Oracle Public Sector Permitting and Licensing

Using Community Development Code Enforcement

26C

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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*.

Thanks for helping us improve our user assistance!

2 Managing Public Users

The Public User Registration Process

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

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

Here is a summary of the registration process:

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

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

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

Entering Account Details

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

Page Element	Description
Hide contact information from public view	Turn on the switch to hide the registrant's name and contact information when a member of the public views their applications. 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. **Note:** Even when the registrant's own information is hidden, the property addresses for all applications are visible to the public.

Page Element	Description
First Name and **Last Name**	Enter the registrant's name, which will appear on the account profile created by the registration process.
Email Address and **Confirm Email Address**	Enter an email address that will be associated with the registrant's account. Enter the email address again to confirm. **Note:** The registrant's email address is their user name or user ID. There is no separate user name or user ID to sign in. 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.
Phone	Select the phone type by clicking **Mobile**, **Work**, or **Home**. Mobile is the default option. Depending on agency setup, a mobile number is needed to opt into multifactor authentication using a phone. Enter the phone number and extension, if any. The country displays *US* for the United States, and the phone number field displays *+1* (plus one) to indicate the country prefix for the United States.
Address	The country or region is currently displayed is *United States*. Enter the address information: • Address Line 1 and Address Line 2: The first and second lines of the street address. • City, State, and Postal Code **Note:** The applicant's address is required.
IVR access code (interactive voice response access code)	Add a 4-digit PIN that is required when public users accessing inspections for applications using the agency's interactive voice response (IVR) system. The code is masked on this page, and you can't see this code again even after registration is complete. Users who forget their code can reset it on the account management page. For information about entering a new code after registering, see *Managing Public User Accounts*. This field appears only if the agency has enabled IVR access codes on the Public User Setup page. See *Setting Up Public Users*. When you enable the **IVR Access Code** field, help information indicates that you can access permit and business license information and manage your inspection schedule by phone, but you need this 4-digit access code each time. If you forget the code, you can reset it on the account management page.
Business Name and **Business Title**	Enter the business name and business title for the registrant. These fields are optional.

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

Agreeing to Terms and Conditions

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

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

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

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

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

Completing Registration by Resetting the Password

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

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

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

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

   Although the page name suggests that the user is resetting a password, the user is actually creating a password for the first time.
4. The user enters a password and confirms it, then clicks the **Submit** button.
5. The system creates the password, completing the registration process.
6. The user signs into the Oracle Permitting and Licensing landing page for registered public users to access their account.

Accessing Public User Account Information

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

Security Details for Managing Public User Accounts

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

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

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

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

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

Account Management Navigation for Agency Staff

Agency staff accesses the Manage Account page using these steps:

1. Select **Public User** > **Public User Access**.
   The Public User Access page displays summary information about public user accounts. The list includes information such as the person's name, email address, and whether the account is active.
   A condition link (such as Lock, Hold, or Notice) indicates that the account is subject to one or more conditions. Conditions on an account may prevent certain actions or issue warnings when the actions are attempted. To see the condition summary, click the condition link. For example, click the **Lock** link to view details about the applied condition or conditions. For more information, see *Managing Account Conditions*.
2. Search for the desired user account.
3. Click the row for the desired user account to open the Manage User Account page.
   For more information, see *Managing Public User Accounts*.

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

   For more information, see *The Public User Registration Process*.

Account Management Navigation for Registered Public Users

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

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

   A drop-down menu appears.
3. Select **Manage Account**.

For more information, see *Managing Public User Accounts*.

Managing Public User Accounts

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

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

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

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

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

Managing General Account Information

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

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

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

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

   Here's how to add or update information.

Page Element	Description
Name	Click the **Name details** pencil button to open the **Name details** drawer. Update fields including first, middle, and last names, initials, suffix, and title. The **Display Name** is generated from the name fields. Turn on the **Hide contact information from public view** switch to hide the registrant's name and contact information when a member of the public views the registrant's applications. This switch appears only if enabled by the agency on the Public User Setup page.
Access	Click the **Access details** pencil icon to open the **Access details** drawer. Enter a number in the **IVR access code** field. The **User Name** and **Email** fields are display-only and reflect the email address entered during the registration process.
Business information	Click the **Business information details** pencil icon to open the **Business information details** drawer. Enter a business name and business title.
Address	Click the **Add Address** button to enter a home or business address. Turn on the **Default** switch to designate the address as the default selection. Click the row to update the address.
Phone	Click the **Add Phone** button to enter a phone number. Select the phone type by clicking **Mobile**, **Work**, or **Home**. Mobile is the default option. Depending on agency setup, a mobile number is needed to opt into multifactor authentication using a phone. Turn on the **Default** switch to designate the phone number as the default selection. Click the row to update the phone.
Email	Click the **Add Email** button to enter a home or work email address. Turn on the **Default** switch to designate the email address as the default selection. Click the row to update the email.

Page Element	Description
Contacts	Contacts are people who can interact with the agency regarding business related to the associated account. Click the **Add Contact** button to enter information for an account contact, including name, business, email, street address, and phone. **Note:** When applicants enter contact information in an application, they can create new contacts or choose existing account contacts. When creating a new application contact, the user can indicate whether the new contact should also be added to the account. When choosing an existing account contact, the applicant can modify contact details and indicate whether the original account contact information should be updated as well. For more information, see *Working with Application Contacts*. Click the row to update a contact.
Conditions	View conditions that have been applied to the person with the associated account. Only agency staff can apply and resolve conditions. Click the row to view the conditions. Agency staff can add or resolve conditions by clicking the **Conditions** pencil icon to open the Conditions page. For information about adding and managing conditions, see *Managing Account Conditions*.
Attachments	View and upload files as attachments to the account. Your agency controls whether attachments can be added to accounts on the Public User Setup page. Click the row to view the attachment. For information about adding and managing attachments, see *Working with Application Attachments*.
Terms of use	Click the terms of use link to review the terms and conditions that the registrant accepted. For more information, see *Setting Up Terms of Use*.

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

Overview of Public Landing Pages

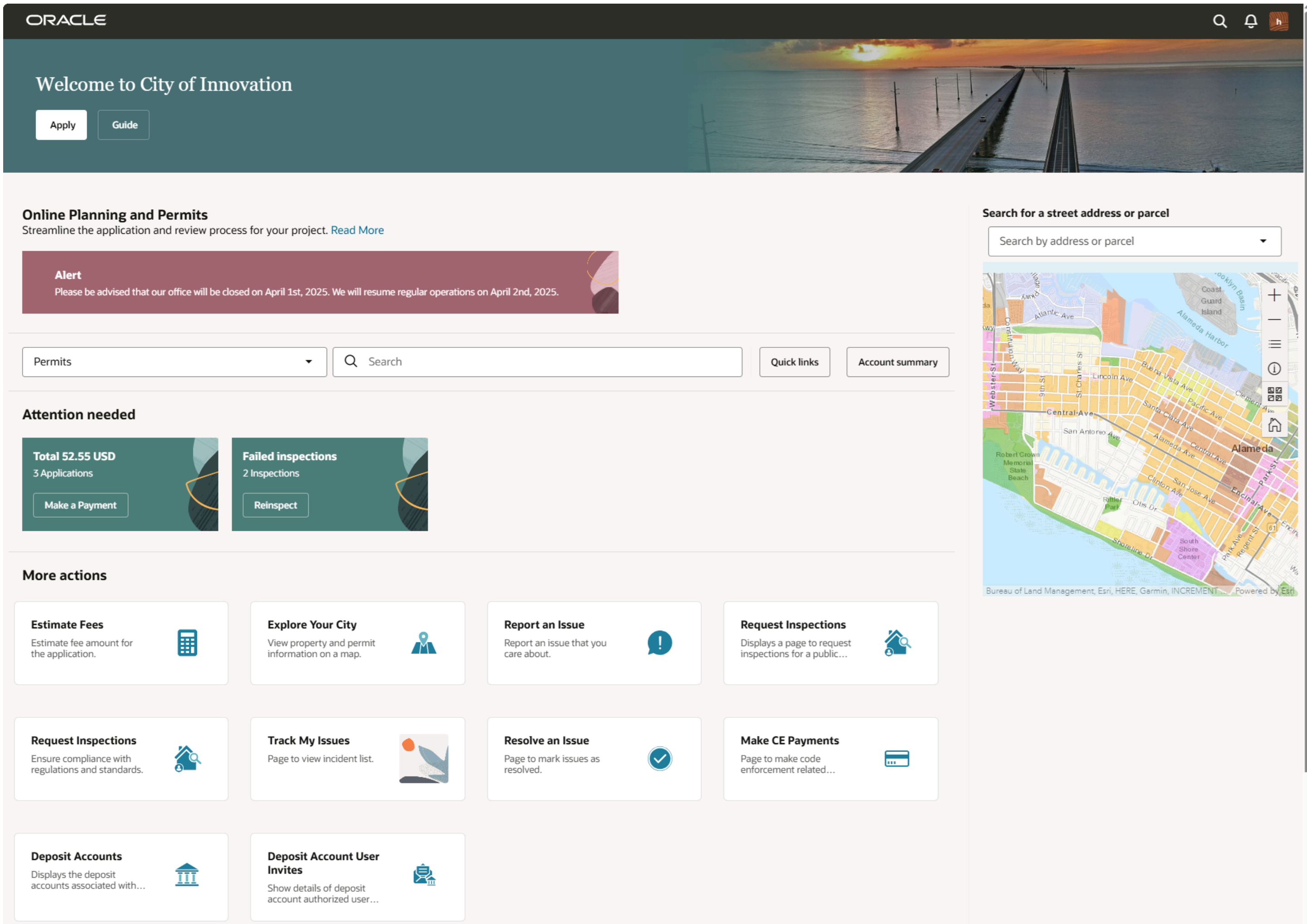
The public landing pages give members of the public access to agency services. There are two separate public landing pages, one for anonymous users (guests), and one for registered users who have signed in.

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.
Search for a street address or parcel
Search by address or parcel
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...

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
Public Reports	Provides access to all public reports available for the anonymous user only.
Estimate Fees	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.
Explore Your City	Provides access to a map where the anonymous user can search for and view property details, including applications related to the property. This action tile is also available on the public landing page after logging in.
Report an Issue	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 *Reporting Issues*.
Make CE Payments	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 *Making Code Enforcement Payments*

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

Attention Needed Cards

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

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

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

Card	Description
Make a Payment	Provides the fees information at a glance and a button to go directly to the payment page when the registered user has a pending payment. 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 *Making Payments*.
Failed Inspections	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 **Reinspect** button opens the registered user's My Inspections page with a filter to show only failed inspections for active applications that need to be scheduled for reinspection. For more information, see *Reviewing Inspection Details*.

3 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
All	Displays worklist tabs available to the user across enabled offerings. Best for users who work across multiple offerings
License	Displays license-related worklist tabs, such as unassigned license applications, my license applications, incoming tasks, and my tasks. For more information see *Using the License Worklist*.
Code Enforcement	Displays code enforcement worklist tabs, such as inspections, access requests, unassigned incidents, incidents, notices, hearings, unassigned cases, and cases etc. For more information see *Using the Code Officer Worklist* and *Using the Code Technician Worklist*.
Permits	Displays permit-related worklist tabs, such as incoming tasks, my tasks, plan reviews, faulted transactions, and alerted tasks. For more information see *Using the Permits Worklist*.
Planning and Zoning	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*Using the Planning and Zoning Worklist*.

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
Worklist dropdown	Allows users to switch between All, License, Code Enforcement, Permits, and Planning and Zoning.
Tabs	Display the worklist tabs available for the selected offering.
Tab count	Displays the number of records. **Note:** 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.
Search	Allows users to search records in the selected tab.
Filters	Help users filter the results by the available values.
Results table	Displays records for the selected tab. Columns vary by offering and tab. Select a row to open the corresponding details page of that application.
Actions menu	Provides row-level actions based on the selected record and user permissions.
Export button	Allows users to export or download table data.
Customize Columns button	Allows users to manage visible table columns.
Edit Page Layout	Allows users to personalize the page layout by adding or arranging available KPIs.
Reset to Default	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.

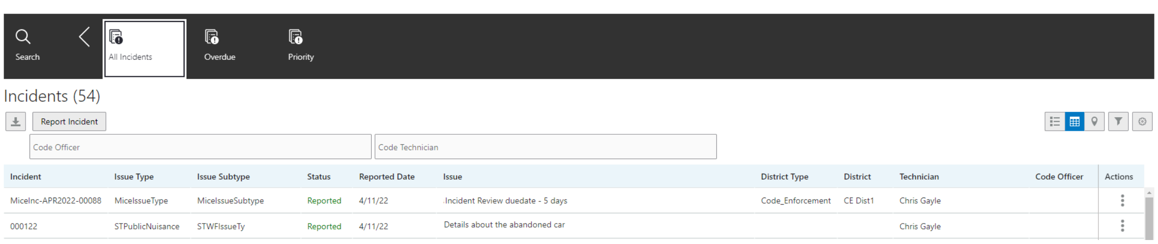
Tab	Subtab	Map Shows
All Incidents	• Overdue • Priority	Incident name, issue type and subtype, and status.
All Notices	• Notice of Violation • Notice of Citation • Ad Hoc • Ready to Mail	Not applicable.
All Hearings	-	Not applicable.
All Access Requests	-	Not applicable.

Grid-level Filter

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

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

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



Tabs on the Code Technician Worklist

The code technician worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
Incoming Incidents	Unclaimed incidents. These are incidents in *Reported* status that do not have an assigned technician. This tab includes: • A **Report Incident** button which provides quick access for the user to report a new incident from the worklist. For details on reporting incidents, see *Reviewing Incident Lists*. • A map view for displaying incident locations. **Note:** If automatic routing is active, this tab displays only incidents in the user's area of responsibility, as established by the Issue Type and Issue Subtype attributes for the Code Enforcement Technician or Code Enforcement Supervisor job functions. If there are no unassigned incidents in a technicians areas of responsibility, the Worklist tab order changes to show Incidents as its first tab.	• Claim (code enforcement technicians) • Assign (code enforcement supervisors)	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. For more information, see *Claiming and Assigning Incidents*. The **Overdue** subtab shows unclaimed incidents with a due date before the current date. The **Priority** subtab shows unclaimed incidents where the **Priority** switch is enabled.
All Incidents	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. The list also includes reassigned incidents from the administrator or from another staff member. This tab includes: • A **Report Incident** button which provides quick access for the user to report a new incident from the worklist. • A map view for displaying incident locations.	• Schedule Inspection • Mark as Duplicate • Reassign • Release • Reroute Incident • Close	The actions that are available here are also available from the incident detail page. For more information, about taking action on incidents, see *Processing Incidents*. Completing any of the available actions removes the incident from this tab. The **Overdue** subtab shows claimed incidents with a due date before the current date. The **Priority** subtab shows claimed incidents where the **Priority** switch is enabled.
Incidents	Unprocessed incidents (those in *Reported* status) where the current user is the assigned technician.	Same as above	

Tab	Displays	Available Actions	Additional Information
All Notices	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. Notices are separately listed as notice of violations, notice of citations, and ad hoc notices. Violation and citation notice object records are created for violations and citations respectively.	Tabs: Notice of Violation, Notice of Citation, and Ad Hoc: • Generate • Continue Tab: Ready to Mail: • Download to Print • Update Mailing Details • Mark as Sent	The notices are classified in the four subtabs – Notice of Violation, Notice of Citation, Ad Hoc, and Ready to Mail. The *Generate* 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. Once a notice is in Generated status, it moves to the **Ready to Mail** tab. The *Continue* action signifies that the notice is generated, and you can make changes to the details before printing it. Any changes made to the notice process will automatically update the case detail pages. A citation notice additionally contains information about the citation fees. The **Download to Print** action downloads the report in a separate tab, ready to print. The **Update Mailing Details** action opens the mailing details modal page to update the tracking details of the notice report. The **Mark as Sent** action changes the status of the notice from Generated to Sent. The record is removed from the Worklist. You can access the Notices page in case details and view the detail. See Editing Notice Details under *Working with Notices*.
Notices	List of notices from cases that are assigned to the code technician. Notices are separately listed as notice of violations, notice of citations, and ad hoc notices.	Same as above	
All Hearings	Cases assigned to the logged in technician that have requested appeals or hearings in *Scheduled* status. These include the cases that match the technician's issue type and subtype.	• View and download attachments added by responsible party • Add or delete your own attachments	For details about appeals and hearings, see *Working with Appeals and Hearings*.

Tab	Displays	Available Actions	Additional Information
		• Update Hearing Decision • Reschedule Hearing • Cancel	
Unassigned Cases	Unassigned cases. These are cases that do not have an assigned technician.	• Claim (code technicians) • Multiple Select Claim (code technicians)	When you click the **Claim** button, the case is assigned to you and the row is removed from this list page. The **Multiple Select** button allows you to select multiple cases using checkboxes. Click **Claim** to assign the selected cases to yourself. You can also claim or assign cases to another staff from the Cases list page and the case Overview page. See *Processing Cases* and *Viewing the Case Details Overview*.
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.	• Allow Access • Deny Access **Note:** An email notification is sent to the registered user about the request approval or denial. For details, see *Adding Responsible Parties*	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. Users can't access their case if the agency denies their request.
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	Status options: • Violation • Closed • Compliance • Void • Mandatory Abatement • Legal Once the status of a case changes to *Compliance*, it is removed from the list.
Incoming tasks	List of all the workflow tasks related to incidents and cases that are assigned to the logged in technician or the technician group. Incoming tasks remain in the list until they are closed.	• Claim • Reassign Once claimed, the Actions options allows you to update, release, or reassign the workflow task.	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: • *Update*: Change the status, priority, or review and add comments and attachments. The Update Tasks page allows

Tab	Displays	Available Actions	Additional Information
			you to page through all your tasks and make updates to each task. The Workflow page related to the selected incident or case is updated when you save the changes. • *Release*: Unassign the workflow task from your list. This is available only for My Tasks assignments. • *Reassign*: Change the assignee of the workflow task. This is available only for My Tasks assignments. **Note:** The My Tasks subtab separates the assigned tasks into two subtabs – Assigned Today and Assigned Earlier, depending on the time of assignment. When you reassign a workflow task to another technician, the My Tasks subtab for the assigned technician will list the task. For information on Workflow, see *Using Workflow in Code Enforcement*.

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	• First Inspections: Today, Ready, This Week, and Overdue subtabs. • Reinspections: Ready, This Week, and Overdue subtabs.	Inspection type, ID, issue type and subtype, address, and inspection number.
All Incidents	• Overdue • Priority	Incident name, issue type and subtype, and status.
All Notices	• Notice of Violation • Notice of Citation • Ad Hoc • Ready to Mail	Not applicable
All Hearings	-	Not applicable
All Access Requests	-	Not applicable

Grid-level Filter

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

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

Tabs on the Code Officer Worklist

The code officer worklist has the following tabs:

Tab	Displays	Available Actions	Additional Information
All Inspections	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. Detail page shows the inspection information and provides access to comments, attachments, and code violations. – Indicates that the incident or case is ready for inspection. – Indicates that the case is ready for an early inspection. – Indicates that the date scheduled for the inspection has passed.	Grid-level filters for inspections. List page: • Attachments • Comments • Reroute Incident: Available for incidents on first inspection. Click to edit details and submit. • Reschedule • Cancel • View Details Detail page: • Update Result: *In Compliance*, *Violation*, *Referral*, *Closed* • Reschedule	For details about result options, see *Submitting Code Enforcement Inspection Results*. Submitting the details will create a case with the details provided.
Inspections	List of all inspections assigned to the logged in officer.	Same as above	Same as above
First Inspections	List of all new inspections assigned to the officer. Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.	Same as listed above.	See the next section.
Reinspections	List of reinspections. These are the follow-up inspections after the first inspection is complete with a result. Detail page shows the inspection information and provides access to comments, attachments, and applicable code violations.	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	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. The list also includes reassigned incidents from the administrator or from another staff member. This tab includes: • A Report Incident button that provides quick access for the user to report a new incident from the worklist. • A map view for displaying incident locations.	• Schedule Inspection • Mark as Duplicate • Reassign • Release • Reroute Incident • Close	The actions that are available here are also available from the incident detail page. Completing any of the available actions removes the incident from this tab. The **Overdue** subtab shows claimed incidents with a due date before the current date. The **Priority** subtab shows claimed incidents where the Priority switch is enabled.
Incidents	List of all incidents assigned to the logged in officer.	Same as listed above.	
All Notices	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. Violation and citation notice object records are created for violations and citations respectively.	Tabs: Notice of Violation, Notice of Citation, and Ad Hoc: • Generate • Continue Tab: Ready to Mail: • Download to Print • Update Mailing Details • Mark as Sent	The notices are classified in the four subtabs – Notice of Violation, Notice of Citation, Ad Hoc, and Ready to Mail. The *Generate* 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. Once a notice is in Generated status, it moves to the **Ready to Mail** tab. The *Continue* action signifies that the notice is generated, and you can make changes to the details before printing it.

Tab	Displays	Available Actions	Additional Information
			Any changes made to the notice process will automatically update the case detail pages. A citation notice additionally contains information about the citation fees. The **Download to Print** action downloads the report in a separate tab, ready to print. The **Update Mailing Details** action opens the mailing details modal page to update the tracking details of the notice report. The **Mark as Sent** action changes the status of the notice from Generated to Sent. The record is removed from the Worklist. You can access the Notices page in case details and view the detail. See Editing Notice Details under *Working with Notices*.
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 *Scheduled* status. These include the cases that match the officer's district type and ID.	• View and download attachments added by responsible party • Add or delete your own attachments • Update Hearing Decision • Reschedule Hearing • Cancel	For details about appeals and hearings, see *Working with Appeals and Hearings*.
All Access Requests	Cases assigned to the logged in officer that have pending requests from registered public users who have asked for online access to the case. These include the cases that match the officer's district type and ID.	• Allow Access • Deny Access • Edit Details	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. Users can't access their case if the agency denies their request.
Assigned Cases	List of all the cases assigned to the officer for inspections, as well as the auto-assigned ones. Detail pages show the complete details of the case.	List page: **Create Case**: Create a new case. **Actions**: Select and choose from options *Attachments*, *Comments*, and *Update Status*.	For information about case details, see *Processing Cases*.

Tab	Displays	Available Actions	Additional Information
Completed Inspections	List of all inspections with status as *Completed*. Detail page shows the inspection information and provides access to comments, attachments, code violations, and notices.	None	See the next section.
Incoming Tasks	List of all the workflow tasks related to incidents and cases that are assigned to the logged in officer or the officer group. Incoming tasks remain in the list until they are closed.	• Claim • Reassign Once claimed, the Actions options allows you to update, release, or reassign the workflow task.	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: • **Update**: Change the status, priority, or review and add comments and attachments. The Update Tasks page allows you to page through all your tasks and make updates to each task. The Workflow page related to the selected incident or case is updated when you save the changes. • **Release**: Unassign the workflow task from your list. This is available only for My Tasks assignments. • **Reassign**: Change the assignee of the workflow task. This is available only for My Tasks assignments. When you reassign a workflow task to another officer, the My Tasks subtab for the assigned officer will list the task. For information on Workflow, see *Using Workflow in Code Enforcement*.

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
Unassigned Applications	Business license applications that do not have an assigned specialist. Subtabs to Unassigned Applications: • Consultation Applications • Origination Applications • Amendment Applications • Renewal Applications This tab includes a map view for displaying application locations.	**Assign** Individual: Click the Actions menu for the application row and select Assign. On the Assign Specialist page, select a specialist and click Save. 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. **Claim** Individual: Click the Actions menu for the application row and select Claim. Bulk: Click the Multiple Select button and select the applications using checkboxes. Click Claim. **Copy Application** 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 *Copying an Application*. **Cancel Application** 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. The **Cancel Application** action is available only for the applications in the *Pending* status.	This tab is visible only to users who have the Business License Specialist (ORA_BL_SPECIALIST) Job Function assignment. Assigning an application removes it from this tab and appears on the assigned specialist's My Applications tab. 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. For more information, see *Working with Application Conditions*.

Tab	Displays	Available Actions	Additional Information
		Withdraw Application 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. The **Withdraw Application** action is available from the submission of the application until its completion. The statuses in which an application can be withdrawn are: • *Accepted* • *In process* • *Inspection* • *License issuance*	
My Applications	Submitted and In Process business license applications that are assigned to the current user. Subtabs to My Applications: • Consultation Applications • Origination Applications • Amendment Applications • Renewal Applications Comments and attachments pertaining to this application. This tab includes a map view for displaying application locations.	• **Send Message** See *Working with Communications*. • **Reassign** See *Working with Specialists*. • **Copy Application** See *Copying an Application*. • **Update Description**	Review or add your own comments and attachments. See *Working with Application Attachments* and *Working with Comments*. Reassigning an application to a different user removes it from this tab. 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. 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. For more information see, *Working with Application Conditions*.
Incoming Tasks	All active applications assigned for the group. Subtab for Incoming Tasks: My Tasks	If the incoming task is for the group then the specialist has the following actions: • **Claim** • **Reassign**	If you update the task by assigning or reassigning to another specialist, the workflow task – **Assign Specialist** will be updated to the Specialist Assigned status using the Business Rules Framework configuration.

Tab	Displays	Available Actions	Additional Information
	• Assigned Today • Assigned Earlier	If the task is already assigned to the logged in specialist, then the specialist has the following actions: • **Update** • **Release** • **Reassign** • **Withdraw**	When you withdraw a task for a record, the workflow activity is updated accordingly. For more details, see *Using Workflow*.
Calendar	Shows the meeting schedules for the agency on a calendar or on a list.	• View consultation meetings assigned to the specialist logged in. • View all meeting schedules.	Calendar View shows the meetings scheduled for the month. You can choose to view the calendar by month, week, or day. List view shows the list of all consultation meetings. See the section *Viewing Meetings on the Calendar* in *Working with Meetings*.

> **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
Incoming Tasks	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.
My Tasks	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.
Plan Reviews	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.
Faulted Transactions	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.
Alerted Tasks	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.
Billing Account	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:
    - **Task Name**
    - **Application ID**
    - **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
Unassigned Planning Applications	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.
Planning Applications	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 **Planner** and **Type** filters to refine the list.
Planning Activities	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.
Plan Reviews	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.
Incoming Tasks	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.
My Tasks	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
Application ID	The planning application number. Click the link to open the application details page.
Application Type	The type of planning application.
Status	The current application status.
Condition	A link to condition information, when conditions apply.
Fees	A link to fee information, when fees apply.
Planner	The planner assigned to the application.
Address	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
Overdue	Shows activities that are past due.
Due Today	Shows activities due today.
Due This Week	Shows activities due during the current week.
Due Next Week	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
Application ID	The planning application associated with the plan review. Click the application ID to open the application details.
Application Type	The type of planning application.
Due Date	The plan review due date.
Overdue	Displays an icon when the plan review is overdue.
Cycle	The plan review cycle.
Property	The property associated with the planning application.
Condition	Condition information for the application, when applicable.
Balance (USD)	The application balance.

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

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

4 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.

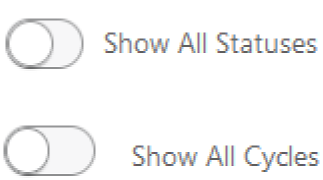
Depending on your agency's implementation, grids may be displayed in a condensed or expanded format. These grid formats determine which controls are available:

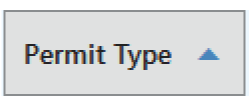
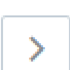
- *Condensed* – Displays multiple data elements in a single column. This is the default format for public users.
- *Expanded* – Displays only one data element per column and provides user-level personalization options. This format and personalization options are only for agency staff.

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.
	Some grids may have additional options available to control data displayed in a grid. For example, the **Show All Statuses** switch is available on the Transactions page and the **Show All Cycles** switch is available on the Plan Reviews page.
	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.
	Click the filter button to open the filter options, where you can define, modify, and save your own filters. The **Filter By** panel opens and you can select from the various advanced filter options to refine your search. All visible fields in the grid can be filtered. See the "Using the Advanced Filter" section in this topic for more information about the **Filter By** panel.
	Click the List View button to view the records in a list.
	Click the Sort button, available only In the list view in the condensed grid format, to select the field by which you want to sort the rows. The available sort fields depend on the fields in the grid. When you first select a field to sort, the sorted rows appear in ascending order. To view sorted rows in descending order, click the sort icon next to the selected field again. Click the sort icon again to return to the original sort order. In the condensed grid format, the sort appears on each column.
	Click the Grid View button to view the records in a grid.
	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. 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. The location or property information column also uses sorting logic that accounts for the street name followed by the street number.
	View the inventory of records on an interactive map. 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. The search and filter options in the map view are the same options that you have in the list and grid views. See *Viewing Map Markers*.
	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.

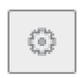
The display settings enable each user to:

- 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.

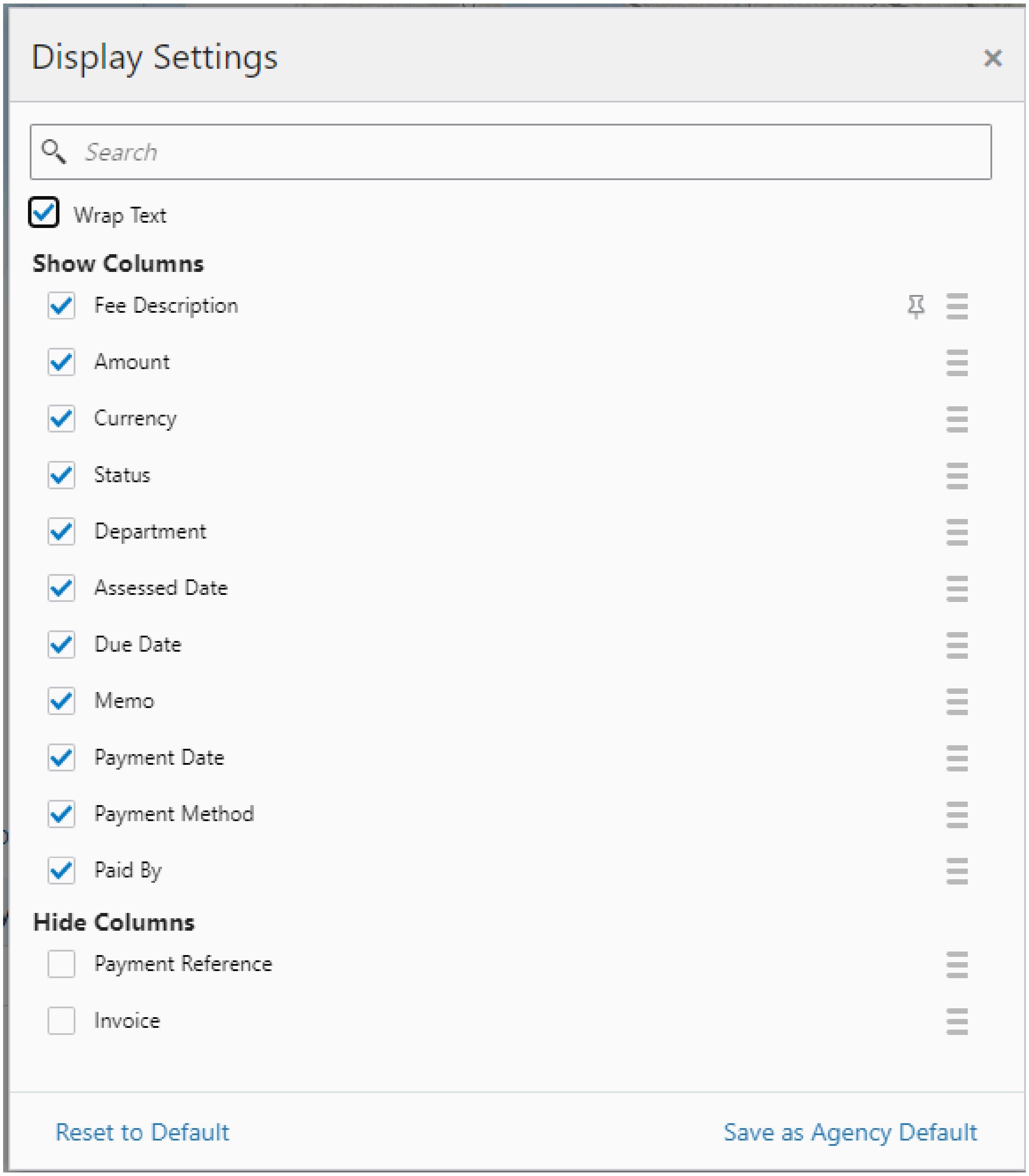
For more information about expanded and condensed grid formats and controls, see *Using Grids*.

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.

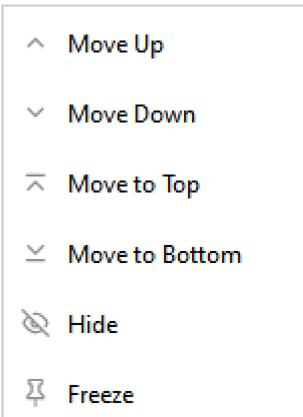
3. Adjust the available display settings.

Page Element	Description
Search	Enter text in the search field to search the columns by name.
Wrap Text	Select the check box to wrap the text in the columns.
Show Columns and **Hide Columns**	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.
Reset to Default	**Agency Staff**: Click to restore the agency default settings, as set by your administrator. If there is no default set up by your agency, then clicking this button will reset to Oracle delivered settings. **Administrators**: Click to revert to the previously set agency default display. If there is no default set up by administrators, then clicking this button will reset to Oracle delivered settings. **Note:** This option is available only for administrators with the job role PSC_MANAGE_COMMONSETUP_PRIV, and applies for the current offering alone.
Set as Agency Default	Click to save the settings as the default display for your agency staff. Administrators need to perform this action for each page that has the agency default personalization setup option. **Note:** This option is available only for administrators with the job role PSC_MANAGE_COMMONSETUP_PRIV, and applies for the current offering alone.

Page Element	Description

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

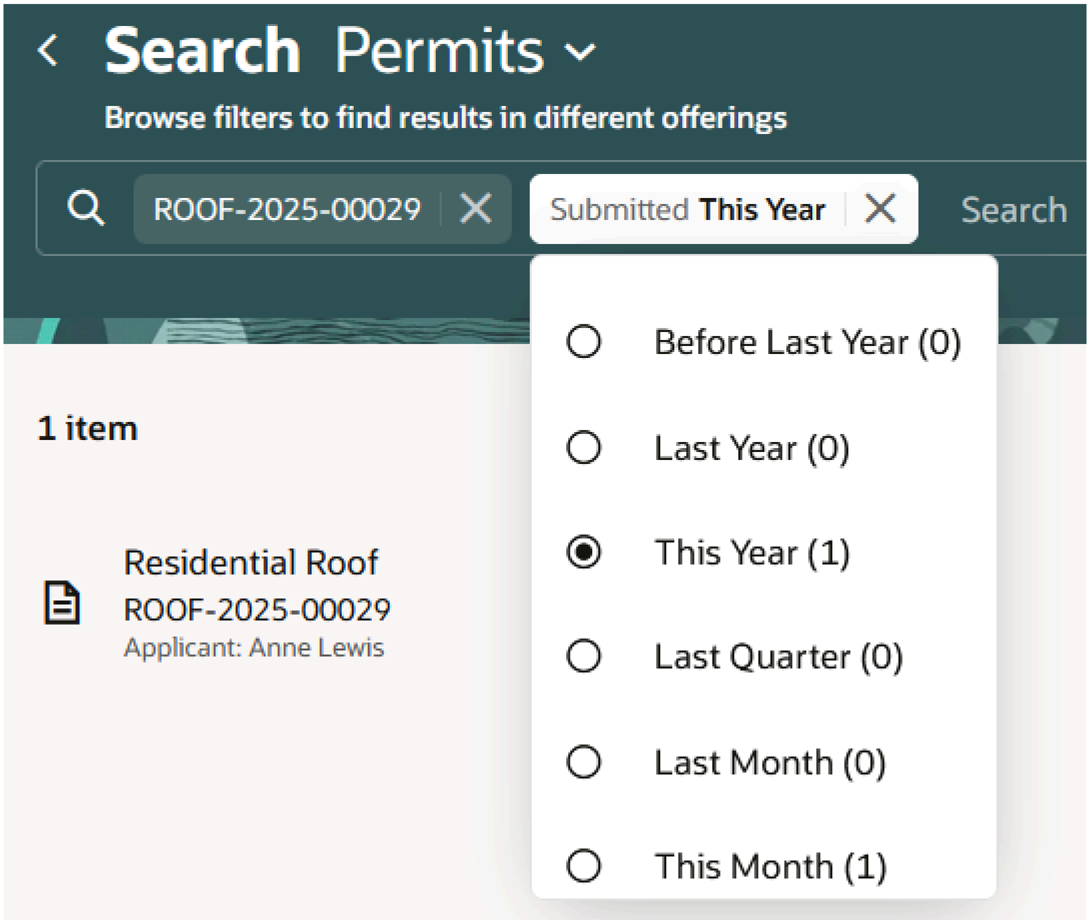
To use search:

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 one 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.

5 Code Enforcement Activities for Public Users

Reporting Issues

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

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

Here is a summary of the issue reporting process:

1. On the public user landing page, the user clicks the **Report an Issue** tile to open the **Select an Issue Type** page.

   For the public user, this page lists the agency's issue types and description. Click the issue type name link to read the complete description of the issue type in a drawer.

   For the agency user, the list displays only the issue types and subtypes linked to the issue types, and not the description.
2. The user can search for an issue type or select one from the list. Click **Select**.

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

   After this point, the user navigates through the remaining steps using **Next** and **Previous** buttons. The user can't go back to choose a different issue type or subtype. If the issue wasn't properly classified, the user needs to cancel the report and start again. If an improperly classified report is submitted, agency staff can reroute the incident and assign a new issue type and subtype.
3. On the **Provide the Location of the Issue** step, the user identifies the location using a searchable map.
   - A crosshairs icon on the map shows the selected location. If location sharing is active, the user's current location appears by default.
   - The user can search for an address or location, and the map adjusts to place the specified location in the crosshairs.
   - The user can pan and zoom the map to identify the issue location more precisely, and the search bar automatically displays the address or the coordinates of the location in the map crosshairs.

     Sometimes the location on the map is identified using a range such as 100-120 Main Street. The user can update the address manually, if necessary.
   - If the location is outside of the agency's boundary, a message instructs the user to change the location to one inside the agency's limits.

     The user will not be able to submit an issue with a location that is outside the agency's boundary.
4. Click the **Next** button. On the **Confirm location** drawer, the user can review the address and add any additional details, such as an apartment number or directions to a specific location at an address. This information

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

Click the **Confirm** button.

5. On the **Tell Us What's Going On** step, the user describes the issue.

   There is a **Reported Date** field available only for the agency users. The agency users can use this field when they have to select a past date as the reporting date.

   > **Note:** The reported date should always be equal to or less than the date on which the selected issue subtype was created. The agency user can only report incidents which has happened within a year. That is, the user can choose a reported date which is less than or equal to 365 days before the current date. See *Setting Up Backdating for Cases and Incidents*.

6. In the **Attachment** section, users can optionally attach photos, videos, audio files, or other attachments. When multiple attachments are added, a search field allows users to enter text to search for and review any attachment.

   Use the three-dot **Actions** menu in each attachment row to select and perform an action. Actions include:

   - *View Details*
   - *Download*
   - *Preview*

   Click the *View Details* action to open an **Attachment details** drawer. Here, view details such as the file name and size, uploaded and updated details, description, and a preview of the image.

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

7. On the **Just a Few More Questions** step, the user answers any additional questions defined by the agency.

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

   When added to the intake form, a **Case Status** drop-down field is available only for the agency users, which allows them to select a case status other than *Violation*. The other available statuses are *Legal* and *Mandatory Abatement*.

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

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

   > **Note:** If the agency configures the system to require contact information from the person reporting the issue, the **Hide my contact information** switch is hidden and contact information is required. For information about this configuration option, see *Setting Up Agency-Level Options for Code Enforcement*.

9. On the **Review** step, the user reviews all of the issue information.

   To make changes to the location, the user can click the **Update** button to go back to the **Provide the Location of the Issue** step. The review page is editable, so the user can make changes to the rest of the sections, and can also use the **Previous** button to return to earlier pages.

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

10. The user clicks **Submit**.
11. A confirmation message with the issue number appears.

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

Tracking Issues

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

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

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

1. The user clicks the **Track Your Issues** button on the public user landing page. This button is visible only after the user signs in.

   The Issues page appears.
2. The user reviews the following information for the issues on the list:

Page Element	Description
Incident Id	Displays the incident ID. The incident type and subtype appear in the second row.
Address	Displays the address for the issue.
Description	Displays the original issue description that was supplied by the person who reported the incident.
Status	Displays the incident status. These are the possible incident statuses: ◦ Reported ◦ Inspection ◦ Compliance ◦ Violation

Page Element	Description
	◦ Closed ◦ Duplicate ◦ Void When an incident results in a notice of violation and the creation of a case, the incident status is based on the case status. So even though the public users do not have direct access to case data, the incident status conveys information about the overall status of the issue. Note that incident statuses are less granular than case statuses. For example, if an incident is in *Violation* status, the corresponding case could be in any of several statuses such as *Violation, Mandatory Abatement,* or *Citation.*
Attachments	Displays an attachment icon. Clicking the icon opens a window with a carousel view of any photos, videos, or other attachments that were uploaded as part of the original issue report.
Submit Date	Displays the date that the issue was originally submitted.

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

   The issue details page has these sections:

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

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

     The public user doesn't have access to the new incident, which was created by the staff member who rerouted the original incident.
   - Click the address link to open the location map in a drawer.
   - A Details section that shows the issue address, description, and whether the issue was reported as posing a health hazard or public safety risk.

     If the person who reported the issue supplied their name, email, and phone, then that information also appears.
   - An Attachments section that displays a carousel view of any photos, videos, or other attachments that were uploaded as part of the original issue report.
   - A Status History section that displays the incident's status history. This section lists the current and previous statuses, along with the date that the status was applied and, if applicable, the reason for the status change.
4. To return to the issues list, the user clicks the **Back** icon in the header.

Making Code Enforcement Payments

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

The person paying the citation must be a registered user. For information on user registration, see*The Public User Registration Process*.

Paying Fees for Case or Citation

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

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

    Note: You can't pay for items in progress or with no balance.
6. On the **Checkout** page, the user selects a payment method and follows the instructions to complete the payment.
7. Once the payment is successful, a confirmation message appears. The fee details are updated in the Fees and Payments page in the case details. Agency staff can view the updated fee details in the Fees and Payments page from the case details. See *Working with Code Enforcement Fees and Payments*.

Resolving Issues

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

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

Requesting Access

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

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

1. On the registered public user landing page, the user clicks the **Resolve Issue** tile.

If there are no cases available for online access, the Request Access to Your Case page is displayed.

2. On the My Cases page, the user clicks the **Request Access** button.
3. On the Request Access to Your Case page, the user enters values provided by the agency in the following fields:

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

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

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

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

Viewing and Resolving Issues

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

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

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

Page Element	Description
Request Access	Click to request access to a case. See the previous section for more information.

Page Element	Description
Case ID	View the identifier of the case that was generated at the time of case creation.
Issue Description	View detailed information about the issue recorded at the time of case creation.
Creation Date	View the date on which the case was created.
Compliance Date	View the date by which the responsible party must ensure compliance.
Case Staus	View the current status of the case.

Viewing Case Details

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

- Request appeal
- Make payment
- View corrective actions
- Add photos and other attachments
- Request an early inspection
- View the assigned code officer's name, and
- View the list of code violations related to the case

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

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

Page Element	Description
Appeal	Click the link to submit an appeal for the issued violation or citation. On the Appeal page, enter a reason for appeal and click **Submit**. A text indicates the number of days left for requesting the appeal. Once the appeal is submitted, the text shows the date on which the appeal was submitted. The period in which an appeal can be submitted is determined by the time rules set up by your agency. See *Setting Up Time Rules*.
View Case Notices	Click the button to view the list of notices in a drawer. Select a notice to view in a format that is set up by your agency.
Make Payment	Click to open the Payment Choice modal and select the preferred payment option. Click Continue to open the Checkout page and pay the case fee.

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

6 Overview of Working with Incidents and Cases

The Issue Lifecycle

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

Incidents, Cases, and Issues

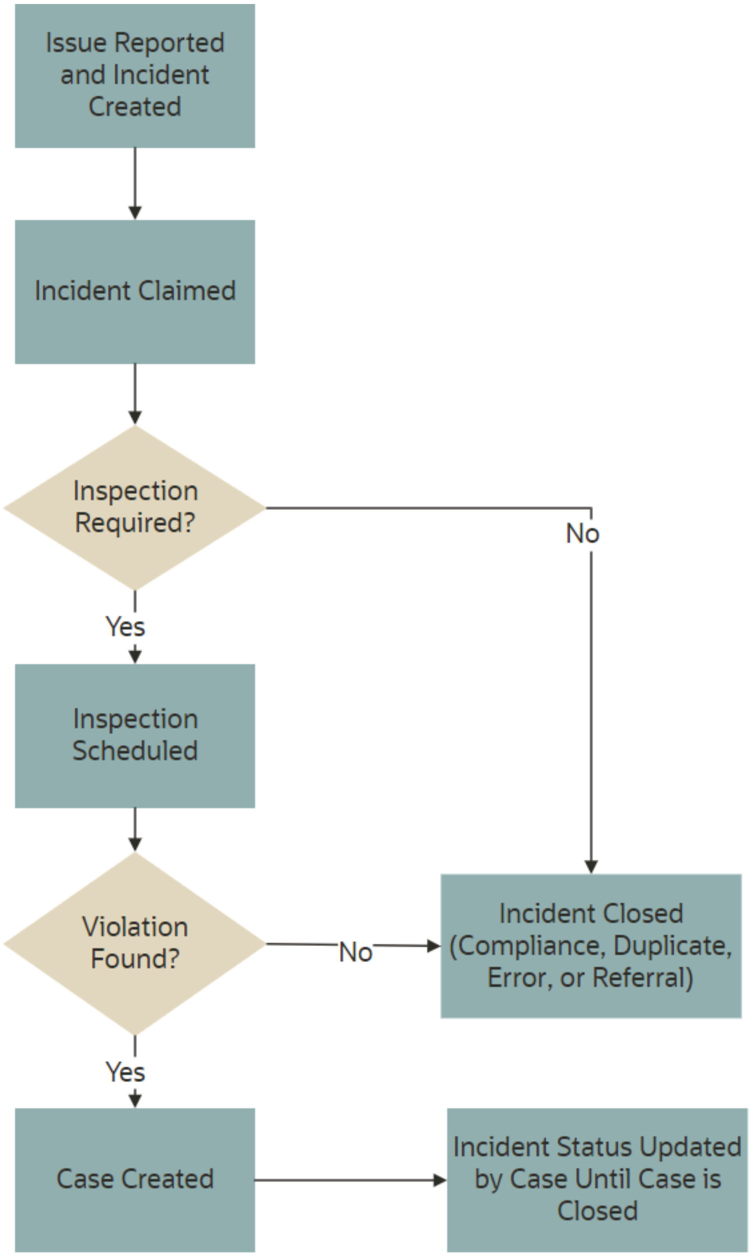
This table explains the different terms that apply to a reported problem.

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

Incident and Case Process Flow

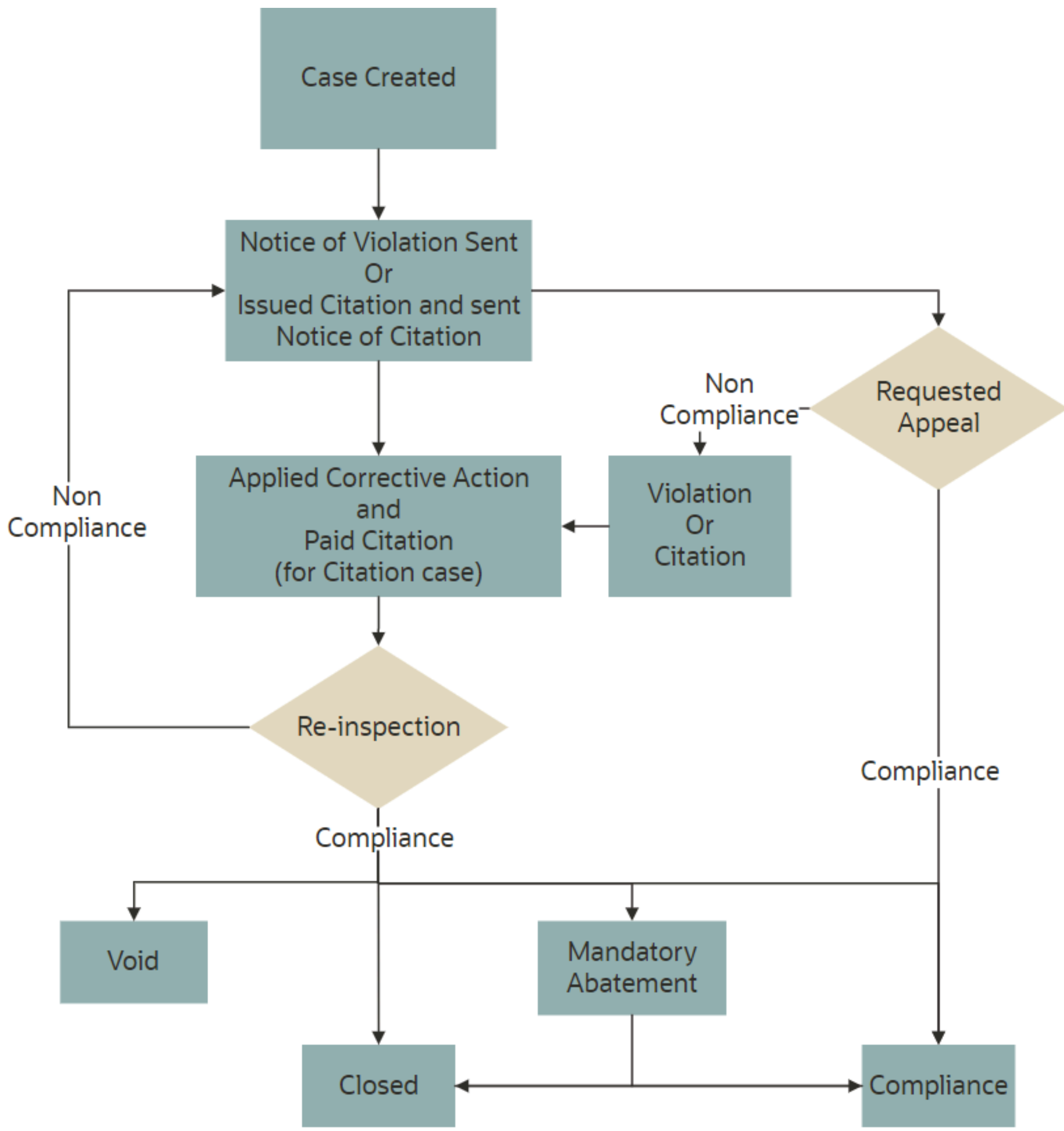
Incidents and cases have their own distinct process flows as illustrated below. Not all issues go through all of these events, but the diagrams provide a general outline of the issue lifecycle.

This diagram illustrates the lifecycle of an incident.



The events in the case lifecycle are illustrated below, although not all cases go through all of these events:

This diagram illustrates the lifecycle of a case.



Time Rules and the Issue Lifecycle

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

For more information about setting up time rules, see *Setting Up Time Rules*.

Reporting an Issue

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

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

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

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

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

For more information about issue reporting, see *Reporting Issues*.

Claiming an Incident

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

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

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

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

For more information about claiming incidents, see *Claiming and Assigning Incidents*.

Reviewing and Processing an Incident

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

Technicians have these options for processing incidents:

- Schedule an inspection to determine if a violation has occurred.

  The technician chooses a date and a code enforcement officer for the inspection.
- Mark the incident as a duplicate of either another incident or a case.

  Technicians can search existing incidents and cases to see if the issue was already reported.
- Close the incident and provide a reason.

  Incidents are closed when they are in compliance, invalid, or when they are referred to another agency to handle the issue.
- Reassign the incident to a different technician.

For more information about the actions that a technician can take, see *Processing Incidents*.

Inspecting the Incident

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

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

For more information about mobile inspections, see *Accessing the Code Officer Application*.

Creating a Case

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

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

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

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

For more information about case details, see *Processing Cases*.

Issuing a Notice of Violation

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

- Compliance date.
- Issue description.
- Responsible party and mailing address.
- Code violations.
  The notices page on the worklist allows you to delete code violations. Code technicians can add code violations from case detail pages.

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

For more information about notices, see *Working with Notices*.

Issuing a Notice of Citation

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

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

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

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

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

For more information about citations, see *Working with Citations*.

Managing Appeals

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

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

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

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

For more information about appeals, see *Working with Appeals and Hearings*.

Making CE Payments

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

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

To pay a fee amount from the landing page:

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

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

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

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

   See *Working with Code Enforcement Fees and Payments*.

Incident and Case Status Updates

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

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

Using Third-Party Integration for Incident Intake

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

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

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

Create Service Request

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

Integration

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

Access Intake Records

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

For information on integration, see *Oracle Integration Cloud Overview*.

Overview of Automatic Routing and Autoassignment

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

Setting Up Automatic Routing and Autoassignment

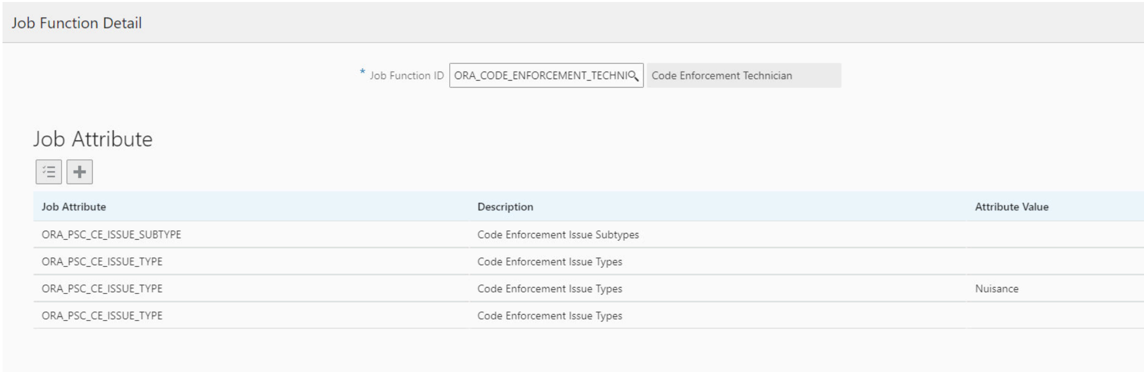
When agencies have automatic routing and autoassignment set up, incidents and cases get automatically routed or assigned to agency staff with the appropriate role and access rights.

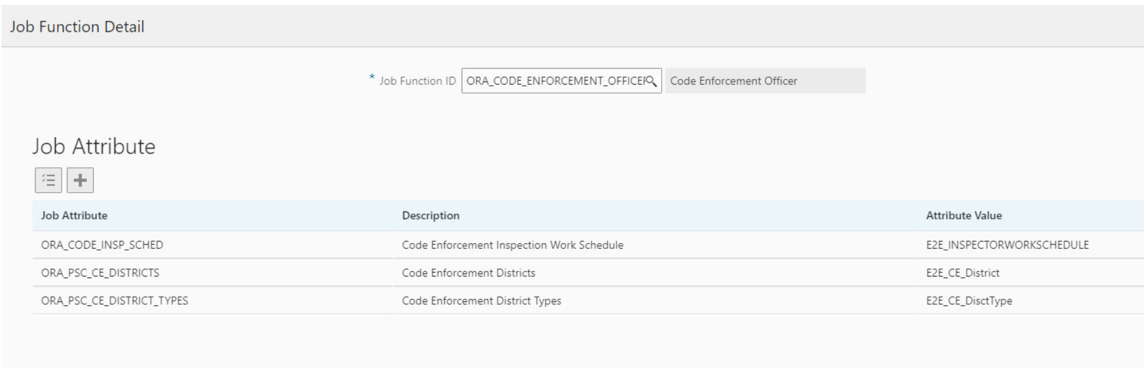
When you set up the job functions for an agency staff, you can assign job specific attributes to an agency staff member. For example, you can assign the job function of a Code Enforcement Technician to an agency staff member and associate attributes such as Issue types and Subtypes. Similarly, you can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

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

- *Setting Up Issue Types*
- *Setting Up Issue Subtypes*
- *Setting Up District Types*
- *Setting Up Districts*

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





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

Role	Responsibility	Setup
Code Enforcement Technician	Responsible for all Issue Types	• Job Function: Code Enforcement Technician • Job Attribute: Issue Type • Attribute Value: Blank
Code Enforcement Technician	Responsible for one or more Issue Types	• Job Function: Code Enforcement Technician • Job Attribute: Issue Type • Attribute Value: Assign specific issue type or issue types
Code Enforcement Technician	Responsible for all Issue SubTypes	• Job Function: Code Enforcement Technician • Job Attribute: Issue SubType • Attribute Value: Blank
Code Enforcement Technician	Responsible for one or more Issue SubTypes	• Job Function: Code Enforcement Technician • Job Attribute: Issue SubType

Role	Responsibility	Setup
		• Attribute Value: Assign specific issue subtype or subtypes
Code Enforcement Officer	Responsible for all District Types	• Job Function: Code Enforcement Officer • Job Attribute: District Type • Attribute Value: Blank
Code Enforcement Officer	Responsible for one or more District Types	• Job Function: Code Enforcement Officer • Job Attribute: District Type • Attribute Value: Assign a specific district type or types
Code Enforcement Officer	Responsible for all districts within a District Type	• Job Function: Code Enforcement Officer • Job Attribute: District Type • Attribute Value: Assign a specific district type
Code Enforcement Officer	Responsible for one or more districts within a District Type	• Job Function: Code Enforcement Officer • Job Attribute: District • Attribute Value: Assign a specific district or districts

Enabling Automatic Routing and Autoassignment

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

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

   The Code Enforcement Options window opens.
5. Under the General Settings section, enable the **Automatically Route Issues** switch.

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

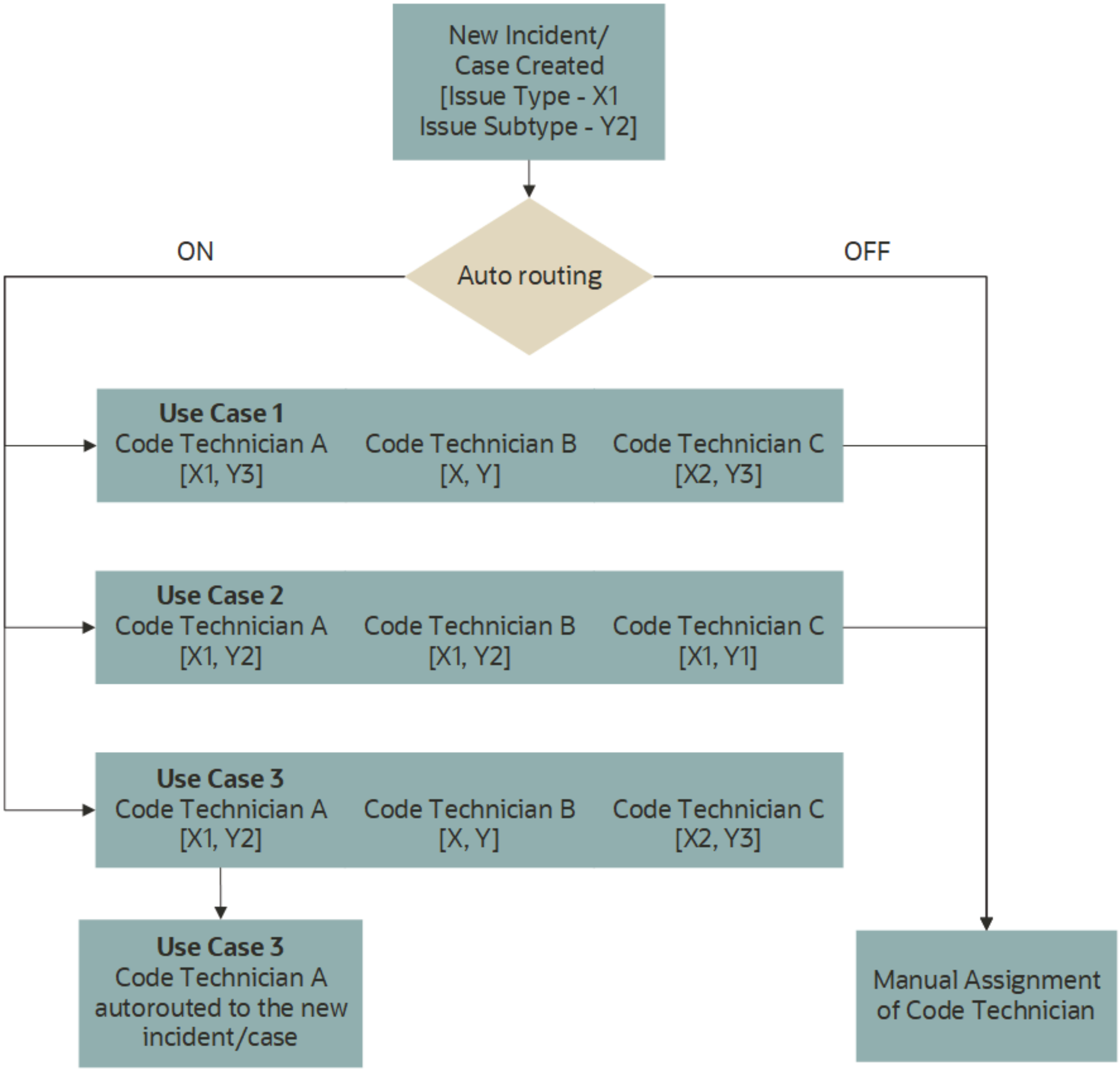
1. Select **Common Setup** > **Agency**.
2. Click a row on the Agency Information tab.
3. Select the **Features** tab.
4. Click **Options** for the *Code Enforcement* offering.

   The Code Enforcement Options window opens.
5. Under the Inspection section, enable the **Autoassignment** switch.

Automatic Routing of Code Enforcement Technicians

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

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



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

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

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

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

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

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

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

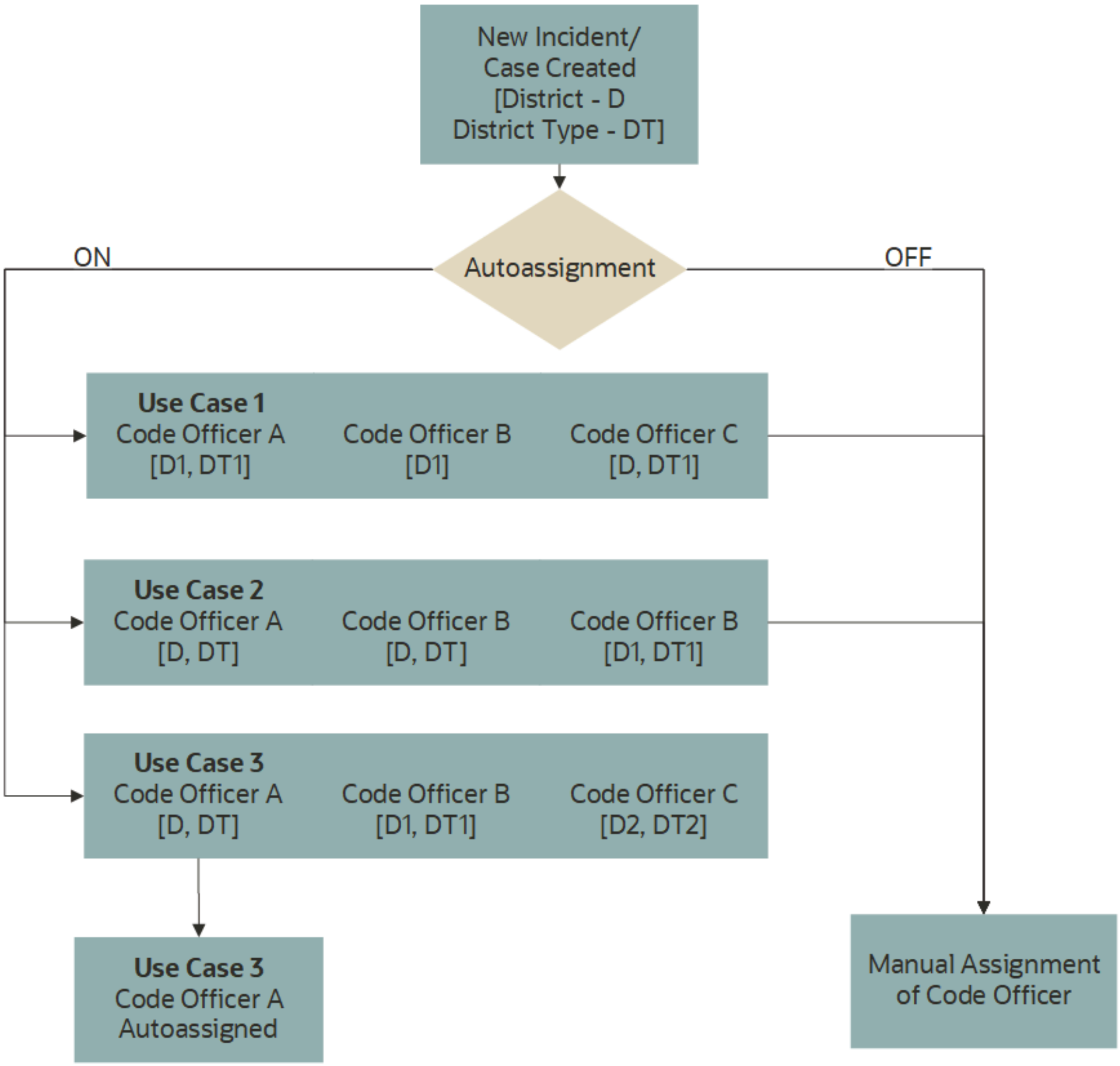
- Users with responsibility for the incident's issue type or subtype.
- Users who are assigned to the incident, regardless of the user's areas of responsibility.
- Supervisors and super users such as a system administrator.

See *Setting Up Agency-Level Options for Code Enforcement* and *Setting Up Agency Staff*.

Autoassigning of Code Enforcement Officers

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

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



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

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

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

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

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

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

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

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

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

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

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

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

For more information, see *Claiming and Assigning Incidents* and *Reviewing and Claiming Cases*.

For more information on agency staff, their job functions and attributes, see *Setting Up Agency Staff*.

For more information on enabling the autoassignment option at the agency level, see *Setting Up Agency-Level Options for Code Enforcement*.

Autoassigning Code Enforcement Officers to New Rerouted Cases

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

7 Managing Incidents

Security Details for Managing Incidents

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

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

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

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

Reviewing Incident Lists

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

You can review incidents from any of the following pages:

- Incidents page
- Code Technician Worklist
- Code Officer Worklist

Reviewing Incidents on the Incidents Page

To review incidents:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Code Enforcement Incidents** tile.
2. To report a new incident, click the **Report Incident** button.

   > **Note:** The availability of the **Report Incident** button is determined by your administrator's settings for the **Restrict Direct Incident Creation** feature on the **Agency Information - Agency Features page**:
   > - If this option is turned off, the **Report Incident** button is available for all code technicians to report incident.
   > - If this option is turned on, the **Report Incident** button is available only to users who have the ADD_STANDALONE_INCIDENT_PRIV privilege. The button is not available for users without this privilege.
   >
   > See *Setting Up Agencies*.

3. Use the **Search** field to filter incidents. By default, the **Active** filter chip is on to display only the active incidents. You can remove the filter chip, enter a search term, such as closed or reported, and click Search. See *Using Search*.
4. If automatic routing or autoassignment is on, choose which incidents to view.

   Both code technicians and code officers can review the incidents list. They can view all the incidents in the system or filter to see only those relevant to their area of responsibility.

Page Element	Description
Relevant Types	Select this button to see only those incidents relevant to the user's area of responsibility.
All Types	Select this button to see all incidents, regardless of the user's area of responsibility.

5. Review the following summary information about incidents:

Page Element	Description
Select check boxes	Use the check boxes to complete multiple reassignments for incidents. Select the check boxes for the incidents and click the **Reassign Code Officer** or **Reassign Code Technician** button.
Incident ID	The incident ID that is assigned based on the agency's autonumbering rules.
Issue Type and **Issue Subtype**	The issue type and subtype for the incident.
Status	The incident status. Unclaimed incidents have a status of *Reported*. Other incident statuses include *Inspection*, and *Violation*.
Reported On	The date on which the incident was created.
Issue Description	A description of the issue.
Address and **City**, **State**	Displays the incident address, city and state.
District Type and **District**	Displays the incident's district type and district.
Code Technician	Displays the name of the Code Technician, if any, assigned to this incident.
Code Officer	Displays the name of the Code Officer, if any, assigned to this incident.
Reopened	Displays the incidents that were reopened.
Actions	Displays the three-dot actions menu. For closed incidents, **View Details** is the only action available. For information about the actions in the menu, see *Processing Incidents*.

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

6. Click the incident row to access the incident details page.
For more information about the Incident details page, see *Working with Incident Details*.

Reviewing Incidents on the Code Technician or Code Officer Worklist

To review incident details on the code technician worklist:

1. From the agency springboard, click the **Code Technician Worklist** tile or **Code Officer Worklist** tile.
2. Access any tab or subtab that displays incidents.
3. To report a new incident, click the **Report Incident** button.
The availability of this button is determined by your administrator's settings for the **Restrict Direct Incident Creation** feature on the **Agency Information - Agency Features page**:
    - If this option is turned off, the **Report Incident** button is available for all code technicians to report incident.
    - If this option is turned on, the **Report Incident** button is available only to users who have the ADD_STANDALONE_INCIDENT_PRIV privilege. The button is not available for users without this privilege.

   See *Setting Up Agencies*.
4. Review the following summary information about incidents:

Page Element	Description
Incident	This column displays: ◦ The incident ID that is assigned based on the agency's autonumbering rules. ◦ The incident type and subtype, separated by a hyphen. ◦ The incident status. Unclaimed incidents have a status of *Reported.* ◦ The date on which the incident was reported.
Issue Type, **Issue Subtype**	The issue type and subtype for the incident.
Status	The status of the incident.
Reported Date	Displays the incident reported date.
Issue	Displays the incident description.
Address, **City**, **District Type**, **District**	Displays the incident address, city, and the incident's district type and district.
Code Technician, **Code Officer**	Displays the name of the technician or code officer to whom the incident is assigned.
Due By	Displays the date by which the review and processing must be complete. (Processing can be scheduling an inspection, marking the incident as a duplicate, or closing the incident.) If processing is already overdue, a warning icon appears next to the date.

Page Element	Description
	The due date is calculated based on your agency's time rules and the date that the incident was submitted.
Attachments	Click the attachments icon to open a window with an carousel-style viewer for attachments. Each attachment appears as a thumbnail of an image (for pictures or videos) or a generic file type icon (such as a PDF icon).
Reopened	Displays a reopened icon for the incidents that were reopened.
Actions	Click the Actions icon to quickly complete the following actions: ◦ Schedule Inspection ◦ Mark as Duplicate ◦ Reassign ◦ Release ◦ Reroute Incident ◦ Close

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

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

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

Claiming and Assigning Incidents

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

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

Claiming an Incident

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

To claim an incident:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Code Technician Worklist** tile.

   Alternately, from the Fusion Applications Permitting and Licensing homepage, click Agency Springboard, and then click the **Code Technician Worklist** tile.

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

   - If automatic routing is off, this tab displays all unclaimed incidents.
   - If automatic routing is on, this tab displays incidents with types and subtypes in the current user's areas of responsibility.
2. Optionally, select the **Overdue** or **Priority** subtab to filter the list of incoming incidents.

   To return from a subtab to the main **Incoming Incidents** tab, click the **Back to Incoming Incidents** icon next to the Search icon.
3. Click the **Claim** button to claim an incident.

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

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

Assigning an Incident

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

To assign an incident:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Code Technician Worklist** tile.

   Alternately, from the Fusion Applications Permitting and Licensing homepage, click Agency Springboard, and then click the **Code Technician Worklist** tile.

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

   - If automatic routing is off, this tab displays all unclaimed incidents.
   - If automatic routing is on, this tab displays incidents with types and subtypes in the current user's areas of responsibility.
2. Optionally, select a subtab to further filter the list of incoming incidents:

   To return from a subtab to the main Incoming Incidents tab, click the **Back to Incoming Incidents** icon next to the Search icon.
3. Click the **Assign Code Technician** button.

   The Assign Code Technician window opens.

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

Page Element	Description
Show All Technicians	This checkbox appears only if automatic routing is on. Select the checkbox to list all code enforcement technicians, regardless of whether their job function attributes match the current incident's issue type and subtype. If automatic routing is not enabled, this checkbox is hidden, and the technician list always includes all technicians.
Name	Displays the names of available technicians.
Incidents	Displays the number of open incidents that the code technician is currently assigned to.

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

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

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

Processing Incidents

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

The following actions are available for processing incidents:

- Schedule Inspection
- Update priority and description
- Update District Info
- Mark as Duplicate
- Reassign
- Release
- Reroute Incident
- Close

Code enforcement technicians access these processing options from an **Actions** menu. This menu appears on:

- The **Incidents** tab of the code technician worklist, which lists incidents where the current user is the assigned technician.
- The **Incidents** list page.

- The **Overview** page of the incident details. See *Working with Incident Details*.

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

Accessing Incident Actions from the Code Technician Worklist

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

1. From the Fusion Applications Permitting and Licensing homepage, click the **Code Technician Worklist** tile.
2. Select the **Incidents** tab to view incidents in *Reported* status where you are the assigned technician.
3. Optionally, select a subtab to further filter the list of incoming incidents:
   - Click the **Overdue** tab to display incidents with a due date before the current date.
   - Click the **Priority** tab to display incidents with a priority setting of *Yes.*

   To return from a subtab to the main **Incoming Incidents** tab, click the **Back to Incoming Incidents** icon next to the Search icon.
4. Click the **Actions** icon for an incident.

   A drop-down list of actions appears.

Accessing Incident Actions from the Incidents Page

To access the **Actions** menu for an incident from the Incidents list page:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Code Enforcement Incidents** tile.
2. On the **Incidents** list page, click the **Actions** icon for an incident row.

   A drop-down list of available actions appears.

Accessing Incident Actions from the Incidents Overview Page

To access the **Actions** menu for an incident from the Incidents overview page:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Code Enforcement Incidents** tile.
2. Click an incident row.

   Alternately, click the **View Details** from the actions menu.
3. On the incident **Overview** page, in the header section, whenever more than two actions are available, the primary action is displayed as a button and the rest are available in the 3-dot action menu.

   When only one or two actions are available, they are displayed as buttons.

Scheduling an Inspection When Autoassignment is Active

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

To schedule an inspection when autoassignment is active:

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

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

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

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

Scheduling an Inspection Manually

To schedule an inspection manually for an incident in the reported status:

1. Access the **Actions** menu, and select **Schedule Inspection**.

   The Schedule inspection drawer opens. The top of the drawer displays the incident ID. The incident subtype and address of the reported incident are also displayed, when available.
2. Select an inspector from the list in the **Assign Code Officer** section.

   The list displays the names of inspectors available on the inspection date. It also displays the assigned district type and district of the inspector.

   The inspection count for an officer indicates how many inspections that person is already scheduled to perform on the specified date.

   If no inspectors are available, change the inspection date.
3. Review the following fields:

Page Element	Description
Priority	Use the switch to indicate if the inspection should be considered on a priority.
Due Date	Displays the date by which the inspection should be completed. The inspection due date is determined by the time-based rules for the associated issue subtype. These rules are based on the incident submission date and whether the incident is marked as a priority.
Inspection Date	Accept the default inspection date, or enter a new one. The default inspection date is normally the inspection due date. However, if you are scheduling the inspection manually because autoassignment couldn't find an eligible officer before the due date, the default date is the next date that an officer is available without being overbooked.
Search	From the Assign Code Officer section, use the search field to search and assign a code officer for the inspection, or select an officer from the list below.

Page Element	Description
Sort By	Sort the list by name, district type or district.
All, **Related** tabs	Use these tabs to filter the list to view all code officers or only those who are assigned to the same district or district type as the current incident.

4. Click **Schedule** to schedule the inspection on the selected date with the selected inspector.

   The inspection is scheduled, and the incident status changes to **Inspection**.

   After you schedule an inspection, the incident no longer appears on the **Incidents** tab of the code technician worklist. You can still access the incident from the incident list and incident details pages. See *Working with Incident Details*.

Checking for Duplicates and Marking an Incident as a Duplicate

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

1. Access the **Actions** menu for an incident.
2. Select **Mark as Duplicate** from the menu.

   The **Mark as Duplicate** drawer opens.

   The top of the drawer displays the incident ID, issue subtype, and address for the incident that you are marking as a duplicate.
3. Use the **Incidents** or **Cases** tabs to view initial lists of possible duplicates.

   The search that is performed when you open the page shows active incidents and cases that match the issue subtype and location of the selected incident. Cases and incidents appear in separate lists that appear when you click the corresponding tabs.

   The search results show the case or incident ID, issue type or subtype, address, and its status.
4. Optionally, enter your own search criteria and click **Search** to look for other cases or incidents that the selected incident duplicates.
5. Click the incident or case row that the selected incident duplicates.
6. Click **Mark as Duplicate**.

   The original incident status changes to **Closed**.

   On the incident Overview page, a **Closure details** section is displayed with the date on which the incident was closed, the reason for closure as *Duplicate* and the ID of the related issue (incident or case) which is active.

   Click the related issue (incident or case) ID link to access the detail page of the active incident or case.

   After you mark an incident as a duplicate, it no longer appears on the **Incidents** tab of the code technician worklist. You can still access the incident from the incident list and incident details pages. See *Working with Incident Details*.

Reassigning an Incident to Another Technician

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

To reassign an incident to another technician:

1. Access the **Actions** menu for an incident.
2. Select **Reassign Code Technician** from the menu.

   The **Reassign code technician** drawer opens.
3. Review the list of technicians:

Page Element	Description
View History	Click to view a pop-up list of all code technicians previously assigned to the incident. The pop up lists the name of the code technician, and the date and time of the assignment.
Sort By	Sort the list of the code technicians based on name or the count of open incidents currently assigned to each.
Related	Click to view a list of all code technicians who are assigned the same district as the incident to be reassigned.
All	Click to view a list of all available code technicians irrespective of the district.

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

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

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

Releasing an Incident

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

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

To release an incident from the incident details page:

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

The **Technician Assigned** field is immediately cleared, and the change is saved. The **Claim** button becomes available again.

Rerouting an Incident

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

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

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

When the new incident is created:

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

  This includes the location, the description, whether the issue is a public safety risk, and the name and contact information (if any) from the original incident.
- Data in the original incident's custom fields are not copied.
- You can review and edit the new incident information before submitting it.

  Use this option to add information in any custom fields for the new incident subtype.
- The agency user who reroutes the incident becomes the creator of the new incident.

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

To reroute an incident:

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

   The **Select an Issue Type** window opens.
3. Select the correct **Issue Type**.
4. In the **Reroute Incident** page, review the information for the new incident.
5. If you need to add or change information for the new incident, click **Update** on the **Reroute Incident** page to make the fields editable.
6. Click **Submit**.

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

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

Closing an Incident Manually

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

To close an incident:

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

   The **Close Incident** drawer opens.
3. From the **Close Reason** drop-down list, select one of the following reasons:

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

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

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

   To add new comments:

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

      Alternatively, insert a copy of an existing comment from the *Recent*, *Standard* or *Favorite* tabs, in the **Select Comments** section. For more information about working with comments, see *Working with Comments*.

      After entering a comment, even if you choose to cancel the Close Incident action, the newly entered comment remains saved in the Comments page for the incident. To modify or delete it, go to the Comments page, click the comment to open the **Comments details** drawer.
5. Click **Save**.

   The incident status changes to **Closed**.

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

Reopening a Closed Incident

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

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

For details, see the section *Updating Status of a Case*, in the topic *Reviewing and Claiming Cases*.

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

To reopen an incident:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Incidents** tile.
2. On the Incidents page, on the Search field enter *closed*, to find the closed incident you want to reopen.
3. Click the incident row to access the Incident Overview page.
4. Click the **Reopen Incident** button.
5. In the Reopen Incident drawer, select the reason for reopening the incident from the drop-down menu. The options available are *Closed in error* and *Referred back*.
6. Click **Add Comment** to enter a comment.
7. Click **Save**.

Working with Incident Details

The Incident page includes sections for the incident overview, details, property information, attachments, communication, comments, workflow and history. Use this page to view and update incident information, to claim or assign the incident, and to perform the actions for processing the incident.

Accessing Incident Details

To access incident details from the Incidents list:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Incidents** tile.
2. On the Incidents list page, locate the incident and click the row.

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

Using the Incident Overview Tab

The Overview tab on the Incident page displays summary information and enables you to update assignments.

To use the Overview tab:

1. Access the incident.

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

2. Review the incident **Status** and, if the incident is closed, review the **Reason** in the Closure details section.

   The following table describes incidents statuses and reasons:

Status	Description
Reported	This incident has not been processed. The status does not indicate whether the incident has been claimed. On this page, a code technician sees a **Claim** button, if no technician is assigned to the incident yet. For code officers, the **Assign Code Officer** and **Assign Code Technician** buttons are available if the incident is not yet assigned.
Inspection	An inspection has been scheduled, and the inspection results have not yet been recorded.
Violation	The inspection resulted in a violation. When this happens, a case is created. The incident becomes read-only. When the case is closed, the incident status also changes to *Closed.*
Closed	When in incident is closed, the **Reason** provides additional information: ◦ *Compliance:* No violation exists, or the violation has been corrected and the related case has been closed. ◦ *Duplicate:* The incident was closed as a duplicate of another incident or of a case. ◦ *Error:* The incident was created in error, or its related case was closed with a status of *Void.* ◦ *Referral:* The incident (or it's related case) was referred to another department or agency. Technicians who are assigned to incidents can use the **Close** action manually close the incident with any of these reasons except *Duplicate.* To close a case as a duplicate, the technician uses the **Mark as Duplicate** action.

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

   These fields are visible when relevant:

Page Element	Description
Case	If the incident was determined to be a violation, this field displays the ID of the case that was created. The ID is a link to the case.
Identical Transactions	If any incidents were closed as a duplicate of the current incident, this field displays the number of such identical transactions. The count is a link which opens an **Identical transactions** drawer that lists the duplicate incidents that were closed.
Referral Type and **Referral Code**	If the incident was closed as a referral, these fields appear.

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

4. Review the following general information for the incident:

Page Element	Description
Priority	Displays *Normal* or *High* to indicate whether the incident is a priority issue. The initial value corresponds to the how the person who reported the incident answered the question **Does this issue pose a health hazard or public safety risk?** If the incident has been claimed and it is in the *Reported* status, the assigned technician can use the 3-dot action menu to change the incident priority.
Issue Description	Displays a description of the problem that was reported. If the incident has been claimed and it is in the *Reported* status, the assigned technician can use the 3-dot action menu to change the issue description. Even if the technician edits the description, the original issue description still appears on the **Incident Details** tab.
Service Request ID	Displays the identifier of the service request in the external application. This field appears only if the incident is submitted from an external system.
Service Request Source	Displays the name of the external system from which the incident was submitted. This field appears only if the incident is submitted from an external system.
Reported On	Displays the date that the incident was originally submitted.

Page Element	Description
Review Due Date	Displays the due date for code technician to process the incident. Claiming an incident is not sufficient: the technician must close the incident or schedule an inspection. (The inspection does not have to be performed by the review due date—it has its own due date.) The review due date is calculated based on the issue subtype, the date the incident was reported, and the incident priority.

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

Page Element	Description
District Type	Identifies the code enforcement district type for the incident. For example, incidents might be associated with a fire prevention district type. The district type is inherited from the issue subtype and is read-only. However, if the field is blank because the issue subtype doesn't have a district type, you can manually select one. Use the **Update District Info** from the 3-dot Actions menu. The field becomes read-only after you enter a value.
District	Confirm the specific district where the incident is located. To update use the **Update District Info** from the Actions menu. This district is based on the district type and the issue location: ◦ With GIS integration, the system finds the district using the GIS map layer that is associated with the district type. ◦ If the agency doesn't use GIS integration, the system looks for the code enforcement district that is associated with the parcel. ◦ If the system is unable to determine the district, you can manually enter one. The district determines the default code officers for the incident. For example, if an incident is in fire prevention district 2, then the code officers who are assigned to that district are listed when you schedule an inspection. Code officers are assigned to specific districts using the *Code Enforcement Districts* attribute of the *Code Enforcement Officer* job function. For more information about setting job function attributes, see *Setting Up Agency Staff*.

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

Page Element	Description
Inspection	Click the inspection ID link to open the Inspection Detail page and view the details of the inspection.
Count	Displays the count of the inspection. Values include,

Page Element	Description
	Initial Inspection, *Second Inspection* and *Final Inspection*.
Status	Displays the status of the inspection. Values include *Scheduled*, *Canceled* and *Completed*.
Assigned To	Displays the name of the code officer who is assigned to the inspection.
Scheduled Date	Displays the date scheduled for the inspection.
Inspection Due By	Displays the due date for the inspection.
Inspection Completion Date	Displays the date on which the inspection was completed.
Outcome	Displays the outcome of the completed inspection.

7. Use the 3-dot actions menu on an inspection row to perform any of the following actions:

Action	Description
View Details	View the details of the inspection.
Reschedule	Reschedule the inspection for the incident.
Cancel	Cancel the inspection.

8. When the incident is closed, view the Closure details section.

Page Element	Description
Closed Date	The date on which the incident was closed.
Closed Reason	Displays the reason for the closure of the incident. Values can be *Compliance* or *Error*.
Related Incident	When an incident was closed with the reason *Duplicate*, this field is displayed. It links to the details page of the active incident or case.

Page Element	Description
Referral Type, **Referral Code**	When an incident was closed with the reason *Referral*, these fields are displayed to indicate the referral type and code entered when the incident was closed.

Using the Incident Details Tab

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

> **Note:** The **Incident Details** tab displays the originally reported information, and hence the values displayed here do not get updated even when the agency staff updates the corresponding fields on the Overview tab.

To use the Incident Details tab:

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

Page Element	Description
Address	Displays the original location of the incident. This is the address as entered in the questionnaire under the **Provide the Location of the Issue** section, when the incident was first reported.
Additional Location Details	Displays any additional location information that was provided. This field appears only if there is any detail to show.
Issue Description	Displays the original description of the problem that was reported. This is the issue description as entered in the questionnaire under the **Tell Us What's Going On** section, when the incident was first reported.
Reported Date	Displays the date on which the incident was first reported. This is different from the incident creation date, which is the date on which the incident was first created or entered in the system. An incident reported date can be earlier than the incident creation date. In situations where there is a delay in incident creation, agency users can select a past date to accurately capture the date on which the incident was first reported. See *Setting Up Backdating for Cases and Incidents*.
Does this issue pose a health hazard or public safety risk?	Displays *Yes* or *No* to indicate whether the issue was marked as a health hazard or public safety risk when it was originally reported. This value is also the initial value for the incident priority shown on the Overview tab.

Page Element	Description
<User-defined fields>	Displays any user-defined fields from the intake form.
Name, **Email**, and **Phone**	Displays contact information for the person who reported the incident. If your agency allows public users to hide their information when reporting an issue, these fields can be blank.

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

Using the Property Information Tab

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

1. Access the incident.
2. Select the **Property Information** tab in the left panel to open the detail view of the property associated with the incident.

Page Element	Description
Incident Address, **Additional Location Details**	View the address of the property associated with the incident. If the incident address exists in the system, click the link to access the parcel details page to view more information. This address can be updated by the agency staff .
Address Condition	Indicates if the address associated with the incident has a condition applied to it.
Parcel	View the parcel ID of the property associated with the incident. If the parcel ID exists in the system, click the link to access the parcel details page to view more information. **Note:** A condition icon is displayed near the Parcel ID if a parcel associated with an incident has a condition applied to it. Click the icon to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.
Owner	View the name of the owner of the property associated with the incident.
Parcel Condition	Indicates if the parcel associated with the incident has a condition applied to it.
District Type	Identifies the code enforcement district type for the case. For example, cases might be associated with a fire prevention district type.

Page Element	Description
	The district type is inherited from the issue subtype. If the field is blank because the issue subtype doesn't have a district type, you can manually select one. The field becomes read-only after you enter a value.
District	Confirm or update the specific district where the case is located. This district is based on the district type and the issue location: ◦ With GIS integration, the system finds the district using the GIS map layer that is associated with the district type. ◦ If the agency doesn't use GIS integration, the system looks for the code enforcement district that is associated with the parcel. ◦ If the system is unable to determine the district, you can manually enter one. The district determines the default code officers for the case. Code officers are assigned to specific districts using the Code Enforcement Districts attribute of the Code Enforcement Officer job function.
Edit Incident Address	Click the button to edit the incident address. Only agency users with the required access rights can also see this button.
Select from Parcel	Use this button to select a parcel to associate with the incident. When an incident is created, the address can be added from the map, selected from parcel IDs in the system (using the **Select Parcel** button) or manually added by the agency staff. This button allows agency staff to select a different parcel to be associated with the incident.
3-dot action menu	Use the **Select from Map** option to select a different location from the map. Use the **Edit District Information** to make changes to the district-related information associated with the incident. **Update Property Information** to make changes to the property information associated with the incident.
Reported Address and **Additional Location Details**	View the address and additional location details from where the incident was reported. These cannot be modified.

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

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

Viewing Incident Attachments

The **Attachments** tab lists the file attachments that were uploaded as part of the original incident report (that is, the intake process) or during the incident process.

> **Note:** Agency staff can add attachments to an incident even when it is in the *Closed* status.

To view incident and intake attachments:

1. Access the incident.
2. Click **Attachments** in the left panel.
3. Select either the Incident or Intake tab, and then review information for the attachments in the list:

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

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

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

   To download two or more attachments, select the attachment row check boxes and use the **Download** button at the top of the grid.
6. To remove the attachment from the incident, click the **Actions** icon for the row and select **Delete** from the menu.

   To delete two or more attachments, select the attachment row check boxes and use the **Delete** button at the top of the grid.

Working with Incident Communication

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

Working With Incident Comments

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

Using the Workflow Tab

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

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

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

To manage an incident workflow task:

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

   The Workflow page appears on the right side of the page.
4. By default, the stage view is displayed. Click the **Milestone View** icon to toggle the view.

Page Element	Description
Stage View and **Milestone View** icons	Use these buttons to toggle between the stage and milestone views.
Stages	Click the stage buttons at the top of the Workflow page to open the tasks associated with it in the task panels below. The names of these stages and their labels are displayed as configured in the OCI Process Automation workflow process definitions that are defined by the agency. The stages are represented in different colors to show their status: ◦ Blue: Active ◦ Green: Completed ◦ Gray: Not active or Terminated You can click the buttons in the active and completed stages to view their details in the Task Details panel. Examples of stages that appear in an incident's workflow include *Reported*, *Inspection*, *Violation*, and *Closed*.

Page Element	Description
Milestones	Displays the milestone tasks and the date on which they were completed for the selected incident. Examples of milestone tasks that appear in an incident's workflow include *Start*, *Incident Reported*, *Inspection Scheduled*, *Today*, and *Closed*.
Terminate Workflow	Click this button to stop or terminate a workflow. Once a workflow has started, the Terminate Workflow button allows an agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff. **Note:** You can't activate a terminated workflow.

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

Panel	Description
Task summary cards on the left.	The left panel lists completed and in progress tasks. Each task appears on a card that lists the following information: ◦ Task name ◦ Task status Although completed tasks can have a variety of statuses based on the outcome of the task, the status of an in progress task is always *In Progress*. If the workflow process definition uses parallel gateways, you might see multiple in-progress tasks. ◦ Assignee Tasks can be assigned to an individual, or they can be assigned to a group whose members can claim the task. ◦ Either the due date (for in progress tasks), or the last-updated date, which is the completion date for past tasks.
Task details on the right.	The right panel displays more details for the task that is selected in the left panel. If the task is in progress, use the right panel to change the task assignment, update the status and priority, or add task comments. Completed tasks can't be updated, but you can add comments to them. The Incident Workflow page has an option to include a form or a checklist in the Task Details panel. This form is customizable by the agency to cater to their specific requirements.

Panel	Description

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

For details on using comments and attachments in workflow tasks, see the topic *Using Workflow in Code Enforcement*.

Viewing Status History of the Incident

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

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

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

Using Workflow in Code Enforcement

This topic describes how to manage the workflow in code enforcement. For general information on workflow, see *Using Workflow*.

Managing Workflow Tasks in Code Enforcement

For Code Enforcement – Incident and Case, the Workflow pages can be toggled between a Stage view and a Milestone view.

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

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

Workflow Task Assignment Changes with Reassignments

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

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

Using the Stage View or Milestone View in Code Enforcement

The Code Enforcement – Incident and Case Workflow pages display cards at the top of the page with a Task panel. With Code Enforcement, the underlying process definition differs from the type used for permits or planning applications. A process definition used for Code Enforcement is a *dynamic* process definition based on stages and milestones.

You can toggle between a stage view and milestone view. In the stage view, the agency staff gets a quick indication of the number of stages in the workflow as cards at the top of the page. You can click a stage to view details in the task panel below.

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

To access Incident or Case Workflow page in the stage view:

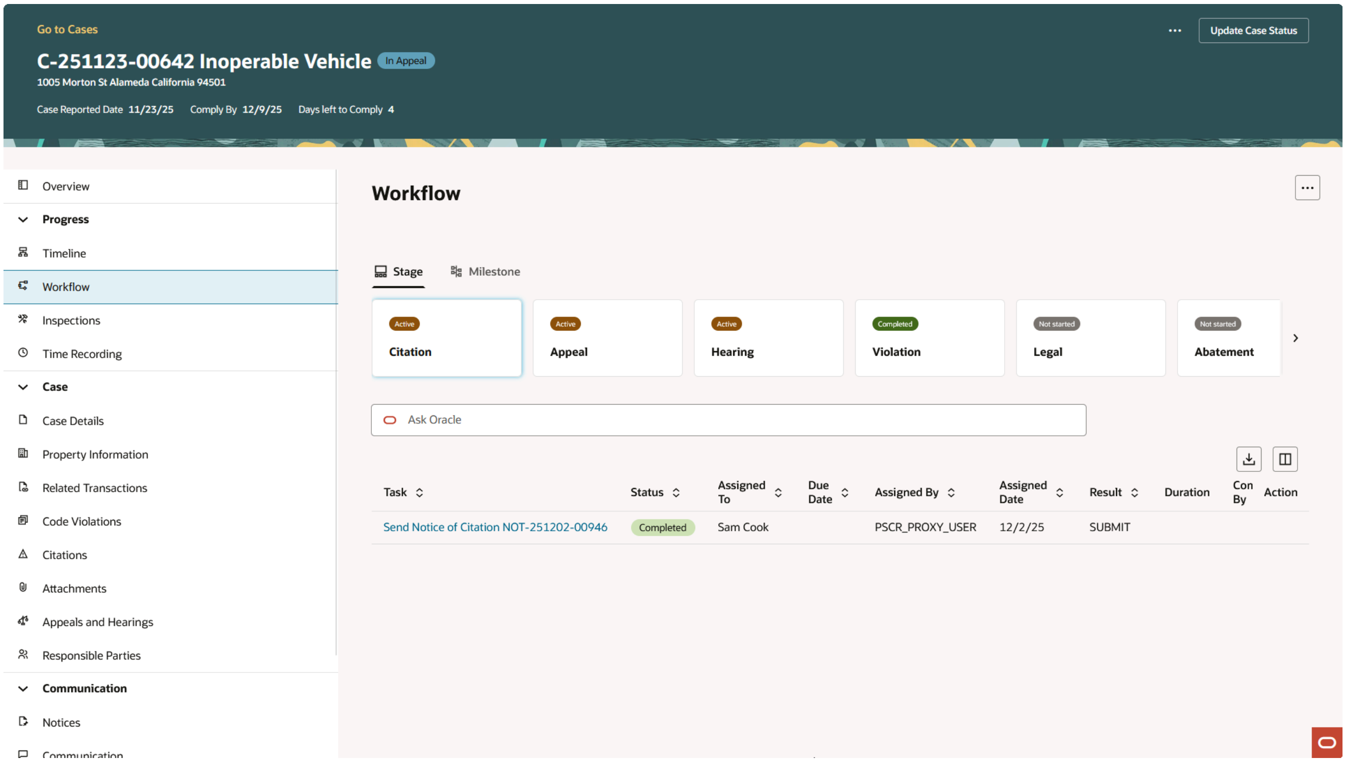
1. From the Fusion Applications Permitting and Licensing homepage, click the **Incidents** or **Cases** tile.

   You can also select the **Incidents** or **Cases** tile on the agency springboard.
2. Click the row for the incident you want to view. Or, from the Actions menu, click the **View Details** button for the case you want to view.

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

   By default, the Workflow page for Code Enforcement displays the stage view as shown below.

   This example illustrates the Code Enforcement – Case Workflow page in the stage view.


Go to Cases
Update Case Status
C-251123-00642 Inoperable Vehicle
In Appeal
1005 Morton St Alameda California 94501
Case Reported Date 11/23/25
Comply By 12/9/25
Days left to Comply 4
Overview
Progress
Timeline
Workflow
Inspections
Time Recording
Case
Case Details
Property Information
Related Transactions
Code Violations
Citations
Attachments
Appeals and Hearings
Responsible Parties
Communication
Notices
Workflow
Stage
Milestone
Active
Citation
Active
Appeal
Active
Hearing
Completed
Violation
Not started
Legal
Not started
Abatement
Ask Oracle
Task
Status
Assigned To
Due Date
Assigned By
Assigned Date
Result
Duration
Con By
Action
Send Notice of Citation NOT-251202-00946
Completed
Sam Cook
PSCR_PROXY_USER
12/2/25
SUBMIT

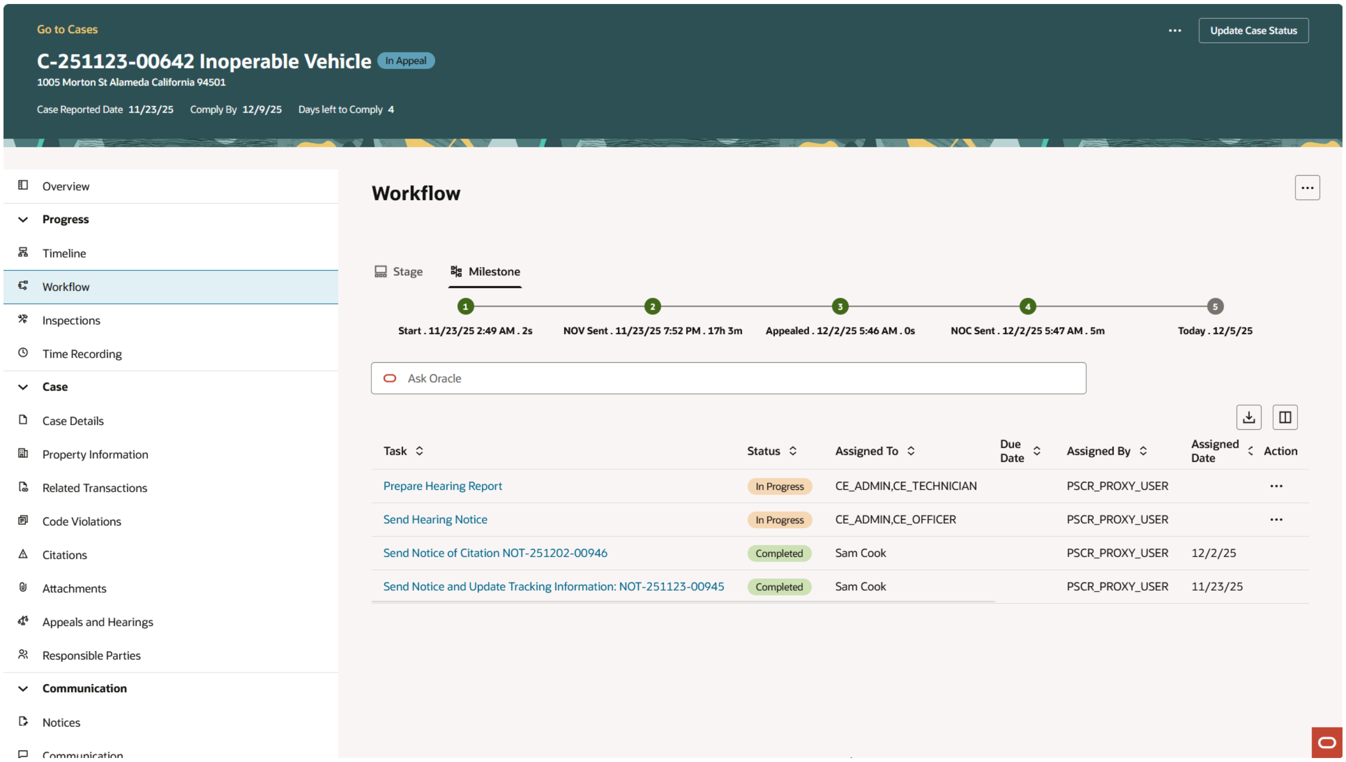
Page Element	Description
Stage View and **Milestone View** icons	Use these buttons to toggle between the stage and milestone views.
Stages	Click the stage cards at the top of the Workflow page to open the tasks associated with it in the task panels below. The names of these stages and their labels are displayed as configured in the OCI Process Automation workflow process definitions that are defined by the agency. The stages display different badges to show their status: • Active • Completed • Not Started • Terminated You can click the active and completed stages to view their details in the Task panel below. Examples of stages that appear in an incident's workflow include *Reported*, *Inspection*, *Violation*, *Legal*, and *Closed*.
Task Panel	The Task panel displays the tasks associated with the selected stage. Click a task row to open and view all information related to that task in the details drawer.
Action button on the Workflow page	Click the three-dot action menu on the workflow page to: • View Process Information • Terminate Workflow
View Process Information	Click this action menu item to view details about the process information.
Terminate Workflow	Click this action menu item to stop or terminate a workflow. Once a workflow has started, the **Terminate Workflow** option allows agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff. **Note:** You can't activate a terminated workflow.

To access the Incident or Case Workflow page in the milestone view:

1. Select the **Incidents** or **Cases** tile on the agency springboard.
2. Click the row for the incident or case you want to view.
3. Use the navigation links in the left frame to select **Workflow**.

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

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


Go to Cases
Update Case Status
C-251123-00642 Inoperable Vehicle
In Appeal
1005 Morton St Alameda California 94501
Case Reported Date 11/23/25
Comply By 12/9/25
Days left to Comply 4
Overview
Progress
Timeline
Workflow
Inspections
Time Recording
Case
Case Details
Property Information
Related Transactions
Code Violations
Citations
Attachments
Appeals and Hearings
Responsible Parties
Communication
Notices
Workflow
Stage
Milestone
Start . 11/23/25 2:49 AM . 2s
NOV Sent . 11/23/25 7:52 PM . 17h 3m
Appealed . 12/2/25 5:46 AM . 0s
NOC Sent . 12/2/25 5:47 AM . 5m
Today . 12/5/25
Ask Oracle
Task
Status
Assigned To
Due Date
Assigned By
Assigned Date
Action
Prepare Hearing Report
In Progress
CE_ADMIN,CE_TECHNICIAN
PSCR_PROXY_USER
Send Hearing Notice
In Progress
CE_ADMIN,CE_OFFICER
PSCR_PROXY_USER
Send Notice of Citation NOT-251202-00946
Completed
Sam Cook
PSCR_PROXY_USER
12/2/25
Send Notice and Update Tracking Information: NOT-251123-00945
Completed
Sam Cook
PSCR_PROXY_USER
11/23/25

Page Element	Description
Stage View and **Milestone View** icons	Use these cards to toggle between the stage and milestone views.
Milestones	Displays the milestone tasks and the date on which they were completed for the selected incident. Examples of milestone tasks that appear in an incident's workflow include *Start*, *Incident Reported*, *Inspection Schedule* , and *Closed* .
Task Panel	The Task panel displays the tasks associated with the selected stage. Click a task row to open and view all information related to that task in the details drawer.
Action button on the Workflow page	Click the three-dot action menu on the workflow page to: • View Process Information • Terminate Workflow
View Process Information	Click this action menu item to view details about the process information.
Terminate Workflow	Click this action menu item to stop or terminate a workflow. Once a workflow had started, the **Terminate Workflow** button allows an agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff. **Note:** You can't make a terminated workflow active again.

Working with the Code Enforcement Task Details

You can view the details of the code enforcement case or incident workflow tasks in the details drawer.

1. Select the workflow stage in either stage or milestone view, and from the Tasks lists below, click a task row to open the task details drawer.
2. View the elements of the task details drawer:

Page Element	Description
Task ID	Displays the unique identification number for the task.
Reassign	Click the **Reassign** button to reassign the incident or case to a different code technician or code officer.
Claim	Click the **Claim** button to claim an incident or case.
Task details	Displays the options to add a result for the task and set the priority of the task.
Result	View or select the result for the task.

Page Element	Description
Priority	View or set the priority of the task. The options include: *Low*, *Medium*, and *High*.
Documents Checklist	Lists the documents that can be added for the task. Select the checkbox next to the required document.
Comments	View or add comments for the task. To know more about comments, see *Working with Comments*.
Attachments	View or add attachments for the task. To know more about managing attachments, see *Working with Code Enforcement Attachments*.
Form	Use the form to check or enter information as specified by the agency. Code Enforcement – Incident and Case Workflow details drawer has an option to include a form or a checklist. This form is customizable by the agency to cater to their specific requirement.

Using a Form in Code Enforcement – Incident and Case Workflow Pages

Code Enforcement – Incident and Case Workflow pages have an option to include a form or a checklist in the Task Details drawer. The agency can customize the form for their specific requirement.

An example of an incident task having a form can have the following checkpoints for the agency staff:

- Check if Repeat Offender
- Send Courtesy Notice

An example of an abatement task having a form can have the following checkpoints for the agency staff:

- Schedule Inspection Post Abatement
- Add Fee
- Send Notice

Working with Incident Communications

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

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

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

Sending Incident Communication

1. From the Fusion Applications Permitting and Licensing homepage, click the **Code Enforcement Incidents** tile.

   Alternatively, you can click the **Agency Springboard** tile, and then click the **Incidents** tile to view all the incidents in the system.
2. Select an incident on the Incidents list page.
3. Click Communication in the left navigation bar.
4. On the Communication page, click **Add**.
5. On the **New ad hoc message** page, enter values for the following fields:

Page Elements	Definition
Channel Type	Specify what type of ad hoc message you want to send. Values are: ◦ *Email:* Generates an email that is sent to users. ◦ *Emails and Notifications:* Generates both an email and a notification with the same message. ◦ *Notification:* Generates a notification that appears when users click the notification icon in the application. ◦ *Text:* Generates a short message service (SMS) text message that is sent to users. **Note:** The fields that are available to define on this page vary depending on the channel type that you select.
Visibility	Select which type of user can see this message. Values are: ◦ *Applicant and contacts* ◦ *Agency staff only* ◦ *Applicant*
Display Format	Select the format of the message. Values are: ◦ *HTML* ◦ *Text* **Note:** This field does not appear for the *Text* channel type.
Create Web Form	Click to access the **Web Form** drawer where you create a questionnaire that you can insert into your message.

<table>
<tr><th>Page Elements</th><th>Definition</th></tr>
<tr><td></td><td>Click the Insert Web Form button in the drawer to insert the web form questions into the body of your message along with a link that the recipient can use to access and respond to the questionnaire.</td></tr>
<tr><td>To</td><td>Click the + button to view the Insert into the To field drawer from which you can search for and select recipients. The display shows the options and the count of values available, which are determined by the transaction you are working with and the channel type you selected in the Message Attributes section.

For example, when you select a value here for the email channel type, the email ID is inserted into the field. You can delete the ID using the X icon, but you cannot edit it.

Enter the email address, user ID, or phone number of the person or organization to whom you want to send the message.

Note:
Enter email addresses for emails, user IDs for notifications, and phone numbers for texts.</td></tr>
<tr><td>Cc and Bcc</td><td>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.

Note:
These fields appear only for the Email and Emails and Notifications channel types.</td></tr>
<tr><td>From</td><td>Enter or click + and select the email address, user ID, or phone number of the person or organization who is sending the generated message.

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.

Note:
Enter email addresses for the Email and Emails and Notifications channel types, user IDs for the Alert, Emails and Notifications, and Notification channel types, and phone numbers for the Text channel type.</td></tr>
<tr><td>Subject</td><td>Enter a brief description of the purpose and content of the message or click + to select attributes to include.</td></tr>
</table>

Page Elements	Definition
	Note: This field does not appear for the *Text* channel type.
Message Body	Enter the main body text of the message. For the *Text* channel type and emails and notifications with the *Text* display format, you can enter only plain, unformatted text. For the *HTML* display format, you can enter rich text, links, and images.

6. Click **Send**.

Communicating Using a Web Form

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

Here's how to create a web form:

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

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

5. 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.
6. Click **Insert Web Form** to save your web form questionnaire and return to the Ad Hoc Message page.

7. Click **Insert in Message Body** to insert the available transaction attributes into the body of your message.
8. Click **Insert**.
9. 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 Incident Communications

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

1. On the **Communication** page, you can view the message reference ID, date and time the message was sent, message subject, channel type, and status, such as *Sent*.
2. For each row on the Communication page, click the **Actions** icon to resend, forward, or view details of the message.

   - Select the **Resend** action to access the message in the Message details page in the 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 page. Enter the new recipient email addresses, update the message, if necessary, and click **Forward** to send the updated message to the new recipients.
   - Click the **View More Details** button to access the message in the Message details page and view detailed information about the message.

8 Managing Inspections

Security Details for Managing Inspections

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

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

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

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

Reviewing Code Enforcement Inspection Details

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

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

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

Reviewing the Inspection Details

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

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

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

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

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

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

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

You can take the following actions related to your inspection:

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

Resulting Inspections

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

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

For details about statuses and result options available for an incident and for case, see *Submitting Code Enforcement Inspection Results*.

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

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

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

Compliance Date Calculations based on Inspection Result

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

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

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

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

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

For details on configuring policy occurrence count and UOM, see *Setting Up Time Rules*.

Sections on the Result Inspection page

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

Element	Description
Completion Date	Enter the date when you are completing the inspection. Shows the current date by default.
Create a violation notice switch	Turn on the switch to create notice of violation when you submit. This option is available for **Remains in Violation** result.
Description	Enter a description.
Case Complied On Date	Enter the date on which the case confirmed compliance. This option is available only when you select the **In Compliance** result.
Existing Case Comply by Date	Displays the existing date by which the case must confirm compliance.
New Case Comply by Date	Displays the new date by which the case must confirm compliance. You can enter a new date.
Reinspection Scheduled For	Displays the reinspection schedule date. You can enter a new date.
Inspection Due Date	Displays the inspection due date.

Element	Description
Use the same comply by date for all open violations checkbox	This checkbox is selected by default. If you don't want to apply the new comply by date for all open violations related to the case, deselect this checkbox. The earliest and latest violation comply by dates are displayed to help you set the new case comply by date or the next inspection scheduled date.
Comments	Add any comments related to the current inspection.
Attachments	Add any attachments related to the current inspection.
Submit	Click to submit the inspection result.

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

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

Reviewing the Attachments

The Inspection Attachments tab allows you to view and add attachments related to the inspection. For details about attachments, see *Working with Code Enforcement Attachments*.

Reviewing the Comments

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

Reviewing the Code Violations

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

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

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

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

Reviewing the Notices

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

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

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

- *Generate*: Click to generate the ad hoc notice and open the report in a separate page of your browser. The status of the notice changes to Generated.

  > **Note:** In the Oracle Municipal Code Officer app, system generated notices are automatically added and ad hoc notices can be added by code officers. Notices can be printed by code officers through the Oracle Municipal Code Officer app, using the **Print** option. However, these notices cannot be reviewed or edited before printing. See *Working with Code Enforcement Inspection Details*.

- *Cancel*: Click to cancel the notice. This option is available until the notice is generated. The status of the notice changes to Canceled.
- *Print*: Click to print the notice report, which opens in a separate page of your browser. This option is available only for generated notices.

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

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

9 Using the Code Officer Application

Security Details for Using the Code Officer Application

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

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

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

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

Installing and Configuring Oracle Municipal Code Officer

Use the Code Officer Application to perform and report on code enforcement inspections. Code officers can review inspection tasks, view inspection details, add comments and attachments, issue notices when applicable, and submit inspection results.

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

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

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

You can then use this URL to access the Code Officer Application from any device.

In addition, from the browser that you use to access the URL, select the share icon. Choose the **Add to home screen** option to add the Code Officer Application link to your device's home screen. This allows you to access the application by clicking the link rather than reentering the URL.

> **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.

Viewing Code Officer Inspection Tasks

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

On the Inspection Tasks page, code officers can:

- View the inspections list.

  Inspections are listed with status badges for Ready, Completed and Overdue. The information displayed on each inspection row includes: scheduled or due dates, inspection count, location, the code office assigned, a short description for the incident or case details, incident or case identifier. Inspections with the Overdue and Ready badges often display an one-liner about it's status.
- Apply filters and search inspections.

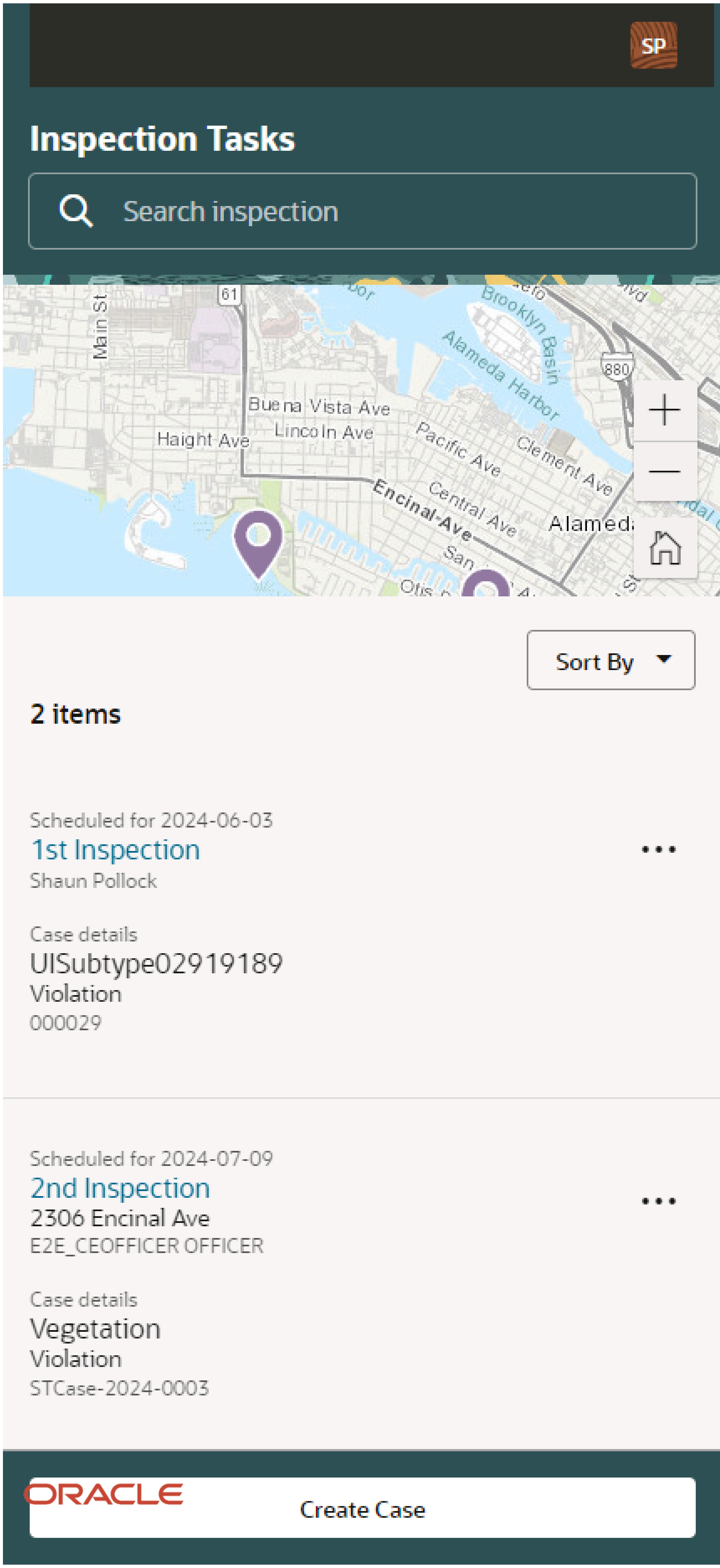
  The first level filters include: code officer, code technician, all scheduled inspections, first inspections, reinspections and completed inspections. You can add one or more of these filters in your search.

  For all the inspections-related filters, you can apply a second level of filters, which include: inspections scheduled for today, tomorrow, or this week, and inspections that are ready and overdue.
- Sort inspections.

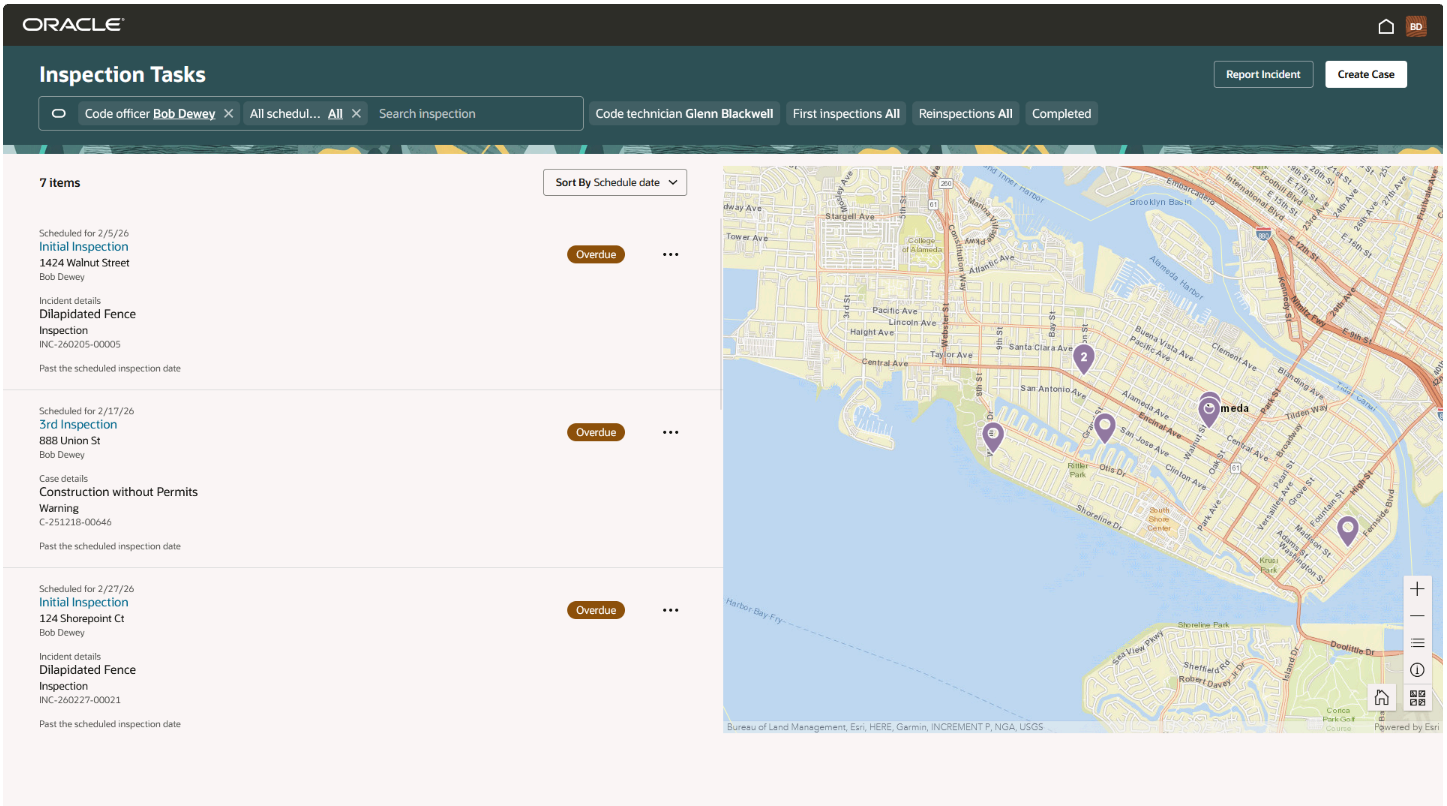
  These are some of the sorting options available: inspection count, case or incident, issue type or subtype, case or incident status, scheduled, due and completed dates, priority, readiness for inspection, and address of the location under inspection.
- View the status of the incident or case.
- View the inspections in the map on the page.
- Report an incident.
- Create a new case.
- Initiate actions from the three-dot action menu to:
  - View details of the inspection.
  - View and add comments and attachments.
  - Reschedule inspection.
  - Cancel inspection.

- Reroute incident when the task status is inspection.

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


SP
Inspection Tasks
Search inspection
Main St
Brooklyn Basin
Alameda Harbor
880
Buena Vista Ave
Lincoln Ave
Haight Ave
Pacific Ave
Clement Ave
Encinal Ave
Central Ave
Alameda
Sort By
2 items
Scheduled for 2024-06-03
1st Inspection
Shaun Pollock
Case details
UISubtype02919189
Violation
000029
Scheduled for 2024-07-09
2nd Inspection
2306 Encinal Ave
E2E_CEOFFICER OFFICER
Case details
Vegetation
Violation
STCase-2024-0003
Create Case

This example illustrates the code officer’s view of the Inspection Tasks page on a desktop computer:


ORACLE
Inspection Tasks
Report Incident
Create Case
Code officer Bob Dewey
All schedul... All
Search inspection
Code technician Glenn Blackwell
First inspections All
Reinspections All
Completed
7 items
Sort By Schedule date
Scheduled for 2/5/26
Initial Inspection
1424 Walnut Street
Bob Dewey
Overdue
Incident details
Dilapidated Fence
Inspection
INC-260205-00005
Past the scheduled inspection date
Scheduled for 2/17/26
3rd Inspection
888 Union St
Bob Dewey
Overdue
Case details
Construction without Permits
Warning
C-251218-00646
Past the scheduled inspection date
Scheduled for 2/27/26
Initial Inspection
124 Shorepoint Ct
Bob Dewey
Overdue
Incident details
Dilapidated Fence
Inspection
INC-260227-00021
Past the scheduled inspection date
Bureau of Land Management, Esri, HERE, Garmin, INCREMENT P, NGA, USGS
Powered by Esri

Using the Map

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

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

Reporting an Incident

Code enforcement officers such as an inspector can directly report incidents from the Inspection Tasks page.

To report a new incident, click the **Report Incident** button at the top of the **Inspection Tasks** page next to the **Create Case** button. For details on the incident intake process, see *Reporting Issues*.

Creating a New Case

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

To create a new case:

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

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

   > **Note:** The availability of the **Create Case** button is determined by your administrator's settings for the **Restrict Direct Case Creation without Incident** feature on the **Agency Information - Agency Features page**:
   >
   > - If this option is turned off, the **Create Case** button is available for all code officers to click and create a new case without a reported incident.
   > - If this option is turned on, the **Create Case** button is available only for code officers with the ADD_STANDALONE_CASE_PRIV privilege.
   >
   > See *Setting Up Agencies*.

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

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

3. Use the map page to locate the property for which you are creating the case and click **Next**.

   In the **Confirm location** drawer, add any apartment and location details. Click the **Confirm** button.

   See the topic *Reporting Issues* for details on the issue reporting process.
4. In the **Attachments** section, you can attach a photo, video, or an audio file as reference.

   In the **Violations** section, click **+** to open the **Add violation** page and include one or more code violations from a list of current or other violations. Each newly added code violation is in the Open status. The value is updated whenever the status is updated in the Code Enforcement Inspection – Code Violations page or the Case Code Violations page. See *Using the Code Officer Worklist* and *Working with Code Violations*.

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

5. Click **Submit**.

Rescheduling an Inspection

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

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

You can also reschedule an inspection from the inspection details page. For more information, see *Working with Code Enforcement Inspection Details*.

Canceling an Inspection

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

1. On the Inspection Tasks page, click the action button on the row of the inspection you want to cancel.

   Alternatively, on the Inspection details page, click the action button.
2. Select **Cancel** or **Cancel Inspection**.
3. Click **Cancel Inspection**, again on the confirmation message.

Rerouting an Incident

Code enforcement officers such as an inspector can reroute an incident during inspection, if the incident is found to belong to a different issue type or subtype.

To reroute an incident:

1. Click the three-dot actions menu from the incident row.
2. Click the **Reroute Incident** action.
3. On the **Select an Issue Type** page, select the correct issue type for the incident.
4. On the **Reroute Incident** page, all information from the incident which is being rerouted gets copied over. The code enforcement officer can review and click the **Update** button to modify the information on this page.
5. Click **Submit**.
6. The original incident is closed with the reason *Rerouted,* and a new incident is created. A confirmation message provides the ID of the new incident.

For details, see the section on "Rerouting an Incident" in *Processing Incidents*.

Working with Code Enforcement Inspection Details

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

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

- Inspection count (as configured by the administrator on the Inspection Count page)
- Inspection identifier
- Status badges for inspections that are *Ready*, *Completed* and *Overdue*
- Three-dot Actions menu
- Result drop-down menu
- Location
- Description
- Inspection scheduled date
- Inspection due date
- Compliance date
- Name of the assigned code officer and code technician
- Case or incident details, such as the issue subtype, case or incident identifier, description and case status badges like, Violation, Compliance, Remains in Violation.
- Request for early inspection switch

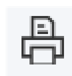
You can swipe left to see the foldouts for Code violations, Comments, Attachments, Time Recording, Notices, Prior Inspections.

Elements on the Inspection Tasks Page

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

Page Element	Description
Inspection identifier, **type**, and **status**	View the inspection identifier or number, its type, and status such as, *Ready*, *Overdue*, and *Completed*.
Inspection details	View the inspection scheduled dates and due dates, the compliance date, the name of the code officer and technician.
Ready for Inspection switch	Turn on if the responsible party has indicated on the **Resolve Issue** page that the case is ready for an early inspection. The status of the inspection will change to *Ready*. For details, see *Resolving Issues*.
Result	Select to list the result options to choose from. Examples include *In Compliance*, *Remains in Violation*, *Issue Citation*, *Mandatory Abatement*. *Extension* among others. The options available are based on the status of the incident. See the **Submitting Inspection Results** section for more details.

Page Element	Description
Foldouts	Foldouts contain additional information about the inspection. To access the foldouts, swipe the screen to the left or use the navigation button at the bottom of the page. The available foldouts include Code violations, Comments, Attachments, Time recording, Notices, and Prior Inspections.
Code violations foldout	View a list of code violations associated with the case. On the **Code violations** page: • Click the code violation identifier hyperlink, to view the **Code violation details** page. This page lists the code violation identifier, the status, summary, description, and corrective actions. You can edit the sections for summary, description and corrective actions. • Click **+** to add a new violation. The **Code violations** page lists the status, the code violation identifier, a brief description and the case compliance date. • Click the **View all violations** link on the **Code violations** page to access the **Violations** page for the inspection, which lists all violations along with action buttons for each. The actions that can be performed for each violation record is based on the status it is in. The actions include: • **Resolve** • **Remove from case** • **Edit Complied On Date**: Available only for resolved violations. • **Edit Comply By Date**: Change the date by when the case must ensure compliance. This change won't alter the inspection schedule date. • **Reopen** **Note:** For resolved violation records with no fee dues, the Action button is not available.
Comments	View a list of comments related to the inspection. On the **Comments** page: • Click the chevron on a row to open the **Comment details** page, to edit or delete a comment. • Click **+** to open the **Add comment** page. You can enter a comment and format it using the **Rich Text Editor** option. You can also search and select an existing comment from the **Recent**, **Standard** or **Favorite** comments lists. • Click the **View all comments** link on the **Comments** page to view a list of all comments related to the inspection, case or incident. Use the **Private** switch, to keep comments private and visible only to the agency staff.
Attachments	View a list of attachments related to the inspection. On the **Attachments** page: • Click the **Action** button to, view details, download, preview or delete the attachment. • Click **+ Add Attachment** to files, documents, or photos. • Click the **View all attachments** link to view a list of all attachments related to the inspection, case or incident.
Notices	View a list of notices related to the inspection:

Page Element	Description
	• System-generated notices that are added automatically after the code officer submits the inspection result. • Ad hoc notices that are added by the code officer on this page or added by the code technician from the inspection page in the desktop system. **Note:** **Notices** section appears only for inspections in the *Completed* status. You can also add a notice even when the case is in the *Closed* status. On the **Notices** page: • Click the notice identifier hyperlink, to view the **Notice Details** drawer. • Click the **+** button, which opens the **Add Ad Hoc Notice** drawer. You can select a notice from the available ad hoc notices. Click **Add Notice** to return to the **Notices** page. • Click the **More Actions** button to, generate or cancel a notice. Click the print icon  to print the notice. Once printed, you can't delete the notice. • Click the **View all notices** to view a list of all system and ad hoc notices with their identifiers and statuses. Use the **Sort By** option to sort notices based on *Notice ID* or *Notice Creation Date*. **Note:** You can't review and edit a notice when you are adding it from the Code Enforcement **Inspection Tasks** page. However, notices generated from the Case Overview page and the Code Technician Worklist can be reviewed and edited before printing. For more information, see *Working with Notices*. Click the **Cancel** icon to cancel the notice and remove it from the list. This option appears until the notice is printed.
Time Recording	On the **Time Recording** page: • Click a time row, to view the **Time Recording details** page. • Click the **+** button, which opens the **New time** page. Select the date and time type code and enter the time in the **Hours** and **Minutes** fields. For more information, see *Adding Time Entries*. • Click the **View all time recordings** to view a list of all time recorded by the code officers and technicians related to the inspection.
Prior Inspections	View a list of all previous inspections with the date of inspection and inspection result.

Submitting Code Enforcement Inspection Results

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

To submit the result of an inspection:

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

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

   For a complete list of all available fields, see "Sections on the Result Inspection page" in *Reviewing Code Enforcement Inspection Details*.
5. Click the three-dot action menu at the upper right, select **Submit**. An information message appears with an issue number for future reference. Clicking **OK** returns you to the Inspection page. To return to the Inspection Tasks page, click the back button.

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

Statuses and Result Options Available for an Incident

Status at the time of inspection	Result of the inspection
Inspection	**In compliance**: The status of the incident changes to Compliance and the inspection is closed.
	Violation: A case is created with a status of Violation and a re-inspection is scheduled, which must be updated by the code enforcement officer. When you update the result as in violation, the incident details page allows you to change the issue type, issue subtype, code violations, address, and issue description. On the incident details page, click the **Update** button: • Search and select the desired issue type and subtype. • Click **Next** to open the Code Violations page and add code violations. • Click **Next** to open the Review page, where you can use the **Edit** icon to make changes to location, issue description, code violations. **Note:** Additionally, you will see any custom fields that were available at the time of creating the incident. After adding the changes, click **Done**. • Click **Submit** to create a case with the newly entered details.
	Referral: The status of the incident changes to Referral and the inspection is closed. The referral body that is configured on the Referral Body page is used for the referral incident.
	Undetermined: The status of the incident changes to Undetermined and a new inspection is automatically scheduled.

Status at the time of inspection	Result of the inspection
	Closed: The inspection and the incident are closed.

Statuses and Result Options Available for a Case

Status at the time of inspection	Result
Violation	**In compliance**: The status of the case changes to Compliance and the inspection is closed.
	Remains in Violation: • The status of the case remains unchanged. The new compliance date is calculated based on the inspection completion date and the time rule set up. See *Setting Up Time Rules*. • A new inspection is scheduled, which can be updated by the code officer. • A notice is created, which must be updated by the code officer before printing it. For time rule calculations related to compliance due dates, see the section **Compliance Date Calculations based on Inspection Result** in the topic *Reviewing Code Enforcement Inspection Details*.
	Issue Citation: • The status of the case changes to Citation and the inspection is closed. • The compliance date is extended. • A notice is created, which must be updated by the code enforcement officer before printing it. • A re-inspection is scheduled, which must be updated by the code enforcement officer.
	Extension: • The status of the case remains unchanged and the inspection is closed. • The compliance date is extended, based on the time rules set up.
	Mandatory Abatement: • The status of the case changes to Mandatory Abatement and the inspection is closed. • The compliance date remains unchanged. • The code technician schedules an inspection.
Appeal	**In Compliance**: The status of the case changes to Compliance and the inspection is closed.
	Extension: • The status of the case remains unchanged. • Any scheduled inspection will remain unchanged, with an option to reschedule it. If no inspection is scheduled, then code officers must manually schedule an inspection. • The compliance date must be manually extended by the code officer.
	Not in Compliance:

Status at the time of inspection	Result
	• The status of the case remains unchanged and the inspection is closed. Code officers must manually schedule an inspection. • The compliance date is extended, based on the time rules set up.
Hearing	**In Compliance**: The status of the case changes to Compliance and the inspection is closed.
	Extension: • The status of the case remains unchanged. • Any scheduled inspection will remain unchanged, with an option to reschedule it. If no inspection is scheduled, then code officers must manually schedule an inspection. • The compliance date must be manually extended by the code officer.
	Not in Compliance: • The status of the case remains unchanged and the inspection is closed. Code officers must manually schedule an inspection. • The compliance date is extended, based on the time rules set up.
Legal	When a case status is Legal, the case is transferred to the legal department. **In Compliance**: The status of the case changes to Compliance and the inspection is closed.
	Extension: • The status of the case remains unchanged. • Any scheduled inspection will remain unchanged, with an option to reschedule it. If no inspection is scheduled, then code officers must manually schedule an inspection. • The compliance date must be manually extended by the code officer.
	Not in Compliance: • The status of the case remains unchanged and the inspection is closed. Code officers must manually schedule an inspection. • The compliance date is extended, based on the time rules set up.
Citation	**In Compliance**: The status of the case changes to Compliance and the inspection is closed.
	Remains in Citation: The status of the case remains unchanged. The new compliance date is calculated based on the inspection completion date and the time rule set up. See *Setting Up Time Rules*. A new inspection is scheduled, which can be updated by the code officer.
	Issue Citation: • The status of the case remains unchanged and the inspection is closed. • The compliance date is extended, based on the time rules set up. • A notice is created, which must be updated by the code enforcement officer before printing it.

Status at the time of inspection	Result
	• A re-inspection is scheduled, which must be updated by the code enforcement officer.
	Mandatory Abatement: • The status of the case changes to Mandatory Abatement and the inspection is closed. • The compliance date remains unchanged. • The code technician schedules an inspection.
	Extension: • The status of the case remains unchanged and the inspection is closed. • The compliance date is extended, based on the time rules set up.
Mandatory Abatement	**Abatement Complete**: The status of the case remains unchanged and the inspection is closed. The code technician should update the case status and schedule an inspection.
	Abatement Incomplete: The status of the case remains unchanged and the inspection is closed. The code technician should update the case status and schedule an inspection.

10 Managing Cases

Security Details for Managing Cases

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

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

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

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

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

Reviewing and Claiming Cases

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

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

- Viewing a case summary on the Code Technician Worklist page and then clicking the **Claim** button.
  The code technician claiming an incident is by default the assigned technician for the case. This option is used for claiming a new case created directly — without a reported incident.
- Using the Cases page Actions menu to directly assign a code technician.
  This option is also useful for reassigning the case to another code technician.

Reviewing and Claiming Cases Using the Code Technician Worklist

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

Page Element	Description
Case	This column displays: ◦ The case ID that is assigned based on the agency's autonumbering rules.

Page Element	Description
	◦ The issue type and subtype, separated by a hyphen.
Creation Date	Displays the date on which the case was created.
Location	Displays the location of the issue.
Issue Description	Displays the description of the case
Case Status	Displays the status of the case, for example, *Compliance*, *Violation*, *Citation*, and so on.
Comply by	Displays the last date to ensure compliance.

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

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

Reviewing Cases on the Cases Page

To review cases on the cases page:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Cases** tile.

   Alternately, from the Agency Springboard select Cases tile, and then select Cases.
2. Use the **Search** field to filter cases. By default, the **Active** filter chip is on to display only the active cases. You can remove the filter chip, enter a search term, such as closed or warning, and click Search. See *Using Search*.
3. If automatic routing or autoassignment is on, choose which cases to view.

   Both code technicians and code officers can review the cases list. They can view all the cases in the system or filter to see only those relevant to their area of responsibility.

Page Element	Description
Relevant Types	Select this button to see only those cases relevant to the user's area of responsibility.
All Types	Select this button to see all cases, regardless of the user's area of responsibility.

4. Review the following summary information about cases:

Page Element	Description
Case ID	The case ID that is assigned based on the agency's autonumbering rules.
Status	The case status.
Issue Type, **Issue Subtype**	The issue type and subtype.
Creation Date	The date on which the case was created.
Comply By	The date by which the violation must be complied by.
Issue Description	A description of the issue.
Address, **City**, **State**, **Postal Code**	Displays the case address with the city, state, and postal code.
District Type, and **District**	Displays the case's district type and district.
Code Technician	Displays the name of the Code Technician, if any, assigned to this case.
Code Officer	Displays the name of the Code Officer, if any, assigned to this case.
Total Payable **Total Due**	Displays the total amount of fees associated with the case that are payable and due.
Actions	Displays the three-dot actions menu. For information about the actions in the menu, see *Processing Incidents*.

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

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

   To return to the case list, click the **Go to Cases** link in the banner.

   For more information about the Case details page, see *Viewing the Case Details Overview*.

Processing Cases

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

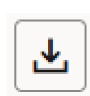
As agency staff, such as a code technician, you can use the Cases page to view a complete list of cases. Go to the list of cases to manage case activity and perform these tasks:

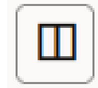
- Create a case
- Update case status
- Assign or reassign technicians and officers to cases
- Access details about case history

Using the Cases Page

1. From the Fusion Applications Permitting and Licensing homepage, click the **Cases** tile.

   Alternately, select the **Cases** tile on the Agency Springboard, and then select Cases, to view all the cases in the system.
2. You can perform these actions to display cases that meet specific criteria:

Page Element	Description
Search	Use the **Search** field to filter incidents. By default, the **Active** filter chip is on to display only the active incidents. You can remove the filter chip, enter a search term, such as closed or reported, and click Search. See *Using Search*.
Select checkboxes	Click the checkboxes for selecting multiple rows before performing the actions **Reassign Code Officer** and **Reassign Code Technician**.
Relevant Districts All Districts	These buttons are available only for the case officers. Toggle between buttons to either view the list of cases from districts relevant to the user or all district types.
Export	Click the download button  to export the case list to a .csv file.

Page Element	Description
Customize Columns	Click the **Customize Columns** button  to view the columns available for the grid. Use the checkboxes to either show or hide the columns.

Managing Case Activity

1. On the Cases page, you can locate the basic information about the case using the following information:

Page Element	Description
Cases checkboxes	Click to select one or more cases using the checkboxes next to case records.
Reassign Code Officer	Select one or more cases and click the button to reassign a code officer.
Reassign Code Technician	Select one or more cases and click the button to reassign a code technician.
Create Case	Click to create a new case. This button is not available in the Code Technician Worklist — Cases page. You must navigate to the Cases page using the **Cases** tile.
Case ID	View the unique identifier of the case.
Status	View the status of the case, for example, *Closed*, *Compliance*, *Violation*, *Void*, *Mandatory Abatement* and *Legal*. For details about the options, see *Viewing the Case Details Overview*.
Issue Type	View the issue type of the case.
Issue Subtype	View the issue subtype of the case.
Creation Date	View the date on which the case was created.
Comply by	View the last date to ensure compliance.
Issue Description	Review the description of the case.

Page Element	Description
Address, **City**, **District Type**, **District**	View the address and location details of the issue.
Code Technician	View the name of the code technician currently assigned to the case.
Code Officer	View the name of the code officer currently assigned to the case.
Total Payable, **Total Due**	View the total fees due and payable associated with the case.
Actions	Click to perform actions: ◦ *View Details* ◦ *Update Status*: Click to open the Update Status page and select a new status from the drop-down menu. Click **Done** after you enter a reason. Depending on the status you select, the workflow stages and their tasks are accordingly updated. The list of transaction statuses along with each of its associated system status are set up by your administrator. See *Setting Up Transaction Statuses*. **Note:** The **Update Status** option is available only if your agency has enabled the **Available to Manually Select as New Status** option on the Transaction Status page. If the option is disabled, the case status changes are triggered only by the code enforcement workflow. ◦ *Assign/Reassign Code Officer*: Click to open a drawer and select the new code officer to assign to the case. ◦ *Assign/Reassign Code Technician*: Click to open a drawer and select the new code technician to assign to the case. Click **Assign** or **Reassign** to apply the changes and return to the Cases page.

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

Accessing Case Actions from the Cases Page

To access the **Actions** menu for a case from the Cases list page:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Code Enforcement Cases** tile.
2. On the **Cases** list page, click the **Actions** icon for a case row.

   A drop-down list of available actions appears.

Accessing Cases Actions from the Cases Overview Page

To access the **Actions** menu for a case from the Cases overview page:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Code Enforcement Cases** tile.
2. Click a case row.

   Alternately, click the **View Details** from the actions menu.
3. On the Case **Overview** page, in the header section, whenever more than two actions are available, the primary action is displayed as a button and the rest are available in the 3-dot action menu.

   When only one or two actions are available, they are displayed as buttons.

Reassigning Code Officers and Technicians

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

Access the **Reassign code officer** drawer. The header section displays the name of the current assignee. The list below displays the names of the code officers, their assigned district type, and district. Select a new code officer from the list to assign to the case. You can use the Search option by entering text to filter matching code officer rows.

If an officer is associated with multiple districts or district types, the record displays a link **Multiple District Types . Multiple Districts**. Click the link to open the District Information modal page and view all the associations for the officer.

Access the **Reassign code technician** drawer. The header section displays the name of the current assignee. The list below displays the name of the code technician and the count of open cases currently assigned to each. Select a new code technician from the list to assign to the case. You can use the Search option by entering text to filter matching code technician rows. Sort the list of the code technicians based on name or the count of open cases currently assigned to each. Click **Related** to view a list of all code technicians who are assigned the same district as the case to be reassigned. Click the **All** switch to view a list of all available code technicians irrespective of the district.

Use the **View History** button to review the list of all the technicians or officers previously assigned to the case, with the details of assignment date and time.

Assigning and Reassigning Multiple Cases

You can select multiple cases and assign them to a code officer or technician on the Cases page. Select one or more case checkboxes from the cases list and use the **Reassign Code Officer** or **Reassign Code Technician** buttons to open the reassign page to complete the action.

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

Creating a Case

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

To create a case without a reported incident:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Cases** tile.

   Alternately, from the Agency Springboard select Cases tile, and then select Cases.
2. The Cases page lists all cases created out of reported code violations. Click the **Create Case** button.

   The availability of this button is determined by your administrator's settings for the **Restrict Direct Case Creation without Incident** feature on the **Agency Information - Agency Features page**:
   - If this option is turned off, the **Create Case** button is available for all code officers to click and record a new violation without a reported incident.
   - If this option is turned on, the **Create Case** action is only available for code officers with the ADD_STANDALONE_CASE_PRIV privilege. The button is not available for users without this privilege.

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

   Based on your agency's configuration, you can also select a case status while creating a case. The other available statuses are *Violation*, *Legal* and *Mandatory Abatement*. When *Violation* is chosen, you can use the switches to select issuance of notice or schedule an inspection.

   The fields on this page are configured by the agency administrator who creates the intake form for the issue subtype. For more information about the issue intake form, see *Using the Intake Form Designer for Code Enforcement*.
7. On the Code Violations page, click **Add**. Select one or more code violations from a list of current or other violations and click **Done**. Click **Next**.
8. Review the information you entered on the Review page and click the **Submit** button.

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

Navigating to Case Details

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

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

1. To access the case details pages from the Fusion Applications Permitting and Licensing homepage, click the **Cases** tile.

   Alternately, select **Agency Springboard** > **Cases**.
2. On the Cases list page, locate the case you are working with and click the case row.
3. Navigate to case information using the links in the left panel.

The information for a case comprises these pages:

Page Name	Description
Overview	View the information highlights regarding the selected case with links to more detail. See *Viewing the Case Details Overview*.
Progress collapsible menu Timeline	View all the Code Enforcement events associated with a particular case in a chronological order. See *Working with Case Timeline*.
Workflow	View the workflow status of each task as defined by the agency in OCI Process Automation. See *Using Workflow*.
Inspections	View a list of inspections scheduled for the case. You can also schedule inspections from this page. See *Working with Code Enforcement Inspections*.
Time Recording	View a list of the recorded time that you spend working on transactions for the purposes of billing and reporting. See *Adding Time Entries*.
Case Details	View the case details as entered during the intake process.
Property Information	View parcel data from the case and a map of the parcel location. See *Working with Case Property Information*.
Related Transactions	Establish relationships between transactions and then perform actions such as viewing the related transaction applications. See *Working with Related Transactions*.
Code Violations	View a list of code violations related to the case. You can also add additional code violations from this page. See *Working with Code Violations*.
Citations	View a list of citations issued for the case. You can also issue citations from this page.

Page Name	Description
	See *Working with Citations*.
Attachments	View a list of files and upload or download documents on this page. See *Working with Code Enforcement Attachments*.
Appeals and Hearings	View a list of appeals and hearings that are raised for the case. See *Working with Appeals and Hearings*.
Responsible Parties	View the details of the party responsible for the violations leading to the case. You can also add a responsible party from this page. See *Adding Responsible Parties*.
Communication collapsible menu Notices	View a list of notices sent for the selected case. You can also generate notices from this page. See *Working with Notices*.
Communication	View a list of correspondence regarding the progress of cases. See *Working with Communications*.
Comments	Review or add comments pertaining to this case. See *Working with Comments*.
Fees and Payments collapsible menu Fee and Payments	Review citation fees assessed and payments due. See *Working with Code Enforcement Fees and Payments*.

Viewing the Case Details Overview

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

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

Using the Overview Page

1. From the Fusion Applications Permitting and Licensing homepage, click the **Cases** tile.

   Alternately, click **Agency Springboard** > **Cases**.
2. On the Cases page, click the case row to open the case you are working with.
3. On the Overview page, review important information about the selected case in separate sections.

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

   - **Actions** menu: Click the Actions menu from the Overview page banner. Depending on the case status and the role, agency users can perform these actions:
     - Update the status of the case
     - Assign officers and technicians to the case
     - Update compliance and appeal dates
     - Update appeal dates
     - Change issue description and priority of the case
     - Pay any case-related fees
   - **General Information** section: Review the following case details in the General Information section:

Page Element	Description
Case Status	Review the case status, which is updated by the workflow.
Priority	Indicates the priority of the case.
Code Technician Name	Displays the name of the code technician assigned to the case.
Code Officer Name	Displays the name of the code officer assigned to the case.
Case Reported Date	Review the date on which the incident was reported.
Comply By	Review the date by which the case must ensure compliance, which is calculated based on the time rules set up by the agency. If there is no comply by date recorded, the page shows the **Add** button. You can click to open the Update Compliance Date page and enter the comply by date. For details on updating compliance date, see the Updating Compliance Date section later in this topic.
Days left to Comply	Review the number of days left to ensure compliance.
Appeal By	Indicates the last date by which a user is allowed to submit an appeal for the case.

Page Element	Description
District Type District ID	Displays the district type and district ID under which the case is created.
Access Number	Displays a unique identifier generated at the time of case creation. The responsible party must provide the access number at the time of requesting access to their case. See *Resolving Issues*.
Issue Description	Review the description of the issue. To update the description, click the **Edit** link to open the Update Issue Description page and change the description text. Click **Done**.
Assign Code Technician, **Assign Code Officer**, **Reassign Code Technician**, **Reassign Code Officer** buttons	Use these buttons to assign or reassign code technicians and code officers to the case. If case assignments are yet to be done, then the Assign buttons are displayed. If case assignments are already done, then the Reassign buttons are displayed.
Days Overdue	Displays the number of days the case is overdue from the comply by date.
Complied On	Displays the date on which the case was moved to compliance.
Closed On	Displays the date on which the case was closed.
Reason for Closing	Displays the reason entered when the case was closed.
Transactions Identical to Case	Displays the incidents which are marked as duplicates of the current case.

- **Compliance and Closure Details** section: When a case status is changed to *Compliance* or *Closed* a **Compliance and Closure Details** section is displayed. Following elements are displayed on this section based on the case status:
  - Case complied on date
  - Case closed date
  - Reason for closing

- **Summary** section: Provides a pie chart representation of Notices, Code Violations and Fees.

  The Notices pie chart displays the total count of notices, as well as the count of notices associated with the case which could be in various statuses. The notice statuses available are In progress/Pending, Generated, Sent, and Hold/Canceled.

  The Code Violations pie chart displays the total count of violations associated with the case which could be in various statuses. The code violations statuses available are Open, Resolved, and Canceled.

  The Fees pie chart displays the total fees associated with the case in the selected currency. The pie chart displays Fees Paid and Balance Due.
- **Inspections** section: The Inspections section has the **Inspection ID** and **Next Inspection Scheduled For** fields.

  Click the **View Details** button to go to the details page of that particular inspection.

  Click the **Update Inspection Status** button to access a drawer and enable the **Mark the case as ready for inspection** switch to indicate that the case is ready for inspection.

  The Inspections section displays *Ready for Inspection*.
- **Incident Details** section: Whenever a case was created from an incident, an **Incident Details** section is displayed that shows the incident ID, reported date, issue type and subtype of the incident. Click the incident id link to open the Incident Overview page to view details of the incident associated with the case.

  Whenever incidents are marked as duplicates of a case, the count (as a number) is displayed in this section. Click the <number> link to open the **Identical transactions** drawer. All the incident IDs which were marked as duplicates of the incident associated with this case are listed here. Click the incident ID to open incident details page.
- **Citation**: When a new citation is added to the case, a message is displayed at the top of the Overview page. To see details, click the **View Details** link.

Updating a Case Status

To manually change the status of a case:

1. On the Cases page, click the **Update Case Status** button.

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

2. On the **Case status details** drawer, select a new status, from the drop-down list, and enter a reason for the change.

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

   An **Apply Complied on Date to All Open Code Violations** switch is displayed when the case has at least one code violation associated with it. This switch appears disabled when there are open code violations associated with the case. The disabled switch indicates that all the open code violations associated with this case will also be resolved when the case status is set to *Compliance* or *Closed* with reason as *Compliance*.
3. Click **Save**. Depending on the status you select, the workflow stages and their tasks are updated accordingly.

Updating Case Compliance Date

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

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

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

To update the compliance date from the Case Overview page:

1. On the Case Overview page, click the **More Actions** menu and select the **Update Compliance Date** action.
2. On the **Compliance details** page, select a new date from the calendar.
3. Review the comply by dates and use the switch to decide whether to apply the updated case comply by date to all open code violations for the case.

   See the following elements on the Compliance details drawer:

Page Element	Description
Current Comply by Date	Displays the existing comply by date of the case.
New Comply by Date	Enter the new comply by date for the case.
Next Inspection Scheduled For	Displays the date for the next scheduled inspection. Whenever an update is made to the case comply by date, the system automatically updates the next inspection scheduled for date, based on the time rules set. You can also see this change on the Inspections page. See *Working with Code Enforcement Inspections*. For details on time rules, see *Setting Up Time Rules*.
Apply Updated Compliance Date to All Open Code Violations	Turn the switch on to apply the updated case comply by date to all open code violations for the case.
Earliest of Comply by Dates in Violations	Displays the earliest date among all the comply by dates that correspond to the open code violations for the case.
Latest of Comply by Dates in Violations	Displays the latest date among all the comply by dates that correspond to the open code violations for the case.
Reason	Enter a reason for the change in the Reason field.

Page Element	Description

4. Click **Save**.

Working with Case Timeline

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

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

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

Viewing a Case Timeline

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

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

Page Element	Description
Filter button	Filter the cases based on event types, such as, **All**, **Appeal**, **Case created**, **Hearing**, **Case updated**, **Inspection**, **Notice**, **Fee paid** and **Incident reported**.
Print button	Print a copy of the current timeline.
Download button	Download the case events to an Excel spreadsheet.
Show List View button	Display the case events in a list view. The details displayed include the date and time, the event type, case status, name of the agent who created or updated the event, and the reason or description of the event. Click the chevron at the end of each row to go to the Case Overview page.

Page Element	Description
Show Timeline View button	Display the case events in a horizontal timeline view. The date range is set to start from 30 days before the initial event and to end 30 days after the last event.

Working with Case Property Information

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

Viewing Parcel Information

You view the parcel associated with this case on the Property Information page.

1. From the Fusion Applications Permitting and Licensing homepage, click the **Cases** tile.
2. On the Cases page, click the row for the case you are working with.
3. From the left panel **Case** menu, select **Property Information** to open the detail view of the property.

Page Element	Description
Case Address	View the address of the property associated with the case. If the case address exists in the system, click the link to access the parcel details page to view more information. This address can be updated by the agency staff.
Parcel	View the parcel ID of the property associated with the case. If the parcel ID exists in the system, click the link to access the parcel details page to view more information.
Additional Location Details	View any additional location details for the case address.
Owner	View the name of the owner of the property associated with the case.
Address Condition	View the name of a condition, if the address associated with the case has a condition applied to it. Click the condition link to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.
Parcel Condition	View the name of a condition, if the parcel associated with the case has a condition applied to it. Click the condition link to see a list of all applicable conditions, including the condition name, severity, description, and when the condition was applied.
District Type	Identifies the code enforcement district type for the case. For example, cases might be associated with a fire prevention district type.

Page Element	Description
	The district type is inherited from the issue subtype. If the field is blank because the issue subtype doesn't have a district type, you can manually select one.
District	Confirm or update the specific district where the case is located. This district is based on the district type and the issue location: ◦ With GIS integration, the system finds the district using the GIS map layer that is associated with the district type. ◦ If the agency doesn't use GIS integration, the system looks for the code enforcement district that is associated with the parcel. ◦ If the system is unable to determine the district, you can manually enter one. The district determines the default code officers for the case. Code officers are assigned to specific districts using the Code Enforcement Districts attribute of the Code Enforcement Officer job function.
Edit Case Address button	Click the button to open a drawer to update the case address. Only the agency users with the required access rights can edit this information.
Select from Parcel button	Click the button to open a drawer to select a property already existing in the system.
•••	The more actions button provides additional options to: ◦ Select a property from the map ◦ Edit district information ◦ Update property information
Reported Address	View the address from which the incident was reported. This address cannot be modified.

Changing Property

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

1. In the case details page, select the Property Information tab in the left panel to open the detail view of the property.
2. On the Property Information page, click the **Select from Parcel** button.
3. On the Search Property page, search a new parcel and click **Done**.
   You can also search for properties using the filters for address, parcel number or name of the owner.

Updating Property Address

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

1. In the case details, select the Property Information tab in the left panel to open the detail view of the property.

2. On the Property Information page, click the **Edit Case Address** button.
3. On the Case Address drawer, you can enter new values for the address, city, and state. Click **Save**.

Viewing Cases Associated with a Parcel

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

For more information, see *Viewing Transactions Associated with a Parcel or Property Address*.

Using Workflow in Code Enforcement

This topic describes how to manage the workflow in code enforcement. For general information on workflow, see *Using Workflow*.

Managing Workflow Tasks in Code Enforcement

For Code Enforcement – Incident and Case, the Workflow pages can be toggled between a Stage view and a Milestone view.

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

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

Workflow Task Assignment Changes with Reassignments

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

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

Using the Stage View or Milestone View in Code Enforcement

The Code Enforcement – Incident and Case Workflow pages display cards at the top of the page with a Task panel. With Code Enforcement, the underlying process definition differs from the type used for permits or planning applications. A process definition used for Code Enforcement is a *dynamic* process definition based on stages and milestones.

You can toggle between a stage view and milestone view. In the stage view, the agency staff gets a quick indication of the number of stages in the workflow as cards at the top of the page. You can click a stage to view details in the task panel below.

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

To access Incident or Case Workflow page in the stage view:

1. From the Fusion Applications Permitting and Licensing homepage, click the **Incidents** or **Cases** tile.

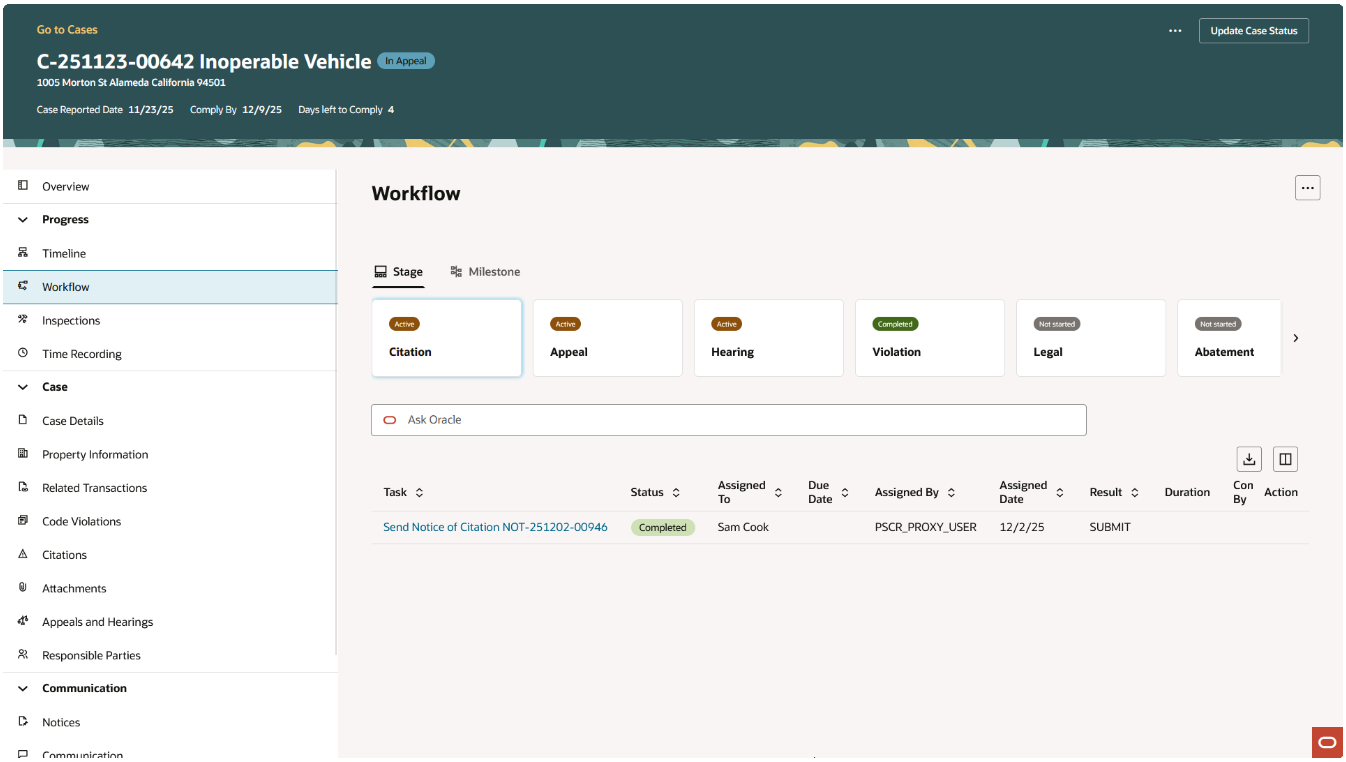
You can also select the **Incidents** or **Cases** tile on the agency springboard.

2. Click the row for the incident you want to view. Or, from the Actions menu, click the **View Details** button for the case you want to view.

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

   By default, the Workflow page for Code Enforcement displays the stage view as shown below.

   This example illustrates the Code Enforcement – Case Workflow page in the stage view.


Go to Cases
Update Case Status
C-251123-00642 Inoperable Vehicle
In Appeal
1005 Morton St Alameda California 94501
Case Reported Date 11/23/25
Comply By 12/9/25
Days left to Comply 4
Overview
Progress
Timeline
Workflow
Inspections
Time Recording
Case
Case Details
Property Information
Related Transactions
Code Violations
Citations
Attachments
Appeals and Hearings
Responsible Parties
Communication
Notices
Workflow
Stage
Milestone
Active
Citation
Active
Appeal
Active
Hearing
Completed
Violation
Not started
Legal
Not started
Abatement
Ask Oracle
Task
Status
Assigned To
Due Date
Assigned By
Assigned Date
Result
Duration
Con By
Action
Send Notice of Citation NOT-251202-00946
Completed
Sam Cook
PSCR_PROXY_USER
12/2/25
SUBMIT

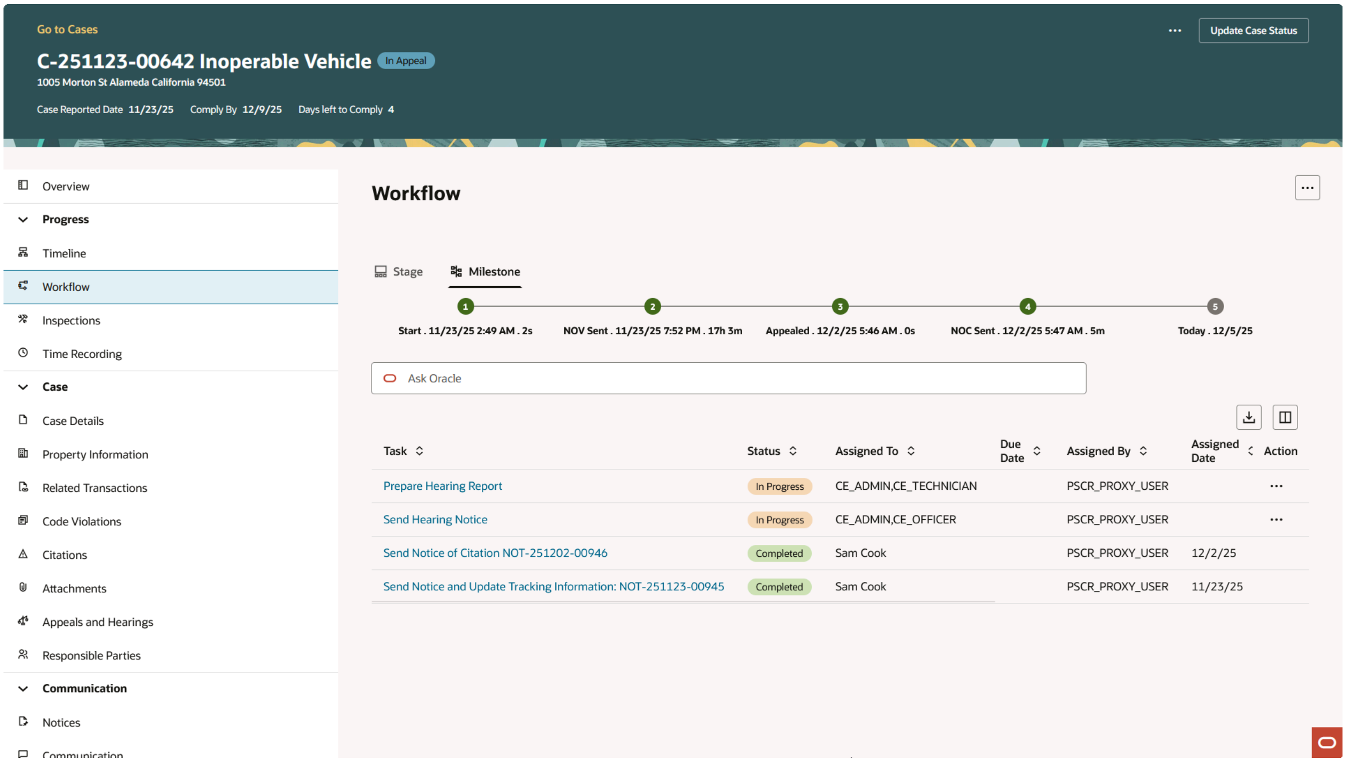
Page Element	Description
Stage View and **Milestone View** icons	Use these buttons to toggle between the stage and milestone views.
Stages	Click the stage cards at the top of the Workflow page to open the tasks associated with it in the task panels below. The names of these stages and their labels are displayed as configured in the OCI Process Automation workflow process definitions that are defined by the agency. The stages display different badges to show their status: • Active • Completed • Not Started • Terminated You can click the active and completed stages to view their details in the Task panel below. Examples of stages that appear in an incident's workflow include *Reported*, *Inspection*, *Violation*, *Legal,* and *Closed*.
Task Panel	The Task panel displays the tasks associated with the selected stage. Click a task row to open and view all information related to that task in the details drawer.
Action button on the Workflow page	Click the three-dot action menu on the workflow page to: • View Process Information • Terminate Workflow
View Process Information	Click this action menu item to view details about the process information.
Terminate Workflow	Click this action menu item to stop or terminate a workflow. Once a workflow has started, the **Terminate Workflow** option allows agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff. **Note:** You can't activate a terminated workflow.

To access the Incident or Case Workflow page in the milestone view:

1. Select the **Incidents** or **Cases** tile on the agency springboard.
2. Click the row for the incident or case you want to view.
3. Use the navigation links in the left frame to select **Workflow**.

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

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


Go to Cases
Update Case Status
C-251123-00642 Inoperable Vehicle
In Appeal
1005 Morton St Alameda California 94501
Case Reported Date 11/23/25 Comply By 12/9/25 Days left to Comply 4
Overview
Progress
Timeline
Workflow
Inspections
Time Recording
Case
Case Details
Property Information
Related Transactions
Code Violations
Citations
Attachments
Appeals and Hearings
Responsible Parties
Communication
Notices
Workflow
Stage
Milestone
Start . 11/23/25 2:49 AM . 2s
NOV Sent . 11/23/25 7:52 PM . 17h 3m
Appealed . 12/2/25 5:46 AM . 0s
NOC Sent . 12/2/25 5:47 AM . 5m
Today . 12/5/25
Ask Oracle
Task
Status
Assigned To
Due Date
Assigned By
Assigned Date
Action
Prepare Hearing Report
In Progress
CE_ADMIN,CE_TECHNICIAN
PSCR_PROXY_USER
Send Hearing Notice
In Progress
CE_ADMIN,CE_OFFICER
PSCR_PROXY_USER
Send Notice of Citation NOT-251202-00946
Completed
Sam Cook
PSCR_PROXY_USER
12/2/25
Send Notice and Update Tracking Information: NOT-251123-00945
Completed
Sam Cook
PSCR_PROXY_USER
11/23/25

Page Element	Description
Stage View and **Milestone View** icons	Use these cards to toggle between the stage and milestone views.
Milestones	Displays the milestone tasks and the date on which they were completed for the selected incident. Examples of milestone tasks that appear in an incident's workflow include *Start*, *Incident Reported*, *Inspection Schedule* , and *Closed* .
Task Panel	The Task panel displays the tasks associated with the selected stage. Click a task row to open and view all information related to that task in the details drawer.
Action button on the Workflow page	Click the three-dot action menu on the workflow page to: • View Process Information • Terminate Workflow
View Process Information	Click this action menu item to view details about the process information.
Terminate Workflow	Click this action menu item to stop or terminate a workflow. Once a workflow had started, the **Terminate Workflow** button allows an agency staff to stop the workflow at any stage without completing the remaining tasks. This action terminates or cancels all the tasks in the workflow, even if it was open for an agency staff. **Note:** You can't make a terminated workflow active again.

Working with the Code Enforcement Task Details

You can view the details of the code enforcement case or incident workflow tasks in the details drawer.

1. Select the workflow stage in either stage or milestone view, and from the Tasks lists below, click a task row to open the task details drawer.
2. View the elements of the task details drawer:

Page Element	Description
Task ID	Displays the unique identification number for the task.
Reassign	Click the **Reassign** button to reassign the incident or case to a different code technician or code officer.
Claim	Click the **Claim** button to claim an incident or case.
Task details	Displays the options to add a result for the task and set the priority of the task.
Result	View or select the result for the task.

Page Element	Description
Priority	View or set the priority of the task. The options include: *Low*, *Medium*, and *High*.
Documents Checklist	Lists the documents that can be added for the task. Select the checkbox next to the required document.
Comments	View or add comments for the task. To know more about comments, see *Working with Comments*.
Attachments	View or add attachments for the task. To know more about managing attachments, see *Working with Code Enforcement Attachments*.
Form	Use the form to check or enter information as specified by the agency. Code Enforcement – Incident and Case Workflow details drawer has an option to include a form or a checklist. This form is customizable by the agency to cater to their specific requirement.

Using a Form in Code Enforcement – Incident and Case Workflow Pages

Code Enforcement – Incident and Case Workflow pages have an option to include a form or a checklist in the Task Details drawer. The agency can customize the form for their specific requirement.

An example of an incident task having a form can have the following checkpoints for the agency staff:

- Check if Repeat Offender
- Send Courtesy Notice

An example of an abatement task having a form can have the following checkpoints for the agency staff:

- Schedule Inspection Post Abatement
- Add Fee
- Send Notice

Working with Code Enforcement Inspections

The case information includes a consolidated list of inspections that are carried out and those that are scheduled for a case. As a code technician you manage inspection activity for a case — including reviewing inspection count, status, assignments, schedule dates, results and more — on the Inspections page.

As agency staff, you use the Inspections page to view a complete list of case inspections that were carried out and scheduled for future. Access the inspections list in the case details to perform these tasks:

- Review inspection activity recorded by the inspector.
- Perform actions such as scheduling, rescheduling, and canceling an inspection.

> **Note:** As part of the inspection process, an inspector performs inspections, add comments and attachments, and submit a result of the inspection. If the submitted result is Violation or Citation, all the entered details are captured and made available on the Inspections page of the case. The Inspections page can be accessed by the agency staff only on a laptop or a desktop computer. For details on managing inspection on a mobile device, see *Accessing the Code Officer Application*. For details about managing inspections on a laptop or desktop computer, see *Using the Code Officer Worklist*.

Viewing Inspection Information

1. From the Fusion Applications Permitting and Licensing homepage, select the **Cases** tile.
2. On the Cases page, click the case row to open the case you are working with.
3. Click **Inspections** in the left navigation panel of the case details.
4. On the Inspections page, you can view inspection information in these fields:

   If the case originated from an incident, you can see separate tabs for Case and Incident.

Page Element	Description
Inspection	View the number of inspections carried out till date for the case. The maximum inspections per day per code officer is set up by the agency administrator on the Code Enforcement Options drawer. See the Configuring Inspections section in *Setting Up Agency-Level Options for Code Enforcement*.
Count	The count of the inspection such as 1st, 2nd, and so on.
Status	View the status of the inspection: ◦ Completed ◦ Scheduled ◦ Canceled
Assigned To	Identifies the officer assigned to the case.
Scheduled Date	View the date on which the inspection is scheduled.
Inspection Due By	View the due date for completing the inspection.

Page Element	Description
Inspection Completion Date	View the date on which the inspection was completed.
Outcome	View the result of the inspection. ◦ **In compliance** ◦ **Not in Compliance**: This value is displayed as the result of inspection for a case in *Appeal*, *Hearing*, or *Legal* status. ◦ **Violation** ◦ **Referral** ◦ **Remains in Violation** ◦ **Issue Citation** ◦ **Remains in Citation** ◦ **Extension** ◦ **Mandatory Abatement** ◦ **Closed** For more information, see *Submitting Code Enforcement Inspection Results*.

5. On the Inspections page, you can perform the following actions.

   These actions are available as buttons or three-dot action menu items at the top of the page or as three-dot Action menu items at the row level.

   - **Schedule Inspection**: Click to open the **Schedule inspection** drawer and use the calendar to select from the dates that the assigned officer is available for an inspection.

     > **Note:** This option is available only if there are no pending inspections scheduled. The status of all the inspection schedules must be either Completed or Canceled.

   - **Reschedule**: From the three-dot Actions menu on the inspection row, click to open the Reschedule Inspection drawer and use the calendar to select the next available date for the assigned officer to schedule the inspection.

     > **Note:** This option is available only for inspections that are not completed.

   - **View Details**: From the three-dot Actions menu on the inspection row, click to open the Inspection page. You can view details about the inspection, as well as associated code violations, comments, attachments, time recording, and prior inspections.
   - **Cancel**: From the three-dot Actions menu on the inspection row, click to cancel the inspection schedule.

     > **Note:** This option is available only for inspections that are not completed.

   - **Update Case Status**
   - **Update Compliance Date**: Click to open the **Compliance details** drawer and enter a new comply by date for the case. You can also turn on the switch to apply the updated compliance date to all open code violations.
   - **Update Appeal Date**
   - **Update Issue Description**: Click to open the **Issue Description**drawer and update the description which was entered during the intake process. However, the issue description in the **Case Details** page will still display the original version entered during the intake process.
   - **Update Priority**: Click to open the **Update Case Priority** drawer and turn on the **Priority** switch. You can also update the compliance date.

Viewing Inspection Details

1. On the Inspections page, click the inspection ID link for the inspection record you want to view.

2. On the Code Enforcement Inspection page, you can view the details of the inspection included by the officer at the time of inspection.

   You can view a summary of the inspection, such as its status, inspection ID, and its count (configured by the administrator on the Inspection Count page). You can also see the details of the associated case, such as the case status, case ID and its issue subtype.

   On the top left of the page, you can view a summary of the inspection, such as its status, inspection ID, and its count (configured by the administrator on the Inspection Count page). You can also see the details of the associated case, such as the case status, case ID and its issue subtype.

   View more details of the inspection assigned to you on the page:

   - Location
   - Schedule date
   - Due date
   - Comply by date
   - Code Officer
   - Code Technician
   - Inspection Outcome: Displayed when the inspection is complete and an outcome is available.
   - Completion date: Displayed when the inspection is complete.
   - Ready for Early Inspection switch
   - Case or Incident details, including link to the case or incident
   - Issue description

3. Click the **Result** button to view the possible outcomes of the inspection.

   - **In compliance**
   - **Not in Compliance**: This value is displayed as the result of inspection for a case in *Appeal*, *Hearing*, or *Legal* status.
   - **Violation**
   - **Referral**
   - **Remains in Violation**
   - **Issue Citation**
   - **Remains in Citation**
   - **Extension**
   - **Mandatory Abatement**
   - **Closed**

4. From the three-dot Actions menu, click **Reschedule** to open the **Reschedule** drawer and use the calendar to select the next available date for the assigned officer to schedule the inspection.

   > **Note:** This option is available only for inspections that are not completed.

5. Click **Cancel Inspection** to cancel the inspection schedule.

   > **Note:** This option is available only for inspections that are not completed.

6. On the right, you have separate foldouts for Code violations, Comments, Attachments, Time Recording, Prior Inspections.

   From the Code Violations section, view a list of code violations with their status.

   You can also add new code violations to the case. Click the **View all violations** link at the bottom of the foldout, to access the Violations page. Here, you can see all the violations associated with the case and their statuses. You can take various actions for these violations, such as adding new ones, resolving, removing from the case, and editing the compliance date.
7. From the Comments section, view a list of comments associated with the inspection. Click the **View all comments** link at the bottom to access the Comments page and view all comments for the inspection under separate tabs for Inspection, Case and Incident. For details, see *Working with Comments*.
8. From the Attachments section, you can view all attachments associated with the inspection. You can also add (drag and drop) new files to the inspection. Click the **View all attachments** link at the bottom to access the Attachments page and view all attachments for the inspection under separate tabs for Inspection, Case and Incident. For details, see *Working with Code Enforcement Attachments*.
9. From the Time Recording section, you can view all the time entries made for the inspection. Click the Add (+) icon to add new time.
10. From the Prior Inspections section, you can view all previous inspections for the case.

Scheduling Inspection

1. From the Fusion Applications Permitting and Licensing homepage, select the **Cases** tile.
2. On the Cases page, click the case row to open the case you are working with.
3. Click **Inspections** in the left navigation panel of the case details.
4. On the Inspections page, click **Schedule Inspection**.

   This button is available only if there are no inspections already scheduled for the case.
5. On the **Schedule inspection** drawer, you can use the **Priority** switch to change the priority of the inspection. The Due Date field shows the due date for completing the inspection, which is determined by the time rules set up by your agency. Use the **Inspection Date** field to select a date from the calendar. From the Assign Code Officer section, select a code officer for the inspection.

   > **Note:** If a Code Officer is already selected for the inspection, then the calendar shows only those dates that the assigned officer is available for carrying out the inspection.

6. Click **Save**.

   The new schedule is listed in the Inspections page and the **Schedule Inspection** button is no longer displayed. The assigned officer receives a notification on their mobile application about the new inspection schedule.

Rescheduling and Canceling Inspection

You can reschedule or cancel an inspection schedule that is not completed.

1. From the Fusion Applications Permitting and Licensing homepage, select the **Cases** tile.
2. On the Cases page, click the case row to open the case you are working with.
3. Click **Inspections** in the left navigation panel of the case details.
4. To reschedule, click **Reschedule** on the inspection row. On the **Reschedule Inspection** drawer, use the **Next Schedule Date** field to select a date from the calendar, which shows only those dates that the assigned officer is available.

5. To cancel the schedule, click **Cancel** on the inspection row.

   You can cancel a scheduled inspection for an incident or case. Once canceled, the status changes from Inspection to Reported. The Inspections page will retain a row for the canceled inspection. After canceling, you can schedule a new inspection using the **Schedule Inspection** button.

Working with Notices

Once a case is created, a corresponding notice object is automatically created and access is made available in the Code Technician Worklist and in the case details. As agency staff, you generate a notice from the notice object, update the various details, review, edit, and print it for dispatch. Agency staff can also manually add ad hoc notices for a case using the Oracle Municipal Code Officer mobile application or from the desktop application.

You can access the notice record using any of the following navigations:

- *Notices from the Case Overview page*:

  From the Fusion Applications Permitting and Licensing homepage, click the **Code Enforcement Cases** tile. Select the case you are working with. On the Overview page, scroll down and open the **Communication** expandable menu, and select **Notices**.
- *Notice of Violation* and *Notice of Citation* tab:

  Agency Springboard > **Code Technician Worklist** > **Notice of Violation** and **Notice of Citation**. The **Generate** or **Continue** option is available in the row. Click **View More Details** if you want to view the complete details.
- *Inspection page*:

  In the Oracle Municipal Code Officer Mobile application, you can access the Inspection page by selecting an inspection item on the Worklist page.

  > **Note:** You can't edit notices when you are adding it from the Code Enforcement Inspection page. However, notices generated from the Case Overview page and the Code Technician Worklist can be reviewed and edited before printing. For more information, see **Generating a Notice** section in this topic.

Viewing Notices

You view a list of notice records for the case citation and violation in the case detail pages.

The **Notices** page shows the list of all notices for the case – including the notices added from the mobile application. You can use the Search option to search for a notice based on its ID or name. View the information and perform actions as described here:

Page Element	Description
Notice ID	View the identifier of the notice.
Notice	View the generated name of the notice, based on the nature of violation.
Status	View the status of the notice:

Page Element	Description
	• *Pending*: Indicates that the notice object is created. • *In Progress*: Indicates that details are entered in the notice and saved. • *Generated*: Indicates that the notice is generated and printed. • *Sent*: Indicates that the notice has been sent to the responsible party. • *Received*: Indicates that the notice was received by the responsible party.
Type	View the type of notice: • Ad hoc • System
Category	View the category of the notice.
Count	View the reference value that determines when the ad hoc notice must be applied.
Case Status	View the status of the case: • Violation • Citation
Notice Creation Date	View the date on which the notice was created.
Generated Date	View the date on which the notice was generated.
Sent Date	View the date on which the notice was dispatched.
Tracking Number	View the tracking number associated with the shipment of the notice.
Actions	Select from available options, which are based on the status of the notice: • *Review Case and Notice Details*: Click to open the Review Case and Notice Details drawer. This option is available only for the notice records in Pending status. • *Preview and Generate Notice*: Click to open the Preview and Generate Notice drawer. This option is available only for the notice records in Pending status. • *Continue*: Click to open the Generate Notice page and complete the details of the previously saved notice. This option is available only for the notice records in In Progress status. • *Cancel Notice*: Click to cancel the notice. This option is available only for the notice records in **Pending** or **In Progress** status. See the section, Canceling a Notice • *Mark as Sent*: Click to mark a notice as sent. This option is available only for the notice records in the **Generated** status. • *Update Tracking Details*: For generated notices, click to open the update tracking details page. • *View Generated Notice*: For generated notices, click to view the generated notice. • *Update Generated Notice*: For generated notices, click to make any updates to the generated notice.

Page Element	Description
	• *Add Additional Attachments*: For generated notices, click to add any additional attachments.

Creating an Ad Hoc Notice

To manually create an ad hoc notice for a case:

1. Navigate to the notice record using one of the methods listed in the previous section.
2. Click the **Add Notice** button.
3. On the Add Notice drawer, use the **Category** field to select a category of the notice, which is set up by your agency in the **Ad Hoc Associations** section on the Notice and Report Group page.
4. Use the **Select** button on the notice record you want to add. You can use the Search option to search for and select the ad hoc notice subtype applicable for the case.
5. The Add Notice page closes and the Notices page now lists the new ad hoc notice record.

Editing Notice Details

You can review and update the notice details before generating it.

1. Click the **Actions** button on the notice row that you want to update. The available actions include, *Review Case and Notice Details*, *Preview and Generate Notice*, *Mark as Sent*, and *Cancel Notice*.
2. On the Review Case and Notice Details drawer, see the following elements:

Page Element	Description
Notice details section	Displays details such as notice template used, notice ID, category, notice created date, type and the count.
Change Notice Template button	Click the button to open the Notice Template popup window. Here, the available notice templates are listed. Select one and click **Done** to change the notice template.
Case details section	Displays the case details such as status, case ID, issue type and subtype, location, compliance date and issue description.
Citation details section	Displays the citation ID and due date.
Responsible Party and Mailing Address section	Displays search option and an Add button to add a new responsible party. On the Add responsible party popup window, you can add a new record by entering the details or you can click the **Select from List** dropdown menu to search and select an existing parcel owner record. For details, see *Adding Responsible Parties*. The grid below lists the responsible parties related to the case with their address and phone numbers. It also lists their status (whether active or inactive), type of associate (for example, applicant, business owner, tenant, property manager, lawyer, etc) or if they are the primary contact. Notices will be sent to all the listed parties. The Actions button on the row gives you the options to view and edit the responsible party details or change the status to inactive.

Page Element	Description
	Note: You cannot make a primary contact inactive from the row action menu.
Code References section	Review the list of code violations. For a notice of violation, the list shows the violations that are in Open status. The notice of citation list shows all the violations in their current status. Click a row to open a **Code violations** popup window with the corrective actions.

Generating a Notice

You can generate a notice from the case details - Notices page, and Code Technician Worklist.

> **Note:** Ad hoc notices can also be generated from the Code Enforcement Inspection page, but these cannot be reviewed or edited before printing.

1. Navigate to the notice record using one of the methods listed in the previous section.
2. Click the **Actions** menu and then select the **Preview and Generate Notice** button.

   > **Note:** This option is available only for the notice records in Pending status. If the status is in In Progress, you will see the **Continue** option. Use this option in case the notice was generated earlier and saved for later.

3. On the Preview and Generate Notice drawer, you can see the following elements.

Page Element	Description
Selected Template section	Displays the name of the notice information such as the name, ID and count.
Preview Notice icon	Click the **Preview Notice** icon to preview the notice.
Edit notice switch	Turn on this switch to download and edit a generated notice. After making the changes you can add the edited notice as an attachment.
Download Notice button	Click this button to download the generated notice.
Edited Notices section	Lists all the edited notices added as attachments.
Add Attachments	Click this button to re-upload an edited notice as an attachment. Whenever an attachment is added it has to be marked as either a draft or final.

Page Element	Description
	Note: Until an edited notice is marked as Final, the generate buttons will remain disabled. You can only have one edited notice marked as Final. After editing and marking a notice as final, if you turn off the **Edit notice** switch, the edited notice will be retained but the Edit Notices grid will be hidden. The notice will revert to the system selected and unedited version.
Actions menu	Click the row actions menu to perform any of the following actions: *View Details*, *Download*, *Preview*, *Delete*, *Mark as Final*.
Tracking Details section	Use the **Update Tracking Details** button to enter the details of the notice shipment, such as the sent date, carrier name, tracking number, and any comments. **Note:** Generating a notice after adding a sent date in the tracking details will not change the status of the notice. From the notice row, click the action **Update Tracking Details** to open the drawer and turn on the sitch to mark the notice as sent.
Generate	There are two buttons to generate notice on the Preview and Generate Notice drawer: **Generate** and **Generate and Send**. If there are edited notices, these buttons are made active, only when a notice is marked as final. Click **Generate** to only generates a notice. Here, the status of the notice record changes to Generated, and the **Sent Date** on the Notice Details page remains blank. You can mark these notices as sent, from the Action menu on the Notice Details page. Once marked as sent, the sent date gets displayed on the Notice Details page and the notice status changes to **Sent**. When the status of a notice record changes to Generated, the record gets removed from the worklist. You can access the record on the Notices page, which lists all the notices records for the case.
Generate and Send	Click **Generate and Send**, to generate, as well as send a notice to the responsible party. Here, the status of the notice record changes to **Sent**. On the Notice Details page, you can see the **Sent Date** of the notice.

4. Click **Save Changes**. You can close the window and return to the notice at a later time.

> **Note:** The status of the notice changes when you enter the dates for the Sent Date or Received Date fields and save the page.

Canceling a Notice

You can cancel a notice when its status is *Pending* or *In Progress*. On the Notices page use the **Cancel** option from the **Actions** menu to cancel the notice. The notice status changes to *Canceled*, and the notice count value reduces by one if it's a system generated notice.

Workflow Impact: When a Notice is canceled, a new task – **Canceled Notice** is created along with the existing open tasks related to the notice. Agency staff review the workflow tasks and take necessary actions such as closing the tasks manually.

> **Note:** The citation object and fees associated with the notice remain unaltered when a notice is canceled.

See *Using Workflow in Code Enforcement*.

Working with Code Violations

Agency staff view, add, and manage code violations associated with a case on the Code Violations page. You add one or more code violations to a case based on the specific code used on a violation.

In addition to the code violations included by the system based on the incident issue type, code officers add code violations during their inspection using their mobile device.

Agency staff such as a code technician manage the code violations using the Code Violations page in case details. For more information on mobile inspections, see *Accessing the Code Officer Application*.

Viewing and Modifying Code Violations

View a list of code violations that were added by the officer and the technician, along with their corrective actions to resolve the violation.

> **Note:** By default, all code violations associated with a case will have the same comply by date as the case compliance date. You can change the code violation comply by dates using the Update Details action on the Code Violations page. For details, see the Updating Code Violation Details section below.

1. From the Fusion Applications Permitting and Licensing homepage, click the **Cases** tile.

   Alternately, click **Agency Springboard** > **Cases**.
2. On the Cases list page, click the row for the case row you want to access.
3. On the Cases page, click **Code Violations** in the left panel to open the list of code violations. The Code Violations page displays the case comply by date, and buttons **+** button (to add a new code violation), **View**

History button, and , to view the other available actions. You can see details on how to add new code violations, view history, and take actions in the later sections.

Each code violation record displays a summary, code violation status and comply by date. Listed below are the code violation statuses:

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

Once a code violation is resolved, you can also view the date on which it was complied on.

Expand each code violation record to view the description and corrective actions.

4. As agency staff, you can use the **Update Details** option fron the row actions menu to modify the summary and descriptions for violations. You can also modify the description for corrective actions. The Description field enables you to use Rich Text formatting options for the text you enter.

Adding Code Violations

You add code violations to a case using the **Add violation** drawer.

1. On the Cases page, click **Case Violations** in the left panel to open the list of code violations.
2. Click the **+** button to open the **Add violation** drawer, search, and select violations.

   Search by entering the name of a specific code violation using the look-up.

   Select one or more code violations using the checkboxes and click **Add Selected** to include them in the case, and return to the Code Violations page.

Viewing Code Violation History

You can view the history of a code violation associated with a case using the Code Violation History page.

1. On the Cases page, click **Case Violations** in the left panel to open the list of code violations.
2. Click the **View History** button to open the Code Violation History page.

Page Element	Description
Code Reference ID	The unique identifier of the code violation.
Updated Attribute	The attribute which was updated.
Source	The source from which the change originated. It can be from case, hearing or inspection.
Old Value	The previous value of the changed attribute.
New Value	The new value of the changed attribute.

Page Element	Description
Updated By	Displays the name of the agency user who last updated the code violation.
Last Updated Date	Displays the date on which the code violation was last updated.
Reason for Update	View the reason for the update as added by the agency staff.
Reason Details	View the description regarding the reason for update as added by the agency staff.

Taking Actions on Code Violations

Code technicians use the 3-dot Actions menu to take actions such as Resolve, Remove from Case, Update Details, and Reopen.

1. On the Cases page, click **Code Violations** in the left panel to show the list of code violations.

Expand the code violation record and click the three-dot actions menu to take any of the following actions:

Element	Description
Resolve	Select to resolve the code violation. You can choose any date from the case creation date to the current date. For details, see the Resolving Code Violation section later in this topic.
Remove from Case	Select to remove the code violation from the case. The status of the code violation changes to Canceled. **Note:** You cannot delete a code violation from a case. Also note that you cannot remove a code violation that is associated with a citation. When a code violation is removed from a case, all its paid fee items, including the recurring fines, ad hoc and one-time fines, are changed to the *Canceled* status. For details about deleting code violations from an inspection, see the section *Using the Code Enforcement Inspection Page* under the topic *Using the Code Officer Worklist*.
Update Details	Select to update the code violation details, like the compliance date and the rates and fines for the code violation. For details, see the Updating Code Violation Details section below.
Reopen	Select to reopen the code violation from its resolved or canceled status. This option is not available if the case is in one of the statuses – Compliance, Closed, or Void.

Element	Description
	On the Reopen Code Violation page, you can enter a new comply by date for the reopened violation and add comments. This page also lists the case comply by date, and the earliest date and latest among all the comply by dates that correspond to all the open code violations for the case.
Add One-Time Fee	Select to add a one-time fee for the current code violation. All fee items added via this action are included in the Total Fine listed in the Code Violations Update Details page. The Fees and Payments page also includes these fee items under the Total Fees with the current code violation as its reference ID. For details, see *Working with Code Enforcement Fees and Payments*. This option is not available if the case is in the Canceled status.

Resolving a Code Violation

You can resolve and enter a complied on date for a code violation.

To resolve a code violation:

1. On the Cases page, click **Code Violations** in the left panel to show the list of code violations.
2. On a code violation record, click the three-dot **Actions** menu and select **Resolve**.

Page Element	Description
Header	Displays the identifier for the code violation and its summary.
Comply By	Displays the comply by date of the code violation.
Complied On	Enter a date from the calendar to update the date on which the code violation was complied on. You can choose any date from the case creation date to the current date. Whenever applicable, the earliest and latest comply by dates automatically changes to synchronize with the new comply by date chosen.
Last Updated Date	Displays the date on which the code violation details were last updated.
Case Comply By	Displays the comply by date of the case.
Earliest of Comply by Dates in Violations	Displays the earliest date among all the comply by dates that correspond to open code violations for the case.
Latest of Comply by Dates in Violations	Displays the latest date among all the comply by dates that correspond to open code violations for the case.
Next Inspection Scheduled For	Displays the date on which the next inspection is scheduled.

Page Element	Description
Reason for Update	Enter the reason for closing code violation.
Reason Details	Add a description to give more details regarding the reason for update.

Updating Code Violation Details

You can update the details of a code violation, like the compliance date and the rates and fines associated with it.

To update code violation details:

1. On the Cases page, click **Code Violations** in the left panel to show the list of code violations.
2. On a code violation record row, click the three-dot **Actions** menu and select **Update Details**.

Page Element	Description
Code Violation Status and Compliance Dates section **Status**	Displays the status of the code violation. The values include, Open, Canceled and Resolved.
Comply By	Enter a date from the calendar to update the comply by date for the code violation. Whenever you choose a violation comply by date which is greater or lesser than the current case comply by date, the case comply by date, as well as the earliest and latest comply by dates automatically changes to synchronize with the new dates chosen. When a violation comply by date is set to a previous date, then the case comply by date remains unchanged, but the earliest of comply by dates synchronizes with the new date. When a violation comply by date is extended beyond the case comply by date, then the case comply by and the latest of comply by dates synchronizes with the new date. This is because a case can never have a violation comply by date which is greater than the case comply by date itself.
Complied On	Enter a date from the calendar to update the date on which the code violation was complied on.
Last Updated Date	Displays the date on which the code violation details were last updated.
Case Comply By	Displays the comply by date of the case.
Earliest of Comply by Dates in Violations	Displays the earliest date among all the comply by dates that correspond to open code violations for the case.

Page Element	Description
Latest of Comply by Dates in Violations	Displays the latest date among all the comply by dates that correspond to open code violations for the case.
Next Inspection Scheduled For	Displays the date on which the next inspection is scheduled. Whenever the code violation comply by date is set to be greater than the current case comply by date, the system automatically updates the case comply by date as well as the next inspection scheduled for date, based on the time rules set. You can also see this change on the Inspections page. See *Working with Code Enforcement Inspections*. For details on time rules, see *Setting Up Time Rules*.
Rates and Fines section **Rate**	Enter a rate to calculate the fine for a code violation.
Currency	Displays the currency in which the fine is to be calculated.
Frequency	Select the frequency with which the code violation fine is calculated. The available options are Daily, Weekly and Fixed. This decides whether the code violation fine is calculated on a daily or weekly basis or on a fixed rate.
Total Fine	Displays the total fine as per the rates and frequency. This amount is dynamically calculated from the fee schedule with the mapping source as *Code Enforcement Violation Fees*. For details, see *Setting Up Fee Schedules*.
Total Fine Paid	Displays the total fine paid by the responsible party.
Reason section **Reason for Update**	Select a value from the available drop-down list which specifies the reason for your update.
Reason Details	Add a description to give more details regarding the reason for update.

Once the rates and fine are set for a code violation, the system automatically calculates the fine incurred when the code violation extends beyond its comply by date. You can also use the **Calculate Fine** button on the Code

Violation page to manually trigger the calculation of the total fine to be paid by the responsible party. See *Working with Code Enforcement Fees and Payments*.

3. Click **Save** to complete your update.

Adding a One-Time Fee

You can add a one-time fee for a code violation.

To add a one-time fee for a code violation:

1. On the Cases page, click **Case Information** and select **Code Violations** in the left panel to see the list of code violations.
2. On a code violation record, click the three-dot **Actions** menu and select **One-Time Fee**.

Page Element	Description
Fee Item	The identifier of the fee.
Amount (USD)	The amount due for the fee. **Note:** Fee amounts are calculated based on the fee schedule set up on the Issue Subtype page. For more information, see *Setting Up Issue Subtypes*.
Status	Shows the status of the fee payment. ◦ Paid ◦ Processing Payment ◦ Due
Department	The department that calculates the fee amount.
Assessed Date	The date on which the fee was assessed.
Due Date	The date by which the payment must be made.
Comments	Add comments pertaining to this fee item.

3. Click Done to complete adding the one-time fee.

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

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

Planning Applications

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	View comments on your own planning applications that are marked as visible to public. Add, update, and delete comments till the application is closed.	PSC Registered Public User
PSC Registered Public User	View comments on your own planning applications that are marked as visible to public. Add, update, and delete comments till the application is closed.	PSC Registered Public User
PSC Add Comments to Planning and Zoning	Add comments to planning applications that are not closed.	PSC System Administrator PSC Zoning Administrator PSC Planning Assistant PSC Associate Planner PSC Inspections Supervisor PSC Finance Administrator PSC Economic Development Officer PSC Chief Building Officer PSC Cashier PSC Building Inspector PSC Principal Planner PSC Planning Coordinator PSC Plan Reviewer 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

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
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 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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
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.

Working with Code Enforcement Attachments

You view a list of files and upload or download documents associated with a case or incident on the Attachments page.

Attachments provide supporting documentation needed by agency staff while working with cases and incidents. See the section "Security Details for Working with Attachments" for information about setting up security for agency staff, responsible parties, and contacts with access to manage attachments.

You can manage attachments associated with a transaction on different pages in Oracle Permitting and Licensing. Here's a look at some of the areas that include attachment functionality:

- The Attachments page in cases and incidents.
- The Workflow page in the transaction detail pages.
- Inspection Detail and Checklist pages in the Inspector Application for mobile devices.
- New Violation and Inspection pages in Oracle Municipal Code Officer.

For more information about managing attachments for a workflow task, see *Using Workflow in Code Enforcement*.

For more information about Oracle Municipal Code Officer, see *Accessing the Code Officer Application*.

Security Details for Working with Attachments

This section describes important security roles, requirements, or considerations specific to working with attachments for cases and incidents.

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Registered Public User	Add and update attachments to cases until they are closed. View all attachments on applications for which the user is the responsible party.	PSC Registered Public User
PSC Add Case Attachments	Add Case Attachments	PSC System Administrator PSC Code Enforcement Technician PSC Add Case Attachments PSC Code Enforcement Officer PSC Code Enforcement Case Management PSC Code Enforcement Application Administrator PSC Code Enforcement Case Administration PSC Integration Cloud User for Workflow
PSC Update Case Attachments Added by Others and Self	Update Case Attachments Added by Others and Self	PSC System Administrator PSC Update Case Attachments Added by Others and Self PSC Code Enforcement Application Administrator
PSC Update Case Attachments Added by Self	Update case attachments that were added by others and by themselves.	PSC System Administrator PSC Code Enforcement Case Management PSC Code Enforcement Case Administration PSC Code Enforcement Application Administrator PSC Update Case Attachments Added by Self PSC Integration Cloud User for Workflow
PSC Delete Case Attachments Added by Others and Self	Delete Case Attachments Added by Others and Self	PSC System Administrator PSC Delete Case Attachments Added by Others and Self PSC Code Enforcement Application Administrator

Primary Role	Access Description	Associated Job Roles and Abstract Roles

Note: Responsible parties and contacts with case access can view and add attachments to their own cases 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.*

Attachments Page in the Case Details

You can use the Attachments page in the case details as the case's central repository for managing attachments.

The actions you can perform depend on your permissions.

The page tabs and elements may vary on the Attachments page depending on the case. Let's take a look at the different available tabs:

- The **Case** tab displays all case-related attachments uploaded by both responsible parties and agency staff.
- The **Intake** tab displays all the attachments received as part of the incident and case intake processes. It displays all intake-related attachments uploaded by responsible parties, agency staff, as well as any registered and anonymous users.
- The **All** tab displays all the attachments, including those from other sources, such as incident intake, inspections, and appeal and hearing.

Viewing Attachment Details

To view a list of attachments:

1. Access the detail page for the case where you want to view attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.
   You may need to expand the **Case** section that includes the Attachments link.
3. On the Attachment page, view the attachment grids on the different tabs.
   Here are the various elements:

Page Element	Description
File Name	View the following information in the **Filename** field: ◦ Icon indicating the file type ◦ Filename with file type extension
File Size	Displays the file size.

Page Element	Description
Description	View the description of the attachment as entered by the person who added the attachment.
User Type	Displays which type of user had uploaded the attachment.
Source	This column is displayed only for the All tab. It indicates the source from where the attachment was added, such as incident intake, incident inspections, case, case inspections, appeal and hearing etc.
Uploaded By Uploaded On	View the name of the person who uploaded the file along with the date and time when the person uploaded the file. Registered public users see *Staff* instead of a name.
Actions	Click the actions icon to select and perform an action: ◦ *View Details* ◦ *Download* ◦ *Preview* ◦ *Delete*

4. Click the **Sort By** to view attachments grouped by these fields: file name and size,description, user type, uploaded by, and uploaded on.
5. To find a specific attachment, you can enter values in the search field.

Adding Attachments

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

> **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.

To add attachments:

1. Access the detail page for the case where you want to add attachments.
2. Click the **Attachments** link in the left panel to view the Attachments page.

   You may need to expand the section that includes the Attachments link.
3. Click the **Add** icon.
4. Select the file to upload in the browser dialog box and click **Open**.

   The file name appears on the **New attachment** drawer.
5. On the **New attachment** drawer, optionally enter a description of the file.
6. If the **Category** and **Subcategory** fields appear on the Add Attachment page, optionally select a document category and subcategory.
7. Click the **Upload** button.

   The Add Attachment window closes, and the newly uploaded attachment appears on the Attachments page.

Updating Attachment Details

You can update attachments that you added on the Case tab. Agency staff with appropriate permissions can update any attachments on the Case tab.

Note: Attachments on the All tab can't be updated.

Here's how to view and update document details on the Attachment details page:

1. On the Attachments page, click the **Action** icon for the document that you want to view.
2. Select **View Details** to open the **Attachment details** drawer.

   The page includes the information from the **Attachments** page and attachment details, such as file name and size, upload and update details. The drawer also shows the user type and preview of the attachment.
3. On the **Attachment details** drawer, you can update the description.

Downloading Attachments

You can either download a single attachment or select multiple and download them together.

To download a single attachment from the Attachments page:

1. On the **Attachments** page, click the **Action** icon for the document you want to download.
2. Click the **Download** button and save to the location of your choice.

To download multiple selected attachments from the Attachments page:

1. On the **Attachments** page, click the **Select Multiple** icon above the grid.
2. Select the documents to download.
3. Click the **Download** button and save to the location of your choice..

Deleting Attachments

There are multiple ways to delete attachments. The security associated with your user ID determines whether you can delete attachments.

To delete a single attachments from the Attachments page:

1. On the **Attachments** page, click the **Action** icon for the document you want to delete.
2. Select **Delete** from the action menu.

To delete selected attachments from the Attachments page:

1. On the **Attachments** page, click the check box at the top of the grid to select all attachments or select the check boxes for the documents you want to delete.
2. Click the **Delete** button.

Working with Appeals and Hearings

Agency staff can request an appeal on behalf of the responsible party, for a violation, citation or abatement that the responsible party has received. The details of the requested appeals, their hearing schedules, and decisions can be seen in the case details — Appeals and Hearings page.

Registered public users can request appeal for their case as a responsible party, using the Resolve Issue page. Permissions to access the case is issued by the agency staff after the user requests access. For information about registered users requesting access and requesting appeals, see *Resolving Issues*.

Code officers such as a code technician can directly schedule hearings for a case, independent of appeals.

Viewing Appeals and Hearings

1. Select the **Code Technician Worklist** tile on the Agency Springboard and select the Hearings tab. This page lists only the cases that are appealed, with a hearing schedule. Click **View More Details** for the case row you want to access.

   Alternatively, select the **Cases** tile on the Agency Springboard to access the **Appeals and Hearings** page. Click **Appeals and Hearings** in the left panel.
2. The **Appeals and Hearings** page lists all the appeals and hearings for the case:

Page Element	Description
Source	Review the details of the record: ◦ Source – Appeal or Hearing ◦ Responsible Party ◦ Date of creation
Hearing Body	Review the name of the hearing body that is assigned to the case hearing.
Hearing Status	View the status of the hearing: ◦ *Not Scheduled*: The hearing is not scheduled. ◦ *Scheduled*: The hearing is scheduled. ◦ *Completed*: The hearing is completed with a decision outcome.
Hearing Date	Review the date on which the hearing is scheduled.
Hearing Decision	Review the decision taken after a hearing.
Appeal Date	Review the date on which the appeal was made.

<table>
<tr><th>Page Element</th><th>Description</th></tr>
<tr><td>Appellant</td><td>Review the name of the responsible party.</td></tr>
<tr><td>Responsible Party</td><td>Review the name of the responsible party for the case.</td></tr>
<tr><td>Hearing Purpose</td><td>Review the purpose for which the hearing was scheduled.</td></tr>
<tr><td>Actions</td><td>Click to view the actions you can perform on the record, which are based on the status of the case – Hearing or Appeal:
View Details: Select to view the additional appeal and hearing details in a drawer.
View Attachments: Select to open the Attachments drawer and view the list of attachments related to the hearing with the details, such as file name and size, description and upload details.

The Actions menu allows you to view more details, download, or delete attachments.
Note:
You can delete only the attachments uploaded by yourself.
Schedule Hearing: Select to schedule a hearing by selecting a hearing body and an available date.
Reschedule Hearing: Select to change the hearing date.
Update Hearing Decision: Select to enter the decision made in the hearing and add corrective actions.
Cancel: Click to cancel the appeal or hearing.</td></tr>
</table>

3. You can view additional hearing and appeal details by selecting the *View Details* option from the Actions menu.

Page Element	Description
Source	Identifies the source of the details in the drawer as either Appeal or Hearing.
Creation Date	Date on which the Appeal or Hearing was created.
Hearing details Hearing Body	The name of the hearing body that is assigned to the case hearing.
Hearing Date	The date on which the hearing is scheduled.
Hearing Purpose	The purpose for which the hearing is scheduled.
Responsible Party	The name of the responsible party for the case.

Page Element	Description
Hearing Decision	The decision made on a previous hearing.
Decision Date	The date on which a hearing decision was made.
New Compliance Due Date	The date by which the responsible party must ensure compliance.
Apply Updated Compliance Date to All Open Code Violations	View the status of this switch for the appeal or hearing. **Note:** You cannot turn this switch on or off from this page.
Comments	View any comments regarding the appeal or hearing.
Last Updated By	The name of the person who last updated the appeal or hearing details.
Last Updated Date	The date on which the last update to the appeal or hearing was made.
Appeal Details Appellant	The name of the responsible party.
Appeal Date	The date on which the appeal was made.
Appeal By	The date by which an appeal has to be made.
Appeal Reason	The reason for requesting an appeal.

Adding an Appeal

You can request an appeal only if there is no active appeal for the case. The time period within which you can request an appeal is determined by your administrator and is set up in the Time Rules page. For more information about time rules, see *Setting Up Time Rules*.

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page, select **Appeals and Hearings** in the left panel to open the list of appeals and hearings.

3. Click the **Add Appeal** button. The New Appeal drawer opens.

Page Element	Description
Appeal Source	Identifies the source of the appeal.
Appellant	View the name of the responsible party.
Appeal Date	View the appeal date, which is the current date.
Case Status	Select the case status for the appeal from the list of available statuses. The list of transaction statuses along with each of its associated system status are set up by your administrator. See *Setting Up Transaction Statuses*.
Appeal Reason	Enter the reason for requesting the appeal.

4. Click **Save**. The new appeal for the case is created with a case status of Appeal, and any scheduled inspection is canceled.

Adding a Hearing

You can directly schedule a hearing for a case, without an appeal request. To add a hearing:

1. Access the Appeals and Hearings page.
2. Click the **Add Hearing** button to open the **New hearing** drawer.

Page Element	Description
Appeal Source	View the source of the appeal, which is Hearing.
Hearing Body	Select the hearing body from the available list.
Hearing Date	Select a hearing date from the available options, which is determined by the schedules of the hearing body and the agency.
Hearing Purpose	Select a purpose for adding this hearing.
Case Status	Select the case status for the hearing from the list of available statuses. The list of transaction statuses along with each of its associated system status are set up by your administrator. See *Setting Up Transaction Statuses*.

Page Element	Description
Appellant	View the name of the responsible party related to the case.

3. Click **Save**. The new hearing for the case is scheduled with a case status of *Hearing*, and any scheduled inspection is now available for reschedule on the Inspections page. If there is no scheduled inspection, then the **Schedule Hearing** button is available. For details, see *Working with Code Enforcement Inspections*.

   After adding a hearing, from the Actions menu, you can select:
   - Manage Attachments option to add any attachments related to this hearing.
   - Reschedule Hearing option to select a new date for the hearing.
   - Update Hearing Decision option to make changes to a hearing decision.

The **Reschedule** option is also available on the:

- Code Technician Worklist: On the Hearings tab, select Reschedule from the **Actions** menu.
- Code Officer Worklist: On the Hearings tab, select Reschedule from the **Actions** menu.

Updating Hearing Decision

After the public hearing is completed and the hearing body announces their decision, the assigned code technician updates the decision in the case details using the Appeals and Hearings page.

1. Select the **Code Technician Worklist** tile on the Agency Springboard and click the Cases tab.

   Select the **Code Technician Worklist** tile on the Agency Springboard and select the Hearings tab. This page lists only the cases that are appealed, with a hearing schedule. Click **Actions** and select **Update Hearing Decision**.

   You can also navigate using the case list. Select **Cases** on the Agency Springboard to view a list of all cases. On the Cases page, select **Appeals and Hearings** in the left panel to open the list of appeals and hearings.
2. Click the **Actions** button on the row of the appeal or hearing you are working with and click **Update Hearing Decision**.

   Note: This option is not available for a completed appeal row.

3. Enter the decision-related information on the Hearing Decision drawer:

Page Element	Description
Hearing Body	View the name of the hearing body assigned for the hearing.
Hearing Purpose	View the purpose for which the hearing is held.
Hearing Date	Select an available date for the hearing.
Responsible Party	View the name of the responsible party for the case.

Page Element	Description
Hearing Decision	Select the hearing decision from options set up by your administrator. Examples of decision options can be *Compliance*, *Not in Compliance*, *Continue*, *No Outcome*, and others. If you select the option related to noncompliance, you must change the status of the case in the **New Case Status** field.
Decision Date	Enter the date on which the hearing decision was taken.
New Case Status	Select the new status for the case from the list of available statuses. Depending on the status you select, the workflow stages and their tasks are accordingly updated. The list of transaction statuses along with each of its associated system status are set up by your administrator. See *Setting Up Transaction Statuses*. **Note:** The **Update Status** option is available only if your agency has enabled the **Available to Manually Select as New Status** option on the Transaction Status page. If the option is disabled, the case status changes are triggered only by the code enforcement workflow.
Issue New Notice of Violation	Turn on the switch to issue a new notice for violation, when violation is selected as the new case status.
Case Comply By	Displays the original date by which the responsible party must ensure compliance.
New Compliance Due Date	Select a date by which the responsible party must ensure compliance. This option appears if the new status of the case is violation, citation or abatement.
Apply Updated Compliance Date to All Open Code Violations	Turn on the switch to apply the new case compliance due date to all open code violations for the case.
New Citation Due Date	Select a date by which the responsible party must pay the citation fee. This option appears if the new status of the case is citation.
Comments	Enter any text for reference.

Page Element	Description
Code Violations	View the code violations associated with the hearing. Expand each section to view its description and the corrective action. Click the three-dot action menu to view details in a drawer.

4. Click **Save** to close the Hearing Decision drawer and show the updated records on the Appeals and Hearings page. Depending on the options selected, the status of the case changes and the workflow stages and their tasks are updated. See *Using Workflow in Code Enforcement*.

   Also, an inspection is scheduled as needed, a citation record is created, and a notice is sent to the responsible party. See *Working with Code Enforcement Inspections*, *Working with Notices*, and *Working with Citations*.

Adding Responsible Parties

Agency staff add and manage responsible parties related to a case.

Viewing Responsible Parties

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

   Alternatively, you can select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the row to go to the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.

   You can also view the already existing responsible parties from the **Responsible Parties** section on the Case overview page.

Page Element	Description
Responsible Party	View the name of the party responsible for the reported violation.
Primary	Indicates that the person is the primary responsible party.
Mailing Address	View the address of the responsible party. You can view the location of the address on a map at the top of the page.
Email	View the email address of the responsible party.
Phone	View the phone number of the responsible party.
Status	Shows the status of the responsible party – *Active* or *Inactive*.

Page Element	Description
Type	View the type of the responsible party. For example, owner.
Online Access Status	Displays the status of the online access that was requested by the responsible party: ◦ *Not Requested* ◦ *Pending Approval* ◦ *Issued* ◦ *Denied*
Actions	Select from these options: ◦ *Allow Access* ◦ *Deny Access* ◦ *Inactivate*: Access to the case is removed and a communication is sent to the responsible party. The person will not be included in the notice process. The Access options are available only if a responsible party has requested access to this case. Also, once approved, the **Actions** menu shows only the *Deny* and *Inactivate* options. Similarly, after denying the access, the **Actions** menu shows only the *Approve* and *Inactivate* options. Once the access is issued, the responsible party can access their case details using the Resolve Issue page and take actions such as submitting appeals. See *Resolving Issues*. **Note:** The Access actions are also available to the assigned code technician on the **Access Requests** tab in the Code Technician Worklist.

4. To view more information about the responsible party record, click View Details option from the Actions menu. The Responsible Party Details drawer also gives the date on which the record was created and when it was last updated. If applicable, the detail page shows information about the access request, such as, the name of the person who approved or denied the access request, the date, and any comments.

Managing Online Access Requests

The **Online Access Requests** section on the Responsible Parties page lists all the responsible parties who have requested access to the case. You can approve or deny the access for each request or drill down to the request details.

To approve an access request, click the **Actions** menu on the record and select Approve Access. On the Approve Access page you select one of the options:

- Link the request to an existing responsible party: Use the checkbox to select a responsible party from the list identified by the agency and click **Save**. The existing responsible party row detail is updated with the email address as per the access request and the online access status changes to *Access Allowed*. The Online Access section shows the details.

- Create a new responsible party: Select the checkbox and click **Save**. The Add Responsible Party page opens for you to enter the details and save. A new record is added to the Responsible Party grid, with the online access status as *Access Allowed*.

To deny an access request, click the **Actions** menu on the record and select Deny Access. The record is removed from the Online Access Requests grid and a new record is added to the Responsible Parties grid with online access status as Access Denied. To approve the request, you can use the Actions menu on the row and select Approve Request.

Once the request is approved or denied, the record is removed from the Online Access Requests grid.

> **Note:** Approved and inactive responsible parties are not listed in the Approve Access page.

Adding Responsible Parties

1. Select the **Code Technician Worklist** tile on the Agency Springboard and then select the Cases tab.
2. On the Cases page, click a row to go to the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
4. Click the **Add** button. On the **Create new responsible party** drawer, you can add a new responsible party by entering the details or you can click the **Select from List** to search and select an existing record.
5. Enter a value for the **Type** field.
6. Select the **Primary** switch if you want to assign the newly added responsible party as the primary responsible party. Such an assignment will automatically update the earlier primary responsible party as not primary.
7. Click **Save** to add the responsible party and return to the list page, which always lists the primary responsible party with a **Primary** badge.

New responsible parties are active by default. You can set a responsible party as inactive by using the **Inactivate** option available in the **Actions** menu in each record. Inactive responsible parties are not included in the notices and they will not have access to the case.

Updating Responsible Party Detail

1. Select the **Code Technician Worklist** tile on the Agency Springboard and then select the Cases tab.
2. On the Cases page, click a row to go to the case you are working with.
3. Click **Responsible Parties** in the left panel to view the Responsible Parties page for the case.
4. Click the **View Details** button on the responsible party row to update the details.
5. On the **Responsible Party Details** page, enter new values for the fields you want to change.
6. Turn off the **Active** switch if you want to set the responsible party as inactive.
7. The Online Access section appears only if there is an access request from the responsible party, which is pending approval, approved, or denied. You can approve or deny the access depending on the status of the request.
8. Click **Save** to save the changes and return to the Responsible Parties page.

Working with Citations

A code enforcement officer issues a citation as a result of inspection related to a code violation. Citations can also be issued by agency staff such as a code technician using the Citations page in case details. A fee amount associated with each citation record is created, the details of which are listed in the Fees and Payments page.

Viewing Citations

You view a list of all citations issued for a case on the Citations page.

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page click a case row, or click the **View Details** option from the **Actions** menu for the case row you want to access.
3. Click **Citations** in the left panel to open the list of citations.

Page Element	Description
Citation ID	View the identifier of the citation.
Description	View the description of the citation as entered at the time of issuing the citation.
Due Date	View the due date for paying the citation fee.
Created By	View the name of the agency staff who created the case.
Code Violations	View the number of code violations related to the case.
Comments	View comments entered at the time of creating the case.

4. Click a citation record if you want to open the **Citation Details** drawer and viewthe related citation fees.

Issuing a Citation

Agency staff such as a code technician can issue a citation for a case using the Citations page.

1. Select the **Cases** tile on the Agency Springboard.
2. On the Cases page click a case row, or click the **View Details** option from the **Actions** menu for the case row you want to access.
3. Click the **Add** button to open the New Citation drawer and enter values for the fields:

Page Element	Description
Overview, **Compliance Date**	Enter the date by which the responsible party must ensure compliance.
Description	Enter a description about the citation.
Due Date	Enter the due date by which the citation fee must be paid.

Page Element	Description
Comments	Enter any optional comments related to the citation.

4. The **Code Violations** section lists only those applied code violations that are in open status. Expand a record to view its details and the corrective action.
5. Click **Add**. The **Citations** page now shows the new record.

Once a citation is issued, a corresponding citation fee amount is calculated and the fee record is created in the **Fees and Payments** page. Fee amounts are calculated based on the fee schedule set up on the Issue Subtype page. For details, see *Setting Up Issue Subtypes* .

Once a citation is issued, the corresponding citation fee items are listed in the **Fees and Payments** page, along with the fee amount. The distribution of fee items and the associated fee for each item are determined by the fee items and schedules set up. For details, see *Setting Up Fee Items* and *Setting Up Issue Subtypes*

For details about a code enforcement officer issuing citation using a mobile device, see *Accessing the Code Officer Application* .

Working with Code Enforcement Fees and Payments

You view and manage code enforcement fees and payments associated with a case on the Fees and Payments page in the case details.

Viewing Fees and Making Payments for a Case

The Fee and Payments page from the case details shows the details of the payments due for the case. Separate fee items are listed based on the source and type of the applicable fees. Payable amounts can include fees for case status changes such as for violation, citation, or any other case status changes.

The distribution of fee items and the associated fee for each item are determined by the fee items and schedules set up. For details, see *Setting Up Fee Items* and *Setting Up Issue Subtypes*.

You use the **Pay** button to open the **Pay Fees** drawer and make the payment.

> **Tip:** You can also make a payment for a case or citation from the agency springboard by selecting the *Make CE Payments* option in the **I want to** field. Registered public users can make payments for a case or citation using the CE Payments tile on their landing page.

The attributes on the case details – Fees and Payments page are updated once the payment is successful.

To view the fee details for a case and make payment:

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the row for the case you want to access.
3. Click **Fees and Payments** in the left panel.
4. On the Fees and Payments page, view a list of total code enforcement fees, such as *Total Fees*, *Total Payable*, *Total Payments in Process*, *Total Paid* and *Balance Due*. You can also view the detailed list of separate fee items in the grid below.

A **Pay** button is displayed, when you have fee items due for payment. Use the **Pay** button to pay either all the balance amount which is due or pay only a particular fee item.

Page Element	Description
Total Fees, **Total Payable**, **Total Payments in Process**, **Total Paid**, **Balance Due**, and **Pay** button	The top section on the page displays the consolidated details for all the fee items displayed in the grid below. Use the **Pay** button to open the Pay Fees drawer and pay the total balance due or pay for selected fee items.
Calculate Late Fee button	When there are overdue fee items, a late fee is associated with them, which the responsible party must pay. Click to open the **Calculate late fees** drawer, and calculate late fees for fee items, if any.
Fee Source	Shows the source from which the fee item was generated. For example, case status change, citation, and late fee. Click the fee source link, if available. to access the **View Details** drawer.
Fee Item	The identifier of the fee. Click the fee item link to access the **Fee item details** drawer.
Fee Record ID	The unique identifier of the fee record generated for each fee item. The values are generated based on the fee autonumber rule set up on the Code Enforcement Options page. **Note:** The fee record ID for a late fee will remain the same as the value generated for the fee item it is applied on. See *Setting Up Agency-Level Options for Code Enforcement*.
Total Amount	The amount due for the fee. **Note:** Fee amounts are calculated based on the fee schedule set up on the Issue Subtype page. For more information, see *Setting Up Issue Subtypes*.
Late Fees	Displays the late fees applicable for the fee item row, if any.
Status	Shows the status of the fee payment as a badge:

Page Element	Description
	◦ *Paid* ◦ *Processing payment* ◦ *Due*
Currency	The currency in which the fees are paid.
Due Date	The date by which the payment must be made.
Assessed Date	The date on which the fee was assessed.
Payment Reference ID	The identifier of the payment.

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

Viewing Fee Item Details

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the case row you want to access.
3. Click **Fees and Payments** in the left panel.
4. On the Fees and Payments page, click the fee item link for which you want to view the details.
5. On the **Fee item details** drawer, view additional information about the fees, such as fee department, and comments about the fee item. You can edit to make changes to the fields for fee amount, status, department, assessed and due dates, as well as enter comments.
   If the fee item has any late fees associated with it, you can see the details in the **Late Fee Details** section.

> **Note:** Code technicians can make citation payments on behalf of the responsible party by using the **I want to — Pay Citation** option on the Agency springboard.

Adding an Ad Hoc Fee Item

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the case row you want to access.
3. Click **Fees and Payments** in the left panel.
4. On the Fees and Payments page, click **Add** (+ button) to add an ad hoc fee item.

Page Element	Description
Fee Item	Search and select a fee item.

Page Element	Description
	If a **Fee Item** is associated with a department, then the **Department** field gets automatically populated when you select the fee item.
Amount (USD)	Enter the amount for the ad hoc fee.
Status	◦ **Canceled** ◦ **Due** ◦ **Suspended** ◦ **Pending** (Default selection) Fee items with a status of *Pending* are not added in **Balance Due** in the Fees and Payments page. ◦ **Paid**
Department	The department that calculates the fee amount.
Assessed Date	The date on which the fee was assessed. **Note:** The Assessed Date always displays the date on which the system had last assessed the fee. Hence, whenever the complied on date for a code violation is updated to a previous date, the fee needs to be recalculated. See the Calculating Fines for Code Violations section below for details.
Due Date	The date by which the payment must be made.
Comments	Add comments pertaining to this fee item.

5. Click **Save** to save the changes.

Paying Code Enforcement Fees

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the case row you want to access.
3. Click **Fees and Payments** in the left panel.
4. Click the **Pay** button to access the **Pay Fees** drawer. Select the check boxes of the fee items you want to pay for.

   > **Note:** When overdue fee items are present, the late fees for these are automatically calculated as you click the **Pay** button and the total amount to be paid is shown.

5. Click **Proceed to Pay**.

6. Depending upon the agency's payment integration setup, various modes of payment are available, such as Credit Card, Debit Card, or Cash. Choose the payment method and click the **Continue** button to access the Checkout page.
7. Review the Checkout page, which shows the different secured payment methods available.

   > **Note:** Only agency staff can process cash and check payments.

8. Select one of the payment methods for payment processing and click **Make Payment**.

   Depending on the payment service being used, the payment steps differ.

   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.
9. In the Fees and Payments page, **Payment Reference IDs** are generated for the paid fee items. Click the link to view a receipt with details, such as receipt number and date, reference number, amount paid, item details, and payment method.

Calculating Late Fees

1. Select the **Cases** tile on the Agency Springboard to view all the cases in the system.
2. On the Cases page, click the row for the case you want to access.
3. Click **Fees and Payments** in the left panel.
4. Click **Calculate Late Fee** at the top of the grid.
5. The **Calculate late fee** drawer lists only the overdue fee items. Select the fee items for which you want to calculate the late fees.
6. Click **Submit** to return to the **Fees and Payments** page. The page now lists the late fee as a separate record with the same **Fee Reference ID** and its associated fee.

Working with Related Transactions

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

Transaction Linking

As agency staff you can establish relationships between transactions and then perform actions such as viewing the related transaction applications, marking them as a primary, subapplication, or linked application. You can also remove links between related transactions.

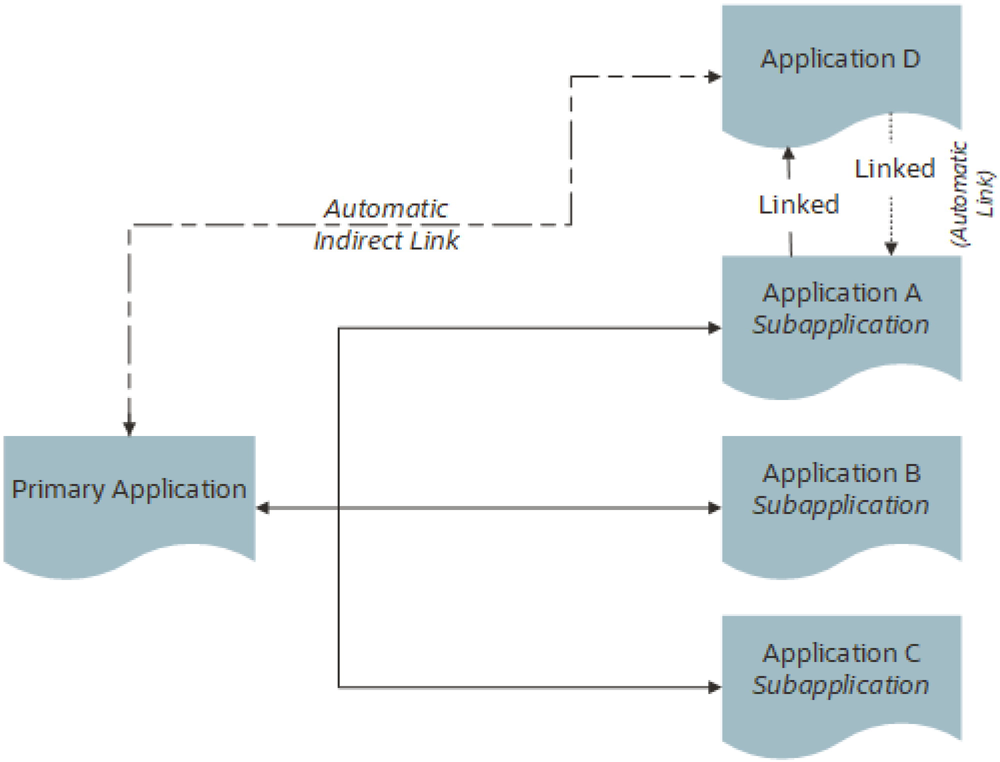
Agency staff can establish links between transactions and code enforcement cases as well. Only agency staff such as a code technician have access to the Case – Related Transactions page and are allowed to drill down to the case detail from other transactions. Public users don't have access to related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

When you link one transaction with another manually, you can select the type of relation between them, which can be Primary, Subapplication, or Linked. The relation type you choose to link your application determines the relation type the linked application will have with the source application.

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

As a result of the linking, an indirect link is automatically created between your current transaction application and the applications that are directly linked to your linked application.

The following diagram shows the related transactions linking for a selected application:



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

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

Security Details for Working with Related Transactions

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

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Manage Related Transactions	Manage related transactions.	PSC Agency Staff - All agency users PSC System Administrator
PSC Registered Public users	Manage related transactions. Access is also dependent on the related transactions configuration in agency setup.	PSC Registered Public users

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

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

Working with the Related Transactions Page

The Related Transactions page lists all the transactions linked to the selected application including those transactions that are in turn linked to the transaction you have linked.

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

Viewing Related Transactions

Access the Related Transactions page.

Page Element	Description
Search	Use the search control to filter the list of related transactions with a "begins with" keyword search. For example, if you want to confirm a planning application has been linked, enter *planning*.
Filter buttons	Select the filter option to list the applications linked by the types: • **All** - All related transactions in the list. • **Primary** - For permits, planning applications, and business license applications. • **Subapplication** - For permits, planning applications, and business license applications. • **Linked** - For permits, planning applications, business license applications, and cases. This option displays the count of applications for each type in parentheses.
Link Applications and **Link Cases**	Click the **Link Applications** button to link a business license, permit, or planning application to the current application. Click the **Link Cases** button to establish links between transactions and code enforcement cases.
Include Indirects or **Exclude Indirects**	Only available when the application has an indirect relationship with another application. Click **Include Indirects** to display the indirectly linked applications for each application record. Indirectly linked applications aren't included in the list by default. Click **Exclude Indirects** to hide the indirectly linked applications for each application record.
View > **View Relations**	Click to view a diagram representing the relationship between the transactions. Indirectly linked applications must be marked as linked to appear in the diagram. **Note:** Indirectly linked applications must be displayed in the list to appear in the diagram. Click the **Include Indirects** button before you view the link relationship diagram.
Transaction ID	View the identifier of the linked transaction and a link to access the application detail.

Page Element	Description
	Note: The detail link is available only for agency staff. Public users accessing this page for their transaction can only view the identifier of the application or case. They can't drill down to the detail page.
Transaction Type	The transaction types are created in the Intake Form Designer by the agency, so they will reflect the transaction type name set for the intake form for that application. For example, a transaction type for a permit may be *Residential Solar*, and a transaction type for code enforcement may be *Unsafe Structure*.
Classification	Shows the classification of the transaction, such as Permit, Case, Planning application, and so on.
Link Type	The type of link in the context of the transaction opened on the transaction details page. For example, values may be *Subapplication, Linked, Indirect*, and so on.
Transaction Status	The current status of the transaction or case, such as *Pending, Submitted, Inspection, Violation,* and so on.
Description	The description as entered for the application by the applicant on the intake form, such as *Kitchen Remodel* or *Carl's Auto Business License*.
Transaction Updated Date	The date on which the transaction was last updated.
Linked By and **Linked On**	The name of the person who linked the transaction, and the date on which it was linked.
Conditions of Approval	When a transaction has conditions of approval applied to it, this column displays a **View** link. Click the link to view details.
••• **Actions**	Depending on the type of related transaction, you can select from these options: • Mark a transaction as a subapplication or linked. • Remove the link between applications. • Apply conditions of approval to permits. For more information, see "Performing Actions on Related Transactions" in this topic.

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*.

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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:
   - **Add as Linked**
   - **Add as Primary** - For permits and cases only.
   - **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
Primary	• Mark as Linked • Remove Application Link
Subapplication	• Mark as Linked • Remove Application Link
Linked	• Mark as Primary Available only if there is no primary permit linked to the application. • Mark as Subapplication • Remove Application Link
Indirect	• Mark as Primary Available only if there is no primary permit linked to the application. • Mark as Subapplication • Mark as Linked

11 Recording and Billing Time

Security Details for Recording and Billing Time

This topic describes important security roles, requirements, or considerations specific to recording and billing time, including assessing fees for time entries on a transaction.

Permit application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Assess fees Time Recording on Permits for All	Assess time recording on permits assigned to all.	PSC Inspections Supervisor PSC Chief Building Officer PSC Planning Coordinator PSC Permits Supervisor PSC Permits Application Administrator PSC System Administrator
PSC Assess fees Time Recording on Permits for self	Assess time recording on permits assigned to themselves.	PSC Permit Technician
PSC Permit Time Recording Inquiry	View time recording on permits.	PSC Agency Staff - All Agency users
PSC Permit Time Recording Management All	Manage time recording on permits assigned to all.	PSC Inspections Supervisor PSC Chief Building Officer PSC Principal Planner PSC Planning Coordinator PSC Permits Supervisor PSC System Administrator
PSC Permit Time Recording Management Self	Manage time recording on permits assigned to themselves.	PSC Building Inspector PSC Plan Reviewer PSC Permit Technician

Planning application

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Assess fees Time Recording on Planning applications for All	Assess time recording on planning applications assigned to all.	PSC Zoning Administrator PSC Principal Planner
PSC Assess fees Time Recording on Planning applications for self	Assess time recording on planning applications assigned to themselves.	PSC Planning Assistant PSC Associate Planner
PSC Planning Time Recording Inquiry	View time recording on planning applications.	PSC Agency Staff - All agency users
PSC Planning Time Recording Management All	Manage time recording on planning applications assigned to all.	PSC Zoning Administrator PSC Principal Planner PSC Planning Assistant PSC Associate Planner PSC Plan Reviewer

Code enforcement

Primary Role	Access Description	Associated Job Roles and Abstract Roles
PSC Case Time Recording Management assigned to self	Allows users to manage case time recordings assigned to themselves.	PSC Code Enforcement Application Administrator PSC System Administrator PSC Code Enforcement Officer PSC Code Enforcement Technician
PSC Case Time Recording Management for All	Allows users to manage case time recordings assigned to all.	PSC Code Enforcement Application Administrator PSC System Administrator

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

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

Adding Time Entries

Agency staff can record the time that they spend working on transactions for the purposes of billing and reporting.

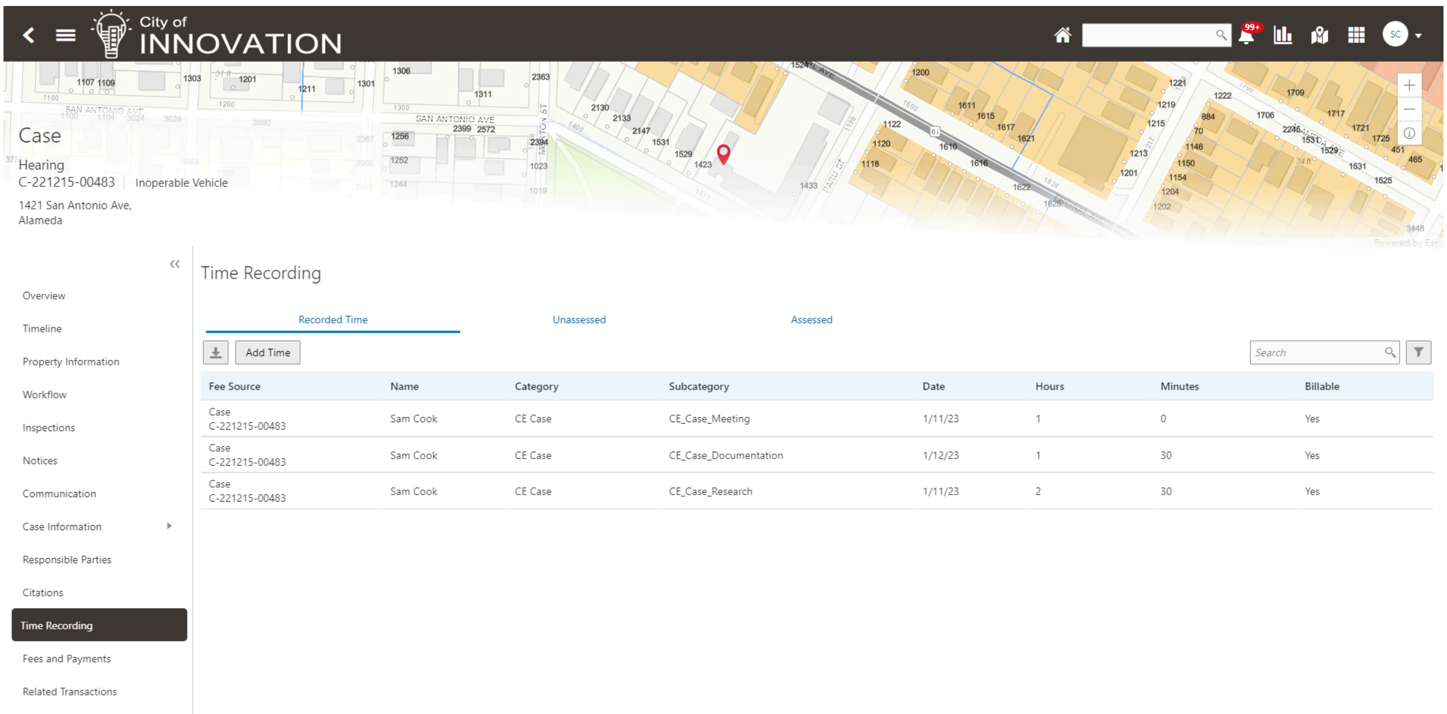
Tip: You can access time entry on a mobile device as well as on a laptop or desktop computer. The layout and some functionality changes based on the device you are using.

For more information about working with time entries associated with permits, see *Viewing Recorded Time for an Application*.

Accessing Time Entry

You add time entries directly on the respective pages for the transaction you are working on.

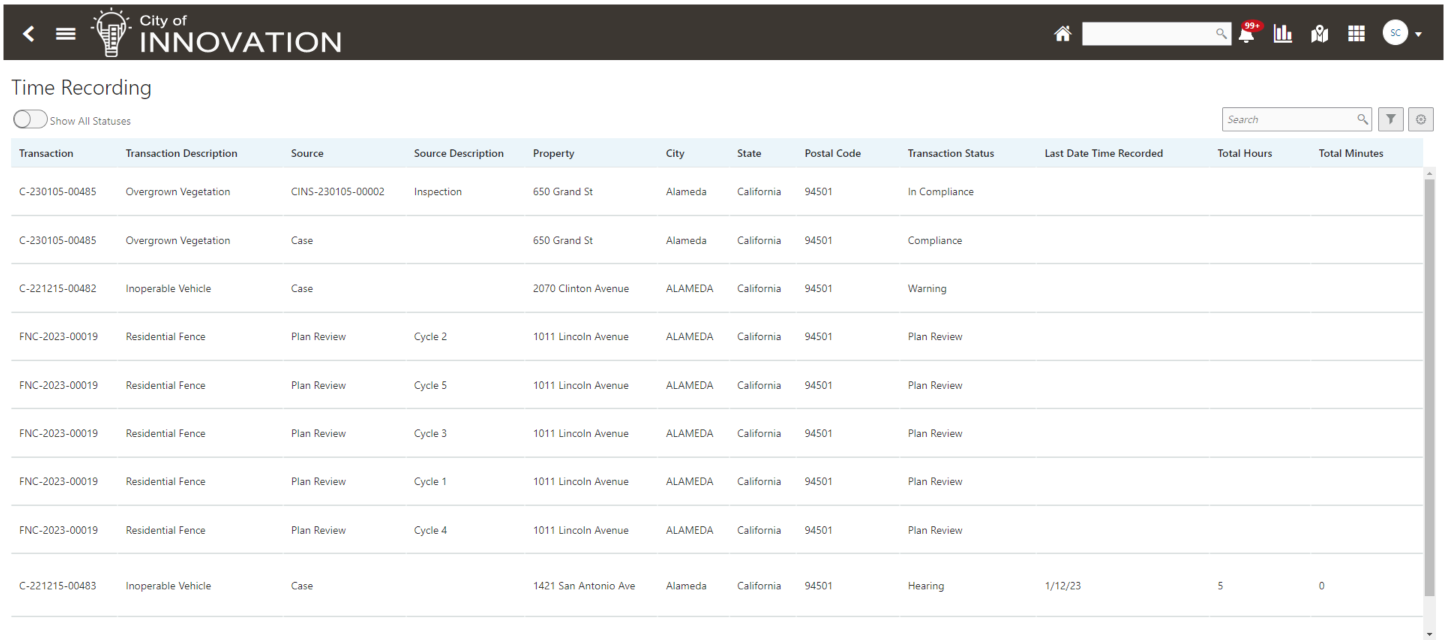
This is an example of a Time Recording page in the case details



For information about entering time spent working on a permit inspection using the Time Recording page in the Inspector Application for mobile devices, see *Reporting Inspection Time*.

Additionally, you can quickly access transactions using the **Time Recording** tile on the Agency Springboard. This page displays transactions that you are assigned to or for which you have already recorded time.

This is an example of a Time Recording page accessed from the agency springboard



By default, this page displays permit and planning transactions that aren't in a terminal status (Completed, Denied, Certificate of Occupancy, Void, or Withdrawn). For example, it won't display expired permit inspections or completed plan review cycles. Turn on the **Show All Statuses** switch to show all transactions assigned to you regardless of status.

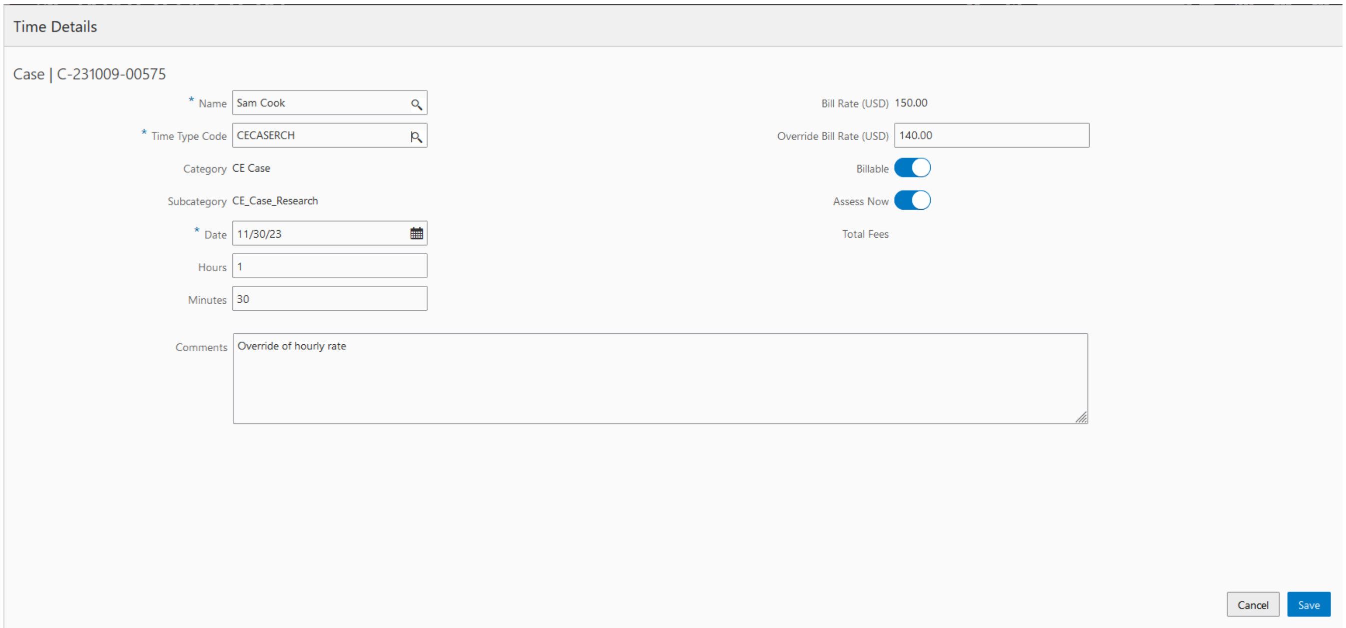
Click a row to access the transaction page where you can enter your time. You must have appropriate permissions to add time entries.

Adding a Time Entry

1. Access the transaction that you want to add time for.

2. Click **Add Time**.

   This example illustrates the Time Details page for a case


Time Details
Case | C-231009-00575
* Name
Sam Cook
* Time Type Code
CECASERCH
Category
CE Case
Subcategory
CE_Case_Research
* Date
11/30/23
Hours
1
Minutes
30
Bill Rate (USD)
150.00
Override Bill Rate (USD)
140.00
Billable
Assess Now
Total Fees
Comments
Override of hourly rate
Cancel
Save

3. On the Time Details page, enter values for the following fields:

Page Element	Description
Name	Enter the agency user name of the person performing the task. Staff who have the ability to enter time for others, such as billing supervisors, can select any agency staff member in this field. All other agency staff automatically have their name populated in this field and can't change it.
Time Type Code	Enter the time entry type code that you want to use. The page displays the category and subcategory associated with the code that you select in the **Category** and **Subcategory** fields, respectively. The time entry type code also determines the default values of the **Billable** and **Assess Now** switches on this page and whether those default values can be changed. For more information on time entry types, see *Setting Up Time Entry Types*.
Date	Select the date that you're entering time for. The current date is the default value.
Hours and **Minutes**	Enter the amount of time you spent on the transaction in hours and minutes. You can select 0 to 23 in the **Hours** field and 0 to 59 in the **Minutes** field.
Bill Rate	Displays the bill rate in USD associated with job title in the user profile of the agency staff. For more information, see *Defining Job Titles*.
Override Bill Rate	Enter an amount in USD that overrides the default bill rate in fee calculations. Only agency staff with time recording management roles have permission to override the job title bill rate in the time details.
Billable	Use this switch to indicate whether the time is billable. Whether this switch is turned on by default or can be overridden is determined by the time entry type that you select.
Assess Now	Use this switch to indicate whether the fees associated with this time entry are assessed immediately when you save it. **Note:** This switch appears only for staff who have the ability to enter time for others. It is disabled when the **Billable** switch is turned off.
Total Fees	Displays the fees associated with the time entry, whenever applicable.
Comments	Enter any additional information you want to record for the time entry.

Page Element	Description

4. Click **Save**.

Modifying a Time Entry

Note: Agency staff with permission to assess fees can modify or delete a time entry until the fees associated with it have been paid. They can add or update comments for a time entry until its associated transaction reaches terminal status such as *Completed* or *Denied*. Staff without permission to assess fees can't modify or delete a time entry once fees have been assessed for it.

1. Click a time entry row.
2. On the Time Details page you can:
   - Edit the time entry fields.
   - Delete the time entry. You will be prompted to confirm the permanent deletion.
3. Click **Save**.

Assessing Fees for Time Entries

Agencies can bill for time spent by their staff working on transactions.

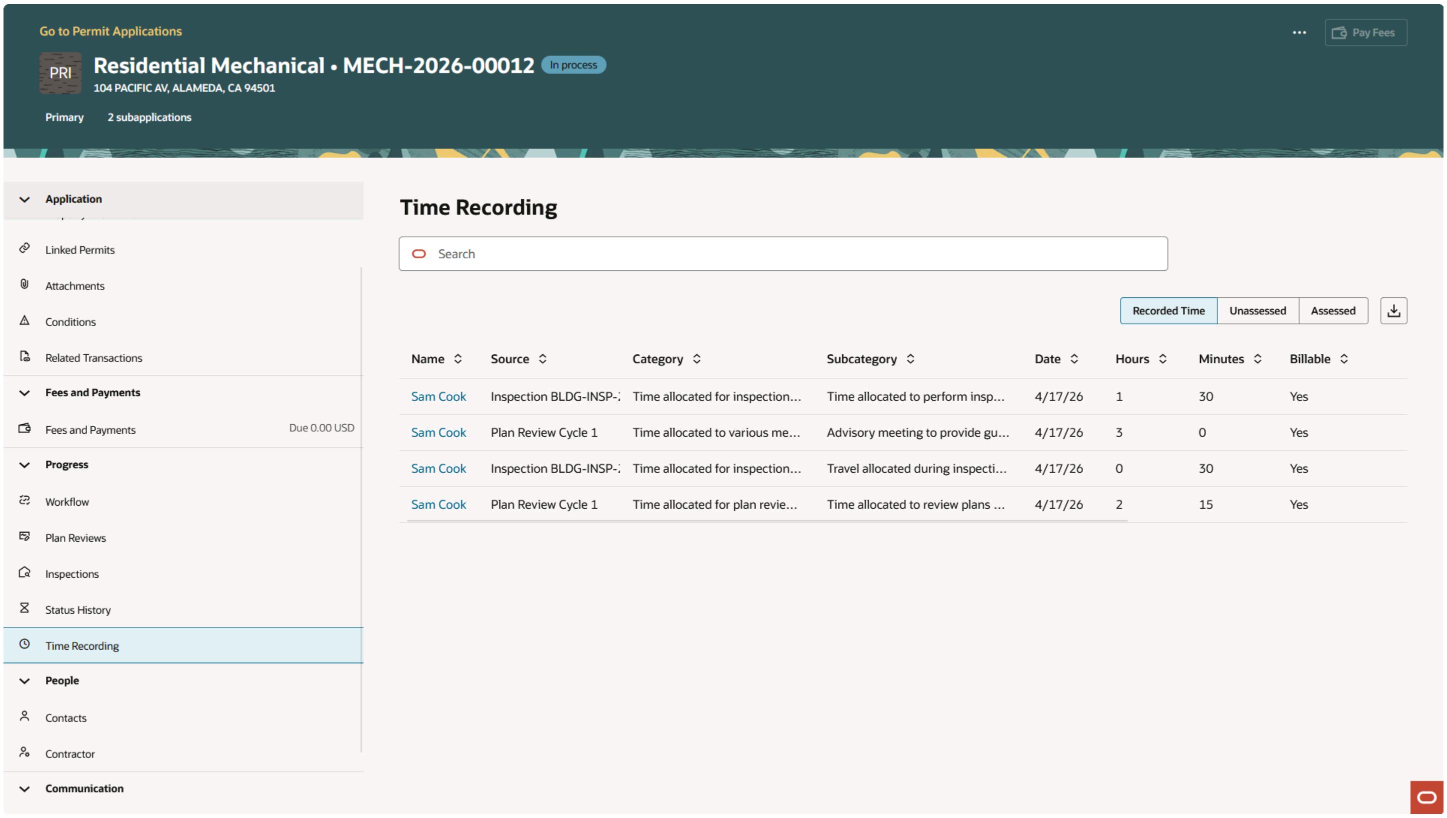
Fees are automatically calculated when time is recorded. Agencies can charge at different hourly rates by setting up bill rates for each job title for use in fee formulas. Each staff person has one job title in their user profile and the associated bill rate appears when recording time. Agency staff with time recording management roles have permission to override the job title bill rate in the time details.

For more information about permissions and security, see *Security Details for Recording and Billing Time*.

Time entries with the **Assess Now** switch turned on are immediately assessed when they're saved and appear in the Fees and Payments page for the transaction. If the switch is turned off, an agency staff member must assess the fee explicitly.

You assess fees on the Time Recording page for a transaction.

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


Go to Permit Applications
Pay Fees
PRI
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
Search
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.

12 Working with Accounting

Generating Accounting Transactions and Journal Entries

Depending on the accounting framework implemented by your agency, you use accounting batch processing to generate subledger accounting events or accounting transactions and journal entries from source transactions such as payments and refunds.

Subledger accounting events are created if the offering-level Accounting Framework Option is *Financials Cloud Subledger Accounting*. For more information, see *Selecting an Accounting Framework*.

Before you run the Generate Accounting process, set up accounting event definitions and accounting rules. Processing includes only source transactions with active accounting event definitions to create subledger accounting events or accounting transactions and journal entries. For more information, see *Managing Accounting Events* and *Setting Up Accounting Rules*.

> **Note:** You must enable accounting event definitions for the FeeReceipts and FeeRefunds events to process source transactions in Code Enforcement. These events must also be enabled to support overpayments and payments made with multiple payment methods.

> **Note:** If the source transaction is a cash reconciliation adjustment, accounting transactions are created at the time the reconciliation adjustment is made. However, batch processing is required to generate the resulting journal entries. If journal entries aren't created, verify that the ReconAdjustment event definition is enabled.

The transaction status of accounting transactions that are created without journals is *Created*. The status of accounting transactions after journal entries are generated is *Generated*. The Generate Accounting process groups accounting transactions into journals based on the combination of ledger, accounting date, accounting event, and accounting rule.

You set up and run batch processing on the Generate Accounting page, which you can access by selecting **Accounting** > **Generate Accounting**.

Entering Generate Accounting Process Parameters

1. Access the Parameters tab on the Generate Accounting page.
2. Use the **Date From** and **Date To** fields to process source transactions such as payments or refunds made during the date range that require accounting. The system configuration determines which source transactions will be processed.

The payment or refund accounting date is based on the next available date in the accounting calendar. You can review the accounting details after processing on the Accounting Transactions page. For more information, see *Viewing Accounting Transactions*.

Scheduling the Process

1. Access the Schedule tab.

2. To immediately add the process to the queue, select the **As soon as possible** option.
3. To create a schedule for the process, select the **Using a schedule** option, and enter values using the following fields:

Page Element	Description
Frequency	Select how frequently you want to run the process. Values are: ◦ *Once:* Select to run the process one time only. ◦ *Hourly or minute:* Select to run the process at regular time intervals. ◦ *Daily:* Select to run the process at regular intervals in days. ◦ *Weekly:* Select to run the process at regular intervals in weeks. ◦ *Monthly:* Select to run the process on specific days of the month. ◦ *Yearly:* Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing.
Hours and **Minutes**	Enter the time interval between scheduled processes. For example, if you enter *2* in the **Hours** field and *30* in the **Minutes** field, the process will run every 2 hours and 30 minutes beginning on the specified start date. **Note:** These fields are available only if you select a process frequency of *Hourly or minute*.
Days	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. **Note:** This field is available only if you select a process frequency of *Daily*.
Weeks	Enter the number of weeks between scheduled processes. For example, if you enter *6*, the process will run every 6 weeks beginning on the specified start date. **Note:** This field is available only if you select a process frequency of *Weekly*.

Page Element	Description
By day	Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the **Second**and **Wednesday** options, the process will run on the second Wednesday of every month. 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. **Note:** This option and its associated fields are available only if you select a process frequency of *Monthly* or *Yearly*.
By date	Select this option to run the process on specific dates of the month. You can select more than one date. **Note:** This option and its associated fields are available only if you select a process frequency of *Monthly* or *Yearly*.
Month	Select the months in which you want your process to run. **Note:** This option and its associated fields are available only if you select a process frequency of *Yearly*.

Setting Up Process Notifications

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

1. Turn on the **Notify Me When This Process Ends** switch to send yourself a notification when the process finishes.
2. Access Notification tab.
3. Click **Add**.

4. On the Create Notification page, enter the email address of the person you want to receive notifications.

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

   - On success
   - On error
   - On warning

   You can remove any of these process notification conditions.
5. Click **OK** to save the notification recipient.
6. (Optional) To delete a notification recipient, select the recipient in the Notification tab and click **Delete**.

Submitting the Process

Once you've entered your process parameters, scheduling information, and notification recipients, you're ready to submit the process. Enter any additional information in the **Submission Notes** field and click **Submit**. Click **Process Monitor** to check the status of your process.

Viewing Accounting Transactions

You can view accounting transactions on the Accounting Transactions page.

This page displays the fee items for agency transactions that require accounting journals. Each fee item row displays the transaction ID of the transaction from which it originated and the name of the source table that contains the detail for that transaction. These accounting transactions are processed by the Generate Accounting process.

Viewing Accounting Transactions

1. Select **Accounting** > **Accounting Transactions**, or click **Accounting Transactions** on the Agency Springboard.
2. Select an accounting transaction on the Accounting Transactions page to view additional information about the transaction.

   Each accounting transaction has one of the following statuses:

   - *Created:* The Generate Accounting process couldn't create a journal for the accounting transaction because there is no applicable accounting rule.
   - *Generated:* The Generate Accounting process created a journal for the accounting transaction.

   For accounting transactions with a status of *Generated*, the **Journal** grid displays information about the journal entry associated with it including the Journal ID, Accounting Event, and Journal Status. For more information on journal entries, see *Reviewing Journal Entries*.

   The **Accounting Transaction Errors** grid displays any error messages associated with the accounting transaction. These errors must be corrected before a journal can be created for the transaction.

Reviewing Journal Entries

You view and edit journal entries on the Journal page.

Journals contain debit and credit accounting entries created by the Generate Accounting process for the accounting transactions that it processes. You can export journals that do not contain errors to an Enterprise Resource Planning (ERP) system.

Viewing Journal Entries

Select **Accounting** > **Journal**, or click **Journal** on the Agency Springboard.

The grid on the Journal page displays all of your journal entries and their current status by the accounting date. Valid journal entry statuses are:

- *Created:* Indicates that the journal has been created but not validated.
- *Error:* Indicates that the journal has one or more validation errors.
- *Valid:* Indicates that the journal has been validated and is ready to be exported.
- *Sent:* Indicates that the journal has been exported to a file that can be used to update an ERP system.

Reviewing Accounting Lines

1. Select **Accounting** > **Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. In the Lines tab of the Journal Details page, select an accounting line.
4. On the details page, you can update the following accounting fields:
    - **Account**
    - **Division**
    - **Department**
    - **Fund**
    - **Function**
    - **Program**
5. Click **Save**.
6. On the Journal Details page, click **Validate** to ensure that the accounting lines are still valid after the changes you made.

Viewing Journal Entry Errors

1. Select **Accounting** > **Journal**, or click **Journal** on the Agency Springboard.
2. Select a journal entry on the Journal page.
3. Access the Header Errors tab to view any header errors for the accounting line.
4. Access the Line Errors tab to view any line errors for the accounting line.

    You can correct these errors on the Lines tab. Once you correct and validate a line error, it no longer appears on the Line Errors tab.

Exporting Journal Entries

You create a file containing accounting transactions that can be imported into an Enterprise Resource Planning (ERP) system.

When a *Publish Accounting* integration is enabled for your agency, the Export Journals to ERP process publishes accounting information to OIC where it can be transformed and imported by third-party applications. For more information, see *Setting Up Agency Integrations*.

> **Note:** If you use Oracle Financials Cloud as your ERP system, we recommend using the Financials Cloud Subledger Accounting feature to enable ERP accounting integration instead of using the Export Journals to ERP process.

You run the process that exports journal entries on the Export Journals to ERP page, which you can access by selecting **Accounting** > **Export Journals**.

Entering Export Journals to ERP Process Parameters

Access the Parameters tab on the Export Journals to ERP page and enter values using the following fields:

Page Element	Description
Mapping Name	Select the Data Format Exchange mapping that you want to use to generate the file. For more information on the Data Format Exchange utility, see *Setting Up Data Format Exchange Maps*.
All Open Periods	Select to include journals for all open accounting periods.
Specify Dates	Select to include journals for a specific accounting date range.
Accounting Date From and **Accounting Date To**	Specify the range of accounting dates for which you are exporting journal entries.
Select Ledgers	Select the ledgers for which you want to export journal entries.

Scheduling the Process

1. Access the Schedule tab.
2. To immediately add the process to the queue, select the **As soon as possible** option.
3. To create a schedule for the process, select the **Using a schedule** option, and enter values using the following fields:

Page Element	Description
Frequency	Select how frequently you want to run the process. Values are:

Page Element	Description
	◦ *Once:* Select to run the process one time only. ◦ *Hourly or minute:* Select to run the process at regular time intervals. ◦ *Daily:* Select to run the process at regular intervals in days. ◦ *Weekly:* Select to run the process at regular intervals in weeks. ◦ *Monthly:* Select to run the process on specific days of the month. ◦ *Yearly:* Select to run the process during specific months.
Start Date	Enter the date on which you want to begin your scheduled processing.
End Date	Enter the date on which you want to end your scheduling processing.
Hours and **Minutes**	Enter the time interval between scheduled processes. For example, if you enter *2* in the **Hours** field and *30* in the **Minutes** field, the process will run every 2 hours and 30 minutes beginning on the specified start date. **Note:** These fields are available only if you select a process frequency of *Hourly or minute*.
Days	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. **Note:** This field is available only if you select a process frequency of *Daily*.
Weeks	Enter the number of weeks between scheduled processes. For example, if you enter *6*, the process will run every 6 weeks beginning on the specified start date. **Note:** This field is available only if you select a process frequency of *Weekly*.
By day	Select this option to run the process on specific days of the month irrespective of the date. For example, if you select the **Second**and **Wednesday** options, the process will run on the second Wednesday of every month. 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.

Page Element	Description
	Note: This option and its associated fields are available only if you select a process frequency of *Monthly* or *Yearly*.
By date	Select this option to run the process on specific dates of the month. You can select more than one date. **Note:** This option and its associated fields are available only if you select a process frequency of *Monthly* or *Yearly*.
Month	Select the months in which you want your process to run. **Note:** This option and its associated fields are available only if you select a process frequency of *Yearly*.

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*.

13 Working with Maps

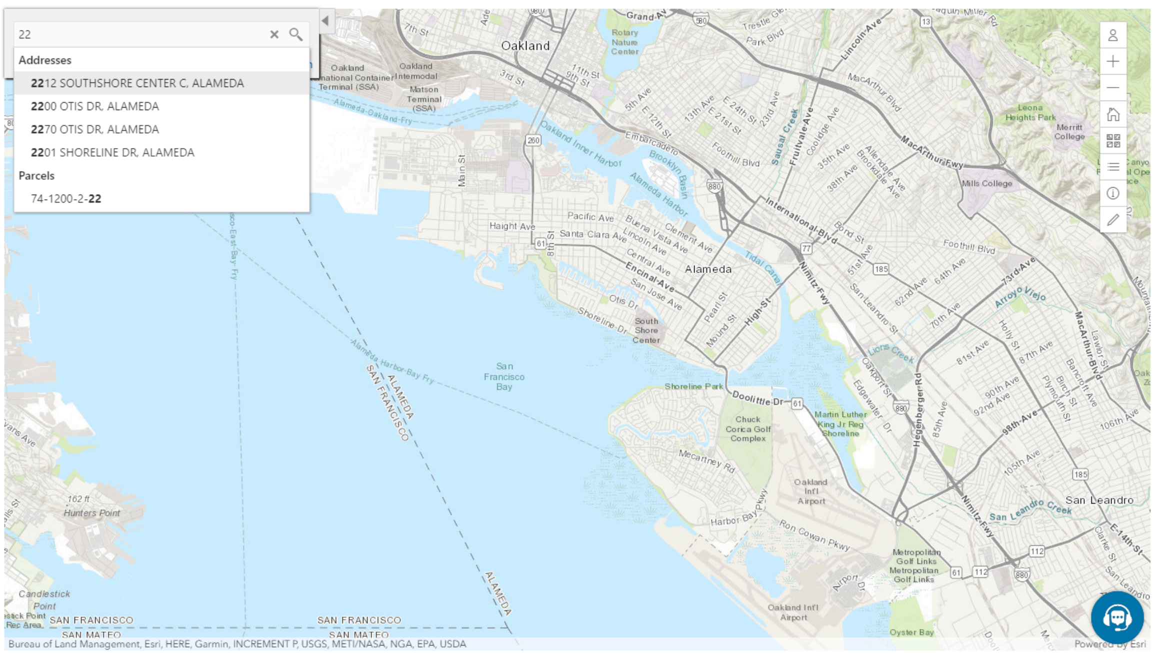
Overview of Delivered Maps

Maps provide a convenient way for agency staff and public users to see and interact with geographical information. For example, maps can show the locations of parcels and addresses as well as the locations of transactions such as permits, planning applications, projects, incidents, cases, and business license activity.

> **Note:** Map functionality relies on integration with a third-party map service such as Esri Geographic Information Systems (GIS) and configuration in Oracle Permitting and Licensing. For more information, see the *Implementing Your Cloud Integrations* guide.

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 **Main Map** in the drop-down menu that appears.	• View existing applications and projects. • Search and select properties. • View transactions for a selected property. • Start new applications for selected properties. • Access an interactive guide for selecting application types.
Guest/anonymous user map	Anonymous public users	Guest users click the **Explore Your City** tile on the landing page.	• View existing applications and projects. • Search and select properties. • View transactions for a selected property. • Access an interactive guide for selecting application types. An anonymous user who attempts to start an application is required to register or sign in first.
Registered public user map	Registered public users	Registered public users click the **Explore Your City** tile on the landing page.	• View existing applications and projects. • Search and select properties. • View transactions for a selected property, and filter transactions so that only the user's own items appear on the map. • Start new applications for selected properties. • Access an interactive guide for selecting application types.

Additional Maps for Applications

This table lists additional maps that support applications:

Map Name	Users	Navigation	Usage
Application intake	Agency staff Registered public users	Access the **Property** section of a new or submitted application, then click the **Map View** icon.	Choose properties and other GIS objects to associate with the application. See *Working with Property Information* when viewing maps

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 *Performing Inspections on the Inspector Application*.
Public notification	Agency staff	• Click the Map icon in the page header, then click **Public Notification** in the drop-down menu that appears. • From the Planning Application detail page, select a hearing where the schedule is final, then select the **Actions** button and choose **Generate Notifications** from the menu that appears.	Create a notification zone by specifying a distance from selected parcels. After creating a notification zone, download.csv files with parcel, address, and owner information for all parcels that are at least partially within the zone. See *Creating Map-Based Public Notification Lists*.

Maps for Code Enforcement

This table lists additional maps that support code enforcement:

Map Name	Users	Navigation	Description
Agency - code enforcement	Agency staff	On the Code Technician Worklist page, go to a tab for managing incidents and then click the **Map View** icon.	View the locations of incidents that appear on the selected worklist tab. See *Using the Code Technician Worklist*.
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 *Reporting Issues*.
Mobile code enforcement inspections	Agency staff	When reporting a new violation, click the **Location of the incident** option.	Identify the location of a violation that is being reported by an inspector who is using the mobile inspection application. See *Accessing the Code Officer Application*.

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*.

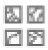
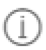
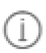
Using the Map Toolbar

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 **Enable Zoom** switch on the map profile.	Use these tools to zoom in or out. You can also double-click a map location to zoom in.
	Show Default Map View	Use the **Enable Default Map View** switch on the map profile.	Click to restore the map to its default (home) display area.

Image	Name	Configuration	Description
	Select Base Map	Use the **Enable Base Map Gallery** switch on the map profile.	Click to display a pop-up window for selecting a map type such as *Streets* or *Topographic.*
	Select Layers	Use the **Enable Map Layers** switch on the map profile.	Click to display a pop-up menu for changing the visibility of various map layers. Examples of layers include the parcel layer and address layer provided by the map service. Click the **Sketch** button to show or hide sketches that have been drawn on the map.
	Show Attribution (for maps in page headers)	This toolbar button is not configurable. Some maps have this button, while other maps, such as Explore Your City, display attribution information across the bottom of the map page.	Click to display a pop-up window that identifies the third-party map sources.
	Identify GIS Information (for maps that are not in page headers)	This tool appears if the **Enable Map Layers** switch is on and the map service URL for the profile is configured to allow the display of object details on the map.	Click to enable the display of object details for map objects (such as parcels) that you click. Details appear in a pop-up window. To stop displaying object details, click the button again to turn off the option to identify GIS information. The map profile settings for **Enable Window Detail Docking** and **Detail Window Dock Position** control where the object detail window appears. However, on mobile devices, the detail window always appears at the bottom of the screen..
	Show Selection Tools or Hide Selection Tools	Use the **Enable Selection Tools** switch on the map profile.	Click to show or hide a toolbar with drawing tools. Use the drawing tools to select parcels on the map using a point, polyline, or polygon.
	Show Sketch Tools or Hide Sketch Tools	Use the **Show Sketch** switch on the map profile to enable the sketch widget.	Click to show or hide a toolbar with sketch tools. Use the sketch tools to draw a point, polyline, polygon, rectangle, or circle. See "Drawing on Maps" in this topic.
	Export Map to File	Enter a print service URL on the GIS Attribute Mapping page or on the map profile. Use the **Show Print** switch on the map profile to enable the print widget.	Click to open the **Export** dialog box to print the displayed map to a file. See "Printing Maps" in this topic.

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 inake 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.

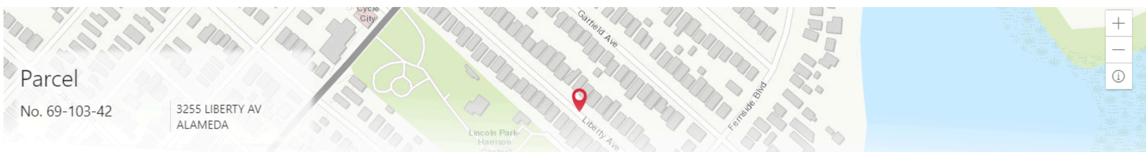
Viewing Map Markers

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.

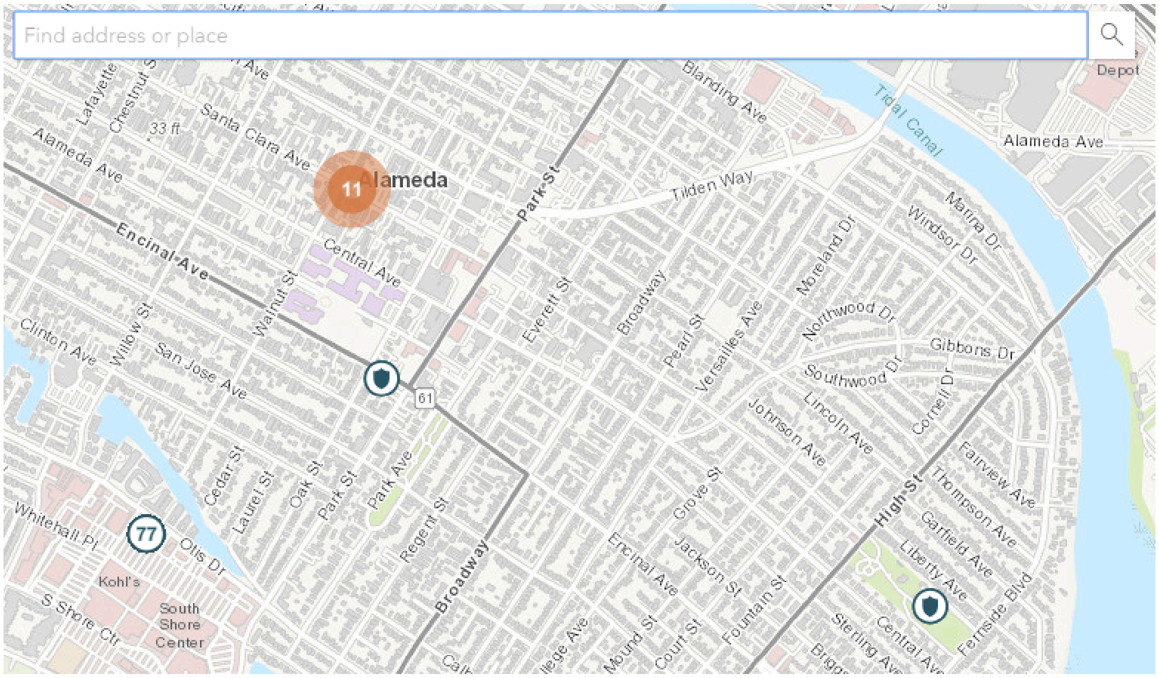


Other Map Markers

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:

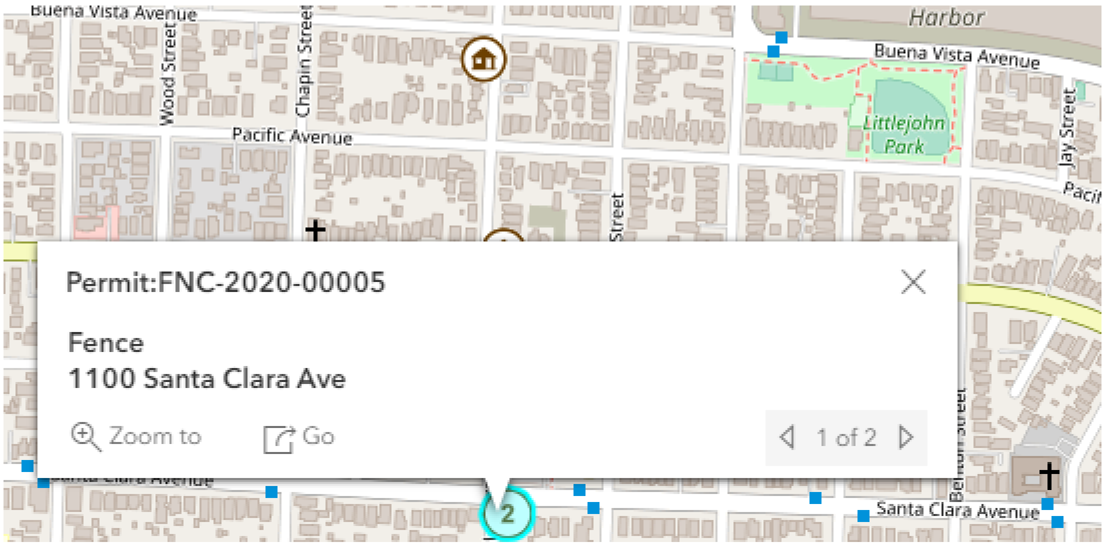
Map Marker	Description
	The location has a single code enforcement issue.
	The location has a single permit application.
	The location has a single planning application.
	The location has a single project.
	The location has a single business license.
	There are multiple transactions at the same location. 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.

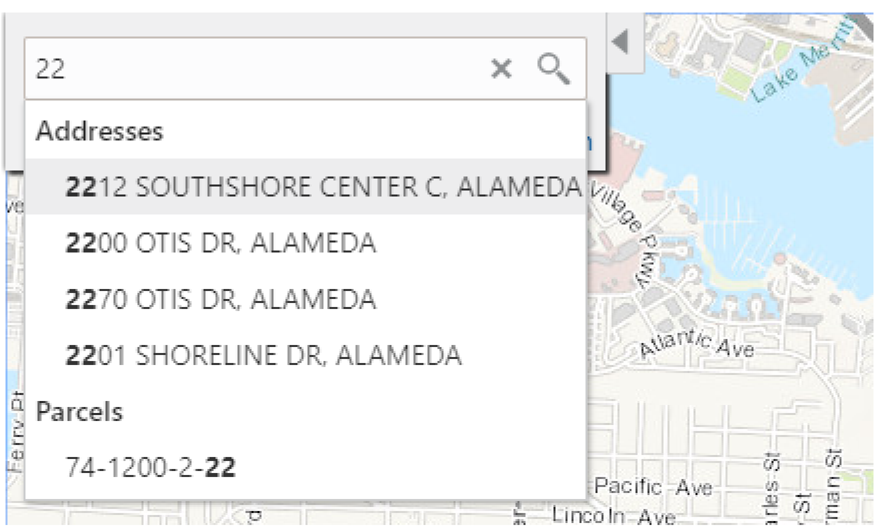
  All users can search for transaction locations. Registered public users have the additional ability to filter search results so that only the user's own transactions appear.

  > **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*.

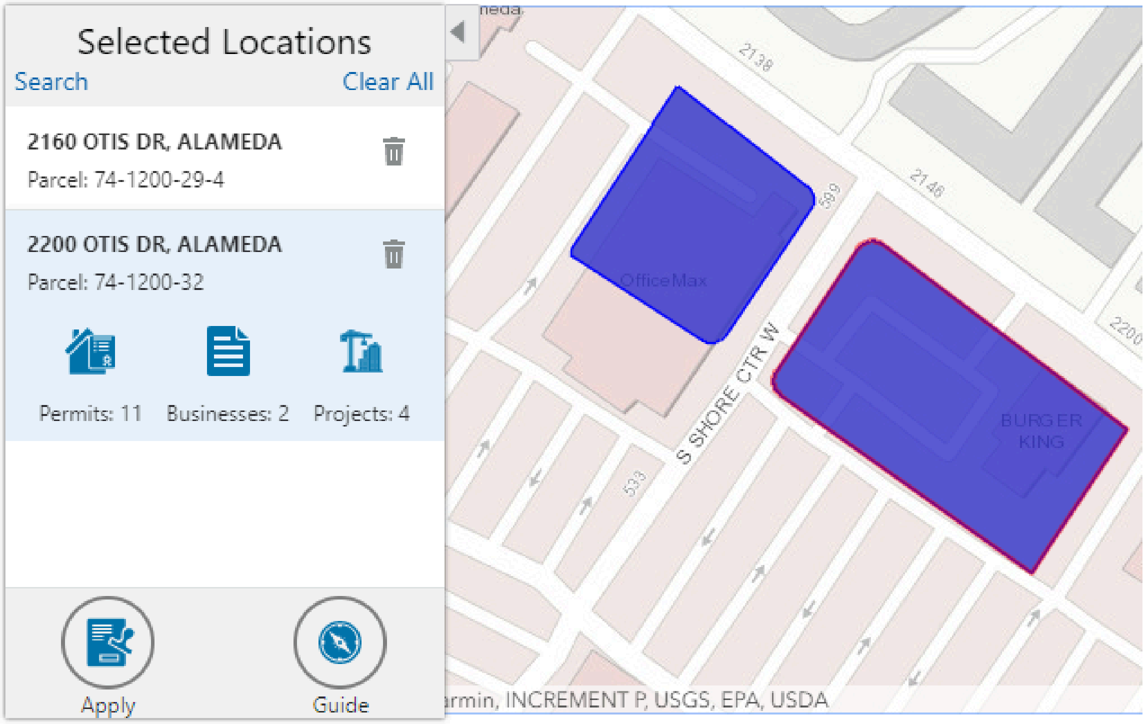
> **Note:** To provide different types of users with the most appropriate interface, there are separate main maps for agency users, registered public users, and anonymous public users. These maps can have different map profiles, giving you control over whether various map options are available to each 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
Delete	Click this icon to remove a single particular property from the list. The icon appears next to each selected property.
Clear All	Click this link to deselect all properties. The link appears at the top of the list.

Selecting Properties Using the Selection Toolbar

To select properties directly from the map, without searching, use the drawing tools. You can use the search and the drawing tools together to add properties to (and remove properties from) your list.

To select and deselect properties using drawing tools:

1. Click the **Show Selection Tools** button on the map's general toolbar.

   The drawing toolbar appears.
2. Use these tools to make your property selection:

Selection Toolbar Button	Description
Draw a Point	Click one or more points on the map to select the properties that contain the points.
Draw a Polyline	Click two or more points on a map to draw a multi-segment line (a polyline) connecting the points that you click. Double-click on the final point to stop drawing. All properties that intersect the resulting polyline are selected.
Draw a Polygon	Click three or more points on a map to draw a polygon. The system redraws the polygon after each click. Double-click on the final point to stop drawing. All properties that are at least partially within the resulting polygon are selected.
Deselect One	Click a selected property to deselect it. **Note:** Selecting a property does not deselect previously selected properties. You must use the Deselect One or the Deselect All tool to remove properties from your selection.

Selection Toolbar Button	Description
Deselect All	Click this button to deselect all properties.
Close	Click to close the toolbar.

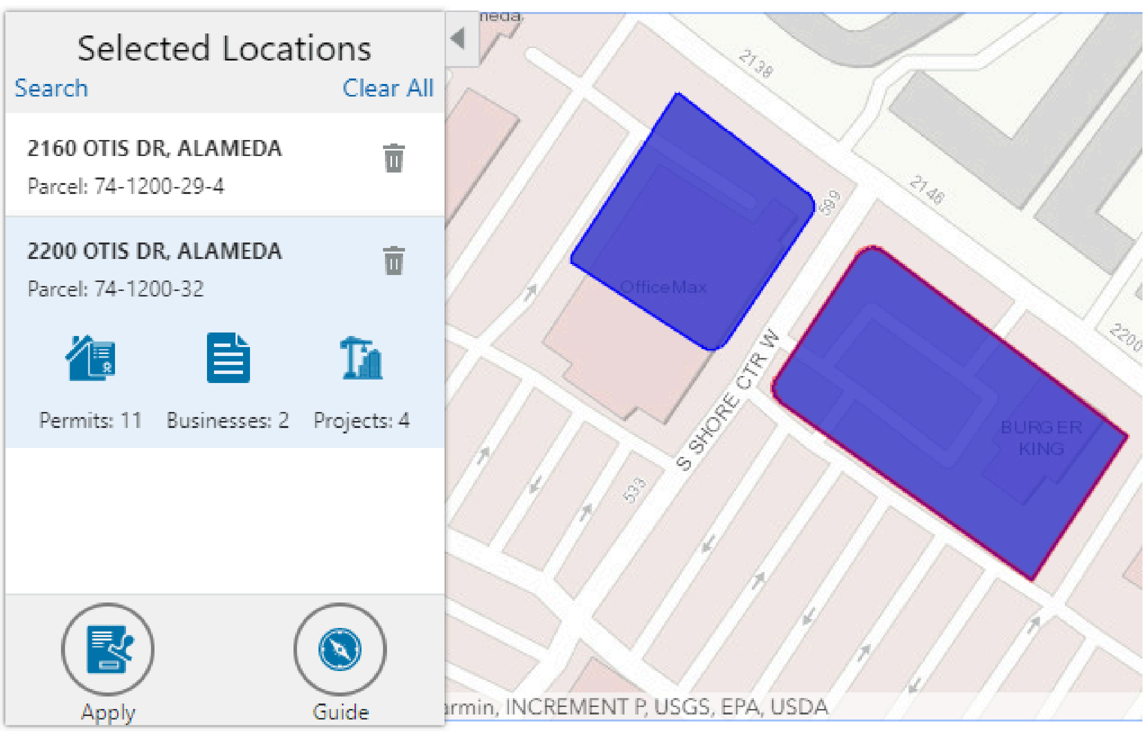
3. Review details of your selections on the Selected Locations list.

   The Selected Locations list replaces the search window whenever properties are selected. This is a single list that also includes properties that you adding using the search.

Using the Selected Locations List

The Selected Locations overlay enables you to review information about selected properties and the transactions that are associated with those properties.

In this example of the Selected Locations list, the addresses and parcel numbers of selected locations are links to the corresponding detail pages. These links are only present for agency staff. When public users see the Selected Locations overlay, the addresses and parcel numbers appear as plain text.



To use the Selected Locations overlay:

1. Review the information cards for the selected locations.

   Each selected property appears on a card. The card title is the primary address for the location. The parcel number, if any, appears below this address. Agency staff can access the detail pages for selected addresses and parcels by clicking the address or the parcel number link on the card. Public users do not have access to detail information, so for public users, the addresses and parcel numbers are plain text instead of links.

   > **Note:** If an address has multiple parcels, each parcel appears on a separate card and all parcels are selected on the map. If a parcel has multiple addresses, a link below the parcel number indicates the number of addresses. Click the link to see a list of addresses.

2. Click a card to select it and learn more about the property.

   If the selected property is associated with any applications or projects, the selected card expands and displays icons for any associated transactions. There are separate icons for **Permits**, **Planning Applications**, **Businesses** (business licenses), **Cases**, **Incidents** and **Projects**. The icon label includes a count of the related transactions.

   > **Note:** If the selected property has an associated business license that is marked to be hidden, then the icon label will not include it in its count.

   If the property 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).

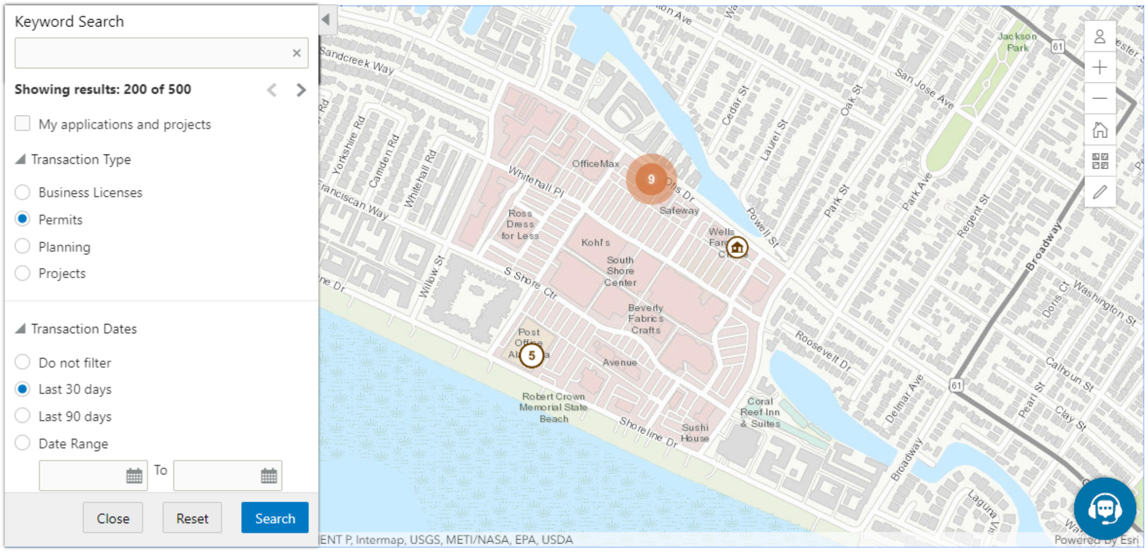
   The Apply page appears so you can select an application type and start an application. As long as the application intake form includes a Property section, the property information will be prepopulated based on the selected properties.

   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.**

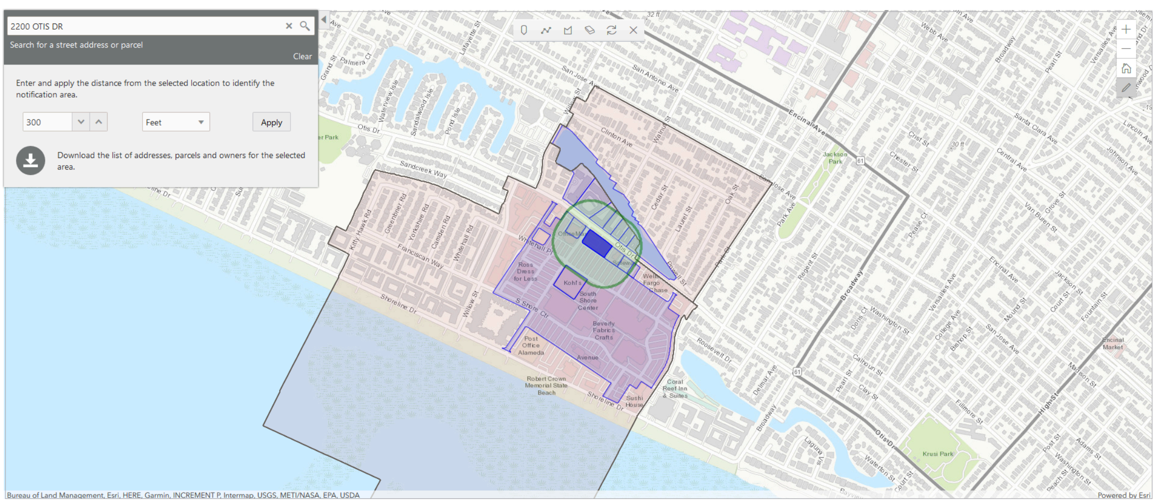
Creating Map-Based Public Notification Lists

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.

Public Notification



To define a notification area and generate notification lists:

1. Access the Public Notification page.

   To access the page from the global header, click the Maps icon, then click **Public Notification** in the drop-down menu.

   You can also access the page directly from the list of hearings for a planning application. If the hearing schedule is final, the action menu for the hearing includes the **Generate Notifications List** action. This action opens the Generate Notifications List window, which contains the Public Notification page. For more information, see *Generating a Hearing Notifications List*.
2. Select a property, or confirm the default property selection.

If you access the Public Notification page from a hearing for a planning application, the property or properties from the planning application are selected by default.

The two methods for selecting properties are:

- Use the search field to search by street address or parcel number, then click the desired property in the type-ahead list or the search results.
- Click the Show Selection Tools icon on the main map toolbar:

  Use the selection tools such as **Draw Point, Draw Polyline,** or **Draw a Polygon** to select properties.

For detailed information on using the selection tools, see *Using the Main Map and Explore Your City Map*.

3. Define the notification area by entering a buffer distance surrounding the selected properties.

   The fields for defining the notification area appear below the search field when a property is selected.

   Enter a number and select a unit of distance for the buffer area: *Feet, Miles, Meters,* or *Kilometers*.

   The fields for entering the distance appear below the search field as long as at least one property is selected.
4. Click **Apply.**

   The notification area appears on the map. Visually, it appears as a bold green outline that follows the contours of the selected property at the specified buffer distance. If you selected multiple properties, there can be multiple notification areas. Parcels that are fully or partially within the notification area appear with a blue outline so you can see which parcels are included in the notification list. If the map is enabled to show neighborhood groups that are fully or partially within the notification area, they appear as a pink layer with a black outline.
5. To change the notification area, modify the property selection, the buffer distance for the boundary, or both, and then click **Apply** again.
6. To clear the property selection and the notification area, click either the **Deselect All** tool or the **Clear** link on the Search overlay.
7. Turn on the **Modify Selection** switch to use the selection tools to manually add parcels outside of the notification area or remove parcels from the notification area.

   The selection outline around the parcel appears when you add a parcel or is removed when you deselect a parcel.
8. When you are satisfied with the notification area, click the **Download** button that becomes visible after you apply a selection.

   Three files are downloaded: *Address.csv, Owner.csv,* and *Parcel.csv.* If the map is enabled to show neighborhood groups that are fully or partially within the notification area, a fourth file is downloaded: *Neighborhood Group Mapping.csv.*

   Files are saved to default folder defined in your browser settings. Your browser must be able to download multiple files.
9. Save the CSV files so your agency can use them to generate notifications.

   The notification process is not part of the Oracle system.

14 Working with Reports

Generating Reports

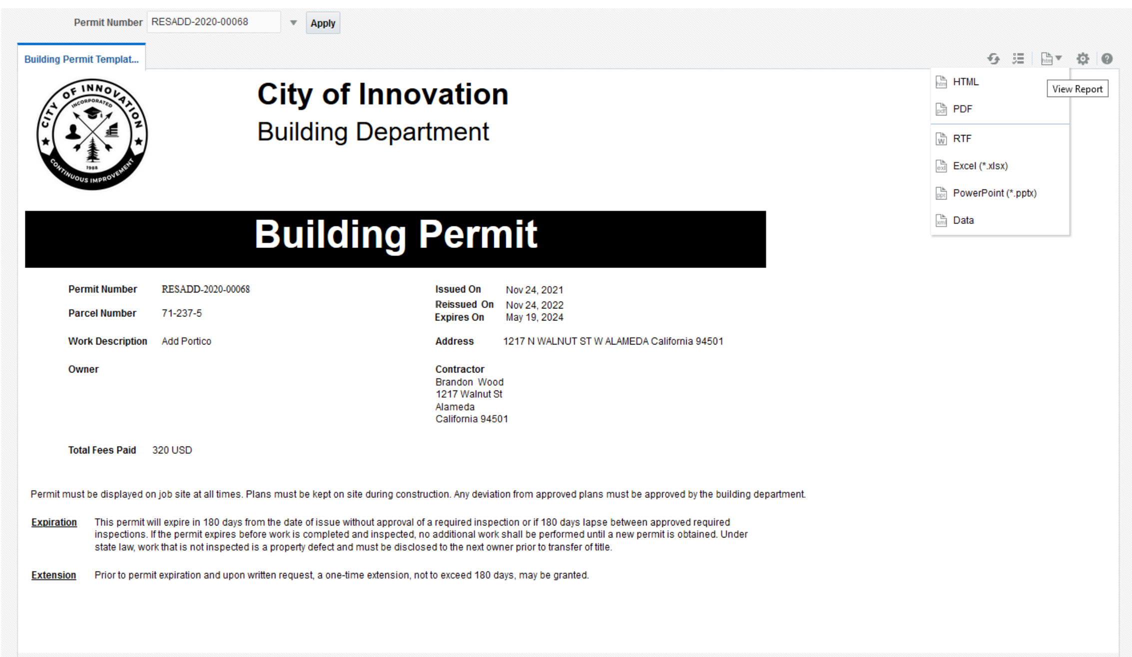
Agency staff can now find reports and dashboards in the business intelligence catalog with the Reports and Analytics work area. Reports and Analytics includes all analyses, dashboards, and reports, such as permit activity, building permits, business license certificates, receipts, deposit slips, inspection 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.



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.

ORACLE

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*.

15 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	This is the primary key used by all keyboard users to move from each control that can accept focus. • Use Tab to select any actionable or field just like you can use the mouse to select any field on the page. • For folder tabs, the Tab key will take you to a tab, and then you have to use other keys to select and navigate within that tab. • For radio buttons the Tab key will take you to the first radio button in a radio button set, and then you have to use other keys to select items within the radio button set. • For drop-down lists, the Tab key will take you to the list field, and then you have to use other keys to move through values and select values.
Shift+Tab	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.

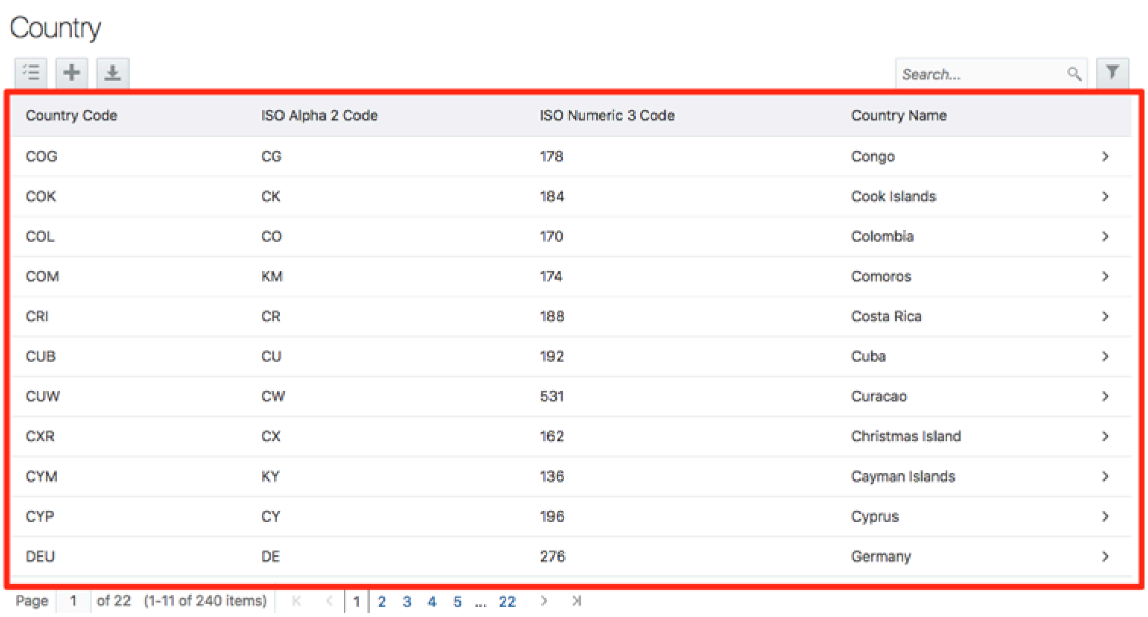
Keyboard Shortcut	Description
Spacebar	Use for: • Selecting a tab • Activating a button • Selecting a checkbox • Selecting a radio button that is not selected
Enter	Use to: • Press a button. • Click a link. • Select an item from a drop-down list.
Down Arrow	Use for: • Moving through values in a drop-down list • Selecting different values in a set of radio buttons • Moving between different folder tabs
Up Arrow	Works the same as the Down Arrow, except it enables you to move in the opposite direction (previous instead of next).
Left Arrow	Works similar to the Up Arrow.
Right Arrow	Works similar to the Down Arrow.
Home	When in the context of tabs, sets focus to the first tab.
Ctrl+Home	Takes you to the very top of a page.

Using the Keyboard with Data Collections

This topic describes examples of how to use keyboard shortcuts to navigate within the various collections, such as tables and lists, and select actionable items.

Tables

This section describes how to navigate within tables appearing on a page. The example below uses the Country table for illustration.



Country

Country Code	ISO Alpha 2 Code	ISO Numeric 3 Code	Country Name
COG	CG	178	Congo
COK	CK	184	Cook Islands
COL	CO	170	Colombia
COM	KM	174	Comoros
CRI	CR	188	Costa Rica
CUB	CU	192	Cuba
CUW	CW	531	Curacao
CXR	CX	162	Christmas Island
CYM	KY	136	Cayman Islands
CYP	CY	196	Cyprus
DEU	DE	276	Germany

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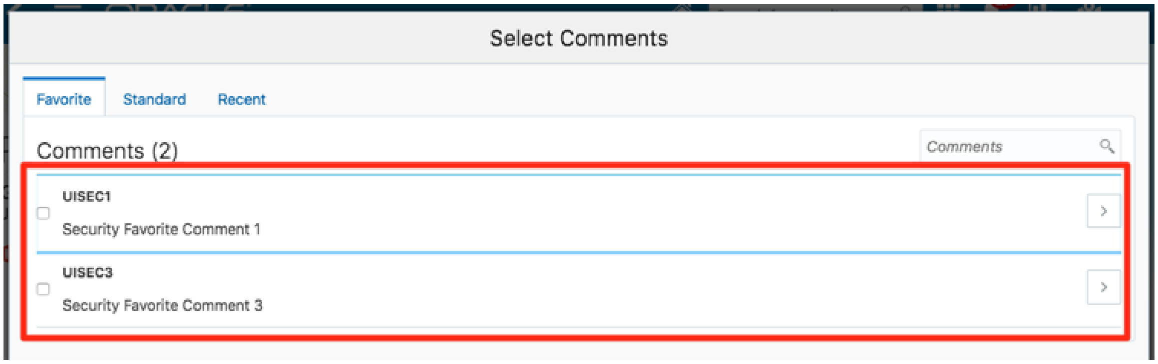
Target	Key	Description
Cell	Tab	The first Tab into the table moves focus to the first column header. The second Tab moves focus to the next focusable element outside of the table. If focus is on a row and the row has been placed in actionable mode using the F2 key, then Tab moves focus to the next focusable element within the row. If focus is already on the last focusable element, then focus will wrap to the first focusable element in the row.
	Shift+Tab	The first Shift+Tab into the table moves focus to the first column header. The second Shift+Tab moves focus to the previous focusable element outside of the table. If focus is on a row and the row is actionable, then Shift+Tab moves focus to the previous focusable element within the row. If focus is already on the first focusable element, then focus will wrap to the last focusable element in the row.
	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.



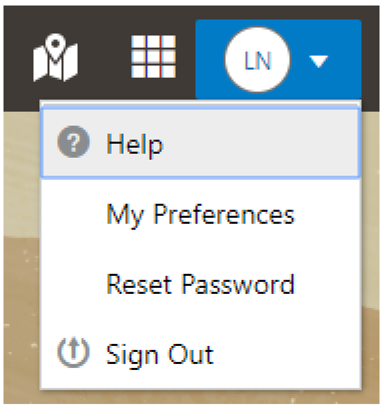
Target	Key	Description
List Item	F2	Enters Actionable mode. This enables keyboard action on elements inside the item, including navigation between focusable elements inside the item.
	Esc	Exits Actionable mode.
	Tab	When in Actionable Mode, navigates to next focusable element within the item. If the 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

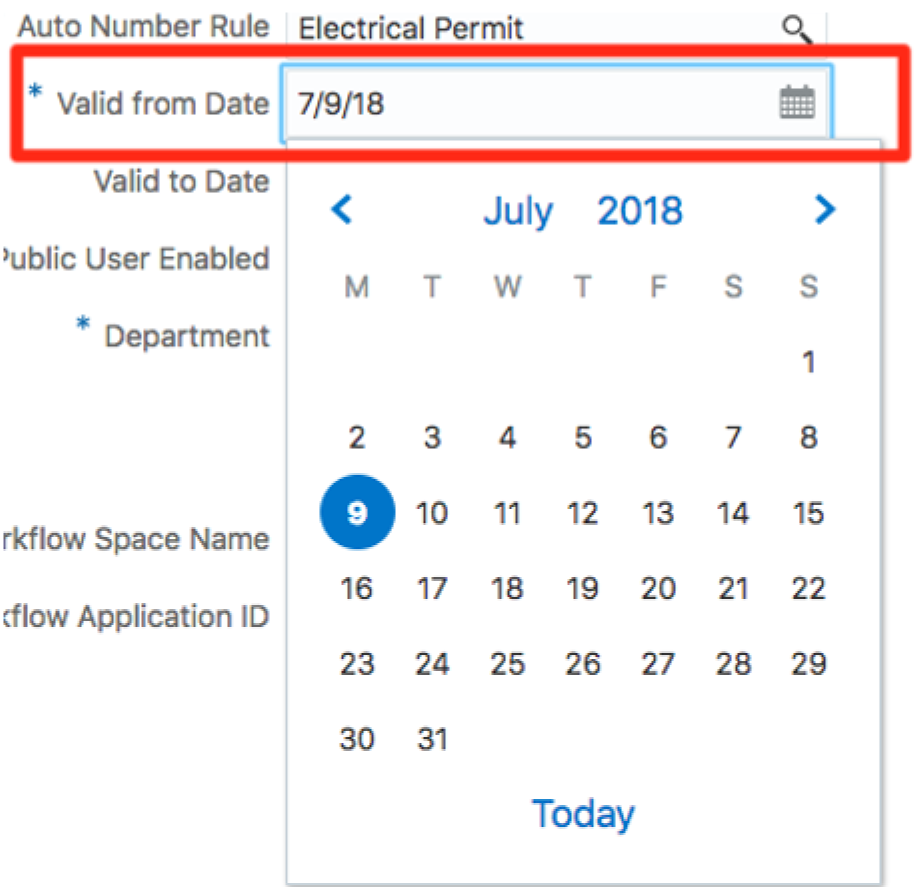
This section describes how to use the keyboard to control buttons in the global header or on pages.



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.

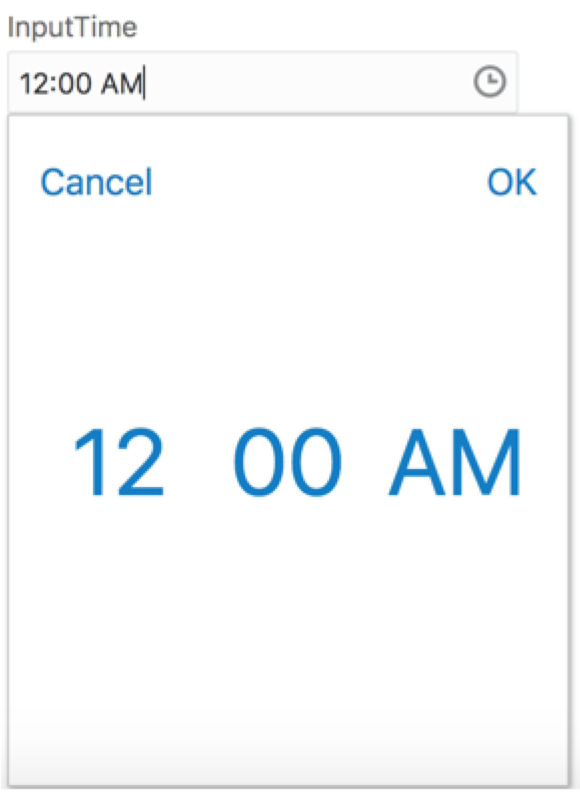


Target	Key	Description
Input Element	Down Arrow or Up Arrow	Shows the calender grid and moves the focus into the expanded grid
	Esc	Close the grid.
	Tab In	Set focus to the input. If hints, title or messages exist in a note window, displays the note window.
Picker	Enter	Select the currently focused day
	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

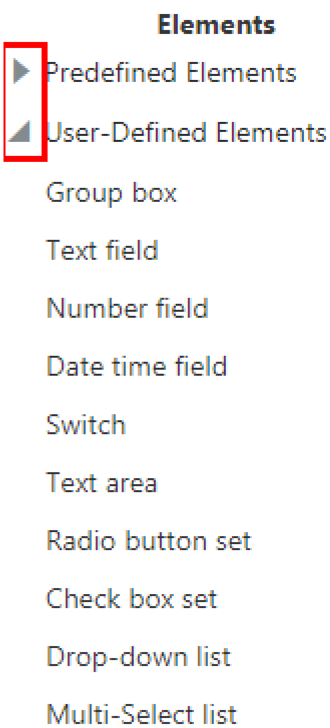
This section describes the hot keys you can use when working with the time picker control to select time field values.



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.



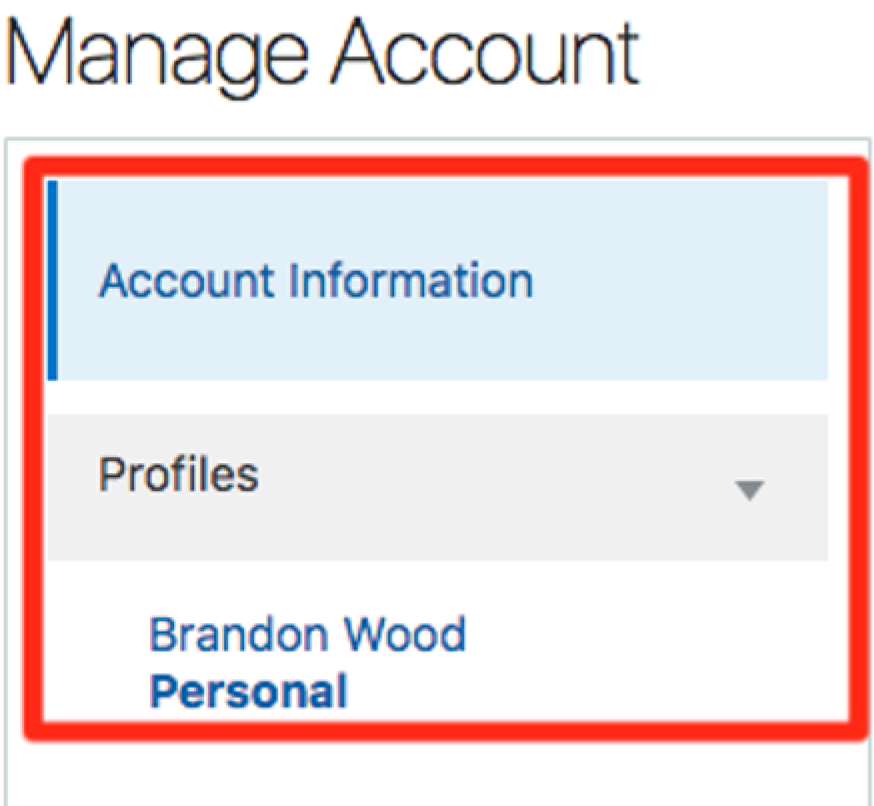
The following table lists the keyboard options for working with the collapsible headers.

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.



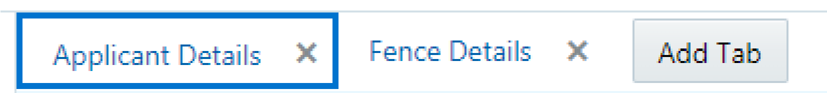
The following table lists the keyboard options used for accessing list items.

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.