / 'Failing Result' selector and a comment icon (speech bubble) to its right. The interface is clean and modern, with a dark teal header and a light gray main area.

Checklist items if set up for the inspection appear as an indented list under the checklist.

Here's how to work with the checklist and checklist items:

Page Element	Description
 or 	<p>Click the <b>Add Comments</b> conversation bubble icon with the plus sign to enter comments.</p> <p>Click the <b>Show Comments</b> icon to open the comments page and view the added comments or add more.</p>
 or 	<p>Click the <b>Add Attachments</b> paperclip icon with the plus sign to add attachments.</p> <p>Click the <b>Show Attachments</b> icon with the paper and paperclip on it to show the added attachments or add more.</p>
<p><b>Required</b></p>	<p>Indicates that a checklist item is required.</p>
<p>Checklist-level result buttons and <b>Apply to checklist items</b> switch</p>	<p>Click the desired result button at the checklist level. Possible results are defined by the agency. For example, click the <i>Passing Result</i> or <i>Failing Result</i> button. Result buttons aren't available at the checklist level when the agency has set up scoring.</p> <p>Turn on the <b>Apply to checklist items</b> switch to apply the selection to all of the checklist items as well.</p> <p>You must complete the inspection checklists including required checklist items before you can submit the result for the overall inspection.</p>
<p>Checklist item-level result buttons</p>	<p>Click the desired result button at the checklist item level. You can click the button again to deselect the result. Possible results are defined by the agency. For example, click the <b>Passing Result</b> or <b>Failing Result</b> button. If scoring is set up, you'll see scoring results at the checklist level. You may also see <b>Major Violation</b> depending on agency setup for negative results.</p> <p>You must complete the inspection checklists including required checklist items before you can submit the result for the overall inspection.</p>
<p><b>Save</b></p>	<p>Click this button to save your work without submitting the inspection results.</p>
<p><b>Result Inspection</b></p>	<p>Click to open the Inspection Result page, where you can review and submit final results for the inspection you're working with. For more information, see <i>Submitting Inspection Results</i>.</p> <p><b>CAUTION:</b> You can't update the inspection result on the checklist items, checklists, and inspection when a condition to prevent the inspection result has been applied. You must resolve the issue first and when necessary, reschedule the inspection. Before you can update the inspection result on a final inspection all of the required inspections for the application must be complete with a passing or completed result.</p>

## Submitting Inspection Results

In the Inspector Application, you can submit inspection results to complete assigned inspections one at a time through the inspection or submit results for several inspections at once by selecting inspections on the Inspection Tasks page.

Whether you complete an individual permit or license inspection by accessing the Inspection Result page from the inspection overview detail panel or you provide results in a batch that you select on the Inspection Tasks page, the information needed to complete the inspections is the same. Here's how to provide and submit the permit and license inspection results:

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

**Note:** Inspectors can't submit a completed inspection if required comments or signatures are missing. You must also complete all checklists and required checklist items as well as resolve any application conditions that affect the inspection. For example, you can't result an inspection for a permit or business license if a condition with the rule *Prevent Inspection Result* or *Prevent Final Inspection* has been applied.

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

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

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

This example illustrates the Inspection Result page for resulting an individual inspection, containing the fields described in the surrounding text

**ORACLE** SC

**< Inspection Result** Submit Results  
Foundation - INSP-2026-00029

### Checklist result summary

The inspection shows all listed items were Passed overall.

- **Concrete coverage (minimum 3")**; Pass
- **R-values for Zone 4: Ceilings R-38 (markers affixed to trusses at combo inspection); wood framed walls R13; mass walls R-5; floors R-19; basement & crawl space wall R-10/13; concrete slab R10, 2 feet; IECC 402.1; Table 402.1.1:** Pass
- **Floor joists within 18" & beams within 12" of soil; exterior & interior sill plates in contact with concrete treated R317 Floor/ girder spans per plans R502.5; Tables R502.5(1) & R502.5(2):** Pass
- **Roof sheathing properly rated, spaced & oriented R803.2:** Pass
- **Min. #4 copper or #2 aluminum water piping bond for (200 amp service) E3609; Table E360 3.1:** Pass
- **Gas line min, 10 PSI air test for 10 minutes G2417.4:** Pass

### Comments

There are no comments  
This summary is AI-generated. Verify the information for completeness.

### Inspection result

Inspection Result	Total Score	Rating
Pass	100	A

Assess Fee

### Signature

Inspector signature	Martha Paxton 3/5/26 12:47 AM Signature required
Contractor signature	Not signed.
Owner signature	Not signed.

### Comments and attachments

- Comments (1)
- Attachments (0)

Let's take a look at the information used to result inspections:

Page Element	Description
<b>Checklist result summary</b>	<p>Only available for inspections with checklists. Review the AI-generated summary of checklist results and save the summary to the inspection comments.</p> <p>For more information, see the section, "Using AI to Generate a Checklist Result Summary," in this topic.</p>
<b>Inspection result</b> section	<p>Click the radio button for the desired inspection result. The options available depend on agency setup. Depending on the method used to calculate the results, the system may automatically calculate the final result based on checklist results or you can select a passing or failing result. Click <b>Clear</b> to deselect any selected options.</p>
<b>Assess Fee</b>	<p>Turn on the <b>Assess Fee</b> switch to indicate that a fee should be assessed. If fee assessment is configured by your agency and this switch is turned on, the system calculates the fee and charges it back to the applicant when you submit the inspection. For more information, see the "Assessing Fees" section in this topic.</p>
<b>Comments and attachments</b> section	<p>Click the respective buttons to add comments or attachments.</p>
<b>Signature</b> section	<p>Click the <b>Not signed</b> link to add an inspector, contractor, or owner signature. Signatures might be marked as required. Click <b>Save</b> to submit the signature. You must also add the names of contractors and property owners when adding their signatures. To see submitted signatures, click the name link in the signature section or <b>Signature</b> panel in the inspection details; the date and time appear for each submitted signature.</p> <p>If all of the signatures are set up by the agency as not required, this section isn't available.</p>

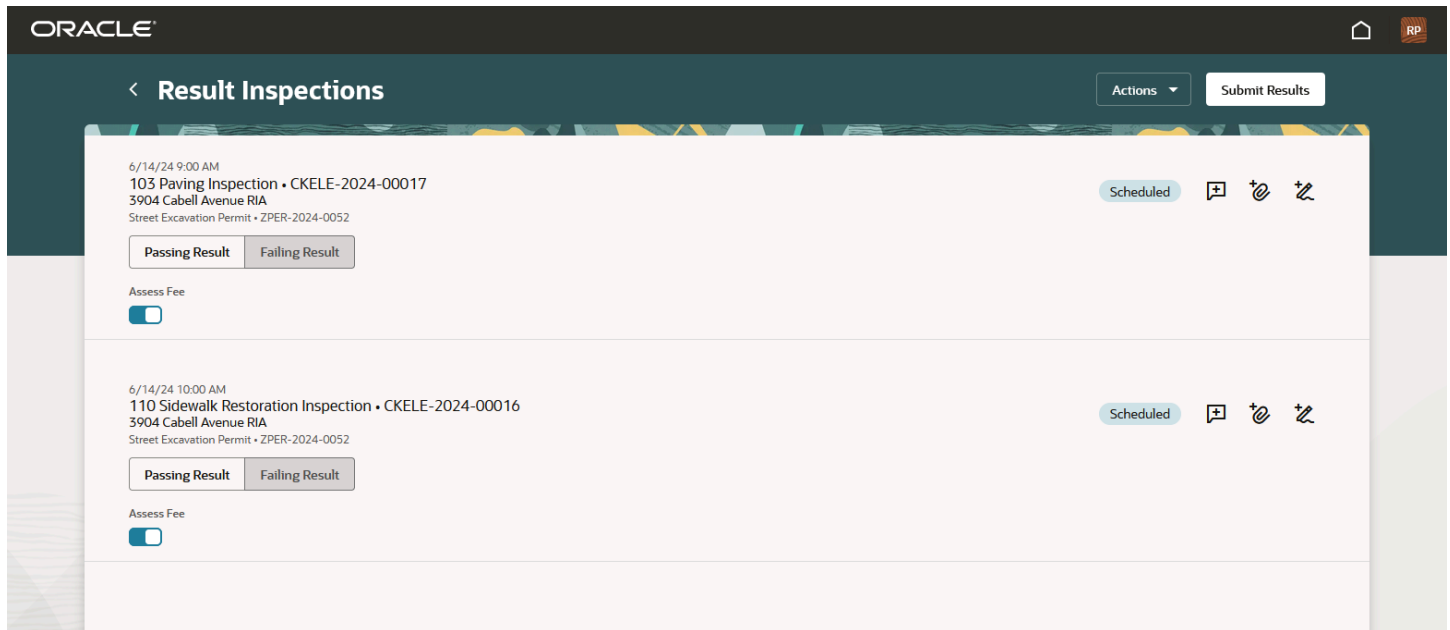
You can save your work when you make updates and submit the results using these buttons:

Page Element	Description
<b>Save</b>	<p>Click the save button on the Inspection Result page to save any updates before submitting the results.</p>
<b>Submit Results</b>	<p>Click to submit the entered inspection results, comments, attachments, and signatures.</p> <p><b>Note:</b> Inspectors can't submit a completed inspection if required comments or signatures are missing. You must also complete all checklists and resolve any application conditions that affect the inspection.</p>

## Completing Multiple Inspection Tasks

Inspectors and inspector supervisors can provide results for several inspections at once selected from a central location in the Inspector Application on a mobile device without first navigating to the inspection overview panel then to the Inspection Result page for each inspection.

This example illustrates the Result Inspections page for resulting multiple inspections, containing the fields described in the surrounding text



Here's how to provide results for inspections in a batch:

1. On the Inspection Tasks page, click the **Result Multiple** button.

2. Select the checkboxes for the inspections that you want to provide results for. The number of selected inspections is displayed.

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

- o The inspection status isn't completed or canceled.
- o The inspection checklists already have results, if they have checklists.  
When an agency enables an inspection type to use checklist items, inspectors can't result the inspection until the required checklist items are complete.
- o The applications don't have conditions like Prevent Inspection Result or Prevent Final Inspection applied to them.
- o Prerequisite inspections, if any, are already complete with passing or corrected results.
- o For final inspections, all other required inspections are complete with passing or corrected results.

If an inspection doesn't meet these requirements, you can't select it.

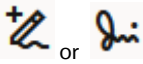
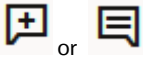
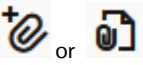
3. Click **Result Inspections**.
4. View the inspections you've selected on the Result Inspections page. Here you have a choice:
  - a. You can complete the result for each inspection on the Result Inspections page directly without going into each individual inspection. In this case, you can provide a different result for each inspection. You can also provide comments, attachments, and signatures, and turn on the assess fee option.
  - b. You can apply the same result and assess fee option to all of the selected inspections at once by clicking **Actions > Result All**.

Select the results that you want to apply to all of the inspections on the **Result all inspections** drawer.

**Note:** The Inspector Application featuring the Redwood Experience doesn't currently support applying the inspector signature to all of the inspections in the batch.

Provide the information on the inspection result pages as described here:

Page Element	Description
Result	<p>Depending on the method used to calculate the results, the system may automatically calculate the final result based on checklist results or you can select a passing or failing result.</p> <p>On the <b>Result all inspections</b> drawer, you can select a passing or failing result that is applied to all of the inspections on the Result Inspections page. This option overwrites any existing results that have been calculated, but won't override the system-calculated result for inspections using the scoring method.</p>
Assess Fee	<p>Turn on the <b>Assess Fee</b> switch to indicate that a fee should be assessed. If fee assessment is configured by your agency, the system calculates the fee and charges it back to the applicant when you submit the inspection. For more information, see the "Assessing Fees" section in this topic.</p> <p>The switch on the Result all inspections drawer applies fee assessment to all of the inspections on the Result Inspections page.</p>

Page Element	Description
	<p>Click the <b>Add Signatures</b> pen icon with the plus sign on the Result Inspections page to enter <b>Inspector, Contractor, or Property Owner</b> signatures. Click the <b>Not signed</b> link to open the Signature drawer and sign. You must also add the names of contractors and property owners when they add their signatures.</p> <p>Click the <b>Show Signatures</b> signature icon to open the Signature drawer and view the added signatures or add more.</p>
	<p>Click the <b>Add Comments</b> conversation bubble icon with the plus sign to enter comments. Note that you can't add comments on the Result all inspections drawer.</p> <p>Click the <b>Show Comments</b> icon to open the comments page and view the added comments or add more.</p>
	<p>Click the <b>Add Attachments</b> paperclip icon with the plus sign to add attachments. Note that you can't add attachments on the Result all inspections drawer.</p> <p>Click the <b>Show Attachments</b> icon with the paper and paperclip on it to show the added attachments or add more.</p>

- On the **Result all inspections** drawer, you can select a result and turn on the **Assess Fee** switch. Click **Apply to All** to apply your selections to the inspections in the batch. Note that you can't add signatures, attachments, or comments on the drawer.
- On the Result Inspections page, click **Submit Results**. You must submit the results and selections to complete the inspection.

**Note:** The option to submit results for all of the inspections isn't available if any required comments or signatures are missing.

## Using AI to Generate a Checklist Result Summary

You can use AI assistance provided on the Inspection Result page when you're working online, to generate a concise, readable summary of an inspection. This option is available for inspections with checklists and AI functionality has been enabled for the Permits and Business Licenses offerings. After you click the **Generate** button for the inspection, the checklist result summary provides a brief overview of the inspection outcome, evaluates the presence of major violations and failed checklist items. It summarizes all checklists and checklist items.

The AI summary can also report entity detail that is present in the underlying comments and results for permit inspections with reference entities.

The result summary is generated from these data:

- Inspection information including inspection comments
- Checklist comments and checklist item comments
- Checklist results and checklist item results

You can also click **Save as Comment** to capture, edit, and save the generated summary to the inspection comments.

For more information including agency setup to enable this AI functionality, see [Using Packaged AI Agents](#).

## Assessing Fees

Your agency may enable you to indicate that a fee should be assessed based on the inspection results for a specific inspection type. If fee assessment is configured by your agency and you turn on the **Assess Fee** switch, the system calculates the fee and charges it back to the applicant when you submit the inspection. For example, if you fail a plumbing inspection and a reinspection is required, you may want a fee to be assessed for the reinspection.

Your agency must set up the inspection type and Business Rules Framework to automatically assess fees. For more information, see [Setting Up Inspection Types](#) and [Setting Up Add Fee Actions](#).

## Sending Notifications

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

- Permit Inspection Complete or Business License Inspection Complete
- Permit Final Inspection Passed or Business License Final Inspection Passed
- Permit Inspection Canceled or Business License Inspection Canceled
- Permit Inspection ETA Updated or Business License Inspection ETA Updated

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

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

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

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

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

## Using Offline Mode for Inspections

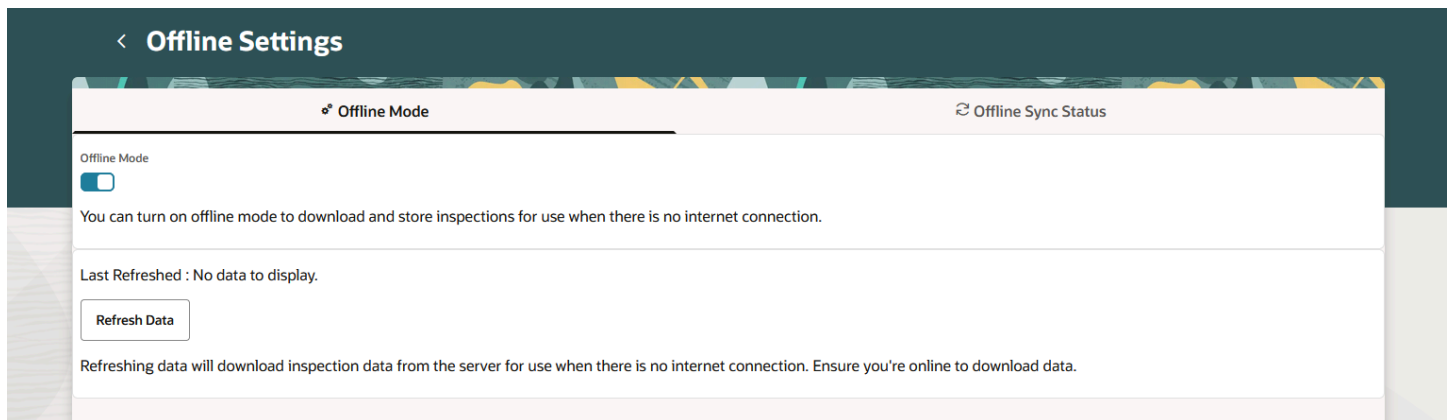
The mobile inspection application automatically connects to your agency's servers when a network is available, but you can also perform mobile inspections using offline functionality in locations where you don't have access to the agency's servers.

The Inspector Application for downloads data to your mobile device for use offline. When your Internet connection is restored and you're back online, the sync process immediately sends data back to your agency's Permitting and



Licensing Cloud to update the data on the agency server. A sync in progress indicator icon appears at the top of the page. If there's a sync error, a sync error icon is displayed. The inspector can access the Offline Settings - Offline Sync Status page to review the sync issues.

The actions performed offline are transferred back to the agency server once online again, and the changes you made in the offline mode are updated with the changes in the application as well. This way, data in your mobile device browser is synchronized with the permit and business license applications data.

This example illustrates the Offline Settings page in a tablet form factor with the **Offline Mode** tab selected. The **Offline Mode** switch is turned on.



Use the offline settings to manage offline inspections in the Inspector Application. You may only see the icons without labels when viewing the page on a smaller mobile device.

Page Element	Description
 <b>Offline Mode</b>	Click the Offline Mode tab to access the switch to turn on the offline mode or refresh data.
 <b>Offline Sync Status</b>	Click the Offline Sync Status tab to view the status of the sync processing between offline and online modes.

## Work with Offline Settings

Your agency determines whether you can work offline. If your agency supports offline mode, you can turn it on or off in the mobile application.

In Inspector Application, click the profile avatar after you sign in to view the menu. Select the **Offline Settings** menu item to open the Offline Settings page.

Here's how to work with offline settings on your mobile device:

Page Element	Description
<b>Online Mode</b>	Turn on the switch to download and store inspections for use when an internet connection is disconnected. If offline mode is enabled, cached data is refreshed daily.
<b>Refresh Data</b>	Click this button to get a data refresh when the system next checks for updates. Ensure you're online to download data.

## Data Is Downloaded to Your Device

When you log in to the mobile application each day, your inspection data is refreshed and downloaded to your device. The type and amount of data downloaded depend on your inspection assignments and agency configuration settings.

**Full Data Download:** This inspection data is fully downloaded and cached.



- Assigned inspections for today and overdue: All inspections assigned to you for the current date and any overdue inspections are fully downloaded, except those marked as Canceled or Completed.
- Downloaded information includes inspection details, checklist, checklist items, comments, attachments, and time recording.
- Reference entities: The primary reference entity (such as a building or facility) is included, but detailed attributes (such as specific floors being inspected) aren't downloaded.

**Partial Data Download:** Other inspection data is downloaded in a limited, or partial, form.

- Future and past inspections: Inspections assigned to you within an agency-configured number of days before and after the current date are partially downloaded. For more information about the agency settings, see [Managing Offline Mode for Inspections](#).
- Downloaded information includes inspection details, permit overview, and permit conditions.
- Checklists, checklist items, comments, attachments, and time recording aren't downloaded in the partial data download.
- You can't result or submit results for inspections that only have partial data.

**Note:** The first time that the Inspector Application syncs for the day with your agency's data for working offline may take several minutes. The length of time depends on the amount of data to download and cache, such as number of scheduled and overdue inspections and final attachments. Subsequently the sync process goes more quickly.

The data download status appears in the global header area at the top of the page:

Download Status	Description
	Displayed when data is refreshing after clicking the <b>Refresh Data</b> button on the Offline Settings – Offline Mode tab. Once the refresh is complete, the icon disappears.
	Displayed when the system is online and cached data is being downloaded.  If there's an interruption in network connectivity, the Inspector Application automatically resumes downloading the data when the agency server is available again until the download is complete.

## Perform Inspections While You're Offline

You can view, create, and edit inspection records in the offline mode, and then the mobile service will sync them once the network connection is restored. This includes comments, supporting documents, and required signatures.

An icon indicates when there's no internet connection and the inspector is working offline:



If an inspector creates new inspection and assigns it to themselves while offline, the inspection won't be available for inspector to work on yet. The newly created inspection needs to be synced to the agency server first; the data is cached to the inspector's device as part of the intermittent system update at an interval set up by your agency.

If you're working offline and try to access inspections before or after today, you'll see partial information. You'll see the inspection details, permit overview or business license activity summary, and application conditions but not the checklist, checklist items, comments, attachments, and time recording. See the section "Data Is Downloaded to Your Device" in this topic.

If you can't add results, check to see if a condition has been placed on the application. Once any issues are resolved and all of the required results and signatures are complete, you can submit the inspection. All of the actions you perform are sent to the agency's server when you're back online.

**Note:** Any features that need to interact with online data, or interact with other applications, are not available offline. These include the AI-generated checklist result summary, maps, and reports.

## Offline Updates Are Saved

When you are working offline, you can see all of the data that was saved onto the device while you were online. The changes you make are synchronized to the server when you're back online.



When the application is in offline mode, you can't view any updates that were made by other inspectors or the agency to the inspection data. You can view those data updates only after refreshing the data that is cached. The data is cached to the inspector's device as part of the intermittent system update at an interval set up by your agency. For more information about the **Check for Updates** setting, see *Managing Offline Mode for Inspections*.

## Offline Data Is Synchronized

Your data synchronizes automatically when the device detects a network connection and goes online. You'll see the Synchronization in Progress icon during the sync process.

**CAUTION:** Wait until synchronization is complete before disabling the offline mode. If you disable the offline mode after performing actions and before synchronizing with the agency’s servers, you’ll lose the work you did offline. Check with your system administrator if you receive persistent errors.

The sync status appears in the global header area at the top of the page:

Sync Status	Description
	Displayed when sync is in progress. When going from offline to online, the system automatically syncs the data to the agency server. The system starts the sync process immediately when an online connection is detected.
	Displayed when there's a sync error. The inspector can review sync issues on the Offline Settings – Offline Sync Status tab.

## Resolve Synchronization Errors

Either you or the inspections supervisor can use a desktop or laptop to go to the offline sync management. In the Ask Oracle global search, enter **Inspector Offline Sync Management** and select the link to access the Offline Inspection: Conflict and Error Management page. Here you can troubleshoot errors for a particular inspection. The error description indicates the issue to be resolved, which can be fixed while online on your desktop or laptop.

Here's the information to review on the Offline Inspection: Conflict and Error Management page:

- **Inspection**
- **Location**
- **Application**
- **Issue Type**
- **Inspected By**
- **Resolution Status**

For example, you may need to resolve a condition placed on an application while you were offline, causing a synchronization error. After you’ve fixed the problem, you can manually synchronize with your mobile device and refresh the data from the error management page.

If you are online and the synchronization is causing errors, you can disable the offline mode on your mobile device on the Offline Settings page in the Inspector Application and continue to work online. You’ll lose any new work you performed if you turn off the offline mode while offline. Check with your system administrator if you receive persistent errors.



# 13 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 using the Redwood interface.

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.

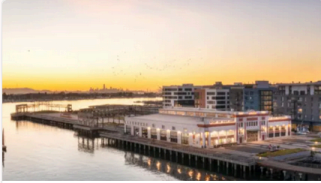
Agency staff create and manage such inventory of projects comprising of various records and their attributes, and maintain detailed project information – all easily accessible from one location – the Projects page.

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** Search Status Type In progress projects Create Project


Sort By Project Name Download



**Active** Community Village

**Brooklyn Basin**  
Designed to reconnect the city with its historic waterfront, Brooklyn Basin will create a vibrant new mixed-use...  
2259 HARBOR BAY PKWY, ALAMEDA


[View Details](#)



**Active** Neighborhood Commercial

**Kissel Uptown Development**  
In the heart of the growing Uptown district around the Hive, Kissel Uptown Hotel, a six-story building features a 168-roo...  
2203 Central Avenue, ALAMEDA

[View Details](#)



**Active** Business Park

**SSG Project**  
SSG Project is business park development in the downtown area.  
1241 Park Street, ALAMEDA

[View Details](#)

0

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. From the Fusion Applications Permitting and Licensing homepage, select the **Projects** tile.
2. On the Projects page, you can perform these actions:

Page Elements	Description
<b>Create Project</b>	Click to open the <b>New project</b> drawer and create a new project, assign transactions, and create contacts.
<b>Search</b>	Search by alphanumeric characters on the fields for projects in the list. The projects that meet the search criteria are displayed on the page.
<b>Filter</b>	Apply filters to display projects that contain the selected parameter values in the list. Click the filter button to open the Filter By options, where you can define and save your own filters.
<b>Sort by</b>	Select an option to sort the projects in the list by these fields: <ul style="list-style-type: none"> <li>○ Address</li> <li>○ City</li> <li>○ Status</li> <li>○ Project Name</li> <li>○ Project Type</li> </ul>
<b>View Details</b>	Click to access the details page for the selected project.

## Adding a New Project

As an agency staff, you can create new projects to include transactions and contacts.

1. From the Fusion Applications Permitting and Licensing homepage, click the **Projects** tile.
2. On the Projects page, select the **Create Project** button.  
On the Projects page, select the button.
3. On the New project drawer, add values for the fields in the Projects section:

Page Elements	Description
<b>Name</b>	Enter the name of the project.
<b>Summary</b>	Enter a detailed description of the project.
<b>Project Type</b>	Select the type of project from the list of options.
<b>Status</b>	Select the status of the project: <ul style="list-style-type: none"> <li>○ Active</li> <li>○ Canceled</li> <li>○ Completed</li> <li>○ Inactive</li> <li>○ On Hold</li> </ul>
<b>Start Date</b>	Enter the start date for the project.
<b>End Date</b>	Enter the end date of the project.
<b>Estimated Valuation</b>	Enter an estimated amount for the project.
<b>Currency</b>	Displays the currency used for the transactions.
<b>Primary Address</b>	Click the drop-down list to search for the parcel, address, or owner values by keyword. Click to select the record you want.
<b>Primary Contact</b>	Select a contact from the drop-down list.  Once the contact is selected, use the <b>Contact Type</b> option to select the type of contact.

4. When you click **Save** a pop-up window appears asking you to upload a project image. You can either add it immediately or choose to upload later from the project details 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 **Transactions** tab to assign transactions to your project. Transactions include permits, planning applications, and preapplications.

1. From the Fusion Applications Permitting and Licensing homepage, click the **Projects** tile.
2. On the Projects page, click the project record or the **View Details** button on the project record that you want to assign transactions to.
3. On the Project Details page, click **Transactions** on the left panel.
4. On the Transactions page, select the transaction type tab: permits or planning applications. From the list of applications displayed, select the applications to link to the project, and click the **Link Applications** button.
5. The **Link applications** drawer 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 **Transactions** 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. From the Fusion Applications Permitting and Licensing homepage, click the **Projects** tile.
2. On the Projects page, click the project record or the **View Details** button on the project record from which you want to unassign transactions.
3. On the Project Detail page, click **Transactions** on the left panel.
4. On the Transactions page, click the **Edit** button, which enables you to select transaction records to unassign.
5. Use the check box available against each transaction record that you want to unassign and then click the **Unassign** button.

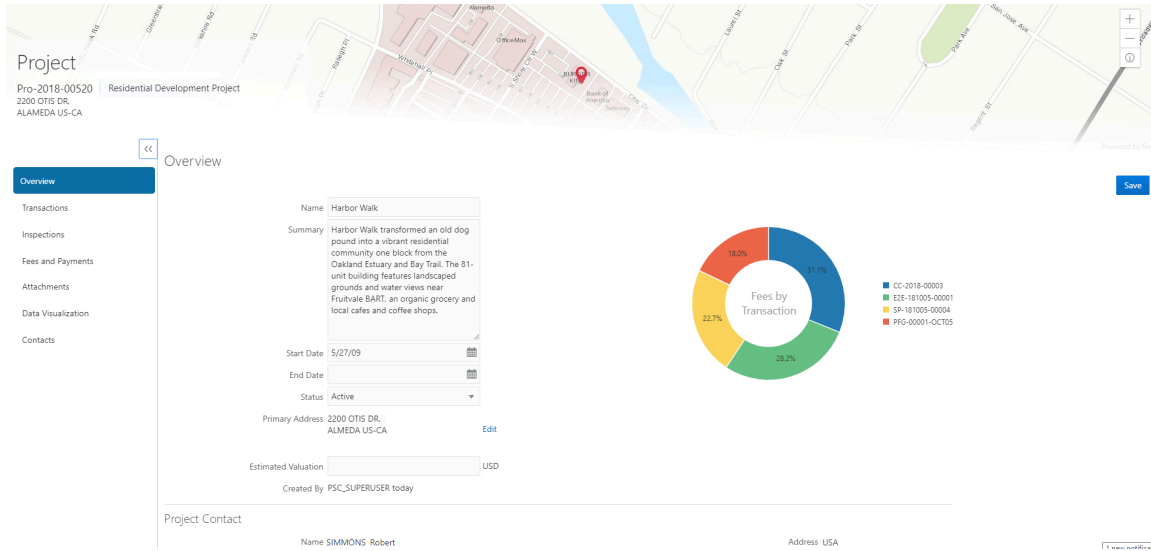
## Viewing and Updating Project Details

You view and manage projects comprising of transaction assignments, project attachments, and project contacts on the Project Details page.

The header displays the project code, project type description, and the project primary address. A map marker displays the primary location of the selected project on the map.

The left panel lists the various links to the project detail pages – Overview, Transactions, Inspections, Fees and Payments, Attachments, and Contacts. Clicking each link opens the detail view on the right panel.

This example illustrates the Project Details page:



## Using the Overview Page

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

1. From the Fusion Applications Permitting and Licensing homepage, click the **Project List** tile.
2. On the **Projects** page, click a project record to open the Overview page.
3. On the Overview page, review details or enter information in the **Overview** section:
- 4.


Page Elements	Description
<b>Project Details</b> section	
<b>Name</b>	View the name of the project.
<b>Summary</b>	View a detailed description of the project.
<b>Project Type</b>	View the type of project.
<b>Start Date</b>	View the start date for the project.
<b>End Date</b>	View the end date of the project.
<b>Created By</b>	View the name of the user who created the project record.

Page Elements	Description
<b>Estimated Valuation</b>	View the estimated amount for the project.
<b>Update Details</b> button	Use the button to open the <b>Project details</b> drawer, from where you can update the details for the project, such as the name, summary, status, start and end dates, valuation and address. You can also update or delete the project image.
<b>Primary Contact</b> section	
<b>Primary Contact</b>	View the name, phone, address and email for the primary contact for the project.
<b>View Details</b> button	<p>Click the button to go to the Contacts page for the project. You can add new contacts or select saved contacts to be added to the project.</p> <p>Only one contact can be marked as primary at a time. If you turn on the <b>Primary</b> switch for another contact, then that contact becomes the only primary. A primary contact cannot be deleted. To delete a contact, first mark another contact as primary and then from the row Actions menu, select the option to delete.</p>
<b>Fees and Payments</b> section	
<b>Total Fees</b>	View the sum of all the fee values from all the transactions assigned to the project.
<b>View Details</b> button	Click the button to go to the <b>Fees and Payments</b> page for the project.

## Using the Transactions Page

1. On the Projects page, click the project card or select the **View Details** button for a project in the grid.
2. Click **Transactions** on the left panel to access the list of transactions that are assigned to the project. The transactions are listed in different tabs based on the application types: Permits, and Planning Applications. The Transactions page provides these details:

Page Elements	Description
<b>Search</b>	Use the Search field to search for applications to be linked to the project. By default, this field has an <b>In Progress Applications</b> filter applied.
<b>Link Applications</b> button	<p>Click to open the <b>Link Applications</b> drawer and select transactions to link to the project.</p> <p>See <b>Assigning Transactions</b> under <i>Adding a New Project</i>.</p>

Page Elements	Description
<b>Actions</b> menu	From the row-level <b>Actions</b> menu, you can view the details of the application linked to the project, as well as remove it from the project.  See <b>Unassigning Transactions from a Project</b> under <i>Adding a New Project</i> .  See <i>Navigating to Planning Application Details</i> .
	Click the <b>Export</b> icon to download the list of applications in a CSV file format. The downloaded file displays all visible fields in separate columns.
<b>Application ID</b> and <b>Application Type</b>	Displays the unique identifier of the application and its type.
<b>Status</b>	Displays the status of the application.
<b>Condition</b>	When applicable, displays the name of the condition applied to the application.
<b>Property</b>	Displays the address of the property for which the application is applied.
<b>Description</b>	Displays the description or scope of work for which the application was created.
<b>Applicant</b>	Displays the name, email ID, and contact number of the applicant associated to the transaction.
<b>Submitted On</b>	Displays the date on which the application was submitted.
<b>Expiration Date</b>	Displays the date on which the application is set to be expired.
<b>Total Fees</b> and <b>Balance Due</b>	Displays the total fees paid and the balance due, if any.

## Using the Inspections Page

1. On the Projects page, click the project card or select the **View Details** button for a project in the grid.
2. Click Inspections on the left panel to access the list of permit inspections that are assigned to the project. The Inspections page provides these details:

Page Elements	Description
<b>Application ID</b> and <b>Application Type</b>	Displays the application ID and type.

Page Elements	Description
<b>Inspection</b> and <b>Inspection Type</b>	Displays the inspection ID and type.
<b>Status</b>	Displays the schedule status of the inspection, for example, Scheduled, Requested, Completed, and Canceled.
<b>Inspection Schedule</b>	Displays the time and date set for the inspection.
<b>Inspector</b>	Displays the inspector assigned to the inspection.
<b>Property</b>	Displays the property associated with the inspection.
<b>Result</b>	Displays the result of the inspection, Pass or Fail.
<b>Reference Entity</b>	Displays the reference entity associated with the inspection.
<b>Actions</b> menu	From the row-level <b>Actions</b> menu, click <b>View Details</b> to view the details of the inspection for the project. All sections on this page are display-only. Use the <b>View Application</b> action to view the application associated with the inspection.  See <i>Reviewing Inspection Details</i> .

## 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. On the Projects page, click the project card or select the **View Details** button for a project in the grid.
2. Click **Attachments** on the left panel to access the attachments associated with the project.
- 3.



Click the **Export** icon to export the attachments as a .csv file.

4. To find a specific attachment, you can enter values in the search field.
5. The Attachments page provides these details in the grid:

Page Elements	Description
<b>File Name, File Size, Uploaded By, Uploaded On</b>	View the following information in the Filename field: <ul style="list-style-type: none"> <li>o Filename with file type extension</li> <li>o File Size</li> </ul>

Page Elements	Description
	<ul style="list-style-type: none"> <li>○ Uploaded By user name</li> <li>○ Uploaded On date</li> </ul>
<b>Description</b>	View the description of the attachment as entered by the user who added the attachment.
<b>Actions</b>	<p>Click the actions icon to select and perform an action:</p> <ul style="list-style-type: none"> <li>○ View Details</li> <li>○ Download</li> <li>○ Delete</li> </ul>

## Adding Project Attachments

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

1. On the Projects page, click the project card or select the **View Details** button for a project in the grid.
2. Click the **Attachments** link to view the Attachments page for the project.
3. Click the **Add** icon.
4. Select the file to upload in the browser dialog box and click **Open**. The filename appears on the New attachment drawer.
5. On the New attachment page, you can enter a description of the file.
6. Click the **Upload** button.

## Downloading Project Attachments

You download a document on the Attachments page.

1. On the Projects page, click the project card or select the **View Details** button for a project in the grid.
2. Click the **Attachments** link to view the Attachments page for the project.
3. In the attachments grid, click the three-dot Actions menu for the document you want to download.
4. Select **Download** and save to the location of your choice.

You can also select multiple attachments using the row checkboxes and download them together using the **Download** button available above the attachments grid.

## Deleting Project Attachments

You can use this method for deleting one or more documents.

1. On the Projects page, click the project card or select the **View Details** button for a project in the grid.
2. Click the **Attachments** link to view the Attachments page for the project.
3. Click the **Edit** icon above the grid.
4. Select one or more documents to delete.
5. Click the **Delete** icon.
6. To delete a single document, access the Attachments page, and select **Delete** in the Action menu for the document you want to delete.

You can also select multiple attachments using the row checkboxes and delete them together using the **Delete** button available above the attachments grid.

## Using the Contacts Page

1. On the Projects page, click the project card or select the **View Details** button for a project in the grid.
2. 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.
3. From the three-dot Actions menu, click **View Details** for the contact record to open the **Contact details** drawer. You can review and edit certain fields here.

**Note:** You cannot delete a primary contact or turn off the **Primary Contact** 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.

4. Click **Save** to save your changes to the Contact details drawer and return to the **Contacts** page.
5. Click **Add New Contact** to add a brand-new contact manually. You create a new contact by entering all the contact details and then include in the transaction.

As a registered user, you cannot make primary contact assignments for your project.

6. Click **Select from Saved Contacts** to add a contact from the registered contacts. First, select a contact name from a list of contacts that are already registered in the system and then add the details.

As a user, you cannot make primary contact assignments for your project. Only agency staff such as an administrator can change a primary contact from the registered profiles. Once changed, the primary contact that was selected at the time of creating the project will longer be a primary contact.

## Using the Fees and Payments Page

1. On the Projects page, click the project card or select the **View Details** button for a project in the grid.
2. Click Fees and Payments on the left panel to access the details of the fees and payments associated with a submitted transaction. The Fees and Payments page provides these details:

Page Elements	Description
<b>Total Fees</b>	<p>Displays the total amount of fees that may be applicable to the transaction.</p> <p>You can see this both at the top of the grid and as a column in the grid.</p> <p>At the grid level, you can click the <b>Total Fees</b> link to access the Total fee details drawer, which displays details of the different types of fees.</p>
<b>Fees paid</b>	<p>Displays the amount of the total fees already collected.</p> <p>You can see this both at the top of the grid and as a column in the grid.</p>
<b>Balance Due</b>	<p>Displays the remaining portion of the fees yet to be collected.</p> <p>You can see this both at the top of the grid and as a column in the grid.</p>

Page Elements	Description
	At the grid level, click the link to access the <b>Amount details</b> drawer which lists the various fee items for which amount is due.
<b>Application ID Application Type</b>	Displays the application ID and type.
<b>Status</b>	Displays the status of the fees and payment transaction, for example Canceled, Pending, Hold, and Due.
<b>In Review</b>	Displays the fee still under review.
<b>Not Payable</b>	Displays the fees that are not payable due to various reasons.
<b>View Deposit Accounts</b> button	Click to open the <b>Deposit accounts</b> drawer 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** button on the **Fees and Payments** page. The **Deposit accounts** drawer lists the details of accounts:

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

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

# 14 Managing Property Information

## Security Details for Managing Property Information

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

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](#).

For more information about working with business license activity, case and incident, and permit and planning application comments using the Redwood Experience interface, see [Working with Comments](#).

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

## Security Details for Working with Parcel Comments

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

You can set up security for agency staff, applicants, and application contacts to manage comments.

**Note:** Before application contacts can manage comments, your agency must add the PSC Contact User duty role (ORA\_PSC\_CONTACT\_USER\_DUTY) to the PSC Custom Registered Public User role (CUSTOM\_PSC\_REGISTERED\_PUBLIC\_USER) and enable application access for the contact type.

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles

## Viewing the Parcel Page

View summary information of parcels in the agency's property parcel list.

Agency staff uses the Parcel list 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.

Select the **Property Parcels** option on the Permitting and Licensing home page.

Here's the information available for each parcel on the Parcel list page:

Page Element	Description
<b>Parcel Number</b>	The unique identifier of the parcel. This is also known as the assessor's parcel number (APN) for the parcel.  Click a parcel row to view its details.
<b>Condition</b>	Click the condition severity link to view a summary of conditions applied to the parcel.
<b>Primary Address</b>	The primary address of the parcel.
<b>Primary Owner</b>	The name of the primary owner of the parcel.
<b>Land Value and Improvement Value</b>	The land value and improvement value of the parcel.
<b>Zoning Code</b>	The zoning code of the address of the parcel.
<b>Status</b>	The current status of the parcel. Values are: <ul style="list-style-type: none"> <li>• <i>Active</i></li> <li>• <i>Retired</i></li> <li>• <i>Provisional</i></li> </ul>
<b>Enabled</b>	Turn on the switch to make the parcel available as a lookup value on other pages.
<b>Actions</b>	Click the trash can icon to remove a parcel from the list.

## Using Parcel List Search

By default, an **Active** filter chip is applied in the Search field to display property parcels with an Active status. Remove the filter chip to include parcels with other statuses, such as Provisional or Retired. You can also search by keyword in the **Search** field.

Parcel IDs are searched by full segment values between dashes. Partial segments (for example, 69-1) may not return results even if a parcel exists (for example, 69-103-xx). Use autocomplete results to select the full parcel, or search using complete segments such as 69-103.

For more information, see [Using Search](#).

## Updating Parcel Information

View and update all information related to a parcel.

Agency staff can view and update details of a parcel, such as the parcel type, status, property description. Sections are available for information on land use, building, location and map details.

You can navigate to the Parcel Details page, from the **Parcel** tile on the agency springboard. On the Parcel page, click the parcel row to manage its details.

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

Page Name	Description
<b>Parcel Details</b>	View and update details about the parcel such as the parcel type, status and property description. See <a href="#">Updating Parcel Details</a> section later in this topic.  For details on setting up parcels, see <a href="#">Setting Up Parcels</a> .
<b>Parcel Address</b>	View and update addresses associated with a parcel. See <a href="#">Updating Parcel Address Details</a> section later in this topic.  For details on setting up addresses, see <a href="#">Setting Up Property Addresses</a> .
<b>Parcel Owner</b>	View and update information about parcel owners on the Parcel Owner page. See <a href="#">Updating Parcel Owner Details</a> section later in this topic.  For details on setting up owners, see <a href="#">Setting Up Property Owners</a> .
<b>Parcel District</b>	View and update parcel district assignments on the Parcel District page. See <a href="#">section later in this topic</a> .  For details on assigning districts to parcels, see <a href="#">Assigning Districts to Parcels</a> .
<b>Transactions</b>	View summary information of all transactions associated with a parcel. For details, see <a href="#">Viewing Transactions Associated with a Parcel or Property Address</a> .

Page Name	Description
<b>Attachments</b>	Attachments provide supporting documentation needed by agency staff to manage parcels. For details, see <i>Working with Property Attachments</i> .
<b>Comments</b>	Agency staff can view, modify, and add comments on the Comments page for a parcel. For details, see <i>Working with Comments</i> .
<b>Conditions</b>	Agency staff can apply conditions to parcels so that users interacting with a property are notified of any issues with it. For details, see <i>Applying Conditions to Parcels and Addresses</i> .
<b>Genealogy</b>	Agency staff can create parcel genealogy transactions to manage parcel splits, merges and lot line adjustments, and attribute management. For details, see <i>Working with Parcel Genealogy Transactions</i> .
<b>Parcel Value</b>	View and update parcel values on the Parcel Value page. For details, see <i>Setting Up Parcel Values</i> .

## Updating Parcel Details

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click a row to view the parcel details.
3. On the Parcel Details page, click Edit.

Page Element	Description
<b>Enabled</b>	Turn on this switch to make the row available as a lookup value on other pages.
<b>Status</b>	The status of the parcel, which can be either <i>Active</i> , <i>Retired</i> or <i>Provisional</i> .
<b>Parcel Type</b>	The type of parcel.
<b>Property Description</b>	The property description of the parcel.
<b>Effective Start Date</b>	The date on which the parcel becomes valid.
<b>Land Value</b>	The land value of the parcel.
<b>Improvement Value</b>	The improvement value of the parcel.
<b>Net Assessed Value</b>	The net assessed value of the parcel.

4. 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*
5. 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*

6. In the Location and map section of the Parcel Details page, view and update the mapping and location details for the parcel using the following fields:
  - o *Map Name*
  - o *Book Number*
  - o *Map Book Page*
  - o *Block Number*
  - o *Lot Number*
  - o *Section Number*
  - o *Latitude*
  - o *Longitude*
  - o *X Coordinate*
  - o *Y Coordinate*
7. Click Update.

## Updating Parcel Address Details

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its details.
3. On the Parcel page for the chosen parcel, select the **Parcel Address** tab in the left navigation panel.

Page Element	Description
<b>Street Number</b>	The street number of the parcel address.
<b>Street Name</b>	The street name of the parcel address.
<b>Street Suffix</b>	The street suffix that further describes that street like Drive, Avenue, and so on.
<b>Direction Prefix</b>	The street direction of the parcel address.
<b>Unit</b>	The unit number of the parcel address.
<b>City</b>	The city of the parcel address.
<b>Postal Code</b>	The postal code of the parcel address.
<b>Primary</b>	Indicates whether the parcel address is marked as primary for that parcel.

- Click the link for the chosen parcel address to access the Address Details page and click **Edit** to make updates.

Page Element	Description
<b>Enabled</b>	Turn on this switch to make the row available as a lookup value on other pages.
<b>Primary</b>	Turn on this switch to indicate the address as the primary address for the parcel.  View the parcel number with this address and line one of the address.
<b>Building and location information</b>	View and update details, such as: <ul style="list-style-type: none"> <li>○ Street Number, Name and Suffix</li> <li>○ Address Type</li> <li>○ Direction details like latitude, longitude, and X, Y Coordinates</li> <li>○ Landmark, Crossroad</li> <li>○ Unit, Floor</li> <li>○ City, State, Postal Code</li> </ul>
<b>Contact information</b>	View and update details, such as: <ul style="list-style-type: none"> <li>○ Name</li> <li>○ Email Address</li> <li>○ Phone numbers (home, work, cell)</li> <li>○ Fax</li> </ul>

- 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](#).
- Click **Update**.

## Updating Parcel Owner 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 Owner** tab in the left panel.

Page Element	Description
<b>Owner</b>	The name of the parcel owner.

Page Element	Description
<b>Primary</b>	The name of the primary parcel owner.
<b>Address</b>	The parcel owner's address.

- Click the link for the chosen parcel owner to access the Owner Details page to make updates.

Page Element	Description
<b>Owner Details</b>	View and update the owner's name and type.
<b>Enabled</b>	Turn on this switch to make the row available as a lookup value on other pages.
<b>Primary</b>	Use the <b>Primary</b> switch to indicate if the specified owner is a primary owner or a secondary owner.
<b>Owner</b>	The name of the primary parcel owner.
<b>Secondary Owner</b>	The name of the secondary parcel owner.
<b>Owner Type</b>	The type of parcel owner, such as <i>Personal</i> or <i>Town</i> .
<b>Owner Address</b>	View and update the country, postal code and address of the owner.
<b>Contact Information</b>	View and update the contact information for the owner, such as email address, fax, phone numbers (home, work, cell, and so on).
<b>Transfer Information</b>	In the Transfer Information section of the Owner Details page, view the transfer details for the parcel owner.
<b>Last Transfer Type</b>	The last transfer type of the parcel owner.
<b>Document Number</b>	The document number of the parcel owner.

- The Parcel Owner page has several tabs in the left navigation panel, including the following pages:
  - Parcel, see [Viewing the Parcel Page](#).
  - Attachments, see [Working with Application Attachments](#).

6. Click **Save**.

## Viewing Parcel District Details

1. Select the **Parcel** tile on the Agency Springboard.
2. On the Parcel page, click the parcel row to view its details.
3. On the Parcel page for the chosen parcel, select the **Parcel District** tab in the left panel.

Page Element	Description
<b>District and Description</b>	Displays the unique identifier for the district and its description.
<b>District Type</b>	Displays the unique identifier for the district type.
<b>District Type Category</b>	Displays the category for the district type. The system-defined values include: <ul style="list-style-type: none"> <li>○ Code Enforcement</li> <li>○ Council</li> <li>○ Economic Development</li> <li>○ Zoning</li> <li>○ Inspection</li> <li>○ Plan review</li> <li>○ General</li> </ul>

4. Click the link to access the Parcel District Details page.

**Note:** You can't update the district details for a parcel from the Parcel District Details page. In order to change the district-related information for a parcel, select the chosen district and use the **Delete** button on the Parcel District 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
<b>Business Licenses</b>	Agency staff can view summary information about business licenses that are associated with a parcel or property address.	<i>Viewing Business Licenses Associated with a Parcel or Property Address</i>
<b>Cases</b>	Agency staff can view a summary of cases that are associated with a parcel or property address.	<i>Viewing Cases Associated with a Parcel or Property Address</i>
<b>Incidents</b>	Agency staff can view a summary of incidents that are associated with a parcel or property address.	<i>Viewing Incidents Associated with a Parcel or Property Address</i>
<b>Permits</b>	Agency staff can view application data and statuses for permits using the transactions page. You can also perform actions, such as paying fees and accessing detailed application information from here.	<i>Managing Transactions</i>
<b>Planning Applications</b>	Agency staff can view application data and statuses for planning applications using the	<i>Managing Transactions</i>

Page Element	Description	Additional Information
	transactions page. You can also perform actions, such as paying fees and accessing detailed application information from here.	

## 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
<b>License</b>	Displays summary information about the license.
<b>Doing Business As</b>	Displays the name by which the business is conducted, also known as DBA.
<b>Property</b>	Displays the address associated with the location of the business.
<b>Description</b>	Displays the business description.
<b>Additional Information</b>	Displays information related to the business license application, such as the name of the user who created the application, the date on which the application was created, and the name of the applicant.
<b>Fees</b>	Displays the total fees for the transaction activity, and the balance due if the total has not been paid.

7. 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.

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 Cases tab.
5. Here are some of the information on the case transactions page for a parcel or property address.

Page Element	Description
<b>Case</b>	This column displays: <ul style="list-style-type: none"> <li>○ The case ID that is assigned based on the agency's autonumbering rules.</li> <li>○ The issue type and subtype, separated by a hyphen.</li> </ul>
<b>Creation Date</b>	Displays the date on which the case was created.
<b>Location</b>	Displays the location of the issue.
<b>Issue Description</b>	Displays the description of the case
<b>Case Status</b>	Displays the status of the case, for example, Compliance, Violation, Citation, and so on.
<b>Comply By</b>	Displays the last date to ensure compliance.

6. Click a row to access the case overview page.

## Viewing Incidents Associated with a Parcel or Property Address

Agency staff can view a summary of incidents that are associated with a parcel or property address on the Transactions page, Incidents tab.

1. Select the **Parcel** or **Property Address** tile on the Agency Springboard.
2. On the Parcel or Address page, click a row to view its transactions.
3. On the Parcel or Address page, select the Transactions tab in the left panel.
4. On the Transactions page, click the Incidents tab.
5. Here are some of the information on the incidents transactions page for a parcel or Address page.
- 6.

Page Element	Description
<b>Issue ID</b>	This column displays: <ul style="list-style-type: none"> <li>○ The incident ID that is assigned based on the agency's autonumbering rules.</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ The incident type and subtype, separated by a hyphen.</li> <li>○ The incident status. Unclaimed incidents have a status of Reported.</li> <li>○ The date on which the incident was reported.</li> </ul>
<b>Location</b>	<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>
<b>Description</b>	Displays the incident description.
<b>Assigned</b>	Displays the name of the technician or code officer to whom the incident is assigned.

7. Click a row to access the incident overview page.

## Working with Property Attachments

Attachments provide supporting documentation needed by agency staff to manage parcels. You view a list of files and upload or download documents on the property information Attachments page.

### Viewing Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
2. Click **Attachments** in the navigation bar.
3. On the Attachments page, view the list of property attachments, including this information:

Page Element	Description
<b>Filename and Description</b>	View the filename and description entered by the user upon upload.
<b>File Size</b>	View the size of the attachment.
<b>Category and Subcategory</b>	View the document category and subcategory for the attachment.
<b>Actions</b>	<p>Click to select an action:</p> <ul style="list-style-type: none"> <li>○ <i>View Details</i>: Select to view detailed information about the attachment.</li> <li>○ <i>Download</i>: Select to download the attachment.</li> <li>○ <i>Delete</i>: Select to delete the attachment. You will be prompted to confirm the permanent deletion.</li> </ul>

## Adding Property Attachments

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
2. Click **Attachments** in the navigation bar.
3. Click **Add**.
4. Select the file to upload in the browser dialog box and click **Open**.  
The filename appears on the New attachment drawer.
5. On the New attachment drawer, 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](#).

6. Click the **Upload** button.

## Deleting Property Attachments

**Note:** You can delete a single attachment on the Attachments page by selecting **Delete** in the **Actions** menu.

1. Select **Parcel**, **Property Address**, or **Property Owner** on the Agency Springboard.
2. Click **Attachments** in the navigation bar.
3. Select the checkboxes next to all the attachments that you want to delete.
4. Click **Delete**. You will be prompted to confirm the permanent deletion.

## Working with Comments

This topic discusses how to use comments for parcels in the classic interface. Agency staff can view, modify, and add comments on the Comments page in the parcel record details.

You can add your own comments and work with comments in these categories:

- *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 predefined comments on the Standard comments tab.
- *Recent comments:* Select and post comments from a list of recently posted comments on the Recent comments tab.

## Viewing and Modifying Comments

1. Access the detail page for the parcel you are working with.
2. Click the **Comments** link in the left panel to view the Comments page.  
You view a list of comments in the right panel.

3. You can modify, delete, or hide a comment from public view only if it was entered by you. Click the specific comment row to open the detail view and make changes.

**Note:** Only authorized agency users can view, add or delete the comments for a parcel. Parcel comments are not displayed for public users. For more information, see [Security Details for Managing Property Information](#).

4. Click **Save**.

## Adding a New Comment

1. Access the detail page for the parcel you are working with.
2. Click the **Comments** link in the left panel to view the Comments page.
3. Click the **Add Comment** button to open the Add comment 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.

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

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

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

## Adding Favorite, Standard, and Recent Comments

1. You can post a comment that is already available in the system.

On the Add comment drawer, in the **Select comments** section you can view the three categories of comments. Click each tab to see details.

- o *Favorite:* Comments that you have marked as favorite.
- o *Standard:* All the predefined comments available.
- o *Recent:* Comments that were recently posted.

2. Select a comment and click the **Insert** icon to enter the comment.
3. If you want to mark a standard comment as your favorite, click the **Add to Favorites** icon on the comment row. The *Favorite* tab will be updated with the comment.
4. 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.
5. Click **Save** to return to the Comments page.

## 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 navigation panel.

2. Click **Apply Condition**.
3. On the Apply new condition drawer, enter or select values for the following fields:

Page Element	Description
<b>Condition Name</b>	<p>Use the lookup prompt to search and select the condition that you want to apply. The search page lists all the available conditions along with their severity, display message, and description.</p> <p>After you select a condition, the condition information is brought in as it was defined in the condition setup. You can override the default rules, priority, description, and additional information to customize the condition.</p> <p>For more information on conditions, see <i>Setting Up Property Conditions</i>.</p>
<b>Display Message</b>	Displays the message associated with the selected condition. This message is entered by your agency administrator in the setup page and cannot be updated here.
<b>Severity</b>   Lock  Hold   Notice	<p>Displays the level of severity defined for the selected condition.</p> <ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all condition rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the condition rules that apply to the condition.</li> <li>○ <i>Notice</i>: This severity functions as an alert and has no effect on operations.</li> </ul>
<b>Condition Rules</b>	<p>Select one or more rules from:</p> <ul style="list-style-type: none"> <li>○ <b>Prevent Application Progress</b></li> <li>○ <b>Prevent Workflow Advancement</b></li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <b>Prevent Issue or Final</b></li> <li>○ <b>Prevent Payment</b></li> <li>○ <b>Prevent Inspection Schedule</b></li> <li>○ <b>Prevent Inspection Result</b></li> <li>○ <b>Prevent Final Inspection</b></li> </ul> <p>Condition rules are available for selection based on:</p> <ul style="list-style-type: none"> <li>○ <i>Condition setup:</i> If the <b>Apply Condition to Transactions</b> switch is turned off, then only the <b>Prevent Application Progress</b> rule is available for selection.</li> <li>○ <i>Condition severity:</i> For a condition with a Hold severity, you can accept the default rules or select different rules. For a condition with a Lock severity, all condition rules are automatically applied and can't be changed.</li> </ul>
<b>Priority</b>	Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .
<b>Description</b>	Displays the description entered by your agency administrator in the condition setup page, but you can update the text here.
<b>Additional Information</b>	Displays additional information entered by your agency administrator in the condition setup page, but you can enter new information here.
<b>Allow Updates by Parcel Import</b>	<p>When the parcel import option is selected to resolve the parcel or address condition, the process will resolve the condition only if the <b>Allow updates by parcel import</b> switch is turned on.</p> <p>This field displays whether the switch was enabled on the Condition Setup page.</p>
<b>Include In-Process Transactions</b>	<p>Turn on this switch if you want to apply the condition to the in-process transactions related to the parcel or address.</p> <p>This option appears only if the <b>Apply Condition to Transactions</b> switch is turned on.</p> <p>You can click the <b>View Impacted Transactions</b> button to view the list of transactions where the condition will be applied.</p>
<b>Apply Condition to Transactions</b>	<p>Applies the condition to new transactions that will be associated with the selected address or parcel. You turn off the switch if you want the condition to be applied only to the transaction you're working with.</p> <p>The condition setup determines whether this switch is turned off or on by default.</p>
<b>Applied By</b>	Displays the name of the user or system that applied the condition with the date.

Page Element	Description

For more information, see [Setting Up Conditions](#).

4. Click **Apply**.

## 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 drawer, enter a description of how the condition was resolved in the **Resolution Action** field. The **Resolve conditions applied to transactions** switch is turned off 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** button to access a page that lists all impacted transactions within the selected parcel or associated with the selected address.
5. Click **Resolve**.

## 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 row for the condition you want to modify.
3. On the Edit condition drawer, 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 the **Resolved** filter option to view resolved conditions.
5. Select a row with a status of **Resolved** and the View condition drawer opens to display the details of the condition at the top, followed by an additional information about its resolution:
  - o Resolve condition applied to transactions
  - o Resolution Action
  - o Resolved By
  - o Resolved Date
6. Click **Cancel** to return to the Conditions page.

## Working with Parcel Genealogy Transactions

Agency staff can create parcel genealogy transactions to manage parcel splits, merges and lot line adjustments, and attribute management.

Agency staff can create Parcel Genealogy transactions to manage parcel splits, merges and lot line adjustments. You can use the step-by-step guide to select a genealogy transaction type and establish parent and child parcels. You can also manage attributes, such as addresses, owners, size and districts. Once a parcel genealogy transaction is established, you can view the relationship in the Genealogy tab within the Parcel page.

### Splitting Parcels

To split parcels:

1. Select the Parcel Genealogy tile on the Agency Springboard.
2. From the Transaction drop down, select **Split** and then click **Add Transaction**.
3. On the Split page, you have a guided process with steps as follows:

Steps	Description
Step 1: Select Parent Parcels	You can select parcels from the list, which have to be split.
Step 2: Select Child Parcels	You can either select child parcels that are already on the system or create new child parcels.
Step 3: Manage Addresses Step 4: Manage Owners Step 5: Manage Districts	When you create new child parcels, you can enter the parcel attributes such as addresses, owners, districts, conditions and parcel sizes. When you select child parcels that are already on the system, you will be able to view the parcel attributes but not modify them.

Steps	Description
Step 6: Manage Conditions Step 7: Manage Parcel Size	
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.

- On the Provisional Parcel Reconciliation page, select the Matched Parcels tab, to view the following fields:

Page Element	Description
<b>Parcel</b>	Lists the provisional parcels with any potential matching APNs. Matching APNs are parcels with the same street number and street name.
<b>Status</b>	The status of the parcel. The value can be Active, Retired or Provisional.
<b>Address</b>	The primary address of the parcel.
<b>City</b>	The city of the primary parcel address.
<b>Owner</b>	The name of the primary parcel owner.
<b>Map Book</b>	The recorded map book for the parcel.
<b>Page</b>	The recorded map book page for the parcel.
<b>Reconcile Parcels</b> button	Select the provisional parcel and the matching APN, and then click the <b>Reconcile</b> button to match the provisional parcel with the matching APN and retire the provisional parcel.

- Click the **Find Matching Parcel** button on a parcel row to open the **Find Matching Parcel** modal which lists a matching APN.
- In the Find Matching Parcel modal, view the following fields:

Page Element	Description
<b>Search</b>	By default, the search field shows the street number and street name of the primary address of the matched provisional parcel. The search results below appear filtered to list only those matching the search criteria.
<b>Parcel</b>	The APNs of the parcels that resulted from the search.
<b>Status</b>	The status of the parcel. The value can be Active, Retired or Provisional.
<b>Address</b>	The primary address of the parcel.
<b>Owner</b>	The name of the primary owner of the parcel.

Page Element	Description
<b>Map Book</b>	The recorded map book for the parcel.
<b>Page</b>	The recorded map book page for the parcel.
<b>Lot</b>	The lot number of the parcel in the Detail Land Information, which is part of the APN.

5. Select the 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
<b>Search</b>	You can search for a provisional parcel using its primary address.
<b>Provisional Number</b>	The temporary parcel number assigned to newly created provisional parcels. Click the link to view the details of the parcel in a new window.
<b>Creation Date</b>	The date on which the provisional parcel was created.
<b>Status</b>	The status of the parcel. The value can be Active, Retired or Provisional.
<b>Address</b>	The primary address of the parcel.
<b>Owner</b>	The name of the primary parcel owner.
<b>Map Book</b>	The recorded map book for the parcel.
<b>Page</b>	The recorded map book page for the parcel.
<b>Lot</b>	The lot number of the parcel in the Detail Land Information, which is part of the APN.

3. 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
<b>Search</b>	By default, the search field shows the street number and street name of the primary address of the unmatched provisional parcel. The search results below appear filtered to list only those matching the search criteria.
<b>Parcel</b>	The APNs of the parcels that resulted from the search.
<b>Status</b>	The status of the parcel. The value can be Active, Retired or Provisional.
<b>Address</b>	The primary address of the parcel.
<b>Owner</b>	The name of the primary owner of the parcel.
<b>Map Book</b>	The recorded map book for the parcel.
<b>Page</b>	The recorded map book page for the parcel.
<b>Lot</b>	The lot number of the parcel in the Detail Land Information, which is part of the APN.

- 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
<b>Search</b>	By default, the search field shows the street number and street name of the primary address of the unmatched provisional parcel. The search results below appears filtered to list only those matching the search criteria.
<b>Provisional Number</b>	View the provisional number of the parcel. Click the link to view the details of the parcel in a new window.

Page Element	Description
<b>APN</b>	View the APN of the parcel. Click the link to view the details of the parcel in a new window.
<b>Address</b>	The primary address of the parcel.
<b>Owner</b>	The name of the primary owner of the parcel.
<b>Map Book</b>	The recorded map book for the parcel.
<b>Page</b>	The recorded map book page for the parcel.
<b>Lot</b>	The lot number of the parcel in the Detail Land Information, which is part of the APN.
<b>Reconciled By</b>	The user id of the person who reconciled the parcels.
<b>Date Reconciled</b>	The date on which the provisional parcel was reconciled with its APN.
<b>Undo Reconciliation</b> button	To disassociate parcels which were incorrectly reconciled.

## Undoing a Reconciliation

To undo a reconciliation:

1. Select Parcel Reconciliation on the Agency Springboard.
2. Click the **Reconciliation History** tab.
3. Click the **Undo Reconciliation** button and confirm to revert the reconciliation.



# 15 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.

Agency staff with the contractor administration duty role can update contractor license information, regardless of integration with an external licensing body.

Information Type	Contractor List Only	Contractor List and External Source
All	<p><b>Note:</b> The agency limits the contractor selection to the agency-maintained contractor list.</p> <p>The agency allows applicants to select contractor licenses from the agency-maintained contractor records list only. In</p>	<p><b>Note:</b> The agency doesn't limit the contractor selection to the agency's contractor list.</p> <p>The agency allows applicants to select contractor licenses from the contractor records list or an integrated external source. The</p>

Information Type	Contractor List Only	Contractor List and External Source
	<p>this case, applicants can search for and select licenses from the contractor records only and not from the external licensing body.</p> <p>Agency staff with appropriate permissions manually enter or update license information in the contractor list. Contractor records can also be loaded from an external source, but license selection in the application is still limited to licenses in the list.</p> <p>Applicants who are contractors or their authorized agents can search for and select 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>validation process checks your contractor records first, and if you don't yet have a record of the license, the process retrieves information from the licensing body.</p> <p>Agency staff and applicants perform a real-time license number validation that retrieves license details from the licensing body. For most users, the license detail fields are read-only, and refreshing is the only way to update the information. However, agency staff with the contractor administration duty role 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><b>Note:</b> The license status is independent of contractor approval. For example, a license can have an active status but is disabled for use because it isn't approved. Licenses must be enabled to be entered in an application.</p> <p>Applicants can see the internal status if they bring details from your contractor records into an application. They can't modify the status.</p>	<p>The license validation process retrieves a <i>source status</i> from the external licensing body. This status is read-only for all users, and can only be updated by refreshing 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>License types must be set up for the contractor licenses.</p> <p>External licensing bodies may not provide a license type for the contractor licenses, but the <b>License Type</b> field is part of the key</p>

Information Type	Contractor List Only	Contractor List and External Source
	<p>Applicants must select this value as the license type when they enter contractor license information in an application.</p> <p>Oracle recommends creating a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.</p>	<p>on the contractor license record and must have a value. Oracle recommends setting up the <b>License Type</b> field with a value such as <i>LICENSE</i> for use when retrieving and loading licenses from integrations with an external licensing body. If no license type value is assigned by the licensing body, the system can use the <i>LICENSE</i> value in the <b>License Type</b> field on the contractor license record.</p> <p>Use license classifications to track the specific types of work that a contractor is licensed to perform.</p>

## 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 Contractors page to view a list of licenses and summary information about each contractor license.

From here, you can manually create a contractor license record. You can also take various actions for each contractor, such as accessing license details, refreshing contractor information, or deleting the license record.

Select **Contractors** on the Permitting and Licensing home page to open the Contractors list page.

Let's take a look at the summary information and actions you can take on the Contractors list page as displayed in the Redwood Experience interface:

You can review this information for each contractor:

Page Element	Description
<b>Business Name</b>	Displays the name of the contractor business.
<b>Owner Name</b>	Displays the owner name.
<b>License Number</b>	Displays the contractor license number.
<b>License Status</b>	Displays the contractor license status. For example, Active.
<b>Conditions</b>	Indicates that at least one condition is applied to the contractor license. The condition link displays the most severe condition. Click the link to see a list of all applicable conditions on the <b>Condition summary</b> drawer, including the condition name, severity, description, when the condition was applied and more.

Page Element	Description
	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. A Notice condition shows there's an issue but no restrictions. For more information, see <a href="#">Applying Conditions to Contractor Licenses</a> .
<b>License Type</b>	Displays the license type. For example, electrical contractor, plumbing contractor, general contractor, and so on.  The agency sets up contractor license types on the Contractor License Options page. For more information, see <a href="#">Setting Up Contractor License Options</a> .
<b>Issue Date and Expire Date</b>	Displays the license issue date (or reissue date, if one exists), and the license expiration date.
<b>Address, City, State, and Postal Code</b>	Displays the address fields of the contractor business.
<b>Phone</b>	Displays the phone number of the contractor business.
<b>Email</b>	Displays the email address of the contractor business.
<b>Last Refreshed</b>	Displays the date that license information was most recently synchronized with the external licensing body's record. This field is relevant only if the integration is active.
<b>Used in Application</b>	Displays <i>Yes</i> or <i>No</i> to indicate whether this contractor is associated with any permit or planning applications.  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.
<b>Contractor Approved</b>	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 indicator on the license in the application details indicates that the license is not approved.  This option doesn't affect the license status. For example, you can change an active license to not approved for business purposes.

Use the three-dot **Actions** menu for each contractor row to perform these actions:

Action	Description
<b>View Details</b>	Select this action to access the contractor license detail pages, where you can update the contractor information, including contractor approval.  You can also select the row of the contractor license to access the license detail pages.
<b>Refresh</b>	Select to retrieve and save updated license information from an external licensing body. This action is available only when integration with the licensing body is enabled.

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

## 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](#). For information about adding contractor licenses to business licenses, see [Working with Contractors and Agents](#).

Here's how to manually add a contractor license to the agency's contractor list:

1. Access the Contractors page.
2. Click the **+ Add** button.

The **New Contractor** page displays the following the read-only information:

Page Element	Description
License Source	Identifies the license's status coming from the licensing body and brought in through integration with the external source.  See <a href="#">Setting Up Contractor License Options</a> .

3. In the **License Number** field, enter the license number that was issued by the licensing body.
4. Turn on the **Contractor Approved** switch to indicate that this license is available for use in applications.
5. Whether or not your agency integrates with an external licensing body, enter this information:

Page Element	Description
License Type	Select the license type for contractor licenses. Although your agency can create multiple license types as part of the contractor options, Oracle recommends using a single license type for contractors, and using license classifications to track the specific types of work that a contractor is licensed to perform.  Oracle recommends adding a license type with the value <i>LICENSE</i> to the <b>License Types</b> grid in the agency-level contractor license options. That way, if your system is integrated with an

Page Element	Description
	external source and the integration doesn't return license types, then <i>LICENSE</i> appears as the default value on the contractor license. For more information, see <a href="#">Setting Up Contractor License Options</a> .
<b>License Status</b>	<p>Select the license status. Values include Active, Canceled, Expired, Suspended, Other, Revoked, and Inactive.</p> <p>This field is available even when integration is active, but the initial value is based on the status from the external licensing body and the contractor options that map licensing body statuses to internal statuses.</p> <p>When you're setting up the status rules in the contractor license options, you can indicate which statuses allow an application to be submitted. For more information, see <a href="#">Setting Up Contractor License Options</a>.</p>

6. If you use integration to get information from an external licensing body:

a. Click **Import**.

This button is visible only when integration is enabled. The import 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 isn't mapped to an agency status, the default agency status is *Other*.

7. Enter, update, or review information about the license and business.

You can enter or update data if you do not use integration. If integration is active, the fields are read-only.

License information includes these fields:

Page Element	Description
<b>Issue Date</b>	The date that the license was originally issued.
<b>Reissue Date</b>	The date that the license was reissued after a period of inactivity or after it expired.
<b>Expire Date</b>	The date that the license expired or is due to expire.

Page Element	Description

Business information includes these fields:

Page Element	Description
<b>Business Name</b>	The name of the contractor business.
<b>Owner Name</b>	The owner of the contractor business.
<b>Ownership Type</b>	The ownership structure for the business, such as Corporation, Sole Proprietor, or Partnership.
<b>Email</b>	The email address for the business.
<b>Country, Phone, and Extension</b>	The country prefix, phone number, and extension, if any, for the business.
<b>Country/Region</b>	The country or region where the business has its address.
<b>Address Line 1 and Address Line 2</b>	The business street address. Only one address line is required.
<b>City, State, and Postal Code</b>	The city, state, and postal code of the business address.  Address columns can vary, based on agency setup. For example, the agency may include <b>County</b> in the address fields.

8. Save the form to enter or update 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. For more information, see [Setting Up Contractor License Sections](#).

If the agency displays all available information using the default labels, these sections appear:

Section Name	Description
<b>Classifications</b>	License classifications indicate the type of work that the contractor is licensed to perform.  This grid lists a <b>Code</b> and a <b>Description</b> for each classification.

Section Name	Description
	If integration is not active and the fields are editable, selecting a code displays the associated description.
<b>Contractor Bond</b>	Contractor bond information includes the <b>Company Name</b> (the bond issuer), <b>Policy Number</b> , <b>Amount</b> , <b>Effective Date</b> , and <b>Cancellation Date</b> .
<b>Certification</b>	Information for certification includes a <b>Qualifier Name</b> (the name of the qualifying individual on the contractor license bond) and the same fields that appear for contractor bonds.
<b>Insurances</b>	Insurance information includes the <b>Insurance Type</b> (such as Workers' Compensation), <b>Company Name</b> , <b>Policy Number</b> , <b>Exempt</b> status, <b>Effective Date</b> , <b>Expiration Date</b> , <b>Cancellation Date</b> , and <b>Suspend Date</b> .
<b>Attachments</b>	<p>Supporting documents can be added after license information has been saved. Attachment information includes the uploaded document, <b>Document Category</b>, and <b>Document Subcategory</b>.</p> <p>When you modify attachments in the contractor record details, you can add a reference to a person associated with the attachment in the <b>Assigned To</b> field.</p> <p>You can modify or delete an attachment only if you uploaded it.</p>

9. To clear all information and start over, click the **Clear** button and go back to the step where you enter a license number.
10. Click **Save**.

## Managing Contractor License Details

Agency staff can modify the details for an individual contractor license depending on the assigned permissions. Staff can also manage transactions, contacts, attachments, comments, and conditions.

To navigate to the contractor license details, start by accessing the Contractors list page. One way to do that is to select the **Contractors** tile on the Agency Springboard. Or, in the Ask Oracle search on the Oracle home, enter "Contractors for Permitting and Licensing." Select the link to open the Contractors list page.

### Modifying License Details

Agency staff with a contractor duty role (PSC Contractor Master Management or PSC Contractor Master Administration) can update contractor license information, regardless of integration with an external licensing body. Only agency staff with the Administration role have the privileges needed to delete a license from the contractor records. For more information, see [Security Details for Managing Contractor Information](#).

Here's how to modify the license information for a contractor:

1. On the Contractors list page, select the row of the contractor license that you want to update.
2. On the License Details page, go to the **Contractor and Business** section.
3. Click the **Import** button to retrieve and save updated license information from an external licensing body when a license is new. Click **Refresh** after a license has already been saved. This action is available only when integration with the licensing body is enabled.
4. Click the **Update** button to manually update the details on the **Contractor and business details** drawer.

Here are the contractor and business details that can be updated:

Page Element	Description
<b>Contractor Approved</b>	Turn on the switch to indicate that this license is available for use in applications.
<b>License Type</b>	Select a contractor license type. For example, general building or electrical contractor.
<b>License Status</b>	Select a contractor license status. For example, Active, Canceled, Expired, Suspended, Other, Revoked, or Inactive.
<b>Issue Date</b> <b>Reissue Date</b> <b>Expire Date</b>	Enter the dates when the contractor license was issued, reissued, and expired.
<b>Business Name and Owner Name</b>	Enter the contractor business and owner names.
<b>Ownership Type</b>	Select the type of business ownership. For example, corporate or joint tenancy.
Contact information	Enter the email and address information for the contractor business.

5. Click **Update** to save your changes and close the drawer.
6. Add or update license details in sections set up by the agency to collect contractor license information:
  - o **Classifications**
  - o **Contractor Bond**
  - o **Certification**
  - o **Insurances**

For more information, see [Setting Up Contractor License Sections](#).

## Viewing Related Transactions

When the contractor license is used on transactions, you can view consolidated lists here. For more information, see [Viewing Contractor License Use](#).

## Working with Contacts

Click the Contacts tab in the left panel to open the Contacts page.

Delivered filter chips help you find contacts in the list. You can apply filter chips in the search field to find **Active** contacts, the contact who is the **License Holder**, **Unregistered Contacts**, as well as a filter to find contacts by **Type**.

For information about working with contractor contacts, see [Adding Contractor License Contacts](#).

## Working with Attachments

Click the Attachments tab in the left panel to open the Attachments page. For more information, see [Working with Application 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.

Here's how to work with attachments in the contractor license details:

1. On the Attachments page, click **+ Add Attachments** to upload the file.
2. Select the file and add a description, document category, and document subcategory on the **New attachment** drawer.

If there are agents for the contractor associated with this contractor license, you can reference them in the **Assigned To** field.

Click **Upload**.

3. Click the three-dot **Actions** button and select an action. You can modify or delete an attachment only if you uploaded it.
  - o **View Details** - Select to view or update details. You can update the description, document category, and referenced person.
  - o **Download** - Select to download the attachment.
  - o **Preview** - Select to view a preview image of the attachment.
  - o **Delete** - Select to delete the attachment.

## Adding Comments

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. For more information, see [Working with Comments](#) and [Managing 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.

## 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 an *Active* status can be selected as the contractor's contact on an intake form.

Only system administrators can delete contacts from the license details.

Navigate to the agency's Contractors list page by entering "Contractors for Permitting and Licensing" in the **Ask Oracle** search field on the Fusion Application home page and clicking the link. On the Contractors list page, select the row of the contractor license that you want to modify.

## Manually Adding License Contacts

Here's how to manually add contacts who are already registered in the system to the contractor license details:

1. In the contractor license details, click the **Contacts** tab in the left-panel navigation to open the Contacts page.
2. On the Contacts page, click the **Add** button.
3. On the **Add contact** drawer, click the drop-down list to select from registered users.
4. Select the contact type from the **Type** drop-down list. Choose from *Contractor* or *Authorized Agent*.
5. Click **Save**.

Select a contact or click the **View Details** action in the Contacts grid in the contractor license details to update the verification status and contact information on the details drawer. 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 the **Register New Contact** button.

2. On the **New contact** drawer, fill out the account details with contact information and select the contractor type from the drop-down list. Choose from *Contractor* or *Authorized Agent*.

Turn on the switch to hide the contact information from public view.

For more information, see *The Public User Registration Process*.

3. Click **Register**.
4. 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.

In the Contacts grid, contacts added using the batch load process are identified by Yes in the **Unregistered Contact** column.

Here's how to update license contacts that were loaded from a file in the license details:

In the **Actions** column, click the 3-dot actions button to open the menu. You can select one of these options:

- **Replace with Existing User** - Click to select a registered user to replace the contact. On the **Replace contact with existing user** drawer, select a registered user from the drop-down list. You must also select a contact type for the replacement, then click **Save**.
- **Register User** - Click to register the contact as a new user with a unique email address. Fill out the new registration for the contact by entering account details, then click **Register**.

To manually update a contact in the Contacts grid, click the row of the contact or select the **View Details** action. On the **Contact details** drawer, you can make these updates:

- Update the contact information, including the name, verification status, contact type, email address, address, and phone.
- Use the **Active** switch to indicate whether the contact is in use or inactive.
- Turn on the **License Holder** switch to indicate whether the contact is the contractor license holder.

Click **Save**.

## Viewing Contractor License Use

The Transactions page in the contractor details provides a list of the transactions where the contractor is used, including permits, planning applications, business licenses, and business license transactions.

Navigate to the agency's Contractors list page by entering "Contractors for Permitting and Licensing" in the **Ask Oracle** search on the Oracle home, and click the link. On the Contractors list page, select the row of the contractor license that you want to modify.

Agency staff can view all transactions associated with the contractor license in the agency's license details like this:

1. In the contractor license details, click the **Transactions** tab in the left-panel navigation to open the Transactions page.
2. View the transactions listed by type on these tabs. The transaction information displayed depends on the type of transaction.

Page Element	Description
<p><b>Permits and Planning Applications</b> tabs</p>	<p>Review information about an application:</p> <ul style="list-style-type: none"> <li>○ <b>Application ID</b></li> <li>○ <b>Application Type</b></li> <li>○ <b>Status</b></li> <li>○ <b>Submitted On</b></li> <li>○ <b>In Use</b></li> <li>○ <b>Conditions</b> - Click the link to view a summary of applied conditions.</li> <li>○ <b>Property</b> (street address) and <b>City</b></li> <li>○ <b>Description</b></li> </ul> <p>Remove the <b>In Progress Applications</b> filter in the Ask Oracle search field to view applications that are no longer in progress, such as completed or withdrawn.</p>
<p><b>Business Licenses</b> tab</p>	<p>Review information about a business license:</p> <ul style="list-style-type: none"> <li>○ <b>License</b> - Agency-assigned license number.</li> <li>○ <b>Last Updated</b> - Date when the license was last updated.</li> <li>○ <b>License Type</b> - For example, general contractor or electrical contractor.</li> <li>○ <b>Status</b></li> <li>○ <b>Conditions</b> - Click the link to view a summary of applied conditions.</li> <li>○ <b>Expiration Date</b> - Date when the license expires.</li> <li>○ <b>Business Name</b></li> <li>○ <b>Description</b></li> </ul> <p>Update the <b>Status</b> filter in the Ask Oracle search field to view business licenses that are active, inactive, or expired.</p>
<p><b>Business License Transactions</b> tab</p>	<p>Review information about an application:</p> <ul style="list-style-type: none"> <li>○ <b>Application ID</b></li> <li>○ <b>Application Type</b></li> <li>○ <b>Status</b></li> <li>○ <b>Submitted On</b></li> <li>○ <b>Conditions</b> - Click the link to view a summary of applied conditions.</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <b>Activity</b> - For example, an origination, amendment, or renewal application.</li> <li>○ <b>Current Transaction</b> - Indicates whether the transaction is the current activity.</li> <li>○ <b>Business Name</b></li> <li>○ <b>Description</b></li> </ul> <p>Remove the <b>In Progress Applications</b> filter in the Ask Oracle search field to view applications that are no longer in progress, such as completed or withdrawn.</p>

3. Click the license or application link in each row to open the corresponding license or application details.

## Managing Authorized Agents

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

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

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

To manage authorized agents for a license:

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

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

Page Element	Description
<b>Type</b>	<p>Displays the relationship this person has to the contractor license:</p> <ul style="list-style-type: none"> <li>○ <i>Authorized Agent</i>: A person who has shown valid documentation for using this license.</li> <li>○ <i>Contractor</i>: A person who is a contractor operating under this license.</li> </ul> <p><b>Note:</b> Only active contractors can be selected as a contractor license contact on the permit or planning application intake form.</p>
<b>Active</b>	<p>Displays <i>Yes</i> if the agent has been verified.</p> <p>Displays <i>No</i> if verification is pending or the verification has failed.</p>

5. Click the row for an authorized agent to access the contact details.
6. In addition to the contact information, you can update these fields on the Contact Details page. You can update everything except the agent's name.

Page Element	Description
<b>Verification Status</b>	<p>Select an option:</p> <ul style="list-style-type: none"> <li>○ <i>Verified</i></li> <li>○ <i>Pending verification</i></li> <li>○ <i>Verification failed</i></li> </ul> <p>The default status for an agent who submits an application is <i>Pending verification</i>. When you manually add an agent, the status is <i>Verified</i> and the <b>Active</b> checkbox is available.</p>
<b>License Holder</b>	<p>Select the checkbox to indicate that this authorized agent is the license holder of the contractor license.</p>
<b>Active</b>	<p>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 <b>Active</b> checkbox is automatically deselected.</p>
<b>Business</b>	<p>Enter the agent's business name.</p>
<b>Type</b>	<p>Select <i>Authorized Agent</i> or <i>Contractor</i> to indicate how this contact person is associated with the license.</p>

7. Click **Save**.

## Applying Conditions to Contractor Licenses

Agency staff can apply conditions to contractor licenses to indicate an issue exists and limit permit or planning application activity when the contractor license is used. For example, a condition applied to a contractor license may prevent the submittal of an application where the license is selected or an inspection can't be requested for a permit associated with the license. 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 displays 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](#).

One way to access the Conditions page for a contractor license is to enter Contractors for Permitting and Licensing. Select the row for the contractor license you're working with.

### Adding a Condition to a Contractor License

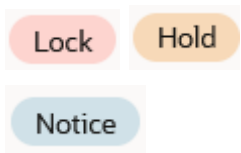
1. Click **Conditions** in the left navigation panel.
2. On the Conditions page, view the list of applied and resolved conditions. Click the **Apply Condition** button.
3. On the **Apply new condition** drawer, select a condition name from the drop-down list.

After you select a condition, the condition information is brought in as it was defined in the condition setup. You can override the default rules, priority, description, and additional information to customize the condition.

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

4. Let's take a look at the fields you can review for the selected condition:

Page Element	Description
Display Message	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.
Severity	<p>Displays the level of severity defined for the selected condition.</p> <ul style="list-style-type: none"> <li>○ <i>Lock</i>: This severity suspends all operations and selects all condition rules for the condition.</li> <li>○ <i>Hold</i>: This severity enables agency staff to select the condition rules that apply to the condition.</li> </ul>

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Notice:</i> This severity functions as an alert and has no effect on operations.</li> </ul>

5. Accept the default or update the **Condition Rules** in the Details section. Select one or more of the available rules for contractor license conditions:

- Prevent Application Progress
- Prevent Workflow Advancement
- Prevent Issue or Final
- Prevent Payment
- Prevent Inspection Schedule
- Prevent Inspection Result
- Prevent Final Inspection

The Prevent Application Progress rule is only applicable to conditions on persons, parcels, property addresses, business licenses, and contractor licenses. The Prevent Workflow Advancement rule is only available when the **Apply Condition to Transactions** switch is turned on.

**Note:** 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.

6. Accept the default or update these fields:

Page Element	Description
<b>Priority</b>	Select a priority for the condition. Values are <i>High</i> , <i>Medium</i> , and <i>Low</i> .
<b>Description</b>	Displays the description entered by your agency administrator in the condition setup page, but you can update the text here.
<b>Additional Information</b>	Displays additional information entered by your agency administrator in the condition setup page, but you can enter new information here.
<b>Apply Condition to Transactions</b>	<p>Applies the condition to new applications or transactions that will be associated with the selected license. Turn off the switch if you want the condition to be applied only to the license you're working with.</p> <p>The condition setup determines whether this switch is turned off or on by default.</p>
<b>Include in-process transactions</b>	Turn on this switch if you want to apply the condition to transactions already in process that are associated with this license.

Page Element	Description
	<p>This option appears only if the <b>Apply Condition to Transactions</b> switch is turned on.</p> <p>You can click the <b>View Impacted Transactions</b> button to view the list of transactions where the condition will be applied.</p>

7. Click **Apply**.

## Resolving a Condition

You can manually resolve a condition that you applied to a contractor license like this:

**Note:** For information about automatically resolving conditions, see *Working with Contractor Expiration*.

1. Access the Conditions page for the license you are working with.
2. Click the **Resolve** button for the condition you want to resolve.
3. On the **Resolve condition** drawer, enter a description of how the condition was resolved in the **Resolution Action** field.
4. Turn off the **Resolve conditions applied to transactions** switch if you want to resolve this condition alone, without affecting the transactions associated with the license. This switch appears only if the condition was applied with the **Apply Condition to Transactions** switch turned on.

Turn on the **Resolve conditions applied to transactions** switch to resolve the condition that was initially applied automatically to the transactions when this condition was created.

5. Use the **View Impacted Transactions** link to access a page that lists all impacted business license transactions or applications.
6. Click the **Resolve** button.

## Modifying a Condition

You can modify a condition that you applied to a contractor license. Any changes you make won't be copied over to the existing transactions. You can't modify a resolved condition.

On the Conditions page for the contractor license you're working with, click the condition row. On the **Condition details** drawer, you can update the rules, priority, description, and additional information for a condition with a Hold severity. For conditions with a Lock or Notice severity, you can update the priority, description, and additional information. If you enable the **Apply Condition to Transactions** switch, then the changes you save will be applied to new transactions. 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

On the Conditions page for the contractor license you're working with, click the **Resolved** filter to view the resolved conditions. Click a resolved condition row. On the drawer, you can view the details of the condition and its resolution, including this information:

- Resolve condition applied to transactions
- Resolution Action
- Resolved Date
- Resolved By

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

## 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](#).

# 16 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
<b>Transaction Reference</b> and <b>Transaction Reference ID</b>	Displays the key name and value of the record for the transaction/  Click the reference name or ID to view the details. The Error Log Details page displays the event name and template name used in the communication.
<b>Error Reference</b>	Displays a system-generated reference number for the error.
<b>Channel Type</b>	Identifies the channel type used by the communication. For example, web form, email, notification, or text.
<b>Error Text</b>	Displays the error captured by the system. The message may identify the source of the error such as a problem with a template.
<b>Created By</b> and <b>Created On</b>	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 **Delivery failure** icon appears on both the **Communication Center, Emails** tab and also on the **Communication** tab for an application. Agency staff can then review and take action from either place.

To run 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 tab in the transaction detail pages. For a specific business license, permit, or planning application, select the Communications menu item in the left-panel navigation. For more information, see [Working with Communications](#).

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

You can add alerts in the Communication Center. 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](#).

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 **New alert** 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
<b>Enabled</b>	Turn on the switch to activate the alert.
<b>Remarks</b>	Enter any reference information for agency use. These remarks are not included in the displayed alert.
<b>To</b>	<p>Enter a value for the target recipients of the alert:</p> <ul style="list-style-type: none"> <li>○ Individual Registered Users Enter comma-separated user IDs for the registered users, for example, <b>SYSTEM_ADMIN</b>, <b>BUSINESS_ANALYST</b>.</li> <li>○ All Registered Users Enter this attribute: <b>#{User}</b>. The application displays the alert when the registered user logs in.</li> <li>○ All Anonymous Users Enter this attribute: <b>#{Anonymous}</b>.</li> <li>○ A Combination of Users Enter a string including comma-separated user IDs for the registered users, <b>#{User}</b> for all registered users, and <b>#{Anonymous}</b> for all anonymous users.</li> </ul>
<b>Message Body</b>	Enter the main body of the alert using plain, unformatted text.
<b>Insert in Message Body</b>	<p>These fields enable you to insert variables for attributes into your message. You select the field and the attribute that you want to insert in that field, and click <b>Insert</b> to enter a variable for that attribute.</p> <p>For example, if you select the <i>Body</i> field and the <i>Current date</i> attribute, and click <b>Insert</b>, the <code>[ [CURRENTDATE] ]</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 <a href="#">Using Attributes in Communication Templates</a>.</p>

4. Click **Save**.

## Modifying Ad Hoc Alerts

1. Select **Communication Center** in the Navigator, or click **Communication Center** on the agency springboard.
2. Click **Actions** on the Alert you want to modify.
3. On the Update Alert Details page you can update the alert field values.
4. Click **Submit**.

## Deleting Ad Hoc Alerts



1. Select **Communication Center** in the Navigator, or click **Communication Center** on the Agency Springboard.
2. Click **Actions** on the Alert you want to delete.

3. 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 **New ad hoc message** page, enter values for the following fields:

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

Page Elements	Definition
	<p>For emails, enter comma-separated email addresses for the recipients, for example, <code>john.doe@example.com</code>.</p> <p>Enter comma-separated phone numbers for text messages.</p>
<p><b>Cc and Bcc</b></p>	<p>Enter the email addresses of the people or organizations that you want to receive a copy or blind copy of the message.</p> <p><b>Note:</b> These fields appear only for the <i>Email</i> and <i>Emails and Notifications</i> channel types.</p>
<p><b>From</b></p> 	<p>Enter the sender address of the person or organization who is sending the generated message.</p> <p>The Agency sender address used here is configured in the Agency setup. For more information, see <a href="#">Setting Up Agency-Level Email</a>.</p> <p>For text messages, select the phone number of the person or organization who is sending the generated text message from the drop-down list. The available numbers come from a third-party messaging service.</p> <p><b>Note:</b> Enter email addresses for the <i>Email</i> and <i>Emails and Notifications</i> channel types, user IDs for the <i>Emails and Notifications</i> and <i>Notification</i> channel types, and phone numbers for the <i>Text</i> channel type.</p>
<p><b>Subject</b></p> 	<p>Enter a brief description of the purpose and content of the message.</p> <p><b>Note:</b> This field does not appear for the <i>Text</i> channel type.</p>
<p><b>Message Body</b></p>	<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>

Page Elements	Definition
	<p><b>Note:</b> When you enter a website address as a text or an image link, the system verifies if it is present in the safe domains list. If not, add it as a safe domain. Only links of safe domains can be included in the rich text editor. See <a href="#">Setting Up Safe Domains</a>.</p>
<p><b>Insert in Message Body</b></p>	<p>These fields enable you to insert variables for attributes into your message. You select the field and the attribute that you want to insert in that field, and click <b>Insert</b> to enter a variable for that attribute.</p> <p>For example, if you select the <i>Body</i> field and the <i>Current date</i> attribute, and click <b>Insert</b>, the [ [CURRENTDATE] ] 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 <a href="#">Using Attributes in Communication Templates</a>.</p>

4. Click **Send**.

## Viewing Ad Hoc Emails, Notifications, and Texts

1. Select **Communication Center** on the agency springboard.
2. For each row on the **Emails, Notifications, and Texts** tab of the Communication Center page you can:
  - o Click the **Actions** icon to resend or forward the message.

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

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

- o Click the **View More Details** button to view detailed information about the message.

# 17 Working with Maps

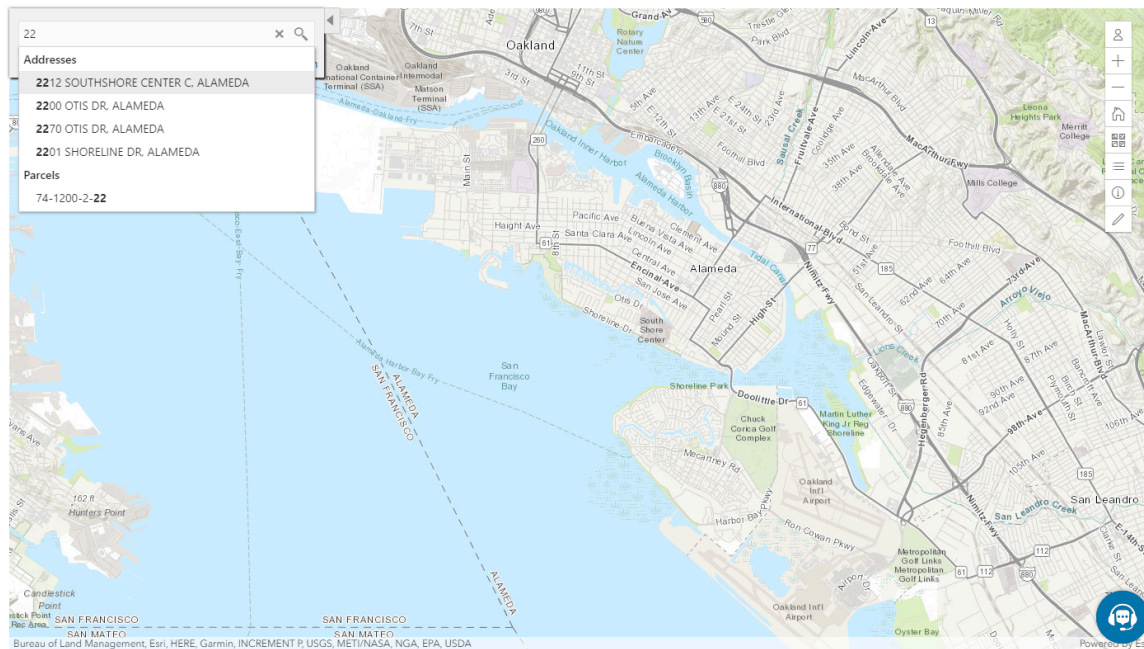
## Overview of Delivered Maps

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.

If your agency's map server is deployed on a local network, you might be prompted by your browser to grant access to a map.

This example shows the main map that agency staff uses to see properties and transactions.



The following tables describe the delivered maps in the Oracle Permitting and Licensing system.

### Main Maps

This table lists the main maps that display the agency's business licenses, permits, planning applications, and projects. There are separate maps for different users. For more information, see *Using the Main Map and Explore Your City Map*.

Map Name	Users	Navigation	Usage
Agency main map	Agency staff	Click the Map icon in the page header, then click <b>Main Map</b> in the drop-down menu that appears.	<ul style="list-style-type: none"> <li>View existing applications and projects.</li> <li>Search and select properties.</li> <li>View transactions for a selected property.</li> <li>Start new applications for selected properties.</li> <li>Access an interactive guide for selecting application types.</li> </ul>
Guest/anonymous user map	Anonymous public users	Guest users click the <b>Explore Your City</b> tile on the landing page.	<ul style="list-style-type: none"> <li>View existing applications and projects.</li> <li>Search and select properties.</li> <li>View transactions for a selected property.</li> <li>Access an interactive guide for selecting application types.</li> </ul> <p>An anonymous user who attempts to start an application is required to register or sign in first.</p>
Registered public user map	Registered public users	Registered public users click the <b>Explore Your City</b> tile on the landing page.	<ul style="list-style-type: none"> <li>View existing applications and projects.</li> <li>Search and select properties.</li> <li>View transactions for a selected property, and filter transactions so that only the user's own items appear on the map.</li> <li>Start new applications for selected properties.</li> <li>Access an interactive guide for selecting application types.</li> </ul>

## Additional Maps for Applications

This table lists additional maps that support applications:

Map Name	Users	Navigation	Usage
Application intake	Agency staff Registered public users	Access the <b>Property</b> section of a new or submitted application, then click the <b>Map View</b> icon.	<p>Choose properties and other GIS objects to associate with the application.</p> <p>See <i>Working with Property Information</i> when viewing maps</p>

Map Name	Users	Navigation	Usage
			in the Redwood Experience user interface.
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"> <li>Click the Map icon in the page header, then click <b>Public Notification</b> in the drop-down menu that appears.</li> <li>From the Planning Application detail page, select a hearing where the schedule is final, then select the <b>Actions</b> button and choose <b>Generate Notifications</b> from the menu that appears.</li> </ul>	<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 <b>Map View</b> icon.	View the locations of incidents that appear on the selected worklist tab.  See <i>Using the Code Technician Worklist</i> .
Code enforcement issue intake	Registered and anonymous public users	Follow the guided process for reporting an issue until you reach the page where you enter the issue location.	Identify the location of an issue that is being reported.  See <i>Reporting Issues</i> .
Mobile code enforcement inspections	Agency staff	When reporting a new violation, click the <b>Location of the incident</b> option.	Identify the location of a violation that is being reported by an inspector who is using the mobile inspection application.  See <i>Accessing the Code Officer Application</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.	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.  If the application is not associated with a location, the map displays the initial extent that is defined on the map profile.

You can set up one transaction header map for everyone or separate transaction header maps for public users and agency users. For more information, see [Implementing Delivered Maps](#).

## Using the Map Toolbar

The general toolbar for maps has tools that relate to the map itself, without regard to specific transactions. The map toolbar may also include widgets to add sketches and print map displays, depending on the agency's configuration.

**Note:** Use map profiles to configure which tools are available on a map. For information on configuring which tools appear, see [Setting Up Map Profiles](#).

These tools appear on the main toolbar:











Image	Name	Configuration	Description
	Switch Map Profile	This icon appears if multiple profiles exist for the map.	Click to select a map profile. Map profiles control the appearance of the map as well as the availability of other toolbar options.  When you click this icon, a list of map profiles appears. The list displays the profile name and a thumbnail image of the map that illustrates its general appearance.
	Zoom In and Zoom Out	Use the <b>Enable Zoom</b> switch on the map profile.	Use these tools to zoom in or out.  You can also double-click a map location to zoom in.
	Show Default Map View	Use the <b>Enable Default Map View</b> switch on the map profile.	Click to restore the map to its default (home) display area.

Image	Name	Configuration	Description
	Select Base Map	Use the <b>Enable Base Map Gallery</b> switch on the map profile.	Click to display a pop-up window for selecting a map type such as <i>Streets</i> or <i>Topographic</i> .
	Select Layers	Use the <b>Enable Map Layers</b> switch on the map profile.	Click to display a pop-up menu for changing the visibility of various map layers. Examples of layers include the parcel layer and address layer provided by the map service. Click the <b>Sketch</b> button to show or hide sketches that have been drawn on the map.
	Show Attribution (for maps in page headers)	This toolbar button is not configurable. Some maps have this button, while other maps, such as Explore Your City, display attribution information across the bottom of the map page.	Click to display a pop-up window that identifies the third-party map sources.
	Identify GIS Information (for maps that are not in page headers)	This tool appears if the <b>Enable Map Layers</b> switch is on and the map service URL for the profile is configured to allow the display of object details on the map.	Click to enable the display of object details for map objects (such as parcels) that you click. Details appear in a pop-up window. To stop displaying object details, click the button again to turn off the option to identify GIS information.  The map profile settings for <b>Enable Window Detail Docking</b> and <b>Detail Window Dock Position</b> control where the object detail window appears. However, on mobile devices, the detail window always appears at the bottom of the screen..
	Show Selection Tools or Hide Selection Tools	Use the <b>Enable Selection Tools</b> switch on the map profile.	Click to show or hide a toolbar with drawing tools. Use the drawing tools to select parcels on the map using a point, polyline, or polygon.
	Show Sketch Tools or Hide Sketch Tools	Use the <b>Show Sketch</b> switch on the map profile to enable the sketch widget.	Click to show or hide a toolbar with sketch tools. Use the sketch tools to draw a point, polyline, polygon, rectangle, or circle. See "Drawing on Maps" in this topic.
	Export Map to File	Enter a print service URL on the GIS Attribute Mapping page or on the map profile. Use the <b>Show Print</b> switch on the map profile to enable the print widget.	Click to open the <b>Export</b> dialog box to print the displayed map to a file. See "Printing Maps" in this topic.

## Drawing on Maps

Agency staff and registered public users can draw on maps using the sketch widget. You can save the sketch on permit and planning application property maps associated with a transaction, including the application intake map, and update the description after the system saves the sketch. Although you can draw on other map pages, you can't save them.

To configure the sketch widget, the agency turns on the **Show Sketch** switch on the map profile. On a map, click the **Show Sketch Tools** icon, then select a sketch tool in the toolbar to draw a point, polyline, polygon, rectangle, or circle. When you finish your drawing, the system automatically saves the sketch and lists it under the property information below the map. You can update the description after the sketch is saved. The sketch toolbar includes tools to select and delete sketches.

## Printing Maps

Oracle Permitting and Licensing provides an integration to print maps using Esri's print widget. Agency staff and registered public users can print the content displayed on different maps, including the permit and planning application property map and maps not associated with a submitted transaction, such as the application intake map or Explore Your City map. You have the option to save the generated file for submitted transactions as an attachment in the application details, but the file output for other maps isn't saved in the system.

To configure the print widget, the agency enters a print service URL on the GIS Attribute Mapping page or on the map profile and turns on the **Show Print** switch on the map profile.

Here's how to print a map:



1. Open a map and select the **Export Map to File** icon from the map tools toolbar.
2. On the Export dialog box, select the print output file format from the options provided by the print service and enter a file name.
3. Click **Export**.
4. If you're printing a transaction's property map, you can click **Yes** when prompted to save the file as an attachment in the application details.

## Selecting Parcels and Assets

You can select a parcel during application intake by using the type-ahead search box on the Property map in the intake form or using the selection tools. You can select enabled GIS assets using the selection tool widget.

By default, parcel properties are always selected when using the selection tools. But your agency can also configure the selection tools on the application intake map to select only GIS assets that overlap parcels or both reference parcel data and GIS assets. This configuration applies to the application intake map only.

If your agency has enabled GIS asset and parcel layers to be selectable, you can turn off the different layers like this:

1. In the main toolbar, click the **Show Selection Tools** icon:  .  
This opens the toolbar with the drawing tools.
2. Click the **Select Layers** icon:  .  
This opens the map layers dialog box.  
The map layers dialog box displays two columns: **Map layer** and **Selectable**. The eye icons for each layer indicate whether a layer is enabled or disabled.
3. Click the **Selectable** checkbox to make the map layer selectable using the selection tools.

When you select a GIS asset and the **Parcel** layer checkbox is marked, parcels that overlap the GIS asset are also selected on the map. Unmark the Parcel layer checkbox to turn off the parcel selection. Your agency must set up the Parcel layer to be selectable so that you can select parcels and GIS assets independently of each other.

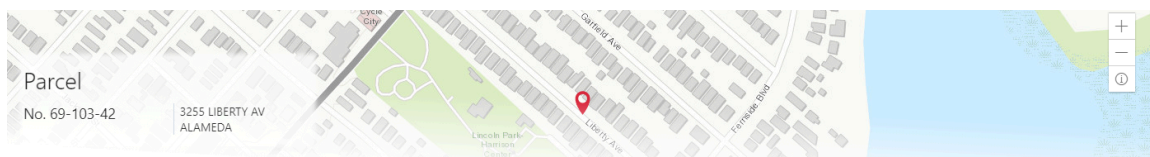
## Viewing Map Markers

Map markers identify the location of an object such as an application, project, incident, case, parcel, or address.

### Marker on the Transaction Header Map

The map in the header of a transaction page shows a single marker for the current object.

This example illustrates the Parcel page, where the map marker shows the parcel's location.

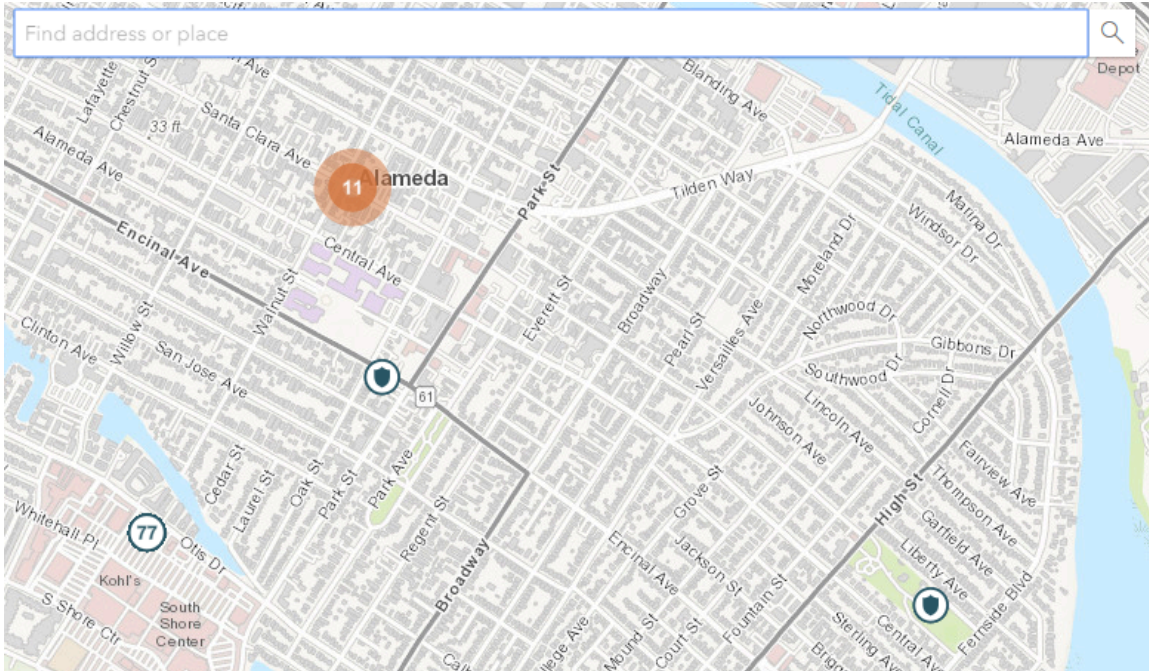


### Other Map Markers







Maps other than the ones in transaction headers have these markers:

- Transaction-specific icons to mark the locations of single transactions.
- Numbered circles to mark locations with multiple transactions.
- Orange-shaded double circles to represent multiple neighboring locations that are clustered together because of the map zoom level.

This example is from the View Recent Issues map, where map markers represent code enforcement issues.



The following table provides a key to the marker icons:

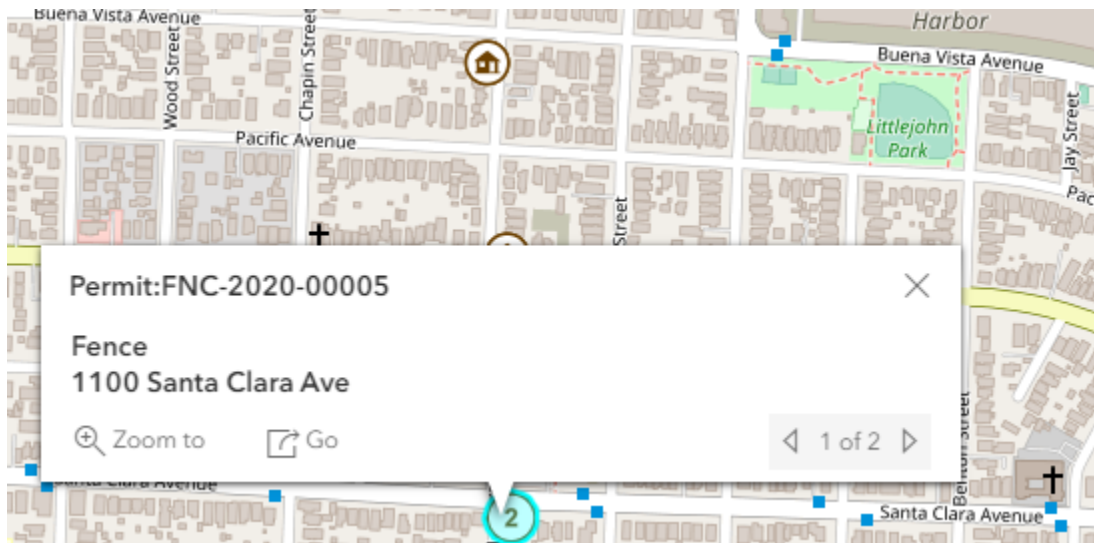
Map Marker	Description
	The location has a single code enforcement issue.
	The location has a single permit application.
	The location has a single planning application.
	The location has a single project.
	The location has a single business license.
	There are multiple transactions at the same location. The number represents the number of transactions.  The marker is the same color as it would be for a single transaction. For example, the marker is brown for multiple business licenses.

## Viewing Details for a Marker

Clicking a marker displays a pop-up window with additional details.

**Note:** If the selection toolbar is visible and a selection tool is active, clicking a marker selects the location rather than opening the details pop-up.

This example illustrates the detailed information for a map marker. The location of the pop-up window depends on the docking settings in the map profile



The detail window includes different information for different objects. Here is some of the information that can appear:

- The object ID  
On maps that show multiple types of objects, the object type (such as “Permit”) appears along with the object ID.
- The object status.  
Status information appears for incidents and cases, but not for other objects.
- Any applicable categorization, such as a permit type or an issue type and subtype.
- The address for the location.
- Controls for paging through multiple objects, if applicable.  
When there are multiple objects, the paging controls appear around the text *<sequence number> of <total number of objects>*.
- A **Zoom To** icon for zooming in on the map location.
- A **Go** icon for opening the corresponding detail page in a new window.

## Using the Main Map and Explore Your City Map

The agency-facing Main Map and the public-facing Explore Your City map provide options for viewing existing applications and projects on the map and for selecting properties so that you can start new applications.

With these maps, users can do the following:

- Select a property and view existing transactions for that property.
- Start an application for a selected property (public users and agency staff only).

Users who aren't sure what type of application is needed can launch the guide that provides recommendations based on questionnaire answers.

- Search for transactions and view transaction markers on the map.

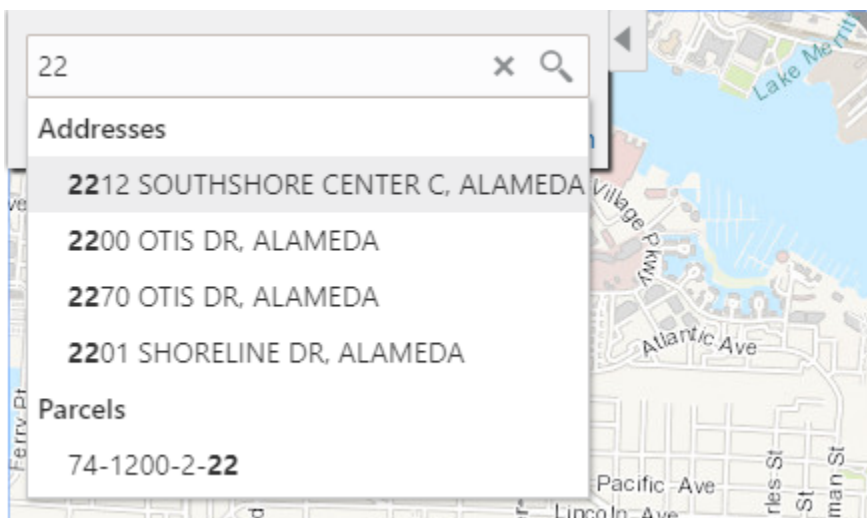
All users can search for transaction locations. Registered public users have the additional ability to filter search results so that only the user's own transactions appear.

**Note:** Transactions that are missing shape or geometry information can't be displayed on the map. Oracle recommends that your agency run the Update Shape on Transactions process after migrating transactions from the legacy system and after restarting the GIS servers due to maintenance. For more information, see [Using the Process Monitor](#).

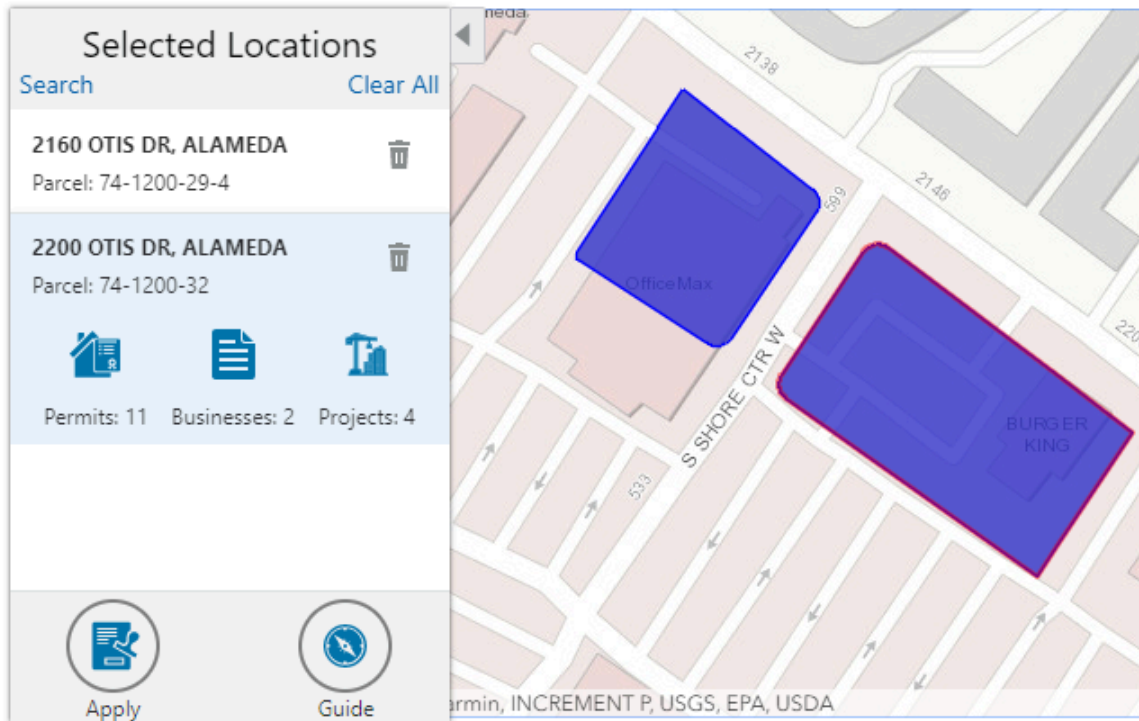
**Note:** To provide different types of users with the most appropriate interface, there are separate main maps for agency users, registered public users, and anonymous public users. These maps can have different map profiles, giving you control over whether various map options are available to each 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, a few 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 Enter or Return key or click the magnifying glass icon to perform a full search.

The Search window expands to show lists for Addresses and Parcels with a count for each type of result. Initially a maximum of five items appears in each list.

If more results exist, click **More** to show all results in a scrolling list. When the list is expanded, click **Less** to shrink the list back down to five locations.

3. To select a property, click a single address or parcel number from either the type-ahead list or the full results list.

The corresponding property is selected on the map, and the search field is replaced by the Selected Locations list.

4. To select additional properties without losing your selection, click the **Search** link to re-display the search field.

Each time you select a property, it is added to the Selected Locations list.

To return to the Selected Locations overlay from the Search overlay without performing a search, click the **Selected Locations** link. This link appears if at least one property is selected.

5. Use these options to deselect properties:

Page Element	Description
<b>Delete</b>	Click this icon to remove a single particular property from the list. The icon appears next to each selected property.
<b>Clear All</b>	Click this link to deselect all properties. The link appears at the top of the list.

## Selecting Properties Using the Selection Toolbar





To select properties directly from the map, without searching, use the drawing tools. You can use the search and the drawing tools together to add properties to (and remove properties from) your list.



To select and deselect properties using drawing tools:

1.  Click the **Show Selection Tools** button on the map's general toolbar.

The drawing toolbar appears.

2. Use these tools to make your property selection:

Selection Toolbar Button	Description
 Draw a Point	Click one or more points on the map to select the properties that contain the points.
 Draw a Polyline	Click two or more points on a map to draw a multi-segment line (a polyline) connecting the points that you click. Double-click on the final point to stop drawing. All properties that intersect the resulting polyline are selected.
 Draw a Polygon	Click three or more points on a map to draw a polygon. The system redraws the polygon after each click. Double-click on the final point to stop drawing. All properties that are at least partially within the resulting polygon are selected.
 Deselect One	Click a selected property to deselect it.  <b>Note:</b> Selecting a property does not deselect previously selected properties. You must use the Deselect One or the Deselect All tool to remove properties from your selection.

Selection Toolbar Button	Description
 Deselect All	Click this button to deselect all properties.
 Close	Click to close the toolbar.

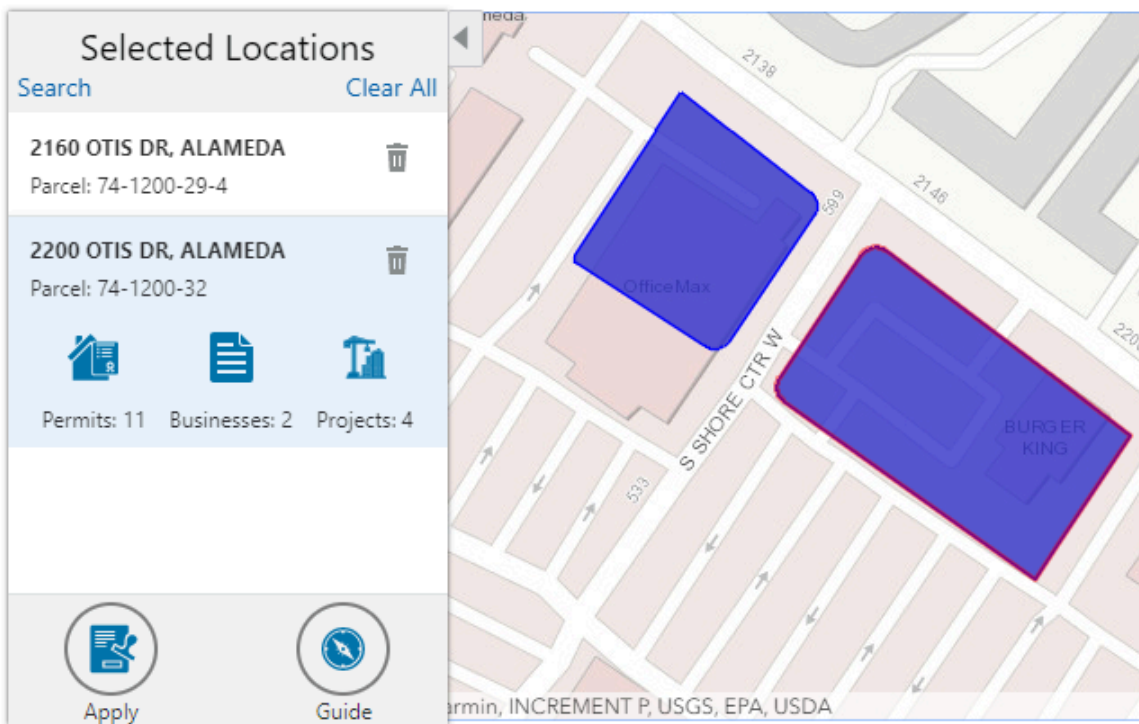
**3.** Review details of your selections on the Selected Locations list.

The Selected Locations list replaces the search window whenever properties are selected. This is a single list that also includes properties that you adding using the search.

## Using the Selected Locations List

The Selected Locations overlay enables you to review information about selected properties and the transactions that are associated with those properties.

In this example of the Selected Locations list, the addresses and parcel numbers of selected locations are links to the corresponding detail pages. These links are only present for agency staff. When public users see the Selected Locations overlay, the addresses and parcel numbers appear as plain text.



To use the Selected Locations overlay:

1. Review the information cards for the selected locations.

Each selected property appears on a card. The card title is the primary address for the location. The parcel number, if any, appears below this address. Agency staff can access the detail pages for selected addresses and parcels by clicking the address or the parcel number link on the card. Public users do not have access to detail information, so for public users, the addresses and parcel numbers are plain text instead of links.

**Note:** If an address has multiple parcels, each parcel appears on a separate card and all parcels are selected on the map. If a parcel has multiple addresses, a link below the parcel number indicates the number of addresses. Click the link to see a list of addresses.

2. Click a card to select it and learn more about the property.

If the selected property is associated with any applications or projects, the selected card expands and displays icons for any associated transactions. There are separate icons for **Permits, Planning Applications, Businesses** (business licenses), **Cases, Incidents** and **Projects**. The icon label includes a count of the related transactions.

**Note:** If the selected property has an associated business license that is marked to be hidden, then the icon label will not include it in its count.

If the property isn't 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).

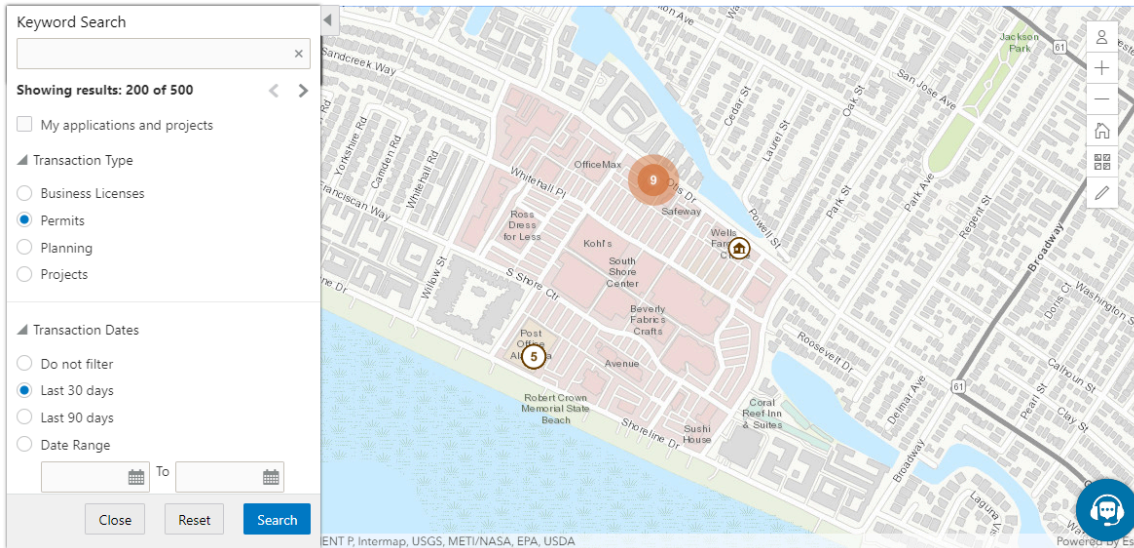
The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be prepopulated based on the selected properties.

Users who aren't sure what type of application is needed can click the **Guide** button instead. This launches the guide that provides application type recommendations based on questionnaire answers. The Guide button is available only if an Oracle Intelligent Advisor definition is associated with the agency record.

## Using Advanced Search to View Transactions

The advanced search is for searching transactions rather than properties. Use the advanced search to view map markers that indicate the locations of business licenses, permits, planning applications, cases, incidents and projects.

This example illustrates the advanced search.



**Note:** As agency staff, you will not see the check box used by registered public users to limit the search to their own transactions. If the registered public user is a primary contact for any projects, the check box label is **My Applications and Projects**. If the registered public user isn't a primary contact for any projects, the label is **My Applications**.

To show transactions on the map:

1. Click the **Advanced Search** link on the basic search overlay.

A new overlay appears.

2. Enter search keywords, if any, in the search field at the top of the overlay.

Search on data such as a business name or permit type. Don't use this field to search for addresses; use the basic search instead.

3. In the **Transaction Type** section, indicate which type of transaction to search.

Depending on which product offerings you enable, you can search for **Business Licenses**, **Permits**, **Planning** (planning applications), **Cases**, **Incidents** or **Projects**.

**Note:** Agencies can choose to hide their business license and other business information from appearing in the advanced search results and on the maps. For details on how to hide business information, see [Setting Up Agency-Level Options for Business Licenses](#) and [Managing Business Information](#).

4. In the **Transaction Dates** section, choose a date range to search.

Options include **Do not filter**, **Last 30 days**, **Last 90 days**, or a custom **Date Range**. If you use a custom date range, enter a start date, end date, or both to define the range.

For date-restricted searches:

- The application submission date must fall in the specified time period.
- A project start date must be after any start date you specify. If you use a custom date range with an end date, the project end date must be before any end date you specify.

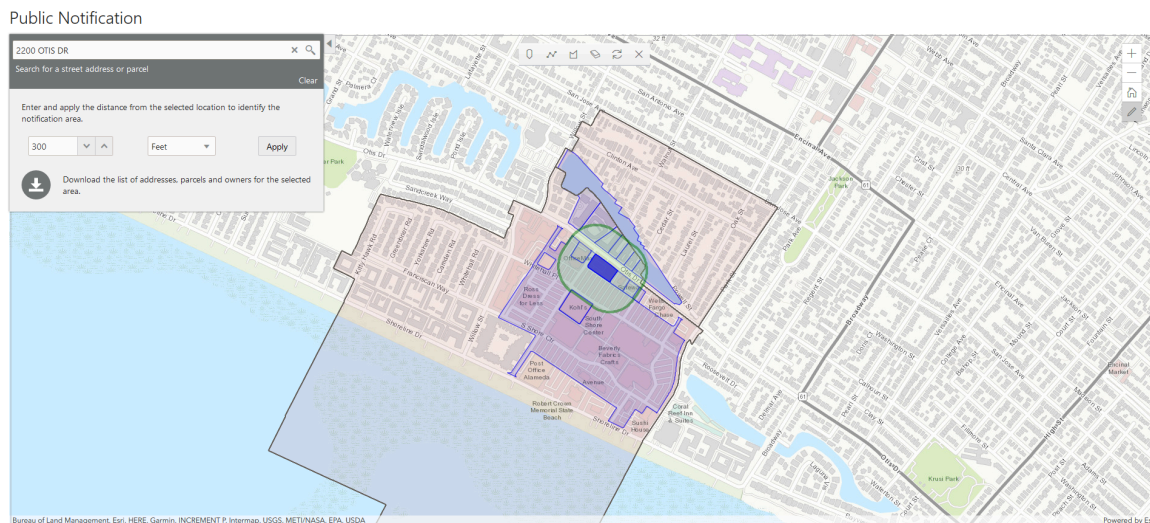
5. Click **Search** to perform the search.  
Map markers appear for the transactions that meet your search criteria. The overlay also displays text stating how many results were found.  
Users can see up to 200 results at a time. If more than 200 results exist, use the Previous (<) and Next (>) icons to scroll to a different block of results and update the map to show markers for the new block of results.
6. To clear search criteria, click **Reset**.
7. To close the advanced search and return to the simple location search, click **Close**.

## Creating Map-Based Public Notification Lists

The Public Notification map enables you to define an area on a map and generate .csv files for the parcels, owners, addresses, and neighborhood attributes that are included in that area. Use the .csv files to create your mailing list. The notification area consists of all properties that are at least partially within a specified distance of the selected property or properties.

A context-specific instance of this page is available for scheduling hearing notifications. See [Generating a Hearing Notifications List](#).

The following example illustrates the Public Notification page, where you can select properties, define a notification area around the selection, and download lists of addresses, parcels, owners, and neighborhood attributes in the notification area.




To define a notification area and generate notification lists:

1. Access the Public Notification page.  
To access the page from the global header, click the Maps icon, then click **Public Notification** in the drop-down menu.  
You can also access the page directly from the list of hearings for a planning application. If the hearing schedule is final, the action menu for the hearing includes the **Generate Notifications List** action. This action opens the Generate Notifications List window, which contains the Public Notification page. For more information, see [Generating a Hearing Notifications List](#).
2. Select a property, or confirm the default property selection.

If you access the Public Notification page from a hearing for a planning application, the property or properties from the planning application are selected by default.

The two methods for selecting properties are:

- Use the search field to search by street address or parcel number, then click the desired property in the type-ahead list or the search results.
- Click the Show Selection Tools icon on the main map toolbar: 

Use the selection tools such as **Draw Point**, **Draw Polyline**, or **Draw a Polygon** to select properties.

For detailed information on using the selection tools, see [Using the Main Map and Explore Your City Map](#).

3. Define the notification area by entering a buffer distance surrounding the selected properties.

The fields for defining the notification area appear below the search field when a property is selected.

Enter a number and select a unit of distance for the buffer area: *Feet, Miles, Meters, or Kilometers*.

The fields for entering the distance appear below the search field as long as at least one property is selected.

4. Click **Apply**.

The notification area appears on the map. Visually, it appears as a bold green outline that follows the contours of the selected property at the specified buffer distance. If you selected multiple properties, there can be multiple notification areas. Parcels that are fully or partially within the notification area appear with a blue outline so you can see which parcels are included in the notification list. If the map is enabled to show neighborhood groups that are fully or partially within the notification area, they appear as a pink layer with a black outline.

5. To change the notification area, modify the property selection, the buffer distance for the boundary, or both, and then click **Apply** again.
6. To clear the property selection and the notification area, click either the **Deselect All** tool or the **Clear** link on the Search overlay.
7. Turn on the **Modify Selection** switch to use the selection tools to manually add parcels outside of the notification area or remove parcels from the notification area.

The selection outline around the parcel appears when you add a parcel or is removed when you deselect a parcel.

8. When you are satisfied with the notification area, click the **Download** button that becomes visible after you apply a selection.

Three files are downloaded: *Address.csv*, *Owner.csv*, and *Parcel.csv*. If the map is enabled to show neighborhood groups that are fully or partially within the notification area, a fourth file is downloaded: *Neighborhood Group Mapping.csv*.

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

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

The notification process is not part of the Oracle system.



# 18 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 total or partial payments.

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 total or partial 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 total or partial 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 Payments page.

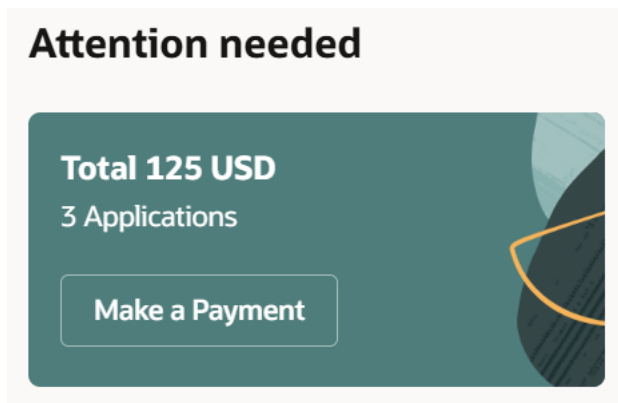
For information about fees payment from the registered public user's Applications page or from the agency staff's Transactions page, see *Managing Applications* and *Managing License Applications*.

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 button appears in the **Attention needed** card when a registered user logs in. The number of applications with fees for payment, if any, appears on the card.

This example illustrates the Attention needed card showing 3 applications with fees for payment:



Clicking 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 total or partial 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 which is described in the surrounding text:

Cancel   Proceed to Pay

## Make Payments

**Select a customer**

Name  
Abby Scott

Total Amount **1,926.42**   Paying For **3 items**   Total Amount to Pay **700**   Apply

**Want to pay by deposit account?**

**Select applications**

3 of 8 selected Download   Print

	Application ID	Application Type	Amount	Amount to Pay	Status	Condition	Submitted Date	Pro
<input checked="" type="checkbox"/>	RESNEW-2025-0011	Vacation Rental Renewable	105.00	105.00			10/29/25	
<input checked="" type="checkbox"/>	RESADD-2025-00021	Residential Addition Construction	550.00	550.00			10/21/25	137
<input checked="" type="checkbox"/>	BusLicRetail-OCT2025-0060	Credential	140.00	140.00			10/19/25	170
<input type="checkbox"/>	AUTO-JUL2025-0000013481	Hotel-Motel Monthly Reporting	581.42	581.42			7/30/25	181
<input type="checkbox"/>	BusLicRetail-JUL2025-0051	Credential	140.00	140.00			7/30/25	170
<input type="checkbox"/>	BusLicRetail-JUL2025-0048	Credential	280.00	280.00	Processing payment		7/30/25	170
<input type="checkbox"/>	AUTO-JUL2025-0000013473	Hotel-Motel Business License	100.00	100.00			7/29/25	170

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.

**Note:** When the integration with Oracle Receivables is enabled, both invoiceable and non-invoiceable applications are displayed in the list. You can't select invoiceable and non-invoiceable applications to be paid together in a single payment. Payments for each group must be selected and processed separately. For more information, see 'Integrating with Oracle Receivables' in *Implementing Your Financials Framework*.

Page Element	Description
<b>Total Amount, Paying For</b>	These fields display the number of applications and their total amount.
<b>Total Amount to Pay</b>	Enter the amount you wish to pay. It can be for single or multiple applications, and for total or partial payment of the selected applications.
<b>Apply</b>	After entering the total amount to pay, click the <b>Apply</b> button. This refreshes the <b>Amount to Pay</b> column in the <b>Selected applications</b> section to show the amounts which will be allocated for payment, especially during partial payments. This depends on the agency's payment configuration. For details, see <i>Setting Up Agencies</i> .
<b>Deposit Accounts</b>	Turn on this switch to select a deposit account from the drop-down list to make the payment.  <b>Note:</b> When a deposit account is selected, only those applications are displayed for which payment can be made using the selected deposit account.
<b>Select All/Deselect All</b>	Select the check box to select or deselect all applications. The check box can't be selected when the system is processing payment for an application or a condition preventing payment is applied.  The Amount Selected field above the grid shows the number of applications selected and the total amount due for the selected applications.
<b>Application ID</b>	Each item on the page is identified by the application ID. Click the Application ID link to open the overview page with the application summary and access to details.
<b>Application Type</b>	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 next to the application ID.
<b>Amount</b>	View the total fees for the application.  Click the fee amount link to open the <b>Amount details</b> drawer, which shows all due fees and any payment under processing, along with their amounts.
<b>Amount to Pay</b>	View the amount due for payment.  When an application is selected, the amount to pay appears as a link. Click the link to open the <b>Amount to pay</b> drawer to view the amount to be paid for the application (either in full or partial amounts as allocated by the user).

Page Element	Description
<b>Currency</b>	View the currency of total fees for the application.
<b>Status</b>	View the status of fees for the application.
<b>Condition</b>	View if a condition to prevent payment has been applied to the application. For more information about conditions, see <a href="#">Working with Application Conditions</a> .
<b>Submitted Date</b>	View the date on which the application was submitted.
<b>Property</b>	View the location of the property for the application.
<b>Description</b>	View a description of the application.
<b>Primary Contact</b>	View the primary contact for the application.  For information on how to add contacts and change the primary contact, see <a href="#">Working with Application Contacts</a> (for Permits and Planning Applications).
<b>Invoice</b>	When the integration with Oracle Receivables is enabled, the system creates invoices for supported applications. When applicable, view these invoice IDs in this column. When there are two or more invoices available for the selected application, a <b>Multiple</b> link is displayed. Click the link to open a drawer to view the details of the invoices. The column displays <i>Not created yet</i> , when there are invoiceable applications which are not yet invoiced.
<b>Cancel button</b>	Click to cancel and go back to the home page.
<b>Proceed to Pay button</b>	Click to access the Checkout page or the Deposit Account Payment page to continue with the payment.  <b>Note:</b> If the agency has enabled the use of third-party payment options, then a <b>Payment Choice</b> modal is displayed, on clicking the <b>Continue</b> button. The available options include <i>Cash, Credit card, Debit card, Offline, and Pay with other payment methods</i> . Select to pay with either of the available payment options.  For more information, see <a href="#">Setting Up Agency Payment Options</a> and <a href="#">Setting Up Third-Party Payments</a> .

Registered users can't make any changes to the application and associated fees submitted for payment during processing. After the payment processing is complete, the applications are removed from the list, and the system directs the user back to the page where the payment was initiated. If there are no more fees left after a successful payment, the user is directed to their Applications page. If the payment fails, the applications remain on the Make a Payment page and can be updated or resubmitted for payment.

For information about incomplete payments, see [Working with Fees and Payments](#) (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 check boxes to choose the applications to make payments.

**Note:** When the integration with Oracle Receivables is enabled, both invoiceable and non-invoiceable applications are displayed in the list. You can't select invoiceable and non-invoiceable applications to be paid together in a single payment. Payments for each group must be selected and processed separately. For more information, see 'Integrating with Oracle Receivables' in *Implementing Your Financials Framework*.

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*.

5. Review the **Checkout** page, which lists the different payment methods available, such as cash or credit card.

**Note:** If there is a credit balance available, agency staff has the option to use the **Apply Credit** switch to apply a credit for a payment on-account towards a payment of a fee amount. Before applying the credit, agency staff can click



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.

6. Select one of the payment methods for payment processing.

Depending on the payment service being used, the payment steps differ.

After successful payment, the agency user is returned to the page where the payment was initiated. The fee item records are now updated.

Page Element	Description
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.

Page Element	Description
	<p><b>Note:</b> When a customer's deposit account is selected, only those applications are displayed for which payment can be made using the selected deposit account.</p>
<b>Account</b>	Click the drop-down button to display a list of the customer's deposit accounts.
<b>Select All/Deselect All</b>	<p>Select the check box to select or deselect all applications. The check box can't be selected when the system is processing payment for an application or a condition preventing payment is applied.</p> <p>The <b>Total Selected</b> field above the grid shows the number of applications selected and the total amount due for the selected applications.</p>
<b>Application ID</b>	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.
<b>Application Type</b>	Displays the type of application, such as <i>Residential Addition</i> .
<b>Amount</b>	<p>View the total fees for the application.</p> <p>Click the fee amount link to open the <b>Amount details</b> drawer, which shows all due fees and any payment under processing, along with their amounts.</p>
<b>Amount to Pay</b>	<p>View the amount due for payment.</p> <p>When an application is selected, the amount to pay appears as a link. Click the link to open the <b>Amount to pay</b> drawer to view the amount to be paid for the application (either in full or partial amounts as allocated by the user).</p>
<b>Currency</b>	View the currency in which the payment is made.
<b>Status</b>	View the status of the payment.
<b>Condition</b>	View if a condition to prevent payment has been applied to the application. For more information about conditions, see <a href="#">Working with Application Conditions</a> .
<b>Submitted Date</b>	View the date on which the application was submitted.
<b>Property</b>	View the location of the property for the application.
<b>Description</b>	View a description of the application.
<b>Primary Contact</b>	<p>View the primary contact for the application.</p> <p>For information on how to add contacts and change the primary contact, see <a href="#">Working with Application Contacts</a> (Permits and Planning Applications).</p>
<b>Invoice</b>	When the integration with Oracle Receivables is enabled, the system creates invoices for supported applications. When applicable, view these invoice IDs in this column. When there are two or more invoices available for the selected application, a <b>Multiple</b> link is displayed. Click the link to open

Page Element	Description
	a drawer to view the details of the invoices. The column displays <i>Not created yet</i> , when there are invoiceable applications which are not yet invoiced.
<b>Cancel</b> button	Click to cancel and go back to the home page.
<b>Proceed To Pay</b> button	Click to access the Checkout page or the Deposit Account Payment page to continue with the payment.

## Making Payments for Multiple Business License Applications

Agency users and registered users can make payments for multiple business license applications, depending on the agency settings, 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. You can process payments for multiple applications also from the Make Payments page. For details, see [Setting Up Agencies](#).

Agency users and registered users can also make partial payments for selected license applications depending on the agency's payment configurations. For details on partial payments and payment allocation order, see [Setting Up Agencies](#).

## 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.

The Cashier Session page displays all open sessions. Click the Status to see open, closed, or suspended sessions. Use any of the other filters to search for and find the data you want. Click a row to see cashier session details.

This example shows the Cashier Session page

**Cashier Session**

Status: Closed | Search | Opening Balance | Closing Balance | Start Time: 2/2/26 - 3/4/26 | End Time: 2/2/26 - 3/4/26

Cash Drawer ID	Session ID	Start Time	End Time	Cashier ID	Status	Opening Balance	Closing Balance	Currency
MAIN001	Session-00238	2/20/26 7:34 AM	2/20/26 7:36 AM	168659	Closed	111.00	11.00	USD
Daily_Cash_Drawer	Session-00237	2/20/26 7:32 AM	2/20/26 7:47 AM	168659	Closed	100.00	10.00	USD
MAIN001	Session-00234	2/9/26 8:35 PM	2/20/26 7:33 AM	168659	Closed	100.00	10.00	USD
Daily_Cash_Drawer	Session-00231	2/2/26 11:08 PM	2/2/26 11:22 PM	168659	Closed	200.00	10.00	USD
MAIN001	Session-00230	2/2/26 10:10 AM	2/2/26 10:27 PM	168659	Closed	100.00	20.00	USD
Daily_Cash_Drawer	Session-00229	2/2/26 10:07 AM	2/2/26 9:18 PM	168659	Closed	99.00	0.00	USD

## Opening a Cashier Session

1. Select **Billing and Payment > Cashier Sessions**.
2. On the Cashier Session page, click **Add**.
3. On the New cashier session drawer, enter values for the following fields:

Page Element	Description
<b>Cashier Drawer ID</b>	Select the cash drawer that you want to use for this session.
<b>Session ID</b>	Displays the unique, system-generated ID for the cashier session.
<b>Start Time</b>	Displays the date and time the session was created.
<b>Status</b>	All new cashier sessions have a status of <i>Open</i> .
<b>Cashier ID</b>	Displays the unique ID of the cashier who is opening the cashier session.

Page Element	Description
	Administrators assign cashier IDs to agency staff on the Agency Staff page. You cannot open a cashier session if you do not have a cashier ID assigned to you.
<b>Opening Balance</b>	Enter the amount in the cash drawer at the beginning of the cashier session.

4. Click **Save**.

## Modifying a Cashier Session

1. Select **Billing and Payment > Cashier Sessions**.
2. Click a row on the Cashier Session page.
3. On the Cashier Session Details drawer you can:
  - o Suspend an open cashier session by setting the **Status** to *Suspended*.
  - o Reopen a suspended or closed cashier session by setting the **Status** back to *Open*.

This option is available only if the Reopen Cashier Session switch is turned on for the *CASH* payment method on the Agency Payment Options page. See [Setting Up Agency Payment Options](#).

- o Close a cashier session by setting the **Status** to *Closed*. When you close a cashier session enter an amount for the **Closing Balance**.

You can 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 page, agency staff can:

- Reconcile recorded and actual payment amounts.
- Print a cashier session reconciliation report.

This example shows the Reconcile Cashier Session page. The Reconcile Cashier Session page displays all Unreconciled sessions. Click Reconciliation Status to see Reconciled sessions or use any of the other filters to search for and find the data you want.

## Reconcile Cashier Session

Reconciliati... **Unreconciled** X Search
Closing Balance Discrepancy Amount

Reconciliation Status  
 Unreconciled

Session	Cashier ID	Status	Reconciliation Status
Session-00238	MAIN001	Closed	Unreconciled
Session-00237	Daily_Cash_Drawer	Closed	Unreconciled
Session-00236	MAIN002	Open	Unreconciled
Session-00235	Daily_Cash_Drawer	Closed	Unreconciled
Session-00234	MAIN001	Closed	Unreconciled
Session-00231	Daily_Cash_Drawer	Closed	Unreconciled
Session-00229	Daily_Cash_Drawer	Closed	Unreconciled

## 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 Cashier Session Summary page with the details and Payment summary section.

This example shows the Payment Details page.

The screenshot displays the 'Cashier Session Summary' page. At the top right, there is a 'Complete Reconciliation' button. The page is divided into two main sections: 'Cashier session details' and 'Payment summary'.

**Cashier session details**

Start Time 2/17/26 11:29 PM	End Time 2/24/26 10:24 PM
Opening Balance 999.00	Closing Balance 12.00
Cashier ID 02052026	Reconciliation Status Unreconciled
Status Open	Comments

Below the details is a 'Change Status' button.

**Payment summary**

Payment Method	Currency	Opening Balance	Recorded Amount
CASH	USD	999.00	50.00
CCK	USD	0.00	211.00
PRCK	USD	0.00	250.00

- Click a row for a receipt to make changes to the payment information. For cash payments, you can enter comments, but you can't edit any other payment information. For checks, you can edit the following payment information fields:

Page Element	Description
<b>Payment Method</b>	Select between <i>Personal check</i> and <i>Cashier check</i> .
<b>Actual Amount</b>	Typically this is the same as the recorded amount, but in the event that the check was written for a different amount, enter that actual amount here.
<b>Check Number, Check Date, Payer Name, and Address</b>	Update the check and payer information.
<b>Comments</b>	Enter any comments you want to add about the check payment.

- 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
<b>Parameter ID</b>	1

Page Element	Value
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

1. Select **Billing and Payment > Reconcile Cashier Session** in the Navigator.
2. Click the cashier session row for which you want to generate an accounting entry.
3. Complete the reconciliation for the cashier session if you haven't already. You can generate accounting entries only for completed reconciliations that result in an overage or a shortage.
4. Click **Generate Event** to generate an accounting entry for the overage or shortage.

**Note:** To successfully create accounting entries for cashier reconciliation overages and shortages, you must first create accounting rules for them. For more information on setting up accounting rules, see [Setting Up Accounting Rules](#).

## Printing Deposit Slips

Agencies that collect payments use deposit slips to deposit the money collected in the form of cash and checks into the agency's bank account.

You print deposit slips using the Print Deposit Slip page.

### Prerequisites

Before you generate deposit slips for your agency, you must define the P\_DEPOSIT\_SLIP\_NUMBER parameter for the Deposit Slip (DepositSlip001) report. For more information on defining report parameters, see [Setting Up Reports](#).

### Generating Deposit Slips

1. Select **Billing and Payment > Deposit Slip**.
2. On the Print Deposit Slip page, enter values for the following fields:

Page Element	Description
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.

Page Element	Description
<b>Payment Method</b>	Select the payment methods that you wanted to include in the deposit slip. Options are <b>Cash</b> , <b>Cashier Check</b> , and <b>Personal Check</b> .
<b>Cash Drawer ID</b>	Select a value to print a deposit slip for the receipts of a specific cash drawer. If you leave this field blank, the deposit slip will include all cash drawers for the specified date range.
<b>Cashier Session ID</b>	Select a value to print a deposit slip for the receipts of a cashier session. If you leave this field blank, the deposit slip will include all cashier sessions for the specified date range.
<b>Cashier ID</b>	Select a value to print a deposit slip for the receipts of a specific cashier. If you leave this field blank, the deposit slip will include all cashiers for the specified date range.
<b>Payment Method and Receipts</b>	Select the payment method and type of receipts that you want to include in the deposit slip.

**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 Payment History page. The enhanced user experience streamlines the look and feel of this page.

This example shows the Payment History page.

# Payment History

Payment St... Paid Search

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 only view 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
PS

Payment History Details
Cancel

### Overview

Payment Method <b>Credit card</b>	Payment Status <b>Paid</b>	Payment Reference ID <b>CRCD_20250205T154349781Z701953</b>
Receivables Receipt Status <b>None</b>	Payment Transaction ID <b>59520</b>	Receipt Date <b>2/5/25</b>
First Name <b>Peter</b>	Amount Due <b>655.60</b>	Last Name <b>Skate</b>
Credit Amount Applied <b>0.00</b>	Payer Name <b>df dsf</b>	Payment Amount <b>655.60</b>
Currency <b>USD</b>	Service Charge Amount	Reversal Flag <b>No</b>
Reversal Reason		

### 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](#).

You can reverse payments associated with a returned check. For more information, see [Processing Returned Checks](#).

## 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
EZE-190830-00001	8/30/19	Alden Richards	148.80	USD
EZE-190830-00002	8/30/19	Carl Jones	148.80	USD
EZE-190830-00003	8/30/19	Alden Richards	148.80	USD
EZE-190830-00004	8/30/19	Alden Richards	148.80	USD
EZE-190830-00005	8/30/19	Alden Richards	148.80	USD
EZE-190830-00006	8/30/19	Carl Jones	148.80	USD
EZE-190830-00007	8/30/19	Alden Richards	148.80	USD
EZE-190830-00008	8/30/19	Alden Richards	148.80	USD

Page 1 of 12 (1-8 of 91 items) | Search | Show Default

## Reviewing Invoice History

1. Select **Billing and Payment > Invoice History** in the navigator.

**Note:** Registered public users can also access this page from the Registered Public Landing Page by selecting [View Invoice History](#) from the **I Want To** field. Public users can view only their own invoices.

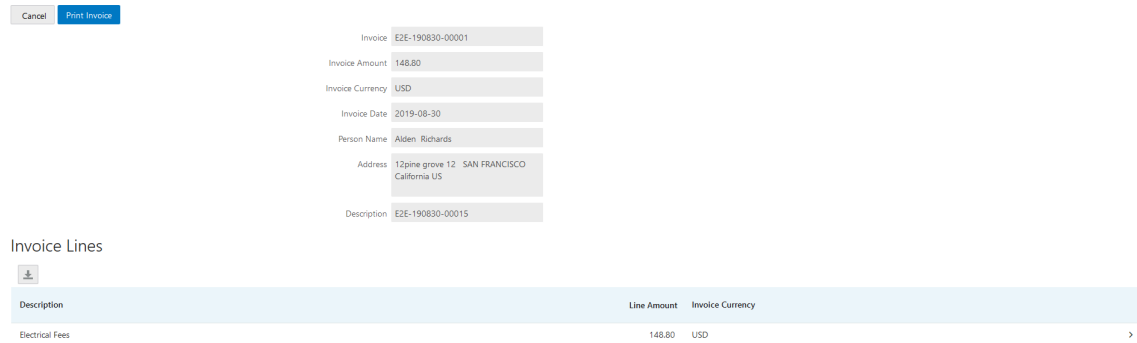
The Invoices History page displays all of the invoices issued by the agency. You can search for and sort invoices by:

- Invoice ID
- Invoice date
- Person name
- Invoice amount

- 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.



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 Pending** ▾

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Refund Reques...	Refund Type	Refund Method	Refund Amount	Refund Currency	Refund Status	Refund Reason	Refund Processe...	Refund ID
2025-10-31	Refund	Offline	100	USD	Pending	Excess paid		RFND_20251031T1222180000Z6524E
2026-01-20	Refund	Offline	75	USD	Pending	Cancel		RFND_20260120T0901180000Z4213E
2026-01-20	Refund	Offline	50	USD	Pending	Cancel		RFND_20260120T0901180000Z0726E
2026-01-20	Refund	Offline	75	USD	Pending	Cancel		RFND_20260120T0901180000Z3254E
2026-01-20	Refund	Offline	75	USD	Pending	Cancel		RFND_20260120T0901180000Z5209E
2026-01-20	Refund	Offline	50	USD	Pending	Cancel		RFND_20260120T0901180000Z9595E
2025-10-27	Refund	Offline	100	USD	Pending	Excess paid		RFND_20251027T0618270000Z0676E
2025-10-28	Refund	Offline	100	USD	Pending	Excess paid		RFND_20251028T0541480000Z9013E
2025-10-28	Refund	Offline	100	USD	Pending	Excess paid		RFND_20251028T0646350000Z5071E

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## Reviewing Refund History

1. In the search bar, enter Refund History.

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.

The screenshot displays the 'Refund History Pending' section with a search bar and a table of refund requests. The 'Refund Detail' panel on the right provides specific information for a selected refund.

Refund Request Date	Refund Type	Refund Method	Refund Amount
2025-10-31	Refund	Offline	100
2026-01-20	Refund	Offline	75
2026-01-20	Refund	Offline	50
2026-01-20	Refund	Offline	75
2026-01-20	Refund	Offline	75
2026-01-20	Refund	Offline	50
2025-10-27	Refund	Offline	100
2025-10-28	Refund	Offline	100
2025-10-28	Refund	Offline	100

Refund Detail	
Refund ID	RFND_20260120T0901180000Z4213E
Payment Reference ID	OFLN_20260120T061301853Z226089
Refund Type	ORA_RFND
Payment Method	ORA_OFLN
Receipt Date	2026-01-20
Refund Request Date	2026-01-20
Refund Processed Date	--
Refund Amount	75
Payment Amount	75
Refund Currency	USD
Credit Applied	--
Receivables Receipt Status	ORA_NONE
Refund Transaction ID	--
Trust Account Number	0
Refund Method	Offline
Refund Status	ORA PEND

Buttons: Cancel, Void Refund, Process Refund

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 drawer.

## Processing Refunds

1. In the search bar, enter Refund History.
2. Use the drop-down to select a refund with a **Refund Status** of *Pending*.
3. 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. In the search bar, enter Refund History.
2. Use the drop-down to select a refund with a **Refund Status** of *Pending*.
3. On the Refund detail drawer, click **Void Refund**.

You are returned to the Refund History page. The process changes the **Refund Status** of the refund to *Void* and enters the date and time that the refund was processed in the **Refund Processed Date** column.

## Printing Refunds

1. In the search bar, enter Refund History.

2. Use the drop-down to select a refund with a **Refund Status** of *Refunded*.
3. On the Refund Detail drawer, click **Print Refund** to 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.

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.

Field	Value	Field	Value	Field	Value
On Account Reference ID	OVPPY_20250125T21106000022709E	On Account Status	Unapplied	Payment Reference ID	CASH_1737839402332
On Account Date	1/25/25	Payment Transaction ID	CASH_1737839402332	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 Business Licenses, 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](#).

For more information, see [Oracle Receivables Integration Overview](#).

## Syncing Invoice Statuses

Run the Sync Invoice Status process to sync payments received in Oracle Fusion Receivables with Business Licenses, Permits, and Planning and Zoning.

Integration with Oracle Receivables enables agencies to process invoices when payments are made for fees in Business Licenses, 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.

For more information, see [Oracle Receivables Integration Overview](#).

## Creating Oracle Receivable Receipts

Run the Create Oracle Receivables Receipts process to generate standard receipts in Oracle Receivables for invoice payments received in Oracle Business Licenses, 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*.

For more information, see [Oracle Receivables Integration Overview](#).

## Scheduling the Process

1. Access the Schedule tab.
2. To immediately add the process to the queue, select the **As soon as possible** option.
3. To create a schedule for the process, select the **Using a schedule** option, and enter values using the following fields:

Page Element	Description
<b>Frequency</b>	Select how frequently you want to run the process. Values are: <ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.

Page Element	Description
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>
<b>By day</b>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly or Yearly</i>.</p>
<b>By date</b>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly or Yearly</i>.</p>

Page Element	Description
<p><b>Month</b></p>	<p>Select the months in which you want your process to run.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

## Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- o On success
- o On error
- o On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

## Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

## Reconciling Orphaned Card 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
<b>Frequency</b>	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.

Page Element	Description
	<p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>
<p><b>By day</b></p>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p><b>By date</b></p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p><b>Month</b></p>	<p>Select the months in which you want your process to run.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

## Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- 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.

The enhanced user experience is now available for the Cash Drawer Payment History page. The enhanced user experience streamlines the look and feel of this page.

This example shows the Cash Drawer Payment History page.

## Cash Drawer Payment History

Search

Payment Status Paid

Payment Reference ID	Line Number	Receipt Date	Payment Method	Amount
RVSL_20250729T0705400000Z428E	1	7/29/25	Check	-10
RVSL_20250729T0552400000Z3578E	1	7/29/25	Check	-10
RVSL_20250729T0650570000Z5759E	1	7/29/25	Check	-10
CASH_20250729T091348581Z975417	1	7/29/25	Check	10
CASH_20250729T065746805Z928666	1	7/29/25	Check	10
UNAP_20250729T0705400000Z428E	101	7/29/25	Check	10
CASH_20250729T043546366Z099180	1	7/29/25	Check	10
UNAP_20250729T0552400000Z3578E	101	7/29/25	Check	10

### Reversing or Voiding Payments

1. Select **Billing and Payment** > **Cash Drawer Payment History** page in the navigator.
2. Search for the check and select it to view the **Cash drawer payment detail** drawer.
3. Turn on the **Want to Reverse the Payment?** switch and click the **Reverse Payment** button.
4. In the **Cash drawer line details** section, 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 reinstate fees, then agency staff will see the Reverse Payment button on the Cash drawer payment detail drawer. If agency payment options are configured to not reinstate fees, then agency staff will see a Void Payment button on the Cash drawer payment detail drawer.

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.

# 19 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
<b>Frequency</b>	<p>Select how frequently you want to run the process. Values are:</p> <ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>

Page Element	Description
<p><b>By day</b></p>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p><b>By date</b></p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p><b>Month</b></p>	<p>Select the months in which you want your process to run.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

## Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.

4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- o On success
- o On error
- o On warning

You can remove any of these process notification conditions.

5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

## Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

## Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

This page displays the fee items for agency transactions that require accounting journals. Each fee item row displays the transaction ID of the transaction from which it originated and the name of the source table that contains the detail for that transaction. These accounting transactions are processed by the Generate Accounting process.

## Viewing Accounting Transactions

1. Select **Accounting > Accounting Transactions**, or click **Accounting Transactions** on the Agency Springboard.
2. Select an accounting transaction on the Accounting Transactions page to view additional information about the transaction.

Each accounting transaction has one of the following statuses:

- o *Created*: The Generate Accounting process couldn't create a journal for the accounting transaction because there is no applicable accounting rule.
- o *Generated*: The Generate Accounting process created a journal for the accounting transaction.

For accounting transactions with a status of *Generated*, the **Journal** grid displays information about the journal entry associated with it including the Journal ID, Accounting Event, and Journal Status. For more information on journal entries, see [Reviewing Journal Entries](#).

The **Accounting Transaction Errors** grid displays any error messages associated with the accounting transaction. These errors must be corrected before a journal can be created for the transaction.

## Reviewing Journal Entries

You view and edit journal entries on the Journal page.

Journals contain debit and credit accounting entries created by the Generate Accounting process for the accounting transactions that it processes. You can export journals that do not contain errors to an Enterprise Resource Planning (ERP) system.

### Viewing Journal Entries

Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.

The grid on the Journal page displays all of your journal entries and their current status by the accounting date. Valid journal entry statuses are:

- *Created*: Indicates that the journal has been created but not validated.
- *Error*: Indicates that the journal has one or more validation errors.
- *Valid*: Indicates that the journal has been validated and is ready to be exported.
- *Sent*: Indicates that the journal has been exported to a file that can be used to update an ERP system.

### Reviewing Accounting Lines

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. In the Lines tab of the Journal Details page, select an accounting line.
4. On the details page, you can update the following accounting fields:
  - **Account**
  - **Division**
  - **Department**
  - **Fund**
  - **Function**
  - **Program**
5. Click **Save**.
6. On the Journal Details page, click **Validate** to ensure that the accounting lines are still valid after the changes you made.

### Viewing Journal Entry Errors

1. Select **Accounting > Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. Access the Header Errors tab to view any header errors for the accounting line.
4. Access the Line Errors tab to view any line errors for the accounting line.  
You can correct these errors on the Lines tab. Once you correct and validate a line error, it no longer appears on the Line Errors tab.

## Exporting Journal Entries

You create a file containing accounting transactions that can be imported into an Enterprise Resource Planning (ERP) system.

When a *Publish Accounting* integration is enabled for your agency, the Export Journals to ERP process publishes accounting information to OIC where it can be transformed and imported by third-party applications. For more information, see *Setting Up Agency Integrations*.

**Note:** If you use Oracle Financials Cloud as your ERP system, we recommend using the Financials Cloud Subledger Accounting feature to enable ERP accounting integration instead of using the Export Journals to ERP process.

You run the process that exports journal entries on the Export Journals to ERP page, which you can access by selecting **Accounting > Export Journals**.

### Entering Export Journals to ERP Process Parameters

Access the Parameters tab on the Export Journals to ERP page and enter values using the following fields:

Page Element	Description
<b>Mapping Name</b>	Select the Data Format Exchange mapping that you want to use to generate the file. For more information on the Data Format Exchange utility, see <i>Setting Up Data Format Exchange Maps</i> .
<b>All Open Periods</b>	Select to include journals for all open accounting periods.
<b>Specify Dates</b>	Select to include journals for a specific accounting date range.
<b>Accounting Date From</b> and <b>Accounting Date To</b>	Specify the range of accounting dates for which you are exporting journal entries.
<b>Select Ledgers</b>	Select the ledgers for which you want to export journal entries.

### Scheduling the Process

1. Access the Schedule tab.
2. To immediately add the process to the queue, select the **As soon as possible** option.
3. To create a schedule for the process, select the **Using a schedule** option, and enter values using the following fields:

Page Element	Description
<b>Frequency</b>	Select how frequently you want to run the process. Values are:

Page Element	Description
	<ul style="list-style-type: none"> <li>○ <i>Once</i>: Select to run the process one time only.</li> <li>○ <i>Hourly or minute</i>: Select to run the process at regular time intervals.</li> <li>○ <i>Daily</i>: Select to run the process at regular intervals in days.</li> <li>○ <i>Weekly</i>: Select to run the process at regular intervals in weeks.</li> <li>○ <i>Monthly</i>: Select to run the process on specific days of the month.</li> <li>○ <i>Yearly</i>: Select to run the process during specific months.</li> </ul>
<b>Start Date</b>	Enter the date on which you want to begin your scheduled processing.
<b>End Date</b>	Enter the date on which you want to end your scheduling processing.
<b>Hours and Minutes</b>	<p>Enter the time interval between scheduled processes. For example, if you enter 2 in the <b>Hours</b> field and 30 in the <b>Minutes</b> field, the process will run every 2 hours and 30 minutes beginning on the specified start date.</p> <p><b>Note:</b> These fields are available only if you select a process frequency of <i>Hourly or minute</i>.</p>
<b>Days</b>	<p>Enter the number of days between scheduled processes. For example, if you enter 3, the process will run every 3 days beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Daily</i>.</p>
<b>Weeks</b>	<p>Enter the number of weeks between scheduled processes. For example, if you enter 6, the process will run every 6 weeks beginning on the specified start date.</p> <p><b>Note:</b> This field is available only if you select a process frequency of <i>Weekly</i>.</p>
<b>By day</b>	<p>Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the <b>Second</b> and <b>Wednesday</b> options, the process will run on the second Wednesday of every month.</p> <p>You can select more than one week of the month and day of the week option. For example, you could schedule the process to run on the first and third Monday of every month.</p>

Page Element	Description
	<p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p><b>By date</b></p>	<p>Select this option to run the process on specific dates of the month. You can select more than one date.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Monthly</i> or <i>Yearly</i>.</p>
<p><b>Month</b></p>	<p>Select the months in which you want your process to run.</p> <p><b>Note:</b> This option and its associated fields are available only if you select a process frequency of <i>Yearly</i>.</p>

## Setting Up Process Notifications

You can set up the process to send notifications to you and others when it runs.

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.
4. On the Create Notification page, enter the email address of the person you want to receive notifications.

By default, the recipient will receive a notification when the process ends with the following conditions:

- 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](#).



# 20 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.



# 21 Working with Processes

## Using the Process Monitor

The Process Monitor enables users to initiate and manage processes specific to Oracle Permitting and Licensing.

Select **Permitting and Licensing Process Monitor** on the Permitting and Licensing home page to open the Process Monitor page displayed using the Redwood Experience.

**Note:** The Process Monitor page in Permitting and Licensing is distinct from Scheduled Processes in the Oracle Cloud. For more information running ESS jobs in the Oracle Cloud, see *Best Practices for Scheduled Processes*.

## Scheduling a New Process

1. On the Process Monitor page, click the **Schedule New Process** button.
2. On the Schedule new process drawer, select the process you want to run. A description of the selected process appears in the **Description** field.
3. Click **Add** to access the page associated with the process you selected. For example, if you select the *Generate Accounting* process, clicking the **Add** button accesses the Generate Accounting page.
4. Enter parameters for the process.

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.

5. Click **Submit**.
6. Click **Refresh** to view the current status of the processes listed in the Process Monitor.

## Managing Processes

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 **Sort By** to filter the displayed process information by *Name*, *Process*, or *Submission Time* or *Scheduled Time*.

You can manage processes using the available actions:

Page Element	Description
<b>Actions</b>	Click the icon in this column to select one of the following actions: <ul style="list-style-type: none"><li>• <i>Put on Hold</i></li><li>• <i>Release Process</i></li><li>• <i>Cancel Process</i></li></ul> Click <b>View Details</b> to view additional information about the process on the Process Details page.

# 22 Working with Reports

## Generating Reports

Agency staff can now find reports and dashboards in the business intelligence catalog with the Reports and Analytics work area. Reports and Analytics includes all analyses, dashboards, and reports, such as permit activity, building permits, business license certificates, receipts, deposit slips, inspection summaries, code enforcement case history, and many more.

You can access the reports, analyses, and dashboards 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 *Creating Analyses and Dashboards in Oracle Transactional Business Intelligence, Manage Content, Assign Access Permissions*.

For a list of delivered reports, see *Permitting and Licensing Analytics*.

This example illustrates the generated report for a building permit.

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.

The screenshot displays a web interface for a building permit report. At the top, there is a search bar with 'Permit Number RESADD-2020-00068' and an 'Apply' button. The main header features the 'City of Innovation Building Department' logo and title. Below this is a large black banner with the text 'Building Permit' in white. The report content is organized into a table with two columns. The left column contains 'Permit Number', 'Parcel Number', 'Work Description', 'Owner', and 'Total Fees Paid'. The right column contains 'Issued On', 'Reissued On', 'Expires On', 'Address', and 'Contractor'. Below the table, there are sections for 'Expiration' and 'Extension' with their respective details. On the right side of the interface, there is a 'View Report' menu with options for HTML, PDF, RTF, Excel (\*.xlsx), PowerPoint (\*.pptx), and Data.

Permit Number	RESADD-2020-00068	Issued On	Nov 24, 2021
Parcel Number	71-237-5	Reissued On	Nov 24, 2022
Work Description	Add Portico	Expires On	May 19, 2024
Owner		Address	1217 N WALNUT ST W ALAMEDA California 94501
Total Fees Paid	320 USD	Contractor	Brandon Wood 1217 Walnut St Alameda California 94501

Here's how to generate a report from Reports and Analytics:

1. Click Reports and Analytics.
2. Expand the All Folders, Shared Folders, Public Sector links in the left panel of the Reports and Analytics 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.
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.

For more information about using the Reports and Analytics workarea, see *Creating Analyses and Dashboards in Oracle Transactional Business Intelligence, Get Started with Creating Analyses and Dashboards*.

# 23 Using Accessibility Features

## Overview of Accessibility

This topic provides an overview of the approach towards accessibility in the Oracle Permitting and Licensing offerings.

The Oracle Permitting and Licensing services are developed with the latest industry standards for accessibility in mind, which is in keeping with the overall development approach within Oracle.

Oracle recognizes the need for our applications, and our customers' and partners' products built with our tools, to be usable by the disabled community. The Oracle Accessibility Program Office, reporting to the office of the Chief Corporate Architect, is responsible for defining the corporate standards for accessibility, and developing materials to train all employees so that they can successfully create products that meet those standards.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/us/corporate/accessibility/index.html>.

Oracle uses the Voluntary Product Accessibility Template (VPAT) to represent the degree of conformance to various accessibility standards and guidelines, including Section 508 (as released in 2001), WCAG 1.0, and WCAG 2.0. Depending on when a product was developed and released, different standards may be listed. Oracle is an active member on the ITI group that is working to enhance the VPAT to address future standards.

For more information about Oracle's published VPAT documents, see the Product Status (VPATs) page at <http://www.oracle.com/us/corporate/accessibility/vpats/index.html>.

## Using General Keyboard Shortcuts

This topic lists and describes the supported general keyboard shortcuts.

Keyboard Shortcut	Description
Tab	<p>This is the primary key used by all keyboard users to move from each control that can accept focus.</p> <ul style="list-style-type: none"><li>• Use Tab to select any actionable or field just like you can use the mouse to select any field on the page.</li><li>• For folder tabs, the Tab key will take you to a tab, and then you have to use other keys to select and navigate within that tab.</li><li>• For radio buttons the Tab key will take you to the first radio button in a radio button set, and then you have to use other keys to select items within the radio button set.</li><li>• For drop-down lists, the Tab key will take you to the list field, and then you have to use other keys to move through values and select values.</li></ul>
Shift+Tab	<p>This keyboard combination works the same as Tab, except it works in the opposite direction. For example, it enables you to switch focus to the previous control or field, rather than the next control or field.</p>

Keyboard Shortcut	Description
Spacebar	Use for: <ul style="list-style-type: none"> <li>• Selecting a tab</li> <li>• Activating a button</li> <li>• Selecting a checkbox</li> <li>• Selecting a radio button that is not selected</li> </ul>
Enter	Use to: <ul style="list-style-type: none"> <li>• Press a button.</li> <li>• Click a link.</li> <li>• Select an item from a drop-down list.</li> </ul>
Down Arrow	Use for: <ul style="list-style-type: none"> <li>• Moving through values in a drop-down list</li> <li>• Selecting different values in a set of radio buttons</li> <li>• Moving between different folder tabs</li> </ul>
Up Arrow	Works the same as the Down Arrow, except it enables you to move in the opposite direction (previous instead of next).
Left Arrow	Works similar to the Up Arrow.
Right Arrow	Works similar to the Down Arrow.
Home	When in the context of tabs, sets focus to the first tab.
Ctrl+Home	Takes you to the very top of a page.

## Using the Keyboard with Data Collections

This topic describes examples of how to use keyboard shortcuts to navigate within the various collections, such as tables and lists, and select actionable items.

### Tables

This section describes how to navigate within tables appearing on a page. The example below uses the Country table for illustration.

## Country

Country Code	ISO Alpha 2 Code	ISO Numeric 3 Code	Country Name
COG	CG	178	Congo >
COK	CK	184	Cook Islands >
COL	CO	170	Colombia >
COM	KM	174	Comoros >
CRI	CR	188	Costa Rica >
CUB	CU	192	Cuba >
CUW	CW	531	Curacao >
CXR	CX	162	Christmas Island >
CYM	KY	136	Cayman Islands >
CYP	CY	196	Cyprus >
DEU	DE	276	Germany >

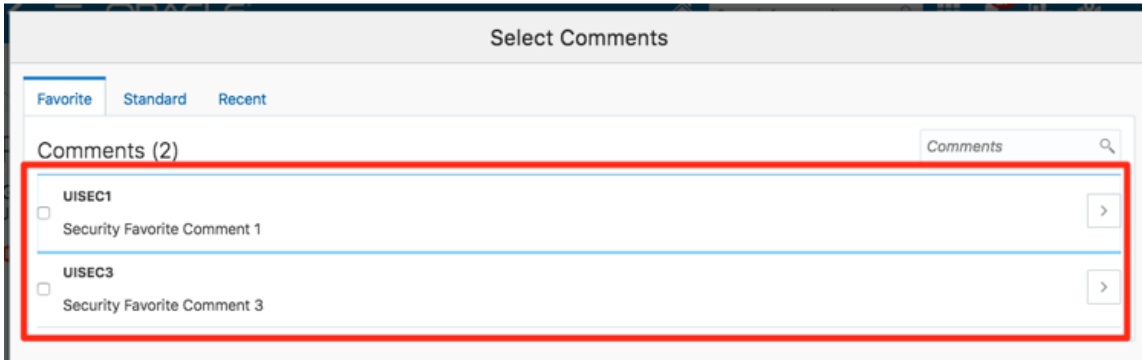
Page 1 of 22 (1-11 of 240 items) | 1 2 3 4 5 ... 22 >

Target	Key	Description
Cell	Tab	<p>The first Tab into the table moves focus to the first column header.</p> <p>The second Tab moves focus to the next focusable element outside of the table.</p> <p>If focus is on a row and the row has been placed in actionable mode using the F2 key, then Tab moves focus to the next focusable element within the row.</p> <p>If focus is already on the last focusable element, then focus will wrap to the first focusable element in the row.</p>
	Shift+Tab	<p>The first Shift+Tab into the table moves focus to the first column header.</p> <p>The second Shift+Tab moves focus to the previous focusable element outside of the table.</p> <p>If focus is on a row and the row is actionable, then Shift+Tab moves focus to the previous focusable element within the row.</p> <p>If focus is already on the first focusable element, then focus will wrap to the last focusable element in the row.</p>
	Down Arrow	Move focus to the next row.
	Shift+Down Arrow	Select and move focus to the next row.

Target	Key	Description
	Up Arrow	Move focus to the previous row. If at the first row, then move to the column header.
	Shift+Up Arrow	Select and move focus to the previous row.
	Home	Move focus to first row.
	End	Move focus to last row.
	Space	If chevron icon is used, drill down to the detail.
	Enter	Toggle the current row to actionable mode if there exists a tabbable element in the row.  Once toggled to actionable mode, focus will be moved to be first tabbable element in the row.
	F2	Toggle the current row to actionable mode if there exists a tabbable element in the row.
Column Header	Tab	Navigate to next focusable element on page (outside table).
	Shift+Tab	Navigate to previous focusable element on page (outside table).
	Down Arrow	Move focus to the first row.
	Left Arrow	Move focus to previous column header.
	Right Arrow	Move focus to next column header.
	Home	Move focus to first column header.
	End	Move focus to last column header.
	Space	Select column.

## List View

This section describes how to navigate within tables appearing on a page. The example below uses the Country table for illustration.



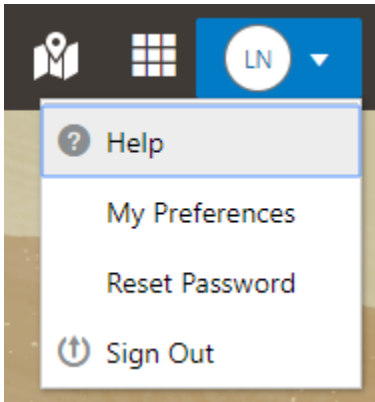
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the last focusable element is reached, shift focus back to the first focusable element. When not in Actionable Mode, navigates to next focusable element on page (outside ListView).
	Shift+Tab	When in Actionable Mode, navigates to previous focusable element within the item. If the first focusable element is reached, shift focus back to the last focusable element. When not in Actionable Mode, navigates to previous focusable element on page (outside ListView).
	Down Arrow	Move focus to the item below.
	Up Arrow	Move focus to the item above.
	Left Arrow	When display in card layout, move focus to the item on the left.
	Right Arrow	When display in card layout, move focus to the item on the right.
	Shift+F10	Launch the context menu if there is one associated with the current item.
	Enter	Selects the current item, unless the item is already selected.

# Using the Keyboard to Work with Page Controls

This topic describes examples of how to use the keyboard to work with various controls in the interface and select actionable items. Controls are UI constructs such as buttons, accordions, page tabs, and so on.

## Buttons

This section describes how to use the keyboard to control buttons in the global header or on pages.



Key	Description
Enter, Space, or Down Arrow	Open the menu.
Esc	Close the menu.

## Calendar

This section describes the hot keys you can use when working with the calendar control and date picker to select date field values.

Auto Number Rule | Electrical Permit 🔍

\* Valid from Date  📅

Valid to Date 📅

Public User Enabled

\* Department

Workflow Space Name

Workflow Application ID

< July 2018 >

M	T	W	T	F	S	S
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

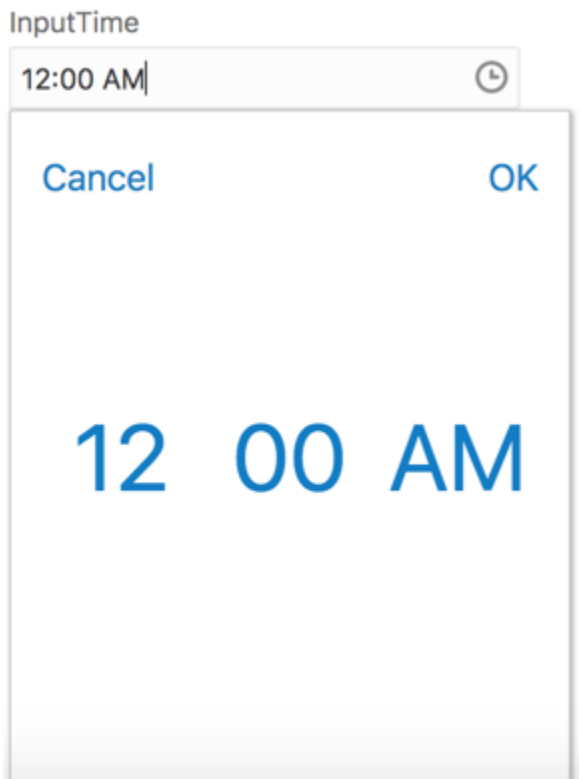
Today

Target	Key	Description
Input Element	Down Arrow or Up Arrow	Shows the calendar grid and moves the focus into the expanded grid
	Esc	Close the grid.
	Tab In	Set focus to the input. If hints, title or messages exist in a note window, displays the note window.
Picker	Enter	Select the currently focused day
	Up Arrow	Move up in the grid.
	Down Arrow	Move down in the grid.
	Right Arrow	Move right in the grid.
	Left Arrow	Move left in the grid.

Target	Key	Description
	Esc	Close the grid.
	Home	Move focus to first day of the month.
	End	Move focus to last day of the month.
	Page Up	Switch to previous month.
	Page Down	Switch to next month.
	Alt+Page Up	Switch to previous year.
	Alt+Page Down	Switch to next year.
	Ctrl+Alt+T	Places focus on the Today button if it exists.

## Time

This section describes the hot keys you can use when working with the time picker control to select time field values.



Key	Description
Down Arrow or Up Arrow	Shows the time picker and moves the focus into the expanded time picker
Tab In	Set focus to the input. If hints, title, or messages exist in a note window, displays the note window.

## Accordion

This section describes the hot keys you can use when working with the accordion control to expose and access items. An accordion is a set of expandable sections where only one section can be expanded at a time. When a new section gets expanded, the previous section automatically closes.

### Elements

- ▶ Predefined Elements
- ▲ User-Defined Elements
  - Group box
  - Text field
  - Number field
  - Date time field
  - Switch
  - Text area
  - Radio button set
  - Check box set
  - Drop-down list
  - Multi-Select list

The following table lists the keyboard options for working with the collapsible headers.

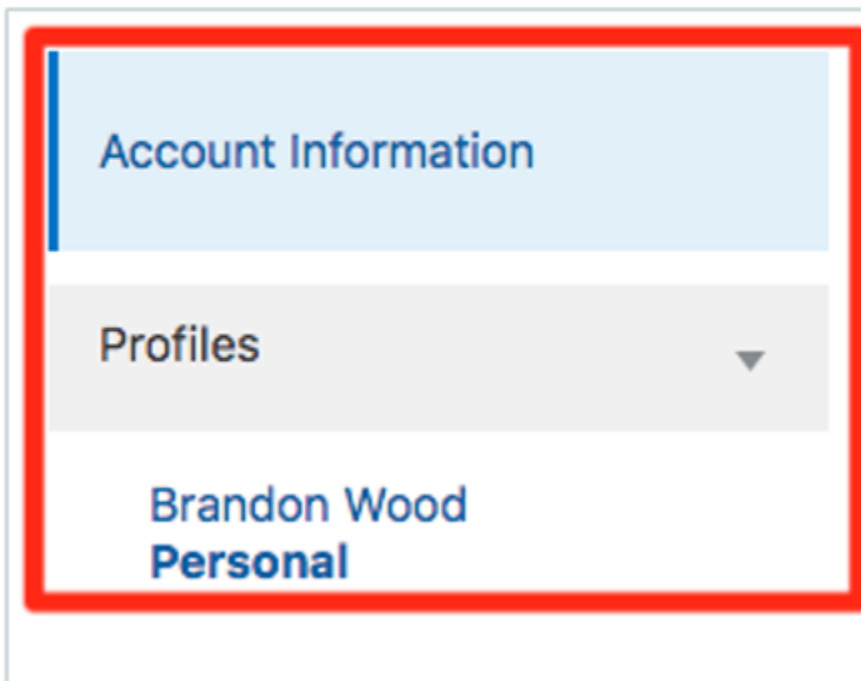
Key	Description
Space or Enter	Toggle disclosure state.
Tab	Navigate to next collapsible header and if none then the next element on page.
Shift+Tab	Navigate to previous collapsible header and if none then the previous element on page.
Up Arrow or Left Arrow (Right Arrow in right-to-left languages)	Move focus to the previous collapsible header with wrap around.

Key	Description
Down Arrow or Right Arrow (Right Arrow in right-to-left languages)	Move focus to the next collapsible header with wrap around.
Home	Move focus to the first collapsible header.
End	Move focus to the last collapsible header.

## Navigation Lists

This section describes how to use the keyboard to work with navigation lists to access items used take you to different locations or display additional content.

# Manage Account



The following table lists the keyboard options used for accessing list items.

Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.

Key	Description
Down Arrow	Moves focus to the next visible list item
Right Arrow (Left Arrow in right-to-left languages)	For horizontal navigation list, focus will be moved to next visible item.
Left Arrow (Left Arrow in right-to-left languages)	For horizontal navigation list, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Shift+Tab	Move focus to hierarchical menu button. Only applicable for sliding navigation list and when hierarchical menu button is enabled.

## Tab Bars

This section describes how to use the keyboard to work with tab bars.



Key	Description
Enter or Space	Selects list item.
Up Arrow	Moves focus to the previous visible list item.
Down Arrow	Moves focus to the next visible list item
Right Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to next visible item.
Left Arrow (Left Arrow in right-to-left languages)	For horizontal tab bar, focus will be moved to previous visible item.
Home	Moves focus to the first visible list item.
End	Moves focus to the last visible list item.

Key	Description
F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
Esc	When F2 mode is enabled, press Esc to exit F2 mode.
Ctrl+X	Marks the current item to move if the reorderable feature is enabled.
Ctrl+V	Paste the item that are marked to directly before the current item
Delete	Delete the current item.