Bookings Management User Guide

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Pathway 3.08 (Thick Client Version)

Table of Contents

BOOKINGS MANAGEMENT USER GUIDE

Overview

The Pathway Bookings Management module allows the entry and control of details relating to the hiring of council venues. In addition, tracking of street closures and park usage is available so that council can control the events that are being hosted.

The Bookings Management System allows the recording of bookings for venues that a council may manage e.g. Halls, Parks etc. In addition it enables a council to book streets and parks with events that are being held, e.g. the filming of a film or commercial requires a number of streets to be blocked to the public for a certain amount of time.

It allows a council to record each booking, including the appropriate contacts and resources that are required.

There are two types of bookings that can be created, a “Facility” booking and an “Event” booking.

A Facility booking is one that books either an existing facility that council owns and runs, e.g. community hall or a non-Council Facility.

An Event booking is one that books an open space of some kind that can be used by the general public, e.g. a park, roads etc, where these require notification to the public, warning of closures etc.

Bookings Management Parameters

The Bookings Management Parameters allow the user to define a number of Classes. This is a menu option available in the menu structure. Users assigned this menu option are able to create and maintain the classes defined by a council. This would be defined by a System Administrator who controls the number of classes that are defined and who is able to access the Class.

The following parameter categories apply to the Bookings Management module.

- System
- Area
- Class
- Fee Code
- Discount Reasons
- Note Types
- Workflow
- Extract Types
- Merge Types
- Responses
- Resources
- Attributes
- Customer Type
- Paper Clip
- Conditions
- Request Status
- Cancelled/Declined Reasons
- Facility Types
- Facilities
- Activity Types

Bookings Management Parameters are defined per “Class”. This allows Facilities and Events to be defined and use their own parameters.

The following topics are included in this section:

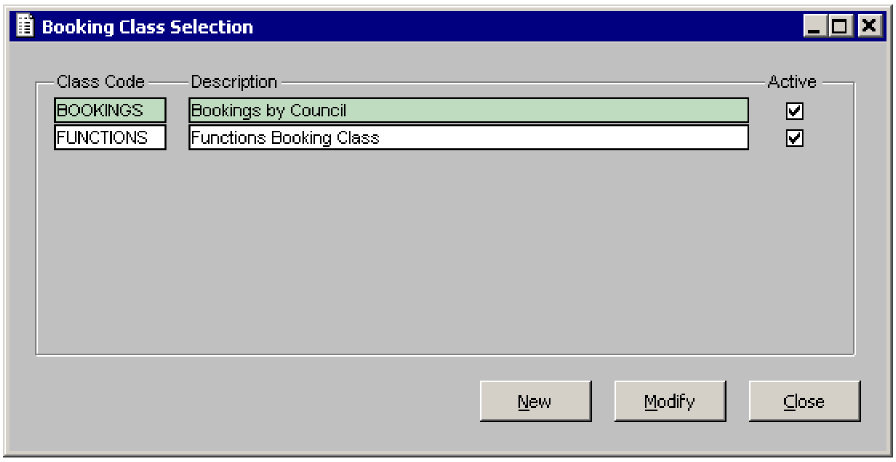
Bookings Management Classes

A Class is the high level grouping that is used to encompass a work unit within a council. For example, a council may have two classes defined, e.g., “Event & Film Facilitation Bookings” and “Facilities Bookings”.

This allows a council to define parameters and create bookings in each Class and provide appropriate security, fee structure and processing.

Booking Class Selection Form

The Booking Class Selection form allows the setup and maintenance of Bookings Classes. Select the New button to create a new class, or select the Modify button to maintain an existing class.



Booking Class Selection form

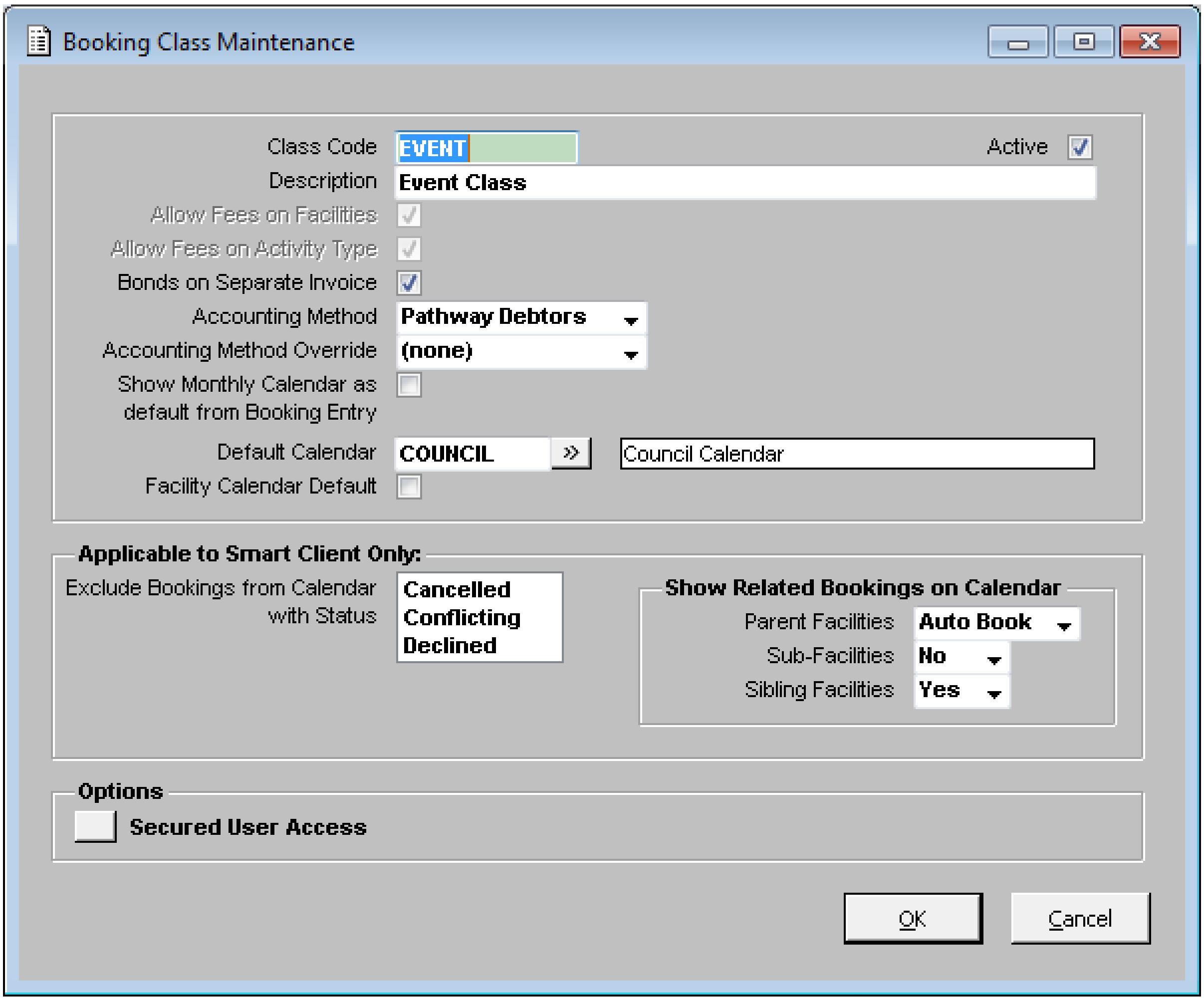
Class Code
This is the code for the class, e.g. EVENTS or FUNCTIONS. This field is display only.

Class Description
This is the description of the class, e.g. Event and Film Facilitation or Functions Booking Class. This field is display only.

Active Flag
This flag indicates whether the class is active and available for use. The flag is not maintainable from this form. Clicking on this field will display the Booking Class Maintenance form.

Booking Class Maintenance Form

The Booking Class Maintenance form allows the setup of Booking Classes with the ability to specify whether fees are to be allowed as well as secured User access.



Booking Class Maintenance form

Class Code
This is the code for identification of the class, e.g. EVENT or FACILITY. This field is mandatory and has a maximum length of 10 characters.

Class Description
This is the description of the class, e.g. Event and Film Facilitation or Facility Bookings. This field is mandatory and has a maximum length of 50 characters.

Allow Fees on Facilities
This is an ON/OFF flag and allows the user to indicate whether fees will be added against the Facility. If this is set to OFF then the option to define Fee Costs against a Facility will not be available. If this is set to ON then the user will be able to create Fee Costs against the Facility.

Allow Fees on Activity Type
This is an ON/OFF flag and allows the user to indicate whether fees will be added against an Activity Type. If this is set to OFF then the option to define fees against an Activity Type will not be available. If this is set to ON then the user will be able to create Fee Costs against the Activity Type.

In most cases the user will only nominate Fees for one of these options and not the other.

Bonds on Separate Invoice
This indicator determines whether Bonds can be extracted onto a standard Invoice or whether a specific Invoice for Bonds only is required. This is an On/Off flag and defaults to ON. When this setting is ON the user will not be able to select Bonds Fees and Standard Fees together and generate Debtor Transactions. The user will be presented with an Error message and they will be required to select only Bond Fees and generate the Debtor Transactions.

Accounting Method
This field allows council to nominate the Accounting Method to use for the Booking Class. The available options are:
- Pathway Debtors
- Cash

The default setting of this field will be 'Pathway Debtors'. It is a mandatory field and requires that the user select a value from the dropdown.

Accounting Method Override
This field allows the user to nominate whether the charging method can be overridden. This allows the user to set up the class default as 'Cash' but allow some Bookings to be charged via Pathway Debtors. This field has the following options which can be selected from the dropdown list:
- None
- Cash
- Pathway Debtors

This field is able to be set to (None) or the opposing value contained in the Accounting Method, i.e. if Accounting Method is set to Cash, then Accounting Method Override can be set to (None) or Pathway Debtors. If Accounting Method is set to Pathway Debtors then Accounting Method Override can be set to (None) or Cash.

If (None) is selected, then an override accounting method will not be able to be selected at the Booking Request level. If Pathway Debtors or Cash is selected, then the user will be able to override the setting of the Accounting Method at the Booking Request level.

Show Monthly Calendar as default from Booking Entry
Checking on the "Show Monthly Calendar as Default from Booking Entry" indicator will cause Booking Entry and Enquiry to display the Monthly Calendar view rather than the weekly Calendar view when the 'Display Calendar' button is used on a Booking Line.

The default value is 'OFF', i.e. the Weekly Calendar view will be shown by default.

Note: Where the Weekly Calendar is not available, this field will not be shown. In this situation the only available Calendar will be the Monthly view.

Default Calendar

A default Calendar may be set up here to be used at the Class level by the Bookings module. If a default calendar has been set, then all class related booking date/time calculations (including Workflow Task date/time calculations, the Weekly and Monthly Facility Calendars and the Weekly Resources Calendar) will be based on the Class level calendar. If no default class calendar is set, the System default calendar will be used.

Facility Calendar Default
The availability of the new Facility Weekly Calendar, Facility Monthly Calendar and Resource Calendar is determined by this flag. If it is checked ON then the new calendars will be available from Booking Entry/Maintenance. If this flag is checked OFF, then only the original Calendars (Monthly and Weekly) will be available.

Active Flag
The Active flag signifies whether the Class is an Active class and can be accessed to create new Bookings. This field defaults to ON. If a Class has been made inactive then the Class will only be available through Bookings Enquiry to allow the user to search for Bookings within the class.

Options – Secured User Access
This option allows a council to determine the access to classes and the level of authority that is applicable for each user. Individual Users will be assigned to each option to determine the authority that each will have. Selecting this option displays the Booking Class User Access Maintenance form.

Exclude Bookings from Calendar with Status

This option allows users to elect to hide or display Cancelled, Conflicting or Declined Bookings on the Calendar, i.e. it enables the exclusion of items from displaying in the Calendar for Booking Requests which have a Status of ‘Cancelled’, ‘Conflicting’ or ‘Declined’.

Show Related Bookings on Calendar
Show Parent Bookings - This controls whether bookings for Parent Facilities are also shown when one of their Sub-Facilities is selected:

- Yes - Related Parent Facility bookings are shown.
- No – Related Parent Facility bookings are not shown.
- Auto-Book - Related Parent Facility bookings are shown only if the Sub-Facility has ‘Auto-Book’ turned on. This is the default value because it matches the pre-existing functionality.

Show Sub-Facility Bookings - This controls whether bookings for Sub-Facilities are also shown when their Parent Facility is selected:

- Yes – Related Sub-Facility bookings are shown.
- No - Related Sub-Facility bookings are not shown. This is the default value because it matches the pre-existing functionality.

Show Sibling Sub-Facility Bookings - This controls whether bookings for sibling Sub-Facilities are also shown when one of their sibling Sub-Facilities is selected:

- Yes - Related Sibling Sub-Facility bookings are shown. This is the default value because it matches the pre-existing functionality.
- No - Related Sibling Sub-Facility bookings are not shown.

As described above, the new parameters can be used to control whether related Primary Facility bookings, Sub-Facility bookings and Sibling Sub-Facility bookings are also shown on the calendar. This applies only in the situation where one or more Facilities are nominated using the Selected Facilities section at the top of the form, as shown below.

Booking Class User Access Maintenance form

This form allows an administrator to determine which users have access to a class. The level of authority to the class can then also be defined. The options available are Maintenance or Enquiry. If the user has Maintenance access then they will be able to maintain (this involves adding and updating) Bookings within the class. If the user has Enquiry access then they will only be able to enquire on the Bookings within the class.

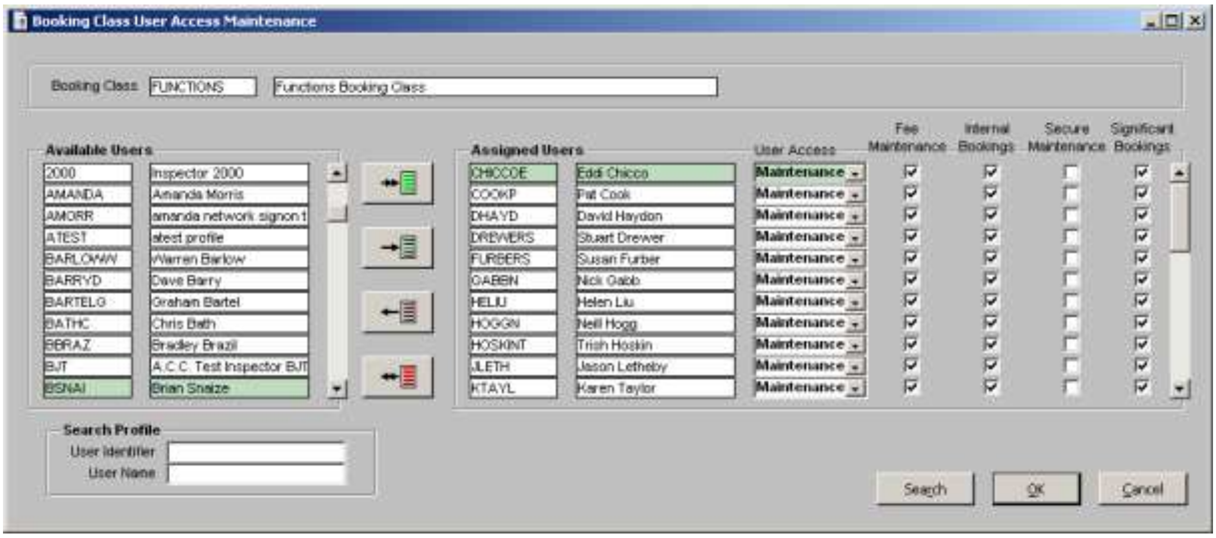
This authority will take effect when the user accesses either Bookings Maintenance or Bookings Enquiry from the menu.

An option called “Secure Maintenance” is available in Booking Class User Access Maintenance to provide security over Booking Request Maintenance. If a user is granted “Maintenance” authority (User Access) and the ‘Secure Maintenance’ flag is checked ON then this user has the ability to change/maintain other user Bookings and will be able to access all Booking Requests in maintenance mode. If the checkbox is OFF, the user will only be able to maintain Booking Requests for which he/she is the Responsible Officer.

Note: The Administrator (SCASYS) can always access all Booking Requests in maintenance mode.

Accessing the Bookings Maintenance menu option will present the user with a selection form listing the Classes for which they have maintenance authority. If only a single class is allocated with maintenance authority then the selection of the class will not be required. Once the class has been selected the user will be presented with the Booking Search Profile screen from which searches can be performed, existing bookings maintained or new bookings added.

Accessing the Bookings Enquiry menu option will present the user with a list of Classes for which they have maintenance and enquiry access. If the user has access to only a single class then the class will automatically be selected without the user requiring to select the class. If the user has access to many classes then they will be required to select the class that enquiries are to be made upon. Note that if the Bookings Enquiry menu option is selected then no maintenance can be performed against Bookings, regardless of the authority setting.



Booking Class User Access Maintenance form

If a user is allocated Maintenance Access to the Class, then they will have the ability to be assigned to the following set of authorities.

Fee Maintenance – This allows the user to maintain Fee details against the Booking. By default the user will be assigned this authority if they have been allocated with Maintenance access to the Class. This allows the user to maintain Fee details against a Booking. If the user is not assigned Fee Maintenance, then the user will only be provided with enquiry access to the Fee details against a Booking.

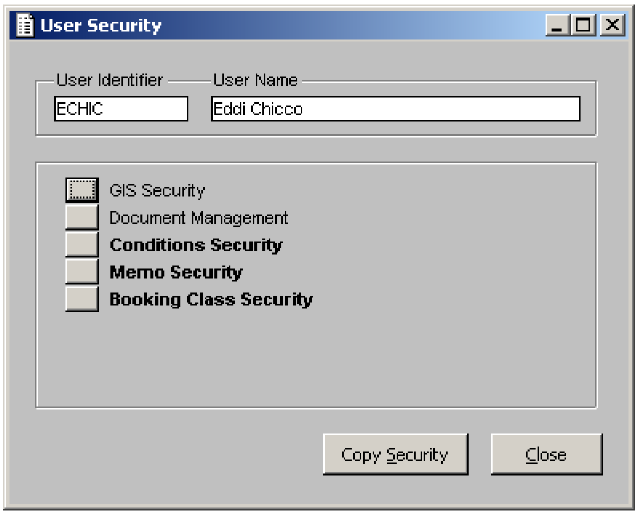
Internal Bookings – This option determines whether the user has the authority to create Internal Bookings. By default the user will be assigned this authority if they have been allocated with Maintenance access to the Class. An Internal Booking will be one that is added for council use only. This would be used where a booking is added to record maintenance against a Facility. Fees will not be added for Internal Bookings but all other functionality will be the same.

Secure Maintenance – This option provides security over Booking Maintenance. When ‘User Access’ is set to ‘Maintenance’ this checkbox will be set ON (by default) and users will have maintenance authority over all Booking Requests. The checkbox may be turned OFF if required. If the checkbox is OFF, the user will only be able to maintain Booking Requests for which he/she is the Responsible Officer. All other Booking Requests will be accessed in Enquiry mode.

Note: The above option is available at Release 2.20.

Significant Bookings – This option determines which users can set on the “Significant Booking” indicator against Bookings. Users will need to be assigned to this option to be able to set on the “Significant Booking” Indicator.

The assignment of these security options is also be available through User Maintenance in System Parameter Maintenance>>Menu Maintenance. This allows the assignment of the appropriate authorities when a new user is added. (See form below)



User Security form

Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings.

Available Users
These fields display the Users and Descriptions available to be assigned. Use the Select and Remove buttons to make any selections.

Assigned Users
These fields display the Users that have been assigned. Once users are assigned they can be given Enquiry or Maintenance access.

User Access
The options available can be selected from the dropdown list. The available options for User Access are as follows:

- Enquiry
- Maintenance

If the Maintenance option is selected the following flags become available:

- Fee Maintenance
- Internal Bookings
- Significant Bookings

Fee Maintenance flag
If the Maintenance User Access option is selected in the User Access field, then this flag becomes available for selection.

This allows the user to maintain Fee details against the Booking. By default the user will be assigned this authority if they have been allocated with Maintenance access to the Class. This allows the user to maintain Fee details against a Booking. If the user is not assigned Fee Maintenance, then the user will only be provided with enquiry access to the Fee details against a Booking.

The assignment of this security option is also available through User Maintenance in System Parameter Maintenance, Menu Maintenance. This allows the assignment of the appropriate authorities when a new user is added.

Internal Bookings flag
If the Maintenance User Access option is selected in the User Access field, then this flag becomes available for selection.

This option determines whether the user has the authority to create Internal Bookings. By default the user will be assigned this authority if they have been allocated with Maintenance access to the Class. An Internal Booking will be one that is added for council use only. This would be used where a booking is added to record maintenance against a Facility. Fees will not be added for Internal Bookings but all other functionality will be the same.

The assignment of this security option is also available through User Maintenance in System Parameter Maintenance, Menu Maintenance. This allows the assignment of the appropriate authorities when a new user is added.

Secure Maintenance flag

If the Maintenance User Access option is selected in the User Access field, then this flag becomes available for selection.

This option provides security over Booking Maintenance. When ‘User Access’ is set to ‘Maintenance’ this checkbox will be set ON (by default) and users will have maintenance authority over all Booking Requests. The checkbox may be turned OFF if required. If the checkbox is OFF, the user will only be able to maintain Booking Requests for which he/she is the Responsible Officer. All other Booking Requests will be accessed in Enquiry mode.

Significant Bookings flag

If the Maintenance User Access option is selected in the User Access field, then this flag becomes available for selection.

This option determines which users can set on the “Significant Booking” indicator against Bookings. Users will need to be assigned to this option to be able to set on the “Significant Booking” Indicator.

The assignment of this security option is also available through User Maintenance in System Parameter Maintenance, Menu Maintenance. This allows the assignment of the appropriate authorities when a new user is added.

Search Profile – User Identifier/User Name

These fields allow a User Identifier and/or User Name to be entered as a search profile. This becomes useful when there are more than 9 Available Users to search through.

Booking Areas

One or more Areas are able to be defined for the Bookings Management module. Booking Areas is an option separate from Class parameters. An Area can be linked to Facilities to allow searching and reporting. Areas represent community reporting areas within the council area. One Area may be linked to each Facility. 'Area' will be available on the Booking Search Profile screen to allow users to search for Facilities or Bookings in a specific Area.

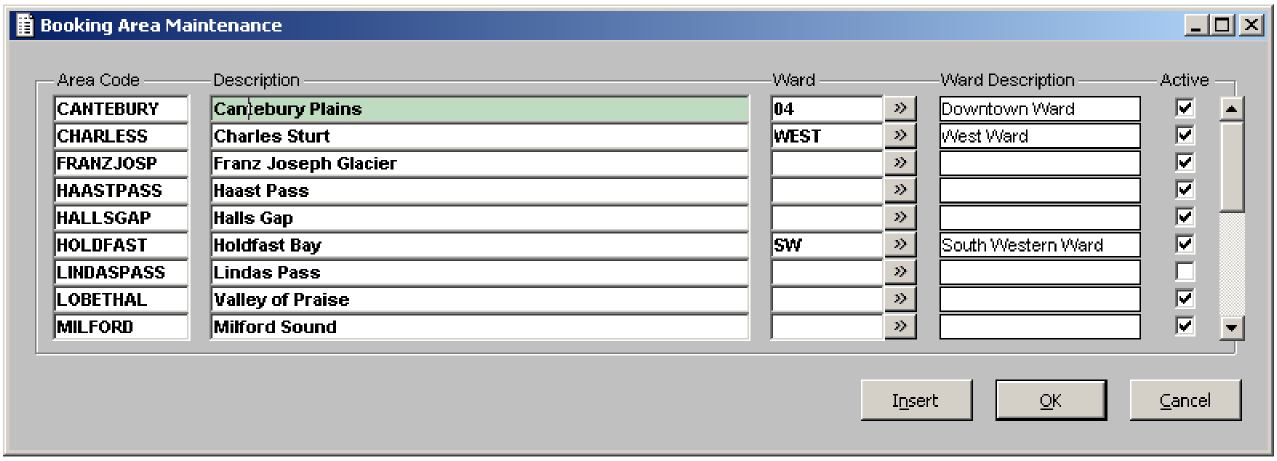
Areas are automatically linked to a Booking Request once the Facilities have been added against the Booking Request. Areas are an option against the Booking Request.

The following fields are available against an Area:

- Area Code
- Area Description
- Ward

Booking Area Maintenance Form

The Booking Area Maintenance form allows the user to establish Booking Areas for use within the Bookings Management module. Areas represent community reporting areas within the council area. One area is able to be linked to each Facility. Area is available on the Booking Search Profile screen to allow users to search for Facilities or Requests in an Area.



Booking Area Maintenance form

Area Code
This is the code of the area and is a 10 character, mandatory field. Users may choose to set this up with a specified meaning within the code.

Area Description
This allows the entry of the description of the area and is a 50 character mandatory field.

Ward / Ward Description
Where a Street/Suburb is linked directly to the Booking Request then the Ward details will be determined by the Ward linked to the Street\Suburb in Property. If no Ward is linked to the Street/Suburb then the user is required to manually add the Area details against the Booking.

Active Flag

This is an On/Off type field (set to ON by default) to determine whether the Area can be used. Standard Pathway functionality allows any Active Areas to be associated with a Facility, but not allow any Inactive Areas to be associated. If an Area was previously associated with a Facility and then subsequently made inactive, the area will still be listed against the Facility, however, it will not be available to be linked to any new facilities that are created.

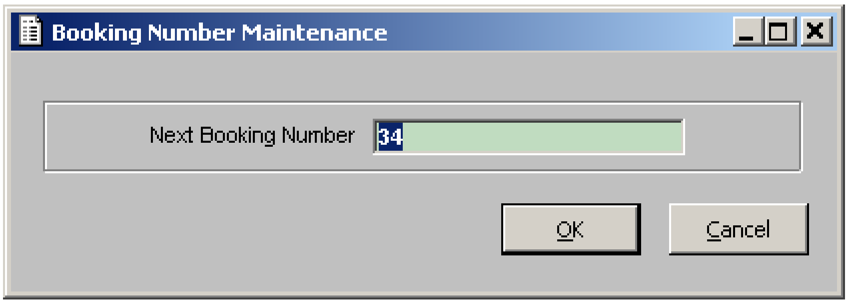
Booking Number Maintenance

A Booking Request is a request from a Customer to book and use Facilities or apply to council to hold an Event. Booking Requests are created within each class.

Booking Numbers are numbers allocated to each Booking Request. Booking Numbers are not unique within each class, i.e. The Facility Class could have Booking Request 1 and the Event Class the next Booking Request Number of 2. This approach has been taken so that documents generated from the Bookings Management Module will be able to have the same Booking and Payment Reference. A Payment Reference must be unique for the Bookings Management module, and to avoid having two numbers, a single number is utilised. This will be the Booking Request Number. The Booking Request Number is allocated when the Booking Entry is accessed. This means that if the user enters Booking Entry, and then does not save the request, the Booking Number will have been used and will not be used again.

Booking Number Maintenance Form

This form displays the next Booking Number. It allows the user to change the number to another number that has not already been used and is higher than the last number saved on this form.



Booking Number Maintenance form

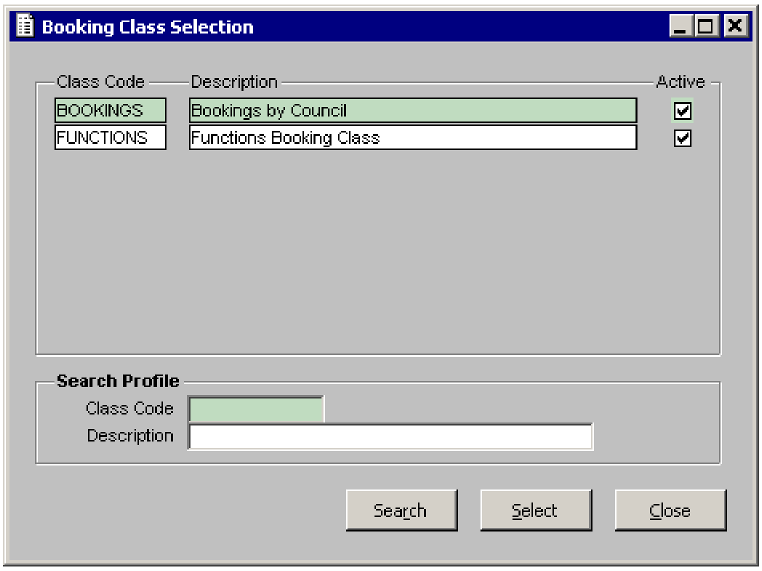
Next Booking Number
Booking Numbers are sequentially allocated to Booking Requests irrespective of the Class of the Request. Booking Numbers are not unique within each class, e.g.. The Facility Class could have Booking Request 1 and the Event Class the next Booking Request Number of 2

Booking Class Parameters

The Class Parameters menu option is available under the Bookings Management Parameters menu option. When this option is accessed, the list of Classes presented will be filtered by the Classes to which the user has been assigned access.

Booking Class Selection Form

The Booking Class Selection form displays for selection a list of Classes to which the user has been assigned access.



Booking Class Selection form

Class Code / Description

The Class Code and Description fields display details of the Classes to which the User has been assigned access.

These fields display details of the available Booking Class consisting of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings.

Active

The Active flag is not maintainable from this form. It is display only and indicates whether or not the Booking Class displayed is available for use. Clicking on this field will activate the Booking Class Parameter Maintenance form.

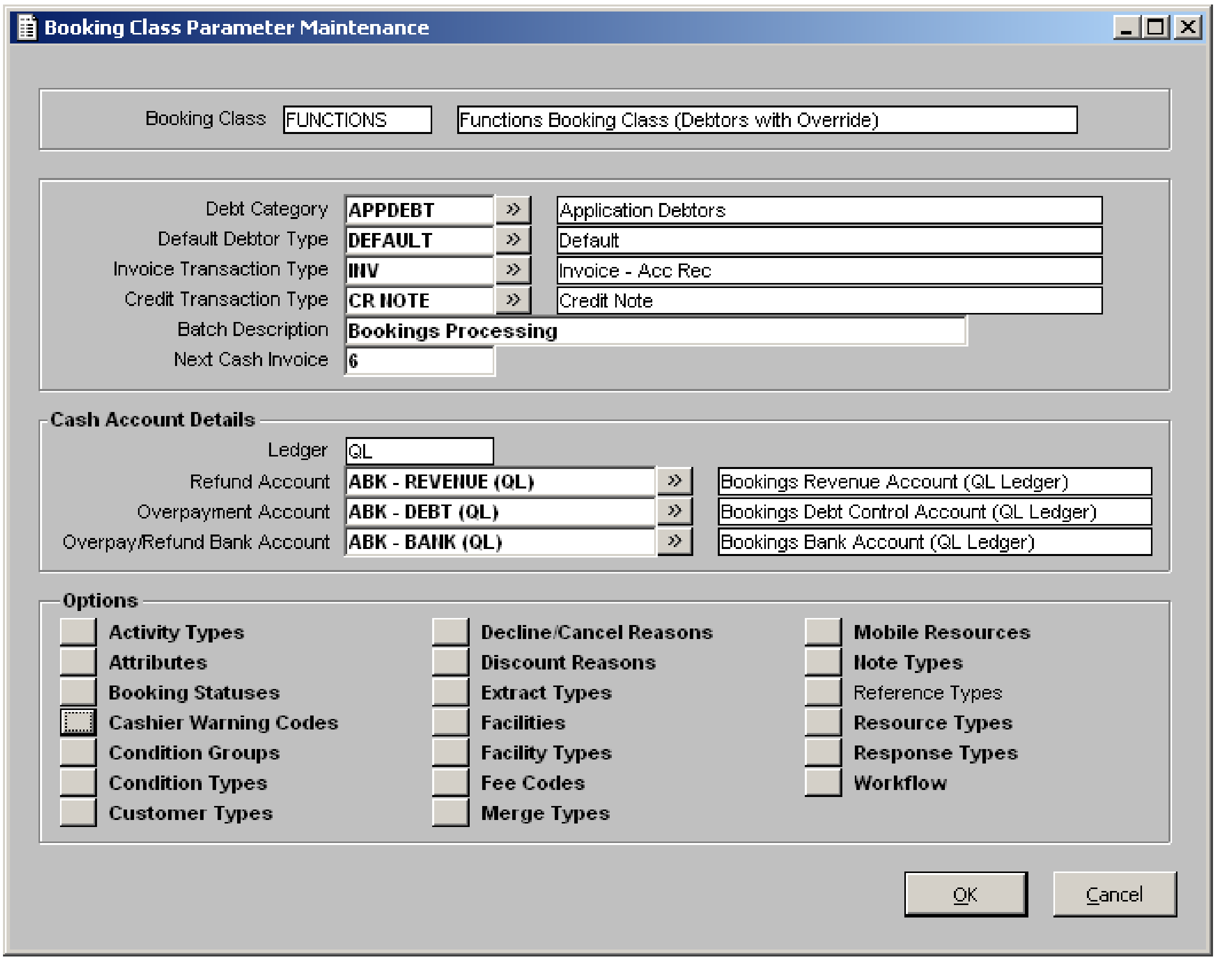
Search Profile – Class Code/Description

These fields allow a search profile to be entered to facilitate a search. This facility is useful when there are more than 9 Classes to search through.

Booking Class Parameter Maintenance Form

The Booking Class Parameter Maintenance form enables the user to set up all parameters against a Booking Class. The following fields need to be defined by the user against the class.

- Debt Category Code
- Invoice Transaction Type
- Credit Transaction Type
- Batch Description



Booking Class Parameter Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FUNCTIONS and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings.

Debt Category

The Debt Category Code that applies to the Class needs to be selected. A selection is required to be made from the Rate Category Pop Up which contains codes defined within the Debtors Module. This will assume that any specific Debt Category Codes required for Bookings have already been created within Debtors. The Debt Category Code is used to create Debt Types in Debtors for Fee Codes. This field is mandatory.

Default Debtor Type

The Default Debtor Type field is an optional field which may be selected from existing Debtor Types as defined within the Debtors Module. The Debtor Type controls various parameters about the Debtor, e.g. the Default Tern period, Statement Type and Default Credit Limit etc. Instead of being restricted to using the Default Debtor Type as defined within Debtors, this field allows the user to select an alternate Default Debtor Type appropriate for the Booking Class.

If a Debtor Type is chosen for a Booking Class then Debtors will create and allocate a Debtor Number for use by the Customer Profile through a relatively simple process involving no more than a few steps. Whilst the Default Debtor Type is optional, if no Default Debtor Type is specified for the Booking Class, the Customer Profile and Debtor creation process uses a more complex method of Debtor creation requiring several additional steps.

Note: It is recommended, therefore that every Booking Class should have a Default Debtor Type assigned, even if it is the same Debtor Type that Debtors has as its default value. Doing so will ensure that Debtor Creation utilises the simple process.

See further details on Creation of a Debtor via Customer Profile Maintenance.

Invoice Transaction Type
The Invoice Transaction Type is selected from the list of available Transaction Types within the Debtors Module. A selection is required to be made from the Transaction Type Pop Up which contains codes defined within the Debtors Module. This field is mandatory. The Invoice Transaction Type is used in the production of Invoices in Debtors for a Booking.

Credit Transaction Type

The Credit Transaction Type is selected from the list of available Transaction Types within the Debtors Module. A selection is required to be made from the Transaction Type Pop Up which contains codes defined within the Debtors Module. This field is mandatory. The Credit Transaction Type is used when credit transactions are generated in Debtors for a Booking.

Batch Description
The Batch Description is a free format 50-character text field. This field is mandatory and is used when Invoice or Credit Note transactions are created in Debtors. The Debtors Module generates a batch of invoice or credit note transactions and each batch will have this description applied.

Next Cash Invoice
This numeric field allows the entry of an Invoice Number. The number is not able to be set to a value less than it currently contains. It is only able to be set to a number greater than its current value.

This field is only available if the user is able to Invoice a Booking Request using the Cash method. If the Cash Method is unavailable then this field will be hidden.

Cash Account Details

The Cash Account Details fields allow accounts to be set up to handle Cash Invoicing. The fields available are:
- Ledger
- Refund Account
- Overpayment Account
- Overpay/Refund Bank Account

These accounts are mandatory if the Accounting Method has been set to Cash. The Overpayment Account is used if an amount greater than the outstanding amount is paid against a Booking. The Refund Account is used if money is to be refunded to the customer. This may be a Bond Refund, or the reduction of a charged amount.

Options - Activity Types
Selection of the Activity Types button will display the Activity Type Search Profile which allows the user to create a new Activity Type or search for an existing one.

Options - Attributes

Selection of the Attributes button will display the Attribute Maintenance form which allows the user to define Attributes for a Booking Class which can be assigned to a Facility or an Activity Type.

Options - Booking Statuses
Selection of the Booking Statuses button will display the Booking Status Maintenance form to allow the user to establish Status Codes based on the various System Statuses available. These may be applied to a Booking Request or a Booking Line.

Cashier Warning Codes
Selection of the Cashier Warning Codes option button displays the Warning Code Maintenance form (a Receipting form). This option allows users to create Cashier Warning Codes for any Booking Requests that are being processed in Cash mode but should not be processed. (The standard interface to Receipting Cashier Warning Codes has been provided).

Options - Condition Groups
Selection of the Condition Groups button will display the Condition Group Maintenance form to enable the categorisation of Condition Type details, within each module.

Options - Condition Types
Selection of the Condition Types button will display the Condition Types Maintenance form to allow the user to create or maintain Condition Type details.

Options - Customer Types
Selection of the Customer Types button will display the Customer Type Maintenance form to allow the user to define a list of options that classifies the customer making the Booking. Details that may be recorded for this parameter are “Religious”, “Community”, “Business”, and “Commercial” etc.

Options - Decline/Cancel Reasons
Selection of the Decline/Cancel Reasons button will display the Decline/Cancel Reason Maintenance form which allows the user to establish Reasons which can be recorded for the Cancellation of a Booking Request.

Options - Discount Reasons
Selection of the Discount Reasons button will display the Discount Reason Maintenance form.

Options - Extract Types
Selection of the Extract Types button will display the Extract Type Search Profile where the user may create new Extract Types or search for existing ones. See Word Processing details.

Options - Facilities
Selection of the Facilities button will display the Facility Search Profile to allow the user to create new Facilities or, alternatively, to search for existing ones.

Options - Facility Types
Selection of the Facility Types button will display the Facility Type Search Profile to allow the user to create new Facility Types or, alternatively, to search for existing ones.

Options - Fee Codes
Selection of the Fee Codes button will display the Fee Code Search Profile to allow the user to create new Fee Codes or search for existing ones.

Options - Merge Types
Selection of the Merge Types button will display the Merge Type Maintenance form where the user may create new Merge Types or search for existing ones. See Word Processing details.

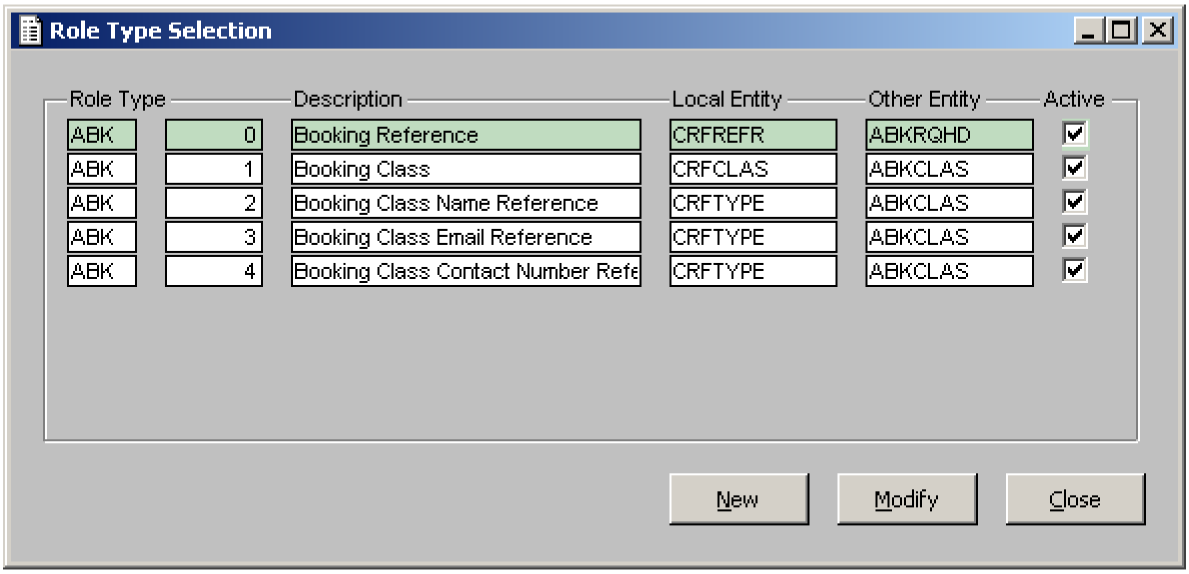
Options – Mobile Resources
Selection of the Mobile Resources button will display the Mobile Resource Search Profile form where the user may create new Mobile Resources or search for existing ones.

Options - Note Types
Selection of the Note Types button will display the Note Type Search Profile to allow the user to add a new Note Type or search for an existing one.

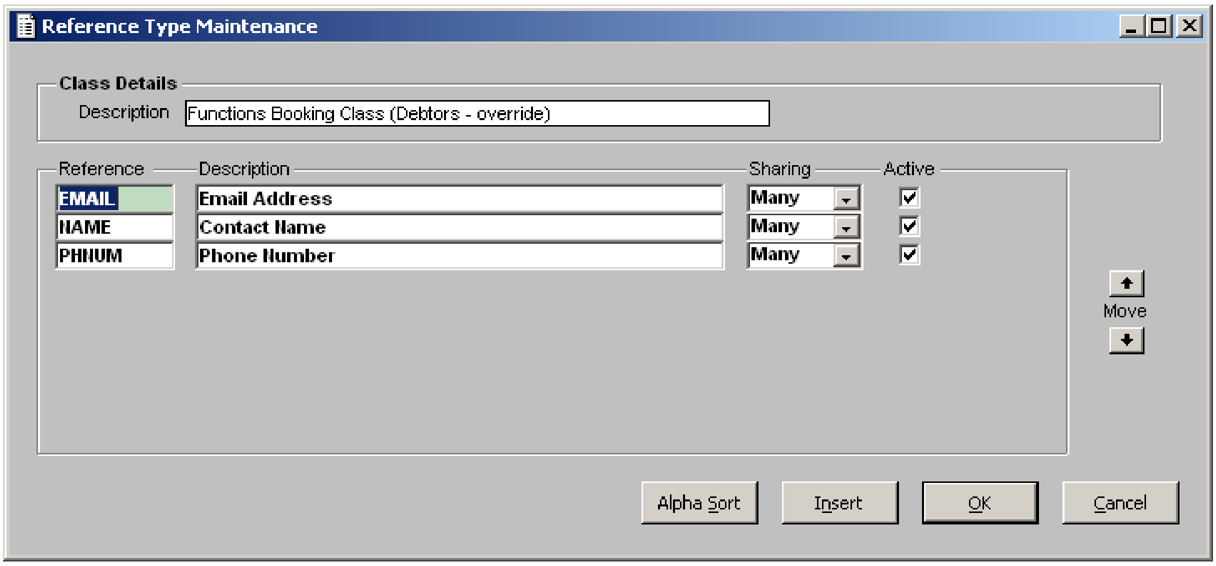
Options – Reference Types

Selection of the Reference Types option button displays the Reference Type Maintenance form where Reference Types may be defined and maintained. Three new Role Types have been defined in References to allow three new Reference Classes to be linked to a Booking class. This allows councils to define 3 Reference Types against a Booking Class (e.g. Email, Name and Phone). These Reference Types are useful within Booking Maintenance and especially required by ePathway – Bookings as a means of storing the Name, Email and Phone number details of a web user.

See further details in section on Reference Types



References – Role Type Selection form showing the new Reference Classes available to a Booking Class



Reference Type Maintenance form displays when the Reference Types Option button is selected in Booking Class Parameter Maintenance

Options - Resource Types

Selection of the Resource Types button will display the Resource Type Maintenance form where Resource Types may be defined for the Booking Class. Examples of Resource Types could be Staff, Equipment etc.

Options - Response Types

Selection of the Response Types button will display the Response Types Maintenance form where the user may set up Response Types for a Booking Class. Responses are utilised within the Word Processing link to Bookings. A response is a text base informational message, recorded against a Word Processing document. It may be used to record phone calls or objections to documentation received.

Options - Workflow

Selection of the Workflow button will display the Workflow Application Maintenance form. Refer to the section on Workflow for further details.

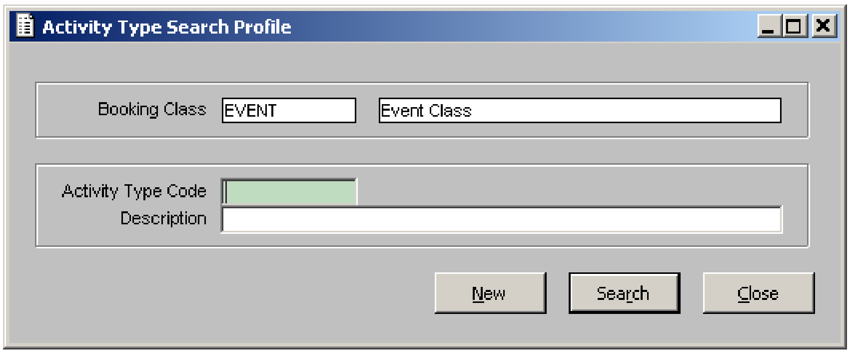
Activity Types

An Activity Type is a type of event e.g. a Food and Wine Festival, or a Street Parade. A council is able to record any number of different Activity Types which are likely to occur and will require managing.

The following forms allow Activity Types to be recorded and maintained.

Activity Type Search Profile form

The Activity Type Search Profile allows the user to create a new Activity Type or search for an existing one.



Activity Type Search Profile

Booking Class

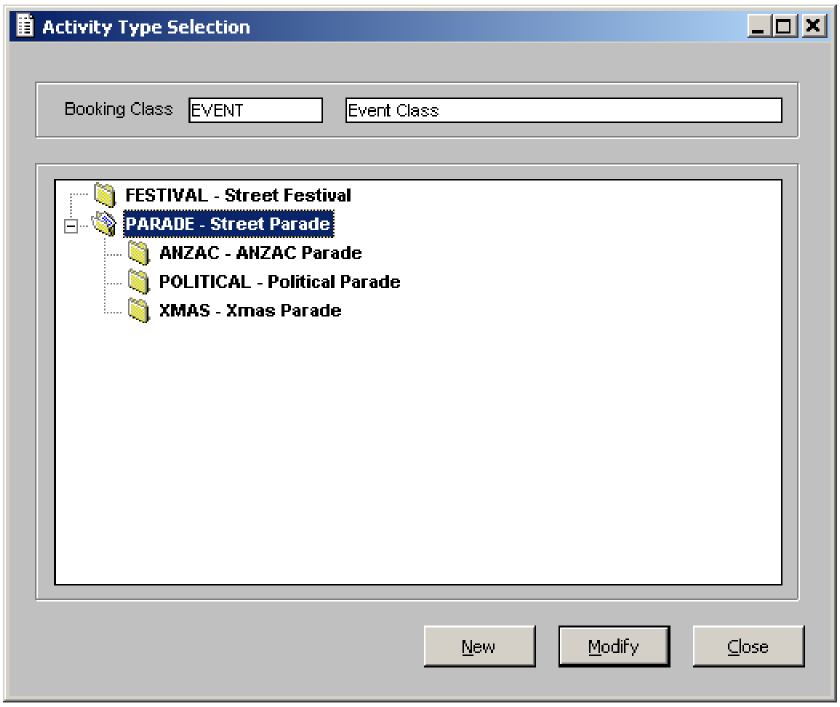
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Activity Type Code/Description

Enter an Activity Type Code and/or Description on which to base your search and then select the Search button.

Activity Type Selection form

The Activity Type Selection form displays when the Search button is selected on the Activity Type Search Profile form if more than one Activity Type exists. It allows the user to select from a hierarchical tree-type list. Clicking on the + or – boxes will expand and collapse the branches of the tree.



Activity Type Selection form

Booking Class

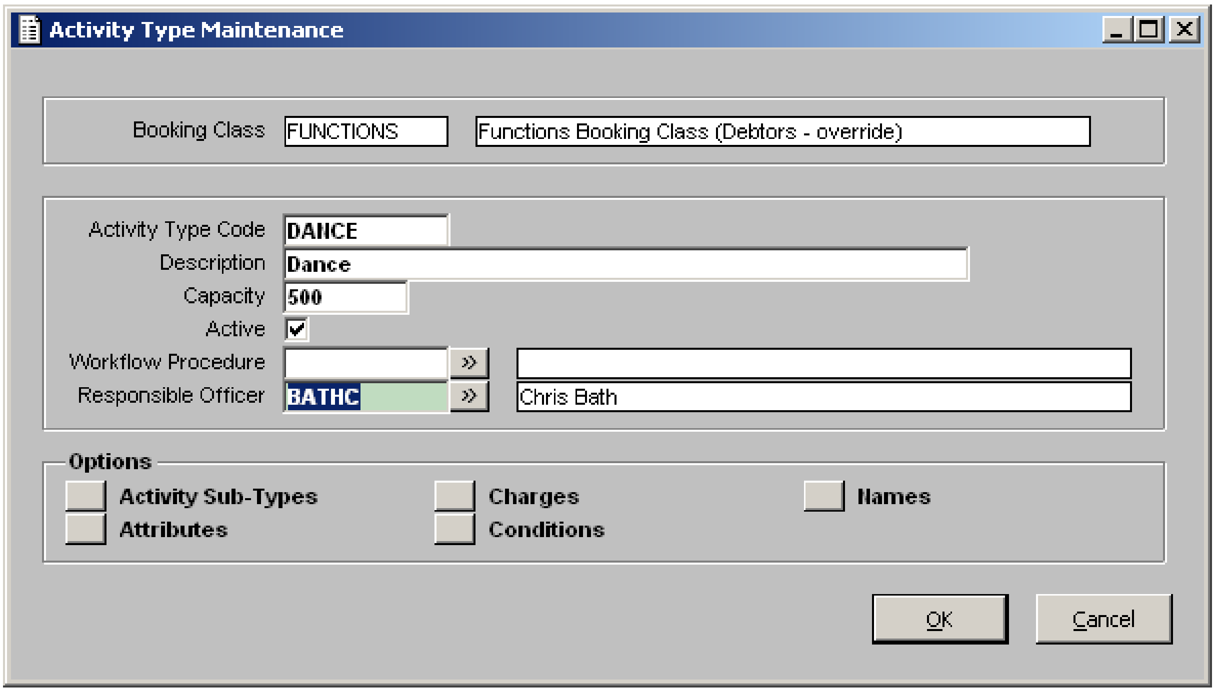
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Activity Type

This field displays the Activity Types which are available for selection. The tree structure allows the expansion of parent Types to display child Types.

Activity Type Maintenance Form

The Activity Type Maintenance form allows parameters to be set up for each Activity Type, e.g. Parade, Film, Concert etc.



Activity Type Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Activity Type Code

This field contains the Activity Type Code, which is a character field (of a maximum of 10 characters) representing the Code of the Activity Type. This field is mandatory. E.g. FILMCOM – This could be the code for a Film Commercial.

Activity Type Description

This field allows a maximum of 50 characters to be entered to describe the Activity Type. This is a mandatory field. E.g. 'Film Commercial' could be entered as the description.

Capacity

This field is an optional numeric field and allows the user to enter the maximum number or persons relating to the type of event.

Active Indicator

This will be an On\Off type field that will determine whether the Activity Type can be selected when a Booking is being made. This will default to ON. If the Active Indicator is set OFF then new Booking Requests of the Activity Type will not be able to be created.

Workflow Procedure

A Workflow Procedure is able to be linked against an Activity Type. The Workflow Procedure will be executed when the Activity Type is used to create a Booking Request. This allows the user to follow the workflow and complete any required actions.

Responsible Officer

The Responsible Officer field allows Council to allocate a Responsible Officer who is to be nominated for a Booking. This is used for Bookings made via ePathway where a specific person within Council needs to be allocated responsibility. If a Responsible Officer is set up at the Activity Sub-Type level, then it will override a Responsible Officer which has been set up at the Activity Type level. If a Facility nominated for the 'first' Booking Line has a default Responsible Officer, then this Officer will override any that already exist on a Booking. Additionally, the Responsible Officer set up at the Sub-Facility level will override one set up at the Facility level. If no Responsible Officer has been set up as a default at any of these levels then the Responsible Officer for the Booking will be set to the currently logged on user.

Note: The above functionality only applies to Booking Requests lodged via ePathway. In Pathway, the Responsible Officer is always the Receiving Officer (i.e. the Officer taking the Booking) unless manually changed. When changes are made on a Booking Line or to the Activity Type by a different officer from the one who originally took the booking, the Responsible Officer does not get automatically changed. The original Officer remains with the booking unless manually overridden in the case where reassignment of the booking becomes necessary.

Options – Attribute
Selection of this button displays the Activity Type Attribute Maintenance form where Attributes may be assigned to an Activity Type. Attributes need to have already been set up in Parameters in order to be available for selection on this form.

Options – Charge
Charges are able to be recorded against Activity Types where "Allow Fees against Activity Types" has been set ON at the Class parameter. Multiple charges will be created using Fee Codes defined at the Class level. Activity Type Charges function in the same way as Facility Charges.

Selection of the Charge button displays the Activity Type Search Profile and subsequently the Activity Type Charge Maintenance form where Charges may be set up.

Options – Conditions
Selection of this button displays the Activity Type Conditions Maintenance form where Conditions may be set up to apply to an Activity Type.

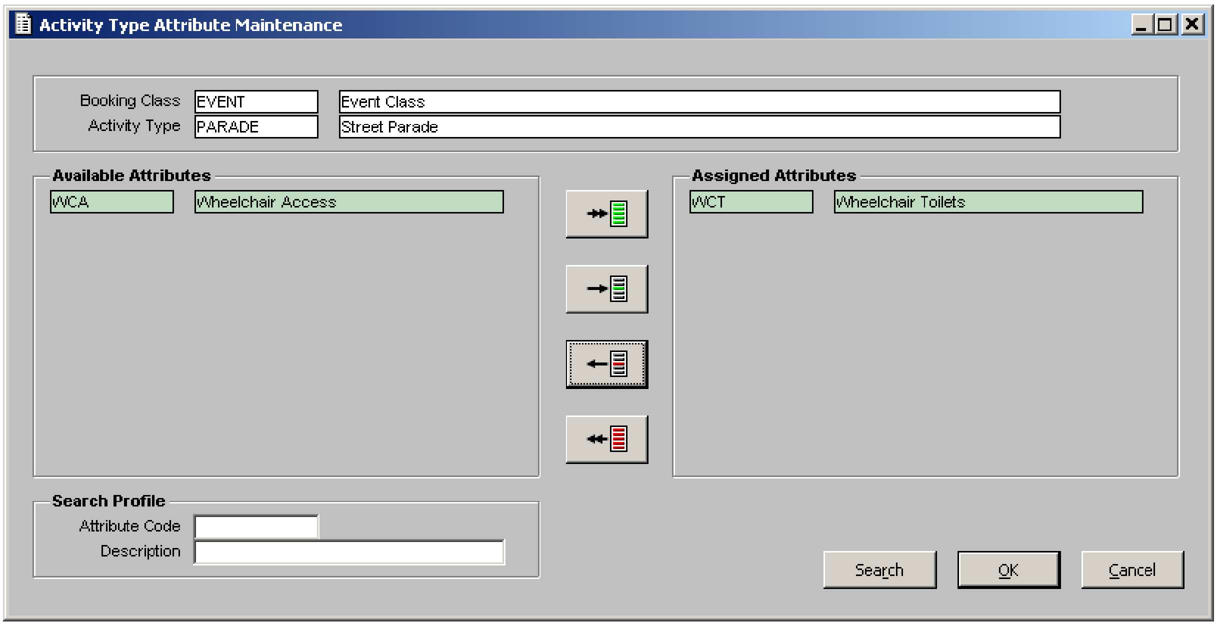
Options – Names
Selection of the Names button displays the Activity Type Name Role Maintenance form where 'Name Roles' are able to be associated with an Activity Type. The Name Roles available for Activity Types are:

- Stakeholder
- Affected Party

Options – Activity Sub-Type
Selection of this button displays the Activity Sub-Type Maintenance form where an Activity Type may be further classified into sub-groups. These Sub-Types will then be available against a Booking.

Activity Type Attribute Maintenance form

The Activity Type Attribute Maintenance form allows existing available Attributes to be assigned to an Activity Type, e.g. Wheelchair Access, Disabled Toilets etc. These Attributes need to have been set up under Attribute Maintenance for the Booking Class.



Activity Type Attribute Maintenance Form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Activity Type

These fields display the selected Activity Type. These fields are display only.

Available Attributes

These fields list the Attribute Code and Description of all the available Attributes which have been set up against the Booking Class. To assign an Attribute to the Activity Type, the Select Button or Select All Button should be used.

Assigned Attributes

These fields list the Attribute Code and Description of all the Attributes which have been assigned to the Activity Type. To un-assign an Attribute or all attributes, focus on the specified Attribute and select the Remove button or alternatively, the Remove All button.

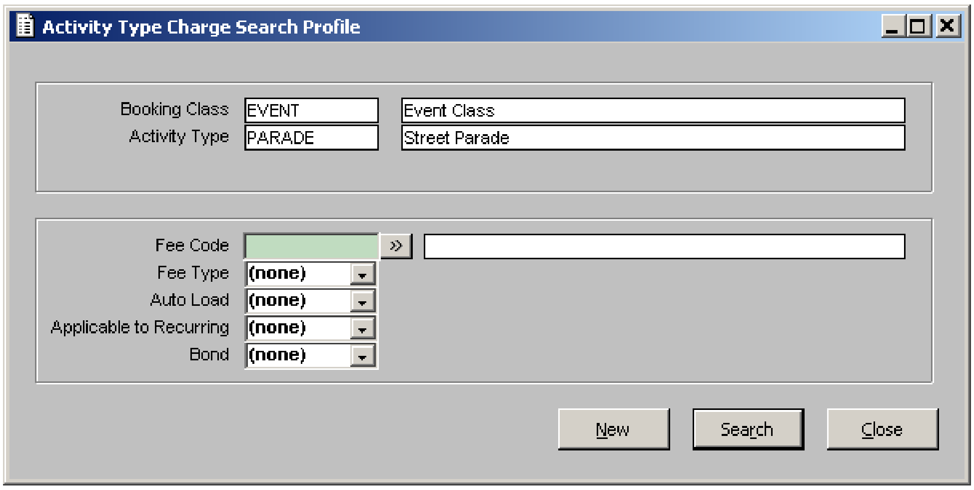
Search Profile – Attribute Code/Description

These fields allow a search profile to be entered to facilitate a search. This is useful when there are more than 9 Attribute Codes to search through.

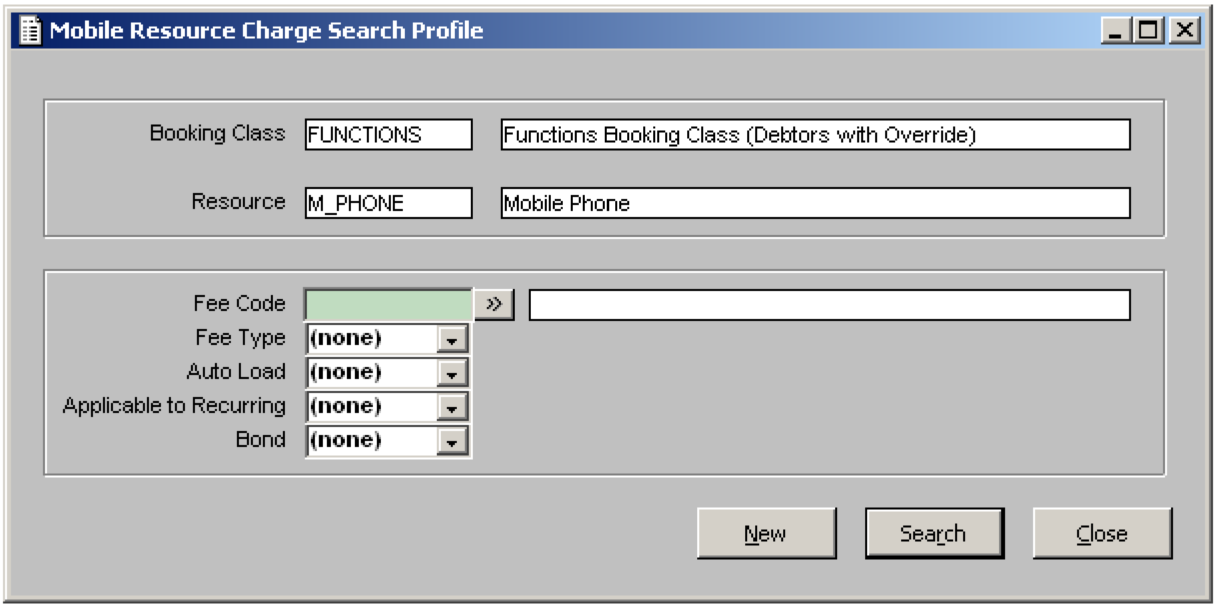
Enter an Attribute Code and/or Description on which to base your search and then select the Search button.

Charge Search Profile Form

This form allows the user to create a new Activity Type (or Facility) Charge or search for an existing one.



Activity Type (or Facility) Charge Search Profile form



Mobile Resource Charge search Profile

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Activity Type

These fields display details of the selected Activity Type, e.g. PARADE, Street Parade. (These fields do not display on the Mobile Resource Search Profile form).

Resource

The Resource field only displays on the Mobile Resource Charge Search Profile form. It allows identification of the Mobile Resource to which the Charge is attached.

Fee Code

This field allows the user to key in a Fee Code on which to conduct a search, or alternatively, select one from the Pop Up. The selected Fee Code details will then display in these fields.

Fee Type

Select a Fee Type from the drop-down list on which to base your search. The available options are:

- (None)

- Fixed
- Daily
- Hourly

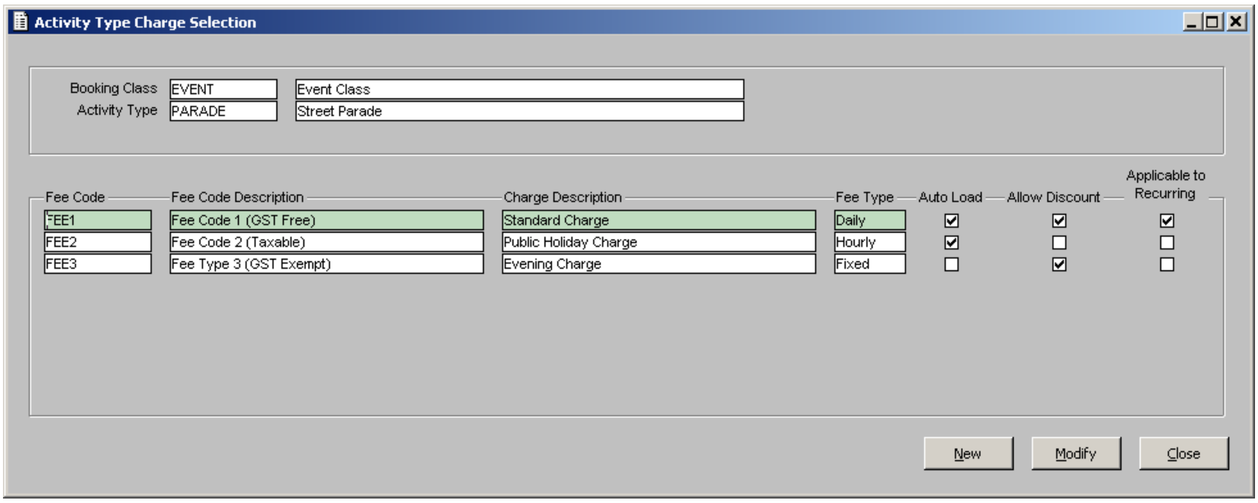
Auto Load
Select an Auto-load criteria from the drop-down list, on which to base your search. The available options are the following, with (None) being the default:
- (None)
- No
- Yes

Applicable to Recurring
Select an ‘Applicable to Recurring’ criteria from the drop-down list, on which to base your search. The available options are the following, with (None) being the default:
- (None)
- No
- Yes

Bond
Select a ‘Bond’ criteria from the drop-down list, on which to base your search. The available options are the following, with (None) being the default:
- (None)
- No
- Yes

Charge Selection Form

The Charge Selection form displays when a search is conducted from the Charge Search Profile. It allows a Charge to be selected for maintenance or a new Charge to be entered. It will display if more than one Charge exists.



Activity Type (or Facility, Resource etc) Charge Maintenance form

Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Activity Type
These fields display details of the selected Activity Type, e.g. PARADE, Street Parade.

Fee Code/Description

These fields display the Fee Code and Description applicable to the Charge, e.g. HIREFEE, Hiring Fee.

Charge Description

This field displays the Description of the Charge e.g. Standard Charge.

Fee Type

This field displays the Fee Type applicable to the Charge e.g. Daily, Hourly or Fixed.

Auto Load/Allow Discount/Applicable to Recurring

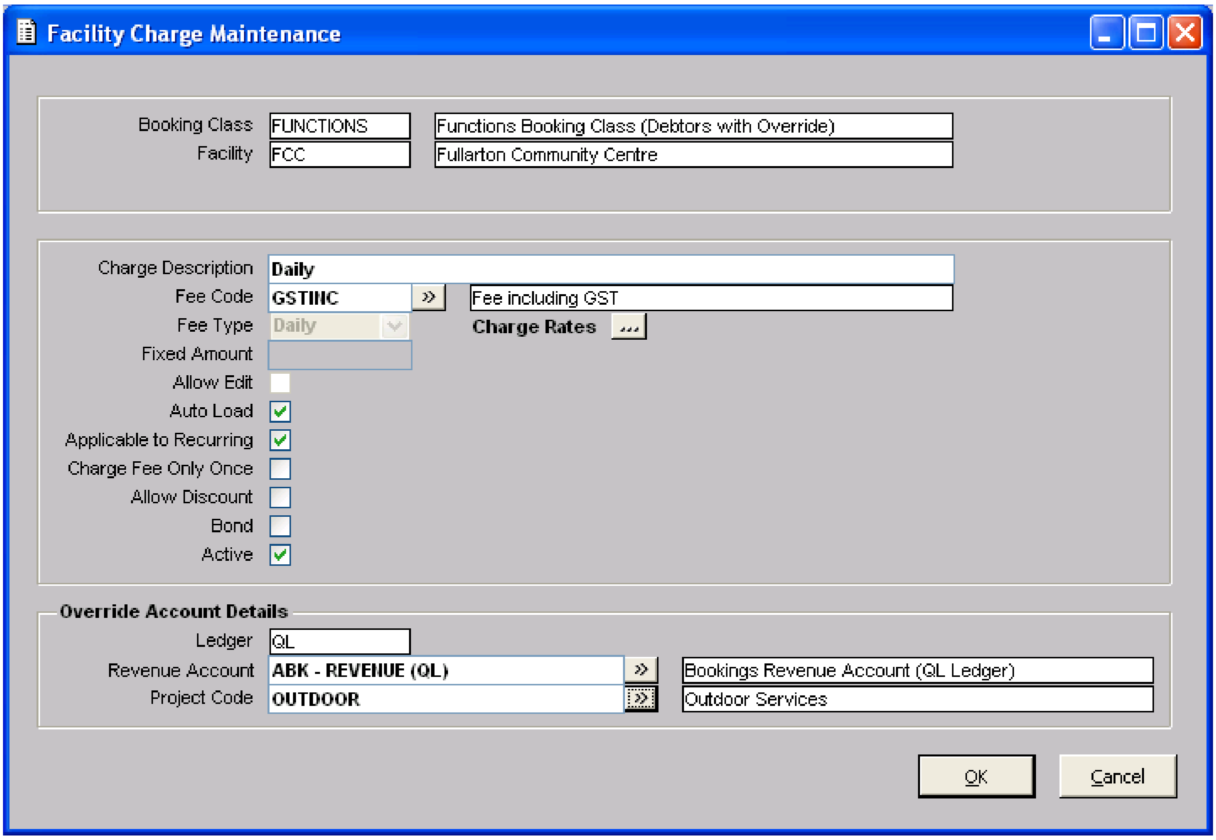
These fields display the settings of the Auto Load, Allow Discount and Applicable to Recurring flags applicable to the Charge. These flags are not maintainable from this form.

Charge Maintenance Form

Charges are able to be recorded against Activity Types, Facilities and Resources where “Allow Fees against Activity Types” and/or “Allow Fees against Facilities” has been set ON at the Class parameter. Multiple charges can be created using Fee Codes defined at the Class level.

Activity Type charges may be defined for each Booking Line. If a Daily Fee Type is selected, then the daily charge rate (based on the parameters) is applied for the Booking Request. (Facility Charges will incur a Daily Charge on each Booking Line unless the ‘Charge Fee Only Once’ flag has been set on.) The Charge Rate is applied for each Day that the Activity is held. No further editing is allowed. If an Activity Type Fixed Charge is applied then it too will be applied to the Booking Request. (A Facility Fixed Charge will be applied to each Booking Line unless the ‘Charge Fee Only Once’ flag is set on.) The Daily Charge rate is more flexible than the Fixed Charge as it allows half day rates and rates for different days of the week. The Charge Rates detail button becomes available where daily charges may be set up.

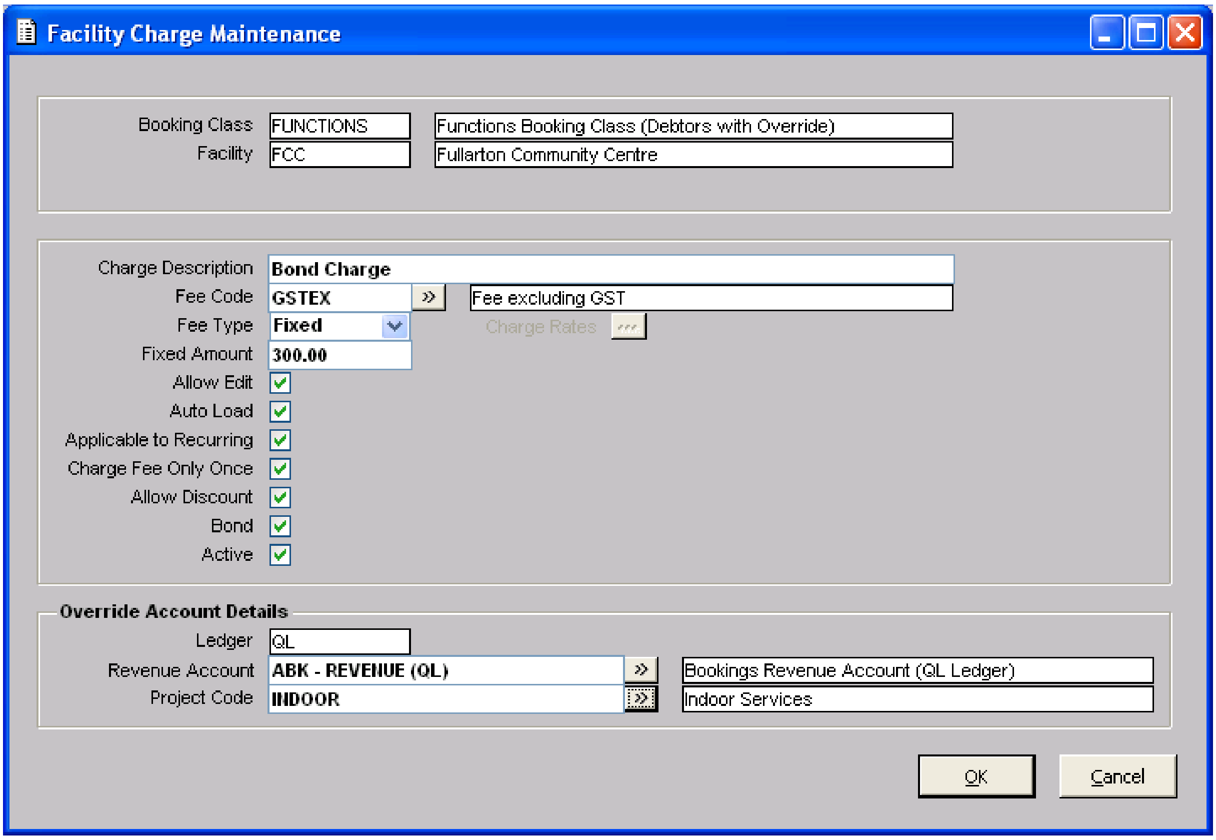
Note: The Fee Code accounts and the Charge Override account must be in the default Debtors Ledger.



Activity Type Charge Maintenance form showing Daily charge

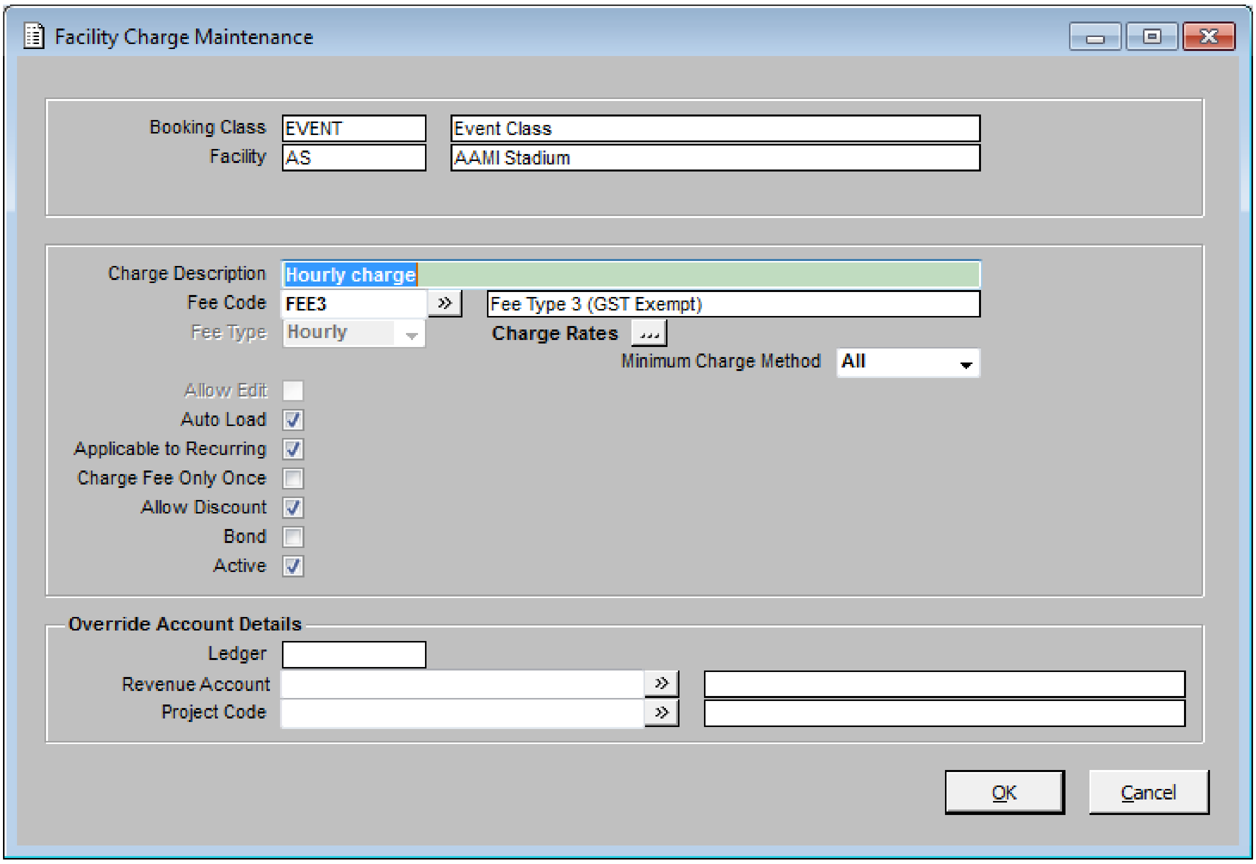
If a Fixed Fee Type is applied to the Activity Type Charge, then an amount needs to be entered in the Fixed Amount field. This Charge will be applied to the Booking Request. The 'Allow Edit' flag becomes available to determine whether access is going to be given to any user (regardless of the Fee Summary authority setting) to change the Fixed Amount of the fee when a Booking is made.

If a Fixed Fee Type is applied to a Facility Charge, then you can defined the time periods for the nominated Facility based Fixed Charges.

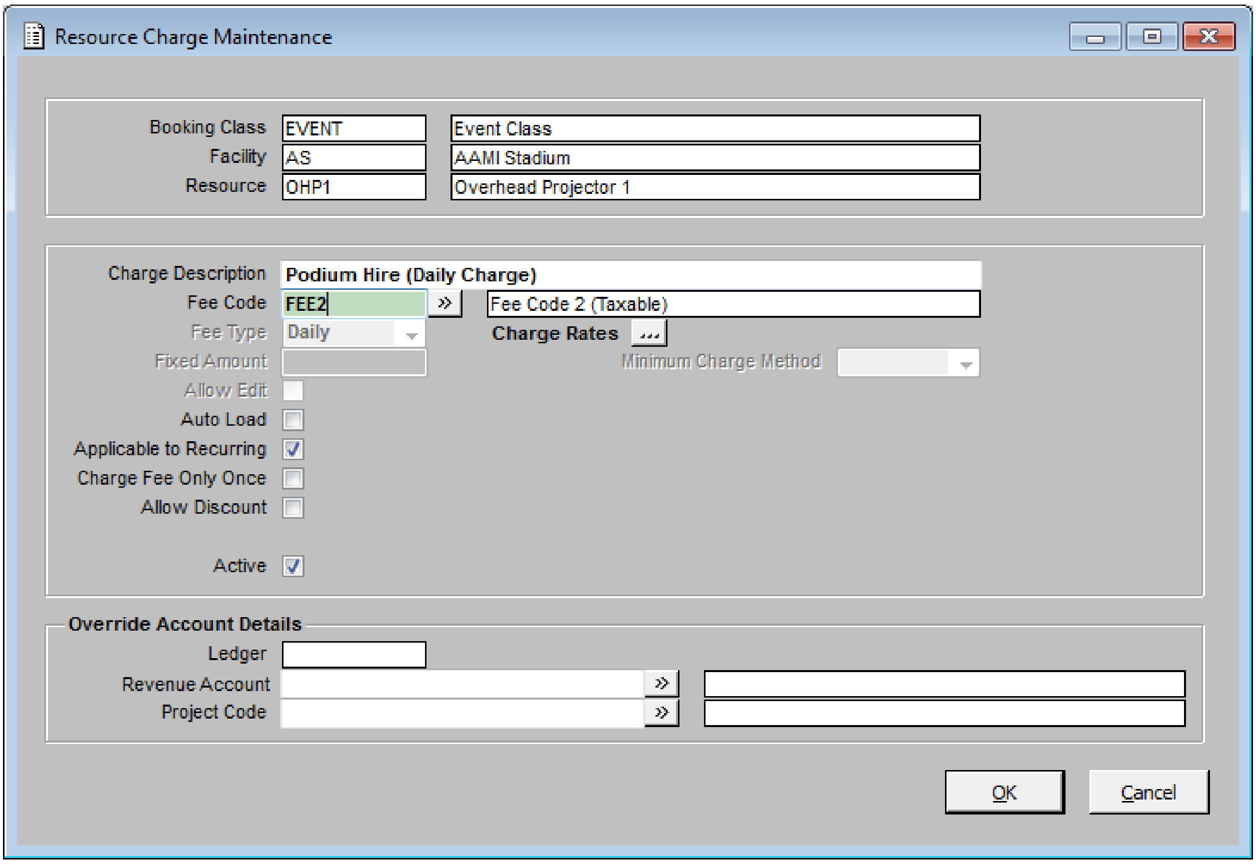


Activity Type Charge Maintenance showing Fixed charge

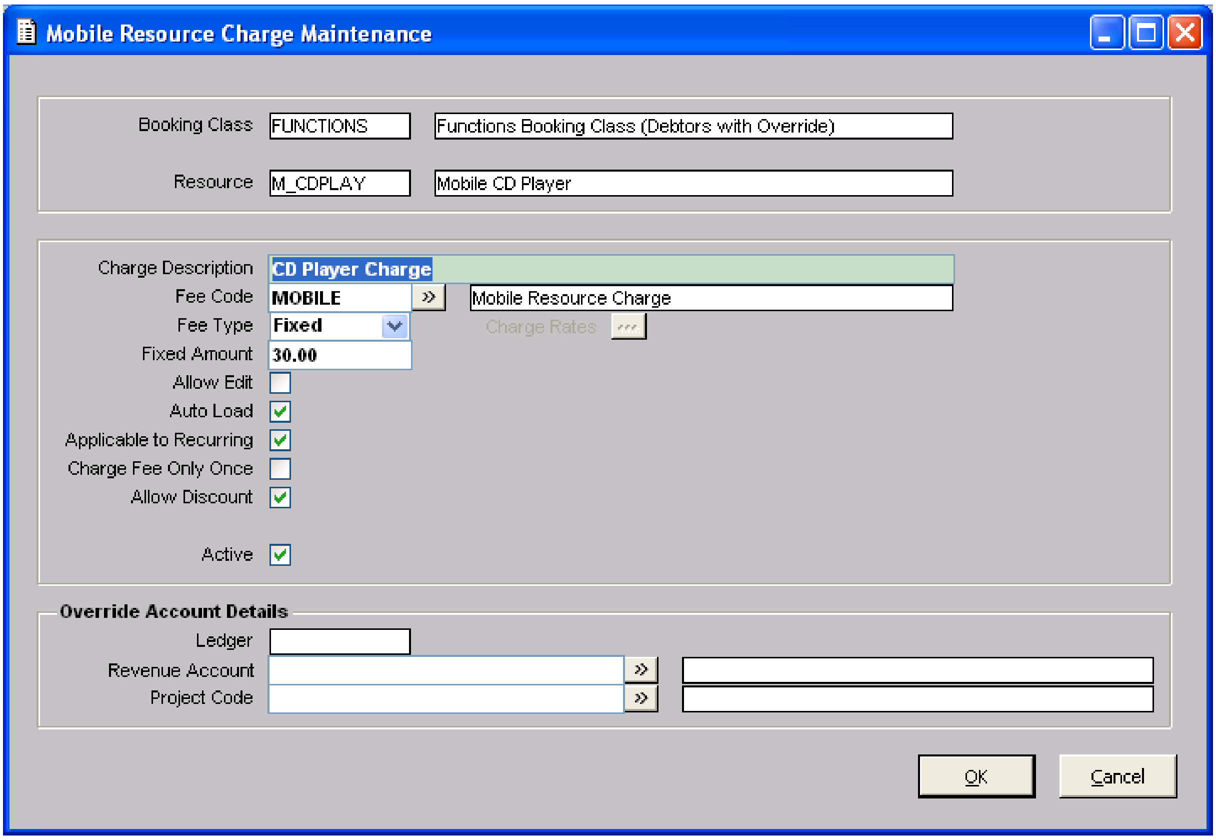
For Facilities and Resources, Daily, Facility and/or Hourly Charge Rates are available and are can be set up, if applicable. The flag ‘Charge Fee Only Once’ ensures that the Fee is charged only once per Booking Request.



Facility Charge Maintenance form showing Hourly charge



Resource Charge Maintenance form showing Daily charge



Mobile Resource Charge Maintenance form showing Fixed Charge

Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Activity Type/Facility

These fields display details of the selected Activity Type/Facility, depending on the type of charge being created or maintained. These fields are display only.

Resource

These fields display details of the Resource to which the Charge is applicable. This field only displays when the Charge is being applied to a Resource.

Charge Description
The Charge Description is a free format text field, with a maximum of 50 characters that allows the user to enter a description of the charge.

Fee Code
The Fee Code may be keyed in or selected from the Fee Codes defined at the Class level. Note that selecting the Fee Code, also determines the Debt Type that is used as this has been set against the Fee Code parameter.

Fee Type
The Fee Type relates to the type of charge. The available options are Fixed, Daily and Hourly. This field is mandatory and defaults to ‘Fixed’.

If **Fixed** is selected (for Activity Types, Facilities and Resources) then the user must enter a value in the “Fixed Amount” field.

When a Fee is a “Fixed Fee” an additional field, “Allow Edit” is made available. If this is set on then any user (regardless of the Fee Summary authority setting) is able to change the Fixed Amount of the fee. This is used where a “Damage” fee is applied to a Booking and the user is required to enter the amount of Damages that the customer will be charged. By default, this value is OFF and the user will be required to set it ON.

If **Daily** is selected for Activity Types, a Daily Fee Type will allow the user to enter an amount in the Charge Rate field, and this amount will apply for the entire duration of the booking, i.e. If a Charge Rate of $100 is specified and the Fee Type is Daily, then for each day on which the Activity is booked a charge of $100 will apply.)

If Daily is selected for Activity Types, Facilities and Resources then the Charge Rates button becomes available where other details may be maintained.

The field, “Maximum Hours for Half Day Rate”, is available. This allows the user to define the maximum number of hours that can elapse to receive the half day rate charge. Once the number of hours has been exceeded then a full day rate will be applied. This field is optional, and will only be used in processing if the user has entered a value. If “Maximum Hours for Half Day Rate” is entered then the user must enter a value in the “Minimum Charge” field. This is used when the number of hours on the booking is less than the Maximum Hours for Half Day Rate.

The calculation of the number of days is calculated based on a 24 hour clock. The user is able to nominate a different daily rate for each day in the week. This allows a different fee to be charged Monday-Friday as opposed to Saturday and Sunday.

> E.g. If a Customer has booked a Hall from Monday 9 am till Tuesday 4 pm, then the number of days will be calculated as 1 day and 7 hours (Monday 9 am till Tuesday 9 am and then the remaining hours). If the maximum number of hours per half day was set at 4 hours then the Customer would be charged for 2 days.
>
> If a Customer has booked a Hall from Monday 9 am till Monday 12 pm, then they will be charged the minimum rate as the number of hours is less than the half day rate.
>
> If a Customer has booked a Hall from Monday 9 am till Monday 8 pm then they will be charged the full daily rate.

If **Hourly** is selected for Facilities and Resources (it does not apply to Activity Types), then each day and time range that has been entered in the Hourly Charge Maintenance form will be defaulted as the dates and times that Hourly charges apply.

Any new Hourly Rates entered by the user will assume that the rate is for 24 hours per day. Users are required to amend the rates as required.

> E.g. The user may set an Hourly Fee Code for hall usage between Monday to Friday 9 am and 5 pm and then assign a different rate for Monday to Friday 5.01 pm till 11:59pm, and a different rate from Saturday 12:00 am till 9 am. In this way the user is able to charge at different rates on the booking based on the time that the Facility is being used.
>
> If there is no cost to use the Facility at certain times then the rate entered is zero dollars. The rate entered is a monetary field. Note that no overlap of hours is allowed when setting these details, i.e. costs will not be able to be defined for 9:00 to 17:00 and then 16:00 to 19:00.

Charge Rates
Selection of the Charge Rates Detail Button will display one of two forms dependent on the Fee Type. If the Fee Type is Daily, then the Daily Charge Maintenance form displays. If the Fee Type is Hourly, then the Hourly Charge Maintenance form will display. If the Fee Type is Fixed, then the Fixed Charge Maintenance form displays. [See Charge Details – Fee Type]

Minimum Charge Method
This flag is only applicable for Facility and Resource based Hourly Fees:

“All” - the minimum charge for each period will be applied separately.

"Lowest" – the lowest minimum charge where multiple periods are involved will be applied.

Fixed Amount
If a Fixed Fee Type is selected then the user must enter a value in the "Fixed Amount" field. The amount is entered in dollars (and cents) and is formatted to 2 decimal places, e.g. 250.00.

Allow Edit
When a Fee is a "Fixed Fee" an additional field, "Allow Edit" will be made available. If this is set on then any user (regardless of the Fee Summary authority setting) will be able to change the Fixed Amount of the fee. This will be used where a "Damage" fee is applied to a Booking and the user is required to enter the amount of Damages that the customer will be charged. By default, this value will be OFF and the user will be required to set it ON.

Auto Load
This field is an On/Off flag. If set to ON then the Charge will automatically be loaded against a new Booking Request. If it is set to OFF then the charge will not be automatically loaded against a Booking Request. The Charge will be available for loading against a Booking Request at a later time, e.g. for late charges, this setting will be OFF and the user will add the charge manually against the Booking Request if required. The Default for this field is set to ON.

Applicable to Recurring
This is an On/Off flag which indicates whether the Charge can be added against a Recurring Booking. If set ON then the Charge is able to be applied to Recurring Bookings. If set to OFF then the Charge will only be able to be added to bookings that are non-recurring. If this flag is set to ON then an additional field, "Charge Fee Only Once" becomes available. By default the value of the Applicable to Recurring Bookings field will be set to ON.

Charge Fee Only Once
This field is an On/Off flag which is available on Facility and Resource Charges where the Charge is applicable to Recurring Bookings, and is always available for Activity Charges. If this field is set ON then the Charge will only be raised once against the Booking Request. Subsequent charges generated for the Booking will not have this charge applied. This flag can be used to control Fees that are to be raised only once, e.g. a Bond.

Allow Discount
This field provides the ability to nominate whether discount can be applied to a Fee. This is an On/Off indicator. When set to ON then discount will be able to be applied against the Fee Code.
Where this field is set OFF then the user will not be able to apply discount to this Fee Code.

Bond
This field is an On/Off indicator. It signifies whether the Fee Cost is a Bond. By default the value of this field will be set to OFF and the user will be required to set this ON.

Override Account Details – Ledger
This field displays details of the Ledger which is used for the Override Revenue Account.

> Note: The Fee Code accounts and the Charge Override account must be in the default Debtors Ledger.

Override Account Details – Revenue Account/Description
The ability to override the Revenue Account against each Facility will be provided. The Revenue Account will default from the Fee Code provided, but it allows an override to occur.

> Note: The Fee Code accounts and the Charge Override account must be in the default Debtors Ledger.

Override Account Details – Project Code

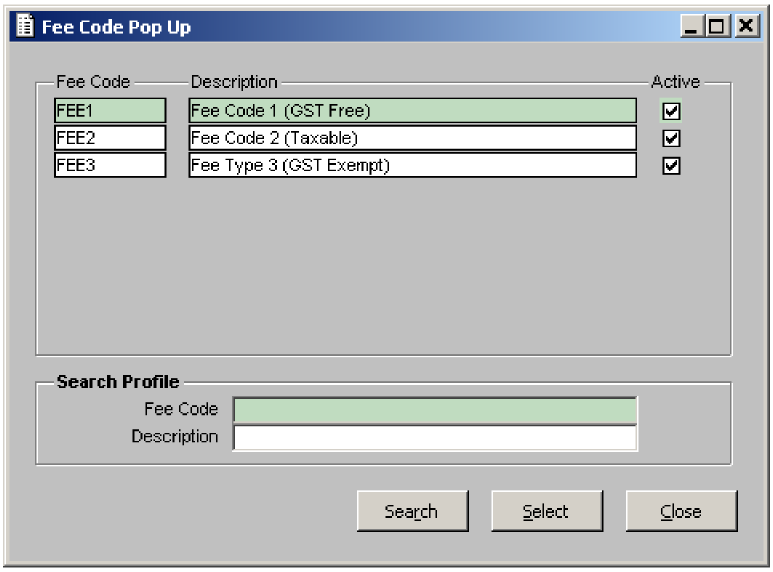
A new Project Code field has been added (in Release 2.21) to allow the assignment of a Project Code against the Charge of a Facility, Sub-Facility, Activity or Resource. Entry of a Project Code will default the Ledger Offset Account, or, if no Offset Account, force entry of an Override Revenue Account at the Charge level. If an Offset Account does exist, the Revenue Account field will then be dimmed, disallowing the Revenue Account from being changed.

If a Booking is raised to either Pathway Debtors or as a Cash Invoice, and there is an Override Project Code at the Charge level (i.e. Facility, Sub-Facility, Activity or Resource), the Project Code will be assigned to the Revenue Transaction.

Note: If a Project Code has been entered at the Fee level, and at the Charge level an Override Revenue Account is nominated but no Project Code at this level, the system will not use the Project Code at the Fee level. Once an entry has been made at the Override level for either the Revenue and/or Project Code, the system will retrieve the information from here.

Fee Code Pop Up Form

The Fee Code Pop Up form displays when the Fee Code Pop Up button is selected from the Activity Type Charge Maintenance form as well as other related forms. It lists the Fee Codes which have been set up and makes them available for selection.



Fee Code Pop Up form

Fee Code/Description

These fields display details of the Fees that have been set up. This consists of a Fee Code and a Description, e.g. TAXFEE, Fee with Tax.

Active Indicator

The Active flag is not maintainable from this form. It is display only and indicates whether or not the Fee displayed is available for use. It is not maintainable from this form.

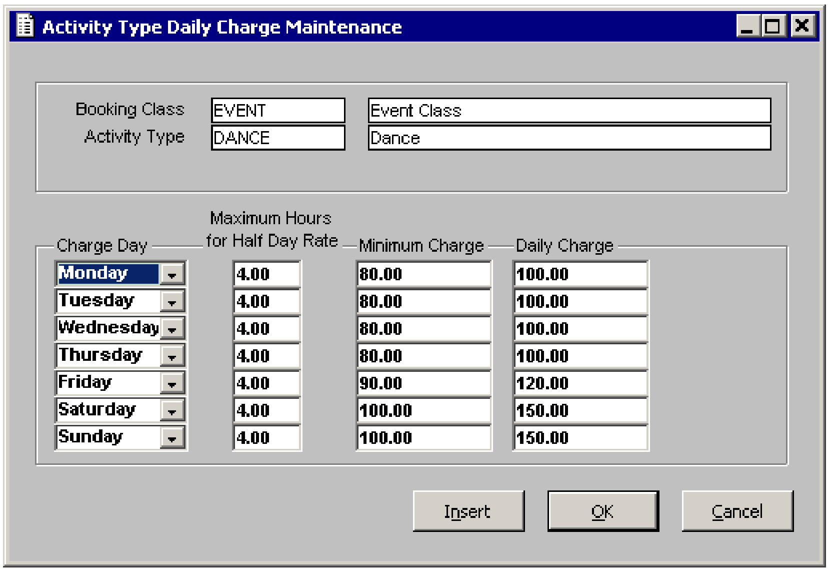
Search Profile – Fee Code/Description

These fields allow a search profile to be entered to facilitate a search. This facility is useful when there are more than 9 Fee Codes to search through.

Enter a Fee Code and/or Description on which to base your search and then select the Search button.

Activity Type Daily Charge Maintenance form

The Activity Type Daily Charge Maintenance form displays when the *Daily* Fee Type is selected on the Activity Type Charge Maintenance form. It allows Daily Charge parameters to be set up. [See Charge Details – Fee Type.]



Activity Type Daily Charge Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Activity Type

These fields display details of the selected Activity Type to which the charges apply, e.g. PARADE, Street Parade.

Charge Day

This field allows a Day of the Week to be selected from the dropdown, during which the Fee Charges will apply.

Maximum Hours for Half Day Rate

This field allows the user to define the maximum number of hours that can elapse in order to receive the half day rate charge. Once the number of hours has been exceeded then a full day rate will be applied.

This is an optional field, and is only used in processing if the user has entered a value. If “Maximum Hours for Half Day Rate” is entered then the user must enter a value in the “Minimum Charge” field. This is used when the number of hours on the booking is less than the Maximum Hours for Half Day Rate value.

The calculation of the number of days is calculated based on a 24 hour clock. The user is able to nominate a different daily rate for each day in the week. This allows a different fee to be charged Monday-Friday as opposed to Saturday and Sunday.

> E.g. If a Customer has booked a Hall from Monday 9am till Tuesday 4 pm, then the number of days will be calculated as 1 day and 7 hours (Monday 9 am till Tuesday 9 am and then the remaining hours). If the maximum number of hours per half day was set at 4 hours then the Customer would be charged for 2 days.

If a Customer has booked a Hall from Monday 9am till Monday 12pm, then they will be charged the minimum rate as the number of hours is less than the half day rate.

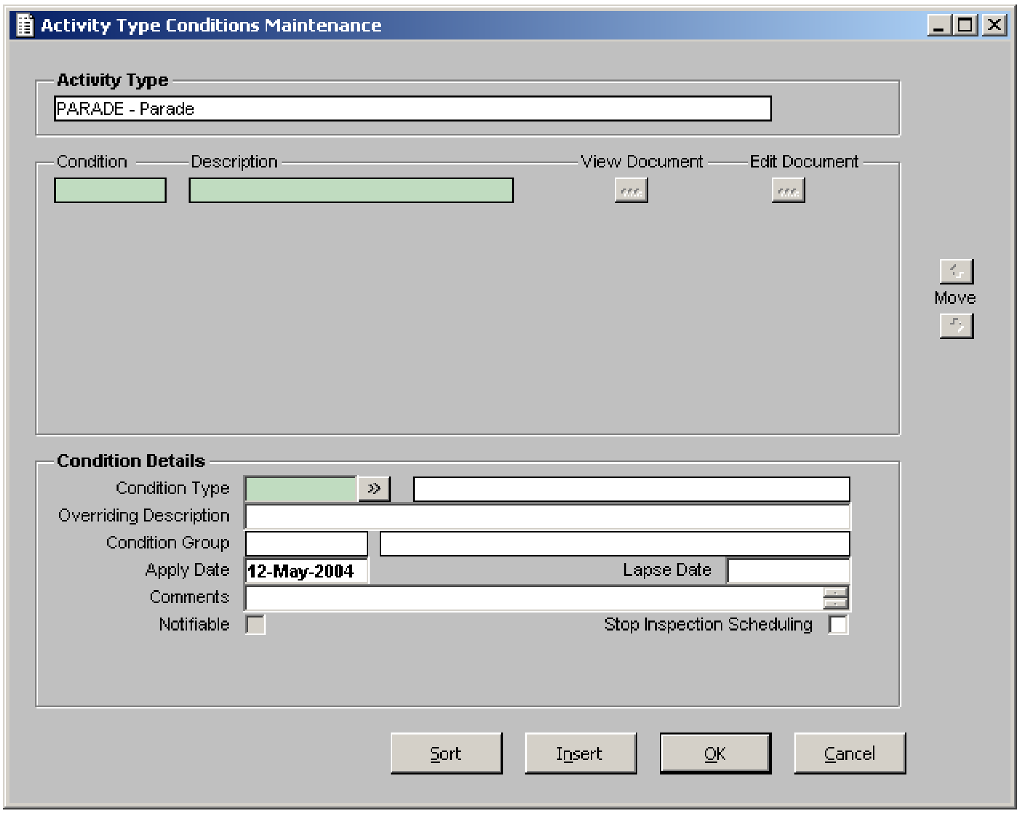
If a Customer has booked a Hall from Monday 9am till Monday 8pm then they will be charged the full daily rate.

Minimum Charge
If "Maximum Hours for Half Day Rate" is entered then the user must enter a value in the "Minimum Charge" field. This is used when the number of hours on the booking is less than the Maximum Hours for Half Day Rate. This is a numeric field which is formatted with 2 decimal places.

Daily Charge
The user will be able to nominate a different daily rate for each day in the week. This is a numeric field which is formatted with 2 decimal places.

Activity Type Conditions Maintenance Form

The following form displays when the Conditions button is selected on the Activity Type Maintenance form. It allows Conditions to be associated with an Activity.

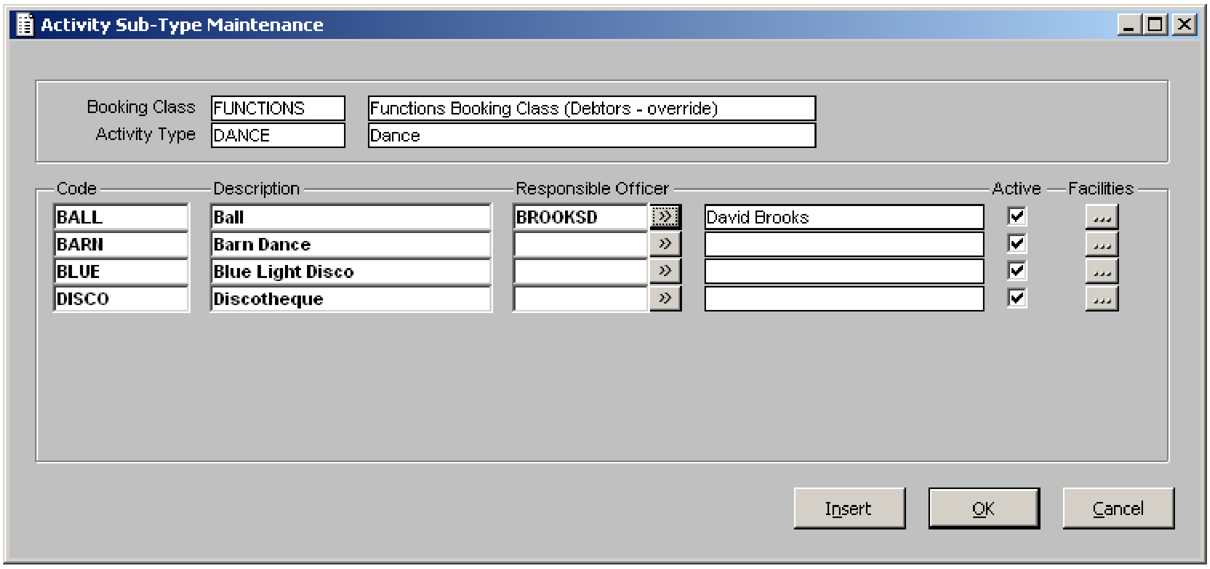


Activity Type Conditions Maintenance form

Activity Sub-Type Maintenance form

Activity Sub-Types allow an Activity Type to be further classified. Many Sub-Types may be defined against an Activity Type. These sub-types will be available against a Booking.

Note: At least one Sub Type will need to be defined and will be required to be active.



Activity Sub-Type Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Activity Type

These fields display the details of the Parent Activity Type, e.g. PARADE, Street Parade.

Code/Description

The Sub-Type Code and Description fields allow a 10 character Code and a 50 character Description to be entered to represent the Activity Sub-Type.

Responsible Officer

The Responsible Officer field allows Council to have greater control over which Responsible Officer is to be nominated for a Booking. This is especially important for Bookings made via ePathway where a specific person within Council needs to be allocated responsibility. If a Responsible Officer is set up at the Activity Sub-Type level, then it will override a Responsible Officer which has been set up at the Activity Type level. If a Facility nominated for the 'first' Booking Line has a default Responsible Officer, then this Officer will override any that already exist on a Booking. Additionally, the Responsible Officer set up at the Sub-Facility level will override one set up at the Facility level. If no Responsible Officer has been set up as a default at any of these levels then the Responsible Officer for the Booking will be set to the currently logged on user.

Active Indicator

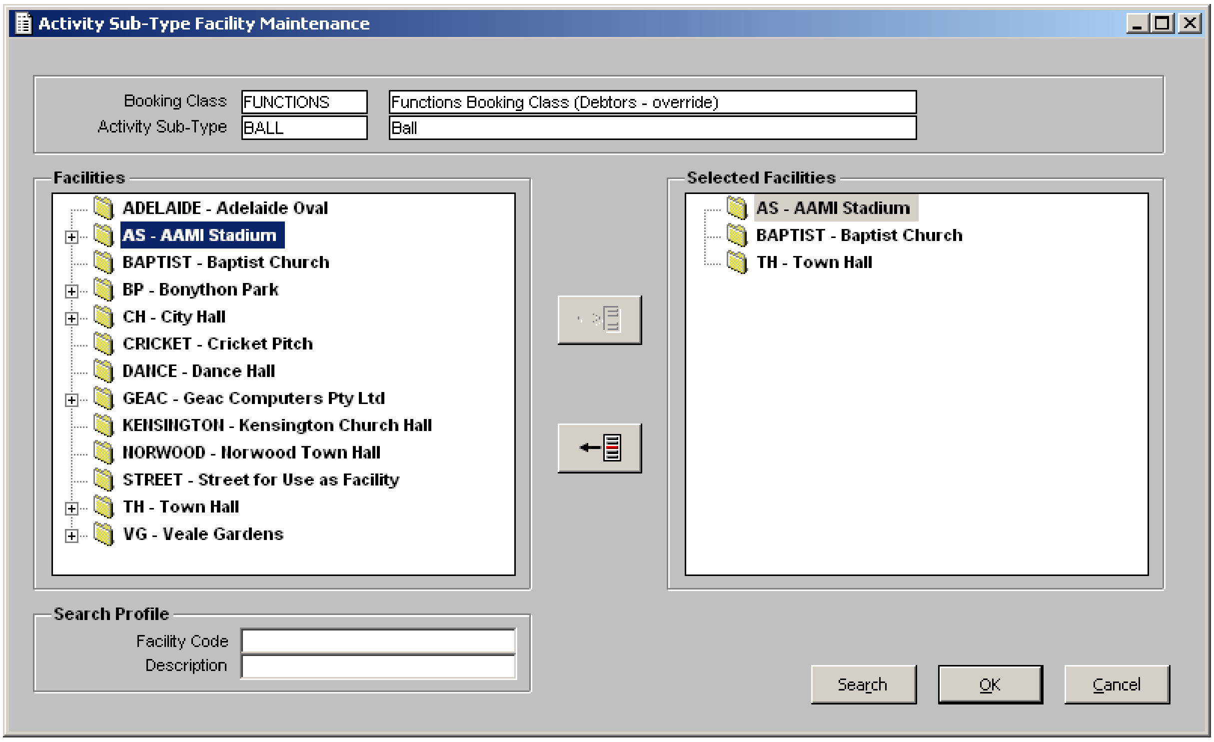
This is an On/Off indicator that determines whether the Activity Sub Type can be selected when a Booking is being made. This defaults to ON. If the Active Indicator is set OFF then new Booking Requests will not be able to use the Sub Type classification.
At least one Sub Type will need to be defined and will be required to be active.

Facilities Detail Button

Selection of the Facilities detail button displays the Activity Sub-Type Facility Maintenance form. This form allows Facilities to be associated with Activity Sub-Types to facilitate searching for and selecting relevant Facilities both in Pathway and ePathway Booking Maintenance.

Activity Sub-Type Facility Maintenance form

The Activity Sub-Type Facility Maintenance Form is accessed by selecting the Facilities detail button on the Activity Sub-Type Maintenance form. It allows the user to select (or remove) Facilities to associate with an Activity Sub-Type.



Activity Sub-Type Facility Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Activity Sub-Type

These fields display details of the selected Activity Sub-Type e.g. BALL, Formal Ball

Facilities

The Facilities box lists the available Facilities and Sub-Facilities in a tree-like structure. Selection of a Facility or Sub-Facility may be made by focusing on the required record and using the Select button to add an occurrence to the right hand side (Selected Facilities). (Note: This action does not remove the occurrence from the LHS.)

Selected Facilities

The Selected Facilities box lists the Facilities and Sub-Facilities which have been selected from the Left Hand Side (Facilities) via the Select button. If a Facility is no longer required to be associated with an Activity Sub-Type then it may be removed to the Left Hand Side using the Remove button. (Note: This action removes it from the RHS of the form.)

Search Profile

These fields allow a search profile to be entered to facilitate a search. This is useful when there are more than 9 Facility Codes to search through.

Enter a Facility Code and/or Description on which to base your search and then select the Search button.

Name Role Maintenance

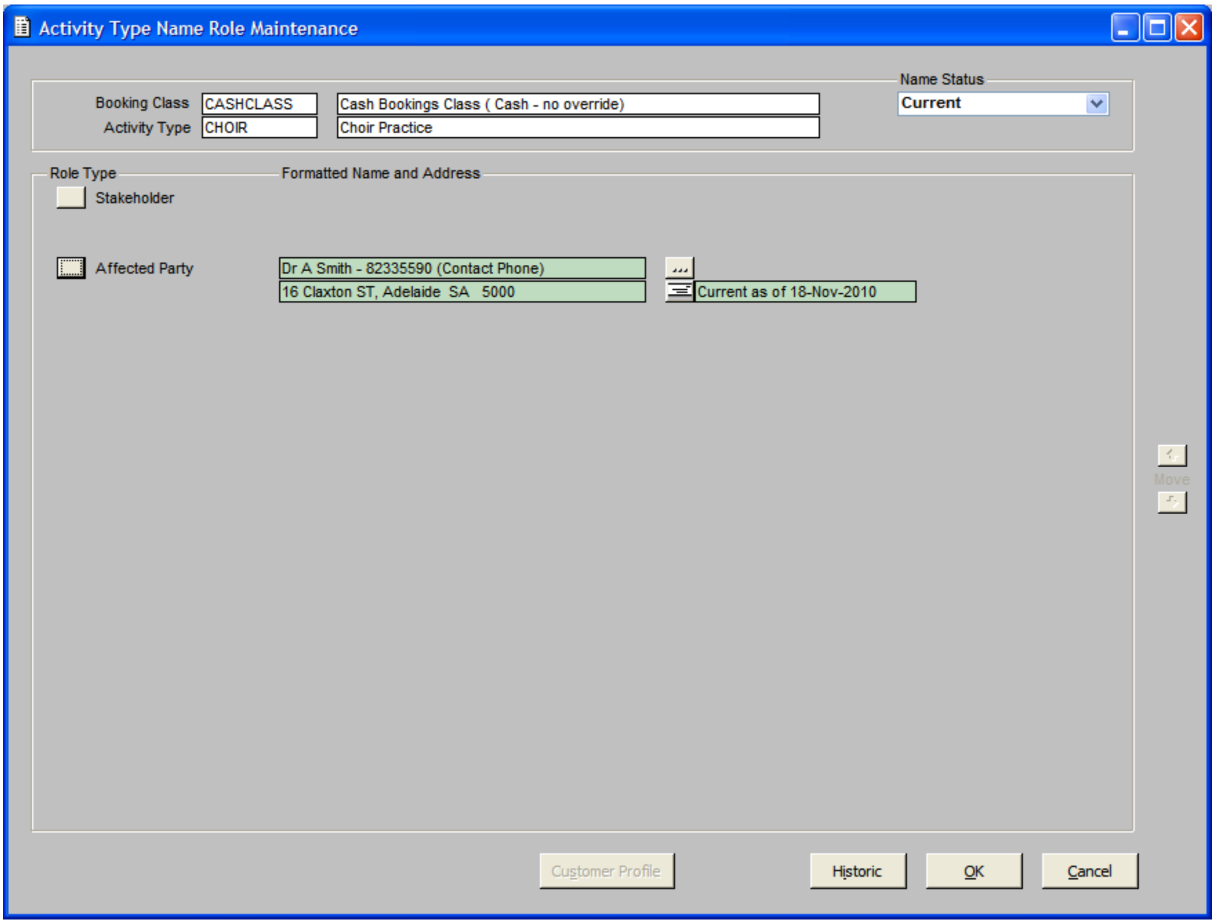
A number of "name roles" are able to be associated with an Activity Type, a Facility or a Booking Request. Different Name Role are provided for Activity Types and Facilities. The user is able to historicise a Name using the Historic button. Current and Historic Names are able to be displayed separately or together. The Name Role function uses the standard Name and Address interface to link names to Activity Types, Facilities and Booking Requests.

Note: Any Names linked to an Activity Type, Facility or Sub-Facility are carried through to the Booking Request when that Activity Type, Facility or sub-Facility is used in a Booking Line.

Activity Types
The name roles that are provided for Activity Types are Stakeholders and Affected Parties:

Stakeholders
This option allows the selection of one or more persons from the Name and Address Module to be associated with the Activity Type. Stakeholders will be added against a Request when a booking is made for the Activity Type. Stakeholders are added where authorisation is required as part of processing the Activity, e.g. Police approval, liquor license approval etc.

Affected Parties
This option allows the selection of one or more persons from the Name and Address Module to be associated with the Event Type. Affected Parties will be added against a Booking Request when a booking is made for the type of event. Affected Parties are added when notification of the Booking needs to be supplied but authorisation is not required.



Activity Type Name Role Maintenance form

Facilities

A number of “name roles” are able to be associated with a Facility. The name roles that are provided for Facilities are Stakeholders, Affected Parties, Facility Owner, Facility Manager and Contractor.
See Activity Type Name Role Types.

The following Name Role Types are provided:

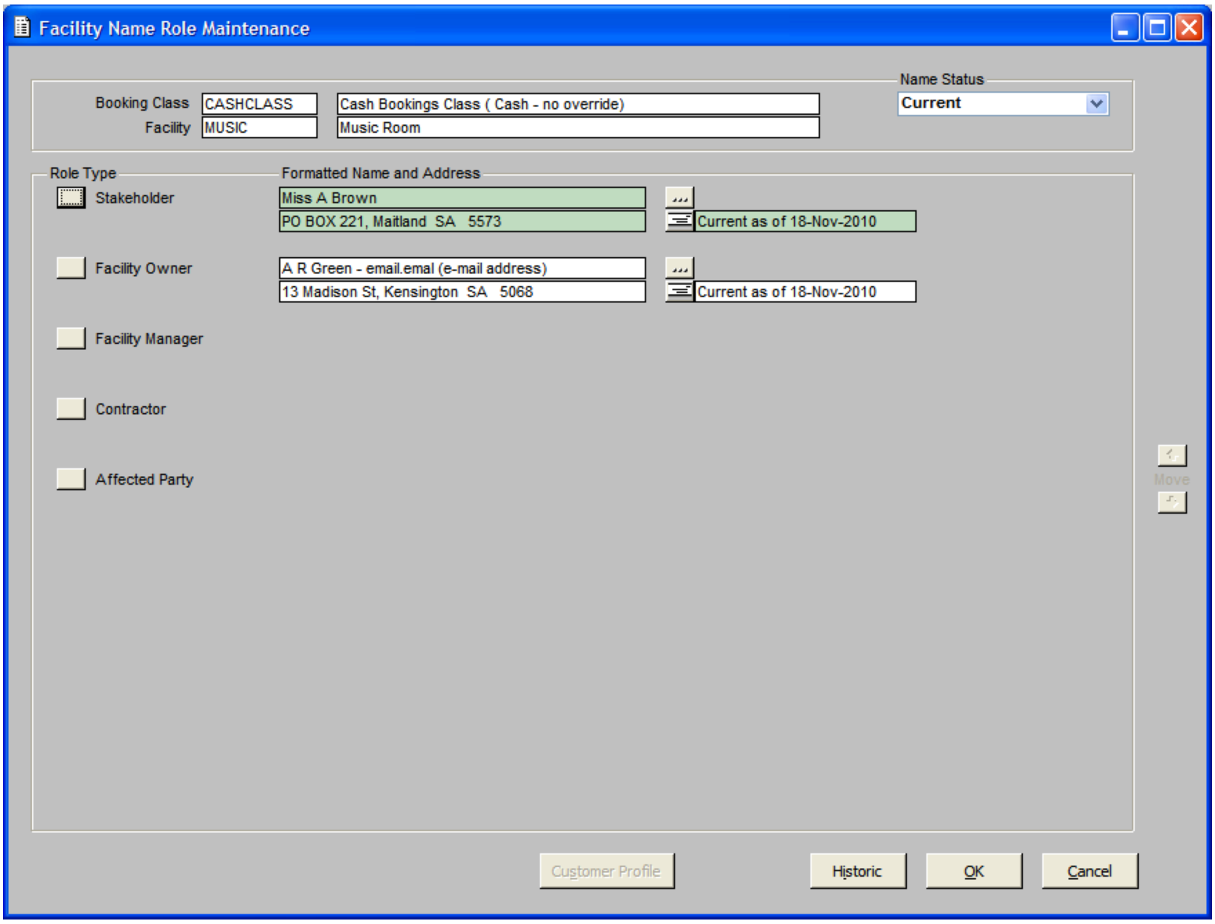
Facility Owner
This Role Type represents the Owner of the Facility. This can be selected from the list of available users from Pathway or from the Name and Address module if the Owner is a contact outside of council. If the Name and Address Module is used, then the process to update the Facility Owner to a new name will involve the user historicizing the Facility Owner and selecting the appropriate name from the Name and Address module. In this way, users will be able to see the history relating to the Facility Owner.

Facility Manager
This represents the Manager of the Facility. This can be selected from the list of available users from Pathway or from the Name and Address module if the Manager is a contact outside of council.

Contractor
This represents the Contractor of the Facility. This can be selected from the list of available users from Pathway or from the Name and Address module if the Contractor is a contact outside of council.

Stakeholder
This option allows the user to select one or more persons from the Name and Address Module to be associated with the Facility. A Stakeholder is a person that is required to be notified of the Booking and provide approval for the Activity to be held.

Affected Parties
This option allows the selection of one or more persons from the Name and Address Module to be associated with the Facility. Affected Parties are added against a Booking Request when a booking is made against the Facility if they are not already linked to the Request. For example Police, other community groups etc. Affected Parties represent people that need to be informed that a particular type of Activity is being held. They are people who are not required to provide authority of the Activity to be held.
(See Activity Name Role Types)



Facility Name Role Maintenance form

Booking Requests

When this form is used for a Booking Request, additional Role Types become available. An additional Name Role Type has been provided called “Contacts”. This is an optional link that allows the recording of any additional contact names for the Booking. This is useful where the Customer and the Contact person for the Booking are not the same person.

The following Name Role Types are available to link to a Booking Request:

<u>Customers</u>
The Customer Name will display and the user will be able to add additional Customers if required. For each Customer, the Debtor details will be able to be displayed. The user is able to change the Debtor details for each Customer as required.

When the “Customer” Names are displayed, the screen also displays the Debtor linked to the Customer. The user is able to change the Debtor that is linked to the Customer from this screen. The user is able to select or create a Debtor by the Debtor Type. The ability to drill out to Debtor Enquiry, based on appropriate authority, is also available.

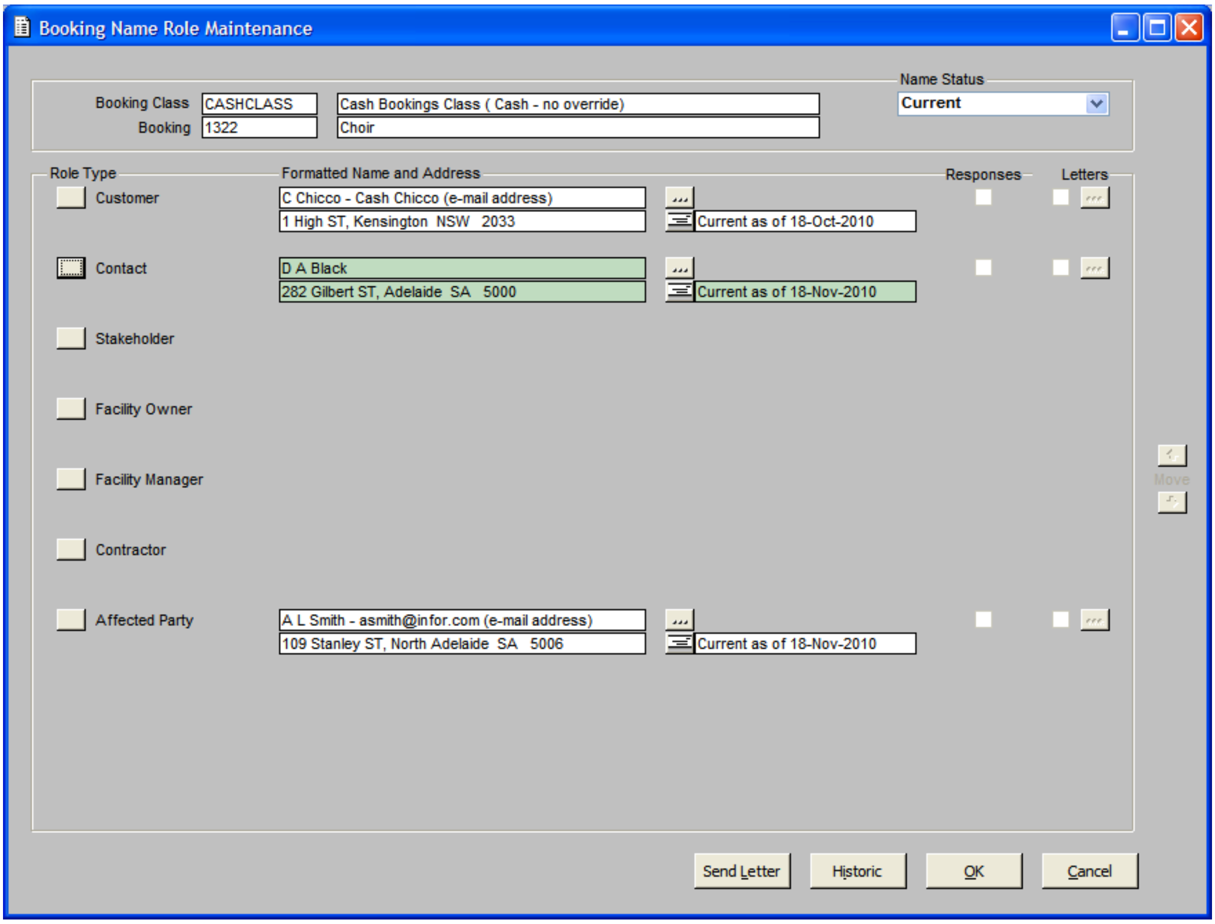
<u>Stakeholders</u>
Stakeholders will display on the Names maintenance screen and allow the user to add and remove Stakeholders as required. Stakeholders will automatically be added based on the Stakeholders recorded on the Facility or Activity Type for the Request.

<u>Contacts</u>
Contacts will display on the Names Maintenance screen and the user will be able to add additional contacts as required. .

<u>Affected Parties</u>

Affected Parties will be added based on the Affected Parties recorded against the Facility or Event Type that has been added to the Booking Request. The user will have the option of adding additional Affected Parties using the Name and Address Interface.

Any documents that have been issued against a name link on this screen will be accessible. The user is also able from this screen to create documents to issue to the names linked to the Request.



Booking Name Role Maintenance form

Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Name Status
The Name Status field allows the user to select a Status for the display of Names. The available options are:

- Current
- Historic
- Current & Historic

Activity Type
These fields display details of the selected Activity Type. These fields are display only.

Role Type
The Role Type button enables the user to add a new Name. Clicking the button displays the Name Search Profile where a name may be searched and selected.

Formatted Name and Address

These fields display the formatted Name and Address details as well as the Status and Status Dates. Selection of the Detail Button displays the Name Maintenance form with all the details relating to the Name. Clicking the ‘envelope’ button displays the Mailing Address Enquiry form.

Debtor ID

When the “Customer” Names are displayed, the screen also displays the Debtor linked to the Customer. The user is able to change the Debtor that is linked to the Customer from this screen. The user is able to select or create a Debtor by the Debtor Type. The ability to drill out to Debtor Enquiry, based on appropriate authority, is also available.

Responses/Letters

Any documents that have been issued against a name link on this screen are accessible. The user is able to create documents to issue to the names linked to the Request from this screen as well as record any Responses received.

Customer Profile button

When focus is on a Customer Role Type the Customer Profile Button may be selected to display or maintain the Customer Profile details for the selected name.

Send Letter button

Selection of the Send Letter button displays the Booking Document Generation form where the user may create a letter to send to any Name Role link on this form. Highlight the required name and then select the Send Letter button.

The user is able to multi-select a number of names and issue a letter. The option to “concatenate” names of the same name role type is available and allows the user to determine whether a single letter should be produced or whether multiple letters will be produced.

Historic Button

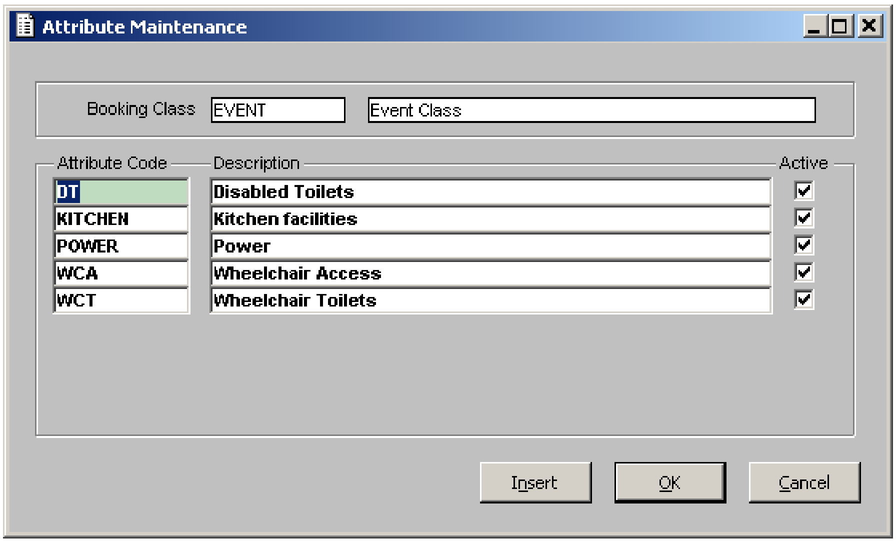
The Historic button allows Name links to be made historic. Highlight the required name and select the ‘Historic’ button.

Attributes

Attributes allow the user to define the type of attributes against a Facility. For example attributes could be Wheelchair Access, Disabled Toilets, Stage, Kitchen, Power etc. Attributes are then able to be defined against a Facility so that users will be able to search for and detail on Facilities for which the Attributes are available. One or more Attributes are able to be defined against a Facility or Activity Type.

Attribute Maintenance Form

The Attribute Maintenance form allows the user to define Attributes for a Booking Class which can be assigned to a Facility or an Activity Type.



Attribute Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Attribute Code/Description

These fields allow a code and a description to be entered for the Attribute. The Code field allows 10 characters to be entered and is a mandatory field. The Description field allows 50 characters and is also mandatory.

Active Indicator

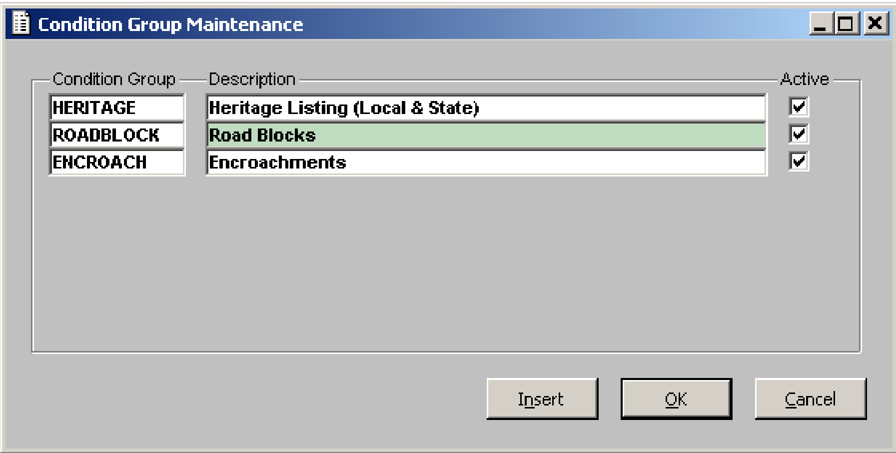
This flag indicates whether the Attribute is available to be associated against a Facility or Activity Type. This is an On/Off indicator which defaults to ON.

Conditions

The Conditions System is a core application that provides the ability to create and modify information associated with condition documents. Any documents linked to Condition Types may be viewed or edited. Conditions may be created for a Booking Class and associated with Activity Types and Facilities within that Class.

Condition Groups and Types

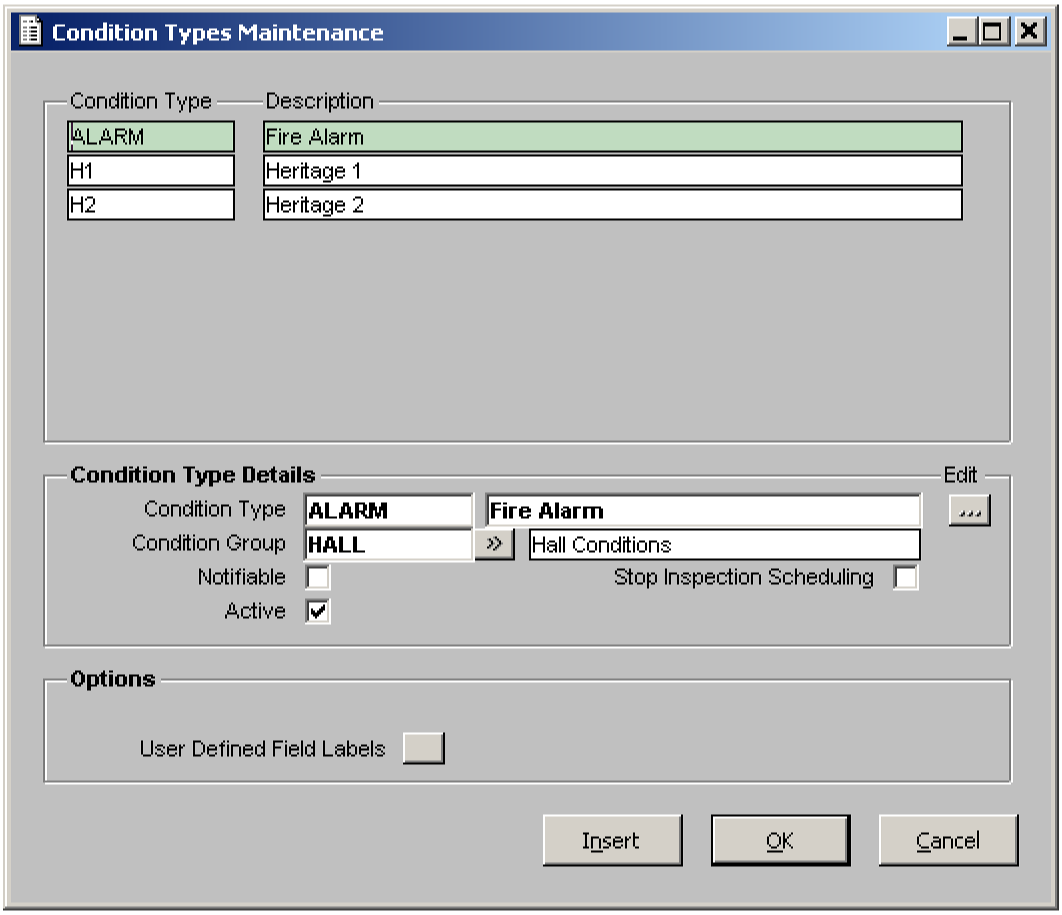
Condition Groups enable the categorisation of Condition Type details, within each module. Condition Types may be grouped under only one Group heading if required



Condition Group Maintenance Form

Conditions Types may be defined for the Class, e.g. for all Hall Types a condition may be that any costs related to a Fire Alarm activation is the responsibility of the Customer. This Condition would be defined once and then be able to be associated to as many Facilities as required. Conditions are defined using the standard Pathway Conditions module and make use of the functionality currently provided.

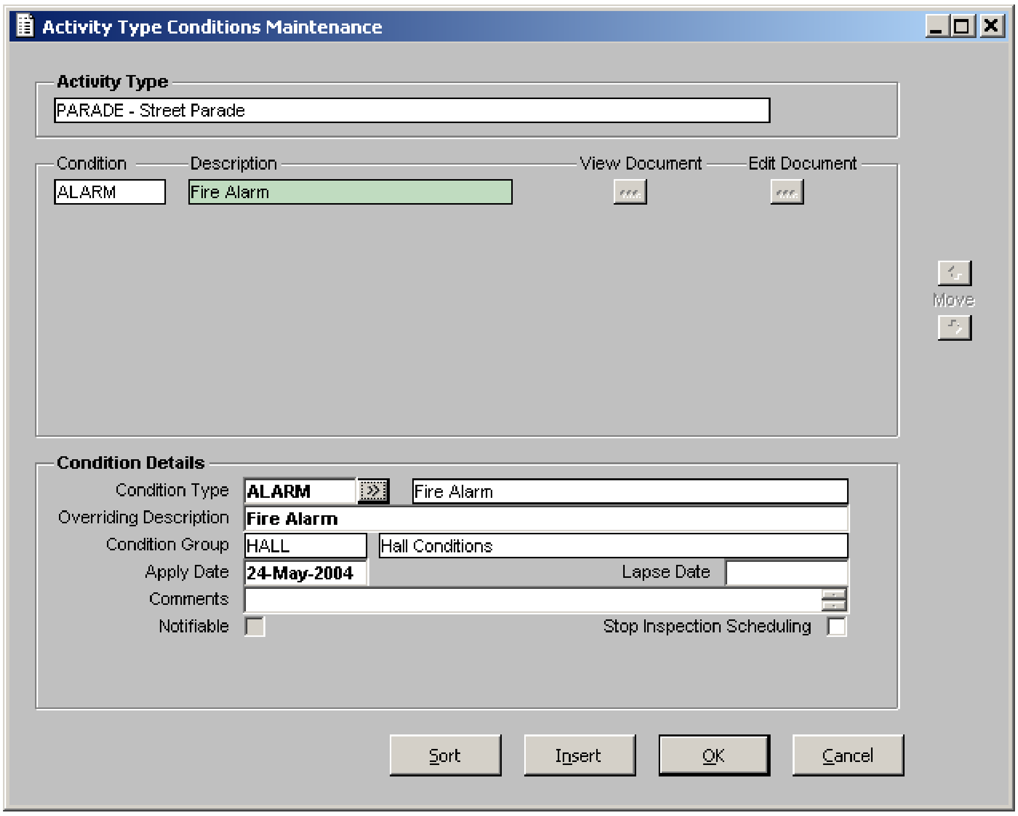
Where Notifiable Conditions exist against a Facility or Activity Type, these will automatically display when a Booking Request is viewed and the relevant Facility or Activity Type exists against the Booking Request. Notifiable Conditions will also be displayed when the Facility or Activity Type is added against a Booking Request.



Condition Types Maintenance form

Conditions Maintenance

Conditions may be attached to Activity Types, Facilities and Sub-Facilities. The header details display the Activity Type, Facility or Booking to which the Condition is attached.



When an Activity Type and Sub-Type are added to a Booking Request, any Conditions attached to the Activity Type or Sub-Type will be copied to the Booking Request. The 'Apply From Date' on the Condition will be set to "Today". If the Activity Type is removed, the Conditions will also be removed from the Booking Request. The Conditions checkbox will also become unchecked.

If a Condition pertaining to an Activity Type is the same as one pertaining to a Facility on a Booking Request then it is only added once to the Booking Request.

Additional Notes regarding Conditions
Conditions are not 'linked' to a Facility or Sub-Facility in the same way that Names or Locations are. In the case of a Condition, the data that defines the Condition is stored on the link itself. So in order to determine if a Condition is the 'same as' or 'different from' the Parent and Sub-Facility, the process has to actually compare the data from the Condition. This includes the Description and Comment fields, but excludes the Apply Date and Lapse Date. This is because the Apply Date is always set to 'Today' whenever a Condition is added. With this in mind, if we used the Apply date in comparing Conditions, they would almost always appear to be 'different'. Therefore the Date fields are excluded. If a Condition is 'copied' from a Parent Facility to a Sub-Facility, and remains unchanged on the Sub-Facility, any subsequent maintenance of that Condition on the Parent would be copied to Sub-Facility. However, if the Condition was modified on the Sub-Facility, say the Comment field was changed, then any subsequent 'Merge' operation would create another Condition using the original data from the Parent.

Note: If you modify one of the automatically added Conditions, e.g. change the 'Description' or 'Comments' field, then the Condition will no longer be removed if you change the Activity Type or Facility from which it came. However, changing the 'Apply From Date' or 'Lapse Date' will not prevent the Condition from being removed (as these fields are not used in the comparison when determining if a Condition on the Booking Header matches a Condition on the Activity Type or Facility because they will always be different with the 'Apply From Date' being set to the Current Date when the Condition is added.)

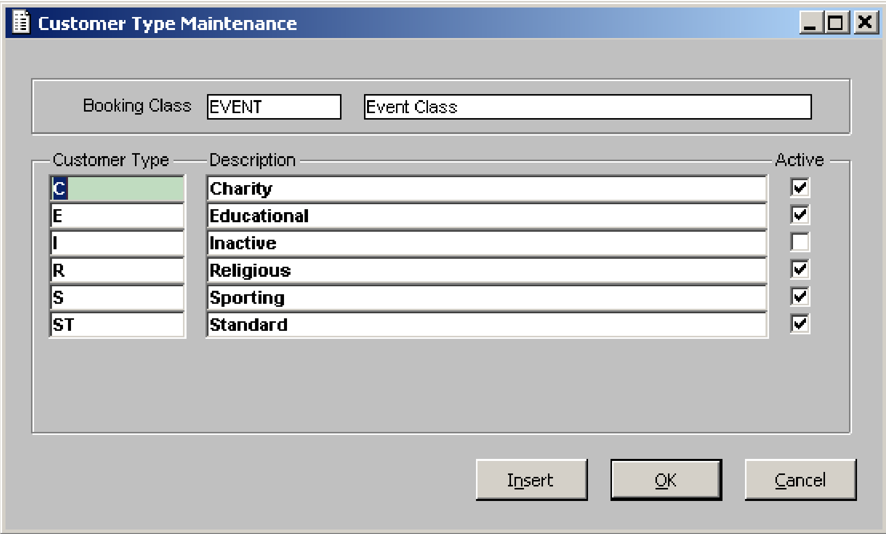
Note: When removing a Facility, the Conditions for that Facility will only be removed if the same Facility does not occur elsewhere on the Booking.

Customer Type

A Customer Type is used to define the type of Customer making the Booking, e.g. Business, Community, Religious Group, Charity etc.

Customer Type Maintenance Form

This option allows the user to define a list of options that classifies the customer doing the hiring. Details that may be recorded for this parameter are “Religious”, “Community”, “Business”, and “Commercial” etc.



Customer Type Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Customer Type/Description

These fields allow a Code and description to be entered to describe a type of Customer, e.g. Commercial, Religious etc. The Code field allows 10 characters and the Description field allows 50 characters. Both fields are mandatory.

Active Indicator

This flag is an On/Off indicator which determines whether the Customer Type is available for use.

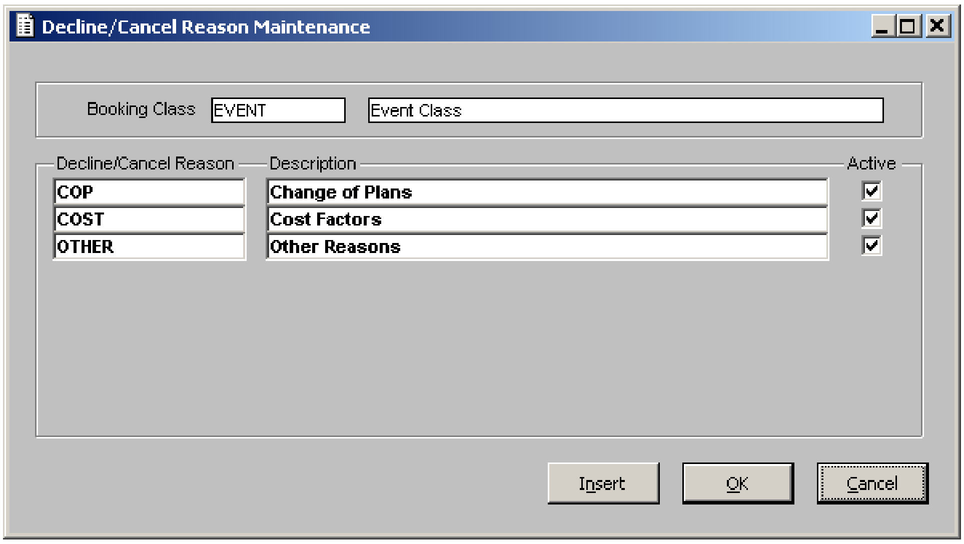
Decline/Cancel Reason

Decline/Cancel reasons may be set up per Class in the Bookings Management Module.

When a Request is set to a Status that has the System Status of “Available for Booking” (during Request Maintenance, or when updated by a Workflow Action) the user will be prompted to select a Decline/Cancel Reason. The selection of a Decline/Cancel Reason is mandatory and is recorded against the Booking Request. When a Booking Line is Cancelled or Declined then the user will be required to select a Decline/Cancel Reason.

Decline/Cancel Reason Maintenance Form

The Decline/Cancel Reason Maintenance form allows the user to establish Reasons which can be recorded for the Cancellation of a Booking Request.



Decline/Cancel Reason Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Decline/Cancel Reason / Description

These fields allow a Code and Description to be entered to describe a Decline/Cancel Reason. The Code field is a 10 character mandatory field, and the description field allows 50 characters. They are mandatory fields.

Active Indicator

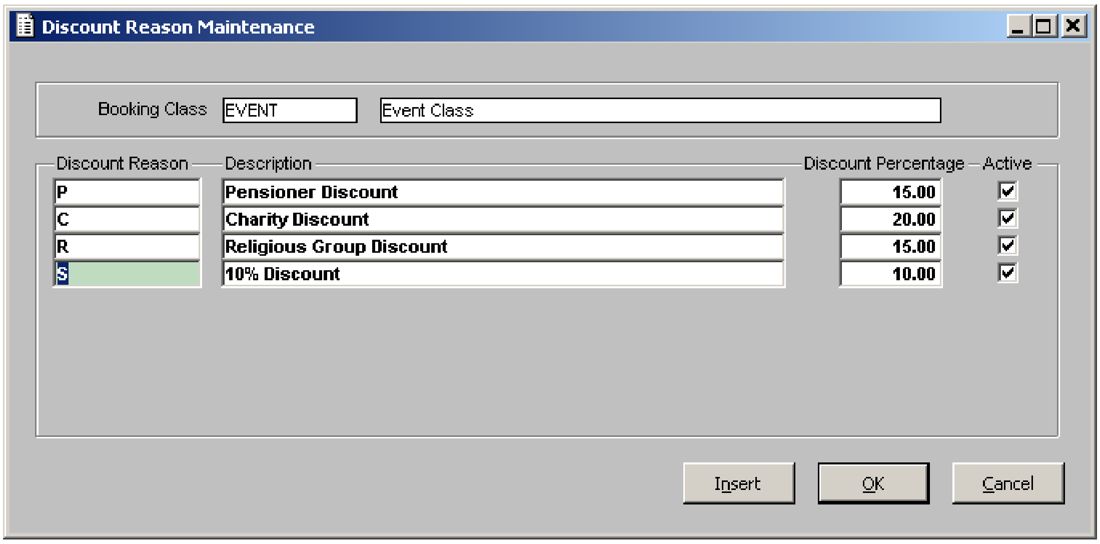
This flag is an ON/Off indicator and will determine whether the Decline/Cancel Reason is available for selection.

Discount Reason

This parameter allows the user to define a list of Discount Reasons that can be applied to a Booking when discounts are applied to charges.

Discount Reason Maintenance Form

The Discount Reason Maintenance form allows the user to establish a list of Reasons that can be applied to a Booking Request when discounts are applied to charges.



Discount Reason Maintenance Form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Discount Reason/Description

These fields allow a Discount Reason Code and Description to be defined to enable discount to be applied to a Booking. The Code field allows a maximum of 10 characters and is a mandatory field. The Description field allows a maximum of 100 characters and is also mandatory.

Discount Percentage

This field is the discount percentage that will be applied to a Booking Line (for Facility Charging) or a Booking Request (for Activity Type charges) when the Discount Reason is selected. This is a percentage field. When a Discount Reason is selected, then where a Discount Percentage has been defined, the discount will be calculated and applied to all fees recorded against the Booking Line.

Note: This field will not accept values greater than 100.

Active Indicator

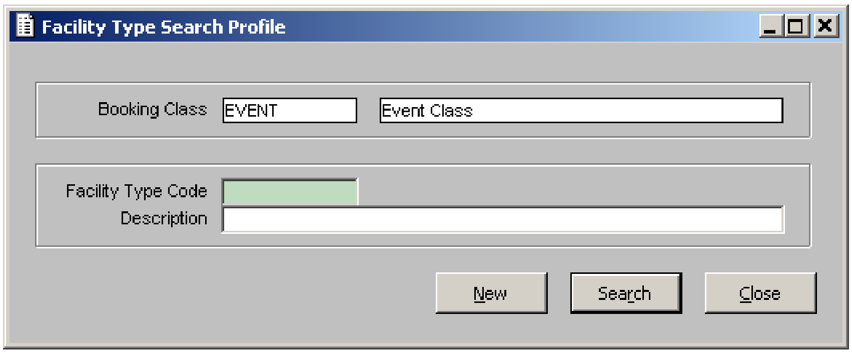
This flag is an On/Off indicator which is set ON by default. It determines whether the Discount Reason is available for selection. If a Discount Reason is Inactive it will not be able to be selected. If the Inactive Discount Reason had been used on any previous transactions, then the Discount Reason will still be displayed against those transactions. The Active Indicator is standard Pathway functionality and allows the user to “retire” a parameter setting that has been superseded by a new parameter, but still allow previous records to refer to the “retired” value. If a Discount Reason has been used on any transactions, then it will not be able to be deleted.

Facility Types

Facility Types are able to be defined and may be used to group Facilities, e.g. A Facility Type may be created called “Halls” and all Facilities that are Halls (Community Halls, Church Hall etc) can be linked to this Facility Type.

Facility Type Search Profile Form

This form allows the user to create a new Facility Type or search for an existing one.



Facility Type Search Profile form

Booking Class

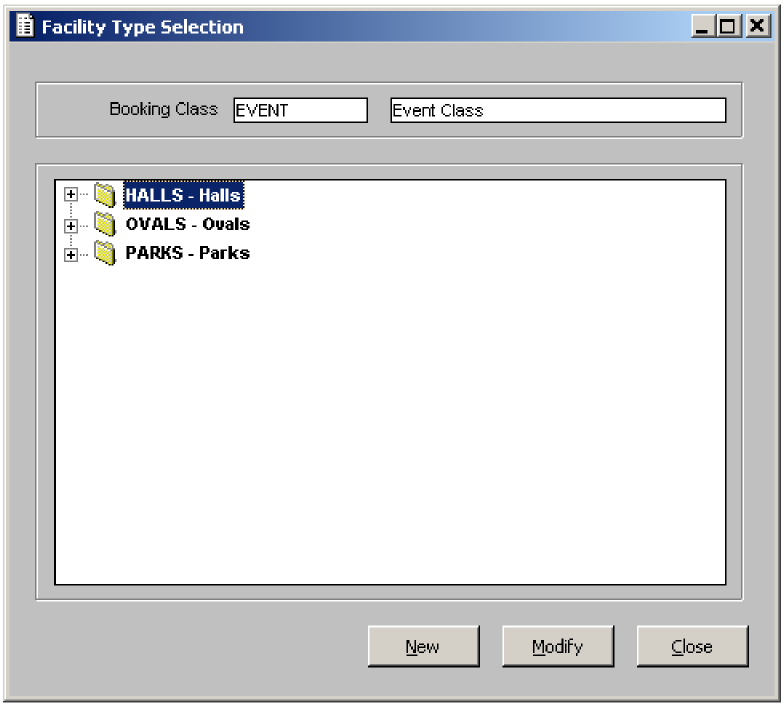
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility Type Code/Description

Enter a Facility Type Code and/or Description on which to base your search and then select the Search button.

Facility Type Selection Form

The Facility Type Selection form displays when the Search button is selected on the Facility Type Search Profile form if more than one Facility Type exists. It allows the user to select from a hierarchical tree-type list. Clicking on the + or – boxes will expand and collapse the branches of the tree.



Facility Type Selection Form

Booking Class

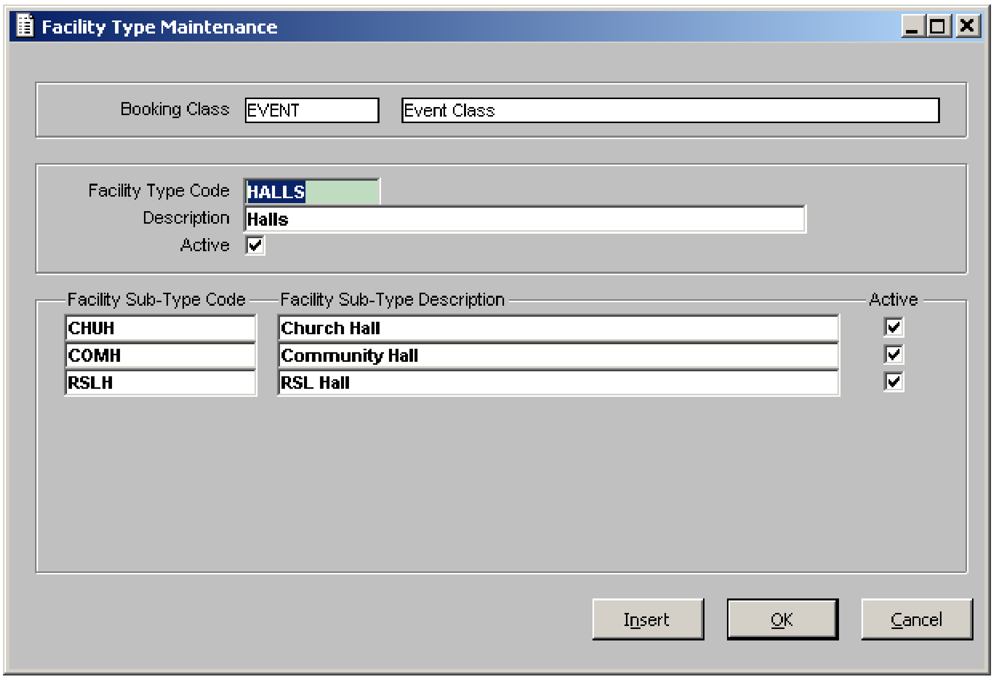
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility Type

This field displays the Facility Types which are available for selection. The tree structure allows the expansion of parent Types to display child Types.

Facility Type Maintenance Form

Facility Types (e.g. Halls, Parks, Ovals etc) may be defined on this form. A Facility Type may be further broken down into Facility Sub-Types and linked to the Facility Type.



Facility Type Maintenance Form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility Type Code/Description

These fields allow a 10 character Facility Type Code and a 50 character Description to be defined. Both fields are mandatory.

Active Indicator

This flag is an On/Off indicator which determines whether the Facility Type is active and available for use.

Facility Sub-Type Code/Description

Once a Facility Type has been defined the user is able to define a number of Sub-Types to the Facility Type. This provides an additional breakdown of the types of Facilities for council. One or many Sub-types are able to be defined for each Facility Type. A Sub-type has the same attributes as a Facility Type, i.e. Code, Description and Active indicator.

Active Indicator

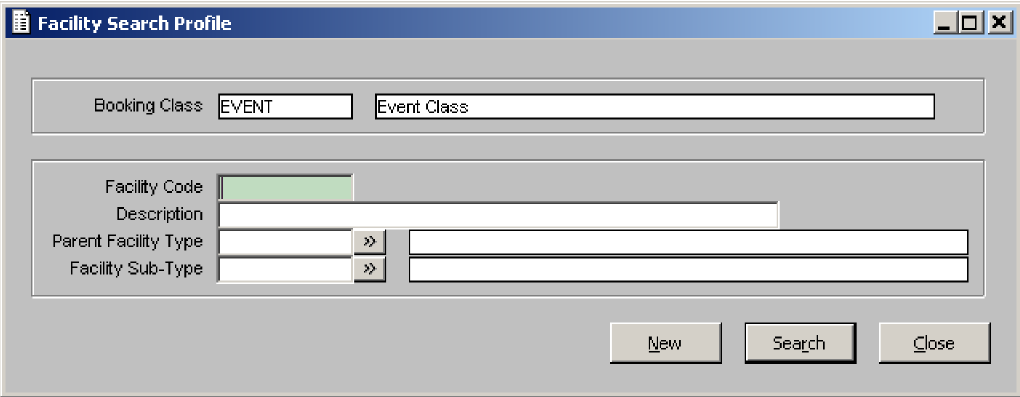
This flag is an On/Off indicator which determines whether the Facility Sub-Type is active and available for use.

Facilities

Facilities are the items (Halls, Notice Boards etc) that are able to be selected to be booked against a Booking. For Facility Bookings this will be halls and notice boards etc, for Event and Film Facilitation this will be Locations of streets, parks etc.

Facility Search Profile Form

The Facility Search Profile form allows the user to create new Facilities or, alternatively, to search for existing ones.



Facility Search Profile Form

Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

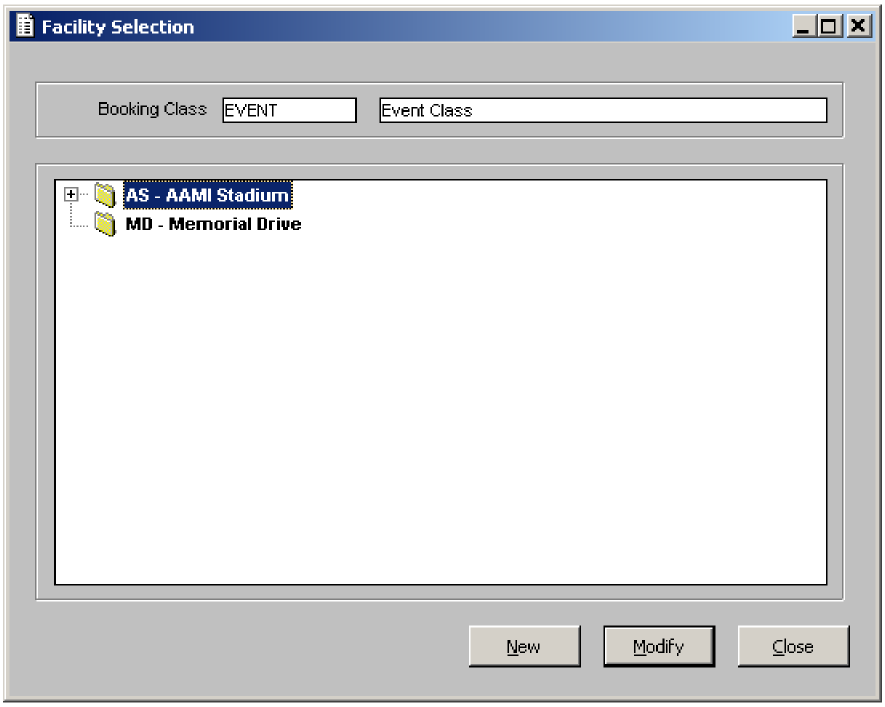
Facility Code/Description
Enter a Facility Code and/or Description on which to base your search.

Parent Facility Type
Enter, or select from the Pop Up, a Parent Type Facility on which to base your search.

Facility Sub-Type
Enter, or select from the Pop Up, a Facility Sub-Type on which to base your search.

Facility Selection Form

The Facility Selection form displays when the Search button is selected on the Facility Search Profile form if more than one Facility exists. It allows the user to select from a hierarchical tree-type list. Clicking on the + or – boxes will expand and collapse the branches of the tree.



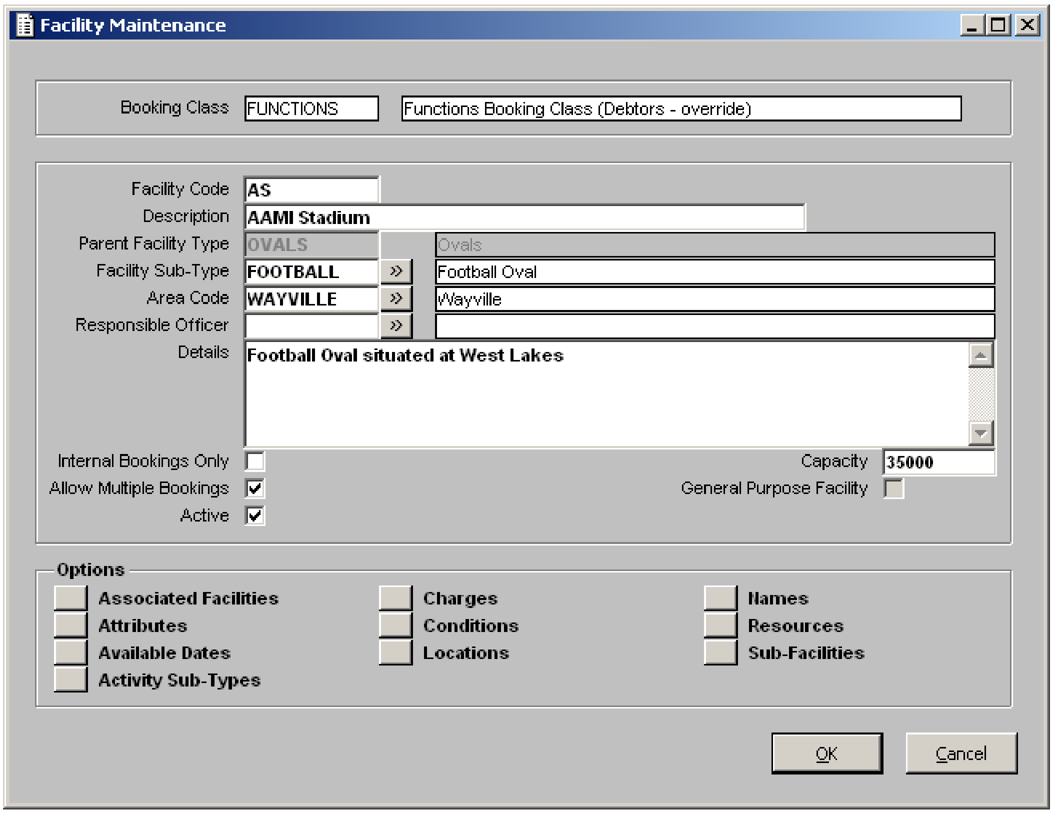
Facility Selection Form

Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility
This field displays the Facilities which are available for selection. The tree structure allows the expansion of parent Types to display child Types.

Facility Maintenance Form

Facilities are the actual items (Halls, Notice Boards etc) that are able to be selected to be booked against a Booking. For Facility Bookings this will be actual halls and notice boards etc, for Event and Film Facilitation this will be Locations of streets, parks etc. This form allows parameters to be set for Facilities. If a Facility is flagged as a General Purpose Facility, e.g. Street, then the Associated Facilities Button becomes dimmed and unavailable.



Facility Maintenance form

Link Maintenance in Sub-Facilities

When performing maintenance on Names, Locations or Conditions from Facility Maintenance, the process will keep track of which links have been added or deleted. Then , when the “OK” button is pressed to accept the changes to the Facility, a new form will be displayed indicating which link types have been changed, and offering the user the ability to ‘Merge’ or ‘Copy’ those changes with some or all of the associated Sub-Facilities.

The Sub-Facility Links Maintenance form gives the user the option of applying changes to Names, Locations and Conditions to associated Sub-Facilities.

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility Code/Description

This is the code for the Facility. This is a 10 character field which is mandatory. E.g. OCR. The Description further describes the Facility and allows a 50 character description. These fields are mandatory.

Parent Facility Type

The Parent Facility Type can be keyed in or selected from the list of available Facility Types. Only “Active” Facility Types will be presented for selection. The selection of a Facility Type is mandatory against a Facility.

Facility Sub-Type

The Sub Facility-Type may be keyed in or selected from the list of available Facility Sub-Types sourced from the Facility Type selected. This field is not maintainable until the user has selected a Facility Type. The selection of a Facility Sub-Type is optional.

Area Code

The user may key in a valid Area Code or, alternatively, select one from the Booking Area Pop Up. If the user enters an Area Code into this field, then the General Purpose Facility flag becomes dimmed and cannot be selected for this Facility (as a General Purpose Facility cannot have an Area Code defined). Conversely, if the General Purpose Facility flag is checked ON then the Area Code field does not display.

Responsible Officer

The Responsible Officer field allows Council to allocate a Responsible Officer who is to be nominated for a Booking. This is used for Bookings made via ePathway where a specific person within Council needs to be allocated responsibility. If a Responsible Officer is set up at the Activity Sub-Type level, then it will override a Responsible Officer which has been set up at the Activity Type level. If a Facility nominated for the 'first' Booking Line has a default Responsible Officer, then this Officer will override any that already exist on a Booking. Additionally, the Responsible Officer set up at the Sub-Facility level will override one set up at the Facility level. If no Responsible Officer has been set up as a default at any of these levels then the Responsible Officer for the Booking will be set to the currently logged on user.

Note: The above functionality only applies to Booking Requests lodged via ePathway. In Pathway, the Responsible Officer is always the Receiving Officer (i.e. the Officer taking the Booking) unless manually changed. When changes are made on a Booking Line or to the Activity Type by a different officer from the one who originally took the booking, the Responsible Officer does not get automatically changed. The original Officer remains with the booking unless manually overridden in the case where reassignment of the booking becomes necessary.

Details

This field is an unlimited text field that allows the user to enter a description of the Facility.

Internal Bookings Only

This flag is an On/Off indicator and will be set Off by default. If this is set On the Facility is available for booking on Internal Booking Requests only. This is used where Facilities can be booked for council use, but not by external customers. If this flag is checked ON, then the Charges button becomes dimmed and Charges will not apply.

See further details: For Internal Bookings

Allow Multiple Bookings

If the Facility has "Allow Multiple Bookings" checked ON, then at the Booking Line level in Booking Entry/Maintenance, a check is made on the Facility's 'Allow Multiple Bookings' setting. The following rules will be implemented when determining if a Facility is free for booking:

- Clashes with Resource Bookings are not allowed regardless of the setting of the *Allow Multiple Bookings* flag against the relevant Facility, since Resources are not the sorts of things two groups can share at once.
- In Booking Line Street/Suburb Maintenance, adding a Street/Suburb Location for which a conflicting Booking exists is only allowed if both the current Line's Facility and the conflicting Line's Facility are "multi-book".
- In Booking Maintenance, when maintaining a Line where the relevant Facility is "multi-book":
    - If the Line has Locations, a clashing Street/Suburb Booking is not allowed unless the relevant Facility is also "multi-book".
    - If the Facility is an "Autobook" Sub-Facility, the Line is only allowed to clash with a Booking at the parent level if the parent Facility is also "multi-book".
    - If the Facility is a parent Facility:

        - The Line is only allowed to clash with another Booking for the parent if all of the "Autobook" Sub-Facilities are also "multi-book".
        - The Line is only allowed to clash with a Booking for an "Autobook" Sub-Facility if the Sub-Facility is also "multi-book".

    - Otherwise, if the Facility is neither a parent nor an "Autobook" Sub-Facility, the Line is allowed regardless of clashes

A message will display to inform the user of the clash and whether or not the booking can proceed. The following messages may be displayed:

> There is a conflicting Booking for the selected Facility or an 'Autobooked' Sub-Facility.
> Another Booking exists from 20:00:00 to 23:00:00 on Booking Number 8.
> The requested Booking cannot be accepted.

> There is a conflicting Booking for the selected Facility or an 'Autobooked' Sub-Facility.
> Another Booking exists from 20:00:00 to 23:00:00 on Booking Number 8.
> However the Facility allows 'Multiple Bookings' and therefore this Booking can be accepted.

Active
This flag is an On/Off indicator which determines whether the Facility is active and available for use.

Capacity
This field is an optional numeric field which allows the user to enter the maximum number of persons that the Facility can accommodate. This is an information only field and is not used to drive any processing. This will assist Bookings to be made where a Customer wants to find a hall that can accommodate more than 50 people.

General Purpose Facility Flag
The General Purpose Facility flag determines whether a Facility is treated as a 'generic' Facility. This type of Facility enables the user to specify a Street/Suburb Location **at the time of entering** the Booking Request.

If this indicator is checked ON on this form then the Location and Sub-Facilities Option buttons will not be available on this form, nor will the Area Code field (as a location cannot be specified here).

Conversely, if the Area Code field has data in it, the General Purpose Facility flag becomes unavailable.

Options – Associated Facilities
Selection of this button displays the Associated Facilities Selection form which allows the selection of Facilities to be associated with the Facility being entered.

Options – Available Dates
Selection of this button displays the Facility Available Date Maintenance form which allows a council to set up booking availability dates and date ranges for particular Facilities.

Options – Activity Sub-Types
Selection of this button displays the Facility Activity Sub-Type Maintenance form which allows a council to select Activity Sub-Types to associate with the selected Facility. Parent Activities are not able to be selected. The Select button will only become available when an Activity Sub-Type is selected.

Options – Charges
Selection of this button displays the Facility Charge Search Profile form where the user is able to set up various charges associated with the hiring of a Facility. If the 'Internal Bookings Only' flag has been checked ON, then the Charges button is dimmed and unavailable.

Options – Conditions

Selection of this button displays the Facilities Conditions Maintenance form where the user may set up Conditions pertaining to a Facility.

Options – Attributes
Selection of this button displays the Facility Attribute Selection form which allows the user to assign available Attributes (e.g. Power, Hot Water etc) to a Facility, an Activity Type or a Sub-Facility.

Options – Locations
Selection of this button displays the Location Link Maintenance form. This option is mandatory, i.e. once a Facility is set up, a location is required to be nominated before exiting the form. The location of the Facility links directly to the Property module within Pathway. This allows selection of the location of the Facility.

Options – Names
Selection of this button displays the Facility Name Role Maintenance form. The Name Role function uses the standard Name and Address interface to link names to Activity Types and Facilities.

Options – Resources
Selection of this button displays the Resource Search Profile form which allows the user to add a new Resource or search for an existing one.

Options – Sub-Facilities
Selection of this button displays the Sub-Facility Selection form which allows the user to create a new Sub-Facility or maintain an existing one.

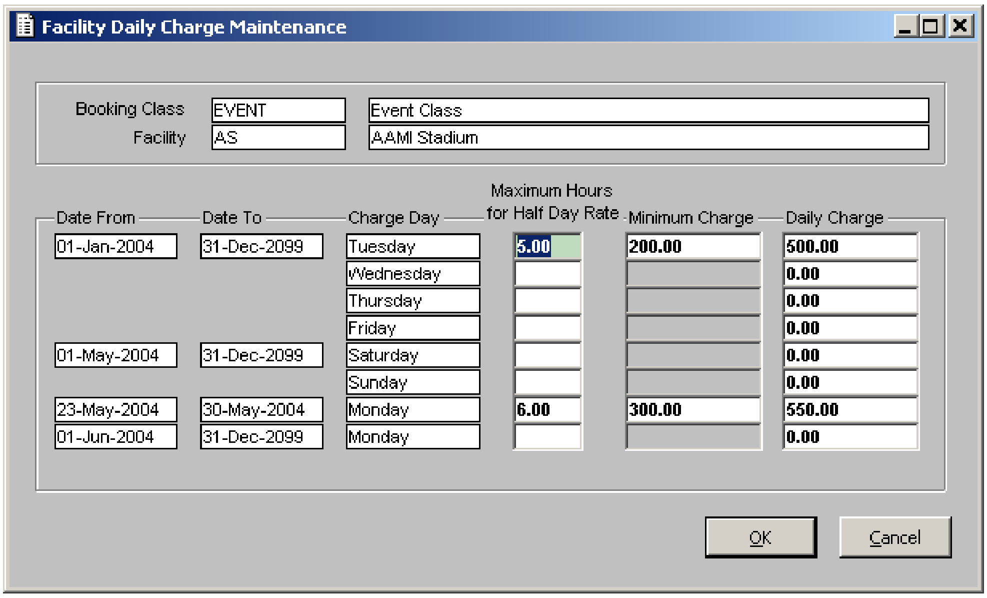
Facility Daily Charge Maintenance Form

This form displays if Daily Fee Type is selected in the Facility charge Maintenance form. This will allow the user to define charges based on From and To dates, different charges for different days of the week, the maximum number of hours that can elapse to receive the half day rate charge, as well as minimum charges and the standard daily charge. Once the Maximum Hours for Half Day Rate have been exceeded then a full day rate will be applied. This field is optional, and will only be used in processing if the user has entered a value. If "Maximum Hours for Half Day Rate" is entered then the user must enter a value in the "Minimum Charge" field. This will be used when the number of hours on the booking is less than the Maximum Hours for half Day Rate.

The calculation of the number of days is based on a 24 hour clock. The user can nominate a different daily rate for each day in the week. This allows a different fee to be charged Monday-Friday as opposed to Saturday and Sunday, e.g. if a Customer has booked a Hall from Monday 9 am till Tuesday 4 pm, then the number of days will be calculated as 1 day and 7 hours (Monday 9 am till Tuesday 9 am and then the remaining hours). If the maximum number of hours per half day was set at 4 hours then the Customer would be charged for 2 days.

If a Customer has booked a Hall from Monday 9 am till Monday 12 pm, then they will be charged the minimum rate as the number of hours is less than the half day rate. If a Customer has booked a Hall from Monday 9 am till Monday 8 pm then they will be charged the full daily rate.

Warning: Any changes to Available Days or Available Times must be followed by a review of the Charges related to these Days/Times. These will not be updated automatically.



Facility Daily Charge Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the selected Facility, e.g. AS, AAMI Stadium.

Date From/Date To

These fields display a date range during which time the appropriate Fee Charges will apply, e.g. 15-Jun-2004 to 11-Jul-2004.

Charge Day

These fields display the Charge Day during which the appropriate Fee Charges will apply. The options are:

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Maximum Hours for Half Day Rate

If “Maximum Hours for Half Day Rate” is entered then the user must enter a value in the “Minimum Charge” field. This will be used when the number of hours on the booking is less then the Maximum Hours for half Day Rate. Once the Maximum Hours for Half Day Rate have been exceeded then a full day rate will be applied. This field is an optional numeric field, and will only be used in processing if the user has entered a value.

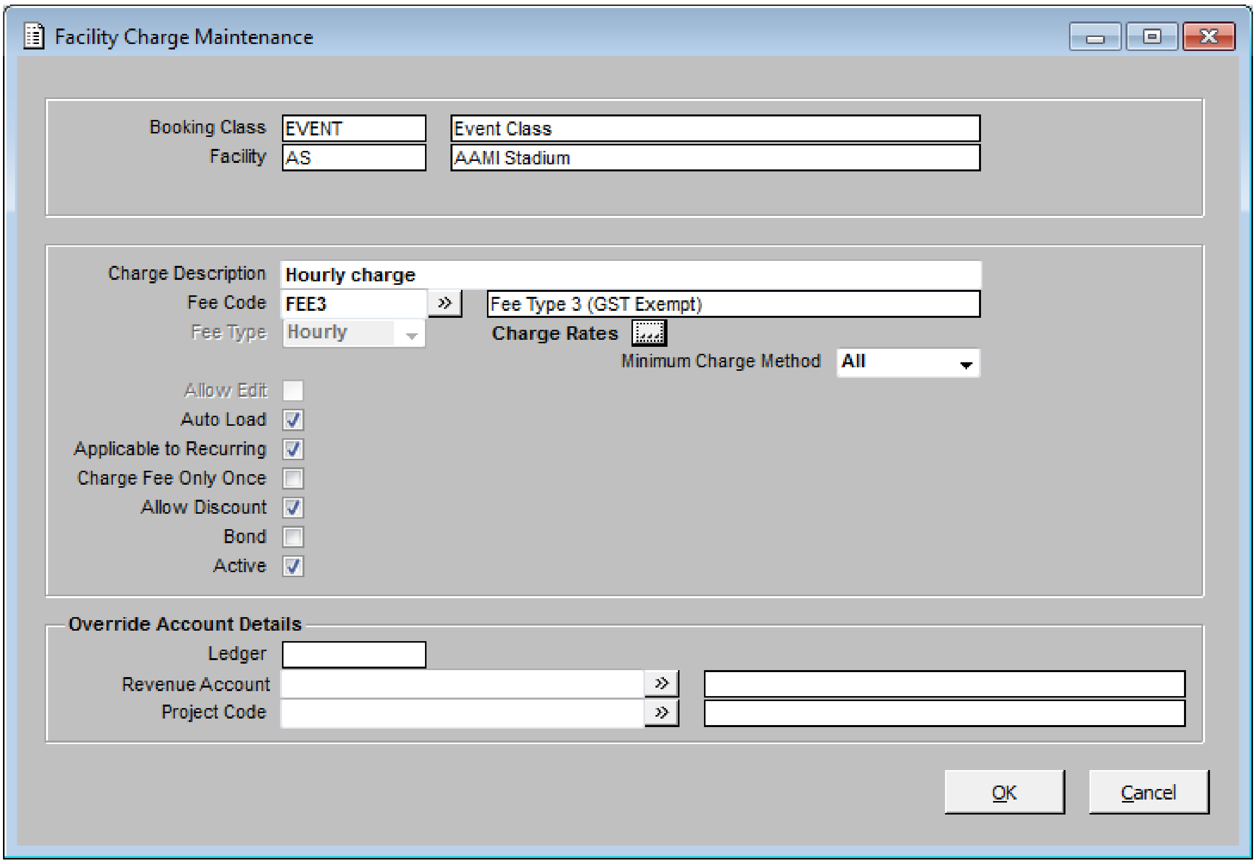
Minimum Charge

If “Maximum Hours for Half Day Rate” is entered then the user must enter a value in the “Minimum Charge” field. This will be used when the number of hours on the booking is less then the Maximum Hours for half Day Rate.

Daily Charge

If a customer has booked a Facility for a day then the daily rate will apply. If there is an entry in the Minimum Charge field then the daily rate will only be charged if the Maximum Hours for Half Day Rate is exceeded.

Facility Hourly Charge Maintenance Form



Facility Charge Maintenance form

The Bookings Module has been enhanced to provide the ability to apply only one Minimum Charge for an Hourly Fee where the Booking Line spans multiple Hourly Charge periods. This has been achieved by the introduction of a Minimum Charge Method parameter for Facility and Resource based Hourly charges on the Facility (or Sub-Facility) Charge Maintenance form.

When the Minimum Charge Method has a value of:

- **All** – The Minimum Charge for each period will be applied separately in exactly the same way that it was before the Minimum Charge Method was introduced.
- **Lowest** – Only the lowest Minimum Charge will be applied where a Booking Line spans multiple Hourly Charge periods.

Example

Time Period	Minimum Charge	Hourly Charge
00:00 – 10:00	400	100
10:00 – 23:99	480	120

If Booking Line is entered for 8:00 to 11:00 and if the Minimum Charge Method is set to “All”:

Time Period	Calculation	Calculated Fee
00:00 – 10:00	100 x 2hrs = 200	400

	(less than min. so Minimum Charge is applied)	
10:00 – 23:99	120 x 1hr = 120 *(less than min. so Minimum Charge is applied)*	480
Total		**880**

If Booking Line is entered for 8:00 to 11:00 and if the Minimum Charge Method is set to “Lowest”:

Time Period	Calculation	Calculated Fee
00:00 – 10:00	100 x 2hrs = 200	280 *(included by 80 so that combined total equal the lowest Minimum Charge)*
10:00 – 23:99	120 x 1hr = 120	120
Total	320 *(less than the lowest Minimum Charge so lowest Minimum Charge is applied i.e. 400. The calculated fees have to be increased by the difference)*	**400**

If Booking Line is entered for 9:00 to 13:00 and if the Minimum Charge Method is set to “Lowest”:

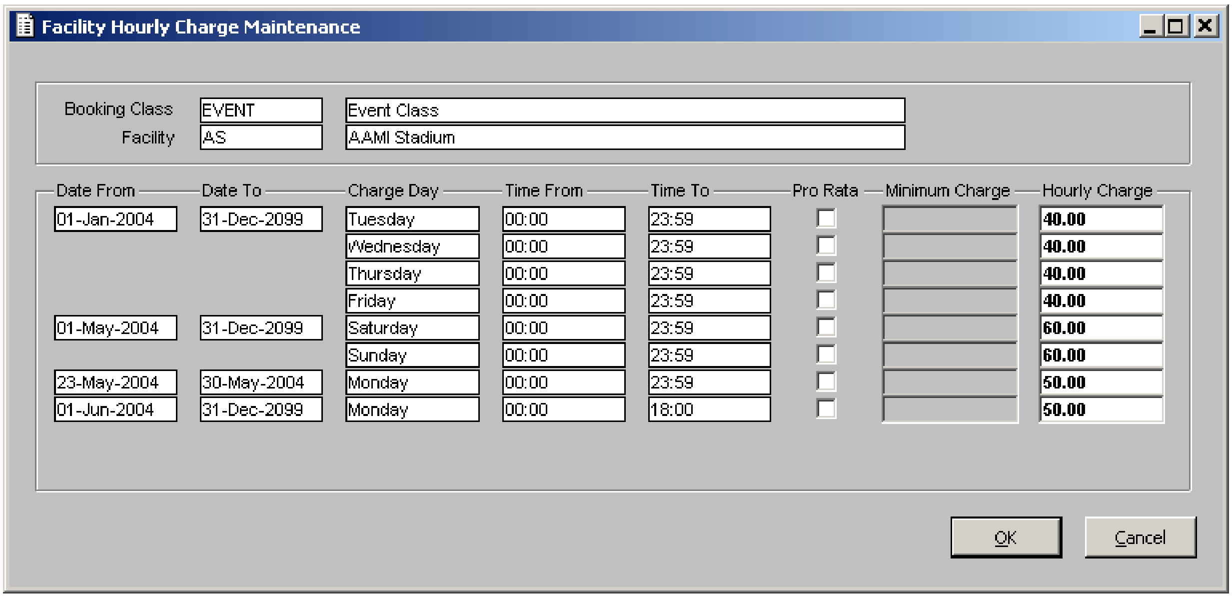
Time Period	Calculation	Calculated Fee
00:00 – 10:00	100 x 1hr = 100	100
10:00 – 23:99	120 x 3hrs = 360	360
Total	460 *(greater than lowest Minimum Charge i.e. 400)*	**460**

This form displays if Hourly Fee Type is selected in the Facility Charge Maintenance form. This will allow the user to define charges based on From and To dates, different charges for different days of the week, Start and End Times, Pro Rata eligibility as well as minimum charges and the standard hourly charge. Each day and time range that has been entered in “Facility Available Date/Time Maintenance” will be defaulted as the dates and times that Hourly charges apply.

Any new Hourly rates entered by the user will assume that the rate is for 24 hours per day. Users will be required to amend the rates as required, e.g. the user may set an Hourly Fee Code for hall usage between Monday to Friday 9am and 5pm and then assign a different rate for Monday to Friday 5.01pm till 11:59pm, and a different rate from Saturday 12:00am till 9am. In this way the user will be able to charge at different rates on the booking based on the time that the Facility is being used.

If there is no cost to use the Facility at certain times then the rate entered will be zero dollars. The rate entered will be a monetary field. Note that no overlap of hours is allowed when setting these details, i.e. costs will not be able to be defined for 9:00 to 17:00 and then 16:00 to 19:00.

Warning: Any changes to Available Days or Available Times must be followed by a review of the Charges related to these Days/Times. These will not be updated automatically.



Facility Hourly Charge Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the selected Facility, e.g. AS, AAMI Stadium. They are display only and cannot be maintained.

Charge Details –Date From/Date To

These fields display a date range during which time the appropriate Fee Charges will apply, e.g. 15-Jun-2004 to 11-Jul-2004.

Charge Day

These fields display the Charge Day during which the appropriate Fee Charges will apply. The options are:

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Time From/Time To

These fields display the range of hours that a Facility is available, by day, in 24 hour format e.g. 00:00 – 23:59.

Pro-Rata

A “Pro-Rata” option is available for each Hourly rate entered. This will determine whether the Hourly cost can be Pro-Rated. If this option is set on, then the user can optionally enter a value in the “Minimum Charge” field.

When the cost is calculated, if Pro-Rata is in effect, then if the calculated amount is less than the minimum charge, then the minimum charge will be applied.

Minimum Charge

This field allows the user to enter a Minimum Charge amount. This field becomes available when the Pro Rata flag is checked ON.

When the cost is calculated, if Pro-Rata is in effect, and if the calculated amount is less than the minimum charge, then the minimum charge will be applied.

Note: The amount entered in this field may be any amount, and is not restricted to an amount which is less than the hourly rate.

Hourly Charge
This field allows an amount to be entered as the hourly charge to apply within the Date/Time range specified. When a Charge is defined as Hourly then a check will be made against the "Facility Available Date/Time" settings to ensure that there are charges recorded for all hours. If there are hours that have not been defined with charges then the user will be required to enter the information before being able to accept the Charges and the Facility details.

An example to describe how Hourly charges will be applied is provided below.

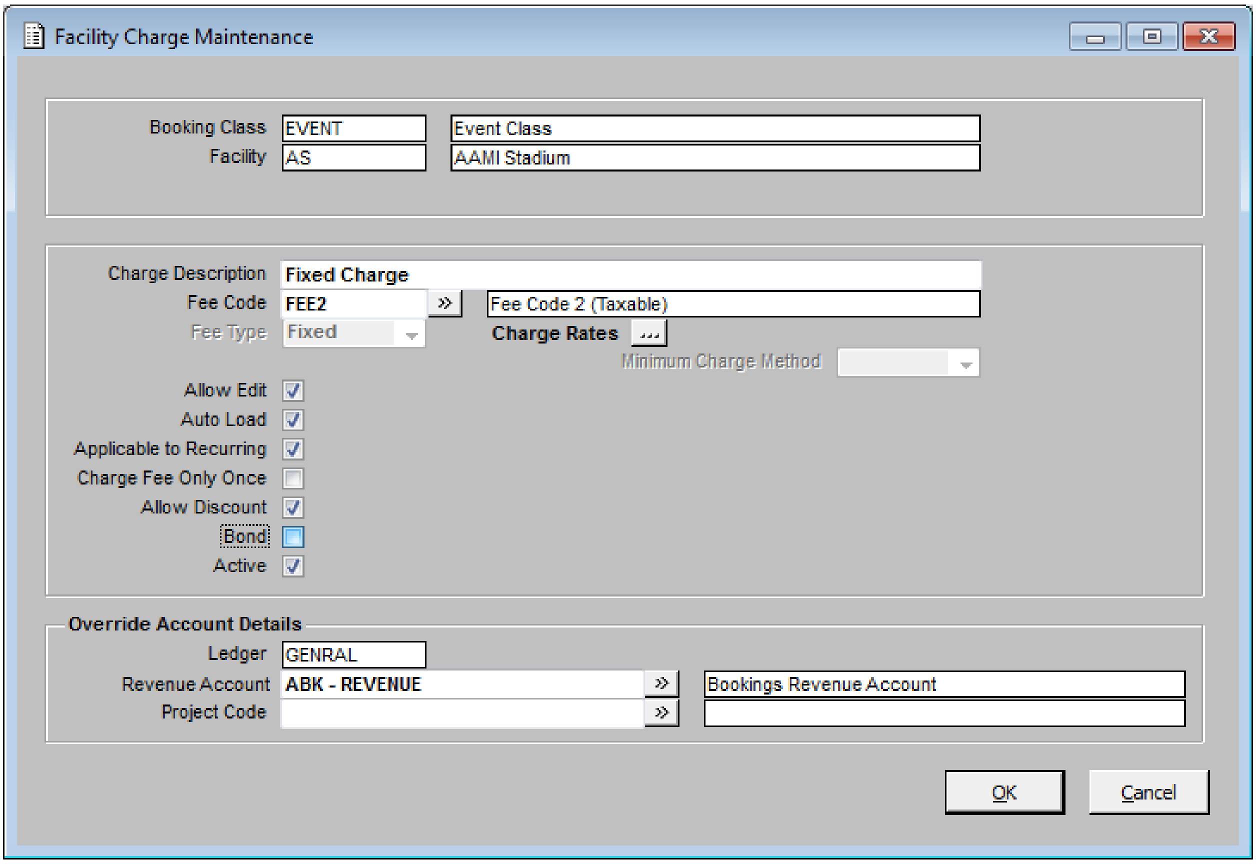
<u>Example</u>
A booking is made for a hall from Friday 3pm till Sunday 5pm.

The rates are set up as follows:
Friday 9.00 – 17:00 $10
Friday 17:00 – 23:59 $15
Saturday 00:00 – 23:59 $20
Sunday 00:00 – 23:59 $20

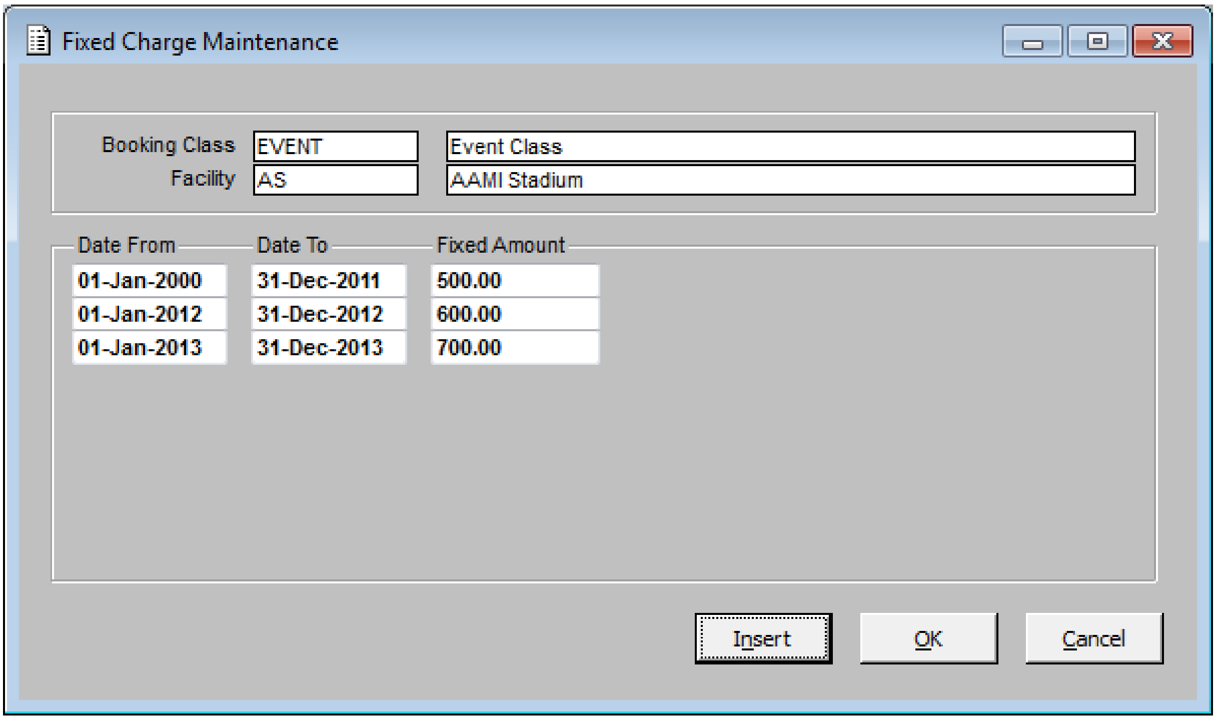
The number of hours will be calculated and charged as follows.
Friday 15:00 – 17:00 = 2 hours @ $10 per hour = **$20**
Friday 17:00 – Friday midnight = 7 hours @ $15 per hour = **$105**
Saturday 00:00 – Saturday midnight = 24 hours @ $20 per hour = **$480**
Sunday 00:00 – Sunday 17:00 = 17 hours @ $20 per hour = **$340**

This provides the total cost for the booking at **$945**.

Facility Fixed Charge Maintenance Form



The Bookings Module has been enhanced to allow time periods to be nominated for Facility based Fixed Charges. This has been achieved by the introduction of a Fixed Charge Maintenance form accessible from the Facility (or Sub-Facility) Charge Maintenance form. Activity Type or Resource based Fixed Charges are not affected by this enhancement and work as they always have (i.e. one Fixed Charge).



Note: the Date From and Date To field are NOT linked to the Facility's Available Dates and Times. As such, the "Copy" available days, times and fees function (if authorised to it) will not affect the new Facility based Fixed Charges.

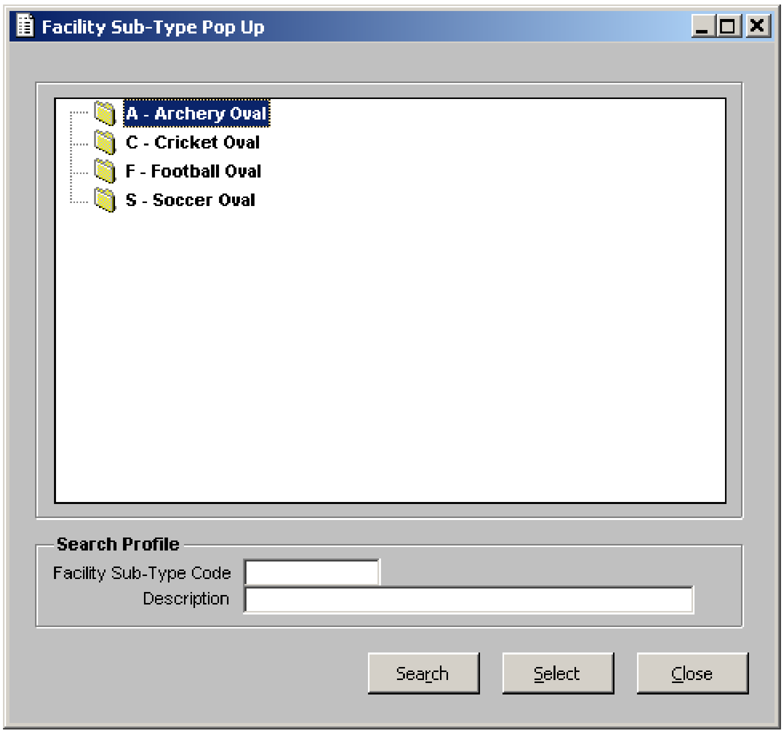
Example

Based on the above screen shot:

- A Facility Charge for a Booking Line with a date of 28/12/2012 will be $600
- A Facility Charge for a Booking Line with a date of 2/1/2013 will be $700

Facility Sub-Type Pop Up Form

The Facility Sub-Type Pop Up form displays when the Pop Up button is selected on the Facility Maintenance form on the Facility Sub-Type field. It allows the user to select from a hierarchical tree-type list. Clicking on the + or – boxes will expand and collapse the branches of the tree.



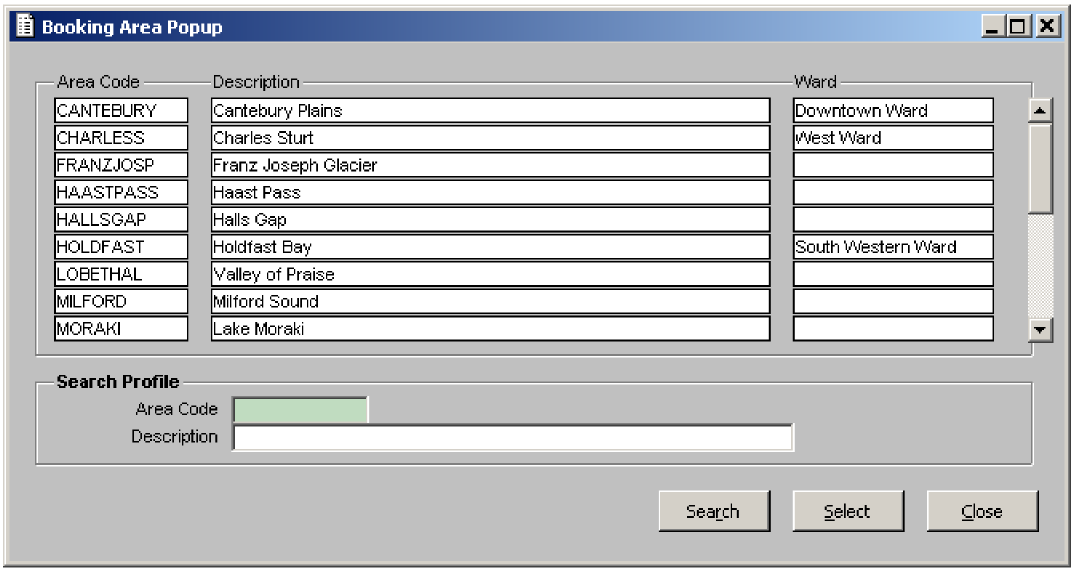
Facility Sub-Type Pop Up Form

Facility Sub-Type
This field displays the Facility Sub-Types which are available for selection. The Sub-Types will display in a tree structure at one level.

Search Profile – Facility Sub-Type Code/Description
Enter a Facility Sub-Type Code and/or Description on which to base your search and then select the Search button.

Booking Area Pop Up Form

The Booking Area Pop Up displays when the Area Code Pop Up button is selected on the Facility Maintenance form. It allows the user to select an existing Booking Area to a Facility.



Booking Area Pop Up form

Area Code/Description
These fields display details of Booking Areas which have been set up in Parameters. These fields are display only.

Ward
This field displays the Ward defined for the Booking Area. This field is display only.

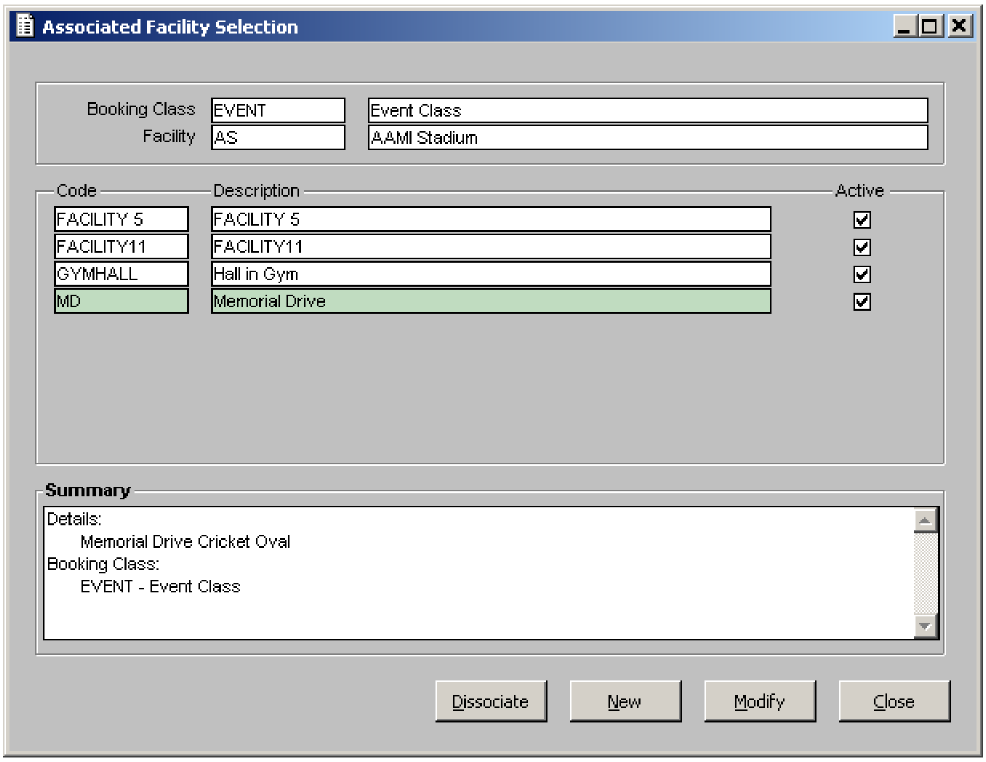
Search Profile – Area Code/Description
Enter an Area Code and/or Description on which to base your search and then select the Search button.

Associated Facility Selection Form

This option allows the selection of Facilities to be associated with the Facility being entered. Associated Facilities can be sourced from across classes. In this way, users will be notified of any bookings in Parks that may affect any bookings within a hall. Associated Facilities are displayed under their appropriate Class Identifier so that users can determine the source of the Facility.

When entering a new Booking Request and the Facility is selected, a search will be performed on Associated Facilities to determine whether there are any Bookings for the Associated Facilities. The user will be warned of these bookings so that they can determine whether the booking being entered should continue.

Note: An Associated Facility must be a Parent Facility. Sub-Facilities cannot be associated in this way.



Associated Facility Selection form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the Facility, e.g. AS, AAMI Stadium.

Associated Facility Code/Description

These fields list the Facility Code and Description of the Facilities which have been associated with the selected Facility. There is a Dissociate button which will allow the user to dissociate a Facility. If a user does not have access to a Facility, then the Modify and Dissociate buttons will not be available when focus is on these Facilities.

Booking Class

This field displays the Booking Class Code of the Associated Facility. Associated Facilities can be sourced from across classes. In this way, users will be notified of any bookings in Parks that may affect any bookings within a hall.

Summary

The Summary field displays summary details of the Associated Facility, e.g.

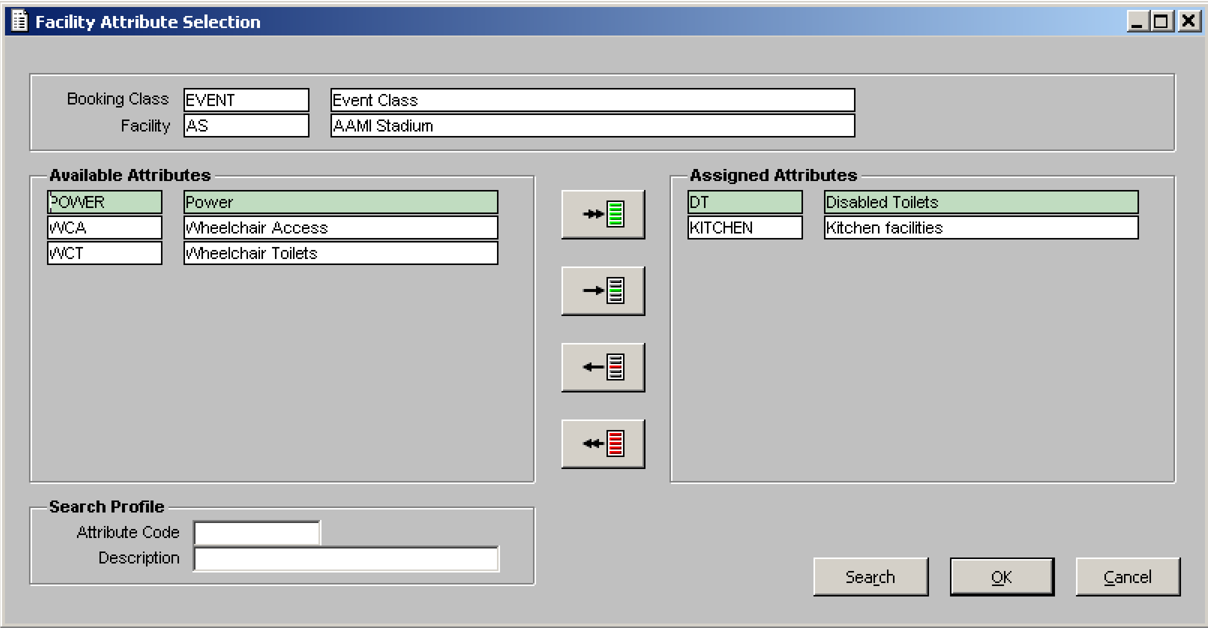
> Details:
>
> > Large Notice Board in main street
>
> Booking Class:
>
> > FB - Facility Bookings

Dissociate Button

Select this button after focusing on an Associated Facility to dissociate the selected Facility.

Facility Attribute Selection form

The Attribute Selection form displays when the Attribute Option button is selected on the Maintenance form. It can be called from a number of places – Activity Types, Facilities, and Sub-Facilities. It allows the user to assign available Attributes (e.g. Power, Hot Water etc) to a Facility, an Activity Type or a Sub-Facility.



Facility Attribute Selection form

Booking Class
These fields display details of the Booking Class.

Facility
These fields display details of the selected Facility.

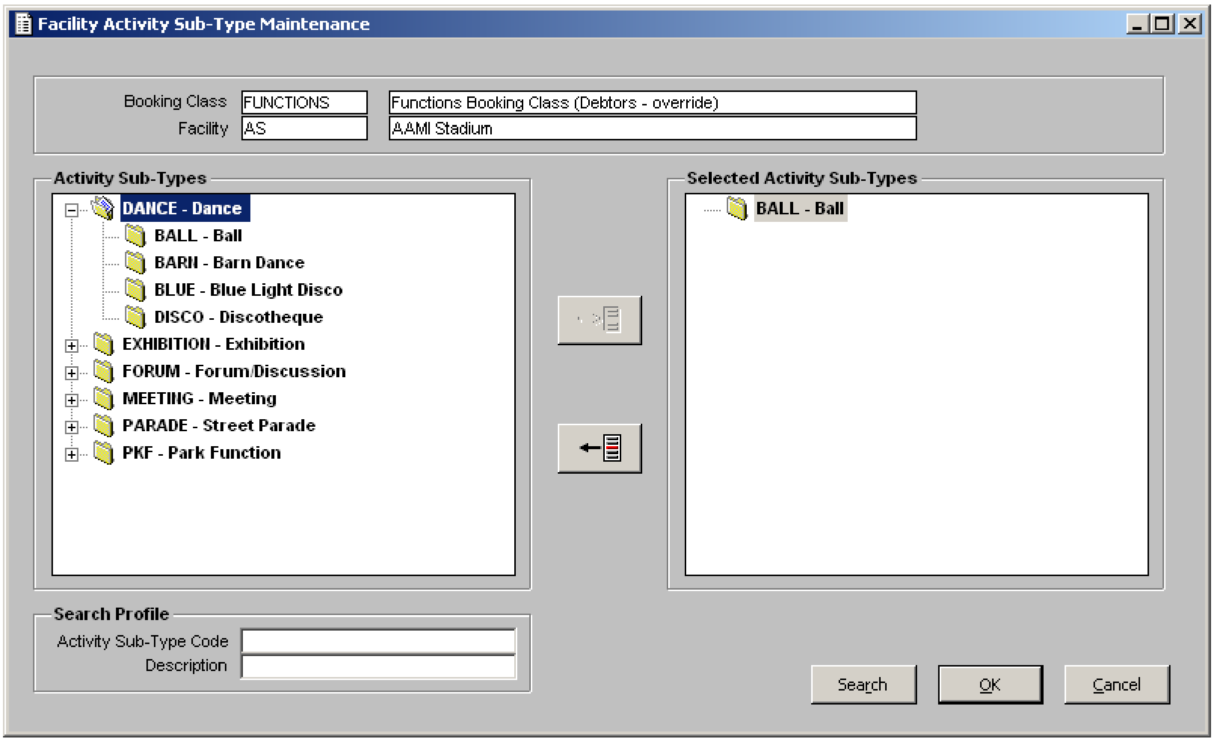
Available Attributes
These fields list the Attributes which are available with the Facility, e.g. Kitchen, Power.

Assigned Attributes
Available Attributes may be moved to the right hand side of the form to indicate they are available with the selected Facility.

Search Profile – Attribute Code/Description
Enter an Attribute Code and/or Description on which to base your search and then select the Search button. This function is useful when there are more than 9 Attributes to search through.

Facility Activity Sub-Type Maintenance form

The Facility Activity Sub-Type Maintenance Form is accessed by selecting the Activity Sub-Types option button on the Facility Maintenance form. It allows the user to select (or remove) Activity Sub-Types to associate with a Facility.



Facility Activity Sub-Type Maintenance

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the selected Facility to which the Activity Sub-Types are associated, e.g. AS, AAMI Stadium.

Activity Sub-Types

The Activity Sub-Types box lists the available Activities and Activity Sub-Types in a tree-like structure. Selection of a parent Activity is not allowed. However, selected of an Activity Sub-Type may be made by focusing on the required record and using the Select button to add an occurrence to the right hand side (Selected Activity Sub-Types). (Note: This action does not remove the occurrence from the LHS.)

Selected Activity Sub-Types

The Selected Activity Sub-Types box lists the Activity Sub-Types which have been selected from the Left Hand Side via the Select button. If an Activity Sub-Type is no longer required to be associated with a Facility then it may be removed to the Left Hand Side using the Remove button. (Note: This action removes it from the RHS of the form.)

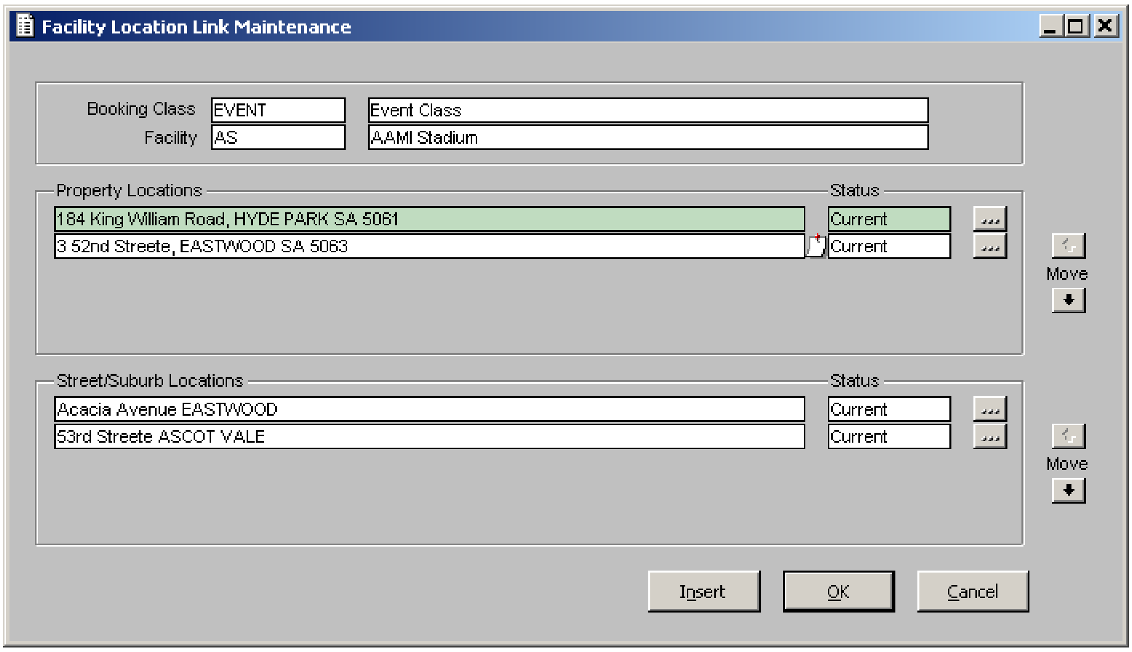
Search Profile

These fields allow a search profile to be entered to facilitate a search. This is useful when there are more than 9 Activity Sub-Types to search through.

Enter an Activity Sub-Type Code and/or Description on which to base your search and then select the Search button.

Location Link Maintenance Form

The location of the Facility links directly to the Property module within Pathway. This allows selection of the location of the Facility. This field is mandatory and the location of the Facility must be defined. The ability to link multiple Property Addresses is available. The ability to link to a Street\Suburb link as well as a Property is available.



Location Link Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the selected Facility, e.g. AS, AAMI Stadium.

Property Locations

The user is able to insert a Property via the Insert button. When the Insert button is selected the user is asked to select a Property or a Street/Suburb to add. Subsequently, the appropriate Search Profile is displayed. This is linked to the Property module. Once a Property has been inserted, the user is able to focus on an existing Property in the list and click the Insert button to insert a new one.

The Property Status (Current, Historic etc) also displays, as well as a detail button to allow the user to display the Property Summary form showing the Property details.

Street/Suburb Locations

The user is able to insert a Street/Suburb via the Insert button. When the Insert button is selected the user is asked to select a Property or a Street/Suburb to add. Subsequently, the appropriate Search Profile is displayed. This is linked to the Property module. Once a Street/Suburb has been inserted, the user is able to focus on an existing Street/Suburb in the list and click the Insert button to insert a new one.

The Street/Suburb Status (Current, Historic etc) also displays, as well as a detail button to allow the user to display the Street Maintenance form showing the Street/Suburb details.

Sub-Facility Links Maintenance Form

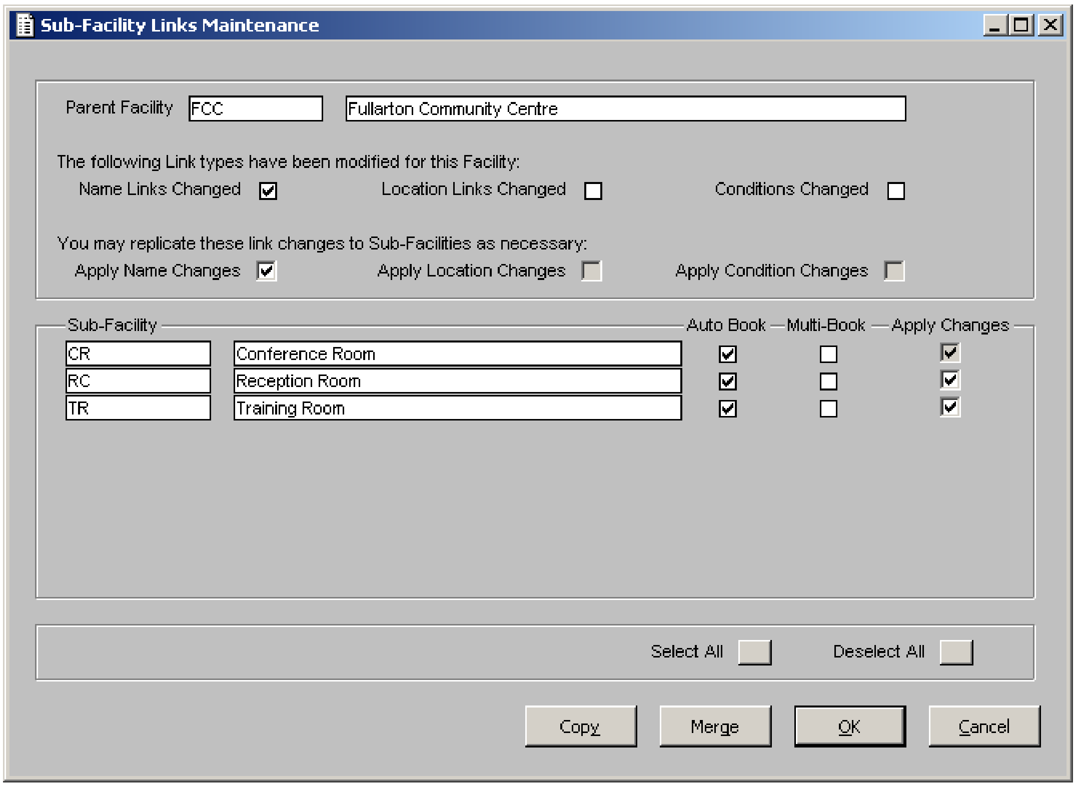
The Sub-Facility Links Maintenance form displays when changes have been made to Names, Locations or conditions linked to the Parent Facility. It gives the user the option of applying the changes to the associated Sub-Facilities as required.

Two options are available for the replication of the link data:

- “Merge” – The user may merge the link changes with the links that already exist on the Sub-Facilities. In this case, any links deleted from the Parent Facility will also be deleted from the Sub-Facility. Any links added to the Parent Facility will be added to the Sub-Facility. Any links that have been specifically created on the Sub-Facility, and did not exist on the Parent Facility, will be retained.
- “Copy” – The user may copy the link changes from the Parent Facility. In this case the links from the Parent will be replicated to the Sub-Facility exactly. Any links that have been specifically created on the Sub-Facility will not be retained.

Note that if the user presses the “OK” button without having made a choice, they will be prompted to select if they wish to ‘Merge’ or ‘Copy’ the changes.

It is not mandatory to apply the Parent Facility link changes. If required the user can take the ‘Cancel’ option to ignore this function and leave the Sub-Facilities ‘as is’. Cancelling this function does not cancel any changes made to the Parent Facility itself.



Sub-Facility Links Maintenance Form

Additional Notes regarding Conditions

Conditions are not 'linked' to a Facility or Sub-Facility in the same way that Names or Locations are. In the case of a Condition, the data that defines the Condition is stored on the link itself. So in order to determine if a Condition is the 'same as' or 'different from' the Parent and Sub-Facility, the process has to actually compare the data from the Condition. This includes the Description and Comment fields, but excludes the Apply Date and Lapse Date. This is because the Apply Date is always set to 'Today' whenever a Condition is added. With this in mind, if we used the Apply date in comparing Conditions, they would almost always appear to be 'different'. Therefore the Date fields are excluded. If a Condition is 'copied' from a Parent Facility to a Sub-Facility, and remains unchanged on the Sub-Facility, any subsequent maintenance of that Condition on the Parent would be copied to Sub-Facility. However, if the Condition was modified on the Sub-Facility, say the Comment field was changed, then any subsequent 'Merge' operation would create another Condition using the original data from the Parent.

Parent Facility

These fields display details of the Parent Facility. These fields are display only.

Modified Link Types Indicators

These indicators alert the user about any modifications made to the Links pertaining to this Facility. The Links displayed here are Name, Location and Conditions Links. These indicators are display only and cannot be maintained. The following options are displayed:

- Name Links Changed
- Location Links Changed
- Conditions Changed

Link Changes to Replicate

These indicators allow the user to nominate which Link changes they wish to copy from the Facility to the Sub-Facilities. Selection can be made by checking ON the appropriate checkbox. The following options are available:

- Apply Name Changes
- Apply Location Changes
- Apply Condition Changes

These checkboxes will be dimmed for those Link Types that have not been changed.

Sub-Facility/Auto-Book/Multi-Book/Apply Changes

These fields display all Sub-Facilities attached to the Facility. Adjacent to each Sub-Facility there are various checkboxes, as follows:

- Auto Book – indicates if the Sub-Facility has been set up to be automatically booked whenever its parent Facility is booked.
- Multi-Book – indicates if the Sub-Facility allows multiple Bookings.
- Apply Changes – The user is able to check this flag ON to control which Sub-Facilities are to have the Link changes applied. By default all these checkboxes are ON.

Select All/Deselect All

These buttons facilitate the selection and deselection of the 'Apply Changes' checkboxes. This becomes useful when there are numerous Sub-Facilities and the checkboxes may all be selected at once.

Copy button/Merge Button

Two buttons are available to facilitate the replication of the link data, as follows:

- The Merge function allows the changes made on the Parent Facility to be applied to the Sub-Facilities. Deletions and insertions from the Parent will be 'merged' with any existing links already on the Sub-Facility. This allows the Parent details to be replicated to the Sub-Facility whilst maintaining any links that are unique to the Sub-Facility.

- The Copy function, on the other hand, will directly 'copy' the links from the Parent. Any links on the Sub-Facility that are not on the Parent will be removed. This allows the Parent details to be replicated to the Sub-Facility exactly.

Note: If the user selects the OK button without having performed a 'Merge' or a 'Copy', the form will prompt the user to choose one or the other. If the user clicks on the 'Merge' or 'Copy' button inadvertently, then selecting 'Cancel' on the form will allow any changes to be reversed. It is not mandatory to apply the link changes; one or more Sub-Facilities may be deselected, or the whole process cancelled, if desired.

Sub-Facilities

The Sub-Facility option allows the creation of Sub-Facilities for the Parent Facility. This would occur when a hall etc may have multiple rooms that can be hired.

A Sub-Facility will have the same attributes as a Facility.

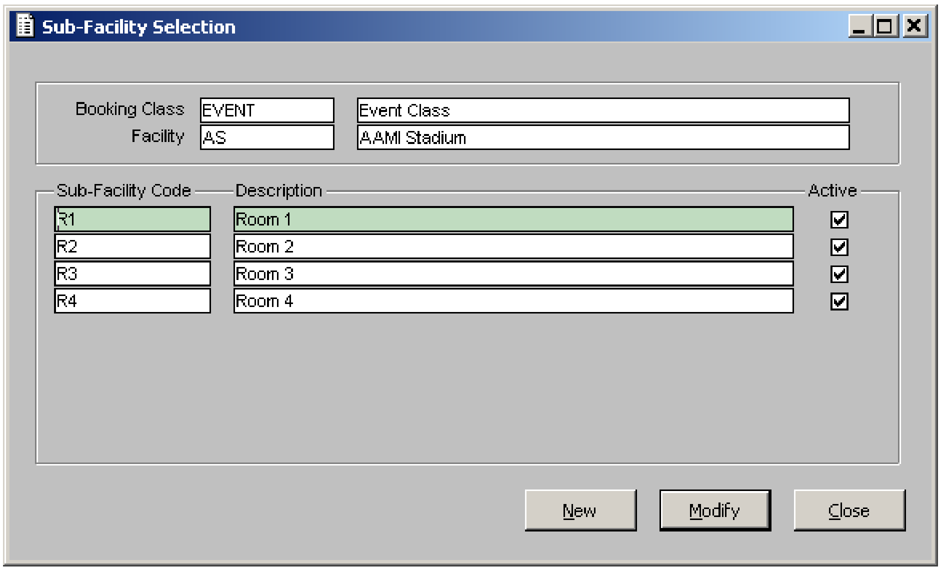
Sub-Facilities can *not* have their own Resources defined – they can only use Resources defined against the parent Facility.

Resources from the parent Facility will be available on the left-hand side of the form if:

- The "Allow Booking" flag is *on* in (Facility) Resource Maintenance.
- The "Allow Booking" flag is *off* AND the Resource has *not* been assigned to another Sub-Facility.

Sub-Facility Selection Form

The Sub-Facility Selection form allows the user to create a new Sub-Facility or maintain an existing one.



Sub-Facility Selection form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the Parent Facility, e.g. AS, AAMI Stadium.

Sub-Facility Code/Description

These fields display details (Code and Description) of the Sub-Facilities available for selection, e.g. R1, Room1.

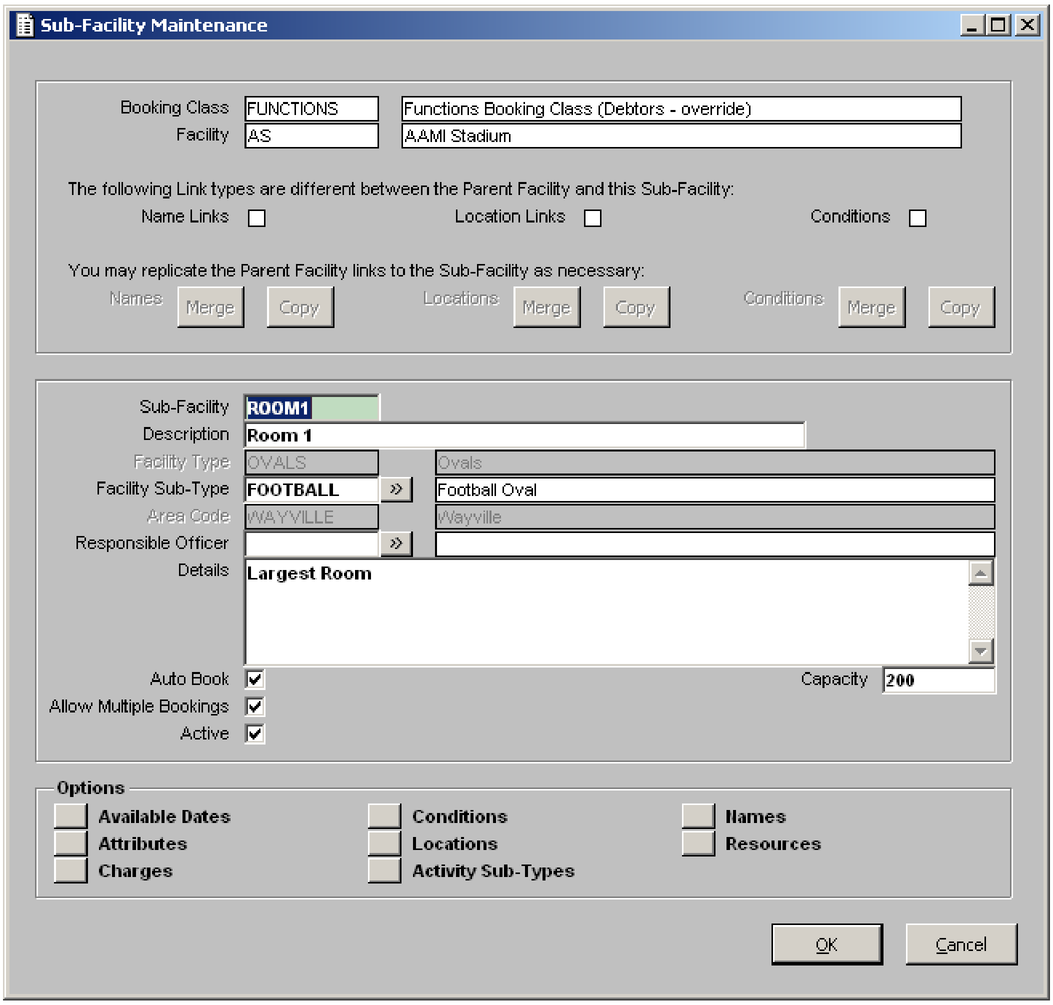
Active Indicator
This flag is an On/Off indicator which displays whether the Sub-Facility is active and available for use.

Sub-Facility Maintenance Form

The Sub-Facility Maintenance form allows the creation of a new Sub-Facility or the maintenance of an existing one. It also gives the user an indication of when any of the Names, Locations or Conditions on the Sub-Facility differ from the equivalent links on the Parent Facility, and offers a mechanism for replicating those differences to the Sub-Facility.

When a new Sub-Facility is created, the following data will be defaulted from the Parent Facility and the respective Option buttons will become bolded:

- Available Dates
- Conditions
- Locations
- Names



Sub-Facility Maintenance form

Maintaining Links
This form provides an indication of which link types differ between the Parent and the Sub-Facility. For each differing link type a pair of option buttons is provided to allow the user to replicate the differences from the Parent Facility to the Sub-Facility.

Two options are available for the replication of the link data:

- "Merge" – The user may merge the Parent Facility links with the links that already exist on the Sub-Facility. In this case any links that exist on the Parent Facility and not on the Sub-Facility, will be added to the Sub-Facility. Any links that exist on the Sub-Facility and do not exist on the Parent Facility will be retained.
- "Copy" – The user may copy the links from the Parent Facility. In this case the links from the Parent will be replicated to the Sub-Facility exactly. Any links that have been specifically created on the Sub-Facility will not be retained.

Note: It is not mandatory to apply any Parent Facility link differences. It is up to the user to determine if the differences are acceptable.

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the Parent Facility, e.g. AS, AAMI Stadium.

Link Information/Replication

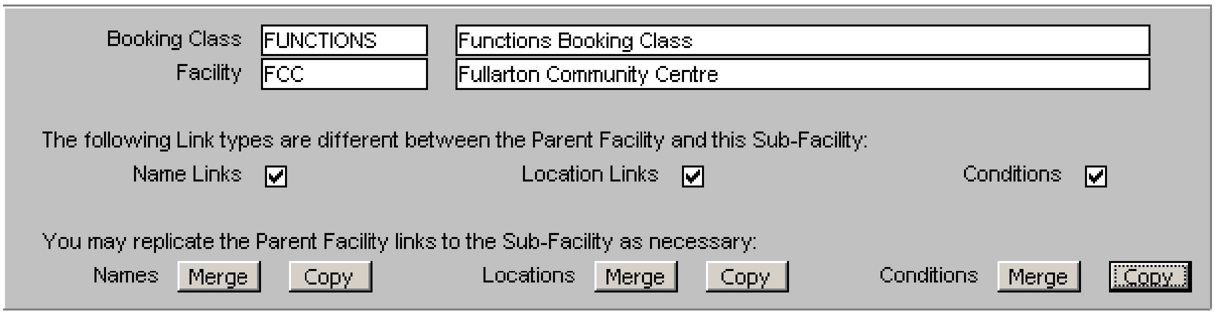
The buttons and indicators in this section of the form provide an indication of which link types differ between the Parent and the Sub-Facility. For each link type there is a 'Copy' and a 'Merge' button provided to allow the user to replicate the differences from the Parent Facility to the Sub-Facility. These buttons will be dimmed if there are no differences.

The 'Merge' function allows differences on the Parent to be applied to the Sub-Facility. Unlike the Facility Maintenance option, where it is known which individual links have been removed or added to the Parent, the 'Merge' function on this form is only able to 'Add' new links to the Sub-Facility that are on the Parent Facility. This is because the 'Merge' function always retains any links that are specifically defined on the Sub-Facility, so only additional links are created in this case.

The 'Copy' function, on the other hand, will directly 'copy' the links from the Parent. Any links that are not on the Parent will be removed. This allows the Parent details to be replicated to the Sub-Facility exactly.

Note: It is not mandatory to apply the link differences. Also, if specific links have only been added to a Sub-Facility and do not apply to the Parent, the 'Difference' checkboxes will always be shown, but can be ignored.

Note: The 'Merge' and 'Copy' buttons are intentionally not included in the normal Tab sequence on the form. However, if the cursor is specifically positioned in the header frame fields or the buttons, then the sequence will tab back and forth through the buttons.



Section of the Sub-Facility Maintenance form showing Link information

See Maintaining Links and Sub-Facility Links Maintenance for further details.

Sub-Facility Code/Description

The Code field allows a 10 character Facility Code to be entered, e.g. R1 or ROOM1. This field is mandatory.
The Description field allows a 50 character description to be given to the Sub-Facility, e.g. Room with Stage. This field is mandatory.

Facility Type

The Parent Facility Type is defaulted into this form from the Parent Facility details and cannot be maintained, e.g. OVAL

Facility Sub-Type

A Sub-Facility Type Code may be keyed in or, alternatively, selected from the Pop Up, e.g. F, Football Oval.

Area Code

The Area Code is defaulted into this form from the Parent Facility details and cannot be maintained. If the Area Code for the Parent Facility is modified, then the Area Code of the Sub-Facility is also updated.

Responsible Officer

The Responsible Officer field allows Council to allocate a Responsible Officer who is to be nominated for a Booking. This is used for Bookings made via ePathway where a specific person within Council needs to be allocated responsibility. If a Responsible Officer is set up at the Activity Sub-Type level, then it will override a Responsible Officer which has been set up at the Activity Type level. If a Facility nominated for the 'first' Booking Line has a default Responsible Officer, then this Officer will override any that already exist on a Booking. Additionally, the Responsible Officer set up at the Sub-Facility level will override one set up at the Facility level. If no Responsible Officer has been set up as a default at any of these levels then the Responsible Officer for the Booking will be set to the currently logged on user.

Note: The above functionality only applies to Booking Requests lodged via ePathway. In Pathway, the Responsible Officer is always the Receiving Officer (i.e. the Officer taking the Booking) unless manually changed. When changes are made on a Booking Line or to the Activity Type by a different officer from the one who originally took the booking, the Responsible Officer does not get automatically changed. The original Officer remains with the booking unless manually overridden in the case where reassignment of the booking becomes necessary.

Details

This is a free format unlimited size text field that allows the user to enter a description of the Sub-Facility. These details are not defaulted from the parent Facility details, as it is assumed that the details required against the Sub-Facility will be different from those of the parent.

Auto Book

This field is used to determine whether the Sub-Facility should automatically be booked if the parent facility is booked. This will be an On/Off indicator and default to ON.

If a Sub-Facility has 'Auto Book' set on, then checks are performed on the availability of the sub-facilities to ensure that they can be booked along with the Facility. When a Facility is being booked, bookings will automatically be created for the Sub-Facilities and inherit the same properties as the booking that is being entered.
If a Parent Facility is being booked and a Sub-Facility is already booked then the booking will not be allowed and an error message will display.

When a Sub-Facility is being booked, checks are made against the other sub facilities and if bookings exist in the other sub facilities, then these are displayed to the user

Capacity

This field is an optional numeric field and allow the user to enter the maximum number of persons that the Sub-Facility can accommodate. This is an information only field and is not used to drive any processing. This will enable bookings to be made where a Customer wants to find a hall that can accommodate more than 50 people.

Allow Multiple Bookings
If there are existing current bookings at the time the Facility is requested then the booking will not be allowed unless this flag is checked ON. If this flag is OFF, then an error message will display where a booking is being made and it clashes with another booking. This flag determines whether the Sub-Facility may be booked multiple times for the same dates and times. If the Facility has “Allow Multiple Bookings” checked on, then a Warning message will display to the user if a Booking already exists. The Warning message will read “Bookings already exist for the nominated Date and Time. Continue with Booking?” The options available are “Ok”, “Cancel” and “View Bookings”. If OK is taken, the booking is accepted. If Cancel is taken then the Booking will not be made and the user will be returned to Booking Maintenance to change the Facility. If View Bookings is taken the user will be presented with the Bookings that have been made for the Date and Time

Active
This flag is an On/Off indicator which determines whether the Sub-Facility is active and available for use.

Options – Availability Dates
Selection of this button displays the Facility Available Date Maintenance form where the user can define the days and times that the Sub-Facility is available for hire. This allows the user to nominate which days, Monday through to Sunday that the Sub-Facility is available. Against each day the nomination of the times that the Sub-Facility is available may be define, i.e. From Time and To Time fields may be defined. This operates on 24 hour time and is mandatory if the Facility is available on a given day. If the Facility is available 24 hours a day, then the user will enter 00:00 to 23:59. For example, some halls may only be for hire Monday to Friday between the hours of 8am and 6pm. These details may be recorded so that bookings cannot be made outside these times. By default when a new Sub-Facility is entered, it will default the dates and times defined at the Parent Facility.

If the Parent Facility Dates and Times are changed, the user needs to manually change the Booking Availability details against the Sub-Facility by accessing the Sub-Facility and amending the Booking Availability details.

Options – Charges
Selection of the Charges button displays the Facility Charge Search Profile where the user may set up and maintain Fees associated with a Sub-Facility.

> Note: This button will be hidden if the Parent Facility has been flagged for ‘Internal Bookings Only’, because Charges will not apply in this situation.

Charges can be defined for each Sub-Facility where the Class Parameter ‘Allow Fees against Facilities” has been set ON. These will only take effect if the Parent Facility is not linked to a Booking., i.e. if the Parent Facility is booked, and the Sub-Facilities are automatically booked then the costs will be derived from the Parent Facility only.

A Sub-Facility can have many charges. A Charge is created using Fee Codes defined at the Class level. The processing of Sub-Facility charges is the same as the Charge processing for Facilities. Bonds can be applied to Sub-Facilities.

> Note: Fees at the Parent Facility level should be a total of all the sub-facility charges, where sub-facilities are automatically booked.

Options – Conditions
Selection of this button displays the Facility Conditions Maintenance form where the user may set up and maintain Conditions associated with a Sub-Facility.

Options – Facility Attribute
Selection of this button displays the Facility Attribute Selection form where the user may assign Attributes to the Sub-Facility.

Options – Location
Selection of this button displays the Location Link Maintenance form where the user may maintain Property and Street./Suburb Locations associated with the Sub-Facility. Any Properties and Street/Suburb records already linked to the Parent Facility will default into this form. Conversely, if new ones are added here they will also apply to the Parent Facility.

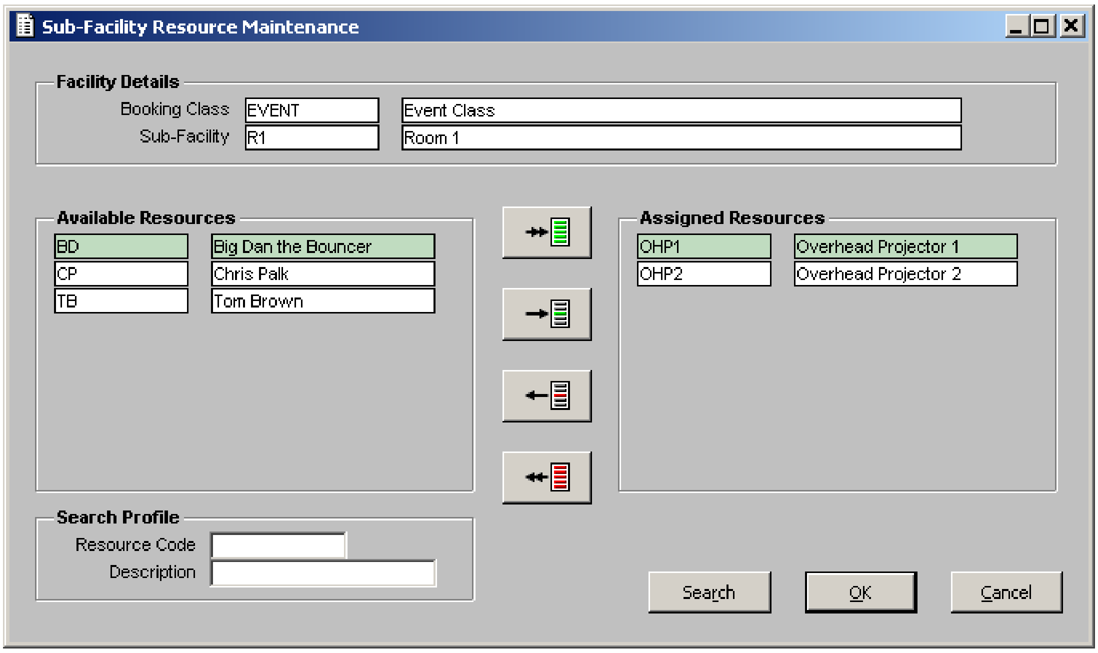
Options – Activity Sub-Types
Selection of this button displays the Facility Activity Sub-Type Maintenance form where the user may select Activity Sub-Types to associate with the Sub-Facility.

Options – Names
Selection of this button displays the Facility Name Role Maintenance form where the user may link Name Role types to the Sub-Facility.

Options – Resources
Selection of this button displays the Sub-Facility Resource Maintenance form where the user may assign Resources to the Sub-Facility.

Sub-Facility Resource Maintenance Form

The ability to link one or many Resources to a Sub-Facility is available. The available set of Resources are sourced from the Resources defined against the Parent Facility where the "Available to Sub-Facility" option has been checked on.



Sub-Facility Resource Maintenance form

Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Sub-Facility
These fields display details of the Sub-Facility, e.g. R1, Room 1.

Available Resources

These fields list the Available Resources for the Sub-Facility. The Resources available would be those set up for the Parent Facility. To assign a Resource, focus on the Resource Code and Description and click the Select button. To unassign a Resource, focus on the Resource Code on the Assigned side and click the Remove button.

Assigned Resources

These fields list the Resources that have been assigned to the Sub-Facility. To assign a Resource, focus on the Resource Code and Description on the Available side and click the Select button. To unassign a Resource, focus on the Resource Code on the Assigned side and click the Remove button.

Search Profile – Resource Code/Description

Enter, or select from the Pop Up, a Resource Code and/or Description on which to base your search

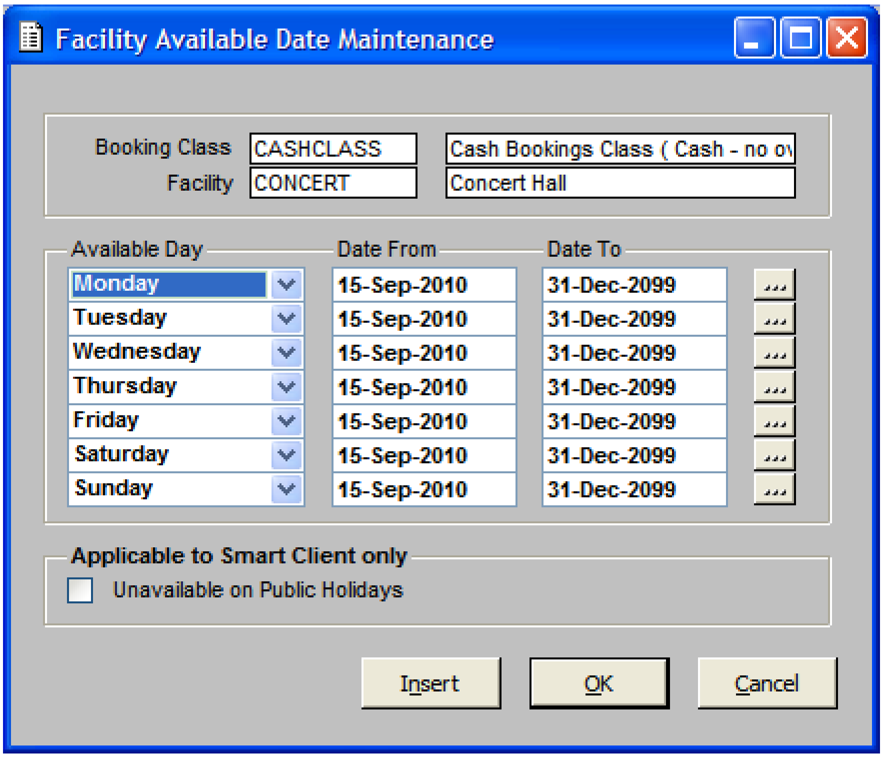
Booking Availability

An option to define the days and times that the Facility is available for hire is provided. This allows the user to nominate which days, Monday through to Sunday that the Facility is available. Against each day the nomination of the times that the Facility is available may be defined, i.e. From Time and To Time fields may be defined. This is based on 24 hour time and is mandatory if the Facility is available on a given day. If the Facility is available 24 hours a day, then the user will enter 00:00 to 23:59. For example, some halls may only be for hire Monday – Friday between the hours of 8am and 6pm. These details will be able to be recorded so that bookings cannot be made outside these times. By default when a new Facility is entered, it will be defined as being available Monday through to Sunday, 24 hours per day. Users will be required to amend these dates and times only where these available times differ. If a day is not available for booking then the time fields will not be available.

Facility Available Date Maintenance Form

This form allows a council to set up booking availability dates and date ranges for particular Facilities. No overlapping of dates is permitted. Each day and time range that has been entered here will be defaulted as the dates and times that Hourly charges apply for the Facility.

By default, when a new Facility is entered, it is defined as being available Monday through Sunday, 24 hours per day. Users are then required to amend these dates and times where these available times differ. If a day is not available for booking the time fields will not be available.



Facility Available Date Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the Facility, e.g. AS, AAMI Stadium.

Available Day
Select a day of the week from the dropdown. The options available are:

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Date From/Date To
These fields allow the user to enter a date range specifying the availability date range for the Facility. .

Detail Button
Availability may be further defined by accessing the detail button and entering details into the Available Time Maintenance form.

Unavailable on Public Holidays
A new 'Unavailable on Public Holidays' checkbox is available (as of Release 3.06). This checkbox is used for the Facilities Calendar to determine if a Facility is unavailable on a Public Holiday. Whilst the flag is controlled via the thick client, the effect is only seen in the smart client.

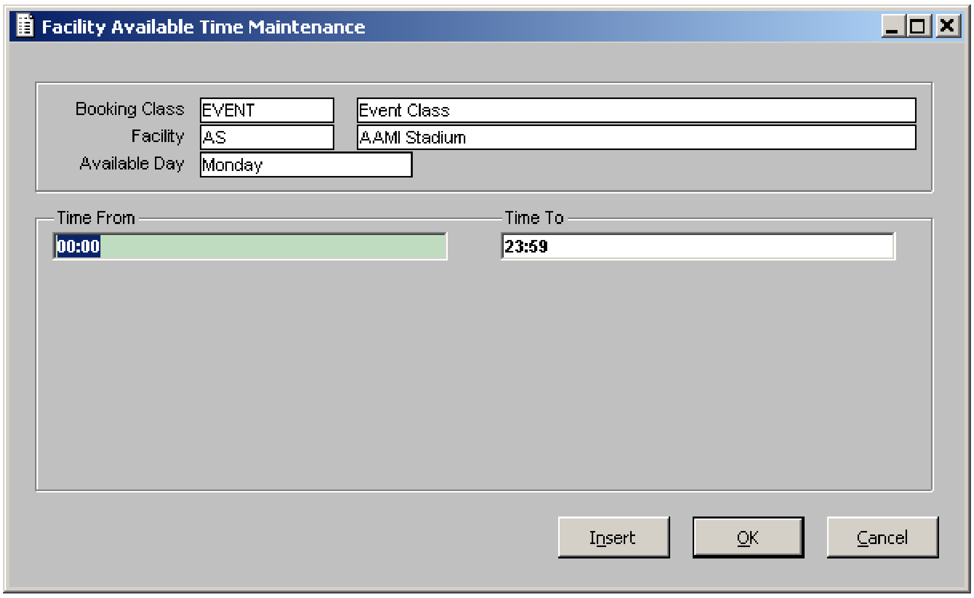
If this parameter is set on for a Booking Facility:

a) Items indicating unavailability of the Facility will be displayed in the Calendar where a Public Holiday occurs on a day where the Facility would be otherwise available.

b) If the otherwise available Facility is selected/entered against a Booking Line for a date which is a Public Holiday, a message indicating unavailability will be displayed. The Booking Line cannot be accepted when this occurs.

Facility Available Time Maintenance Form

The Available Time Maintenance form allows various times to be set up for each specified available day. Time must be entered in 24 hour format (00:00 – 23:59). No overlap of hours is allowed.



Facility Available Time Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the Facility, e.g. AS, AAMI Stadium.

Available Day

This field displays the selected available day to which the Time range will apply.

Time From/Time To

Enter a Time range in these fields in 24 hour format (i.e. 00:00 – 23:59). This Time range will determine the available booking hours for the Facility. No overlap of hours is permitted. However, the end time of one available time range can be equal to the start time of the next available time range, e.g.
08:00 – 12:00
12:00 – 17:00
17:00 – 23:59

Note: Because a 24 hour clock is being used, 'Midnight' must be indicated by using 23:59. However, when calculating duration values, the system will assume 23:59 to be midnight and will add an additional minute to the calculation.

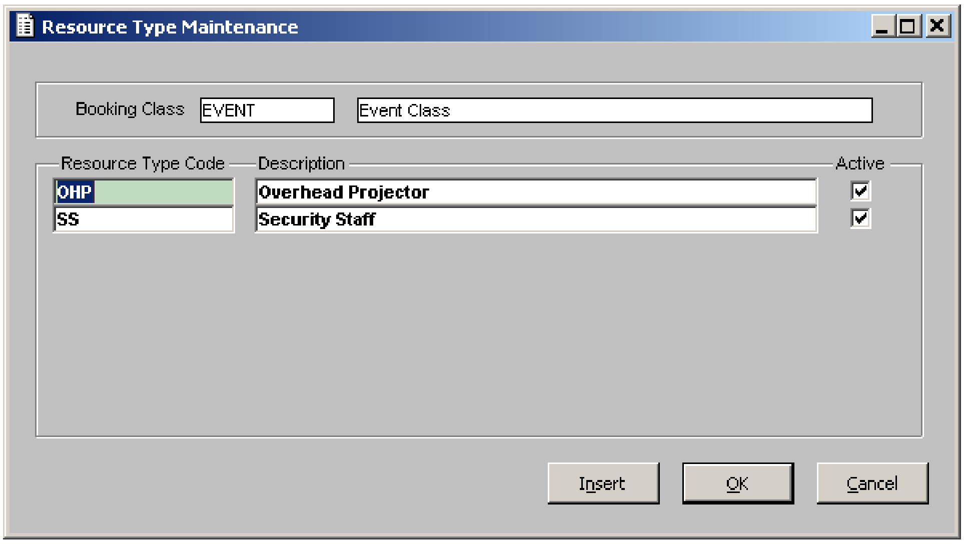
Warning: Any changes to Available Days or Available Times must be followed by a review of the Charges related to these Days/Times. These will not be updated automatically.

Resource Types

Resource Types define the category of a Resource which is able to be associated to a Facility. The Resource Type is added to a Booking Class. Examples of Resource Types could be Staff, Equipment etc.

Resource Type Maintenance Form

This form allows Resource Types to be set up against a Class. This allows Resources to be added based on a particular Resource Type, e.g. The Resource Type of 'Overhead Projector' would include Resources such as OHP1, OHP2 etc.



Resource Type Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Resource Type Code/Description

These fields allow a Code and Description to be entered to define a Resource Type. The Resource Type Code field allows up to 10 alphanumeric characters, while the Description field allows up to 50 characters. Both fields are mandatory.

Active Indicator

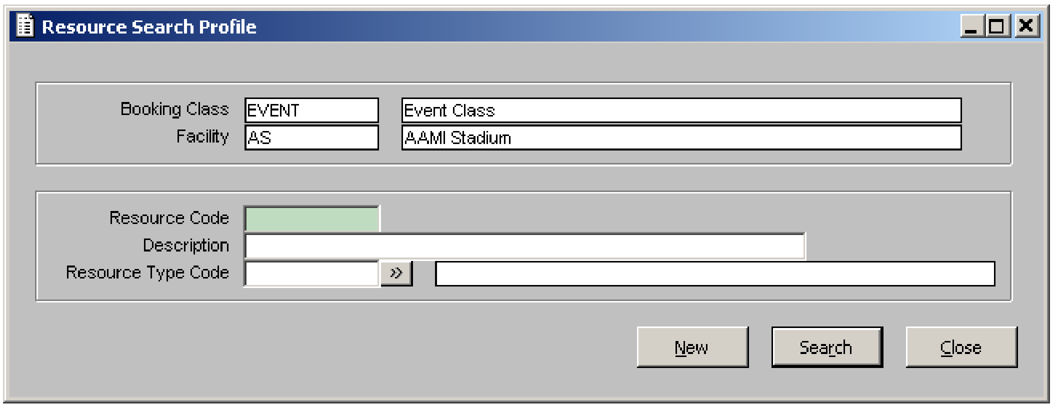
This flag is an On/Off indicator which determines whether the Resource Type is active and available for use.

Resources

One or many Resource Types are able to be added against a Facility. Once a Resource Type is added, specific details about the Resource are able to be added. A Facility may have more than one Resource for each Resource Type, e.g. Resource Type is Overhead Projector. There may be 2 or 3 of these available in a specific Facility. Each of these will be able to be defined against the Facility as a Resource.

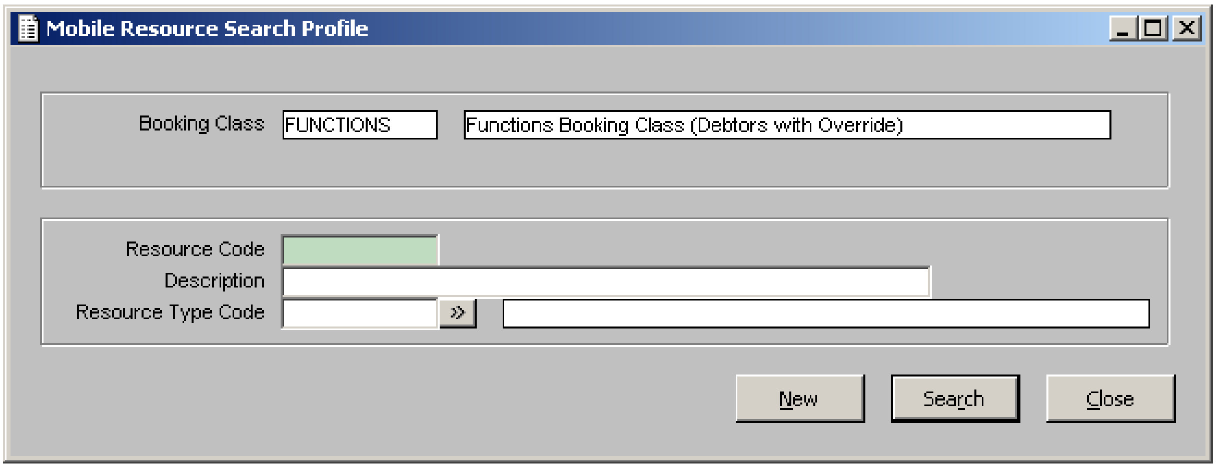
Resource Search Profile Form

The Resource Search Profile allows the user to add a new Resource or search for an existing one.



Resource Search Profile form

The Mobile Resource Search Profile does not include any Facility Details as a Mobile Resource may be shared between all Facilities.



Mobile Resource Search Profile form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the Facility.

Resource Code/Description

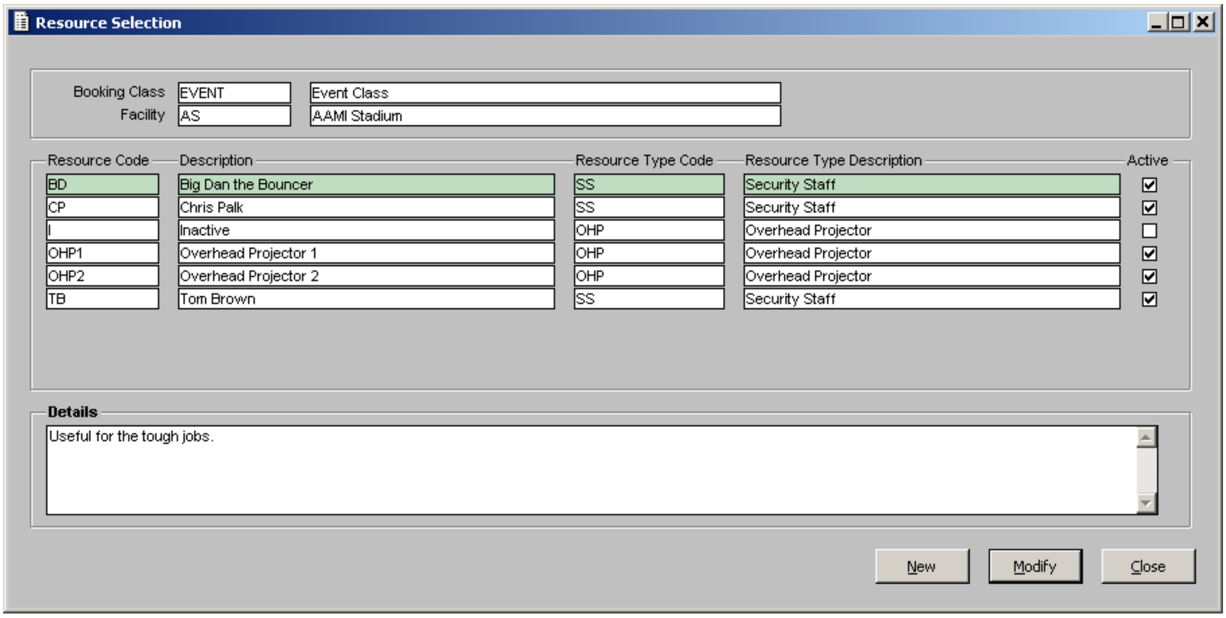
Enter a Resource Code and/or Description on which to base your search and then select the Search button.

Resource Type Code

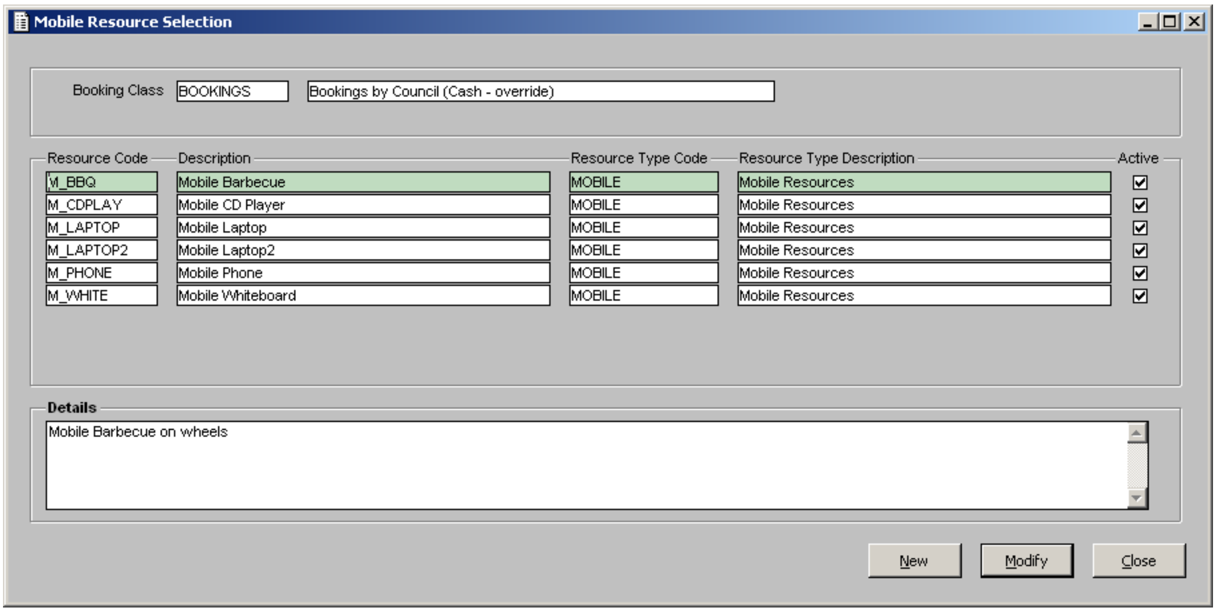
Enter a Resource Type Code and/or Description on which to base your search (or select one from the Pop Up) and then select the Search button.

Resource Selection Form

The Resource Selection form allows a new Resource to be added or an existing one modified.



Resource Selection form



Mobile Resource Selection form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the Facility, e.g. AS, AAMI Stadium.

Resource Code/Description

These fields display the Resource Code and Description of the Resource, e.g. OHP1, Overhead Projector 1.

Resource Type Code/Description

These fields display the Resource Type Code and description to which the Resource belongs, e.g. OHP, Overhead Projector.

Active

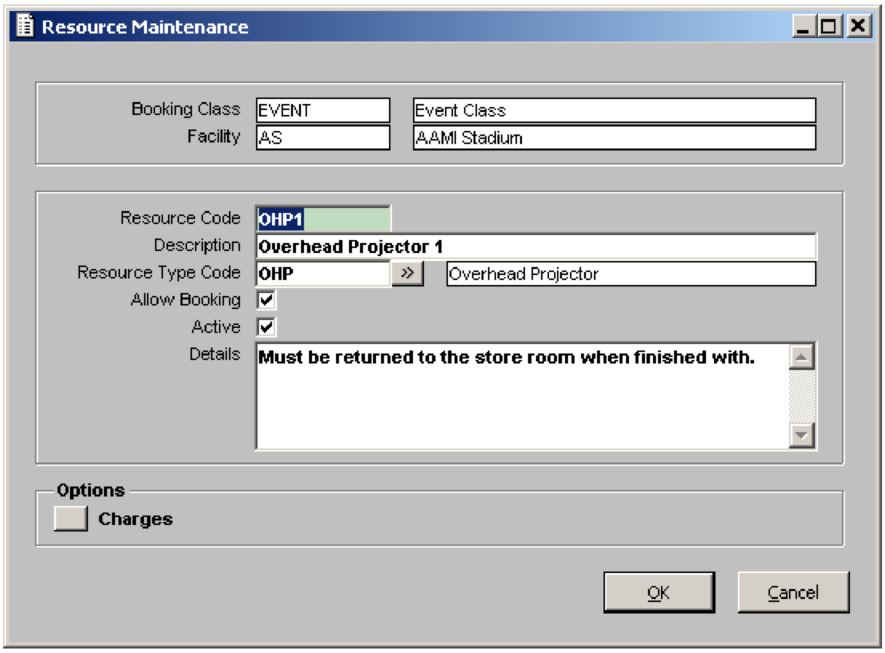
This flag is an On/Off indicator which indicates whether the Facility Sub-Type is active and available for use. This flag is not maintainable from this form.

Details

The Details field displays the Details as entered in the Resource Maintenance form, e.g. IBM PC with monitor, keyboard and mouse. It is display only and cannot be maintained.

Resource Maintenance Form

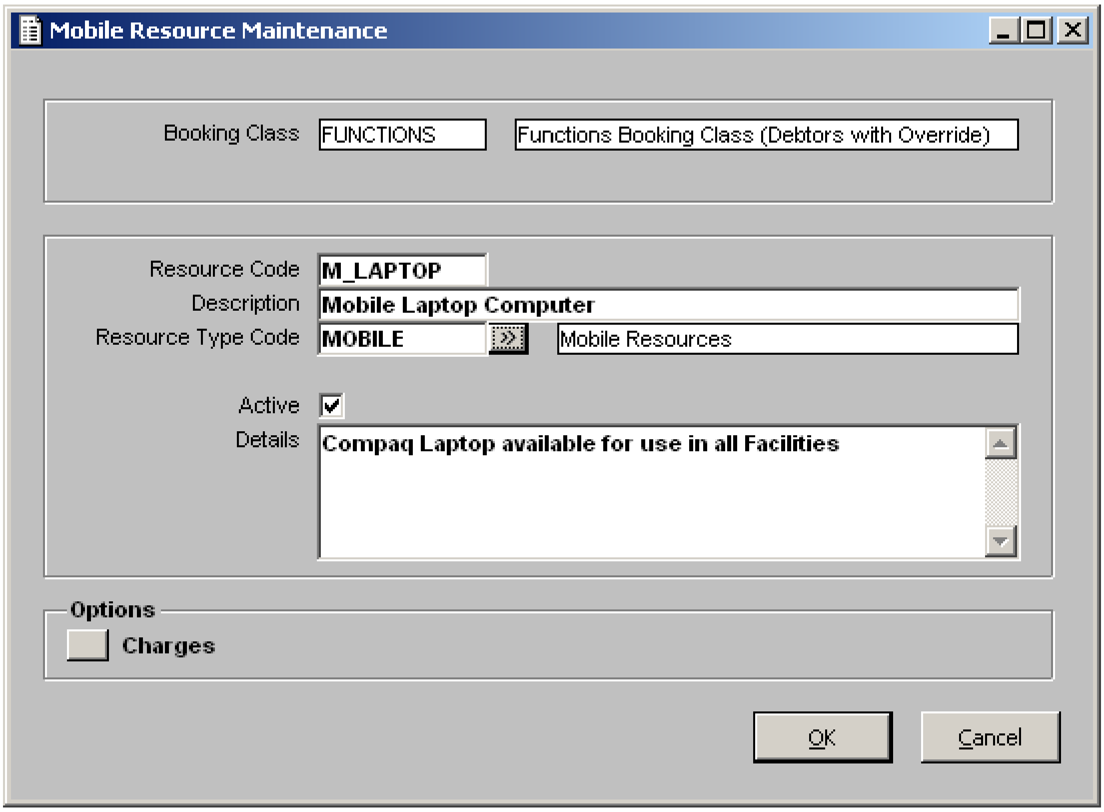
This form allows the user to create new Resources against a Facility or maintain existing ones. It also allows Charges to be allocated to each Resource.



Resource Maintenance Form

The Mobile Resource Maintenance form does not have a Facility details field as Mobile Resources are available across all Facilities within a Booking Class.

In addition, the ‘Allow Booking’ flag has been removed as it is assumed that the Mobile Resource is allowed to be booked if it is Active. In the case of a Mobile Resource being unavailable due to maintenance, then a Facility (e.g. Maintenance) will need to be created and the Resource assigned to this Facility for the duration of the maintenance/repair. In this instance the Resource will display on the Resource Calendar.



Mobile Resource Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the selected Facility, e.g. AS, AAMI Stadium.

Resource Code/Description

The user may key in a code and description to define the Resource, e.g. OHP1 – Overhead Projector 1.

Resource Type Code

A Resource Type Code may be keyed in or alternatively, selected from the Pop Up (Resource Types must already be set up in Booking Class Parameters).

Allow Booking

This is an On/Off indicator to indicate whether a Resource is moveable or attached, for example, to a Sub-Facility.

Note: 'Allow Booking' would be set to ON for Resources that can be moved around from Facility to Facility, e.g. Moveable white board etc. For Resources that are physically attached to the Facility this option will be set to OFF.

Resources from the parent Facility will be available on the left-hand side of the Sub-Facility Resource Maintenance form if:

- The "Allow Booking" flag is *on* for the Facility Resource.
- The "Allow Booking" flag is *off* AND the Resource has *not* been assigned to another Sub-Facility.

Note: Any Resources which have the 'Allow Booking' flag turned OFF will only be available for selection by the Parent Facility and one (1) Sub-Facility at the Booking Entry level. As such, when Resources are being allocated on a Booking Line, the Resource will not appear in the Available Resources list for selection by any of the other Sub-Facilities.

Note: The 'Allow Booking' indicator is not included on the Mobile Resource Maintenance form as it is assumed that a Mobile Resource is available unless it is booked out to a Facility.

Active
This flag is an On/Off indicator which determines whether the Resource is active and available for use.

Details
This field is an unlimited text field which allows details relating to the Resource to be entered.

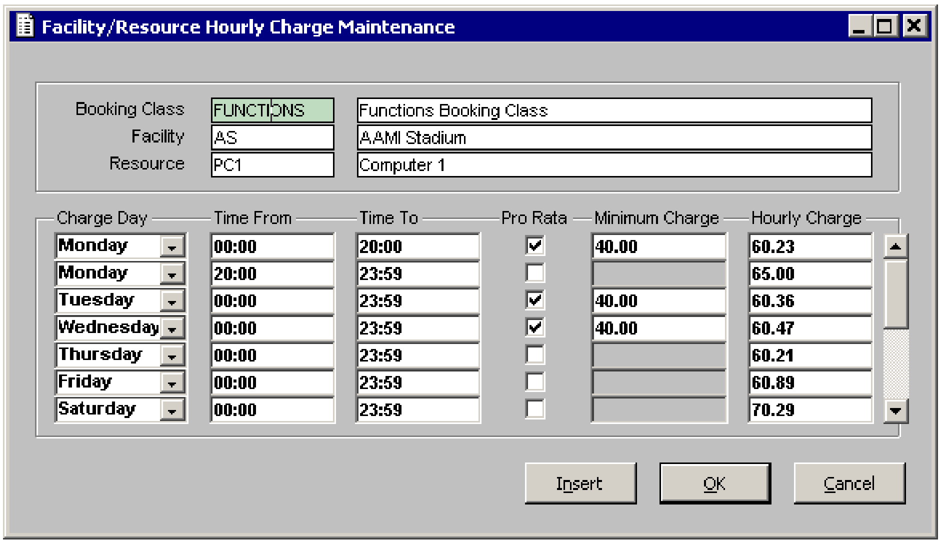
Options – Charges
Selection of the Charges Option button displays the Resource Charge Search Profile where charges may be set up and maintained for each Resource.

Facility/Resource Hourly Charge Maintenance form

This form displays if Hourly Fee Type is selected in the Resource Charge Maintenance form. This will allow the user to define charges based on From and To dates, different charges for different days of the week, Start and End Times, Pro Rata eligibility as well as minimum charges and the standard hourly charge.

Users are required to add days and rates as required, e.g. the user may set an Hourly Fee Charge for usage of an Overhead Projector between Monday to Friday 9am and 5pm and then assign a different rate for Monday to Friday 5.01pm till 11:59pm, and a different rate from Saturday 12:00am till 9am. In this way the user will be able to charge at different rates on the booking based on the time that the Resource is being used.

If there is no cost to use the Resource at certain times then the rate entered will be zero dollars. The rate entered will be a monetary field. Note that no overlap of hours is allowed when setting these details, i.e. costs will not be able to be defined for 9:00 to 17:00 and then 16:00 to 19:00. However, a time range such as 9:00 to 17:00 and then 17:00 to 23:00 is acceptable.


Facility/Resource Hourly Charge Maintenance

Booking Class	FUNCTIONS	Functions Booking Class
Facility	AS	AAMI Stadium
Resource	PC1	Computer 1

Charge Day	Time From	Time To	Pro Rata	Minimum Charge	Hourly Charge
Monday	00:00	20:00	☑	40.00	60.23
Monday	20:00	23:59	☐		65.00
Tuesday	00:00	23:59	☑	40.00	60.36
Wednesday	00:00	23:59	☑	40.00	60.47
Thursday	00:00	23:59	☐		60.21
Friday	00:00	23:59	☐		60.89
Saturday	00:00	23:59	☐		70.29

Insert OK Cancel

Facility/Resource Hourly charge Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

These fields display details of the selected Facility, e.g. AS, AAMI Stadium. They are display only and cannot be maintained.

Resource

These fields display details of the Resource, i.e. Code and Description.

Charge Day

These fields display the Charge Day during which the appropriate Fee Charges will apply. The options are:

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Time From/Time To

These fields allow a range of hours and minutes to be entered during which a Resource is available for booking, by day, in 24 hour format e.g. 00:00 – 23:59. (Note that midnight is represented by the value 23:59)

Pro-Rata

A “Pro-Rata” option is available for each Hourly rate entered. This will determine whether the Hourly cost can be Pro-Rated. If this option is set on, then the user can optionally enter a value in the “Minimum Charge” field.

When the cost is calculated, if Pro-Rata is in effect, then if the calculated amount is less than the minimum charge, then the minimum charge will be applied.

Minimum Charge

This field allows the user to enter a Minimum Charge amount. This field becomes available when the Pro Rata flag is checked ON.

When the cost is calculated, if Pro-Rata is in effect, then if the calculated amount is less than the minimum charge, then the minimum charge will be applied.

Hourly Charge

This field allows an amount to be entered as the hourly charge to apply within the Date/Time range specified.

An example to describe how Hourly charges will be applied is provided below.

> Example
> A booking is made for a resource from Friday 3pm till Sunday 5pm.
>
> The rates are set up as follows:
> Friday 9.00 – 17:00 $10
> Friday 17:00 – 23:59 $15
> Saturday 00:00 – 23:59 $20
> Sunday 00:00 – 23:59 $20
>
> The number of hours will be calculated and charged as follows.
> Friday 15:00 – 17:00 = 2 hours @ $10 per hour = **$20**

Friday 17:00 – Friday midnight = 7 hours @ $15 per hour = **$105**
Saturday 00:00 – Saturday midnight = 24 hours @ $20 per hour = **$480**
Sunday 00:00 – Sunday 17:00 = 17 hours @ $20 per hour = **$340**

This provides the total cost for the booking at **$945**.

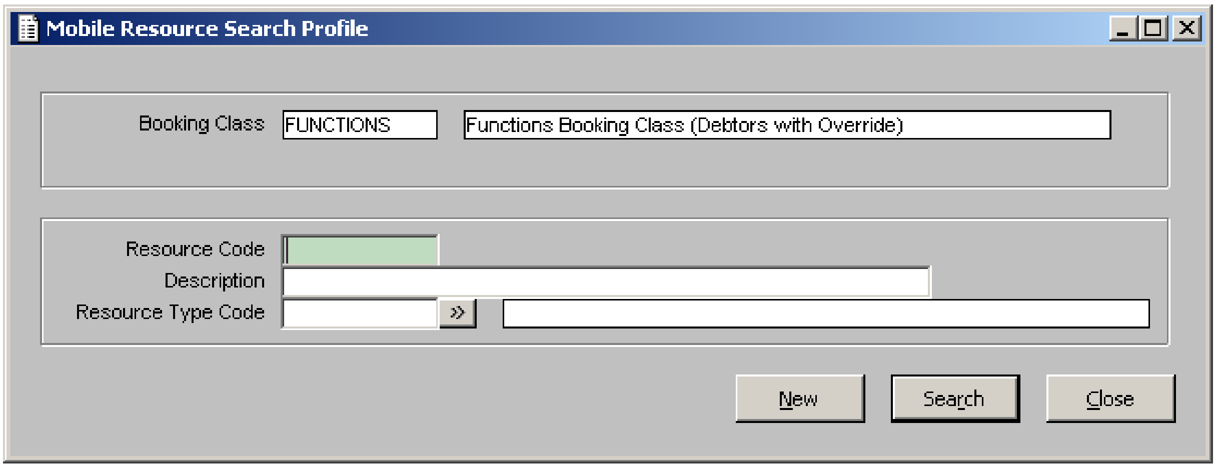
Mobile Resources

** **Note**: This is an authorised function. This means that the functionality will only be available if you are authorised to use it. If customers do not have this option and require the functionality then it is advisable that they contact their account manager to organise the purchase of this function.

The Mobile Resources function has been developed to allow Resources that are not specifically linked to a Facility to be created and subsequently booked. These Resources can be moved from Facility to Facility as required.

Mobile Resource Search Profile Form

The Mobile Resources search Profile form allows new Mobile Resources to be created or existing ones retrieved.



Mobile Resource Search Profile form

Fee Codes

Each Class allows the definition of one or many Fee Codes. Fee Codes allow the selection of the required account details that apply for each fee. Fee Codes can then be associated with the appropriate Facility or Activity Type, based on the "Allow Fees Against Facilities" or "Allow Fees against Activity Type" settings.

Note: The creation of a Fee Code in the Bookings Management module will automatically create a corresponding Fee Code in Debtors. Fee Codes created in Debtors from the Booking Module are not maintainable from Debtors. The maintenance of the Fee Code must be performed via Bookings Management.

Note: The Fee Code accounts and the Charge Override account must be in the default Debtors Ledger.

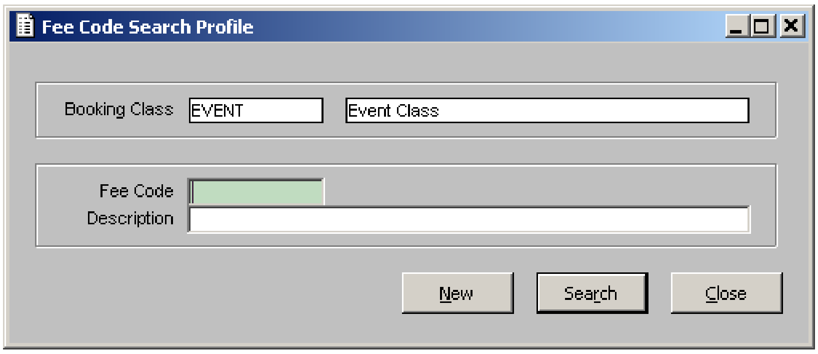
Discount
To enable Discount to be accounted for separately, via the Debtors Module, an extra Ledger Account needs to be specified on each Fee Code. This additional account is optional, and if specified will cause the Invoicing and Credit Note processing to perform special processing for Discounts.

Note: When dealing with multiple Credits against a Fee it is possible for rounding errors to creep in resulting in a difference over the whole Invoice of one cent. To ensure this does not happen, Pathway will detect when you are raising a Credit for the entire remaining Invoiced Amount, and will make the adjustment here. This means that you might get a one cent difference between a manual calculation and the value calculated by the system on the last Credit. The important thing is that all the Credit Revenue Amounts and all the Credit Discount Amounts must add up to the original Revenue and Discount Amounts from the Invoice.

See Account Details.

Fee Code Search Profile

The Fee Code Search Profile allows the user to create a new Fee Code or search for an existing one.



Fee Code Search Profile form

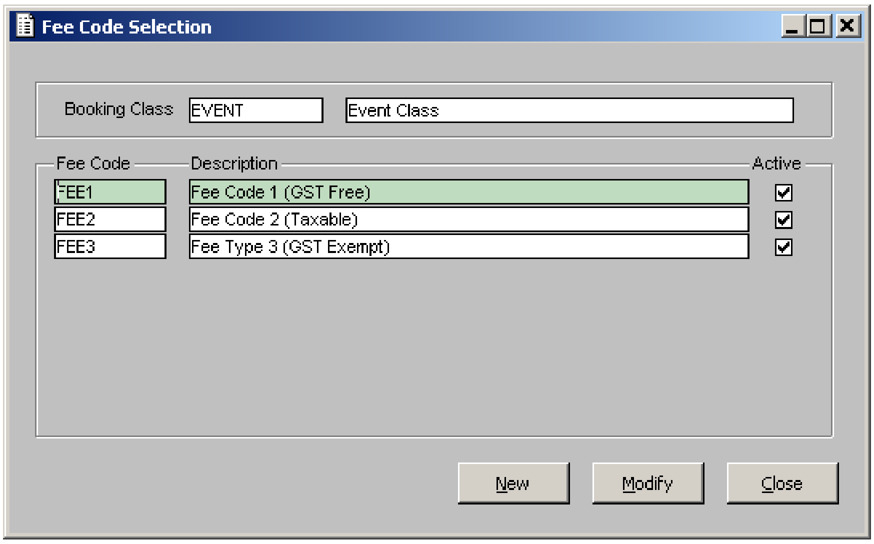
Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Fee Code/Description

Enter a Fee Code and/or Description on which to base your search and then select the Search button.

Fee Code Selection Form

The Fee Code Selection form will display if there is more than one Fee Code defined. It allows the user to create new Fee Codes or maintain existing ones.



Fee Code Selection Form

Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Fee Code/Description
These fields display details (Code and Description) of any existing Fee Codes. These fields are display only.

Active
The Active flag indicates whether a Fee Code is active and available for use. This flag is not maintainable from this form.

Fee Code Maintenance Form

The Fee Code Maintenance form allows a council to define one or many Fee Codes which can be associated to different accounts. These Fee Codes may then be associated with Facilities or Activity Types based on the “Allow Fees against Facilities” or “Allow Fees against Activity Type” settings.

Note: The creation of a Fee Code in the Bookings Management module will automatically create a corresponding Fee Code in Debtors. Fee Codes created in Debtors from the Booking Module are not maintainable from Debtors. The maintenance of the Fee Code must be performed via Bookings Management.

The Fee Code accounts and the Charge Override account must be in the default Debtors Ledger.

NEW ZEALAND TAX CHANGES

Enhancements have been made to the Bookings module to cater for a change in GST scheduled to occur on the 1st of October 2010.
The Bookings module has been modified to calculate the tax rate applicable to a Booking based on the earliest transaction date for the booking line. All fees and adjustments for the Booking will have tax calculated at this tax rate except where the new ‘Tax Override’ flag is turned on for the Fee Code, see below for details. The earliest transaction date being the date the first fee was added to the booking line.

<u>Councils are required to ensure the following tasks are performed prior to 01/10/10 in order for the earliest transaction date to produce the same tax rate as the earlier of payment and invoice date.</u>

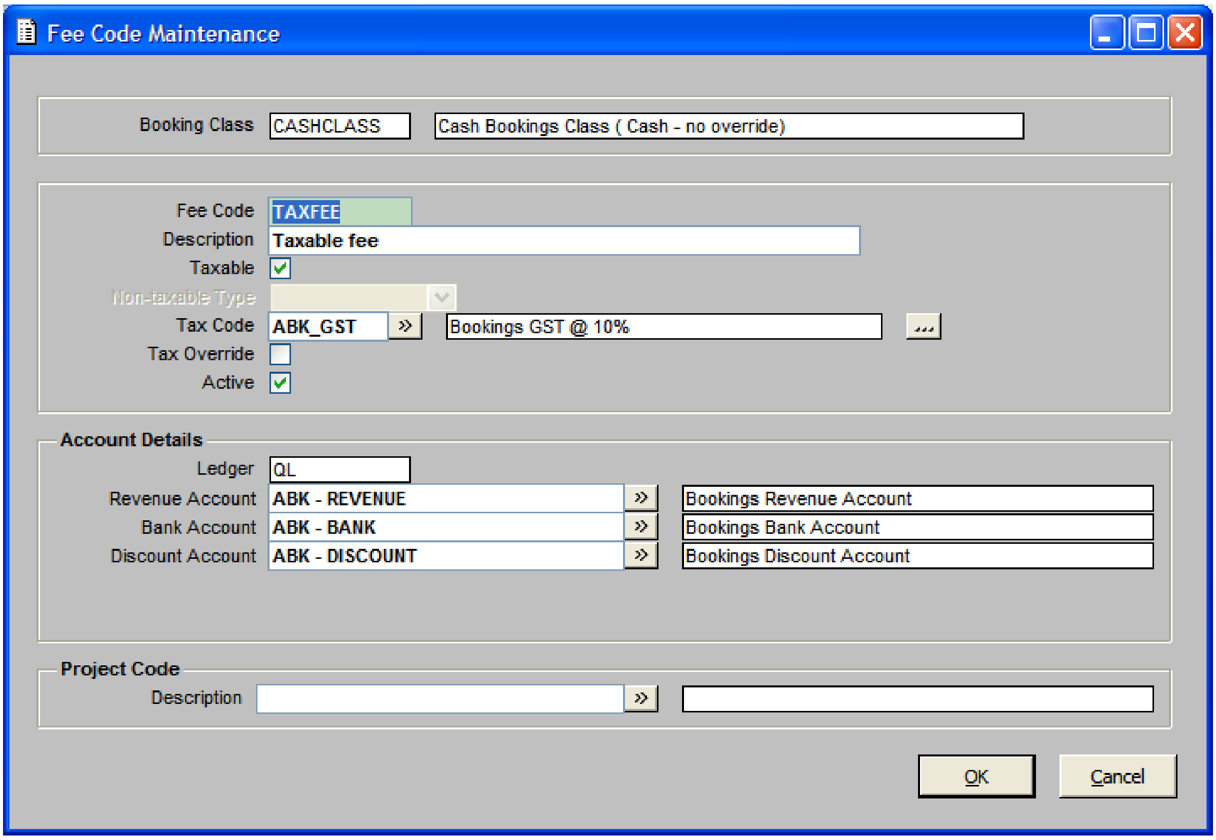
- Councils must ensure that any Fees added to a booking before 01/10/10 are transferred to Debtors (where applicable) and invoiced before 01/10/10, otherwise the fees must be removed from the Booking. Fees added before 01/10/10 will initiate a time of supply prior to 01/10/10. This results in a tax rate of 12.5% being applied to the booking.

  Fees added prior to 01/10/10 but invoiced on or after 01/10/10 will NOT be cater for and will result in a tax rate of 12.5% being applied instead of the 15% required by the time of supply.

<u>Councils must ensure the following business practices are followed in regards to Bookings.</u>

- Adjustments to Bookings with an Accounting Method of ‘Pathway Debtors’ must be made from the Booking then transferred to Debtors. Adjustments must not be made directly to the debtor.

See further details under Tax Override



Fee Code Maintenance Form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Fee Code/Description

These fields allow a 6 character Fee Code to be entered along with a description of up to 50 characters, e.g. FEE1, Fee 1 (GST Free). These fields a mandatory.

Taxable Flag
This field is an On/Off flag indicating whether the Fee Code contains Tax. If a Fee code is defined as taxable, then all amounts are assumed to be tax inclusive.

Non-taxable Type

If the Taxable field has not been flagged on, therefore making it Non Taxable, then a Non-taxable Type needs to be defined. There are 3 options available in the dropdown list. These are as follows:

- GST Free
- GST Exempt
- Division 81
- Input Tax
- Out of Scope
- Export Sales
- Undefined.

It is expected that Australian sites will use GST Free and Division 81 only. Financial systems can use these values, as the applicable codes, below, are output in the Pathway Financial Transaction File in place of the previous 'N' value.

- N - GST Free
- X - GST Exempt
- 8 - Division 8
- I – Input Tax
- O – Out of Scope
- E – Export Sales
- Z - Undefined

Tax Code
This field allows the selection of the applicable Tax Code for the Fee Code. The Tax Code may be selected from the Tax Codes defined in Pathway. A Tax Code will be mandatory if the Taxable flag is set ON. Selection of the Detail button displays the Tax Code Enquiry form where further details relating to the Tax Code may be viewed.

Tax Override Flag
A new parameter called *Tax Override* has been added to the Booking Fee Code Maintenance form. Fees with the *Tax Override* flag turned on will have tax calculated based on the date the fee was added to the booking instead of the date the first fee was added to the booking.

Tax Calculation
A booking line with fees added before 01/10/10 will be taxed as follows:

- New fees added on or after 01/10/10 that have the Tax Override flag turned OFF will be taxed at 12.5%.
- New fees added on or after 01/10/10 that have the Tax Override flag turned ON will be taxed at 15%.
- Adjustments made to fees added before 01/10/10 will be taxed at 12.5%.
- Adjustments made to fees added on or after 01/10/10 will be taxed at the tax rate that was applicable to the original fee. If the fee has the Tax Override flag turned ON then this would be 15%, if the fee has the Tax Override flag turned OFF then this would be 12.5 %

Booking lines that do NOT have fees added before 01/10/10 will be taxed as follows

- New fees that are added on or after 01/10/10 will be taxed at 15% regardless of whether the Tax Override flag turned on or off.
- All adjustments will be taxed at 15%.

Receipt Reversals will calculate tax using the tax rate applicable to the fee/debt that the payment was allocated to.

Receipt Transfers will calculate tax using the tax rate applicable to the fee/debt being transferred from/to.

Example:

Booking Date	Fee	Transaction Date	Tax Override	Amount	Tax Rate %
01-Oct-2010	Fee 1	01-Sep-2010	OFF	100	12.50
	Fee 2	01-Oct-2010	OFF	50	12.50
	Fee 3	01-Oct-2010	ON	50	15.00
01-Nov-2010	Fee 1	01-Sep-2010	OFF	100	12.50
	Fee 2	01-Oct-2010	OFF	50	12.50
	Fee 3	01-Oct-2010	ON	50	15.00
01-Dec-2010	Fee 1	01-Nov-2010	OFF	100	15.00
	Fee 2	01-Nov-2010	OFF	50	15.00
	Fee 3	01-Nov-2010	ON	50	15.00

Booking for October and November taken before 01-Oct-2010 and Fee 1 added attracting a tax rate of 12.5%.

Fee 2 and 3 add to each booking after 01-Oct-2010. Fee 2 has the Tax Override off so attracts a tax rate of 12.5%. Fee 3 has the Tax Override on so attracts a tax rate of 15%.

Additional booking date for December added after 01-Oct-2010. Time of supply is taken from the transaction date of the first fee on the booking line i.e. 01-Nov-2010. So fees with the Tax Override off and on are taxed at 15%.

The above occurs whether the fee is a booking or activity fee.

Active Flag

This field is an On/Off type field indicating whether the Fee Code is active and available for use. An Active Fee Code is one that can be selected to be used against a Facility or Activity Type. If a Fee Code is Inactive then the Fee Code will not be available for selection against a Facility or Activity Type. If an inactive Fee Code has already been selected against a Facility or Activity Type, it can still be applied to any new Bookings that are created. This approach is standard Pathway functionality, i.e. where a parameter (e.g. Fee Code) has been selected against a record, it will continue to be used. On any new records, the inactive parameter will not be available for selection.

Account Details – Ledger

The Ledger details will default into this field once the user has selected an account.

Note: The Fee Code accounts and the Charge Override account must be in the default Debtors Ledger.

Account Details – Account/Description

Account details may be keyed in or, alternatively, selected from the Account Pop Up. These accounts will be used as the various Debtor Accounts (Debt Control, Revenue, Bank, Receipt Control, and Discount) in all financial transactions that are processed through Bookings.

Note: The Fee Code accounts and the Charge Override account must be in the default Debtors Ledger.

The first four accounts are the mandatory accounts for the Fee Code. These accounts are passed through to Debtors and are stored on each corresponding Debt Type. The fifth account, **Discount**, is an optional account that will only be recorded within the Bookings Management module. If a Discount Account is specified then additional processing will occur when raising Invoices and Credits. The Nett discounted amount on a Charge Line will be posted to the nominated Revenue Account and the Discount Amount will be posted to the nominated Discount Account. See further details on Discount.

Project Code – Description

Project Code processing has been added to Pathway Bookings in Release 2.21. The Project Code fields allow the assignment of a Project Code against the Fee Code. If a Project Offset Account has been set up for the Ledger, the Offset Account entered against the Ledger will be retrieved and updated into the Revenue Account field. The Revenue Account field will then be dimmed, disallowing the Revenue Account from being changed.

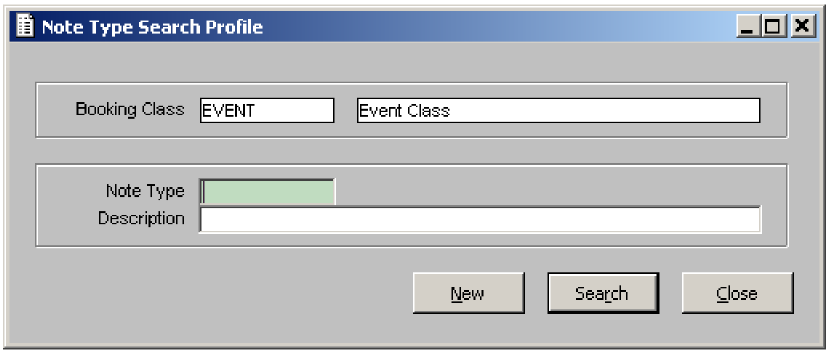
If a Booking is raised to either Pathway Debtors or as a Cash Invoice, and there is no Override Project Code at the Charge Level (i.e. on the Facility, Sub-Facility, Activity or Resource), the Project Code (displayed on this form) will be assigned to the Revenue Transaction.

Note Types

Note Types may be created to be used as a classification against Notes that are added against a Booking Request. The definition of Note Types allows users to provide templates for certain types of notes to provide a pro forma for staff to complete the note. It also allows staff to record details that are specifically required to be extracted onto documents to the customer. For example details relating to Public Notifications etc.

Note Type Search Profile Form

The Search Profile form allows the user to add a new Note Type or search for an existing one.



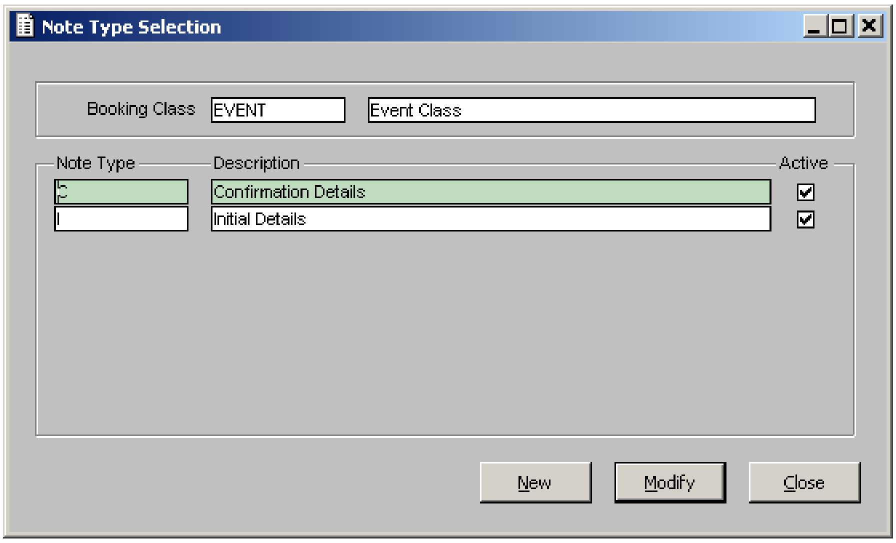
Note Type Search Profile Form

Booking Class
These fields display details of the Booking Class.

Note Type/Description
Enter a Note Type Code and/or Description on which to base your search and then select the Search button.

Note Type Selection Form

This form displays when more than one Note Type exists. The user is able to select a Note Type from the list to maintain, or create a new one.



Note Type Selection Form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Note Type/Description

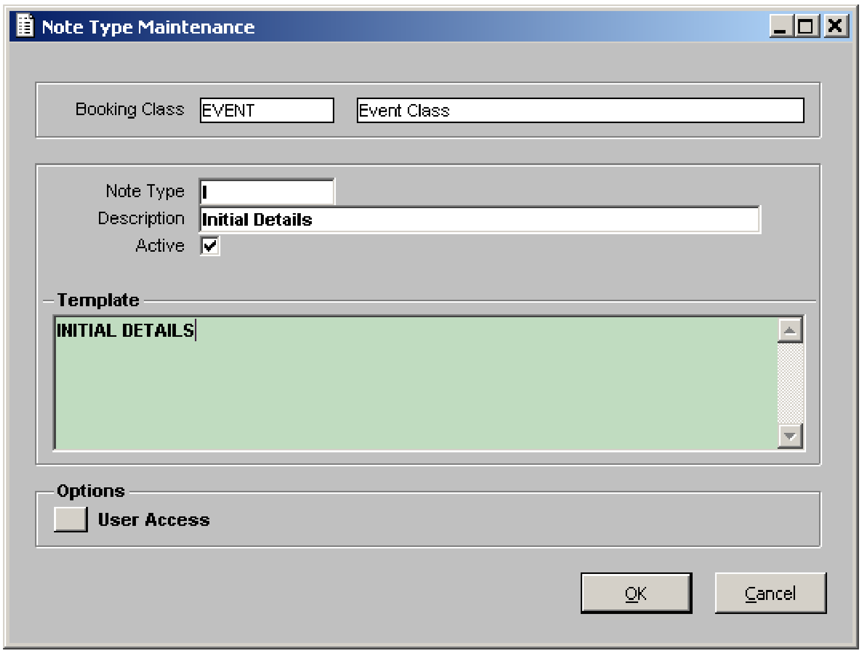
These fields display the Note Type Code and the Description, e.g. C, Confirmation Details.. These fields are not maintainable.

Active Flag

The Active indicator shows whether the Note Type is active and available for use. It is not maintainable from this form.

Note Type Maintenance Form

This form allows the user to set up and maintain Note Types to be used as a template for creating Notes that are added against a Booking Request.



Note Type Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Note Type/Description

These fields allow a Note Type Code and Description to be entered. The Note type Code field is a 10 character mandatory field. The Description allows 50 characters to be entered to provide a description for the Note Type, e.g. Public Notification.

Active Indicator

The Active flag is an On/Off indicator which nominates whether or not a Note Type is available for use.

Template

The Template field is a free-format field of unlimited size which allows the user to set up a template that will be applied when a new Note is created. This is an optional field.

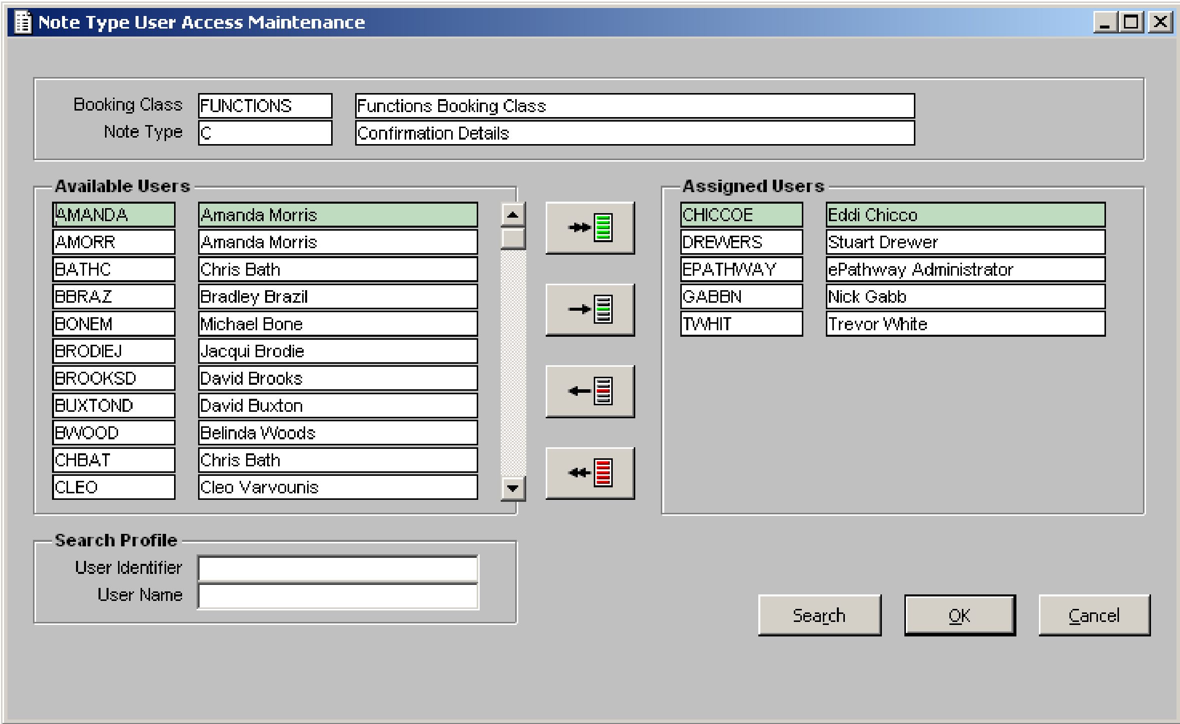
Options – User Access

Selection of the User Access button displays the Note Type User Access Maintenance form where access to Note Types may be given to specific users. A Note Type is either available to all users or restricted to a specific set of users. Where a Note Type is restricted to a specific set of users, then when a Request is being viewed, the user must be assigned to the Note Type to be able to view the details. If the user not assigned to the Note Type, then they will be able to see that a Note Entry has been made on the specified Date and Time, as well as the Note Type. However, the Note details will be restricted from being viewed.

Note Type User Access Maintenance Form

The Note Type User Access Maintenance form allows Available Users to be Assigned access to a Note Type. The Select and Remove Buttons may be used for this purpose.

Note: If no user has been assigned to a Note Type, it means everyone can access the Notes with that Note Type. If there are users assigned to a Note Type, then only the users assigned can access the Notes with this Note Type.



Note Type User Access Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Note Type

These fields display details of the selected Note Type, e.g. C, Confirmation Details.

Available Users

These fields list the Users who are available to be given authority to access Note Types. Focus on a User and select the ‘Select’ button to move the User to the Assigned area.

Assigned Users

These fields list the Users who have been given authority to access Note Types. To unassign a User, place focus on the User and select the ‘Remove’ button to move the User back to the Available area.

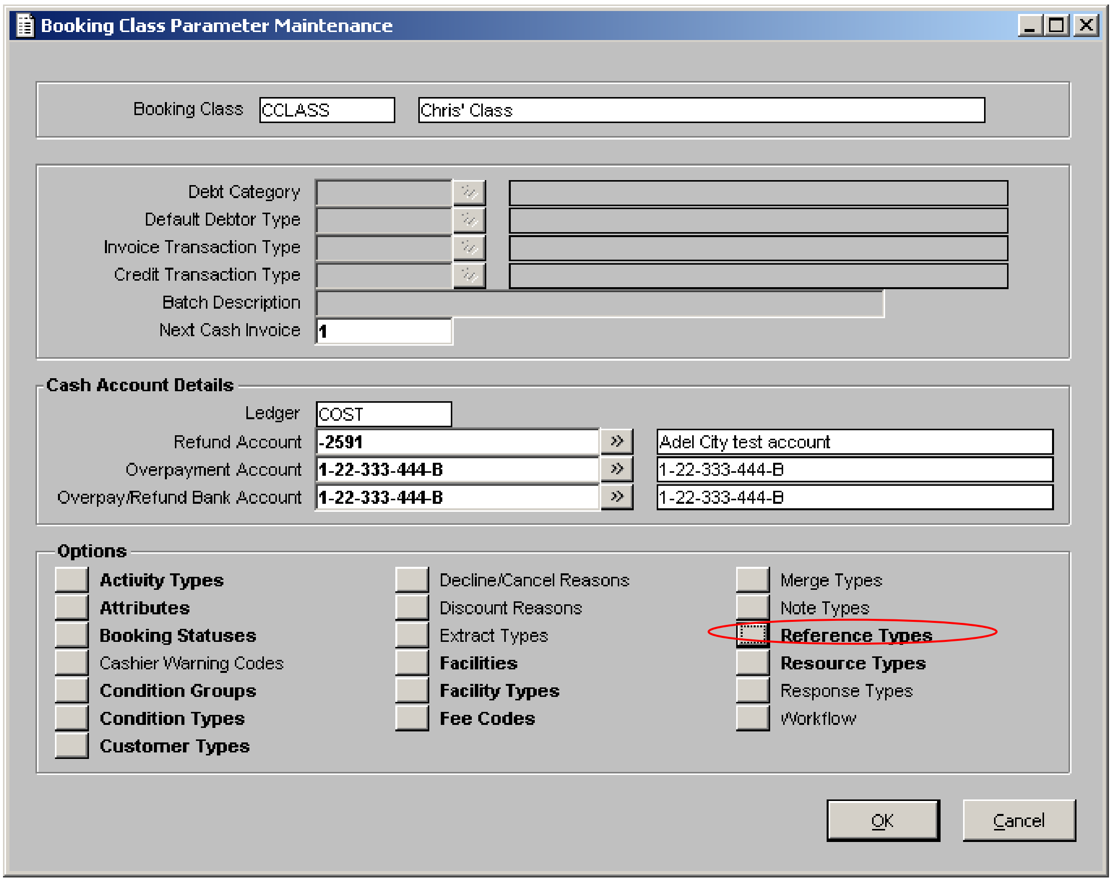
Search Profile – User Identifier/User Name

Enter a User Identifier and/or User Name on which to base your search and then select the Search button.

Reference Types

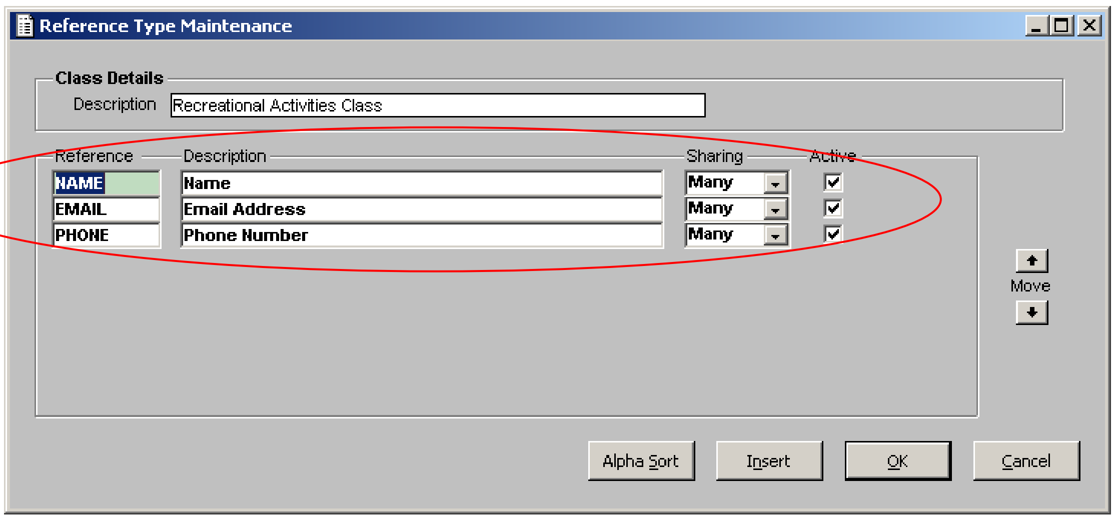
Reference Classes can be linked to Booking Classes.

Booking Class Parameter Maintenance includes an Option button, “Reference Types”, allowing council to define a set of Reference Types for a Booking Class.



Booking Class Parameter Maintenance form showing the ‘Reference Types’ option button

At least three References need to be created for a class, representing Name, Email, and Contact Number. These three References are required for ePathway Bookings to allow public ePathway users to be linked to a Booking Request header.

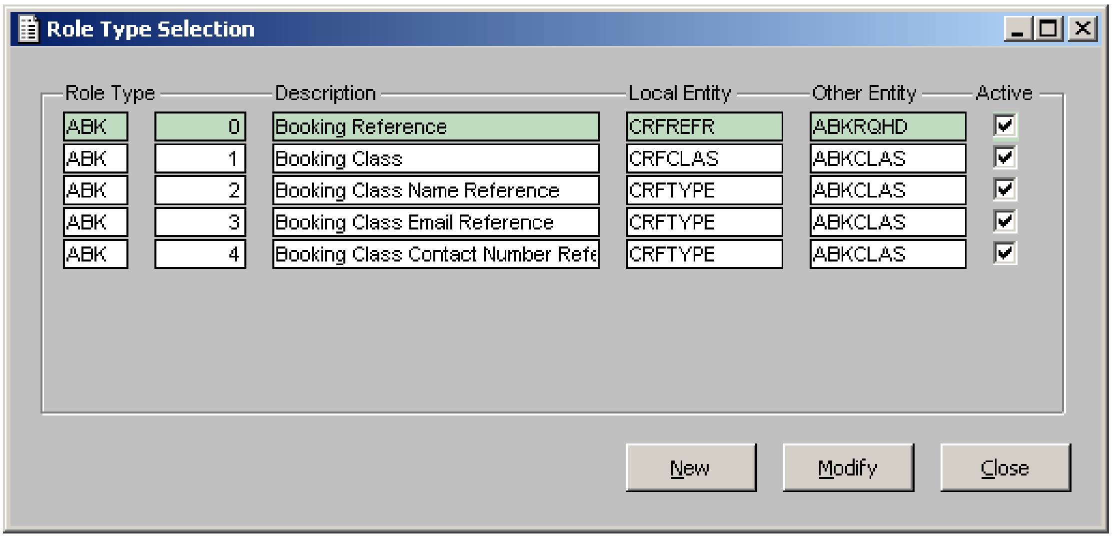


Reference Type Maintenance form showing the three required References for eBookings

Each of these references must have a Sharing relationship of 'Many' allowing a public ePathway user making a booking, to use the same Name, Email Address, and Contact Number for multiple Booking Requests.

Role Types

Five new Role Types have been defined within the References module allowing for Name, Email Address, and Contact Number references to be linked to a Booking Request header, when a public ePathway user makes a Booking.


Role Type Selection

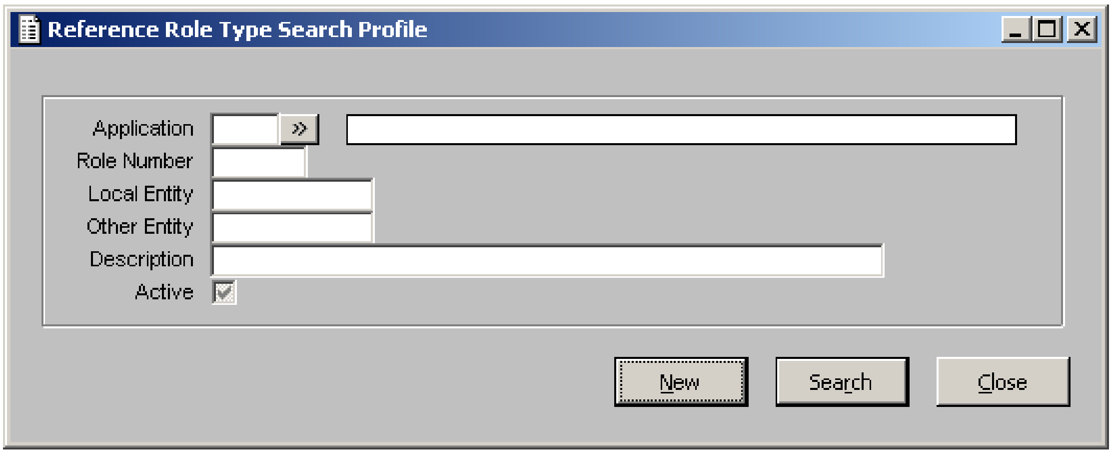
Role Type		Description	Local Entity	Other Entity	Active
ABK	0	Booking Reference	CRFREFR	ABKRQHD	☑
ABK	1	Booking Class	CRFCLAS	ABKCLAS	☑
ABK	2	Booking Class Name Reference	CRFTYPE	ABKCLAS	☑
ABK	3	Booking Class Email Reference	CRFTYPE	ABKCLAS	☑
ABK	4	Booking Class Contact Number Refe	CRFTYPE	ABKCLAS	☑

New Modify Close

Role Type Selection form showing the five new Role Types

A Booking Reference is created allowing it to be linked to a Booking Request header and a Booking Class reference is created, allowing for individual Booking Classes to have Reference Types defined for it, hence, each class should have a Name, Email, and Contact Number Reference Type defined for it.

These Role Types are created by navigating to the Reference Role Type Search Profile form (System Administration >> References Parameters >> Reference Role Type Filter) and then clicking the 'New' button.


Reference Role Type Search Profile

Application >>
Role Number
Local Entity
Other Entity
Description
Active ☑

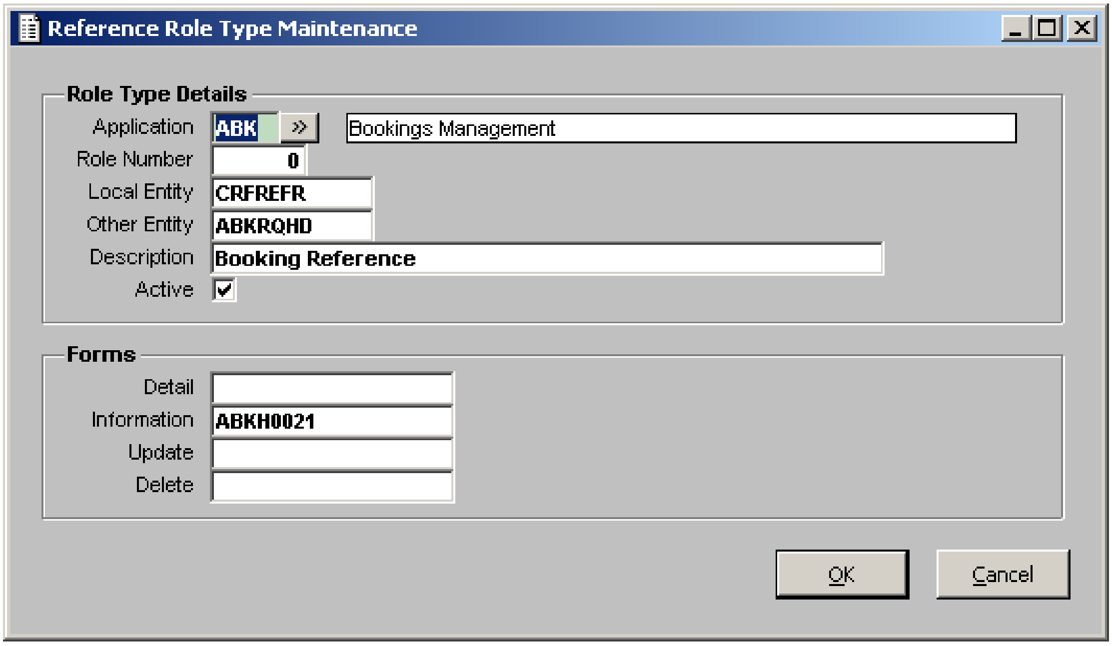
New Search Close

Reference Role Type Search Profile form

This process should be repeated for each ABK role type that is to be created, which is outlined below.

Booking Reference

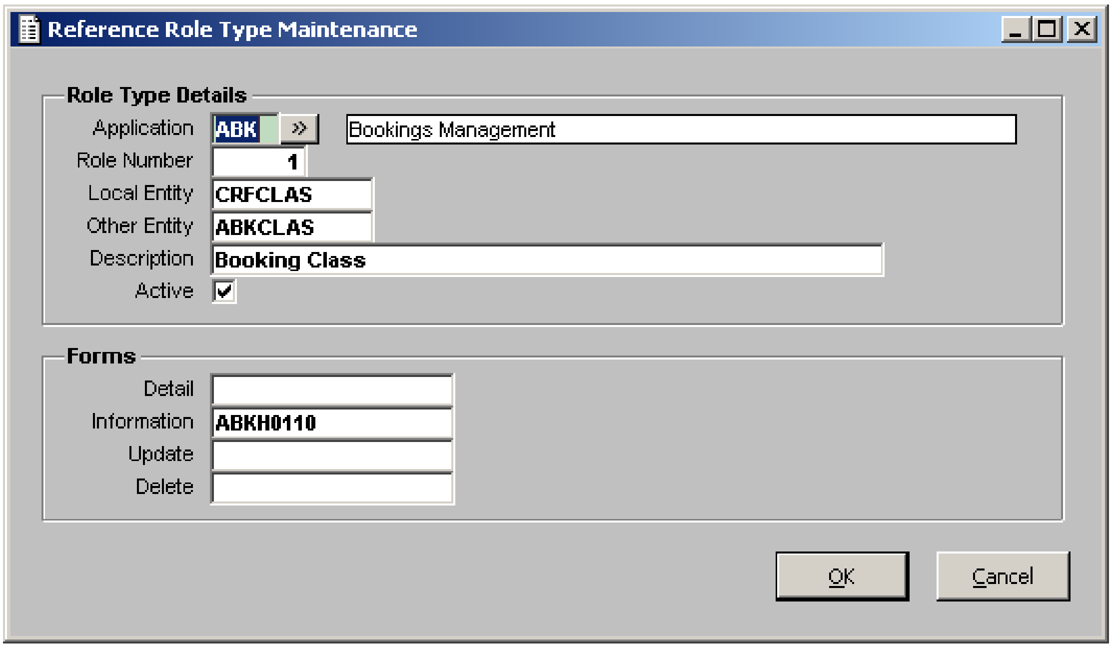
The Booking Reference Role Type has the following parameters specified, shown in the figure below:



Reference Role Type Maintenance form showing Booking Reference role type parameters

Booking Class

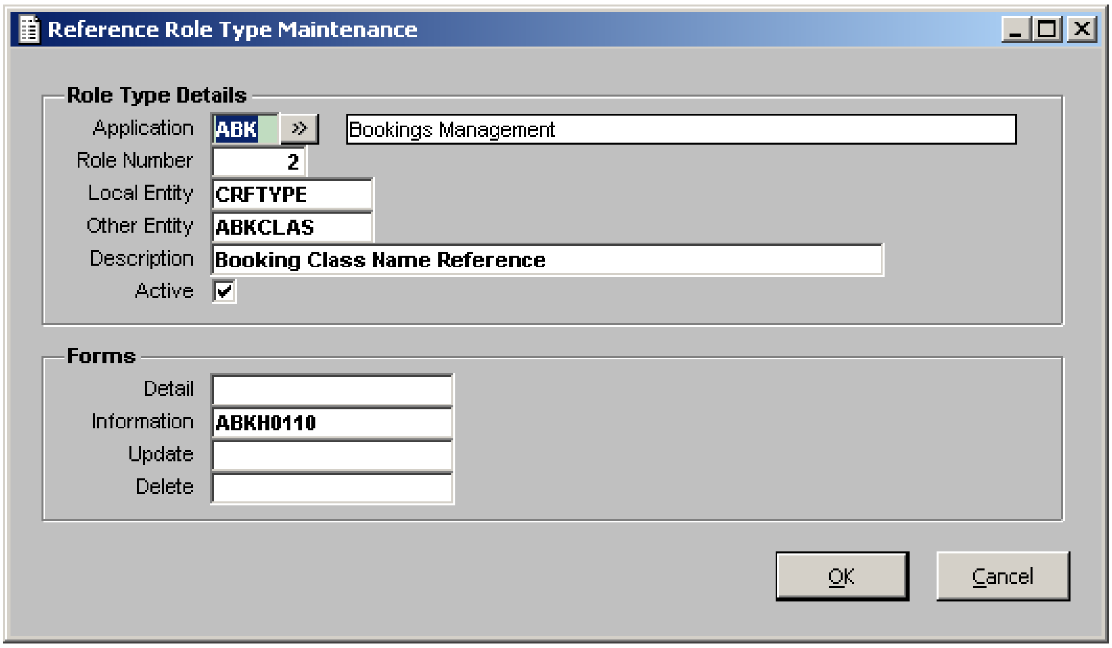
The Booking Class Role Type has the following parameters specified, shown in the figure below:



Reference Role Type Maintenance form showing Booking Class role type parameters

Booking Class Name Reference

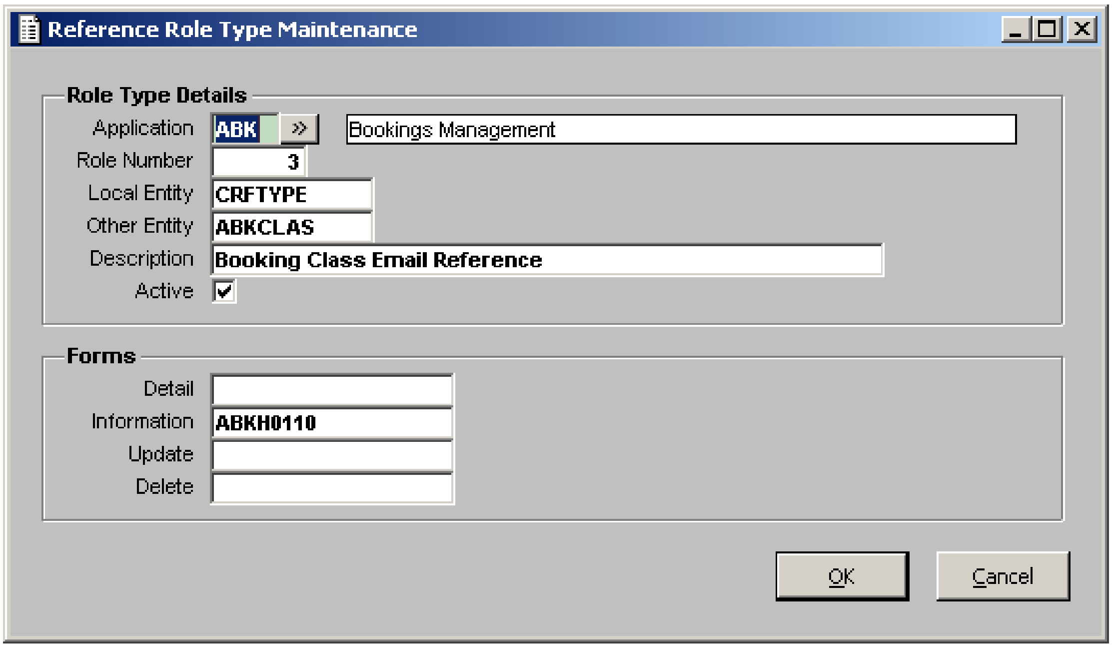
The Booking Class Name Reference Role Type has the following parameters specified, shown in the figure below:



Reference Role Type Maintenance form showing Booking Class Name Reference role type parameters

Booking Class Email Reference

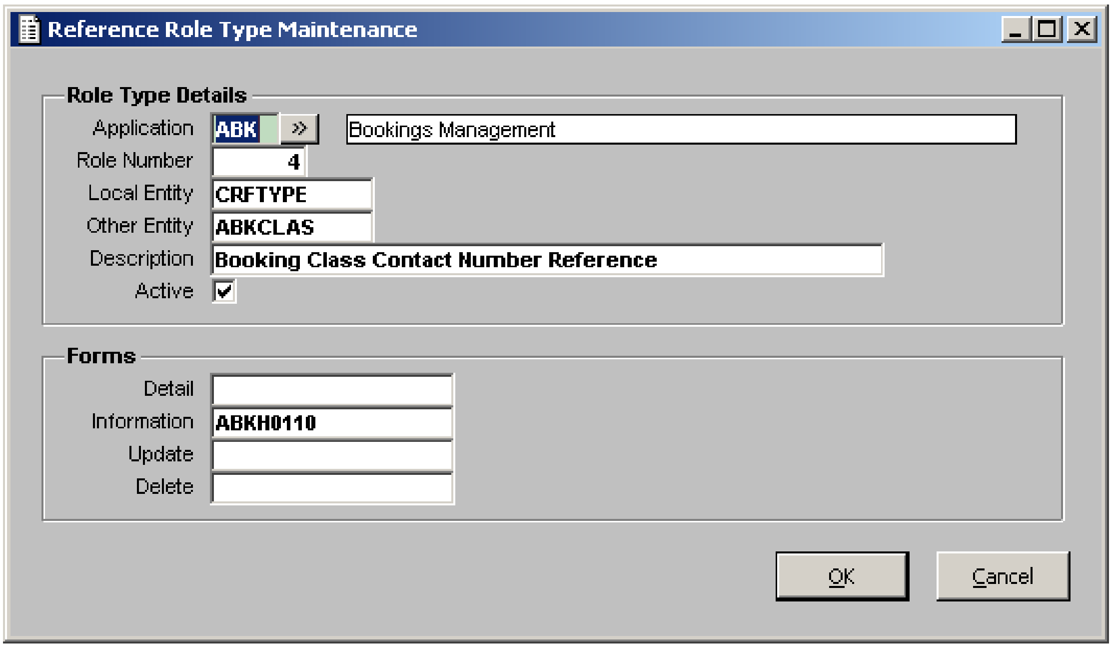
The Booking Class Email Reference Role Type has the following parameters specified, shown in the figure below:



Reference Role Type Maintenance form showing Booking Class Email Reference role type parameters

Booking Class Contact Number Reference

The Booking Class Contact Number Reference Role Type has the following parameters specified, shown in the figure below:



Reference Role Type Maintenance form showing Booking Class Contact Number Reference role type parameters

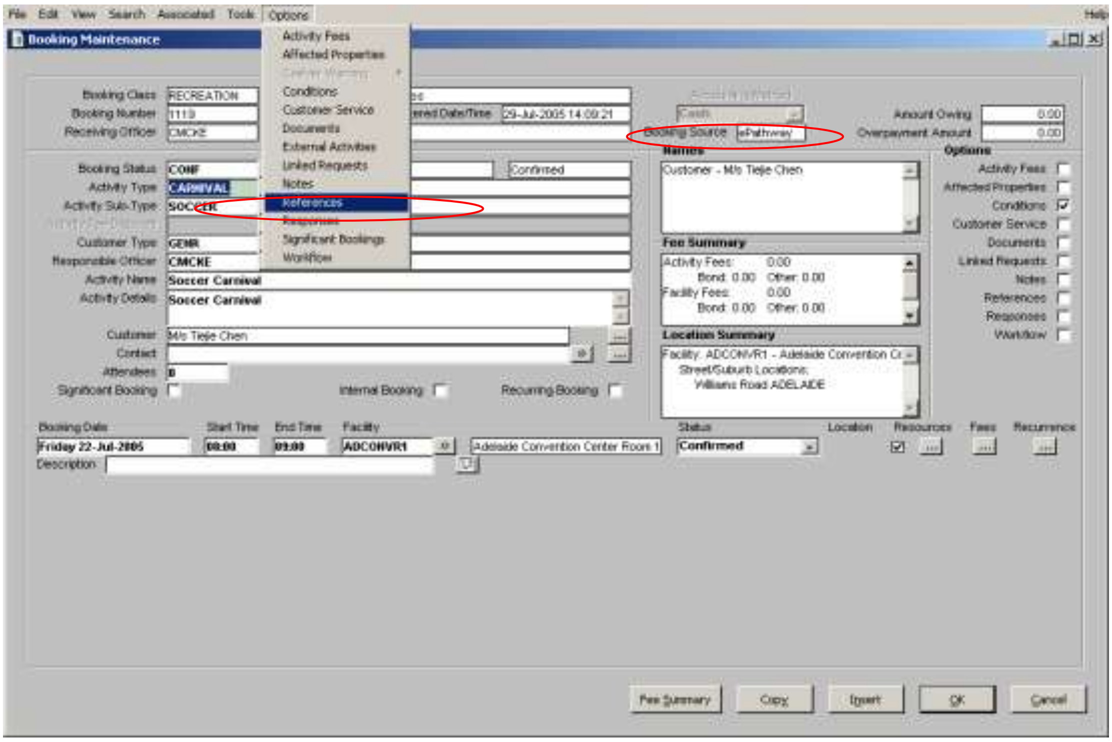
Booking Maintenance

Booking Source

A new field has been added to the Booking Maintenance form, ‘Booking Source’, which contains either ‘ePathway’ or ‘Pathway’, indicating to the user whether this booking was made internally through Pathway or online via ePathway.

References

The Booking Maintenance form includes the Booking References option. Users are able to manually update references in Pathway, where the References are automatically created in ePathway Bookings, linking public users (by name, email and phone number) to a Booking Request.



Booking Maintenance form showing the new References option and the Booking Source field

Booking Status

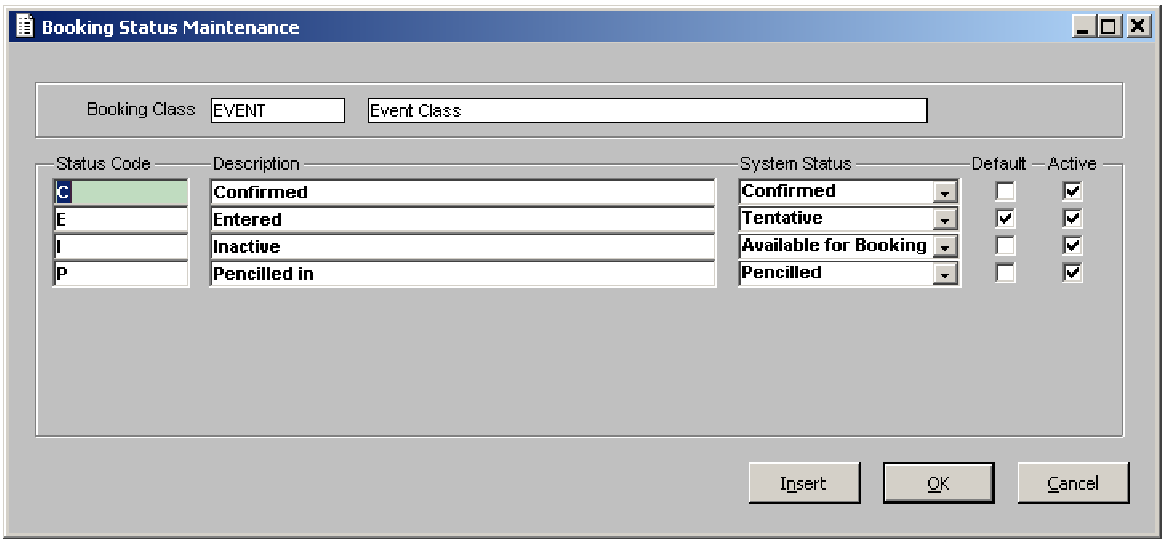
The ability to define a list of Statuses that can be added against a Booking Request or a Booking Line is available.

When adding a status against the Request, if the Request Status has a System Status of “Available for Booking”, and the booking has been invoiced, then a warning message will be displayed to the user. Once a Request has been set to a Status that has “Available for Booking” as the System Status, the user will not be able to change the Status again. If the Request needs to be made again, then the user will be required to enter a new request.

If a Booking Line has been cancelled or declined, then a new Booking Line will need to be entered to recreate the booking.

Booking Status Maintenance Form

This form allows the user to establish Status Codes based on the various System Statuses available. These may be applied to a Booking Request or a Booking Line.


Booking Status Maintenance

Booking Class EVENT Event Class

Status Code	Description	System Status	Default	Active
C	Confirmed	Confirmed		✓
E	Entered	Tentative	✓	✓
I	Inactive	Available for Booking		✓
P	Pencilled in	Pencilled		✓

Insert OK Cancel

Booking Status Maintenance form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Status Code/Description

These fields allow a Status Code and Description to be entered to describe a Booking Status. An example could be: C – Confirmed etc

System Status

This field allows a selection to be made from a dropdown. The available options are:

- **Tentative** – This indicates a potential booking. A customer has recorded the time but not provided confirmation.

- **Awaiting Response** – The Booking is in progress and details have been sent to the customer and council is awaiting return of details. This booking is assumed to be occurring.
- **Confirmed** – Booking is confirmed and locked in.
- **Available for Booking** – This means that the Booking time is available for another booking.

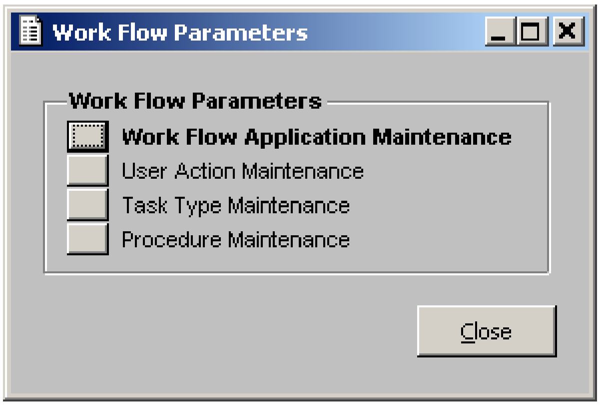
Default Flag
The flag is an On/Off indicator which allows the user to establish a default Booking Status. Only one default Status is allowed.

Active Indicator
This flag is an On/Off indicator which determines whether the Booking Status is active and available for use.

Workflow

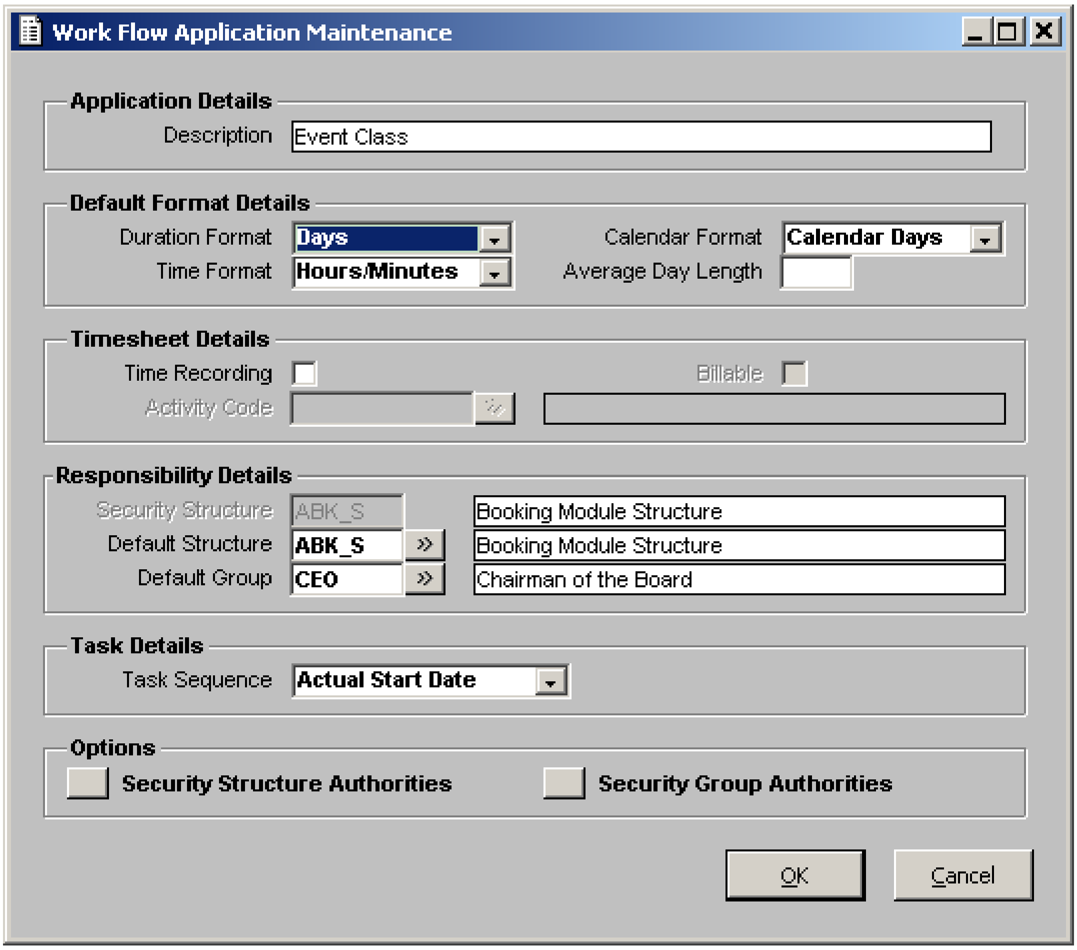
An interface has been provided to the Pathway Workflow module which allows users to create Actions, Task Types and Procedures. The main Workflow Parameter Access form (shown below) provides access to this module.

For further details on the operation of the Workflow module please refer to the Workflow User guide or Help file accessed via the Help Menu>>Contents>>Workflow.



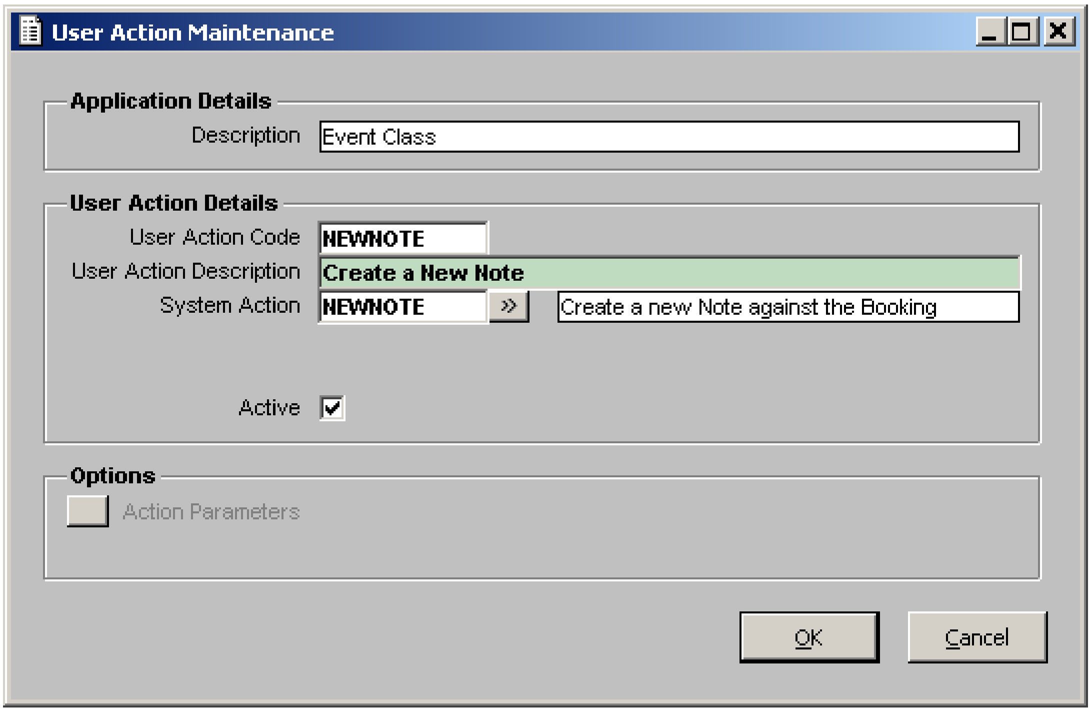
Workflow Parameters form

The System Parameter form (below) allows entry of the Workflow System Parameters for Bookings Management.



Workflow Application Maintenance form

The User Action Maintenance form (below) allows Actions to be created which may or may not use System Actions. The Actions are then added to Tasks so that they can be performed when the Task is executed.

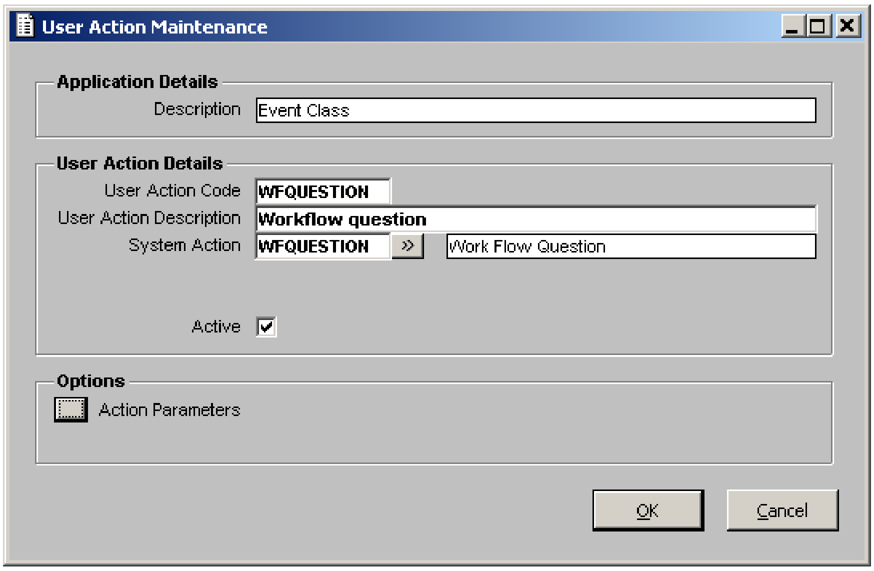


User Action Maintenance form

The following System Actions have been made available to the Bookings Management module. Note that the Workflow is driven by the Activity Type of the Booking Request.

System action	Description
Createlett	**This action allows the user to select the persons to receive a letter, and then allows the selection and generation of the required letter. It allows selection of recipients from the role types currently linked to the request (e.g. Customer, affected party etc).**
Newnote	**This action allows the user to create a new note against the booking, where note information is required to be recorded against the request.**
Maintnote	**This action presents all existing notes against a booking and allows the user to select a note and perform any maintenance required.**
Uptstatus	**This action allows the user to optionally nominate the status to which the request should be set. Note: the new status will not be evident until the booking request is refreshed.**
Wfquestion	**This action allows questions and a selection of answers to be defined which will determine the particular workflow action that will be executed.**

A new Workflow System Action has been created called “WFQuestion”. If this System Action is used against a User Defined Action, then “Action Parameters” are available to define the Question and available Answers. The user is presented with a form that will allow them to define the Question (250 characters maximum) that may be asked when the Action is executed. The user is then able to define one or more Answers. An Answer must be added for the Question.



User Action Maintenance form showing new User Action “WFQUESTION”

Each Answer allows a text response to be added (250 characters maximum) and allows a Procedure, Task Type or Action to be associated. There is also an option for associating nothing, i.e. ‘None’. In this way users are able to define the Question and required Answers, and each Answer will then either load the Procedure, Task Type, Action or ‘None’ against the Booking.

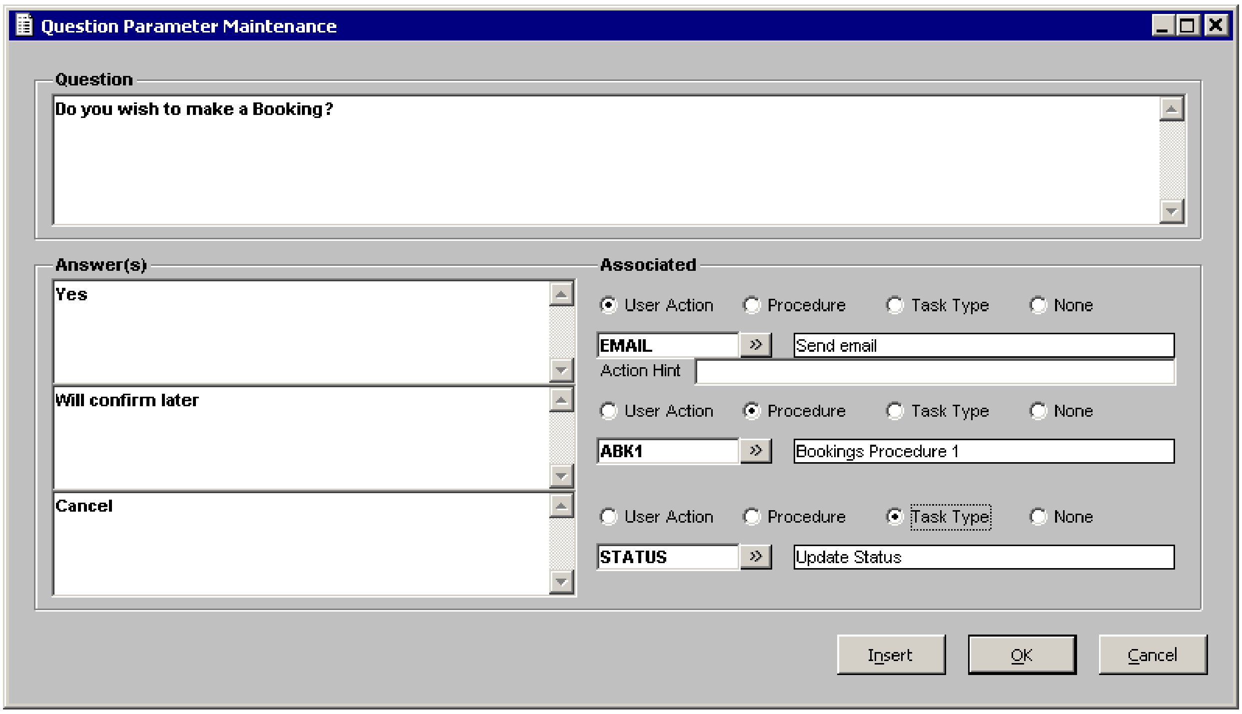
If a User Action is associated to an Answer, then the original User Action will be completed and the attached User Action will be added and executed immediately against the current Task. The user is also able to enter an Action Hint to explain what action is to take place.

If a Task Type is associated to an Answer then the Task Type is added and the User Action will be completed. The Task Type is added as a following Task to the Task being executed.

If a Procedure is associated to an Answer then the Task Types associated to the Procedure will be inserted and the User Action will be completed. The Task Types will be inserted as following Tasks to the Task being executed.

If ‘None’ is selected, then no User Action, Procedure or Task will be inserted upon answering a Question. When executing a User Action where such an Answer is selected, the User Action will be flagged as ‘completed’ and no User Action, Procedure or Task will be inserted, and the next User Action (if applicable) will be executed.

If no answer at all is selected and the Cancel button is clicked, the User Action will still be pending.



Question Parameter Maintenance form

The Task Type Maintenance form (below) contains details of the Task which will be executed. A Task can have many associated Actions, e.g. The Task “Notification of Affected Parties” would involve a number of Actions, such as ‘Send a Letter’, ‘Add Note to Request’ to record action taken etc.

In Task Type Maintenance the user is able to nominate that a Task needs to occur “X” days before or after the actual Booking Date. The estimate dates against the Task cannot be changed or altered. This is useful for tasks that indicate that a Bond is required to be refunded. In these cases, this task must occur “X” days after the booking and cannot occur before.

In addition there are certain tasks that need to occur before the actual Booking Date, and they must occur “X” days before the booking date.

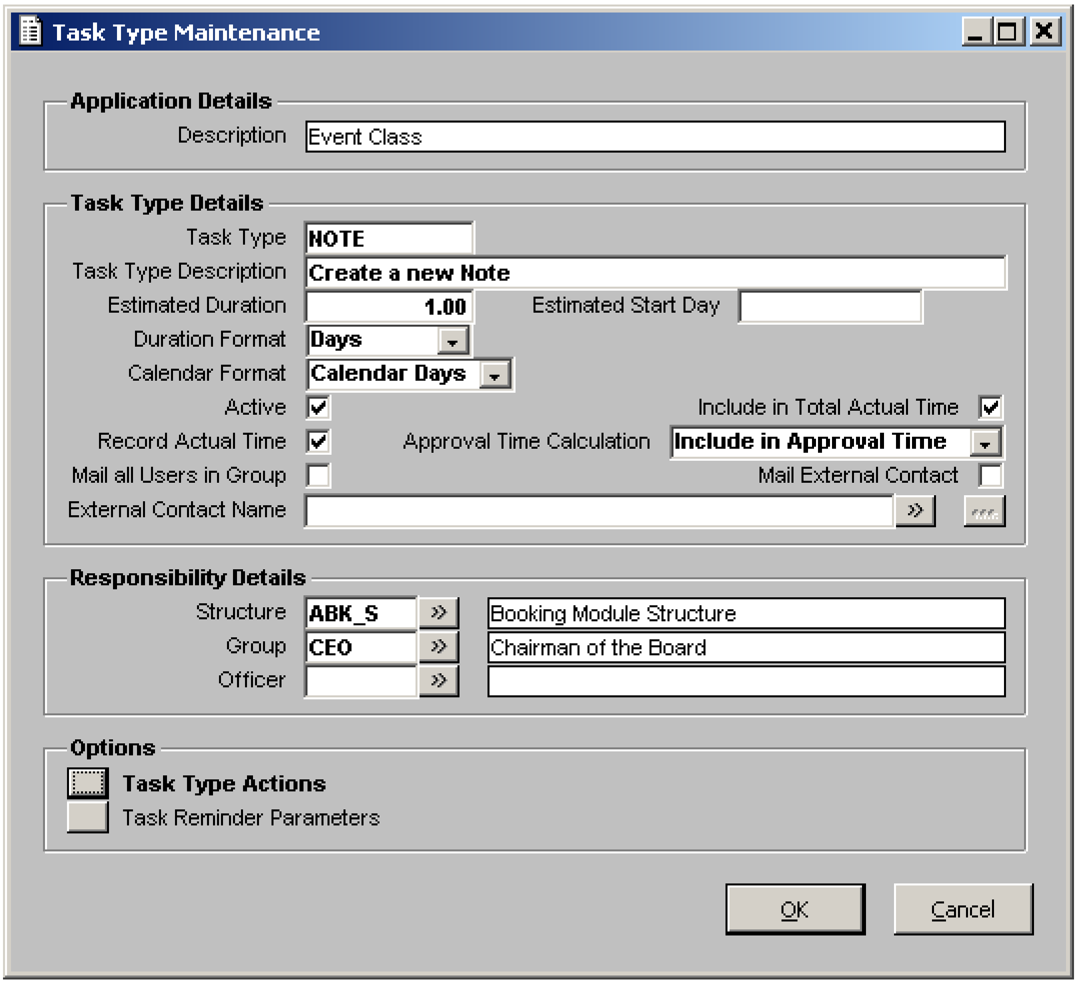
The “Booking Date” for the Request is used to determine the workflow estimate dates.

The Booking Date is determined in the following way:

Where multiple Booking Lines exist against the Booking Request, then the first Booking Line date will be used to calculate the Estimate Dates for Tasks that need to occur X days before the start of a Request. The last Booking Line date will be used to calculate the Estimate Dates for Tasks that need to occur X days after the Booking has occurred.

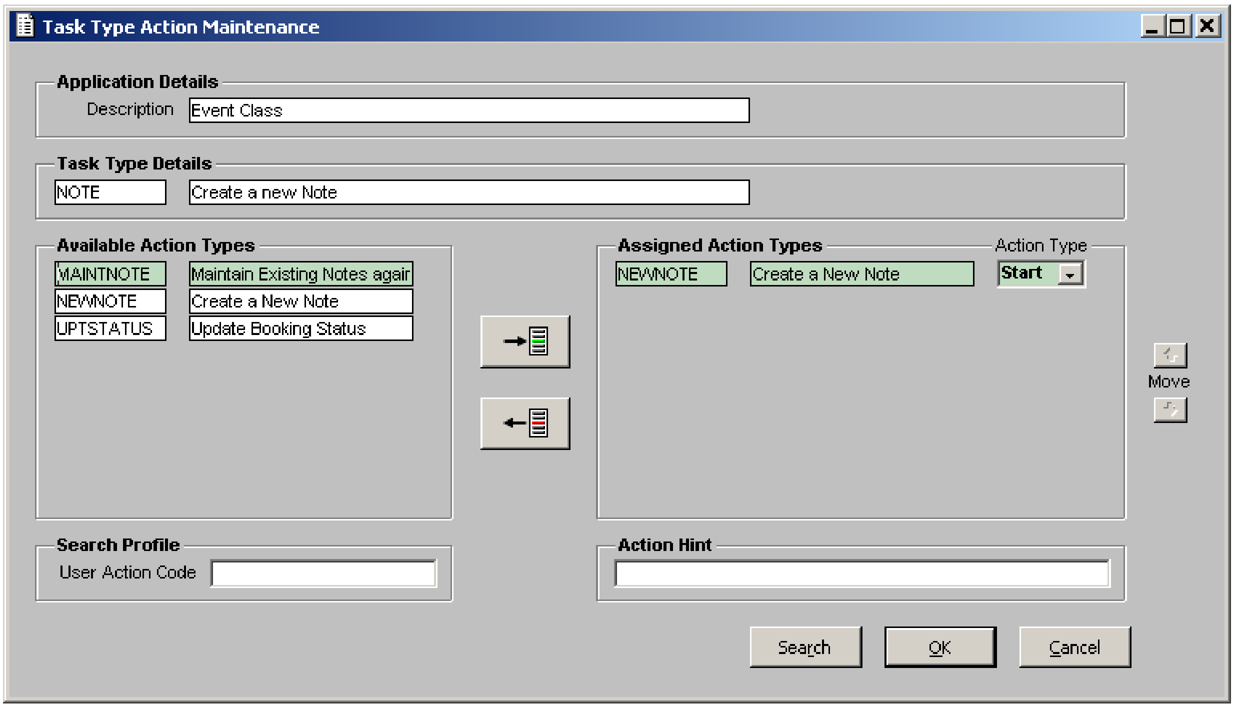
If a single Booking Line exists against a Request, then the date against the Booking Line will be used as the Booking Date for those tasks that need to occur before and after the Booking Date.

If a Booking Date is changed, then the Estimated Dates will be updated against any uncompleted Tasks. Where Tasks have already been started, the Estimated Completion Date will be updated only. The Estimated Start Date will not be changed as the Actual Start Date has been recorded.



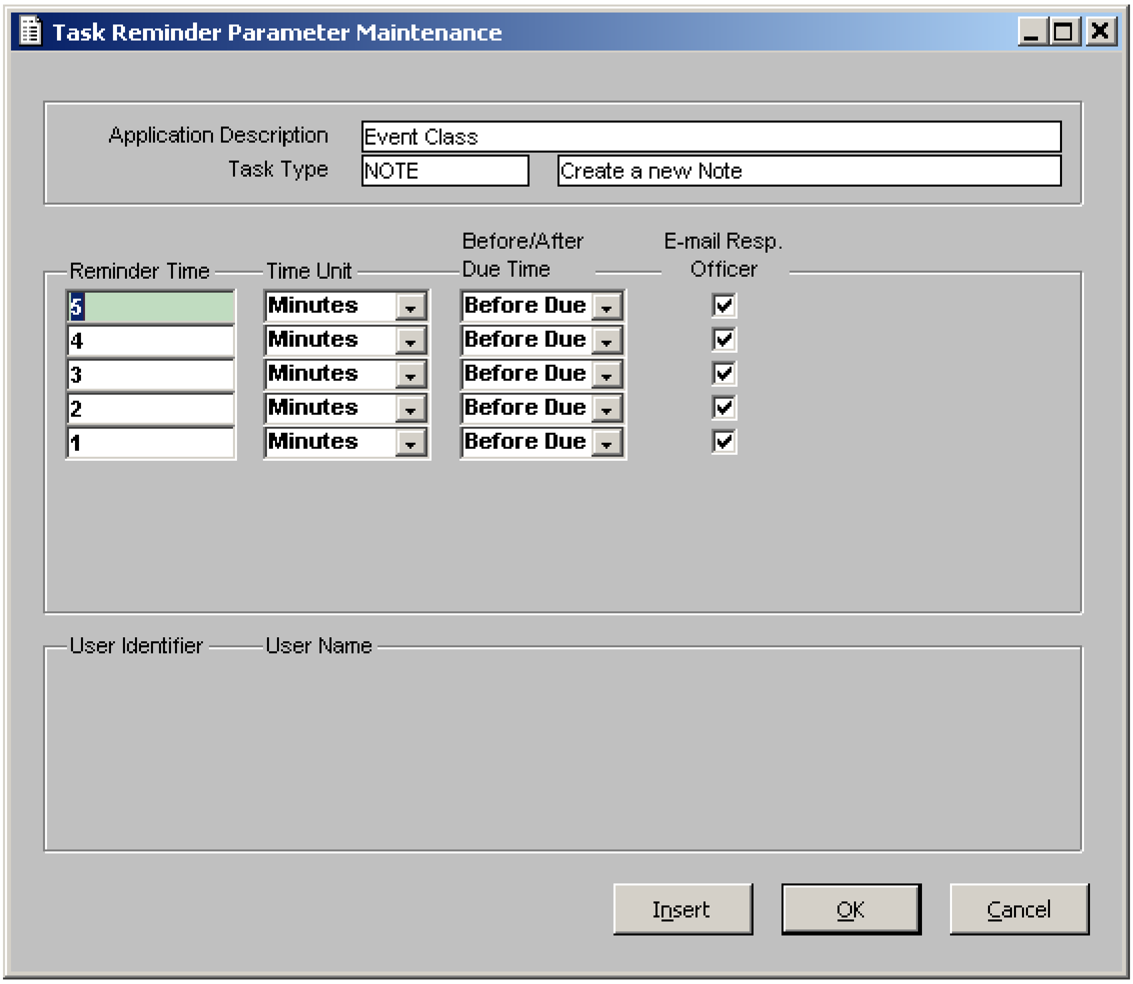
Task Type Maintenance form

The Task Type Action Maintenance form (below) allows the user to set up Actions to be associated with the Task in the order in which they are to be performed.



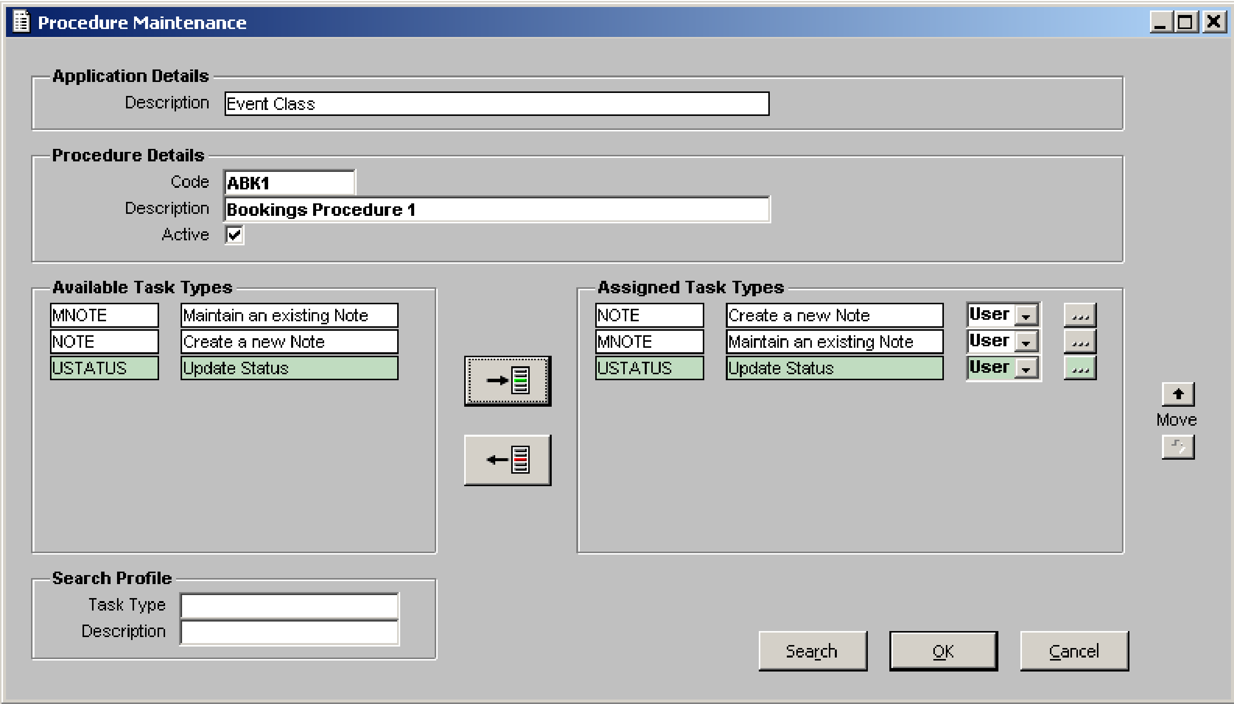
Task Type Action Maintenance form

The Task Reminder Parameter Maintenance form (below) allows Reminder processing to be applied to Tasks. If Reminder Processing is performed then the Responsible Officer of the Task can be reminded before or after the Task is due that action is required. The Responsible Officer of the Booking Request is also able to be nominated in the Reminder Process.



Task Reminder Parameter Maintenance form

A Procedure is the process that groups together a number of Task Types that need to be performed. The Task Types included in a Procedure can be linked to each other to indicate that Task A must occur prior to Task B, for example. The user is also able to nominate whether the Task is to be started by the system or by the user.



Procedure Maintenance form

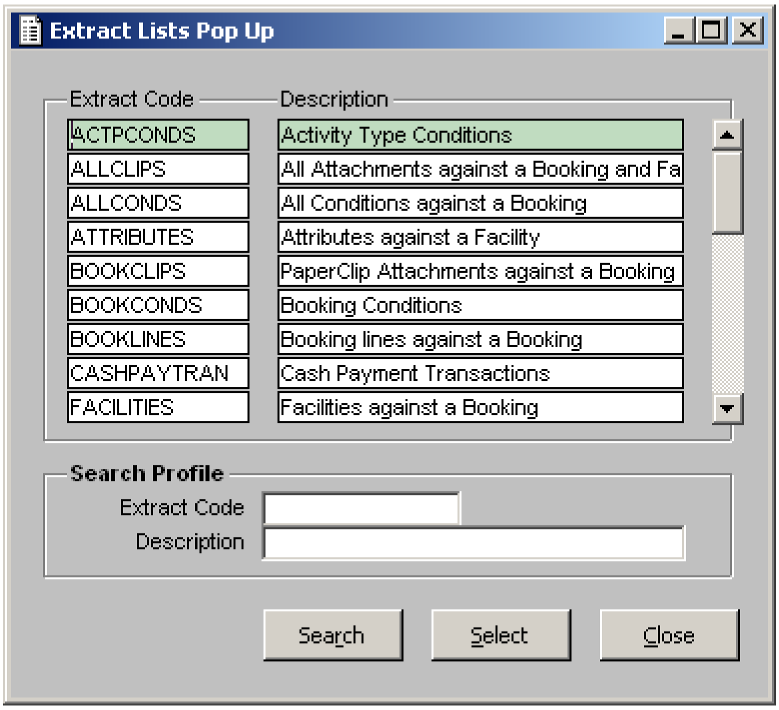
Word Processing

An outline of the Extract Type functionality for the Bookings Management module is outlined below. For more details please refer to the Word Processing User Guide.

Extract Types

An interface has been provided to the Pathway Word Processing module and allows the creation of Extract Types.

The Extract Lists that have been defined are as follows:



EXTRACT TYPE	**DESCRIPTION**
ACTPCONDS	Extract of all Activity Type Conditions – This extracts all Conditions against an Activity Type. The following fields are available: Condition Code Condition Descr Condition Type Descr Condition Apply Date Condition Lapse Date Condition Document Condition Comments
ALLCLIPS	Extract of all Attachments – This extracts all Paperclip Attachments against a Booking and its Facilities. The following fields are available: Booking Attachments Facility Attachments

ALLCONDS	Extract of all Conditions – This extracts all conditions against a Booking, providing all Conditions against the Facility, Activity Type and Booking. Any Conditions that are repeated will only be extracted once. The following fields are available: Booking Conditions Activity Type Conditions Facility Conditions
ATTRIBUTES	Extract of Attributes against a Facility – This extract allows the user to extract all the Attributes for each Facility linked to the Booking. The following fields are available: Attribute Code Attribute Descr
BOOKCLIPS	Extract of PaperClip Attachments – This extracts the PaperClip Attachments against a Booking. The following fields are available: Attachment File Attachment Description
BOOKCONDS	Extract of Conditions against a Booking – This extract allows the user to extract any Conditions that have been added against the Booking. I.e. a user may have chosen to associate a once off condition to a specified booking. The following fields are available: Condition Code Condition Descr Condition Type Descr Condition Apply Date Condition Lapse Date Condition Document Condition Comments
BOOKLINES	Extract of Booking Lines – This extracts the Booking date and Facility or Street/Suburb that has been linked. This list allows the extraction of the Discount Reason and Discount Percentage that has been applied. For each Line the total cost will also be extracted. This will be the sum of all the fees against the Facility and any Resources that have been linked to the Booking Date. The Booking Line Description and Booking Line Status is also able to be extracted. The following fields are available: Booking Date Booking Start Time Booking End Time Facility Code Facility Descr Booking Line Descr Booking Line Status Cancel Decline Reason Cde Cancel Decline Reason Dsc Fees

	Resources Properties Street Suburbs
CASHPAYTRAN	Extract of Cash Payment Transaction details – This extracts the following fields relating to a Cash Transaction.: Fee Transaction Type Transaction Date Amount Tax Amount Transaction Description
FACILITIES	Extract of Facilities – This extract lists all the Facilities that have been linked to the booking. The following fields are available: Facility Code Facility Descr Parent Facility Code Parent Facility Descr Facility Type Code Facility Type Descr Capacity Facility Details Conditions Resources Attributes Paperclip
FACLCLIPS	Extract of Facility PaperClip Attachments – This extracts the PaperClip Attachments against a Facility. This would be used where the user is extracting the Facility information for a Booking Request, and any PaperClip Attachments against the Facility are to be extracted. E.g. Site map, Photo etc. the following fields are available: Attachment File Attachment Description
FACLCONDS	Extract of Conditions against a Facility – This extract allows the user to extract all the Conditions against a Facility. The following fields are available: Condition Code Condition Descr Condition Type Descr Condition Apply Date Condition Lapse Date Condition Document Condition Comments
FEES	Extract of Fees on a Booking – This extract may be used on an Invoice, Estimate or Credit Note to extract the fees associated with the Booking. The fields extracted are as follows: Charge Description

	Fee Code Fee Description Calculated Amount Discount Amount Fee Total Amount Fee Tax Amount Originating Invoice In Relation To Type In Relation To Descr Booking Date Booking Start Time Booking End Time Note: If the Fee relates to an Activity, then the Start and End Times will not be extracted (because an Activity Fee is either Fixed or Daily and does not inherit the Start and End Times relating to the Booking Lines.)
LOCATIONS	Extract of all Locations – This extracts all Properties and Street/Suburbs for a Booking. The following fields are available: Properties Street Suburbs
NAMES	Extract of Names – This extracts the Names that have been recorded against the Booking request. The Extract Type allows filtering to be applied so that only Customers or only Affected Parties will be extracted. The following fields are available: Name Mailing Address
NOTES	Extract of Notes against a Booking – This extract allows the user to extract all the Notes against a Booking. A sort option of Descending or Ascending Date order will be provided so as to allow the user to determine which order the notes are extracted into the document. The user is able to filter by the Note Type to determine which notes to extract. In addition the user is able to define whether the Notes are extracted in descending or ascending date order. The following fields are available: Note Type Code Note Type Descr System Entered Date Time Note Date Time Officer Code Officer Descr Note
PROPERTY	Extract of Properties – This extract all Property links against a Booking. The following fields are available: Owner Address Address Single Line Property Key

RESOURCES	Extract of Resources against a Facility – This extract allows the user to extract all the Resources for each Facility linked to each Booking Line. The following fields are available: Resource Code Resource Descr Resource Type Code Resource Type Descr Resource Details
STRTSUBR	Extract of Street/Suburb – This lists all Streets/Suburbs linked to a Booking. This provides the Street Name and Suburb Name as available fields. The following fields are available: Street Suburb State Postcode

Extract of Fees – For each Booking Line the user is able extract the Fees that have been calculated and defined. The Fee Code, Description, Units, Amount, Total Cost are provided. This also includes the Nett, Gross and Discount Amount that have been applied to the Fee.

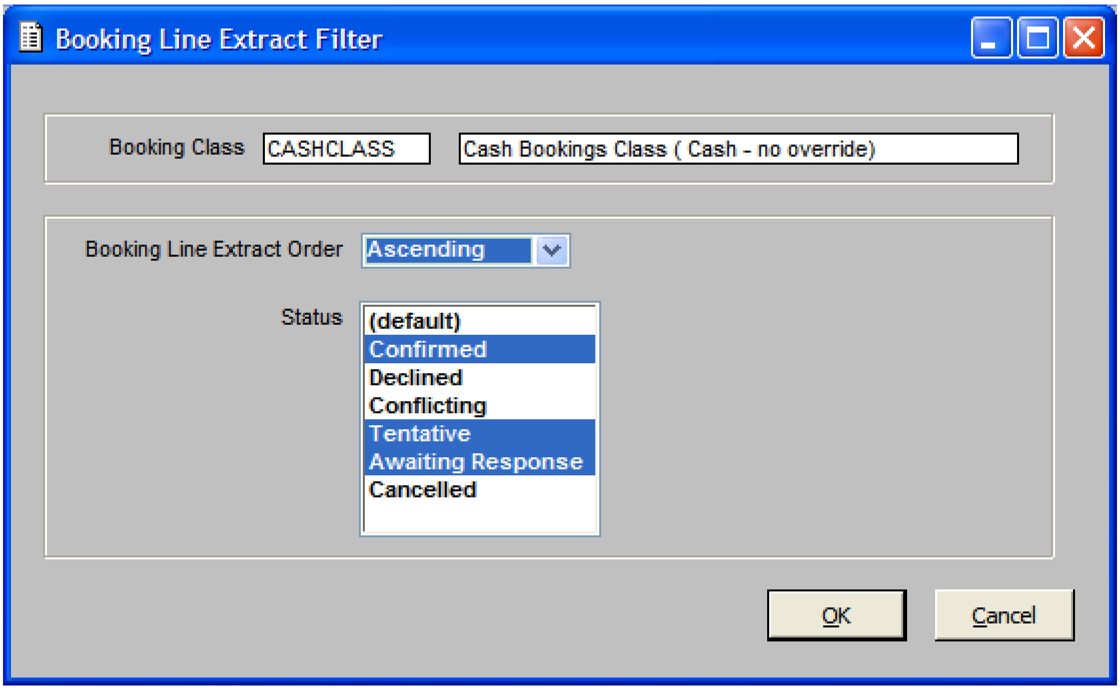
Booking Line Extract Filter

The Booking Line Extract Filter form displays when the Additional filter button is selected on the Extract type Maintenance form when maintaining an Extract type based on the BOOKLINES Extract List. It allows filtering by Booking Status.

If no Statuses are selected on the Booking Line Extract Filter, all Booking Lines will be included in the extract.

If specific Statuses have been selected for inclusion, Booking Lines will be included in the extract as follows:

a) If the Line Status is '(default)' and the System Status is 'Awaiting Council Approval', the line will be included only if the '(default)' Status has been selected for inclusion;
b) If the Line Status is '(default)' and the System Status is 'Awaiting Response', 'Confirmed' or 'Tentative', the line will be included only if the relevant Status (i.e. 'Awaiting Response', 'Confirmed' or 'Tentative') has been selected for inclusion;
c) If the Line Status is NOT '(default)', the line will be included only if the relevant Line Status has been selected for inclusion.



Booking Line Extract filter

Merge Types

An interface has been provided to the Pathway Word Processing module and allows the creation of Merge Types. A Merge Type is the template that is created by users to allow the generation of a letter to a person. Merge Types are also used to define Invoice, Estimate and Credit Note templates. When an Invoice, Estimate or Credit Note is generated the user selects the appropriate Merge Type to use.

Merge Types may be created and grouped into the following categories:

- Invoices
- Credit Notes
- Bond Invoices
- Bond Credit Notes
- Estimates
- Letters

The following list of merge fields is provided to extract data.

Activity Sub Type Code
Activity Sub Type Descr
Activity Type Code
Activity Type Descr
Affected Property
Affected Property StAddr
Booking Activity Details
Booking Activity Name
Booking Attendees
Booking Class Code
Booking Class Descr
Booking Number
Booking Status Code
Booking Status Descr
Booking System Status

Brought Forward
Carried Forward
Customer Type Code
Customer Type Descr
Doc Addressee SalCon
Doc Addressee Salutation
Document Appl DPBARCODE
Document Applicant Addr M
Document Applicant Addres
Document Applicant Comm 1
Document Applicant Comm 2
Document Applicant Comm 3
Document Applicant Comm D
Document Applicant DPID
Document Applicant Info 1
Document Applicant Info 2
Document Applicant Info 3
Document Applicant Info D
Document Applicant Name
Document Completion Date
Document Deflt Comm Descr
Document Deflt Info Descr
Document Expiry Date
Document Fee Amount
Document Issue Date
Document Lodgement Date
Document Name
Document Number
Document Path
Document Receipt Date
Document Receipt Number
Document Reference Date
Document Reference Number
Document Status
Estimate Total Amount (restricted to Estimate documents)
Estimate Total Discount (restricted to Estimate documents)
Estimate Total Tax Amount (restricted to Estimate documents)
Invoice Debtor Name (restricted to Invoice documents)
Invoice Debtor Number (restricted to Invoice documents)
Invoice Number (restricted to Invoice documents)
Invoice Total Amount (restricted to Invoice documents)
Invoice Total Discount (restricted to Invoice documents)
Invoice Total Tax Amount (restricted to Invoice documents)
Merge Class Code
Merge Class Description
Merge Type Code
Merge Type Description
Merge Type Name
Merge Type Path
Receiving Officer Code
Receiving Officer Descr
Responsible Officer Code
Responsible Officer Descr
System Entered Date
System Entered Time

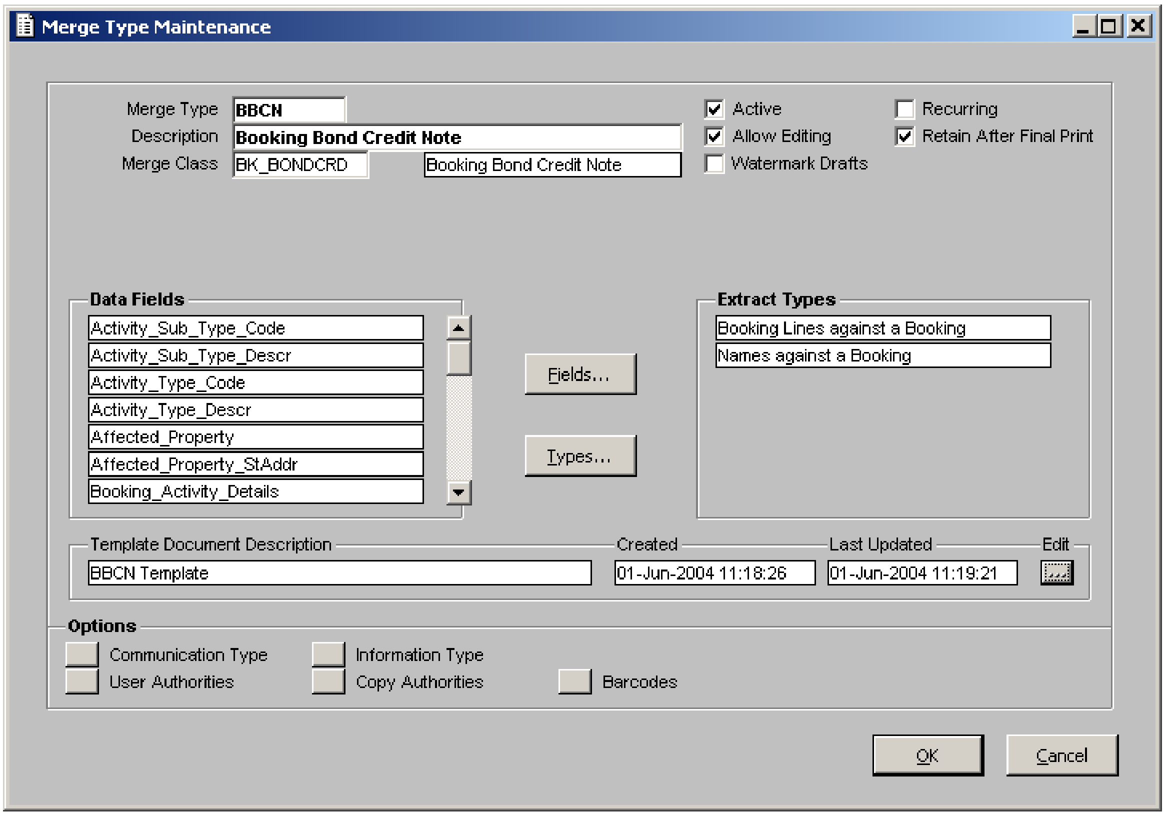
Standard Word Processing fields are available that allow the printing of the Document Addressee (the person receiving the letter) and the Document Addressee Mailing Address. The Mailing Address is determined in the following manner: if there is an overriding mailing address for the Document Addressee for this Booking Request, then the overriding mailing address will be used. If there is no overriding mailing address then the default address will be used. Note that this is standard Pathway functionality.

Merge Type Maintenance Form

The appropriate Merge Class is defaulted into this form depending on which Option button is selected on the previous form.

The user is able to nominate the fields to be extracted by clicking the 'Fields' button. This will present the user with a form listing all the available fields in the Bookings Management module.

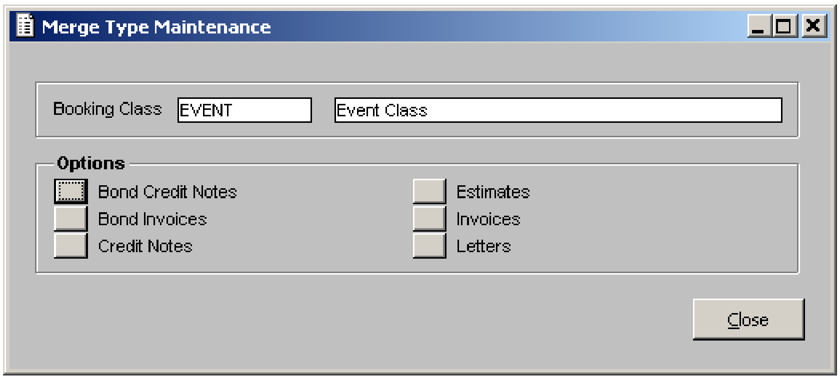
Additionally, the 'Types' button may be selected to display a list of Extract Types to be included in the Merge Type.



Merge Type Maintenance Form

Merge Type Maintenance Form

The Merge Type Maintenance form allows the user to define various document templates, e.g. Letter, Invoice, Estimate, Credit Note, Bond Invoice and Bond Credit Note.



Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Options
The Options buttons allow the setup and maintenance of various document templates. The following categories of Merge Types is available:

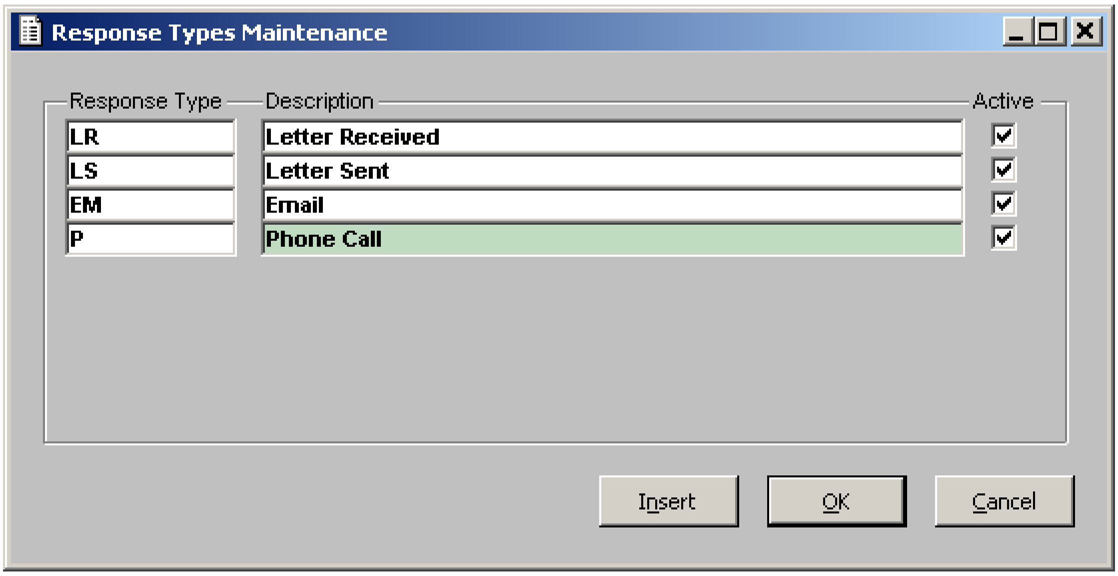
- Invoices
- Credit Notes
- Bond Invoices
- Bond Credit Notes
- Estimates
- Letters

Responses

The ability to create Response Types is available. This allows users to attach Responses to specific letters that are issued. This will be used primarily when letters are issued to Stakeholders or where a response is required in order to allow the event to continue. Responses are available as a separate option against a Booking Request to allow access to the Responses requested or received.

Response Types Maintenance Form

This form is a standard Word Processing form which is utilised by Bookings Management to create and maintain Responses for attaching to specific letters issued by the Bookings Management system.



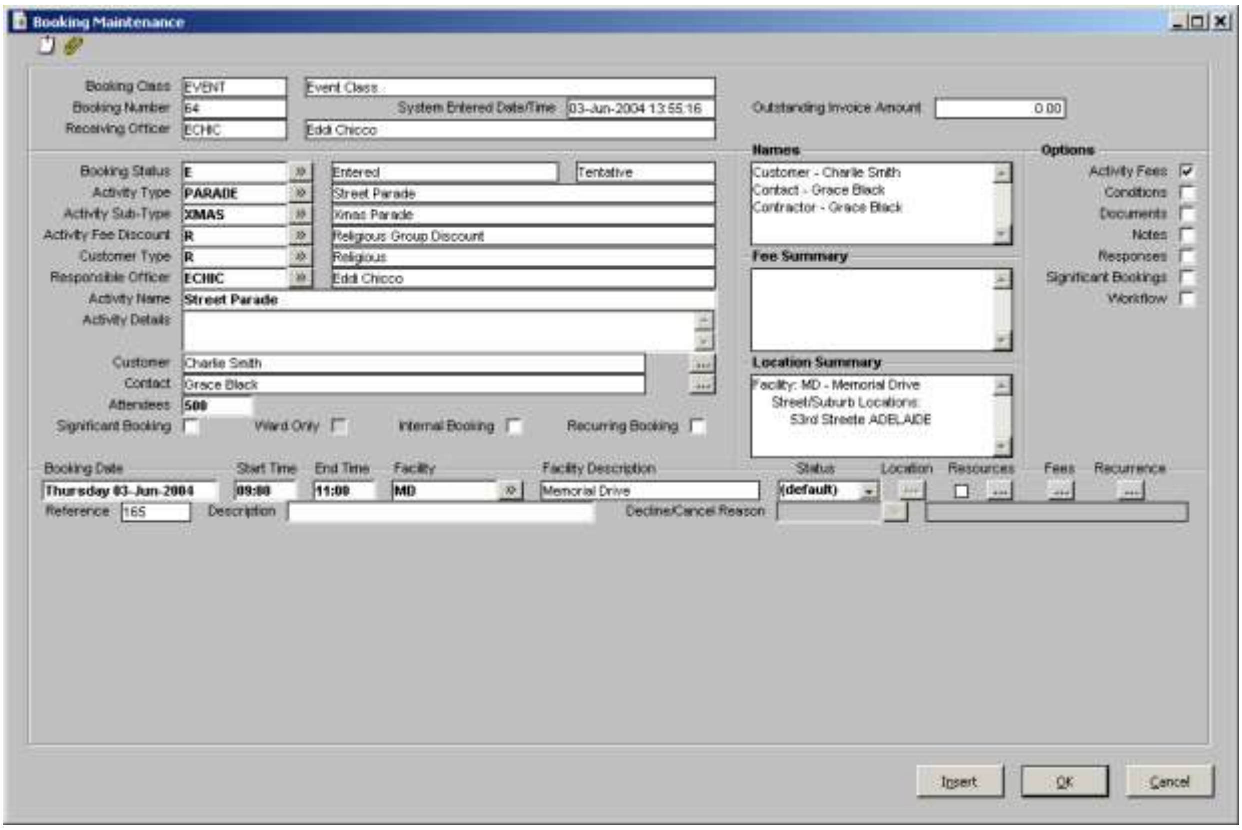
Response Types Maintenance form

Paperclip Attachments

Paperclip Attachments are available in the Bookings Management module. This function allows documents, images and objects to be linked to a Pathway Entity and be viewed from within Pathway.

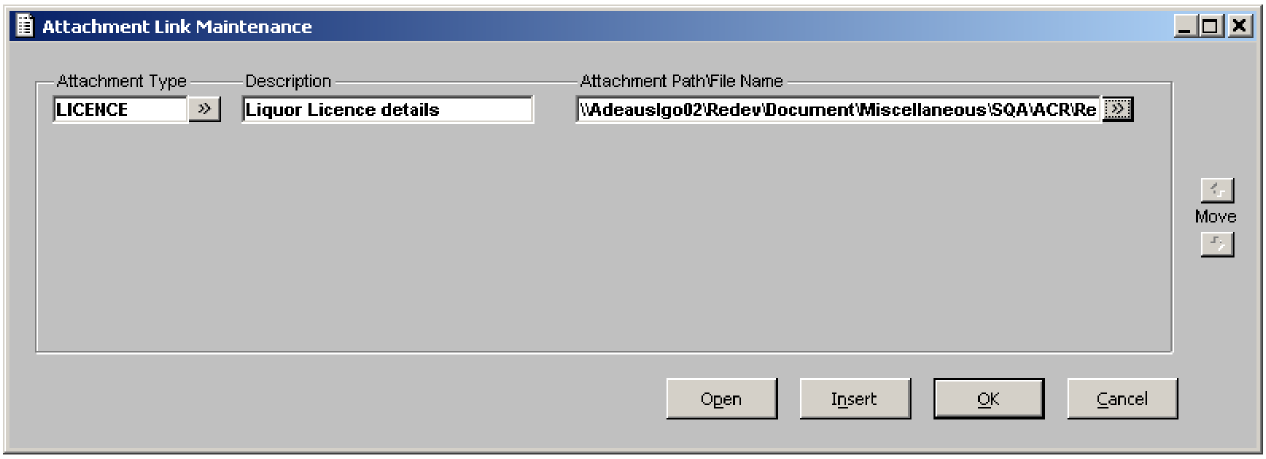
The attached objects can be readily accessed/viewed from the Booking Maintenance Forms, by selecting the Paperclip Icon that appears at the top of screen.

Attachments may be linked to Facilities and Booking Requests. When a Facility is added to a Booking Request, any Attachments linked to the Facility are copied to the Booking Request. The Document Path and Description are used as the 'key' values when processing Attachments to avoid having the same Document or File linked to the Request more than once.



Booking Maintenance form showing Paperclip Icon at the top of the form

In addition, by utilising the Paperclip Attachment function to hold attachments, the ability is available to include these into Invoices and Letters via Extract and Merge Types as well as have them registered within Document Management Systems where applicable.



Paperclip entry screen accessed via Menu Option: Associated>Attachment

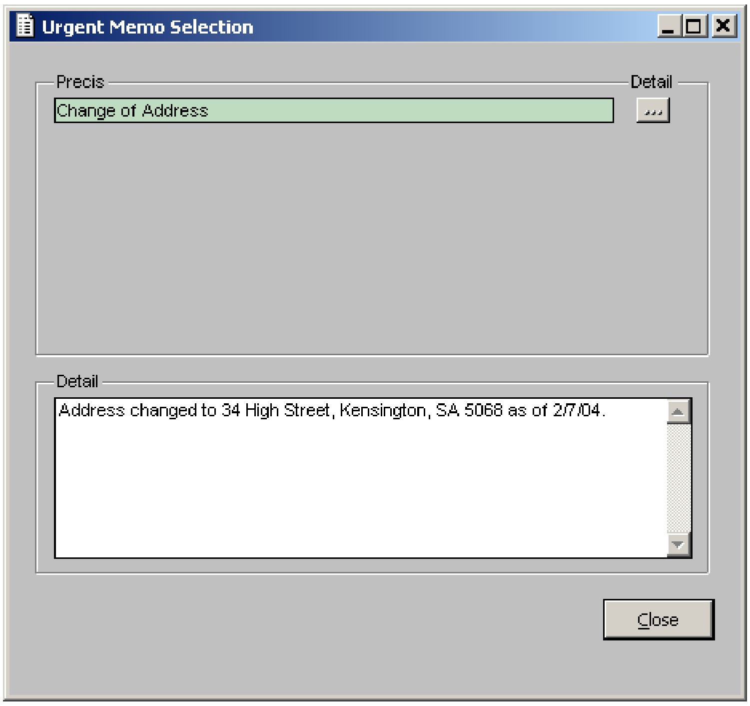
For more information on Paperclip Attachments please refer to the Paperclip Userguide (CDC.PDF).

Memos

The Memo function provides the ability to append additional free format information to a Booking Request. This feature is useful where no specific field or facility exists to capture the required data.

Memos may contain textual data and be optionally linked to video files, sound files, image files, documents or spreadsheets.

Certain memo types may be established as “urgent”, in which case the memo record will be displayed on the screen whenever the record to which it is attached is requested.

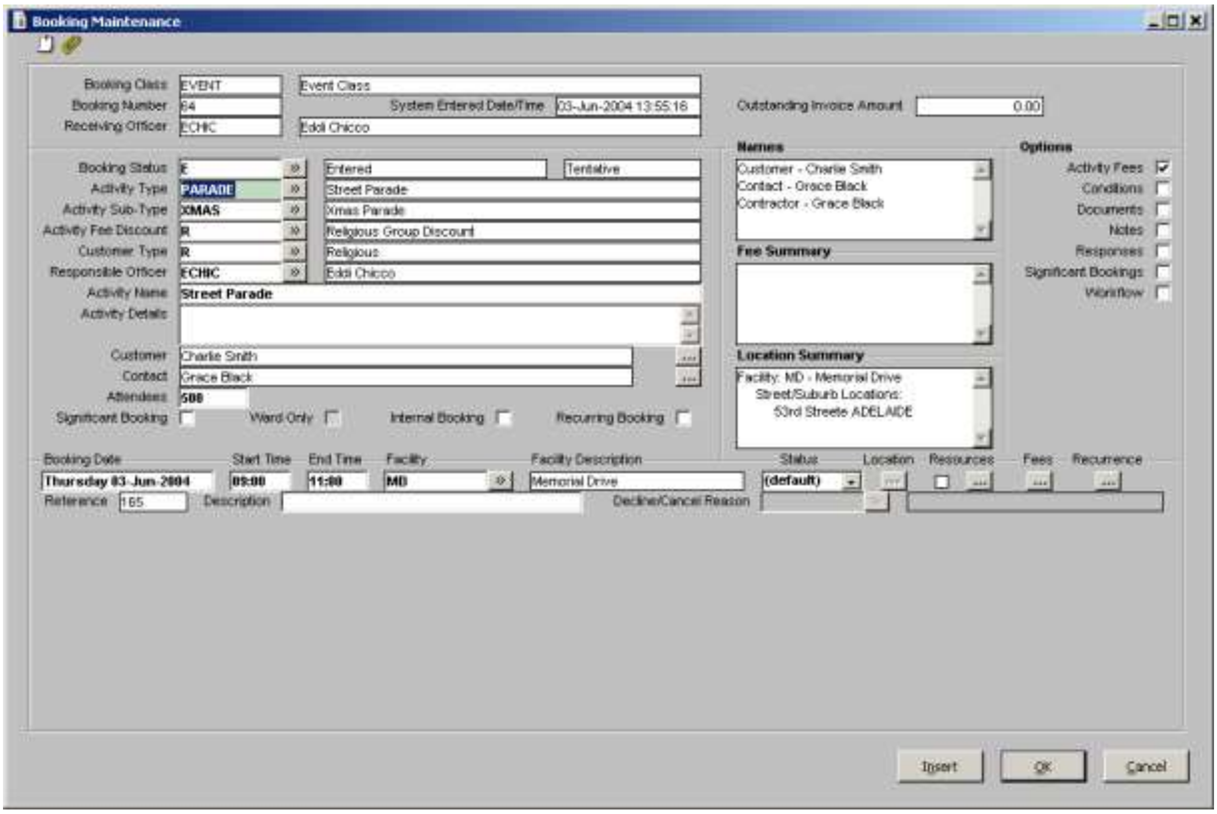


Urgent Memo Selection form which displays whenever the Booking Request is accessed

Each memo has effective and termination dates associated with it. In this way the system may be automatically purged of all expired memos.

The existence of Memos on the Booking Request is indicated by the Memo Icon  at the top of the form. Double-clicking this icon will open the Memo.

To add a Memo to a Booking Request, select the Associated Option from the Menu Bar at the top of the screen, then select Memo. Alternatively, if Memos already exist, double-clicking the Memo Icon will allow the addition of new memos.



Booking Request showing the Memo Icon at the top of the form

For more information on Memo functionality please refer to the Memo Userguide. (CMO.PDF)

Customer Profile

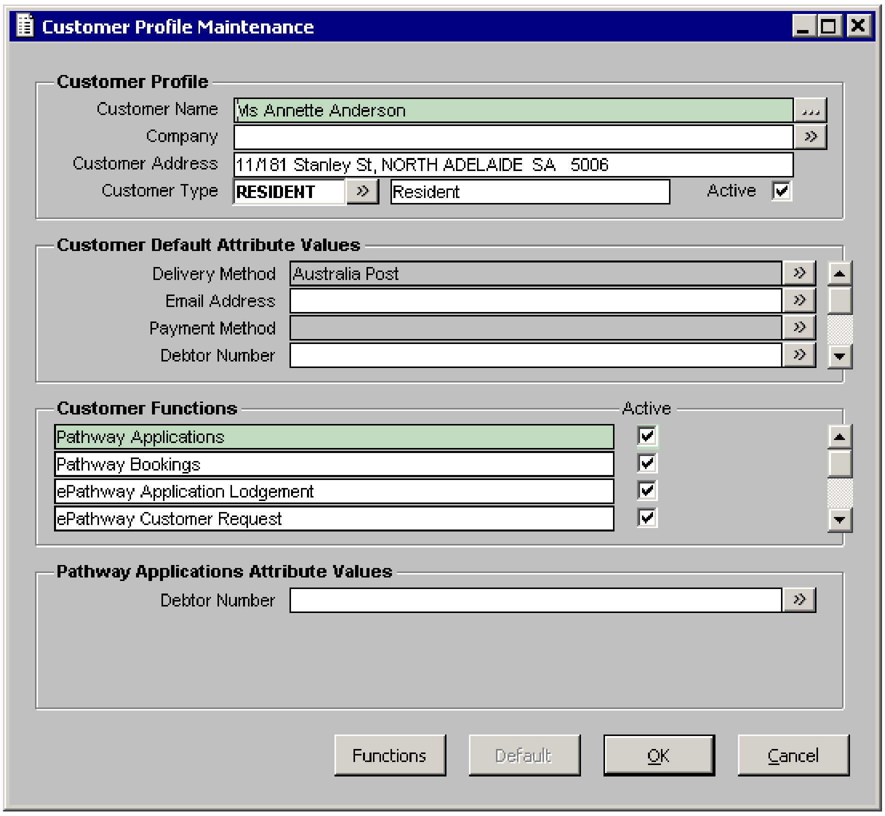
The Customer Profile function is utilised to record the Debtor details for a Customer in the Bookings Management Module.

The Customer Profile provides a “Customer Function” called Pathway Bookings Management, and the Debtor along with the appropriate default settings are able to be set. These settings will apply whenever the “Customer” is linked to a Booking Request.

Customer Profile details will automatically be created for a person/company from the Name and Address module if they do not exist. This is all performed by the software and does not require any input from the user.

However, the user is required to create the Debtor details for the person. See further details under Customer in Booking Entry.

The Debtor Number will be linked via this function, and the user is able to set the Delivery Method for the invoices and the payment method.



Customer Profile Maintenance form

External Activities

External Activities, a function which allows a council to record External Activities, is available via a separate menu option. A Council is able to record the existence of an External Activity when staff entering Bookings are required to be notified of activities that are occurring outside of council control.

External Activity notification will be displayed to users when entering a new Booking Request where External Activities meet the following requirements:

The Booking that is being entered falls into the date range that the Start and End Date of the External Activity applies to.

The current date falls between the Notification Start and End Dates.

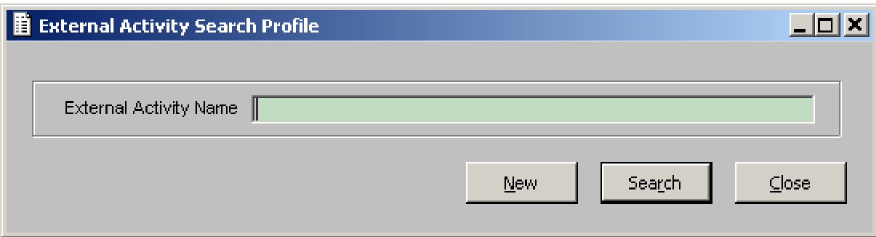
Consider the following External Activity

Start Date\Time – 1\1\2004 11:00:00
End Date\Time – 1\1\2004 17:00:00
Details – New Years Day celebrations
Notification Start Date – 1\12\2003 9:00:00
Notification End Date – 1\1\2004 11:59:00

The above External Activity will be displayed when any new Booking Request is entered between the first of December 2003 and the first of January 2004. Once the Notification End Date has been passed then the message will not be displayed, i.e. a New Booking Request entered on the 2nd of January will not have the External Activity displayed.

External Activities Search Profile Form

The External Activities Search Profile allows the user to create a new External Activity or search for an existing one.

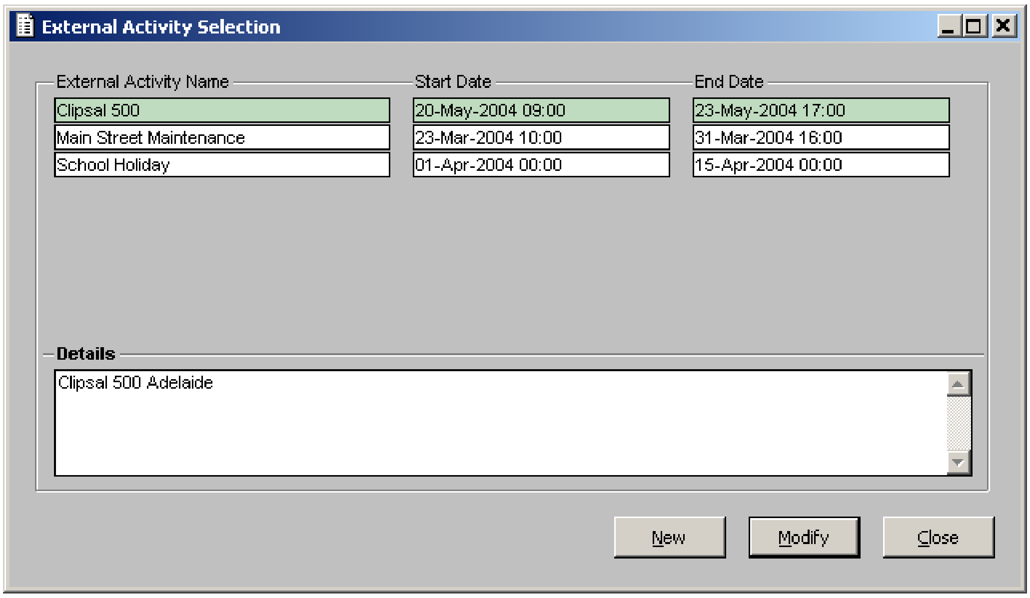


External Activities Search Profile form

External Activity Name
Enter an External Activity Name on which to conduct a search and select the search button. Wildcard (*) searching is available.

External Activity Selection Form

This form allows the user to create a new External Activity or select an existing one. Click the New button or place focus on the required Activity and select the Modify button.



External Activity Selection Form

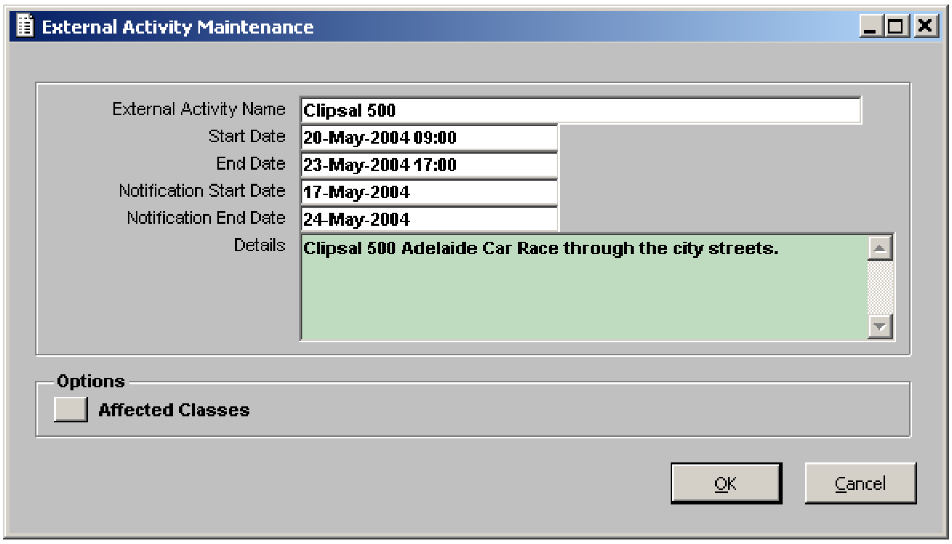
External Activity Name
This field displays the External Activity Name, e.g. Clipsal 500. This field is display only.

Start Date/End Date
These fields display the Start and End Date and Time of the External Activity. These fields are display only.

Details
This field displays further details of the External Activity, e.g. Clipsal 500 car race held annually in the East Parklands.

External Activity Maintenance Form

The External Activity Maintenance form allows a council to record any External Activities which need to be taken into consideration when a booking is to be made. Notification of an External Activity is automatically displayed to users when entering a new Booking Request where the Booking Request is scheduled to occur during the same dates as the External Activity.



External Activity Maintenance Form

External Activity Name

This field allows a Name to be entered to describe the External Activity, e.g. Clipsal 500. This field is a mandatory text field of up to 50 characters.

Start Date/End Date

These fields record the Start and End Date and Time of the External Activity. They are mandatory Date/Time fields and may be keyed in or a date and time selected from the Calendar Pop Up by double clicking or pressing F2 in the field.

Notification Start Date

This date is entered by the user and signifies the Start Date that the notification will be displayed to users when Bookings are being entered. It is a mandatory Date field and may be keyed in or a date selected from the Calendar Pop Up by double clicking or pressing F2 in the field..

Notification End Date

This date is entered by the user and signifies the End Date that the notification will be displayed to users when Bookings are being entered. It is an optional Date field and may be keyed in or a date selected from the Calendar Pop Up by double clicking or pressing F2 in the field..

Details

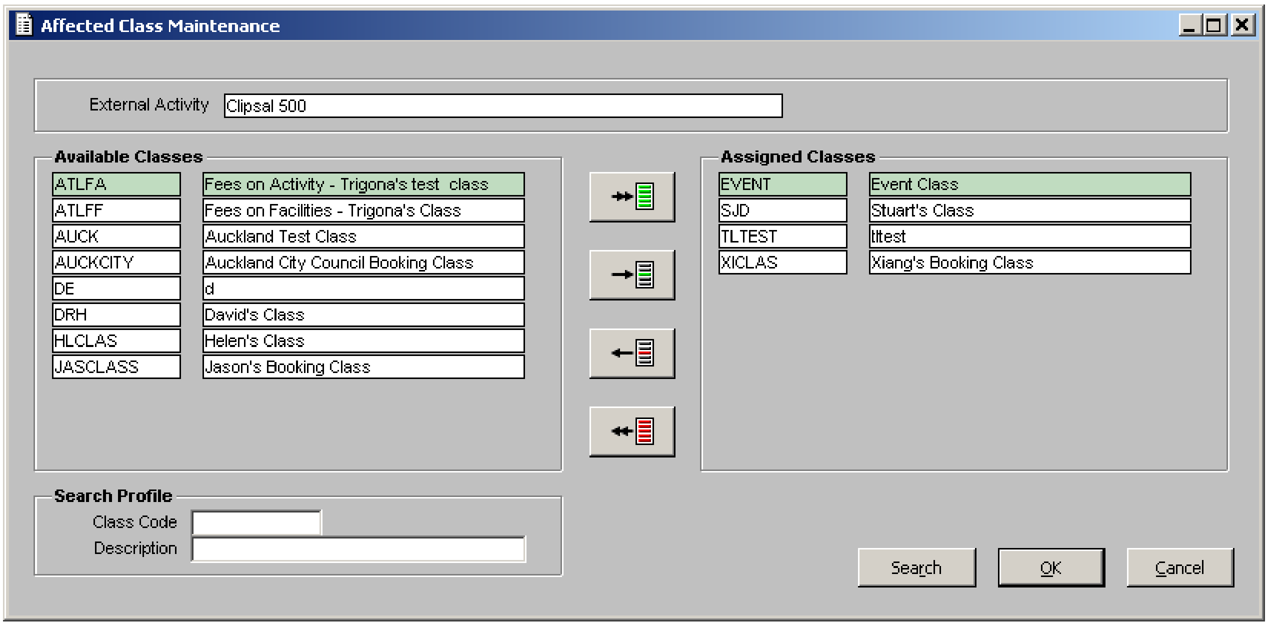
The Details field is an unlimited text field that allows the user to enter a description of the External Activity, e.g. Clipsal 500 car race held annually in the East Parklands.

Options – Affected Classes

Selection of the Affected Classes Option button displays the Affected Class Maintenance form where Booking Classes may be assigned as potentially affected by the External Activity.

Affected Class Maintenance Form

The Affected Class Maintenance form allows the user to select specific Booking Classes which would potentially be affected by an External Activity ensuring that the user is notified of any scheduled External Activities which need to be taken into consideration during a Booking Request.



Affected Class Maintenance form

External Activity
This field displays the selected External Activity, e.g. Clipsal 500. This field is display only.

Available Classes
These fields display the Booking Classes which are available for the user to assign as Affected Classes using the ‘Select’ and ‘Select All’ buttons.

Assigned Classes
These fields display the Booking Classes which have been assigned as Affected Classes for the purposes of notification of clashes with External Activities. The ‘Remove’ and ‘Remove All’ buttons can be used to unassign one or more Classes or all Classes as required.

Search Profile – Class Code/Description
Enter a Class Code and/or Description on which to base your search and then select the Search button. This function is useful when there are more than 9 Classes to search through.

Bookings Entry/Enquiry

The following topics are covered in this section:

Bookings Entry/Maintenance/Enquiry

A Booking Request is a request from a Customer to book and use Facilities or apply to council to hold an Event.

Booking Requests are created within each class. Booking Numbers are not unique within each class, i.e. The Facility Class will have Booking Request 1 and the Event Class the next Booking Request Number of 2. This approach is being taken so that documents generated from the Bookings Management module will be able to have the same Booking and Payment Reference. A Payment Reference must be unique for the Bookings Management module, and to avoid having two numbers, a single number has been utilised.
This is the Booking Request Number. The Booking Request Number is allocated when Booking Request Maintenance is accessed. This means that if the user enters Booking Request Maintenance, and then does not save the request, the Booking Number will have been used and will not be used again.

Security assignment will be checked and allow maintenance of Booking Requests to the appropriate users.

Booking Search Profile Form

The Bookings Search Profile allows for Booking Requests to be searched over using Booking Request details. This includes searching over booking information. The selection screen will display Booking Requests found meeting the entered criteria.

Booking Status (System Booking Status) is available for searching, i.e. display all the "tentative" bookings.

In addition the search profile form allows the user to search over Facility information to find available Facilities. This is where the user is searching for a venue to book out to someone. The entry of the number of expected attendees is allowed on the Search Profile so that a user may choose to search for a Facility that has the capacity to accommodate that number of people. The search will display Facilities that meet the search criteria.

Once a display of available Facilities is provided the user is able to select the Facility and create a Booking Request. The selected Facility is automatically linked to the Booking Request.

The 'New' button is used to create a new Booking Request.

The Available Facilities button displays the Available Facility Search Profile where a search may be performed on Facilities available on the required date and time with specific Resources and Attributes available.

Calendar Views
The Booking Search Profile also allows access to the Weekly and Monthly Calendar views. Search Profile data entered in the 'Booking Details' section of the form will be used to subset the displayed Bookings on the Calendar.

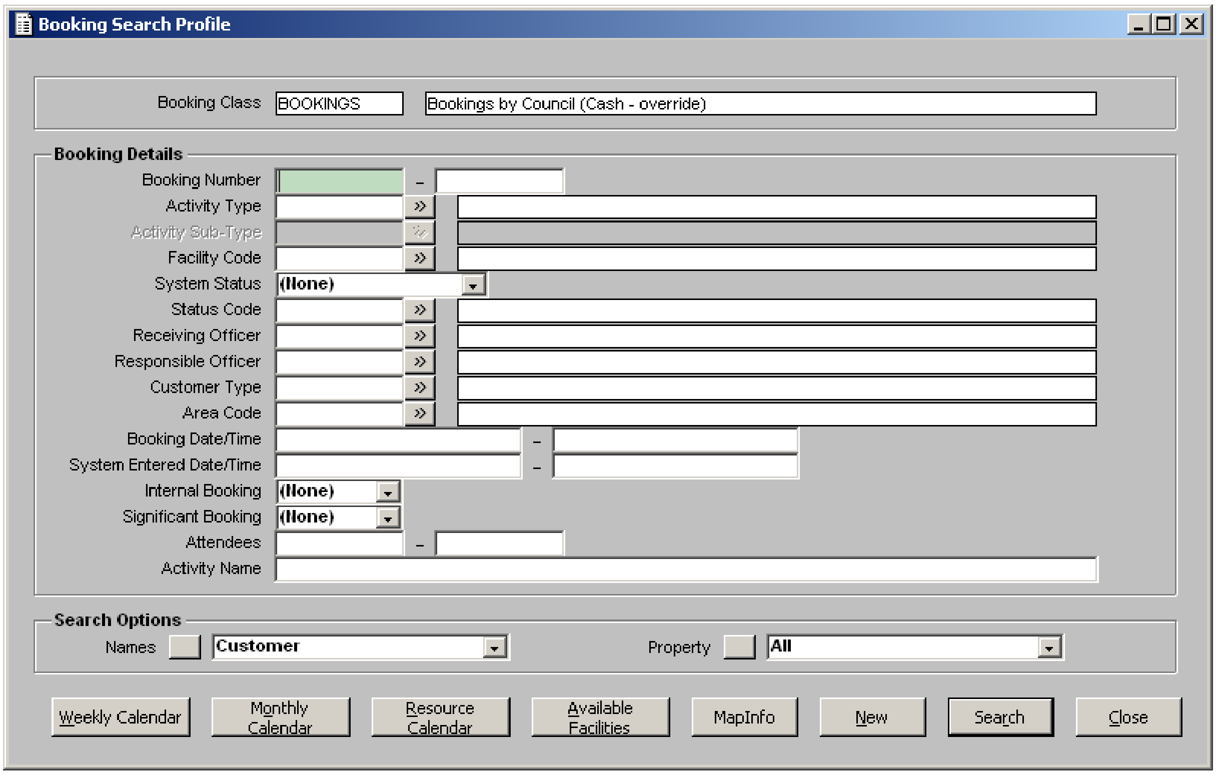
Note: The Booking Date/Time field is treated in a special way however. Only the 'From' value of this field is used (as shown on the example above), and only the Date portion of the field is referenced. This date sets the start date for the Weekly Calendar view and the month to be displayed on the Monthly Calendar view. If no value is entered then the date will default to 'Today'.

A Facility Code can also be entered to select a specific Facility to display Bookings for.

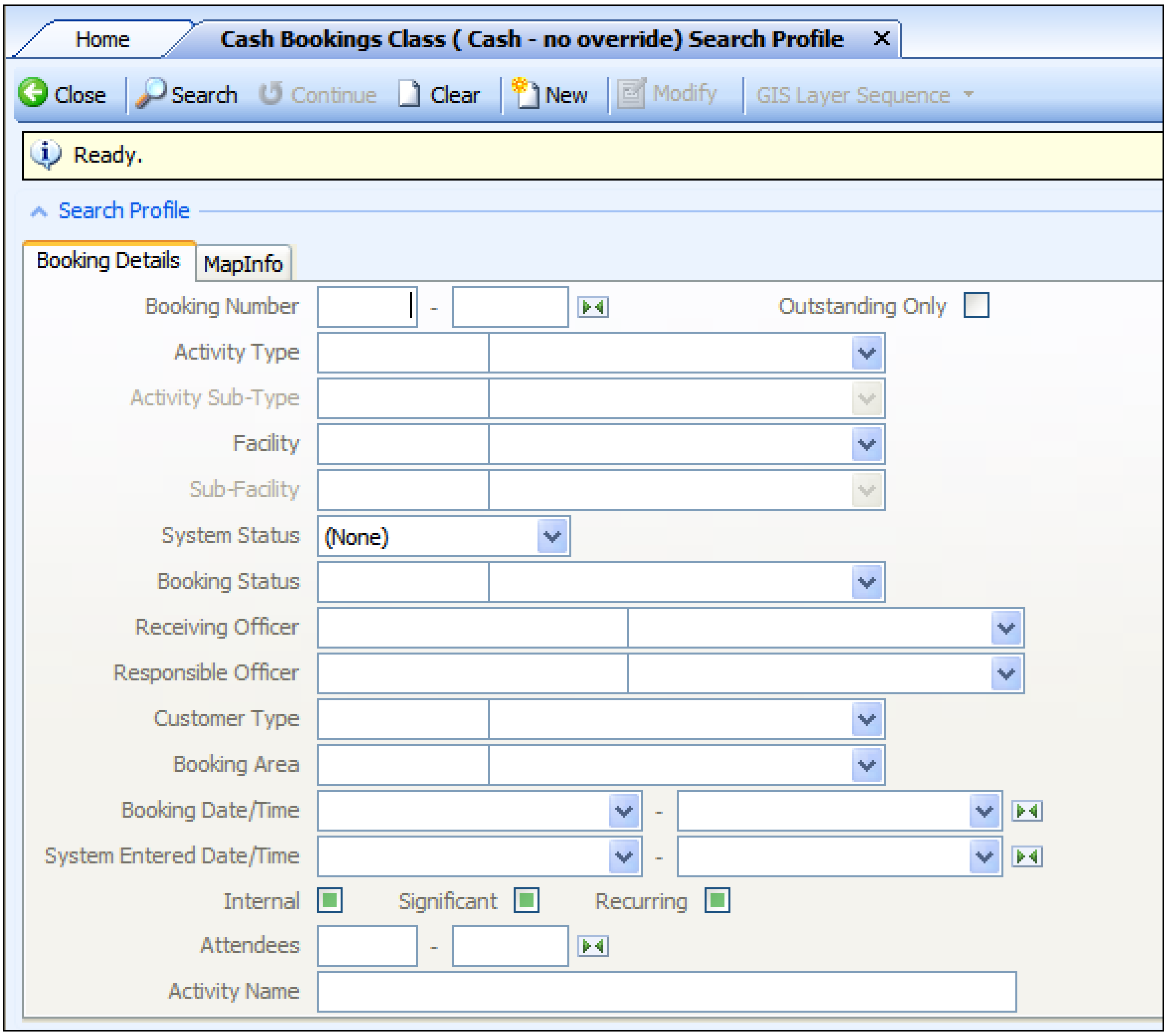
NOTE: All other Search Profile criteria are subordinate to these two values. All Bookings displayed will always be within the Week or Month of the Booking Date entered, including any Booking Numbers. This differs from the normal search profile behaviour where the entry of a single Booking Number will go to that particular Booking regardless of the value of any other Search Profile criteria.

NOTE: Where the Weekly Calendar is not available, the “Weekly Calendar” button will not be shown. In this situation the only available Calendar will be the Monthly view.

NOTE: When Search Profile Data is used, the Weekly Calendar will display a Frame Label at the top right of the Calendar form and also an ‘info’ message in the Task Bar when the search profile has resulted in a ‘subset’ of Bookings being displayed. If no message is displayed then all the available Bookings have matched the search profile.



Booking Search Profile form (thick client)



Booking Search Profile form (smart client)

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number

Enter a Booking Number range on which to base your search and then select the Search button. These fields may be used in combination with other fields in the search profile.

Outstanding Only

The Outstanding Only flag (only available in the smart client) can be checked ON to retrieve those Bookings with an outstanding Total only.

Activity Type

Enter an Activity Type Code on which to base your search, or select one from the Pop Up, and then select the Search button. This field may be used in combination with other fields in the search profile.

Activity Sub-Type

Once an Activity Type has been selected the Activity Sub-Type fields will become available. Enter an Activity Sub-Type Code on which to base your search, or select one from the Pop Up, and then select the Search button. This field may be used in combination with other fields in the search profile.

Facility Code

Enter a Facility Code on which to base your search, or select one from the Pop Up, and then select the Search button. This field may be used in combination with other fields in the search profile.

System Status

The system Status field provides a dropdown to allow the user to select a specific System Status to search on. If a selection is made in this field, then the options available for selection in the Status Code field will be restricted to those pertaining to that particular System Status. The options available are as follows, with the default set to (none):

- (none)
- Tentative
- Awaiting Response
- Confirmed
- Available for Booking

Status Code

The Status Code field allows searching on Booking Requests which have one of the user-defined Booking Statuses. These statuses are based on the four System Statuses. Enter a Status Code on which to base your search, or select one from the Pop Up, and then select the Search button. This field may be used in combination with other fields in the search profile.

Receiving Officer

Enter a Userid on which to base your search, or select one from the Pop Up, and then select the Search button. This field may be used in combination with other fields in the search profile.

Responsible Officer

Enter a Userid on which to base your search, or select one from the Pop Up, and then select the Search button. This field may be used in combination with other fields in the search profile.

Customer Type

Enter a Customer Type Code on which to base your search, or select one from the Pop Up, and then select the Search button. This field may be used in combination with other fields in the search profile.

Area Code

Area is available on the Bookings Search Profile screen to allow users to search for Facilities or Requests in an Area. Key in an Area Code or select one from the Pop Up, then press the search button. This field may be used in combination with other fields.

Booking Date/Time

These fields allow the user to search for Bookings Requests which have Booking Lines with a Booking Date that falls within a specified date range. Enter a Date/Time Range on which to base your search, or make a selection from the Calendar Pop Up, and then select the Search button. (Pressing F2 or double-clicking in the fields will display the Calendar Pop Up). This field may be used in combination with other fields in the search profile.

System Entered Date/Time

These fields allow the user to search for Booking Requests where the Booking Request was created within a specified date range. Enter a Date/Time Range on which to base your search, or make a selection from the Calendar Pop Up, and then select the Search button. (Pressing F2 or double-clicking in the fields will display the Calendar Pop Up). This field may be used in combination with other fields in the search profile.

Internal Booking

The Internal Booking dropdown list allows the user to specify whether the search should be restricted to Bookings flagged as Internal (i.e. On), or alternatively, excluding those flagged as Internal (i.e. Off). To include both settings then the (none) option should be used. The options available from the dropdown are as follows:

- (none)
- Off
- On

In the Smart client this button is a tri-state checkbox. It will retrieve all Bookings when the setting displays as a square; only Internal Bookings when the setting displays as a tick, and only Bookings that are NOT Internal when the setting displays as a blank.

Significant Booking

The Significant Booking dropdown list allows the user to specify whether the search should be restricted to Bookings flagged as 'Significant Bookings' (i.e. On), or alternatively, excluding those flagged as 'Significant Bookings' (i.e. Off). To include both settings then the (none) option should be used. The options available from the dropdown are as follows:

- (none)
- Off
- On

In the Smart client this button is a tri-state checkbox. It will retrieve all Bookings when the setting displays as a square; only Significant Bookings when the setting displays as a tick, and only Bookings that are NOT Significant when the setting displays as a blank.

Recurring Booking Checkbox

This checkbox is only used in the Smart Client. It is a tri-state checkbox. It will retrieve all Bookings when the setting displays as a square; only Recurring Bookings when the setting displays as a tick, and only Bookings that are NOT Recurring when the setting displays as a blank.

Attendees

These fields allow a numeric range to be entered on which to base your search. This search will find any Bookings with Maximum Attendees set to a number which falls within this range.

Activity Name

This field allows an Activity Description to be entered as part of the search profile. Wildcard characters are allowed.

Search Options – Names

The Names Search Option allows the user to specify a Name Role Type from the list below and perform a search for a Booking Request where the selected Name is associated under the appropriate Role Type for the Booking:

- Customer
- Contact
- Stakeholder
- Facility Owner
- Contractor
- Facility Manager
- Contractor
- Affected Party

For example:
Selecting the 'Customer' Role Type and clicking the option button allows the user to search for a name and retrieve all occurrences of that name linked as a Customer to a Booking. The Booking Request is then able to be retrieved.

Search Options – Property

The Property Search Option allows the user to specify a Property Role Type from the list below and perform a search for a Booking Request where the selected Property is associated under the appropriate Role Type:

- All
- Booking Facility Property
- Booking Facility Street
- Booking Line Street

Weekly / Monthly / Resource Calendar Buttons

The **Weekly and Monthly Calendar** Buttons on the Search Profile form allow the user to specify a Search Profile similar to the standard selection process, but with the following differences:

- The Booking Date/Time profile field allows the user to specify the starting Date for the Calendar. Only the ‘From’ Date and Time is used, whilst the ‘To’ Date and Time Value will be ignored. If nothing is entered, then the Calendar assumes ‘Today’ as the starting Date.

- If the user enters a Booking Number, or Booking Number Range, these will be applied to the Bookings found within a Week from the starting Date. Unlike the normal Search process where a single Booking Number entry will take the user directly to that Booking regardless of the other Search Profile values, the Calendar forms will ALWAYS subset any search profile data within the Week of the starting Date.

- The Weekly Calendar is designed to work with Bookings for a specific Facility. However, it does allow for the display of ALL Bookings in a Week regardless of Facility. The initial Facility may be selected if required from the Search Profile screen.

Where the Weekly Calendar is not available, the Weekly Calendar Button will not be shown. In this situation, the only available Calendar will be the Monthly view.

Facility Weekly and Monthly Calendars will display instead of the normal Bookings Weekly and Monthly Calendars if the Council is authorised to them and has them turned ON at the class Parameters level. In addition, the Authorisation Code will give the Council access to the Resource Calendar.

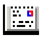
Note: This is an authorised function. This means that the functionality will only be available if you are authorised to use it. If customers do not have this option and require the functionality then it is advisable that they contact their account manager to organise the purchase of this function.

Available Facilities Button
This button displays the Available Facility Search Profile where further search criteria may be entered to refine the search.

This button is also available in Enquiry mode.

Bookings Weekly Calendar Form

Note: The Weekly Calendar is an authorised function. This means that the Weekly Calendar will only function if you are authorised to use it. If customers do not have this option and require the ability to use the Weekly Calendar in Bookings then it is advisable that they contact their account manager to organise the purchase of this function.

The Weekly Calendar displays when the Weekly Calendar Button is selected on the Search Profile. It will also display when the Calendar Button  is selected on the Booking Maintenance form.

It displays all Bookings within a selected seven day period. This includes any Bookings that have been ‘Cancelled’ or ‘Declined’.

Bookings can be displayed for a specific Facility (as shown below), or all Bookings for all Facilities for the current Booking Class can be shown.

When Bookings are displayed for a specific Facility, the Booking Numbers are prefixed with a character to further identify the type of Booking. These characters are:

- ‘F’ – Facility Bookings (this can mean the sub-facility which is being enquired on)

- ‘S’ – Related ‘sibling’ Sub-Facility Bookings
- ‘P’ – Related Parent Facility Bookings (if booking is a result of ‘autobooking’)

When all Bookings are being displayed, only the Booking Number is shown.

Each one hour time block is coloured to indicate the status of the Booking within that time. The Calendar will also indicate when a Facility is ‘Available’, i.e. its open times. [The Legend of colours is user modifiable at the system level via the ‘System Administration>>System Parameters>>Video Attribute Colour Maintenance’ Menu option]

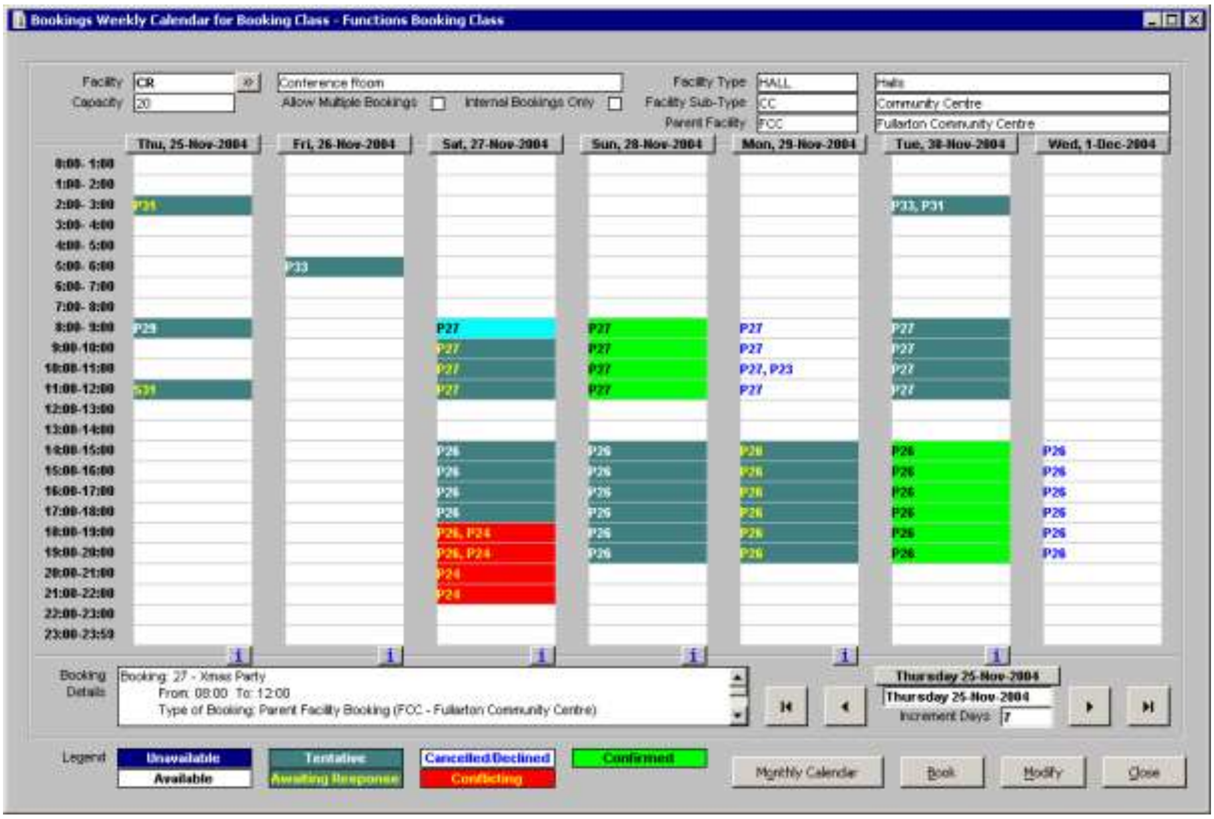
An Information Button  will display on each Day where Related Bookings and/or external Activities that may impact Bookings on that Day exist. It will also display on any day where a Booking exists for a Facility that allows Multiple Bookings.

The Calendar time blocks can be ‘multi-selected’ using the mouse and keyboard. These selections can then be passed to Booking Entry by using the ‘Book’ button to create a new Booking. Where the selections include existing Bookings, the ‘Modify’ button may be used to access those Bookings.

Navigation Buttons and fields allow the Calendar to be repositioned as required. This includes moving backwards or forwards by one Day or a user –definable number of Days, and repositioning a particular Day as the first Day on the Calendar display or resetting the Calendar back to its original starting Date.

When the Calendar Button is selected from within a Booking Request the Weekly Calendar will display starting at the date of the Booking, with focus on the first time block. The Calendar will be in ‘Facility’ mode with the Facility of the Booking Line displayed. The ‘Modify’ button becomes a ‘Display’ button indicating that the Calendar is not maintainable when called from ‘Booking Entry’. Any Bookings that exist in the week will be shown on the Calendar with a prefix character in front of the Booking Number, i.e. ‘F’ for Facility Bookings, ‘S’ for Sub-Facility Bookings and ‘P’ for Parent Facility Bookings, e.g. F29.

The Information Detail button will display for any day where ‘Related Bookings’ exist for the Facility.



Bookings Weekly Calendar

Facility Details

The Facility field and pop up in the top frame of the form allow the user to select or change the Facility for the displayed Week. This may be left blank to show all Facilities. If a Facility is selected, the top frame of the form will display useful details about the Facility including the following:

- Facility Name and Description
- Facility Type and Sub-Type
- Parent Facility
- Capacity
- Allow Multiple Booking indicator
- Internal Bookings Only indicator

Calendar Time Blocks

The body of the form shows the Calendar itself. This is represented as 7 daily columns divided into 24 one hour time blocks.

Each column (Day) has a heading button that details the Day and Date of that column. Clicking on this button will move that Day to the beginning of the Calendar.

Each time block will be coloured based on the Status of the Booking(s) within that time block. A 'Conflicting' Status will always override any other Status.

Each time block, where there are Bookings, will display a simple list of the Booking Number(s) within that time block (in descending order). Where there is no specific Facility chosen, this will be just a list of the Booking Number(s). However, where a Facility has been specified, the Booking Number(s) will be prefixed with a character to identify the type of Facility Booking. These will be as follows:

- "F" for Facility Bookings
- "P" for Parent Facility Bookings (where the currently displayed Facility is an 'Autobook' Sub-Facility)
- "S" for Sub-Facility Booking (where the Booking is for another Sub-Facility of the same Parent Facility).

Each column (Day) can have a footer button displayed. This is the 'Information' button, i.e.  and will be shown if there are any 'Related' Bookings or Activities occurring throughout that Day (Date). Clicking on this button will take you to the standard Related Bookings Enquiry form.

Navigating the Calendar Time Blocks is simple. When focus is within the body of the Calendar, the Up/Down arrow keys will move focus one occurrence up or down the Day column. When the top or bottom of a column is reached, then focus will move to the bottom or top of the next/previous column. The TAB key will move focus one occurrence to the right through the Calendar. When the end of the Calendar is reached, then focus will jump out of the Calendar to the fields at the bottom of the form.

Double-clicking on a Time Block will perform one of the following functions:

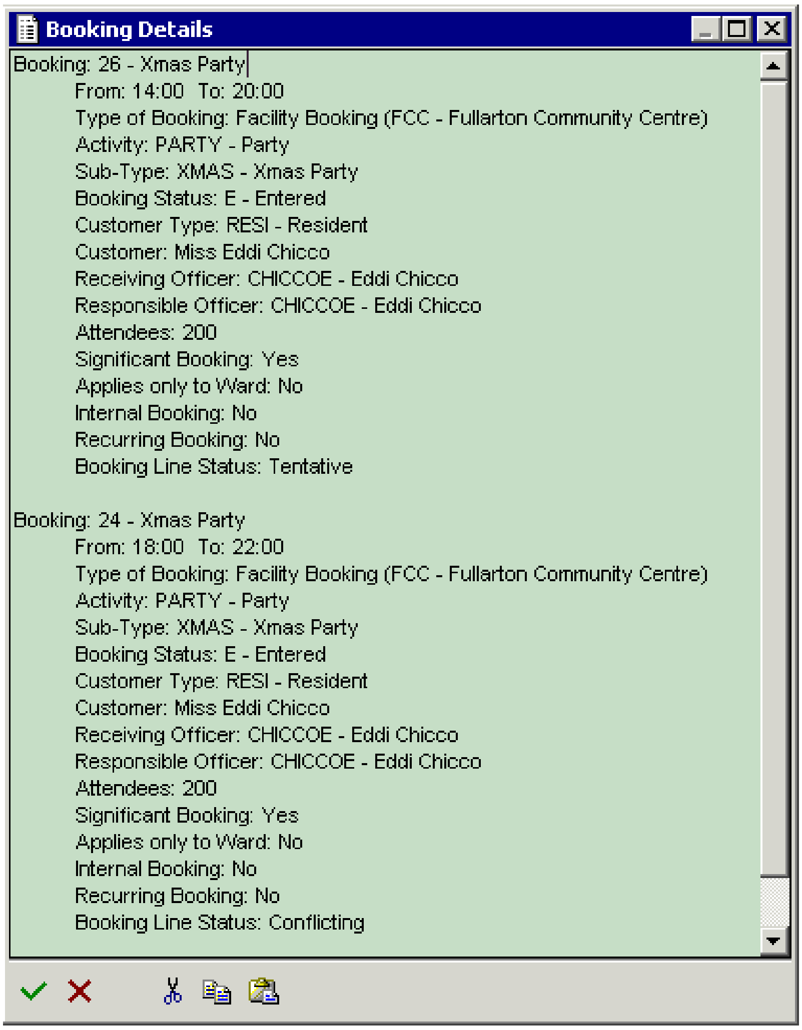
- If no Booking exists for that Time Block then a new Booking will be created with details such as the Date/Time and Facility (if known) already entered in a Booking Line.
- If a Booking exists for that time Block then double-clicking on the Time Block will perform the 'Modify' function and display the Booking Request for viewing or modification.

'Multi-Selection' of Time Blocks is also available. Because the Calendar is displayed as a grid of occurrences then selection of Time Blocks works 'Down' or 'Up' the columns. Using SHIFT+Click will select occurrences inclusively from the first click to the occurrence just clicked on. CTRL+Click will append additional individual selections.

Note: If a Facility has certain unavailable Booking Times and a Booking is made which starts or ends in an unavailable time slot but most of the Booking occurs in an available time slot, then the Booking will be valid. However, if an *entire* Booking is made in an unavailable time slot, then an error message will display and the Booking will be set to ‘Conflicting’ and will not be able to proceed.

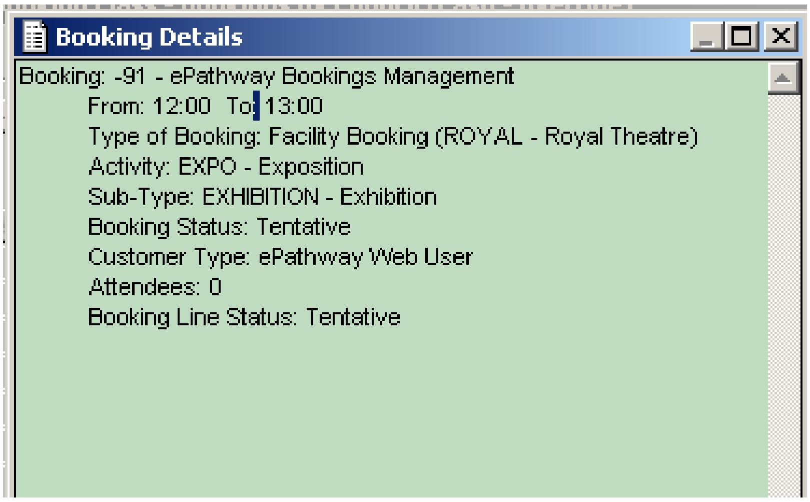
Booking Details

The ‘Booking Details' summary box is an information field which displays summary information about the Booking(s) in the currently highlighted time block. Double-clicking or pressing F2 in the field will zoom in to display the full details of the field. If more than one Booking is occupying a time slot, then details of both Bookings will display in this field, e.g.



This field also displays tentative Booking details when a Booking is made through ePathway. Booking Lines are created by ePathway users and exist from the time an ePathway user selects a Facility they wish to book up until the time the Booking is confirmed by the user or the timeout period has expired.

Temporary booking lines are colour coded as ‘Tentative’ bookings, and have negative booking numbers.

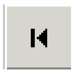


Navigation Buttons
A set of navigation buttons and fields have been included to allow the user to move the Calendar display. This includes moving backwards or forwards by one Day or a user definable number of Days, repositioning a particular Day as the first Day on the Calendar display or resetting the Calendar back to its original starting Date.

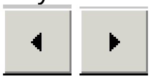
The Day/Date button shows the original start Date that you selected when entering the form. Clicking on this button will reset the Calendar back to this Date.

The Date field allows you to enter a new starting Date for the Calendar. Double-clicking or pressing F2 in this field displays the Calendar where a date may be selected. Alternatively, a date may be keyed in in the usual date format e.g. 041104 or 04/11/04 etc.

The 'Increment Days' field allows you to specify how many days the Navigation buttons will actually move the Calendar by.

 This button will move the Calendar back by the number of days specified in the Increment Days field. The default being 7 Days (a Week).

 This button will move the Calendar forward by the number of days specified in the Increment Days field. The default being 7 Days (a Week).

 These buttons will move the Calendar backwards or forwards by 1 Day, i.e. Previous Day and Next Day.

Hovering the mouse cursor over these buttons will display some 'Tool Tip' text describing their function.

Note: The TAB sequence through the Navigation fields will place focus on each field except the 'Reset Start Date' button - 

. (This is intentional).

Legend
At the very bottom of the form is a Legend describing the colours used on the Calendar. These colours are user-definable via the standard Pathway System Administration Menu Option. [System Administration>>System Parameters>>Video Attribute Colour Maintenance].

The default colours are as shown below:

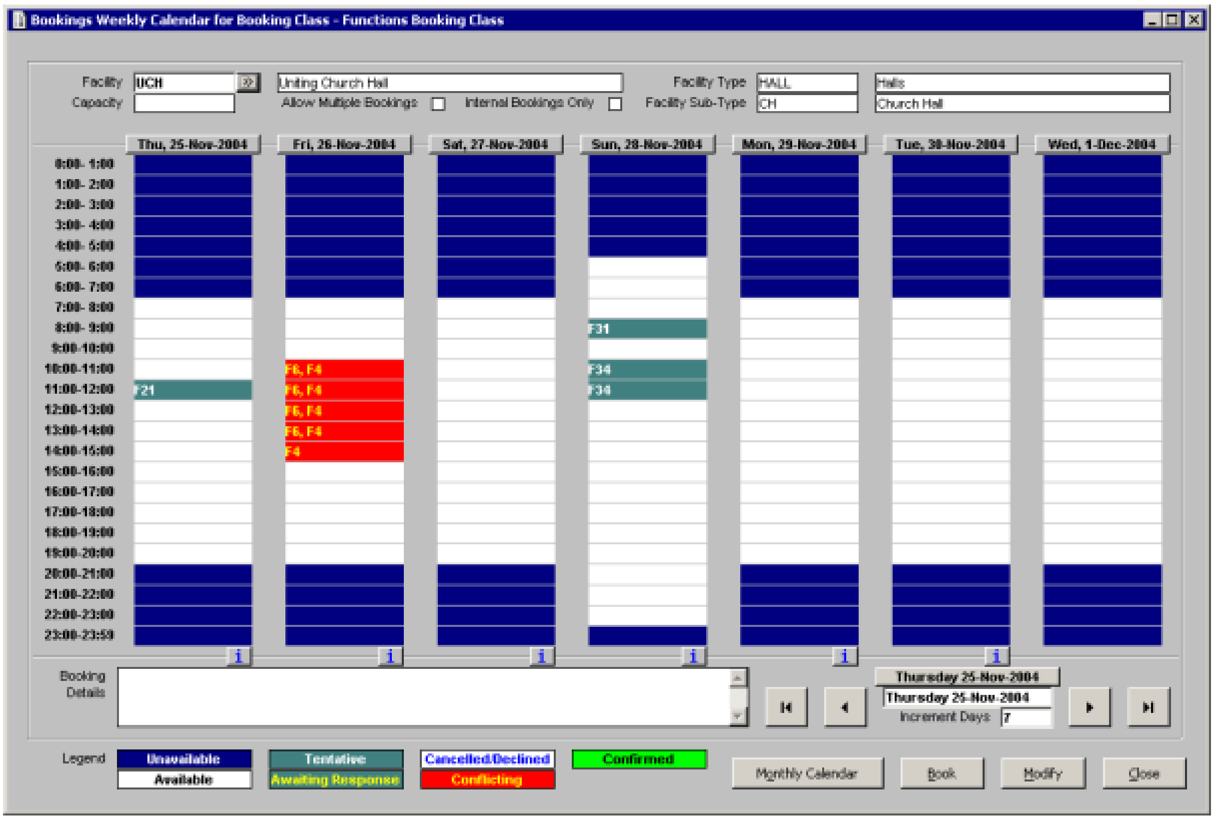
Note: If a Booking Line Status is set to (default), then the Booking Status value will be used.

The order of priority for the display of Status colours is as follows:

1. Available
2. Cancelled/Declined
3. Tentative
4. Awaiting
5. Confirmed
6. Unavailable
7. Conflicting

Note: When more than 1 Booking occupies a Time Block, the Status with the higher number will be the one whose colours displays on the Calendar.

If a Facility is only available for booking between certain hours then the Calendar View may look something like the following:



Weekly Calendar View showing periods where the Facility is unavailable for booking

Monthly Calendar Button

Selecting the Monthly Calendar Button allows the user to switch to the Monthly Calendar View.

Book Button

The Book Button allows the user to pass the details of selected Time Blocks through to Booking Entry to create a new Booking.

Modify Button

The Modify Button allows the user to go to Booking Entry and modify the details of the selected Booking. If time blocks are 'multi-selected', and there are multiple Bookings within the selection, then the standard Booking Selection form will display to allow the selection of specific Bookings to modify. (Note that in Enquiry Mode the 'Modify' button will be 'Display').

Facility Weekly Calendar form

Note: This is an authorised function. This means that the functionality will only be available if you are authorised to use it. If customers do not have this option and require the functionality then it is advisable that they contact their account manager to organise the purchase of this function.

The Facility Weekly Calendar displays when the Weekly Calendar Button is selected on the Bookings Search Profile, provided the Council has the authorisation to use it, and the parameters are set up.

This Calendar view provides a list of all Facilities and Sub-Facilities on the left hand side in expanded format. A scroll bar is provided where the view of all Facilities cannot fit onto the screen. Legend colours (similar to the Bookings Calendars) provide information on the status of Bookings at a glance. Weekends and Public Holidays are identified by a different colour and are controlled by the Calendar in use by the Bookings module.

In the Weekly Calendar view each day is broken down into 4 six-hour blocks, and consequently, due to limited space for identifying the time components, the times may need to be changed on the Booking once it has been created.

Where the Calendar indicates that there is a Booking, placing focus on the time slot will display the Booking Details. This will contain basic details about the booking such as the Booking Number, Status, Activity Type, Booking dates and Activity Name.

Clicking on a booking on the Calendar and clicking the Modify button displays the Booking in Maintenance mode or Enquiry mode (depending on which Menu Option the Calendar was accessed from).

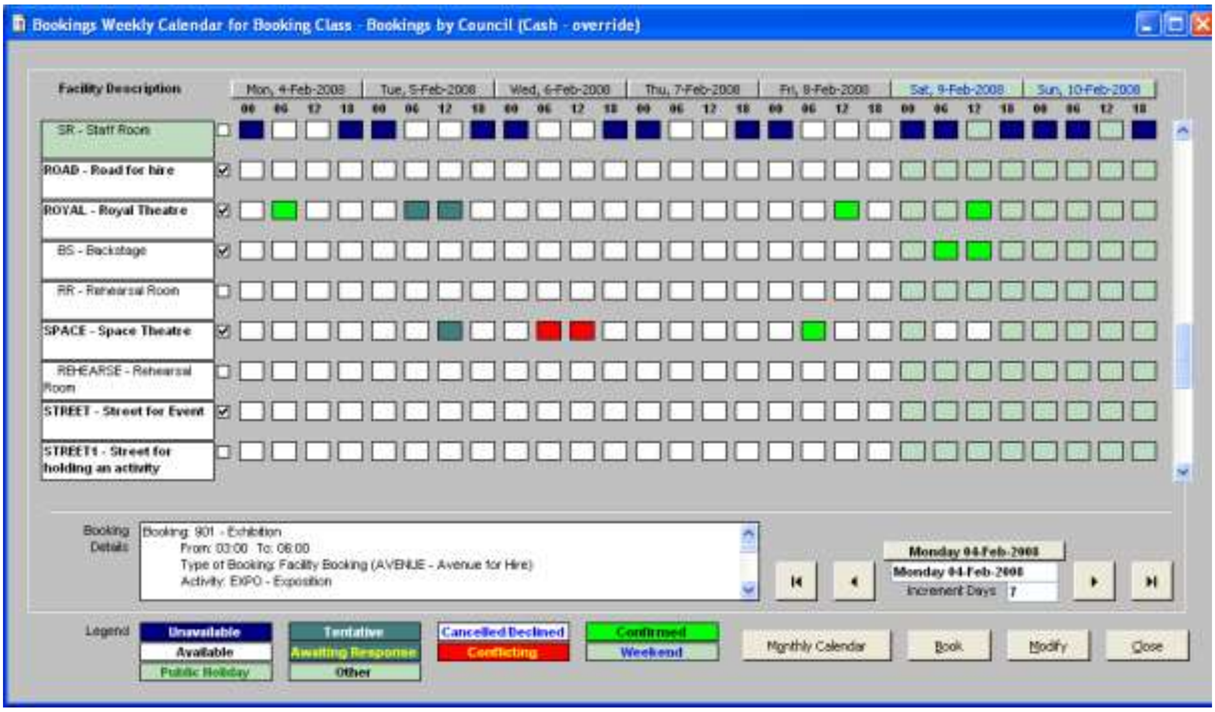
Where the Calendar indicates that the Facility in not booked, the user is able to highlight as many days and time ranges as required using the CTL and SHFT functions and Click 'Book' or use the Double-Click Function. This will create a Booking Request and automatically insert the Booking lines that were selected.

The view displayed here is achieved if no Facility details are selected in the Search Profile. In this case the calendar will display all facilities grouped by Parent Facility, then Sub-Facility.

A Checkbox glyph positioned alongside the Facility indicates where a displayed Facility allows Multiple Bookings. (Note that due to space restrictions there is no Label Heading for this check box, but if the user hovers their mouse over this check box field a Tool Tip description, "Allow Multiple Bookings" will be shown.)

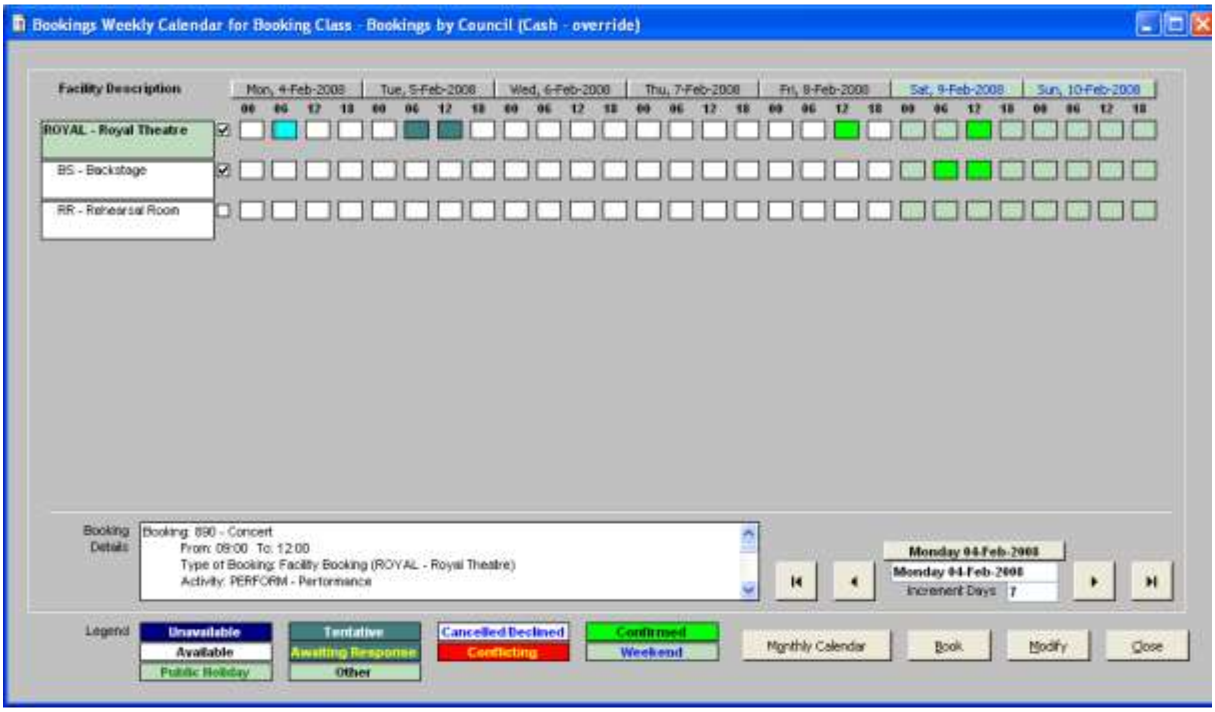
Note: A change has been made such that when the date period is altered the system will by default remain focused on the previously selected Facility instead of automatically jumping to the first active booking on the new date range.

A new "Focus on first active Booking" checkbox has been added to the date controls to allow original functionality (ie. automatically changing selection) for users who preferred the old method. When this is checked on, the forms will behave as before.



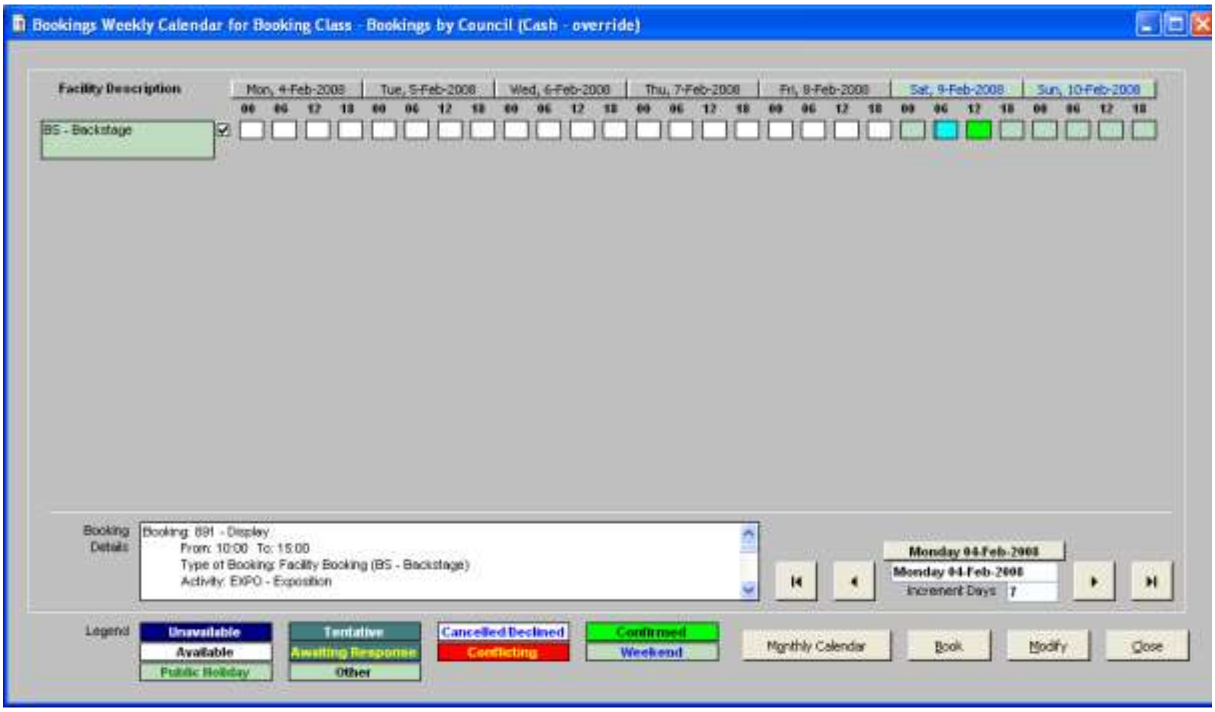
Facility Weekly Calendar showing all facilities and Sub-facilities

The view displayed below is achieved when a Parent Facility is entered into the Search Profile. The calendar displays the Parent Facility as well as its Sub-Facilities.



Facility Weekly Calendar showing a Parent Facility and its Sub-Facilities

The view displayed below is achieved when a Sub-Facility is entered into the search Profile. The calendar will display the Sub-Facility only.



Facility Weekly Calendar showing a Sub-Facility

Similar to the Bookings Weekly Calendar, the Facility Weekly Calendar allows the user to select one or multi-select available time slots for adding to a Booking Request. It allows new bookings to be created and the maintenance of existing bookings.

When the Weekly Calendar is accessed, focus will be on the first Booking. If there are no bookings on the weekly display, then focus will be on the first time slot.

Facility Description

This panel shows the Facility Description with the Parent Facilities being bolded. If no Facility is entered in the Search Profile, then all Facilities and their associated Sub-Facilities display in this panel. If a Parent Facility is entered in the Search Profile, then it will display along with any Sub-Facilities that are associated with it. If a Sub-Facility is entered into the Search Profile, then the Sub-Facility alone will display in this panel.

Upon entry to the Weekly Calendar, focus will be on the first Booking Time slot. If there are no bookings displayed for the week that is displayed, then focus will be on the first Facility Description and the first Time slot.

Allow Multiple Bookings

This flag will be checked ON where a displayed Facility allows ‘Multiple Bookings’.

Calendar Time Blocks

The Time Blocks are represented by white squares with 4 available for each day. They each represent a 6 hour block of time.

Each Day has a heading button that details the Day and Date. Clicking on this button will move that Day to the beginning of the Calendar. Weekend days and Public Holidays are identified according to the legend if they have been set up in the Calendar for the module.

Each Time Block will be coloured based on the Status of the Booking(s) within that time block (according to the Legend). A ‘Conflicting’ Status will always override any other Status.

Navigating the Calendar Time Blocks is simple. The Tab key will move the focus horizontally through the days. When the end of a row is reached the cursor will move to the next row. Moving up or down is achieved by using the Up/Down arrow keys.

Double-clicking on a Time Block will perform one of the following functions:

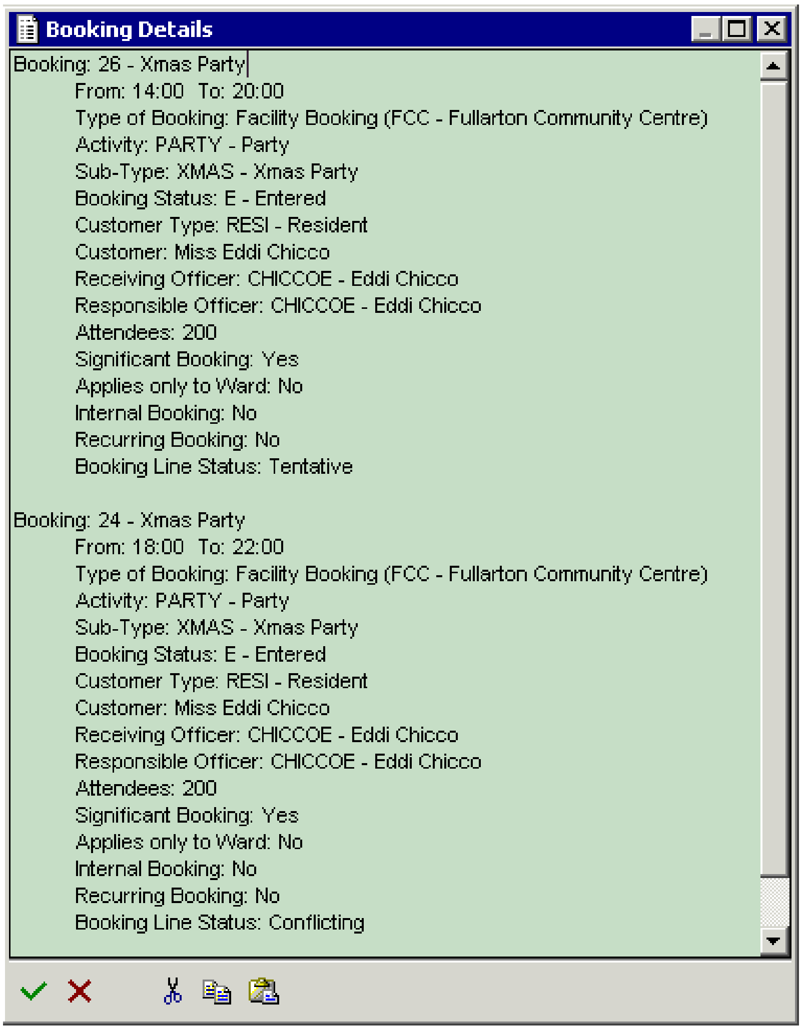
- If no Booking exists for that Time Block then a new Booking will be created with details such as the Date/Time and Facility already entered in a Booking Line.
- If a Booking exists for that time Block then double-clicking on the Time Block will perform the 'Modify' function and display the Booking Request for viewing or modification.
- If the Facility is open only part of the time block, then a message will display indicating this to inform the user that the hours may need to be checked.

'Multi-Selection' of Time Blocks is also available. Because the Calendar is displayed as a grid of occurrences then selection of Time Blocks works 'Across' the columns. Using SHIFT+Click will select occurrences inclusively from the first click to the occurrence just clicked on. CTRL+Click will append additional individual selections.

Note: If a Facility has certain unavailable Booking Times and a Booking is made which starts or ends in an unavailable time slot but most of the Booking occurs in an available time slot, then the Booking will be valid. However, if an *entire* Booking is made in an unavailable time slot, then an error message will display and the Booking will be set to 'Conflicting' and will not be able to proceed.

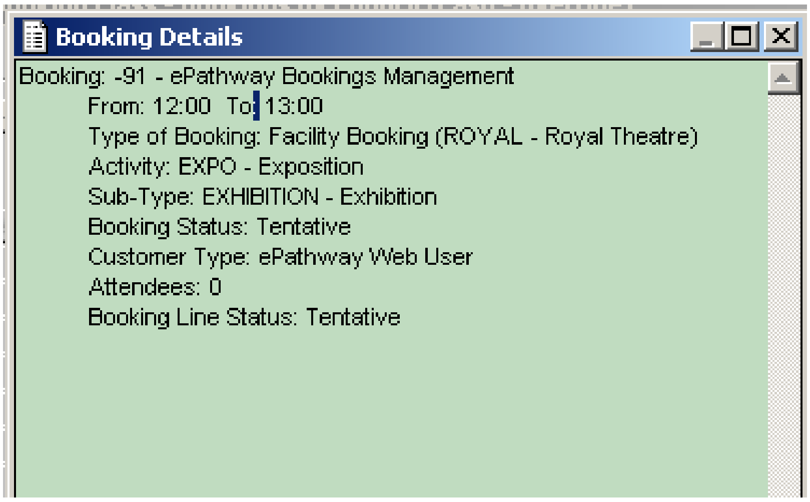
Booking Details

The 'Booking Details' summary box is an information field which displays summary information about the Booking(s) in the currently highlighted time block. Double-clicking or pressing F2 in the field will zoom in to display the full details of the field. If more than one Booking is occupying a time slot, then details of both Bookings will display in this field, e.g.



This field also displays tentative Booking details when a Booking is made through ePathway. Booking Lines are created by ePathway users and exist from the time an ePathway user selects a Facility they wish to book up until the time the Booking is confirmed by the user or the timeout period has expired.

Temporary booking lines are colour coded as 'Tentative' bookings, and have negative booking numbers.



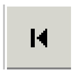
Navigation Buttons

A set of navigation buttons and fields have been included to allow the user to move the Calendar display. This includes moving backwards or forwards by one Day or a user definable number of Days, repositioning a particular Day as the first Day on the Calendar display or resetting the Calendar back to its original starting Date.

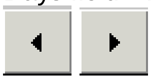
The Day/Date button shows the original start Date that you selected when entering the form. Clicking on this button will reset the Calendar back to this Date.

The Date field allows you to enter a new starting Date for the Calendar. Double-clicking or pressing F2 in this field displays the Calendar where a date may be selected. Alternatively, a date may be keyed in in the usual date format e.g. 041104 or 04/11/04 etc.

The 'Increment Days' field allows you to specify how many days the Navigation buttons will actually move the Calendar by.

 This button will move the Calendar back by the number of days specified in the Increment Days field. The default being 7 Days (a Week).

 This button will move the Calendar forward by the number of days specified in the Increment Days field. The default being 7 Days (a Week).

 These buttons will move the Calendar backwards or forwards by 1 Day, i.e. Previous Day and Next Day.

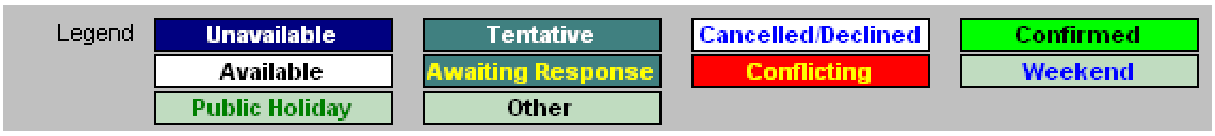
Hovering the mouse cursor over these buttons will display some 'Tool Tip' text describing their function.

Note: The TAB sequence through the Navigation fields will place focus on each field except the 'Reset Start Date' button - Thursday 25-Nov-2004. (This is intentional).

Legend

At the very bottom of the form is a Legend describing the colours used on the Calendar. These colours are user-definable via the standard Pathway System Administration Menu Option. [System Administration>>System Parameters>>Video Attribute Colour Maintenance].

The default colours are as shown below:



Note: If a Booking Line Status is set to (default), then the Booking Status value will be used.

The order of priority for the display of Status colours is as follows:

8. Available
9. Cancelled/Declined
10. Tentative
11. Awaiting
12. Confirmed
13. Unavailable
14. Conflicting

Note: When more than 1 Booking occupies a Time Block, the Status with the higher number will be the one whose colours displays on the Calendar.

Monthly Calendar Button
Selecting the Monthly Calendar Button allows the user to switch to the Monthly Calendar View.

Bookings Monthly Calendar Form

The Monthly Calendar will display all 'valid' Bookings within a selected Month. This excludes any Bookings that have been 'Cancelled' or 'Declined'.

The Bookings can be displayed for a specific Facility or all Bookings for all Facilities for the current Booking Class can be shown. When Bookings are displayed for a particular Facility the Booking Numbers will be prefixed with a character to identify the type of Booking, e.g. "F" (Facility Booking), "S" (Related Sub-Facility Booking) or "P" (Related Parent Facility Booking). However, when all Bookings are being displayed then only the Booking Number is shown.

The Monthly Calendar view is accessed by clicking the Monthly Calendar button on the Bookings Search Profile. Alternatively it can be accessed from the Weekly Calendar. In this scenario the current Date and Facility will be passed to the Monthly Calendar. Any other Search Profile data specified will also be used by the Monthly Calendar.

If a search profile is used for displaying the Monthly Calendar, the following text will display at the top of the Calendar to indicate this: "Search Profile criteria have been applied".

Note: References to the Weekly Calendar will only display if the Weekly Calendar Authorised Function has been made available.

The Search Profile can be used to filter records before accessing the Monthly Calendar:

- The Booking Date/Time profile field allows the user to specify the starting Date for the Calendar, however, only the 'From' Date and Time is used. The 'To' Date and Time value will be ignored. If nothing is entered, then the Calendar assumes 'Today' as the starting Date.

- If a Booking Number or a Booking Number Range is entered on the Search Profile, the Calendar only show those bookings but the Calendar will open to the Month start (based on Today's Date or the 'From' Date if populated on the Search Profile). Unlike the normal Search process where a single Booking Number entry will take you directly to that Booking, regardless of the other search profile values, the Calendar forms will ALWAYS subset any search profile data within the Month of the starting Date.

- The Monthly Calendar is designed to work with ALL Bookings for a Month. You can also filter the Facility bookings by populating the Facility field on the Search Profile screen or via the Facility filter once in the Calendar.

Features of the Monthly Calendar
The Monthly Calendar has the following features and provides the following functionality:

- ❑ The ability to select a different Facility for the displayed Month is provided using a Facility popup in the top frame of the form.

- ❑ If a Facility is selected, the top frame of the form will display useful details about the Facility.

- ❑ The body of the form displays the Calendar itself. This is represented as a grid of 35 Days divided into 4 six hour time blocks. The grid is displayed with 7 items across, which represent the 7 Days of the Week starting on a Monday. The Calendar will be displayed such that the 'First' of the month occurs on its 'Day'. Any days to the left of the 'First' will be 'hidden' and not available. However, if the 'First' of the month occurs late in the week, then there may not be enough occurrences in the grid to represent every date of the month. In this case the last one or two days will be shown at the top of the Calendar. This mimics the way that we normally see a Monthly Calendar printed.

- ❑ Each valid Day has a heading button that details the Day number (Date) of that Day. Clicking on this button will 'select' every time block within the day and then call Booking Entry to 'Modify' the Bookings found on that Day.

- ❑ Each time block will be coloured based on whether there are any Bookings or not in that 6 hour time period.

- ❑ Each time block, where there are Bookings, will display a simple list of the Booking Number(s) within that time block. Where there is no specific Facility chosen, this will be just a list of the Booking Number(s). However, where a Facility has been specified, the Booking Number(s) will be prefixed with a character to identify the type of Facility Booking:

    - "F" for Facility Bookings

    - "P" for Parent Facility Bookings (where the currently displayed Facility is an 'Autobook' Sub-Facility)

    - "S" for Sub-Facility Booking (where the Booking is for another Sub-Facility of the same Parent Facility).

- ❑ Each valid Day can have a second heading button displayed. This is the 'Information' button  and will be shown if there are any 'Related' Bookings or Activities occurring throughout that Day or where Bookings occur for a Facility that allows 'Multiple Bookings'.. Clicking on this button will take the user to the standard 'Related Bookings Enquiry' form. This button will also display on any day where a Booking exists for a Facility that allows Multiple Bookings.

- ❑ The bottom frame of the form contains a 'Booking Details' summary information field which will contain summary data about the Booking(s) in the time block which has focus.

- Next to the Booking Detail field are a set of navigation buttons and fields that allow the user to move the Calendar display.

- There is a Month button that shows the original start Date Month that was selected when entering the form. Clicking on this button will reset the Calendar back to this Month.

- There is a 'Month' dropdown field and a 'Year' field. The 'Month' field allows the user to enter a new Month for the Calendar display. The 'Year' field allows the user to specify a different Year.

- The two navigation buttons provide the following functions: 'Previous-Month' and 'Next-Month'. If the mouse cursor is hovered over these buttons some 'Tool Tip' text will display describing their function.

- At the very bottom of the form is a Legend describing the colour of the 'Bookings Exist' status used on the Calendar. This colour, and the 'No Bookings Exist' colour which is not shown in the Legend, are user definable via the standard Pathway System Administration Menu Option.

- At the bottom of the form is a 'Weekly Calendar button, to allow the user to switch to the Weekly Calendar View.

- The 'Book' button allows the user to pass the details of selected Time Blocks through to Booking Entry in order to create a new Booking.

- The ‘Modify' button allows the user to go to Booking Entry and modify the details of the selected Booking(s). If time blocks are multi-selected, and there are multiple Bookings within the selection, then the standard Booking Selection form will be shown in order to further select which Booking is to be modified. (Note that in Enquiry Mode the 'Modify' button will be shown as 'Display').

Navigating through the Calendar

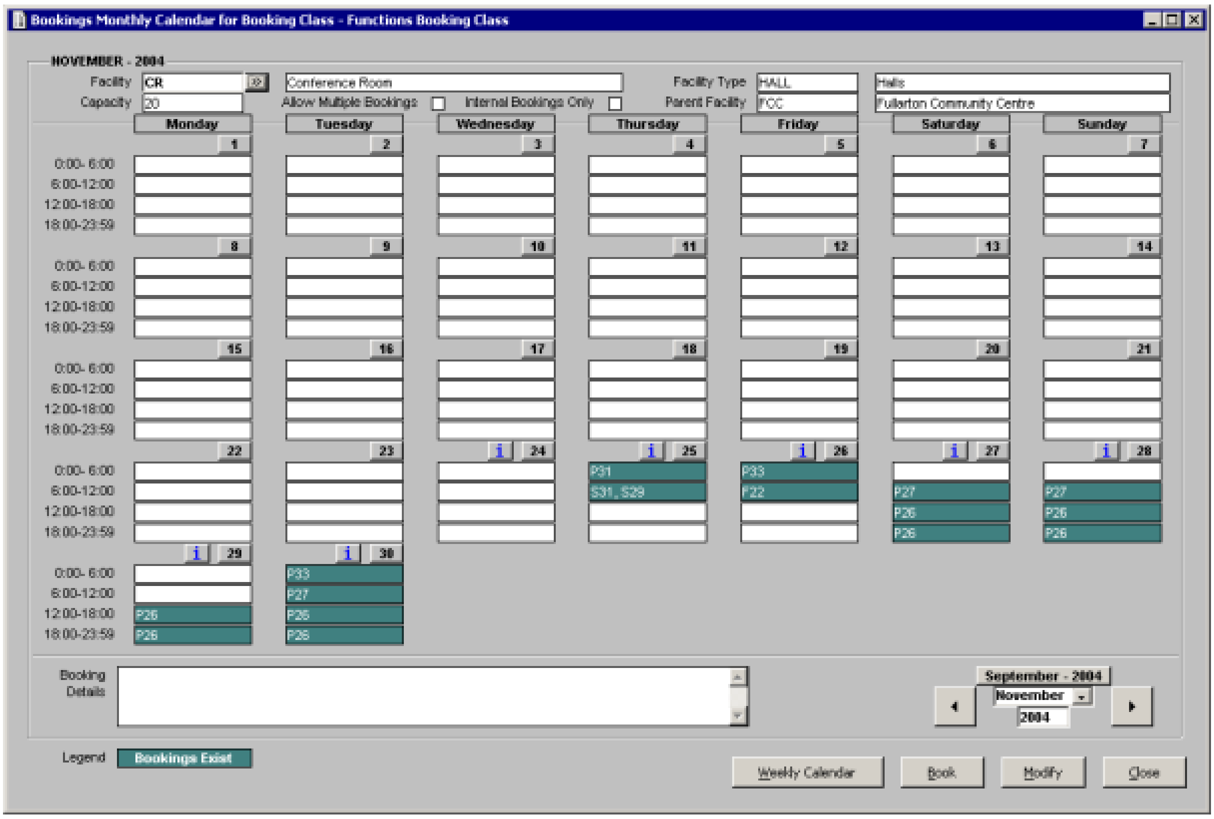
- The Calendar forms use a specialised keyboard definition to help you navigate around the form. When focus is within the body of the Calendar the Cursor-Up and Cursor-Down keys will move you one occurrence up or down the Day column. When you reach the top or bottom of a column, then focus will move to the bottom or top of the next/previous column. The TAB key will move you one occurrence to the right through the Calendar. When you reach the 'End' of the Calendar then focus will jump out of the Calendar to the fields at the bottom of the form. The TAB sequence here will tab through all the fields but does miss the 'Reset Start Date' button, this is intentional. When you TAB out of the 'Close' button, focus will jump to the 'Facility Code' field at the top of the form. Eventually you will tab back into the body of the Calendar. the BACK-TAB works in the reverse way.

- Double Clicking on a time block will perform the usual 'Modify' processing for the Booking(s) in the time block.

- The Calendar supports 'Multi-Selection'. The way that the displayed time blocks (occurrences) are selected is special for this form. Because the Calendar is displayed as a grid of occurrences the selection will work 'Across' the columns, rather than ‘Up' and ‘Down’ which is the standard way that we would process the occurrences (as in the Weekly Calendar). So, if you use SHIFT+Click you should get occurrences selected from where you last Single-Clicked to the occurrence that you just clicked on. CRTL+Click will 'Append' additional selections in the normal way.

Note: As of Release 3.05 a change has been made such that when the date period is altered the system will by default remain focused on the previously selected Facility instead of automatically jumping to the first active booking on the new date range.

A new "Focus on first active Booking" checkbox has been added to the date controls to allow original functionality (ie. automatically changing selection) for users who preferred the old method. When this is checked on, the forms will behave as before.



Bookings Monthly Calendar form

Facility Details

The Facility field and pop up in the top frame of the form allow the user to select or change the Facility for the displayed Month. This may be left blank to show all Facilities. If a Facility is selected, the top frame of the form will display useful details about the Facility including the following:

- Facility Name and Description
- Facility Type
- Parent Facility
- Capacity
- Allow Multiple Booking indicator
- Internal Bookings Only indicator

Calendar Day Time Blocks

The body of the form displays the Calendar itself. This is represented as a grid of 35 Days divided into 4 six hour time blocks. The grid is displayed with 7 items across, which represent the 7 Days of the Week starting on a Monday. The Calendar will be displayed such that the 'First' of the month occurs on its 'Day'. Any days to the left of the 'First' will be 'hidden' and not available. However, if the 'First' of the month occurs late in the week, then there may not be enough occurrences in the grid to represent every date of the month. In this case the last one or two days will be shown at the top of the Calendar. This mimics the way that we normally see a Monthly Calendar printed.

Each valid Day has a heading button that details the Day number (Date) of that Day. Clicking on this button will 'select' every time block within the day and then call Booking Entry to 'Modify' the Bookings found on that Day.

Each time block will be coloured based on whether there are any Bookings or not in that 6 hour time period.

Each time block, where there are Bookings, will display a simple list of the Booking Number(s) within that time block. Where there is no specific Facility chosen, this will be just a list of the Booking Number(s). However, where a Facility has been specified, the Booking Number(s) will be prefixed with a character to identify the type of Facility Booking as follows:

- "F" for Facility Bookings
- "P" for Parent Facility Bookings (where the currently displayed Facility is an 'Autobook' Sub-Facility)
- "S" for Sub-Facility Booking (where the Booking is for another Sub-Facility of the same Parent Facility).

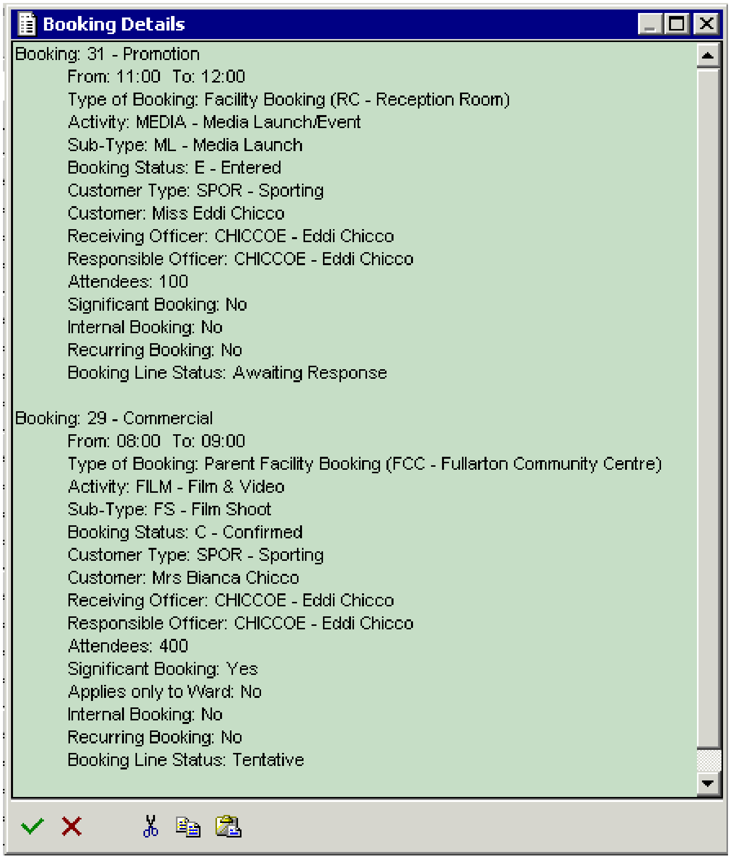
Each valid Day can have a second heading button displayed. This is the 'Information' button  and will be shown if there are any 'Related' Bookings or Activities occurring throughout that Day that may impact on the Booking. Clicking on this button will take the user to the standard Related Bookings Enquiry form.

The Calendar Day Time Blocks can be multi-selected using the mouse and the keyboard. These selections can then be passed to Booking Entry by using the ‘Book’ button to create a new Booking.. Where the selections include existing Bookings, the ‘Modify’ button may be used to access those Bookings.

Each ‘Day’ button allows all Bookings within that day to be modified or displayed. This is equivalent to selecting the four time blocks for the Day and clicking the ‘Modify’ button.

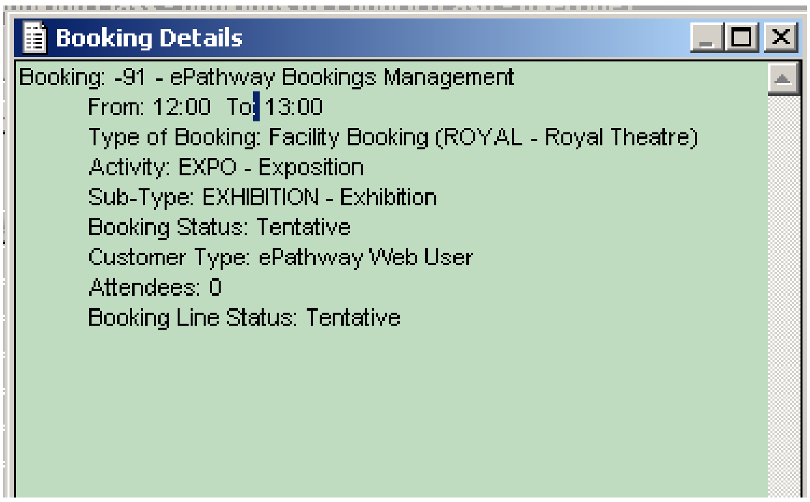
Booking Details

The ‘Booking Details' summary box is an information field which displays summary information about the Booking(s) in the currently highlighted time block. Double-clicking or pressing F2 in the field will zoom in to display the full details of the field. If more than one Booking is occupying a time slot, then details of both Bookings will display in this field, e.g.



This field also displays tentative Booking details when a Booking is made through ePathway. Booking Lines are created by ePathway users and exist from the time an ePathway user selects a Facility they wish to book up until the time the Booking is confirmed by the user or the timeout period has expired.

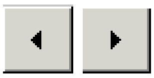
Temporary booking lines are colour coded as ‘Tentative’ bookings, and have negative booking numbers.



Navigation Buttons
A set of navigation buttons and fields, as shown below, have been included to allow the user to move the Calendar display.

There is a Month button that shows the original start Date Month that was selected when entering the form. Clicking on this button will reset the Calendar back to this Month.

There is a 'Month' dropdown field and a 'Year' field. The 'Month' field allows the user to enter a new Month for the Calendar display. The 'Year' field allows the user to specify a different Year.

 The two navigation buttons provide the following functions: 'Previous-Month' and 'Next-Month'. These buttons will move the Calendar backwards or forwards by 1 Month. If a Month and Year are selected/keyed in, then pressing one of the Navigation buttons will move the Calendar to the specified Month and Year.

If the mouse cursor is hovered over these buttons some 'Tool Tip' text will display describing their function.

Note: The TAB sequence through the Navigation fields will place focus on each field except the 'Reset Start Month' button - 

. (This is intentional).

Legend
Each six-hour time block is coloured to indicate the existence of Bookings within that time. The Monthly Calendar only indicates when Bookings occur. The status of Bookings and the available times of Facilities are not represented graphically on this Calendar.

At the very bottom of the form is a Legend describing the colour of the 'Bookings Exist' status used on the Calendar. This colour, and the 'No Bookings Exist' colour which is not shown in the Legend, are user definable via the standard Pathway System Administration Menu Option.

The default colour is shown below:

Weekly Calendar Button
Selecting the Weekly Calendar Button allows the user to switch to the Weekly Calendar View.

Note: Where the Weekly Calendar is not available (Authority is required for this function), the Weekly Calendar Button will not be shown. In this situation the only available Calendar will be the Monthly view.

Book Button
The Book Button allows the user to pass the details of selected Time Blocks through to Booking Entry to create a new Booking.

Modify Button
The Modify Button allows the user to go to Booking Entry and modify the details of the selected Booking. If time blocks are 'multi-selected', and there are multiple Bookings within the selection, then the standard Booking Selection form will display to allow the selection of specific Bookings to modify. (Note that in Enquiry Mode the 'Modify' button will be 'Display').

Facility Monthly Calendar Form

Note: This is an authorised function. This means that the functionality will only be available if you are authorised to use it. If customers do not have this option and require the functionality then it is advisable that they contact their account manager to organise the purchase of this function.

This alternative view of the Monthly Calendar provides a list of all Facilities and Sub-Facilities, displayed in expanded format, on the left hand side of the Calendar. A scroll bar allows viewing of any Facilities not possible in the initial view.

Legend colours based on the Status of a Booking are similar to the Bookings Monthly Calendar view, and Weekends and Public holidays are identified by a different colour.

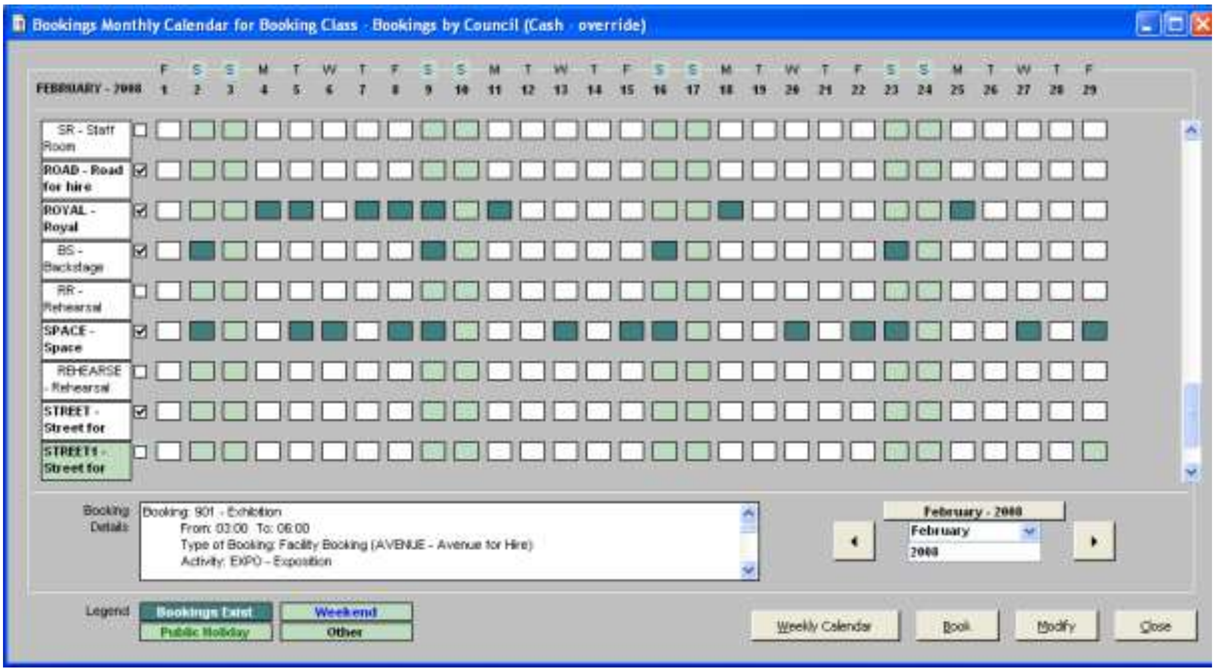
Where the Calendar indicates that there is a Booking, placing focus on the time slot will display the Booking Details. This will contain basic details about the booking such as the Booking Number, Status, Activity Type, Booking dates and Activity Name.

Clicking on a booking on the Calendar and clicking the Modify button displays the Booking in Maintenance mode or Enquiry mode (depending on which Menu Option the Calendar was accessed from).

Where the Calendar indicates that the Facility in not booked, the user is able to highlight as many days and time ranges as required using the CTL and SHFT functions and Click 'Book' or use the Double-Click Function. This will create a Booking Request and automatically insert the Booking lines that were selected.

In the Facility Monthly Calendar each day is broken down into a small block, and consequently, due to limited space in being able to identify the time components, the times may need to be changed on the booking once it has been created.

A Checkbox glyph positioned alongside the Facility indicates where a displayed Facility allows Multiple Bookings. This will assist the user to identify those Facilities or Sub-Facilities that can have Multiple Bookings. This flag does not however indicate that there are other Bookings for the Facility. (Note that due to space restrictions there is no Label Heading for this check box, but if the user hovers their mouse cursor over this check box field a Tool Tip description, 'Allow Multiple bookings' will be shown.)



Facility Monthly Calendar

Facility Description

This panel shows the Facility Description with the Parent Facilities being bolded. If no Facility is entered in the Search Profile, then all Facilities and their associated Sub-Facilities display in this panel. If a Parent Facility is entered in the Search Profile, then it will display along with any Sub-Facilities that are associated with it. If a Sub-Facility is entered into the Search Profile, then the Sub-Facility alone will display in this panel.

Upon entry to the Facility Monthly Calendar, focus will be on the first Booking Time slot. If there are no bookings displayed for the week that is displayed, then focus will be on the first Facility Description and the first Time slot.

Allow Multiple Bookings
This flag will be checked ON where the displayed Facility allows 'Multiple Bookings'.

Calendar Day Time Blocks
The Time Blocks are represented by white squares with 1 available for each day. They each represent a 24 hour block of time.

Every day of the month is represented across the screen. Weekend days and Public Holidays are identified according to the legend if they have been set up in the Calendar for the module.

Each Day Block will be coloured based on the Status of the Booking(s) within that time block (according to the Legend).

Navigating the Calendar Days is simple. The Tab key will move the focus horizontally through the days. When the end of a row is reached the cursor will move to the next row. Moving up or down is achieved by using the Up/Down arrow keys.

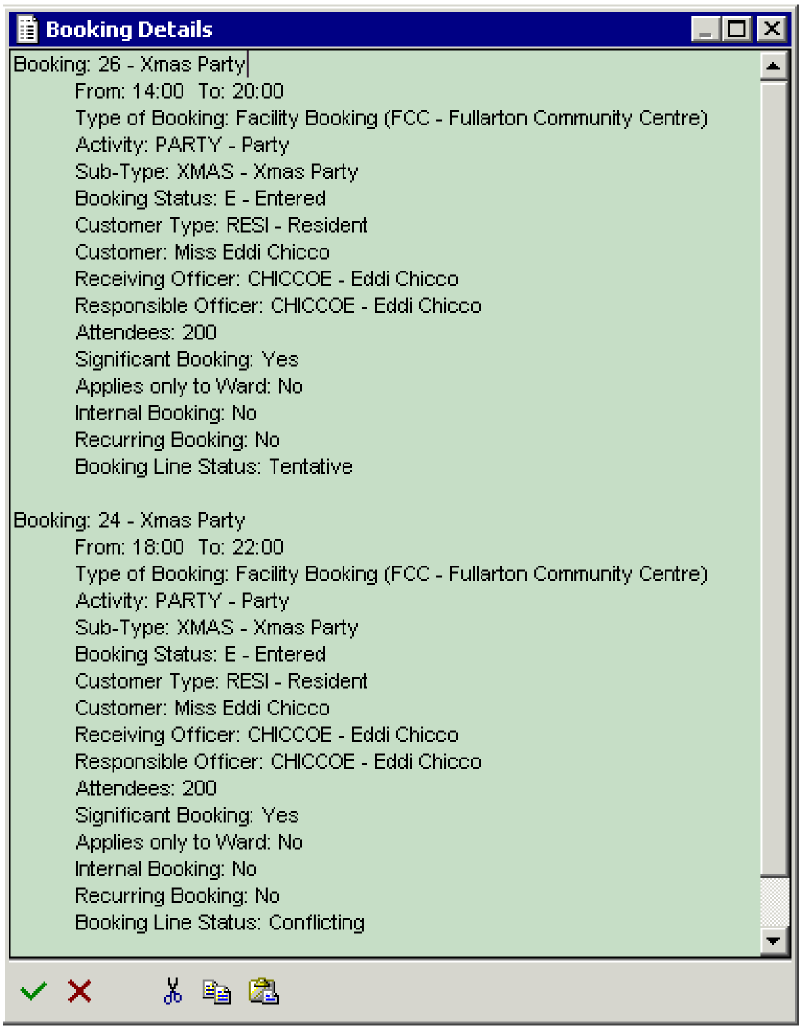
Double-clicking on a Day block will perform one of the following functions:

- If no Booking exists for that Day Block then a new Booking will be created with details such as the Date and Facility already entered in a Booking Line. The Time Range will not be populated.
- If a Booking exists for that Day then double-clicking on the Day Block will perform the 'Modify' function and display the Booking Request for viewing or modification.
- If the Facility is open only part of the Day, then a message will display indicating this to inform the user that the hours may need to be checked.

'Multi-Selection' of Days is also available. Because the Calendar is displayed as a grid of occurrences then selection of Day Blocks works 'Across' the columns. Using SHIFT+Click will select occurrences inclusively from the first click to the occurrence just clicked on. CTRL+Click will append additional individual selections.

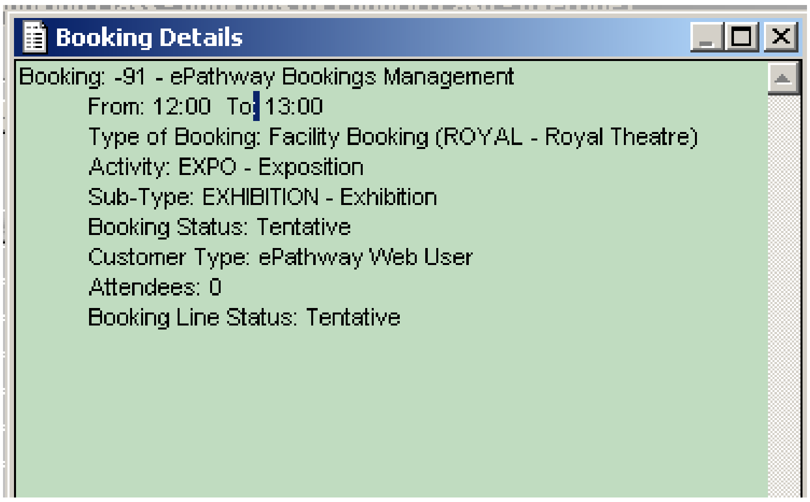
Note: If a Facility has certain unavailable Booking Times and a Booking is made which starts or ends in an unavailable time slot but most of the Booking occurs in an available time slot, then the Booking will be valid. However, if an *entire* Booking is made in an unavailable time slot, then an error message will display and the Booking will be set to 'Conflicting' and will not be able to proceed.

Booking Details
The 'Booking Details' summary box is an information field which displays summary information about the Booking(s) in the currently highlighted Day block. Double-clicking or pressing F2 in the field will zoom in to display the full details of the field. If more than one Booking is occupying a time slot, then details of both Bookings will display in this field, e.g.



This field also displays tentative Booking details when a Booking is made through ePathway. Booking Lines are created by ePathway users and exist from the time an ePathway user selects a Facility they wish to book up until the time the Booking is confirmed by the user or the timeout period has expired.

Temporary booking lines are colour coded as ‘Tentative’ bookings, and have negative booking numbers.

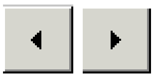


Navigation Buttons

A set of navigation buttons and fields, as shown below, have been included to allow the user to move the Calendar display.

There is a Month button that shows the original start Date Month that was selected when entering the form. Clicking on this button will reset the Calendar back to this Month.

There is a 'Month' dropdown field and a 'Year' field. The 'Month' field allows the user to enter a new Month for the Calendar display. The 'Year' field allows the user to specify a different Year.

 The two navigation buttons provide the following functions: 'Previous-Month' and 'Next-Month'. These buttons will move the Calendar backwards or forwards by 1 Month. If a Month and Year are selected/keyed in, then pressing one of the Navigation buttons will move the Calendar to the specified Month and Year.

If the mouse cursor is hovered over these buttons some 'Tool Tip' text will display describing their function.

Note: The TAB sequence through the Navigation fields will place focus on each field except the ‘Reset Start Month’ button - 

. (This is intentional).

Legend
Each Day block is coloured to indicate the existence of Bookings within that time. The Monthly Calendar only indicates when Bookings occur. The status of Bookings and the available times of Facilities are not represented graphically on this Calendar.

At the very bottom of the form is a Legend describing the colour of the 'Bookings Exist' status used on the Calendar. This colour, and the 'No Bookings Exist' colour which is not shown in the Legend, are user definable via the standard Pathway System Administration Menu Option.

In addition, background colours and text colours are used to identify Weekends and Public Holidays.

The default colour is shown below:

Weekly Calendar Button
Selecting the Weekly Calendar Button allows the user to switch to the Weekly Calendar View.

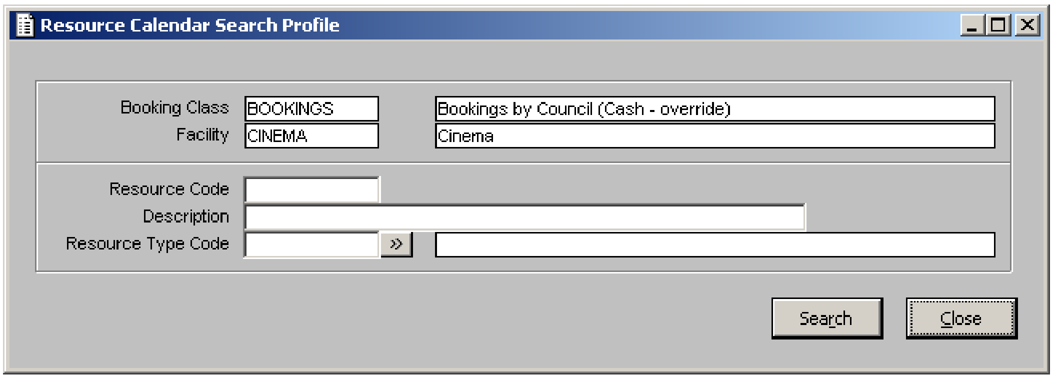
Note: Where the Weekly Calendar is not available (Authority is required for this function), the Weekly Calendar Button will not be shown. In this situation the only available Calendar will be the Monthly view.

Resource Calendar Search Profile Form

Note: This is an authorised function. This means that the functionality will only be available if you are authorised to use it. If customers do not have this option and require the functionality then it is advisable that they contact their account manager to organise the purchase of this function.

The Authorised function “Bookings Calendar Views For Facility and Resource” must be activated for access to this calendar. In addition, the ‘Facility Calendar Default’ flag in Booking Class Parameters Maintenance must be ON.

The Resource Calendar Search Profile allows the user to search for a Resource by Resource Code, Description and/or Type. Wildcard searching is permitted on the Code and Description.



Resource Calendar Search Profile

Booking Class/Facility
These fields display the selected Booking Class details as well as any Facility that was specified in the Booking Search Profile.

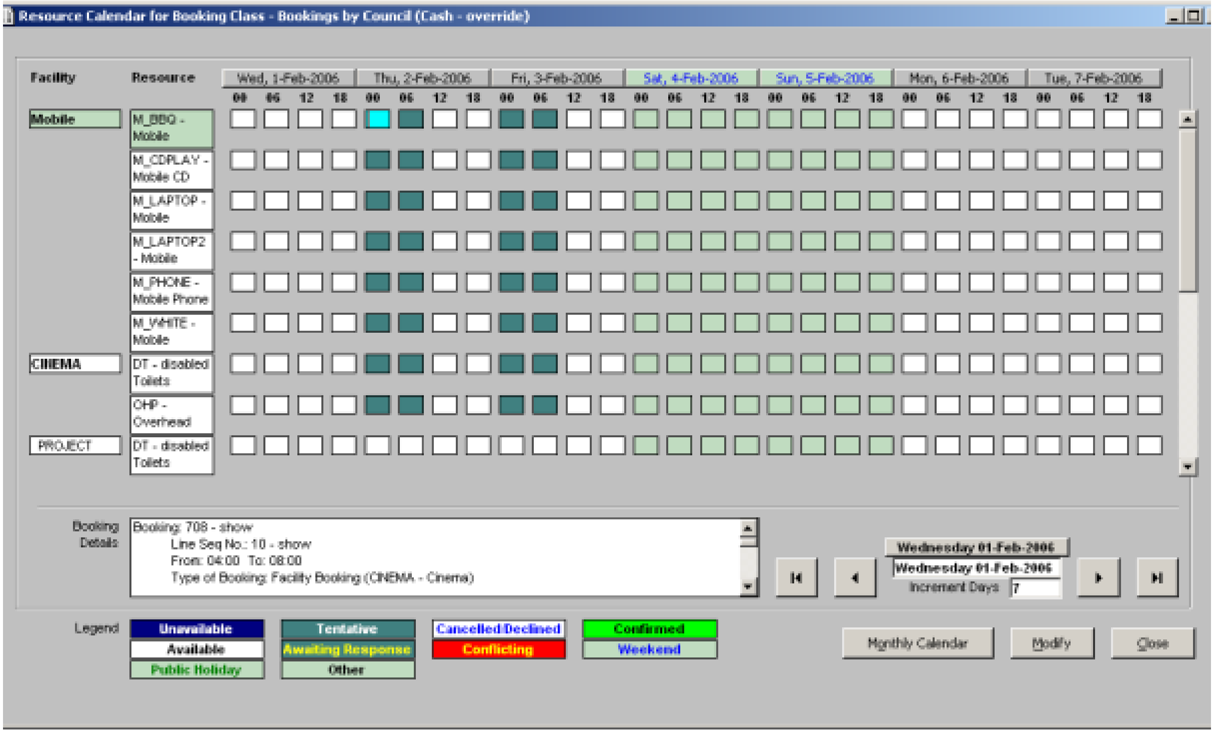
Resource Code/Description/Resource Code Type
These fields allow a Resource Code, Description and/or Resource Type Code to be entered as a search profile on which to perform a search. Wildcard searching is available on the Description and Code.

Resource Calendar Form

Note: This is an authorised function. This means that the functionality will only be available if you are authorised to use it. If customers do not have this option and require the functionality then it is advisable that they contact their account manager to organise the purchase of this function.

The Resource Calendar is a Weekly Calendar which displays all Resources for a Class and its Facilities. If a Resource has been booked, the time of the booking will be highlighted in the appropriate colour. If focus is placed on a time block, the booking details will display the bookings related to the Resource.

Note: The ‘Bookings Weekly Calendar’ authorised function must be checked ON in order to use this Calendar.



Resource Calendar

All Resources that fit the selection criteria will be displayed on this calendar and will include Mobile Resources.

As per the Facility Weekly and Monthly Calendars, if a Resource has been booked for that time, the field will be displayed in the appropriate colour to notify the user of this fact and the Booking Details panel will display the details of the Booking. If the user double-clicks (or F2) on the field they will be taken to the Booking Maintenance/Enquiry form for that Booking.

Note: this calendar does not allow Bookings to be made for Resources. It is merely used to keep track of where Resources are.

In Booking Entry, in the Resources allocation for a Booking Line, if the Resources has already been allocated to another Booking for that time, the user is prompted with a question asking if they wish to view the Details or the Calendar. If the Calendar option is selected, the Resource Calendar is displayed.

As this Calendar functions similarly to the Weekly Calendar, please refer to the section on Facility Weekly Calendar for more details.

Available Facility Search Profile Form

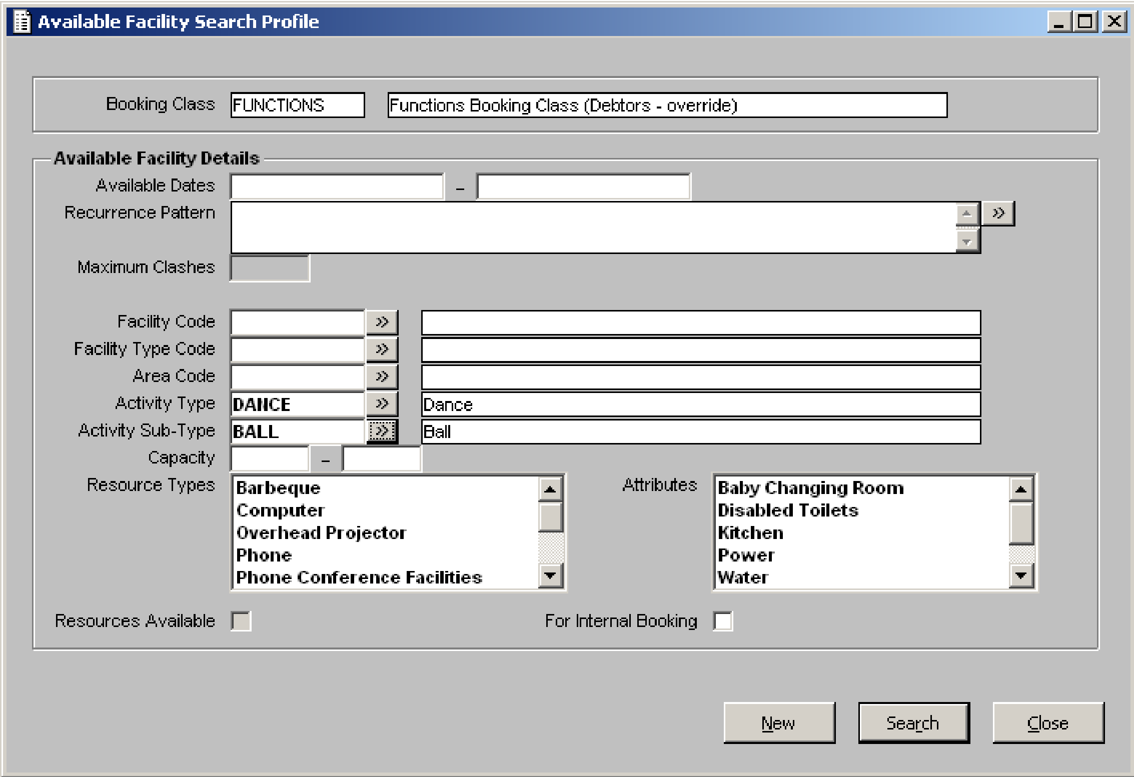
The Available Facility Search Profile form allows the user to search over Facility information to find available Facilities. This is used when searching for a venue to book out to someone. This will search for a Facility that meets the entered search criteria and is free for booking on the entered dates and times. Entering a “Capacity” range will ensure that a Facility able to accommodate the correct number of people is retrieved. The search will display Facilities that meet the search criteria.

Performing a search over “Facilities” in general by not specifying any search criteria will ignore the availability status. This allows the user to see what bookings have been made against Facilities.

If a Recurrence Pattern is specified, then the Available Dates fields on this form are not included in the search profile as the Dates and Times from the Recurrence Pattern form are used instead.

Note: If a search has been performed using a Recurrence Pattern, and the user wishes to perform another search without one, then it will be necessary to access the Recurrence Pattern form (by selecting the Pop Up button next to the field) and delete the record by pressing F11 or selecting Delete from the Edit Menu at the top of the screen. This will remove the Recurrence Pattern criteria from the Search Profile in preparation for another search.

See further details on Recurring Bookings.



Available Facility Search Profile form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Available Dates

Enter a range of dates on which to base your search. Dates may be keyed in or selected from the Calendar Pop Up.

Note: If a Recurrence Pattern is specified, then these Available Dates fields are not included in the search profile as the Dates and Times from the Recurrence Pattern form are used instead.

Recurrence Pattern

The user is also able to use the advanced searching option of Recurrence Pattern which allows the search for recurring available bookings. The entry of the time required is mandatory., i.e. this allows for a search to see if the Town Hall is free from 9am – 11am every fortnight for the next 3 months. This field is optional.

See further details on Recurring Bookings and Conflicting Bookings.

Maximum Clashes
Enter a number to indicate the maximum number of clashes that will be acceptable when retrieving Facilities. This field is optional.

Facility Code
Enter a Facility Code or select one from the Pop Up to include in the search profile. This field is optional.

Facility Type Code
Enter a Facility Type Code or select one from the Pop Up to include in the search profile. This field is optional.

Area code
Enter an Area Code or select one from the Pop Up to include in the search profile. This field is optional.

Activity Type
Enter an Activity Type or select one from the Pop Up to include in the search profile. Using this field allows the search to be filtered to include only those Facilities associated with the selected Activity Type. This field is optional.

Note: ePathway will apply the same logic for web Facility searching.

Activity Sub-Type
Enter an Activity Sub-Type or select one from the Pop Up to include in the search profile. Using this field allows the search to be filtered to include only those Facilities associated with the selected Activity Sub-Type. This field is optional.

Note: ePathway will apply the same logic for web Facility searching.

Capacity
Enter a range of numbers to specify a minimum and maximum capacity for the Facility to include in the search profile. These fields are optional.

Resource Types
This field allows the user to specify certain Resource Types as being attached to the Facility. This allows the user to conduct a search for Facilities that have a kitchen and a white board.

Note: Mobile Resources are not displayed as part of this selection.

Attributes
Attributes is also available as a search option and when using this option, all Facilities that have the Attributes attached will display and allow the user to select a Facility and subsequently create a Booking Request. The user is able to select one or more Attributes to search for. This option may be used in combination with Resource details and other Facility information and date ranges.

Resources Available
Check this flag ON if you wish to find available Facilities which also have certain Resources available. This flag would be used in conjunction with the selection of one or more Resources.

This allows the user to search for Facilities that have the specified resource available on the dates and times entered in the search profile. The ability to nominate one or more Resource Types is provided.

If an open search is performed (i.e. no dates), the system will search for all available Facilities where the selected Resources are available from the current date and time onwards.

For Internal Booking

Check this flag ON if the available Facilities are to also include Facilities that are flagged for 'Internal Bookings only'.

If this flag is checked ON before a search is performed, the search results will include Facilities (and Sub-Facilities) which are flagged 'For Internal Booking' at the parameter level. Additionally, when one or more of these 'Internal' Facilities (or Sub-Facility) is selected from the Selection form to create a new Booking, the Internal Booking flag on the Booking Entry form will be automatically checked ON to prevent any Fees from being allocated.

See further details: Internal Bookings Only

Recurrence Pattern Maintenance Form

This form may be used to define a Recurrence Pattern on which to search for Available Facilities. This will define criteria for retrieving any Facilities which are available for booking on a recurring basis, i.e. daily, weekly, monthly or yearly.

To create a new Recurring Booking via the "Available Facilities" search button:

1. On the Booking Search Profile select the Available Facilities button
2. On the Available Facility Search Profile click the Pop Up button on the Recurrence Pattern field
3. Set up a Recurrence Pattern and click OK
4. Back on the Available Facility Search Profile select any other required search criteria, e.g. Resources
5. Click the Search button
6. Select an available Facility or Sub-Facility from the Available Facility Selection (Recurrence) form and click the Book button
7. This will create a new Booking Request with the **first Booking Line** added, and, by default, the Recurring Booking flag is checked ON.
8. Fill in the required Booking details and select the Recurrence button against the Booking Line to generate all instances of the Recurring Booking.
9. A confirmation message will display indicating the number of occurrences that will be created
10. Click Continue

When 'Recurrence Pattern Maintenance' is used to generate Lines for a Booking with the Recurring Booking checkbox set ON, the checkbox is dimmed. All of the generated Lines are linked to the same Recurrence Pattern, which can only be accessed in display mode via "Recurrence Pattern Enquiry". However, new Lines can be entered on the Booking Request and a different Recurrence Pattern can be specified against these.

To generate Recurring Booking Lines from an existing Booking Line

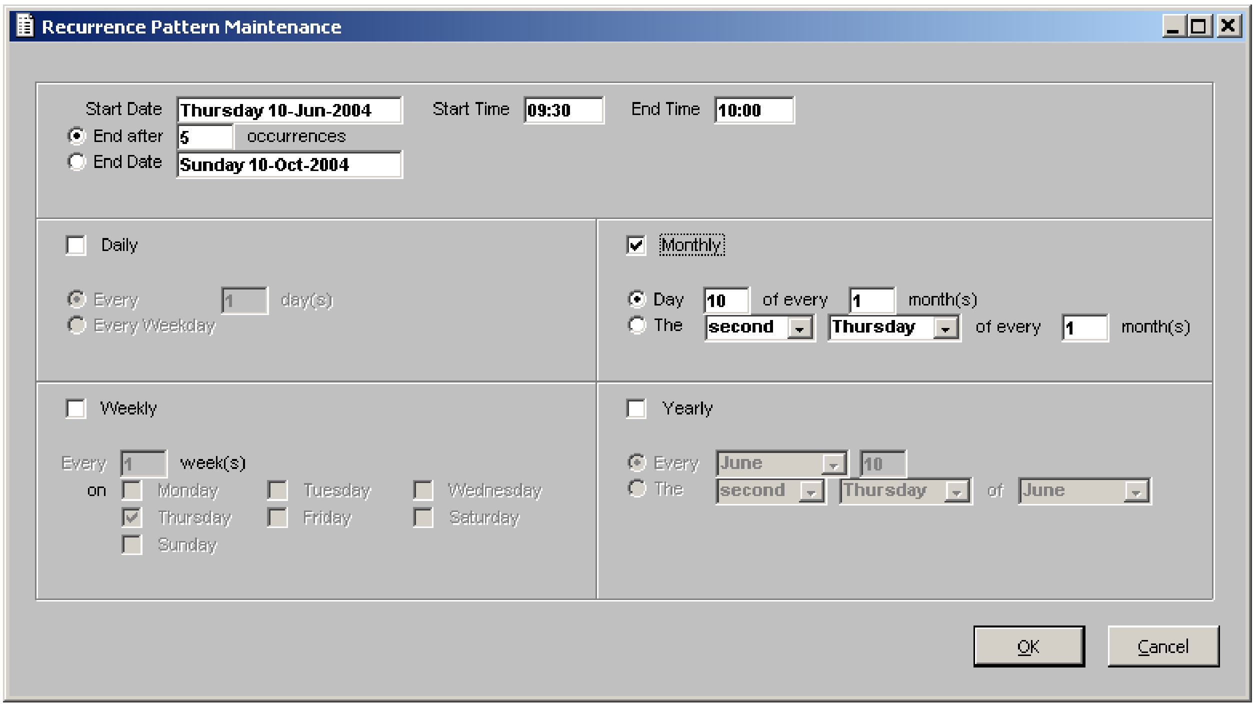
1. Check the Recurring Booking flag ON
2. On a Booking Line, click the Recurrence Button
3. On the Booking Line Recurrence Pattern Maintenance form set up the required Recurrence Pattern and click OK
4. This will create a Booking Line for each occurrence in the Recurrence Pattern, as well as dim the Recurring Booking checkbox, indicating that the Booking Lines are now linked.

Generating Multiple Booking Lines via 'Recurrence Pattern Maintenance'

'Recurrence Pattern Maintenance' may be used to simply generate multiple Booking Lines without a Recurrence link, by ensuring the 'Recurring Booking' flag is OFF when the Recurrence button is selected. The Booking Lines generated are regarded as ordinary Booking Lines.

> Note: When Recurring Booking Lines/Multiple Booking Lines are generated, the Fee charges from the Parent Booking Line (including any discounts and inserted Charges) are applied to the generated Lines.

See further details on Conflicting Bookings and Booking Line Processing.



Recurrence Pattern Maintenance form

Start Date/Start Time/End Time/ End After X Occurrences/ End Date
The user is required to enter a Start Date, Start Time and End Time over which to search as well as the number of occurrences the Booking is required for. The system will then calculate the End Date based on the Daily, Weekly, Monthly or Yearly settings. Alternatively, a Start Date and End Date may be entered and the system will calculate the number of occurrences based on the other parameters. If the Start Date or End Date is modified, then the Number of occurrences able to be scheduled between those dates will be recalculated based on the other parameters. Initially, the current Date and Time (rounded to the nearest half hour) will default into these fields (with an End Time of half an hour later) as they are mandatory fields. The user is then required to modify them to correspond to the proposed booking schedule.

Daily/Every X Days/Every Weekday
These fields allow the user to specify the pattern of recurrence which the Booking is likely to follow, e.g. Every 2 days, or Every Weekday.

Note: The user is required to enter a Start Date for the Daily occurrence as well as an End Date or the number of bookings required. One of these must be entered for the search to proceed. (see Start Date.).

Weekly/Every X week(s)/On (Day of Week)
These fields allow the user to specify the pattern of recurrence which the Booking is likely to follow, e.g. Every 2 weeks on Thursday.

The user is allowed to nominate more than one day on which the event can occur.

Note: The user is required to enter a Start Date for the Weekly occurrence as well as an End Date or the number of bookings required. One of these must be entered for the search to proceed. (see Start Date..).

Monthly/Day X or every X month/The X Day of every X Month(s)

These fields allow the user to specify the pattern of recurrence which the Booking is likely to follow, e.g. Day 10 of every 2 months; or The second Thursday of every 1 month.

> Note: The user is required to enter a Start Date for the Monthly occurrence as well as an End Date or the number of bookings required. One of these must be entered for the search to proceed. (see Start Date.)

Yearly/Every (Month) (Year)/The X (Day) of (Month)
These fields allow the user to specify the pattern of recurrence which the Booking is likely to follow, e.g. Every June 10, or The second Thursday of June (where the date will differ each year).

> Note: The user is required to enter a Start Date for the Yearly occurrence as well as an End Date or the number of bookings required. One of these must be entered for the search to proceed. (see Start Date.).

Available Facility Selection Form

The Available Facility Selection form displays all Facilities meeting the search criteria. Once a display of available Facilities is provided the user is able to select one or more occurrences and create a Booking Request by selecting the ‘Book’ button. The selected Facility is then automatically linked to the Booking Request.

The Multi-Book flag displays for any Facility that allows Multiple Bookings and another Booking has been found at any time on the same day as the displayed time frame. Note that this differs slightly from the other indicators, like Sub Facilities etc. where the indicator only shows when other Related Bookings occur at the same time as the displayed Time Frame.

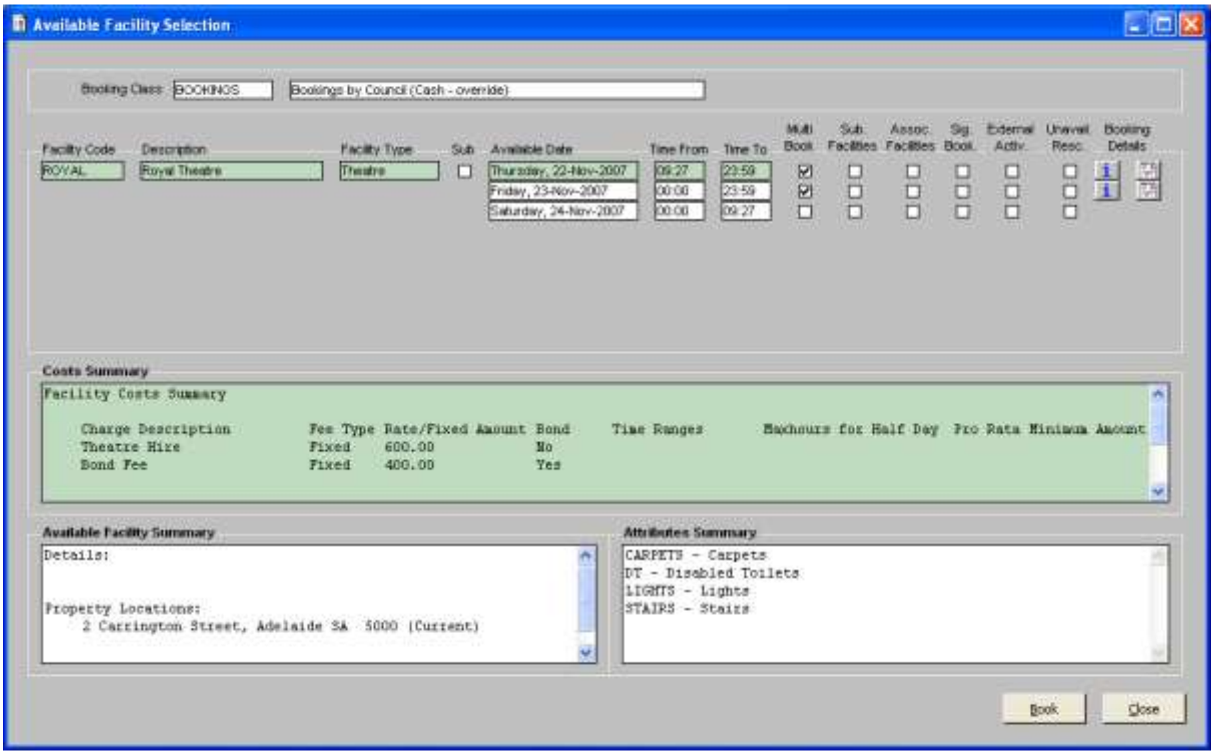
The ‘Info’ icon button is shown for a Facility that allows Multiple Bookings and other Bookings for that Facility occur on the same Day.

This form also includes the ‘Display Calendar’ button along with the ‘Info’ button when there are other Bookings for a Facility that allows Multiple Bookings. This will give the user the option of viewing the displayed ‘Available’ time frame, and the other Bookings for the Facility, by using either the ‘Related Bookings Enquiry’, or the ‘Calendar’, if they wish. By using the Calendar the user will be able to view Bookings that occur on and around the day of the selected timeframe, in the same way they can from Booking Entry.

If the user attempts to book a Facility that has been flagged in this way from the ‘Available Facilities Selection’ form the following message dialog will display as an additional prompt that other Bookings exist that may impact the new Booking.

Note: In Enquiry mode this form is called “Available Facility Enquiry” and exhibits the following characteristics:

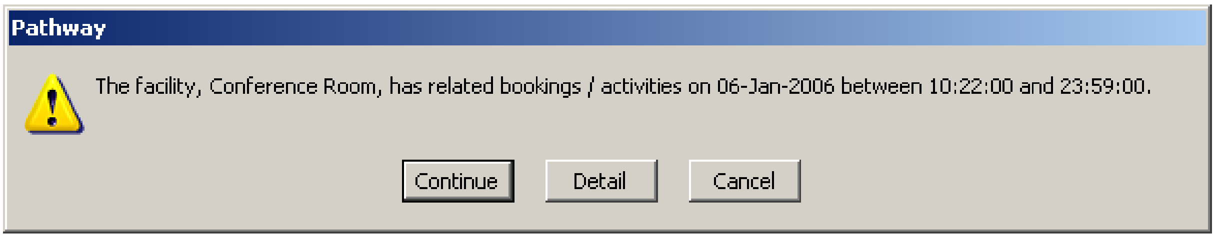
- Multi-select is not available
- The ‘Book’ button is not available
- Double-clicking on an occurrence does nothing
- The Related Booking Enquiry and Calendar buttons will display where appropriate and will display in Enquiry mode.



Available Facility Selection

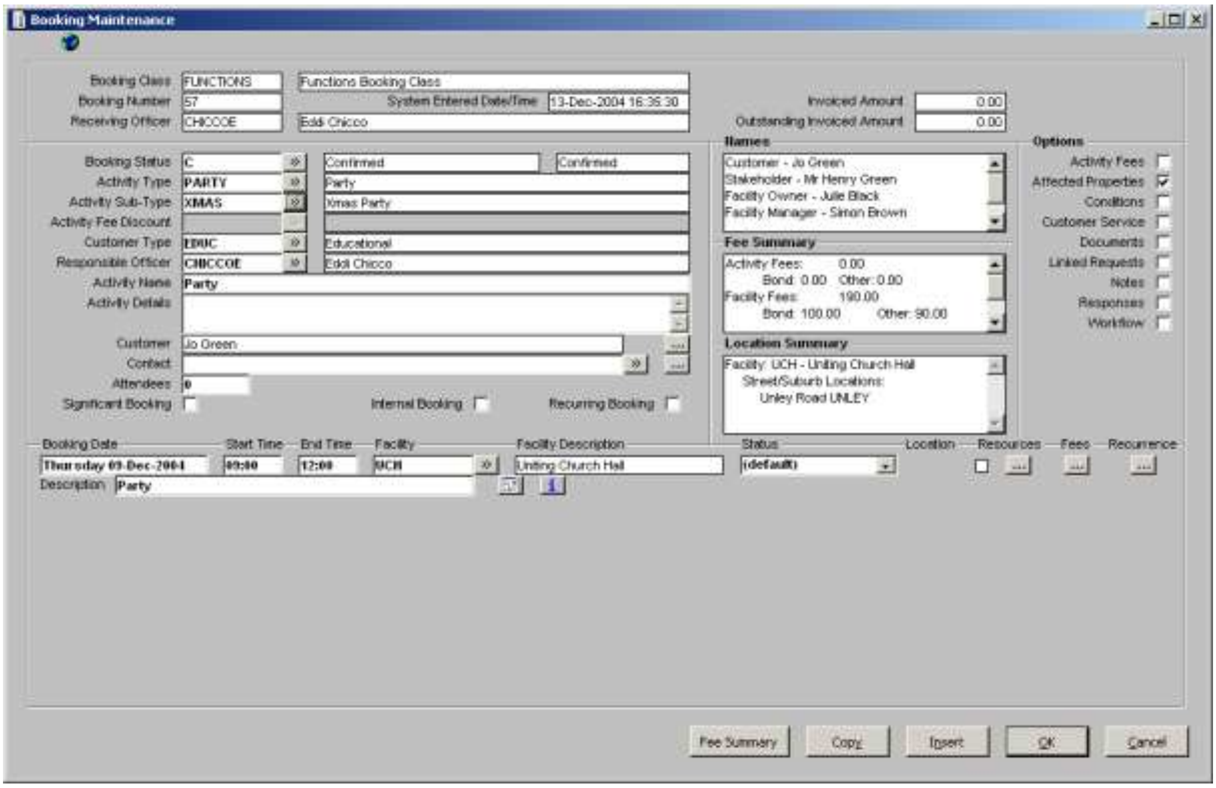
Related Bookings/External Activities

If any of the selected booking occurrences are affected by related Bookings or Activities (e.g. Significant Bookings, Associated Facility Bookings or External Activities) a message will display to warn the user, e.g.



The user is then able to view the details of the related bookings/activities, Cancel out and make a different selection, or continue with the Booking.

Subsequently, when a new Booking Request is created containing the selected Booking Lines an Information Button will display on the affected Booking Line, e.g.



Booking Entry form showing the Information button on the Booking Line

The Information button allows the user to view any related Bookings/Activities/External Activities etc if they exist.

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility Code/Description/Facility Type

These fields display details of the Facility, e.g. TR1, Training Room 1, Corporation.

Sub –Type Flag

This flag displays against each Facility to indicate whether the Facility is a Sub-Facility.

Available Day

This field displays the day on which the Facility is available.

Available Date

This field displays the Date on which the Facility is available.

Time From/Time To

These fields display the Times at which the Facility is available. If no further bookings exist for the Facility, then the ‘Time To’ component will be blank, indicating that the Facility is available indefinitely from then on.

Multi-Book Flag

The indicator shows the status of the ‘Allow Multiple Booking’ flag of the Facility for which the enquiry has been called. This flag will be checked on whenever any other Booking for the Facility occurs at any time on the same day, (whereas the other indicators only show when Related Bookings occur at the same time as the displayed timeframe.)

Sub Facilities Flag

This indicator will be set ON if any Bookings exist on any sibling Sub-Facilities of the listed Sub-Facility.

Associated Facilities Flag

This indicator will be set on if any Associated Facilities have Booking Requests for the Date and Time that the search has been conducted. A detail button is available that will display the Related Bookings Enquiry form listing all the Bookings for the Associated Facilities.

Significant Booking Flag

This indicator will be set ON if there are any Significant Bookings in the Area where the Facility is located e.g. A potentially noisy function could have been booked for an adjacent Room in the same Facility, and this could be a factor for the customer to consider when making a Booking.

A detail button is available that will display the Related Bookings Enquiry form listing all the Significant Bookings.

External Activity Flag

This indicator will be set ON if there are any External Activities that have been set for notification on the current system date.

Unavailable Resources Flag

This indicator will be set ON to indicate that for the specified time slot there is no Resource of the required type that is available for the whole duration, i.e. None of the specified Resources are booked simultaneously, but none is available for the entire duration. For example,

> The required date/time is Wednesday, 30th June 11.00am to 4.00 pm.
> Computer 1 has been booked from 9.00 am to 12.00 pm
> Computer 2 has been booked from 1.00 pm to 5.00 pm
> Neither computer is available for the entire required duration.

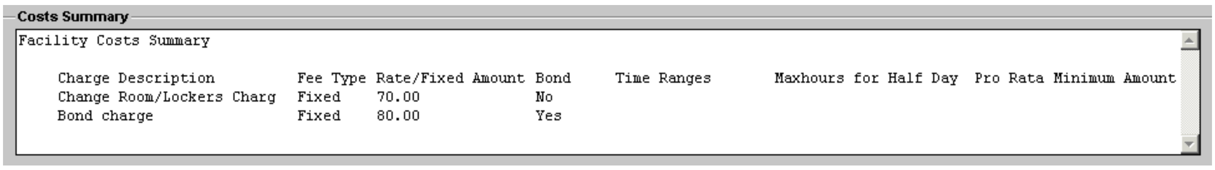
In this case the Facility displays on the Selection form with a detail button where the user can check the available and unavailable time slots.

Information Button

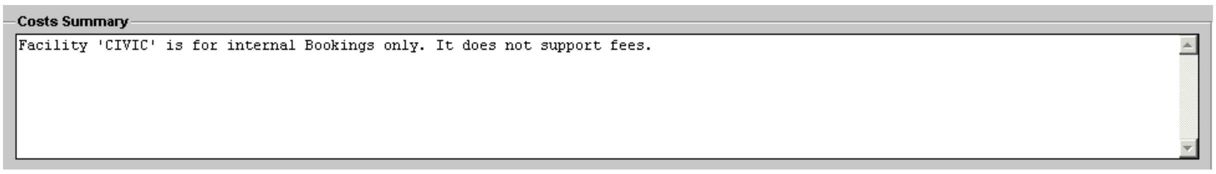
The Information button i will display if there are any flags set to ON indicating there are Booking Requests present. Selecting this button will display the Related Bookings Enquiry form displaying details of Bookings or External Activities that need to be considered. This button will also display when a 'Multi-book' situation occurs for a Facility on the same day. In addition the Calendar Button will display alongside the 'Info' button to give the user a choice of how they would like to review the 'Other' Related Bookings.

Costs Summary

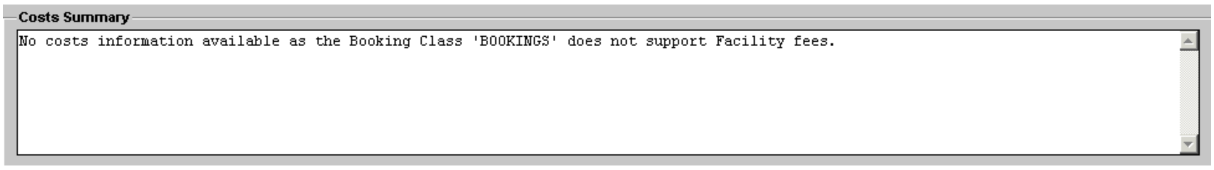
The Costs Summary box displays details of Fee Charges for a selected Facility within an available Date/Time range, e.g.



If a Facility is flagged for Internal Bookings only, then no Charges will apply and hence none will display in the Costs Summary box, e.g.



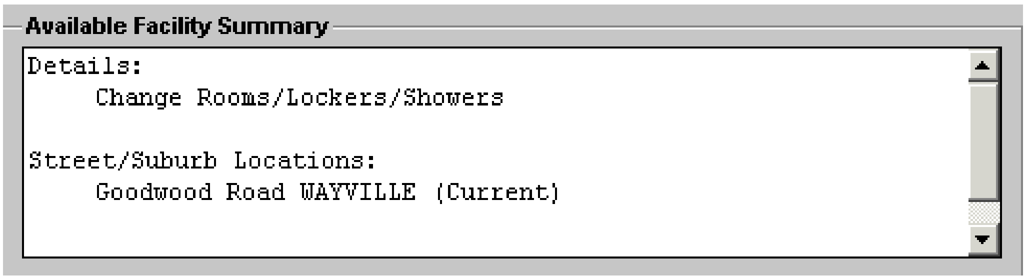
If a Facility belongs to a Booking Class in which the 'Allow Fees against Facility' flag has been turned OFF, then no Charges will display in the Costs Summary box, e.g.



Double Clicking or pressing F2 in the field will zoom the Summary box.

Available Facility Summary

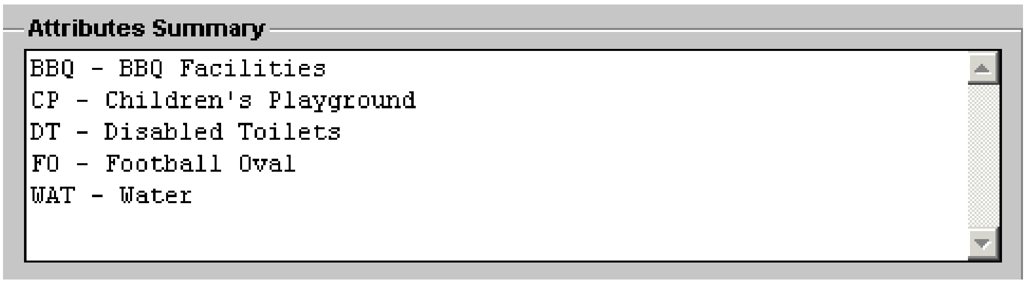
The Available Facility Summary box displays details of the selected Facility, such as Street/Suburb Location etc, e.g.



Double Clicking or pressing F2 in the field will zoom the Summary box.

Attributes Summary

The Attributes Summary box displays all Attributes pertaining to a selected Facility, e.g.



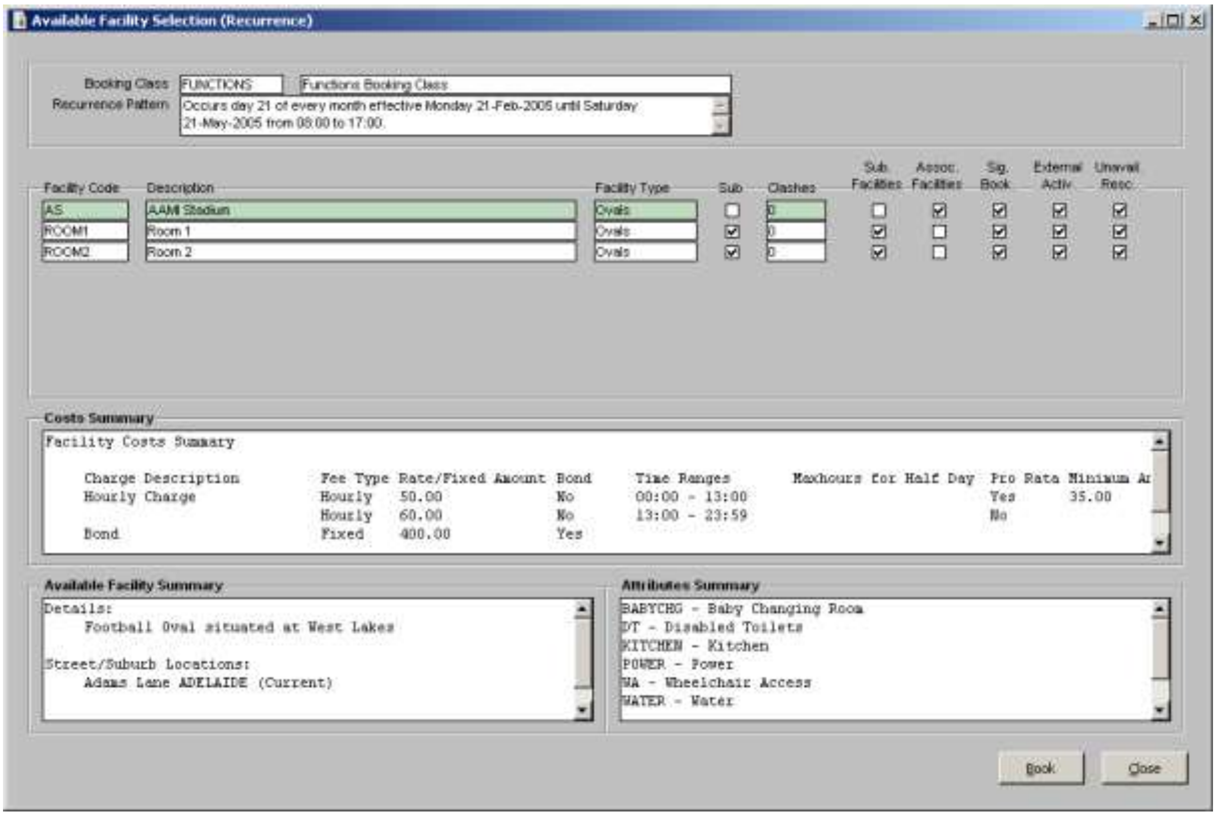
Double Clicking or pressing F2 in the field will zoom the Summary box.

Available Facility Selection (Recurrence) Form

The Available Facility Selection (Recurrence) form displays after a search has been performed using a Recurrence Pattern. See Recurring Bookings via Available Facility Search.

It displays all Facilities meeting the search criteria. Once a display of available Facilities and Sub-Facilities is provided the user is able to select the Facility and create a Booking Request. The selected Facility is then automatically linked to the Booking Request.

If any indicators on the right-hand side are checked ON it means that other Bookings /External Activities exist at the same time which may impact on the booking of the Facility/Sub-Facility. If any indicators are ON, an Information button will become available to allow the user to display the Related Bookings.



Available Facility Selection (by Recurrence Pattern) form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Recurrence Pattern

This field contains a description of the Recurrence Pattern established in the Recurrence Pattern Maintenance form.

Facility Code/Description/Facility Type

These fields display details of the Facility., e.g. AS, AAMI Stadium, OVAL.

Sub

This flag displays against each Facility to indicate whether the Facility is a Sub-Facility.

Clashes

This field displays the number of Booking Clashes encountered for a Facility.

Sub-Facilities

This indicator will be set ON if any Bookings exist on any sibling Sub-Facilities of the listed Sub-Facility.

Associated Facilities

This indicator will be set on if any Associated Facilities have Booking Requests for the Date and Time that the search has been conducted. A detail button is available that will display the Related Bookings Enquiry form listing all the Bookings for the Associated Facilities.

Significant Booking

This indicator will be set ON if there are any Significant Bookings in the Area that the Facility is located. A detail button is available that will display the Related Bookings Enquiry form listing all the Significant Bookings.

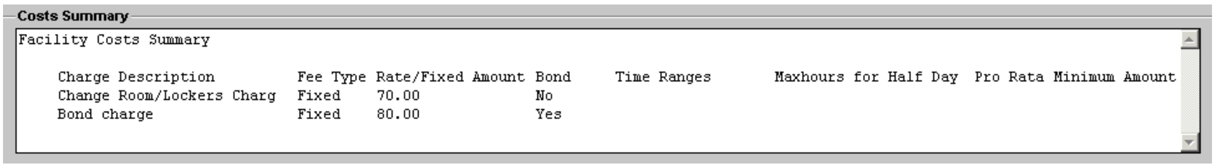
External Activity

This indicator will be set ON if there are any External Activities that have been set for notification on the current system date.

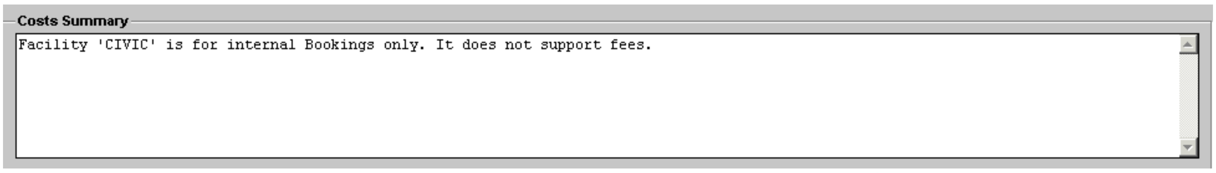
Unavailable Resources
This indicator will be set ON to indicate that for the specified time slot there is no Resource of the required type that is available for the whole duration, i.e. None of the specified Resources are booked simultaneously, but none is available for the entire duration. For example,

> The required date/time is Wednesday, 30th June 11.00am to 4.00 pm.
> Computer 1 has been booked from 9.00 am to 12.00 pm
> Computer 2 has been booked from 1.00 pm to 5.00 pm
> Neither computer is available for the entire required duration.

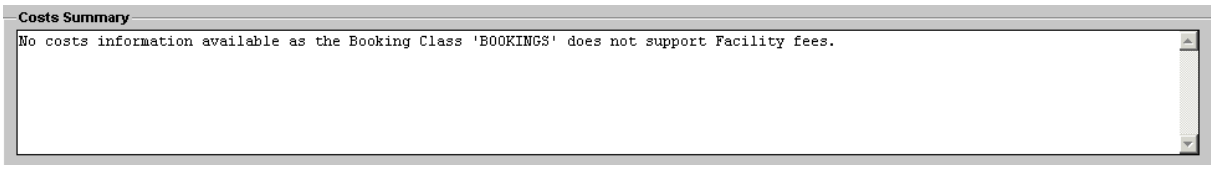
Costs Summary
The Costs Summary box displays details of Fee Charges for a selected Facility within an available Date/Time range, e.g.



If a Facility is flagged for Internal Bookings only, then no Charges will apply and hence none will display in the Costs Summary box, e.g.

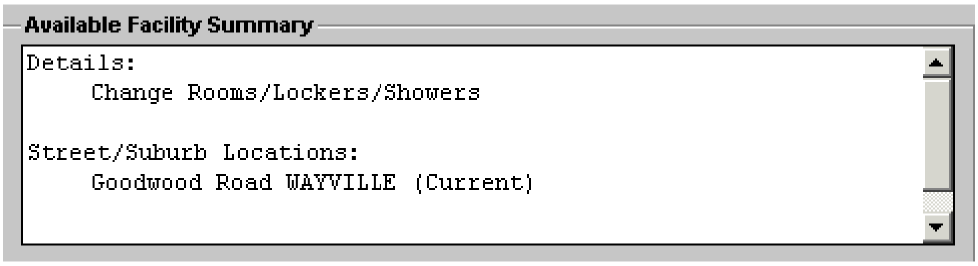


If a Facility belongs to a Booking Class in which the 'Allow Fees against Facility' flag has been turned OFF, then no Charges will display in the Costs Summary box, e.g.



Double Clicking or pressing F2 in the field will zoom the Summary box.

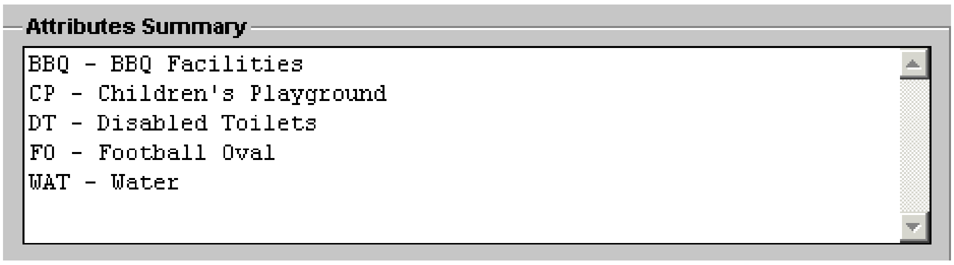
Available Facility Summary
This Summary box displays summary details of the Available Facility which has focus.
The Available Facility Summary box displays details of the selected Facility, such as Street/Suburb Location etc, e.g.



Double Clicking or pressing F2 in the field will zoom the Summary box.

Attributes Summary

The Attributes Summary box displays all Attributes pertaining to a selected Facility, e.g.



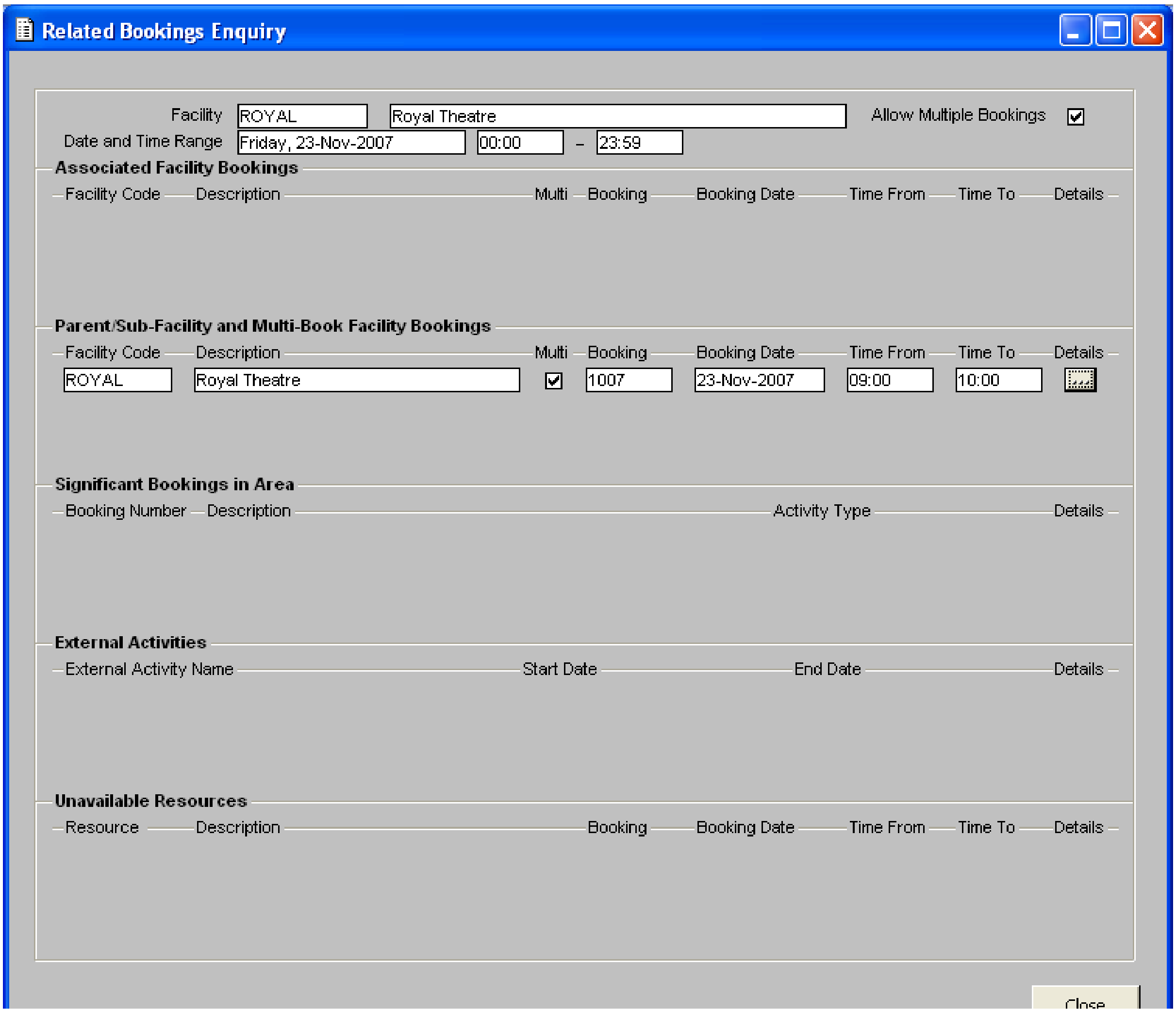
Double Clicking or pressing F2 in the field will zoom the Summary box.

Related Bookings Enquiry Form

This form displays when the Information button is selected on the Available Facility Selection form indicating that a Booking already exists for associated Facilities, or that Significant Bookings/External Activities exist which may affect the Booking. The Information button also displays in other forms, such as the Booking Request form, and will display the Related Bookings Enquiry form if selected.

Additionally, Related Bookings will include sibling Sub-Facilities and their Parent Facilities where the 'Autobook' feature has been enabled. This means that the user will be able to view Bookings on other related Sub-Facilities and their Parents at any time on the same day.

When using the 'Information' button the Related Booking Enquiry form will display Related Bookings over a 24 Hour time range, i.e.: the full day in question. This expands the usefulness of this enquiry by allowing the user to view other Bookings and Activities that occur on the same day. Whilst the other Bookings may not directly overlap, they may perhaps have an impact on the Booking in question. Also, the Related Booking Enquiry includes a 'Booking Number' column for the "Associated Facility Bookings", "Parent/Sub-Facility Bookings" and "Unavailable Resources" sections of the display. This may assist the user in identifying the Booking without necessarily having to display the 'Booking' Enquiry via the associated detail button.



Related Bookings Enquiry form

Facility

These fields display details of the Facility, e.g. TR1, Training Room 1.

Date and Time Range

The Date and Time Range fields display the Date/Time slot selected from the Available Facility Selection form, which is a Date/Time on which the Facility is available. When using the 'Information' button to access this time slot will be a 24 hour time slot covering the whole day.

Associated Facility Bookings

These fields display any Associated Facilities or Sub-Facilities which have been booked during the Available Date/Time specified above, the date on which the Associated Facility has been booked, and the Start and End Times pertaining to the booking of the Associated Facility.

The 'Allow Multiple Bookings' flag will also show when a Facility has its 'Allow Multiple Bookings' flag set on. This will help the user identify those Facilities or Sub-Facilities that can have Multiple Bookings.

Selection of the Detail button displays the Booking Request pertaining to the Associated Facility.

Parent/Sub-Facility and Multi-Book Facility Bookings

These fields display any 'sibling' Sub-Facilities which have been booked during the Available Date/Time specified above, the date on which the Sub-Facility has been booked, and the Start and End Times pertaining to the booking of the Sub-Facility.

In addition it will display details of any other Bookings for the main Facility on the same day. It will also show the status of the ‘Allow Multiple Bookings’ flag for each Facility.

Selecting the Detail button will display the related Booking (in Enquiry mode).

Significant Bookings in Area
These fields display any Significant Bookings in the Area that the Facility is located which have been booked during the Available Date/Time specified above. Details of the Booking Number, Description and Activity Type are displayed.

Selection of the Detail button displays the Booking Request pertaining to the Significant Booking.

External Activities – External Activity Name
These fields display details of any External Activities that have been set for notification on the specified date, including the Start and End Date. Details of the Activity Name, Start Date and End Date are displayed.

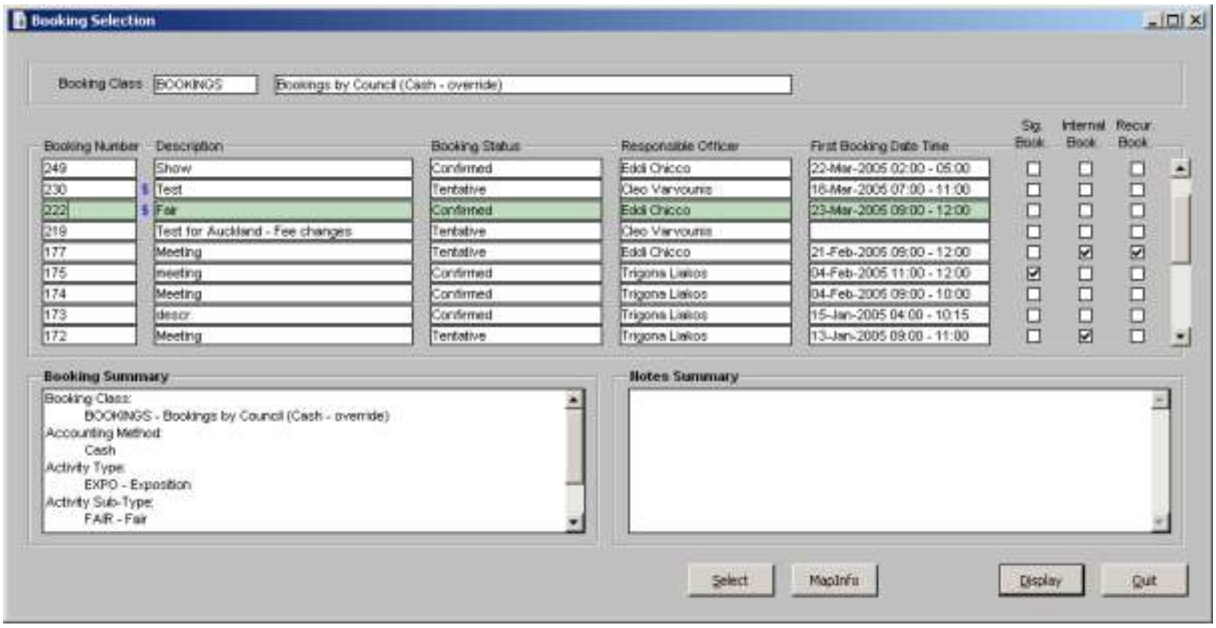
Selection of the Detail button displays the External Activity form which includes further details.

Unavailable Resources
These fields display details of any specified Resources that have been booked during the nominated period, including the dates and times of the Booking.

Selection of the Detail button displays the Booking Enquiry form showing details of the related Booking.

Booking Selection Form

The Booking Selection form is called from the Booking Search Profile when more than one Booking exists. It allows the user to search for an existing Booking or create a new one.

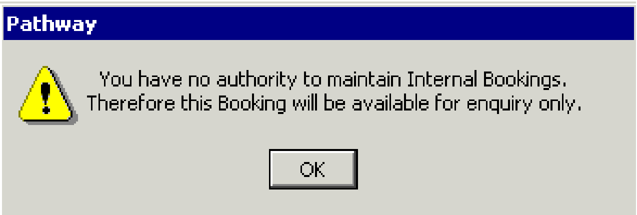


Booking Selection Form

Multi-selection of Booking Requests is available using the SHIFT or CONTROL keys and clicking with the mouse. Once a selection is made, the first Booking Request is displayed with Navigation Buttons in the bottom left hand corner of the form. Using these buttons the user is able to scroll through and view/maintain each Booking Request.

Navigation buttons

If the user is not authorised to maintain Significant or Internal Bookings then a message will display when one of these is encountered, and the Booking Request will display in Enquiry mode only, e.g.



Cash Invoicing Indicator

The 'Dollar' Indicator ($) which displays in front of the Description of selected Bookings indicates that the Booking is using Cash Invoicing.

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number/Description

These fields display the Booking Number and description allocated to a Booking Request.

Booking Status

The Booking Status field displays the Status of the Booking Request. This would be one of the Booking Statuses as defined by Council in the Booking Parameters e.g. Confirmed..

Responsible Officer

This field displays the User assigned as Responsible Officer for the Booking Request. The Responsible Officer would have been automatically assigned by the system when the Booking Request was created. The user entering the Booking Request would have been defaulted as the Responsible Officer, however, this may have been changed to another User.

First Booking Date/Time

This field displays the Date and Time of the first (or earliest) Booking Line for the Booking Request. Booking Requests which have no Booking Lines, have been cancelled or whose Status has changed to 'Available for Booking' will have no details in this field. The Time details display the duration of the Booking Line e.g. 09:00 – 12:00.

Significant Booking/Internal Booking/Recurring Booking

These indicators are display only and inform the user as to the type of Booking i.e. Significant, Internal and/or Recurring. These categories are not mutually exclusive i.e. a Booking Request may have all 3 indicators checked ON. Double-clicking one of these indicators has the same effect as double-clicking anywhere on the Booking occurrence and allows the user to access the respective Booking Request either in maintenance mode or display mode depending on where the user was coming from.

See further details on Significant Bookings, Internal Bookings and Recurring Bookings.

Booking Summary

The Booking Summary box displays details of the Booking Request which currently has focus. It includes details of the Activity Type, Customer, Customer Type and Location etc, e.g.

Activity Type:
EXHIBITION - Exhibition
Activity Sub-Type:
ART - Art Exhibition

Customer Type:
R - Religious
Customer:
Miss Eddi Chicco
Location:
Facility: MD - Memorial Drive
Street/Suburb Locations:
Albert Place ADELAIDE
Adams Lane ADELAIDE

Note: If the Booking Request which has focus is part of a Recurring Booking then all Facilities and their Locations pertaining to the generated Booking Lines will display in the Booking Summary box.

Notes Summary

The Notes Summary box displays any Note Details attached to the Booking Request which currently has focus.

Booking Entry/Maintenance/Enquiry Form

A Booking Request is a request from a Customer to book and use Facilities or apply to council to hold an Event. Booking Requests are created within each class.

Booking Numbers are allocated by the system and are not unique within each class, i.e. The Facility Class will have Booking Request 1 and the Event Class will have the next Booking Request Number of 2. This approach has been used so that documents generated from the Bookings Management module are able to have the same Booking and Payment Reference. (A Payment Reference must be unique for the Bookings Management module, and to avoid having two numbers, a single number is utilised. This will be the Booking Request Number.)

The Booking Request Number is allocated when the Booking Request Maintenance form is accessed. This means that if the user enters Booking Request Maintenance, and then does not save the request, the Booking Number will have been used and will not be used again.

Security assignment is checked and allows maintenance of Booking Requests only to the appropriate users.

Booking Lines on this form will be displayed in ascending Date/Time order.

Note: In the smart client when the Bookings Entry screen is accessed to add a new Booking, no default Booking Line is added. The user must add lines via the Add Button or selection from the Calendar. If no lines are added and an attempt is made to save the Booking, the user will be prompted to add at least one Booking Line before the Booking can be saved.

Booking Line Processing

Note: A filter button has been added to the Booking Line grid, in the Smart Client version of this form, to enable the display of records from the current date onwards only as well as all records.

When a Booking Line is entered, validation on the availability of the Facility is performed as soon as the Facility is entered or selected. Subsequently, any changes to the Date or Time will initiate re-validation and warnings will be issued if any clash is detected.

If the Facility is available for booking, the Booking Line is created normally with any auto load Fees added. Resources are also able to be selected. Any messages relating to the auto-booking of any sub-facilities will display if appropriate.

If a clash is detected (i.e. another Booking Line exists for the Facility at the same date and time), then a message will display advising the user of the nature of this clash. It is then the user's responsibility to take one of the following courses of action:

- Continue with the existing booking details and render the Booking Line 'Conflicting'. The status of the Booking Line will automatically be set to the status of 'Conflicting'. The Booking Line then becomes invalid, and any Fees are removed. Any previously allocated Resources will, however, remain allocated.
- Change the Facility to another available Facility. This option will remove any previous Fees and insert any auto-load Fees from the new Facility. Previously selected Resources will be removed and any new ones pertaining to the new Facility will become available for selection.
- Change the Date and/or Time to an available one for the same Facility. This option will re-load any Fees for the Facility taking into account any altered Dates or Times.

Changing the Date, Time or Status of a Booking Line

Facility fees and Resource fees are recalculated after a Booking Line date, time or status change (as of Release 3.03). Previously the fees would have just been deleted if this occurred on the Booking Maintenance form, the Calendar or the Recurring Booking Maintenance form.

Note: Any manual changes to a fee on a booking line will be lost after a date or time change. Also note that any Activity Fees on a booking line that were not added via auto-load will be removed by a booking line date or time change and they can not be manually added again.

What to do with a 'Conflicting' Booking Line

When a Booking Line has a 'Conflicting' Status the following options are available to the user:

- The status of a 'Conflicting' Booking Line may be set to 'Cancelled' or 'Declined' without having to change the values of the Booking Date or Times in order to make the Booking Line appear valid.

- The Booking Date or Times may be set to valid, non-conflicting values.

- The different available Facility may be selected.

If no action is taken the Booking will be recorded with the 'Conflicting' status and will not be eligible for further processing. The red button glyph provides an immediate visual cue for the user that the Booking Line has a 'Conflict'.

Note: It will not be possible for users to manually set a Booking Line to a status of 'Conflicting'.

Note: As soon as any Fee on a Booking Line has been invoiced, critical details of the Booking Line cannot be changed (and will be dimmed), even if the Invoiced items are fully Credited. If the user wants to re-invoice the booking they will need to create a new Booking for the same details. In such a case the Status of the fully Credited Booking Line would need to be set to 'Cancelled' to allow a new Booking to be raised.

Activity Fees on the other hand do not prevent the alteration of Booking Lines even when an Activity Fee has been Invoiced. In this situation, if a Booking Line is altered, the duration details will be updated and the Fees on any 'Un-Invoiced' Activity Fees will be recalculated, and the other Fees will be flagged with the little red spanner to alert the user that the details of that Fee may need to be reviewed.

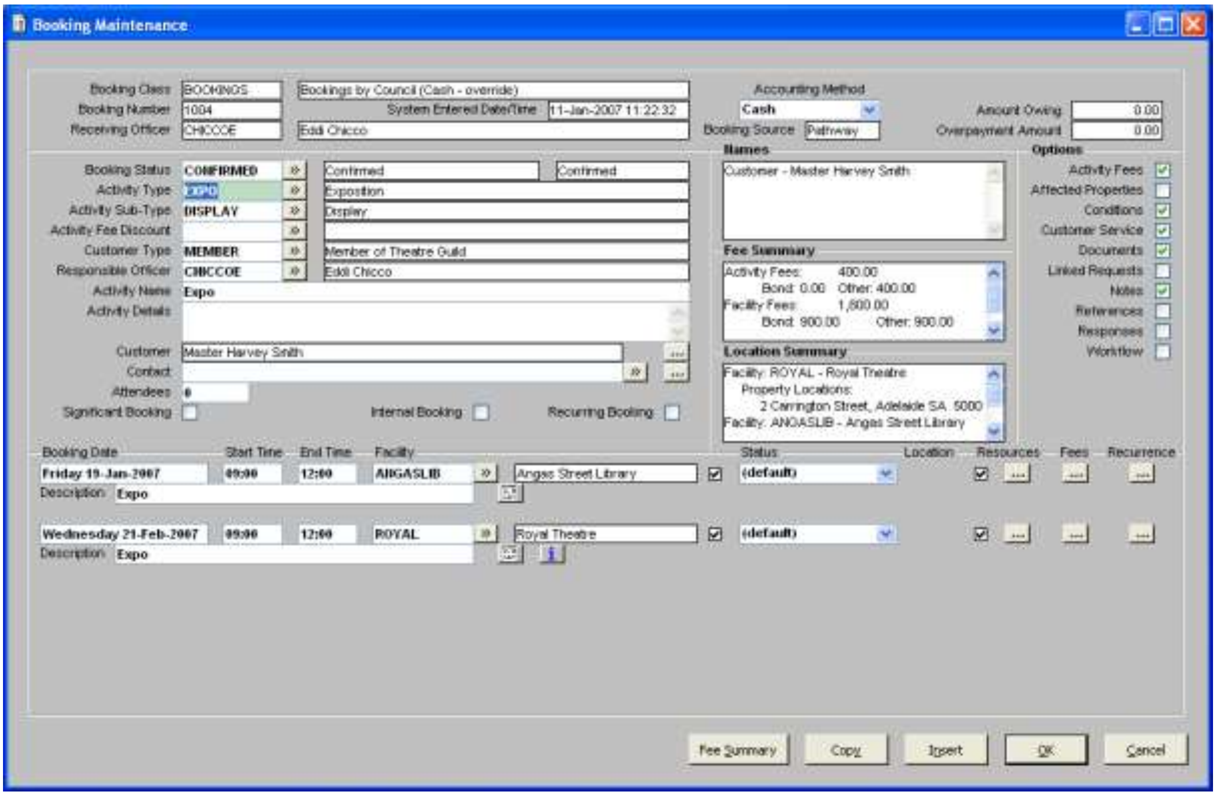
Related Bookings/Activities Warning

In addition to Conflicting Bookings, the user is also warned of Related Bookings/Activities which are likely to impact on the current Booking. The following Bookings/Activities are included in this warning:

- Any Bookings which are to occur on the same day/time for the same Facility and are flagged as Significant Bookings
- Any Bookings which are to occur on the same day/time for an Associated Facility
- Any External Activities whose Notifiable Date includes the current Booking Date/Time
- Any Bookings for a sibling Sub-Facility which are to occur on the same day/time.

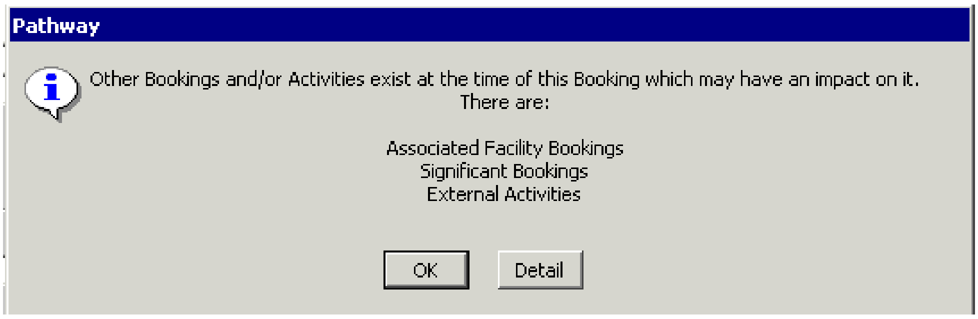
An Information Button displays to warn the user of the existence of these other Bookings/Activities, however, further processing is not prevented, and the user may select this button to view these Bookings/Activities.

See Related Bookings/Activities under Available Facility Selection.

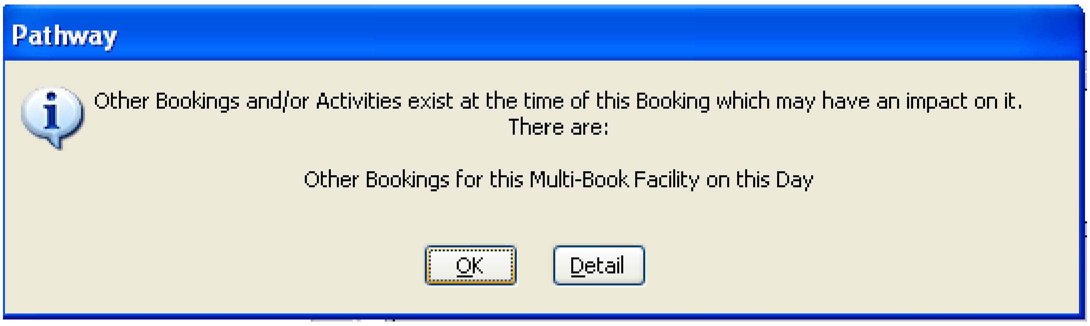


Booking Entry/Maintenance form

In Booking Entry, when inserting or modifying Booking Lines, the following message may display to indicate a potential disruption to the current Booking from an Associated Facility, Significant Booking or External Activity. Clicking the Detail button will display the Related Bookings Enquiry form showing further details.



If there are other bookings for the multi-book facility on the same day, then a message similar to the following will display. Additionally, the 'Info' Icon button will also display against the Booking Line to allow the user to view the other booking details.

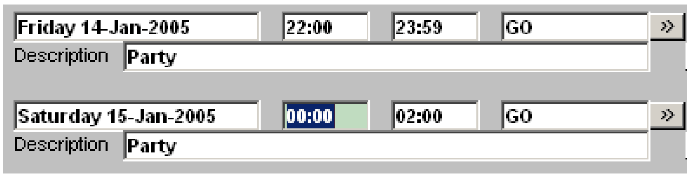


Using the Calendar to create Booking Lines

The Calendar may also be used to find available dates and times. When a new Booking line is inserted, and before any details are added, the Calendar button may be accessed and a Booking Date/Time slot selected from either the Weekly or the Monthly Calendar. Selecting the Book button on the Calendar will copy the Date/Time details to the blank Booking Line. (The Facility details need to be entered separately into the Booking Line.)

If only the Date is entered into the Booking Line before the Calendar is accessed, the Weekly Calendar will open at the specified date. If a Facility is also entered before the Calendar button is selected, the Weekly Calendar will open at the specified date with the selected Facility details shown. The Calendar will be in ‘Facility’ mode showing only Bookings for the selected Facility.

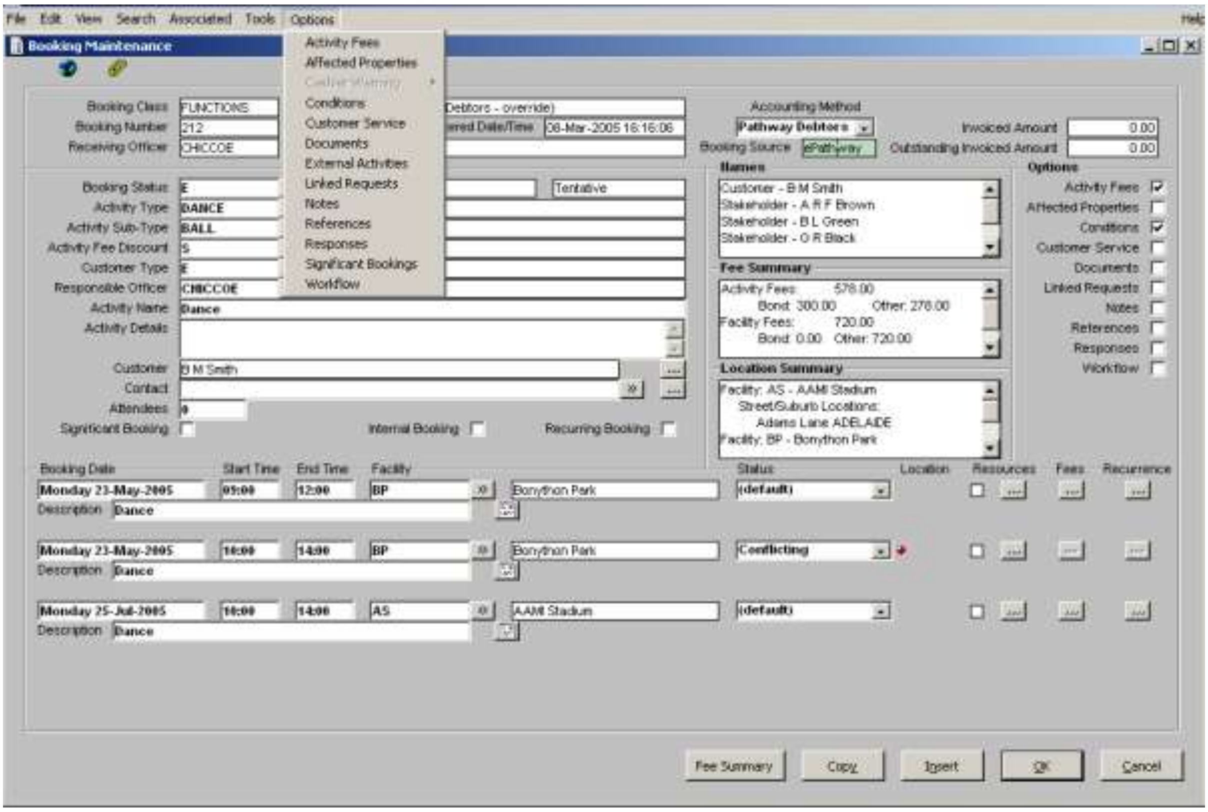
If multiple time slots are selected from the Calendar, with some extending across 2 consecutive days, selecting the Book button will create Booking Lines for each separate selection. Any selection made across two days will produce two separate Booking lines, e.g.



Note: In the Smart Client the Calendar button may be used to add a Booking Line. With focus on a Booking line, clicking the Calendar button and making a selection will capture the information and create a booking line using the Facility and time slots from the Calendar. Pathway will ask “Do you wish to add a new Booking Line OR update the currently selected Booking Line?”. Selecting ‘Add’ will create a new Booking Line. Selecting ‘Update’ will update the details of the currently selected Booking Line.

Options

Options are provided on the Booking Maintenance form as on/off indicators which may be accessed by double-clicking. In addition, these Options are also provided from the Options Menu as part of the top menu bar. These provide an alternative access to the various Options.



Booking Maintenance form showing Option selections

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number

This field displays the Booking Request number . This number is allocated by the system and is not unique within each class, i.e. the Facility Class may have Booking Request 1 and the Event Class the next Booking Request Number of 2. (This approach has been taken so that documents generated from the Bookings Module are able to have the same Booking and Payment Reference. Since a Payment Reference must be unique for the Bookings Management module, and to avoid have two numbers, a single number is utilised.) This number is allocated when the Booking Request Maintenance form is accessed. This means that if a user enters Booking Request Maintenance, and then does not save the Request, the Booking Number will have been used and will not be used again.

System Entered Date/Time

This field displays the Date the Booking Request is entered into the system. This value is defaulted by the system and does not allow modification by the user.

Accounting Method

This field allows the user to override the default Accounting Method that would normally be used to process the Booking. The default is sourced from Booking Parameters. The options available from the dropdown are:

- Pathway Debtors
- Cash

> Note: Once a receipt has been allocated against the Booking, the Accounting Method will not be able to be changed.

Booking Source

This field displays the source of the current Booking i.e. Pathway or ePathway.

Invoiced Amount/Amount Owing

This field displays the fee amount for the entire Booking that has been invoiced.

If the Booking Charges are processed in Cash mode the 'Invoiced Amount' field changes to 'Amount Owing'. The Amount Owing is calculated based on the Fee amounts recorded against the Booking, subtracting any Payments received via Receipting.

Outstanding Invoiced Amount/Overpayment Amount

This field displays the Outstanding Invoiced Amount for the entire Booking, i.e. the invoiced amount left to pay. This allows the user to see how much is still due for payment for the booking.

If the Booking Charges are processed in Cash mode the 'Outstanding Invoiced Amount' field changes to 'Overpayment Amount' This field displays any overpayment that is recorded against the Booking.

Receiving Officer

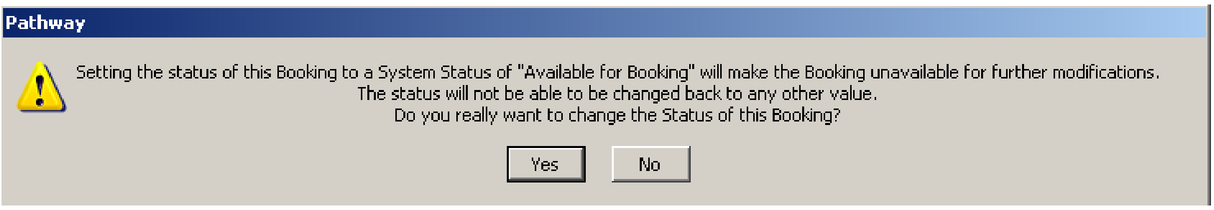
This field displays details of the Officer raising the Request. These details are defaulted by the system and cannot be modified by the user.

Booking Status

These fields allow a Booking Status Code to be keyed in or selected from the Pop Up. The options available for selection are determined by the Status options set up in parameters. The Booking Status which has been set as the default status will default into this field, but may be modified by the user.

Note: If no default Status is set, when a Request is copied, the Status of the original Request will be copied to the new Request.

Note: If the Status field is manually updated to a System Status of 'Available for Booking' the following message will display to warn the user that the current Booking Request will subsequently become unavailable for further modifications:



Activity Type

This field allows the user to select an Activity Type applicable to the booking. This is a mandatory field.

Selecting the Activity Type will determine the Procedure that is loaded against the Booking Request. Where the class has been set to allow fees at the Activity Type the ability to apply a discount will apply to the charges applicable to the Activity Type. The calculation of the time to charge for is based on the elapsed time of the booking, i.e. from the date and time linked to the first booking line, to the date and time of the last booking line.

If the Activity Type is changed against a Booking Request then the following checks and functions will occur.

1. Any non started Tasks will be deleted, and all tasks against the newly selected Activity Type will be applied to the Booking Request.
2. All started and completed Tasks will remain against the Booking Request.
3. All letters generated against the Booking Request will be kept.
4. All Stakeholders will be removed and the Stakeholders associated with the new Activity Type will be added.
5. All Affected Parties will be removed and the Affected Parties associated with the new Activity Type will be added.
6. Any uninvoiced Fees will be removed from the Activity Request.

Activity Sub-Type
These fields only become available to the user once the Activity Type is selected. The Activity Type will determine the list of available Sub Types. The entry of a Sub Type is mandatory.

Activity Fee Discount
When costs are associated to the Request via the Activity Type, the ability to select the Discount Reason against the Request is made available.

Customer Type
The Customer Type is selected from the list of Customer Types defined at the Class level. This is a mandatory field. If there is only one Customer Type defined, this will automatically be defaulted.

Responsible Officer
When a new Booking Request is created, the current user is defaulted into the Responsible Officer field. However, this may be changed. It allows the selection of the user that is responsible for the Request. A Responsible Officer is able to be assigned only where they have access to the class and they have maintenance authority. If a user has access to a Class and only has enquiry access then they are not able to be assigned as the Responsible Officer of the Request.

> Note: When changes are made on a Booking Line or the Activity Type of a Booking Request by a different officer from the one who originally took the Booking, the Responsible Officer does not automatically change. This allows the original allocation of Responsibility to remain on the Booking Request unless manually changed to a different officer. The Default Responsible Officers which can be set up for Activity Types and Facilities are used for assigning a Responsible Officer when a Booking Request is lodged via ePathway.

Activity Name
The Activity Name is a 100 character mandatory field that is the name of the Activity being held, e.g. “Carols in the Domain”. The Activity Name is a searchable field available from the Search Profile. In this way, users are able to use wild card searching to search over the Activity Name. This description will default to the description on each individual Booking Line that is created. However, the user is able to change the description at each Individual Booking Line as required.

Activity Details
This field contains a description of the Booking. This is an optional unlimited text field allowing the user to enter a description of the event as provided by the Customer.

Customer
When a Booking is set to use the Pathway Debtors Accounting System, the user is required to select a single Customer on the Booking Maintenance screen to be used as the Debtor for Invoicing purposes. This field is mandatory and the Name must be a registered Debtor except when the Booking Request is for an Internal Booking.

> Note: If the Booking Request is set to use Cash Invoicing, then the first Customer on the Booking does not need to be a valid Debtor.

> Note: In the smart client the entry of a ‘Customer’ is mandatory only when the Booking Status is changed to ‘Confirmed’.

The Names option against the Booking Request allows the user to add additional Customers if they are required. The selection of the Customer is performed by accessing the Name and Address module. The standard Name Search Profile has been provided to the user. Based on Name and Address security the user is able to create a new name if the name does not exist in the Name and Address module. If the Booking Request is not an Internal Request then there must be at least one Customer linked to the Request.

Once the Customer is selected the Debtor details are determined via the Customer Profile details attached to the name. Where the Customer is not linked to a Debtor, the user will be required to establish a Debtor ID for the customer through Customer Profile.

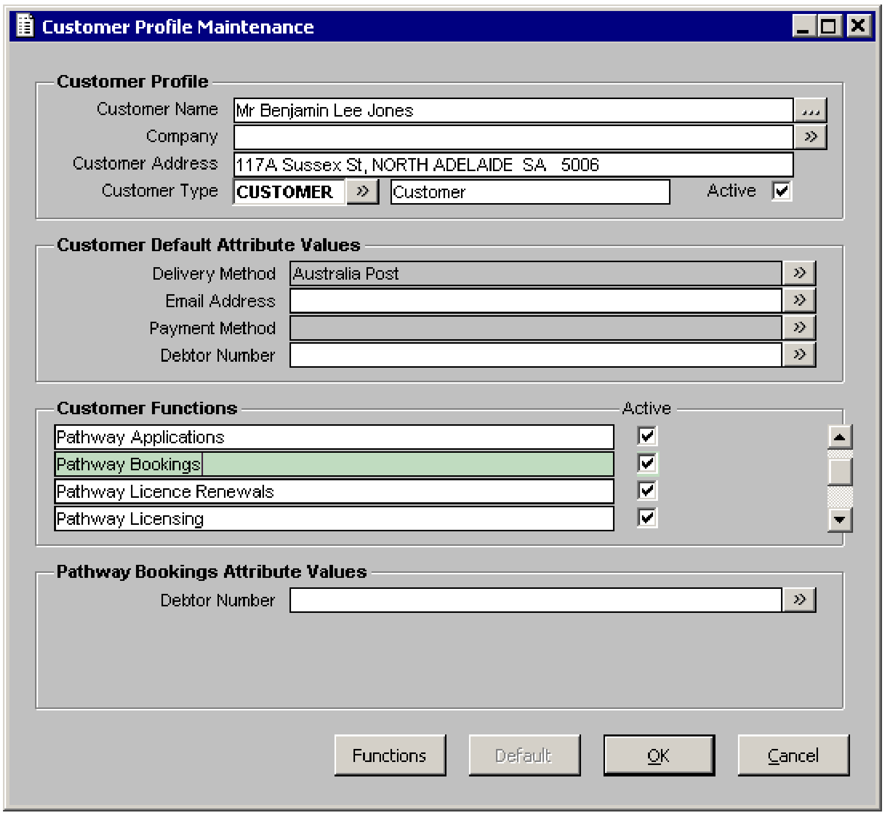
If the Customer has an existing link as a Bookings Debtor, then the name may be keyed in using the surname, a comma, then the first name and then pressing tab.

If the Customer does not have a Debtor Number which is linked to Bookings Management, then keying in the name, then pressing the tab key will display the Customer Profile Maintenance form where a Debtor Number may be set up. The following instructions describe how to set up a Debtor as a Customer (beginning from the Customer Profile Maintenance form):

Note: Invoices/Credit Notes are not able to be raised against a Suspended Debtor, i.e. Debtors with the 'Suspended' flag checked ON in the Debtors module. In this situation, the Booking cannot proceed or be invoiced until a valid Debtor is allocated. A new Debtor may be added via the Name Role Maintenance form as the Customer and moved to the first position. Alternatively, the original suspended Debtor may be deleted (via F11) and a new one added.

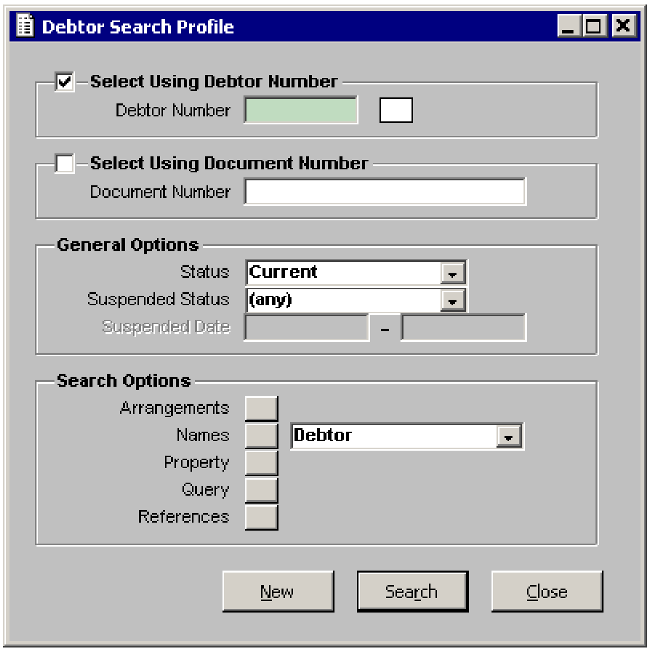
Creation of a Debtor via the Customer Profile Maintenance functions

When entering the details of a new Customer on a Booking, either from Booking Entry or from the Booking Name Role Maintenance forms, you will be presented with the Customer Profile Maintenance form.



Customer Profile Maintenance form

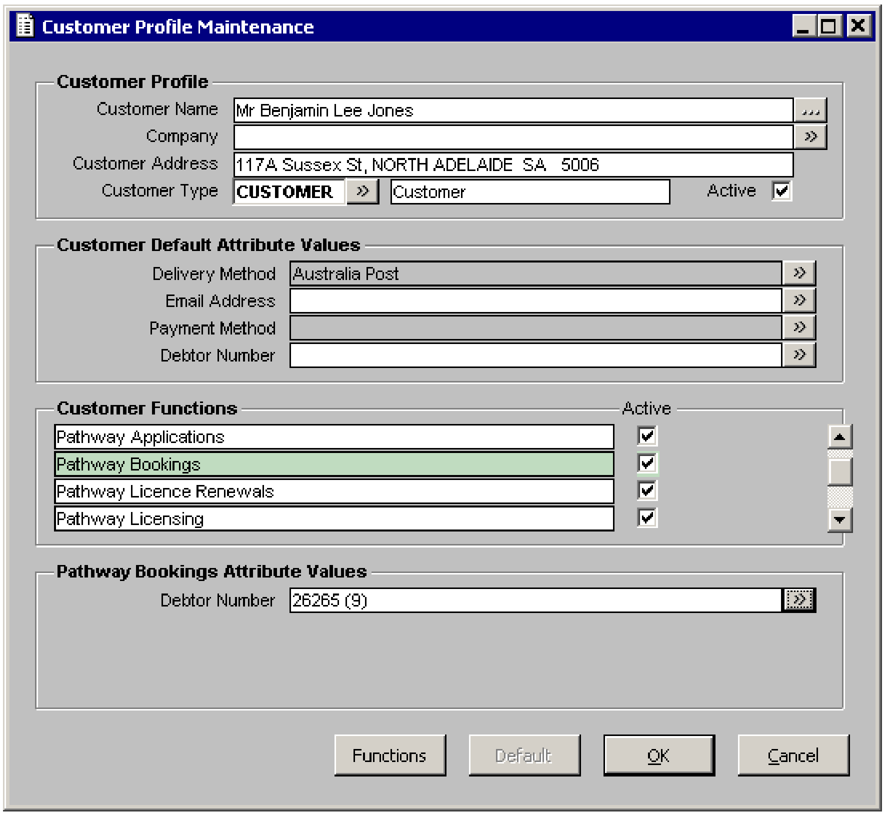
Clicking on the 'Debtor Number' Popup button will display the standard Debtor Search Profile form.



Debtor Search Profile form

You may search for and select a Debtor, or create a New Debtor. It is advisable to perform a search on the Customer Name to ensure there is no existing Debtor record (to avoid creating numerous Debtor links). Click the Names button in the Search Options, enter or select the required Name in the Debtor Name Search Profile and check if a link already exists. If it does, then select the name and it will default into the Debtor Number field

By clicking the "New" button the new Debtor will be automatically created using the Customer Name and Default Debtor Type from the Booking Class. This will return you directly to the Customer Profile form where the new Debtor Id number will be displayed.

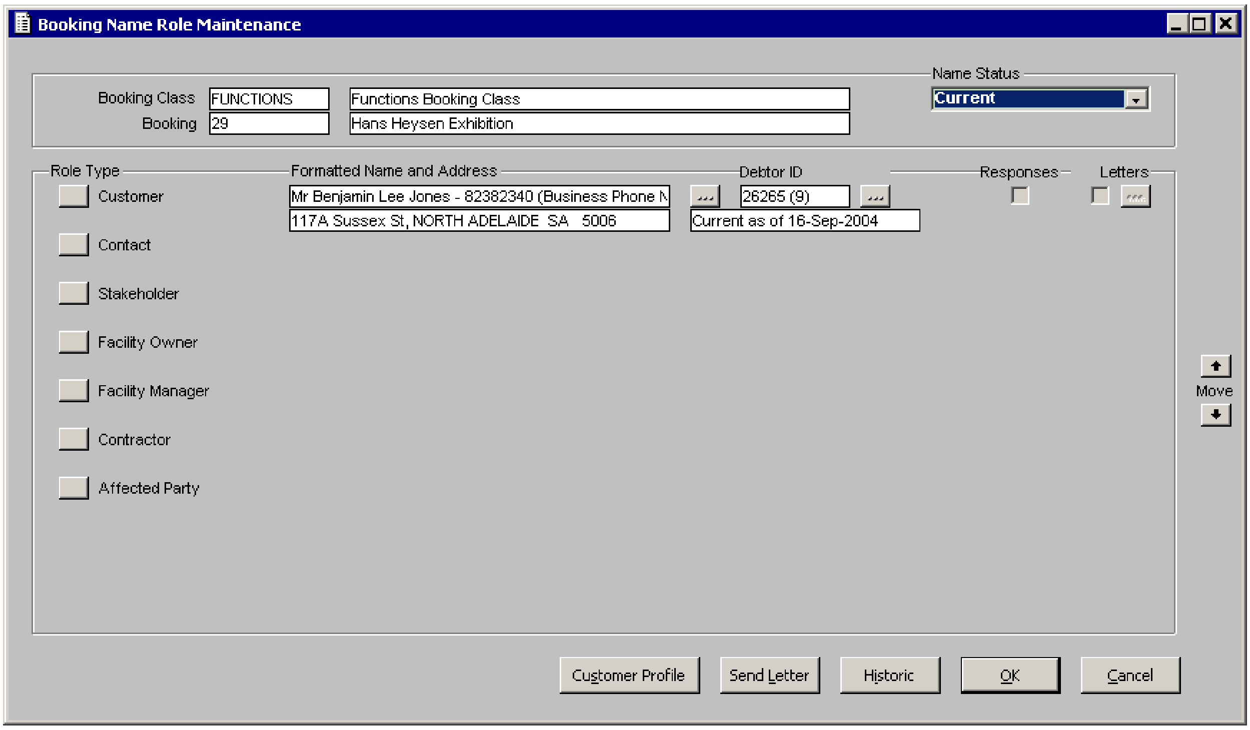


Customer Profile Maintenance form following the creation of a new Debtor

At this point you may press OK (or Cancel), in either case the new Debtor and its associated details have been successfully created.

Note: If a Default Debtor Number is created, then this will be used for all modules. If a Debtor Number is set up specifically for Bookings Management, then it will only be used for this module.

To access the Debtor, you may use the Debtor Maintenance/Enquiry menu functions, or click on the Debtor Id detail button from the Booking Name Role Maintenance form.



Booking Name Role Maintenance form showing the new Debtor Id

The process for creating a Debtor, when no Default Debtor Type has been specified in the Booking Class parameters, is a longer process, involving a greater number of steps. The following procedure needs to be followed:

Creation of a Debtor where no Default Debtor Type is specified.

1. Ensure that the person has the Pathway Bookings Management function assigned. If not, then select the Functions button and assign it.
2. Back in Customer Profile Maintenance, place focus on Pathway Bookings Management
3. In Pathway Bookings Management Attribute Values, detail out on the Debtor Number
4. Select the New button on the Debtor Search Profile form
5. Select the Detail button next to Debtor Names
6. Select the Debtor button in the Names Maintenance form
7. Enter the name in the Debtor – Name Search Profile
8. Select the required name from the Name Selection form and exit the form(s)
9. Back in the Add Debtor form, click OK and a new Debtor number will be assigned to this Name. Take note of this number, and click OK.
10. Return to the Debtor search Profile, and enter the new Debtor Number which has been assigned and perform a search
11. Select the Debtor and return to the Customer Profile Maintenance form where the Debtor Number will default into the Debtor Number field
12. Click OK, and you will be returned to the Bookings Entry form and the Customer Name will display.

Contact

The first listed Contact in the Names option is displayed on the Booking Maintenance screen.

Attendees

This field allows the user to record the number of attendees for the Booking. This is an optional numeric field. If a number is entered here, when a Booking Line is added to the Booking Request, a check will be conducted on the Facility/Sub-Facility selected to ensure that it has the capacity to hold the specified number of Attendees. If the number in this field exceeds the Capacity of the Facility then a warning message is displayed to the user upon leaving the Booking Line, e.g. “The number of Attendees exceeds capacity. The capacity of Facility ‘BR’ is 30.” Note: This is only a warning message and does not prevent the Facility being selected.

Significant Booking

This indicator should be set ON to indicate that the Booking has the potential to interfere with other bookings in the vicinity, i.e. if the Booking is likely to be noisy, cause disruption or restrict access etc, then it should be flagged as a Significant booking to alert potential customers of the situation existing around the required date/time.

This is an On/Off type indicator. By default this field is set to OFF. If the user sets this field to ON then an additional field becomes available called ‘Ward Only’. This is also an On/Off type field and defaults to OFF. If this is set to ON then the Booking will only be displayed against new requests where the requests are in the same Ward. This checking ignores the Class setting and the Requests are displayed across all classes. If ‘Ward Only’ is set to OFF then the Booking will be displayed for all new bookings that are entered regardless of the Ward.

Ward Only

This field becomes available if the Significant Booking field is set to ON. (See Significant Booking) It is an On/Off type field and defaults to OFF. If Ward Only is set to ON then the Booking will only be displayed against new requests where the requests are in the same Ward. This checking ignores the Class setting and the Requests are displayed across all classes. If Ward Only is set to OFF then the Booking will be displayed for all new bookings that are entered regardless of the Ward.

Internal Booking

This is an On/Off type field and is only available if the user has been assigned the security to create Internal Requests. Internal Booking Requests are created to book a Facility for Council purposes such as maintenance, or internal functions and to ensure that the Facility is not booked for other events during those times. By default this value is set OFF and only users with the appropriate authority are able to set it ON.

If a Booking Request is Internal, then Fee Maintenance will not be available. Fees will not be able to be generated and Invoices and Estimates will not be able to be produced. This means that the ‘Fees’ and ‘Fee Summary’ buttons will not be available, as well as the ‘Activity Fees’ option. Resources are able to be assigned.

When an Internal Request is raised, the Customer details are mandatory, however, no check will be made on whether the Customer has a Debtor link.

Recurring Booking

This is an On/Off type field that determines whether the Booking Request is of the “Recurring” type.

When creating a new Booking via ‘Available Facility Selection (Recurrence)’, by default the Recurring Booking flag is checked ON. This ensures that the Booking Lines are linked.

Note: In the Smart client the Recurrence button on the Booking Line grid is enabled only when the ‘Recurring’ flag has been set on.

When ‘Recurrence Pattern Maintenance’ is used to generate Lines for a Booking ***with*** the Recurring Booking checkbox checked **ON**, the checkbox will be dimmed. All of the generated Lines are linked to the same Recurrence Pattern, which can only be accessed in display mode via ‘Recurrence Pattern Enquiry’. However, new Lines can be entered and a different Recurrence Pattern can be specified against these.

When ‘Recurrence Pattern Maintenance’ is used to generate Lines for a Booking ***without*** the recurring Booking checkbox set, the recurrence Pattern is discarded, and the resulting Lines are not linked. (This scenario would be used for generating multiple Booking Lines).

Recurring Bookings are currently the only Bookings eligible for inclusion in batch invoice processing.

See further details on Recurring Bookings and Conflicting Bookings.

Names

The Names Summary box displays all Names linked to a Booking Request together with their associated Role Type, e.g. Contractor. Double clicking or pressing F2 in the summary box displays the Booking Name Role Maintenance form where Name Role Maintenance is able to be performed.

This option allows the user to add and maintain Name roles as required. The Names screen displays all Name links to the user (i.e. Stakeholders, Affected Parties etc) and allow the user to “Historicise” any Name links as required and issue letters using the “Send” button functionality.

An additional Name Role Type is available on the Names form called “Contacts”. This is an optional link that allows the recording of any additional contact names for the Booking. This is useful where the Customer and the Contact for the activity are not the same person.

When the “Customer” Names are displayed, the screen also displays the Debtor linked to the Customer. The user is able to change the Debtor that is linked to the Customer from this screen. The user is able to select or create a Debtor by the Debtor Type. The ability to drill out to Debtor Enquiry, based on appropriate authority, is also available.

Any documents that have been issued against a name link on this screen will be accessible. The user is also able to create documents from this screen to issue to the names linked to the Request.

Fee Summary

The Fee Summary box displays Fee details for the Booking Request and allows the user to access the Fee Summary form to generate transactions and print invoices (Double-clicking in the field or pressing F2).

Fee Charges are broken down into ‘Bond’ and ‘Other’ Charges, e.g.

Activity Fees:	540.00		
Bond:	300.00	Other:	240.00
Facility Fees:		1,450.00	
Bond:	700.00	Other:	750.00
Resource Fees:	382.00		

Location Summary

The Location Summary box displays details of all Street/Suburb and Property Locations associated with the Booking Request. Double-clicking or pressing F2 in the box displays the Location Summary form which allows a more detailed viewing of Location details.

Options – Activity Fees

This is an On/Off indicator which informs the user of any existing Activity Fees. If this flag is set to OFF, then no Activity Fees exist. This option is also available from the Options dropdown menu at the top of the screen. If Activity fees exist for this Booking, then double-clicking on this flag displays the Booking Activity Fee Maintenance form where

Options – Affected Properties

Selecting this option displays the Affected Property Maintenance form.

Options – Conditions

This is an On/Off indicator which informs the user of any existing Conditions. If this flag is set to OFF, then no Conditions exist for the Booking. Clicking this flag displays the Booking Conditions

Maintenance form where Booking conditions may be added or maintained. This option is also available from the Options dropdown menu at the top of the screen.

The ability to add any Conditions applicable to the Booking Request is available. This is in addition to the Conditions that are linked to the Facilities or Activity Types that are linked to the Booking Request.

When a Booking Request is displayed, selection of the Conditions option will list any Conditions that have been applied. The display will list all Facilities that are linked to the Booking and any Conditions that that have been linked to the Facility. The display will list the Activity Type that is linked to the Booking and list any Conditions that have been linked to the Facility. In this way the user will be able to view all the Conditions that are applicable for the Booking Request.

The user is also able to update the Conditions recorded against the Facility for this Request, i.e. The Conditions that are defined against the Facility in Parameters will be automatically loaded against the Facility for the Request. The user will then have the option of adding specific conditions against the Facility for the request. These conditions are dependent on the Request that is being made and the conditions are determined by the Responsible Officer dealing with the case.

Notifiable conditions recorded against the Facility or Request will be displayed whenever the user first enters Request Maintenance.

Options - Customer Service
This is an On/Off indicator which informs the user of any existing Customer Service Requests. If this flag is set to OFF, then no Customer Service Requests exist. Clicking the flag displays the Linked Request Selection form where Customer Service Requests may be linked, maintained or simply viewed. The Customer Service option is also available from the Options dropdown menu at the top of the screen. See additional details in the section on Linking to Customer Service.

Options – Documents
This is an On/Off indicator which informs the user of any existing Documents. If this flag is set to OFF, then no Documents exist for the Booking. Clicking this flag displays the Document Maintenance Merge Class Selection form where new documents may be created or existing ones maintained. New Documents may be created via the Letters button, however the remaining buttons on this form only allow viewing of the documents as these documents are not created here but through the Fees Maintenance process. The Documents option is also available from the Options dropdown menu at the top of the screen.

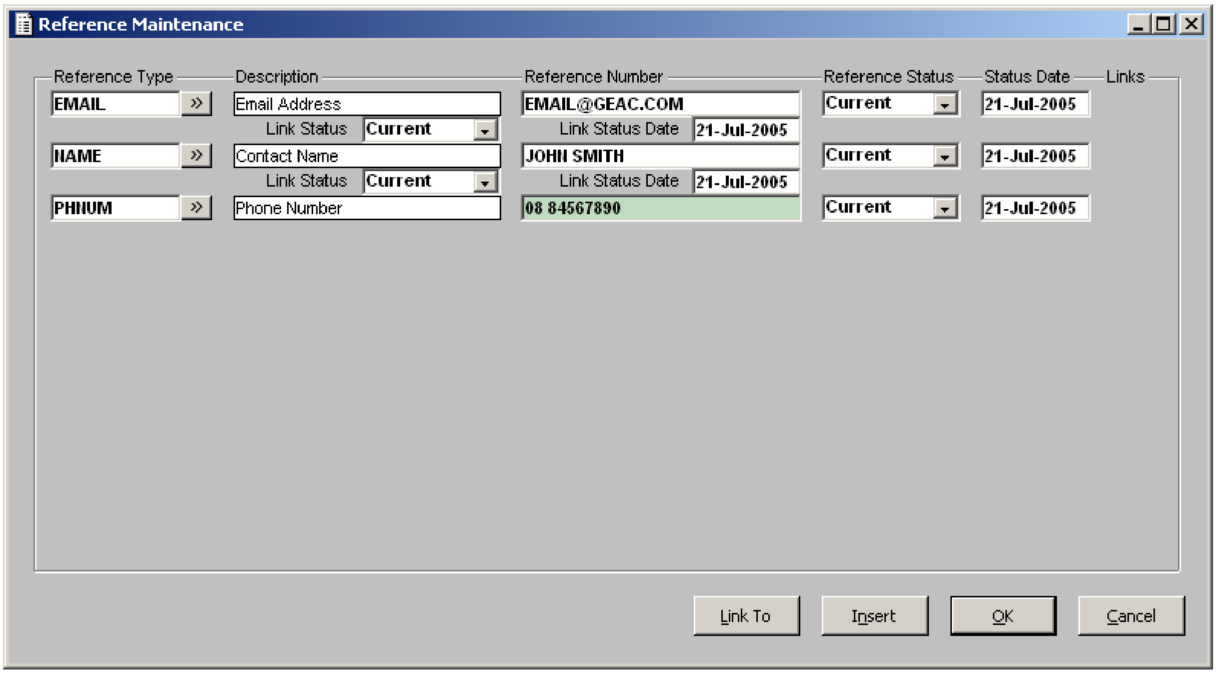
Options – External Activities
This option is only available from the Options dropdown menu. When this is selected and External Activities exist for the specified period then the External Activity form displays listing all occurrences along with details and dates.

Options – Notes
This is an On/Off indicator which informs the user of any existing Notes. If this flag is set to OFF, then no Notes exist for the Booking. Clicking this flag displays the Booking Note Selection form where new Notes may be created or existing ones maintained. This option is also available from the Options dropdown menu at the top of the screen.

Options – References
This is an ON/OFF indicator which informs the user of any existing References on the Booking. If this flag is set to OFF, then no References exist for the Booking. Clicking this indictor displays the Reference Maintenance form where new References may be added or existing ones maintained. This option is also available from the Options dropdown menu at the top of the screen.

The following form displays when the user wishes to create or maintain References within a Booking. Three Booking Class Reference Types are available representing Name, Email and Contact Number. Users are able to maintain these manually in Pathway and ePathway will automatically update this information as Bookings are processed online. These References are especially useful in ePathway to store the Name, email address and Phone Number details of a web user..

See further details in section on Reference Types



Reference Maintenance form

Options – Responses

This is an On/Off indicator which informs the user of any existing Responses. If this flag is set to OFF, then no Responses exist for the Booking. Clicking this flag displays the Response Maintenance form where new Responses may be created or existing ones maintained. This option is also available from the Options dropdown menu at the top of the screen.

Options – Significant Bookings

Selecting the Significant Bookings Option from the Options dropdown menu displays the Significant Booking Enquiry form, if any Significant Bookings exist. This form displays all Significant Bookings that may affect the current Booking. Selection of the Detail button displays the Booking Request pertaining to the Significant Booking. If none are applicable to the current Booking, then a message will display.

Options – Workflow

This is an On/Off indicator which informs the user of any existing Workflow Tasks. If this flag is set to OFF, then no Tasks exist for the Booking. Clicking this flag displays the Task Summary form where new Tasks may be added or existing ones maintained. This option is also available from the Options dropdown menu at the top of the screen.

Booking Line - Booking Date

Enter a date or select one from the Calendar Pop Up (by pressing F2 or double-clicking in the field) which is to be the date on which the Booking will occur.

If a clash in Date/Time or Facility is detected when leaving this field, an error message will display to the user indicating that there is a clash with another Booking and giving details of the clash. The Booking Line Status will then change to' Conflicting'. The following is an example of the message which displays:

> "There is a conflicting Booking for the selected Facility or an 'Autobooked' Sub-Facility.
> Another Booking exists from 08:00:00 to 12:00:00 on Booking Number 99.
> The requested Booking cannot be accepted."

Booking Line - Start Time/End Time

These fields allow a start and end time for the Booking to be keyed in, in 24 hour format., e.g.08:00 – 15:00.

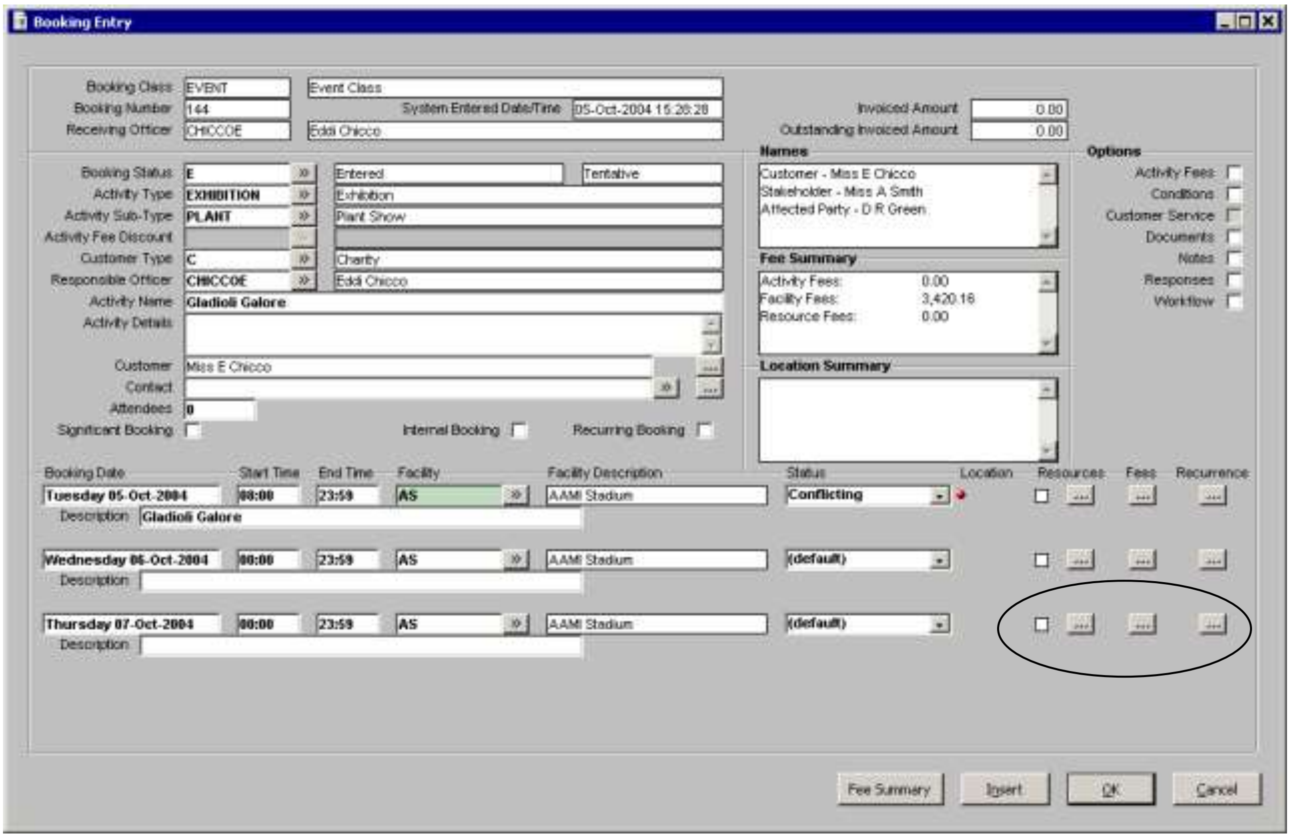
Examples:

- An evening Booking which is to extend until midnight would be entered as follows: 19:00 – 23:59.
- A Booking from midnight to 3 am would be entered as follows: 00:00 – 03:00.
- Two Bookings on the same day following on from each other would be entered as follows:
  Booking 1: 08:00 – 13:00
  Booking 2: 13:00 – 17:00

> Note: Because a 24 hour clock is being used, 'Midnight' must be indicated by using 23:59. However, when calculating duration values, the system will assume 23:59 to be midnight and will add an additional minute to the calculation.

If a clash in Date/Time or Facility is detected when leaving this field, an error message will display to the user indicating that there is a clash with another Booking and giving details of the clash. The Booking Line Status will then change to' Conflicting'. The following is an example of the message which displays:

"There is a conflicting Booking for the selected Facility or an 'Autobooked' Sub-Facility.
Another Booking exists from 08:00:00 to 12:00:00 on Booking Number 99.
The requested Booking cannot be accepted."

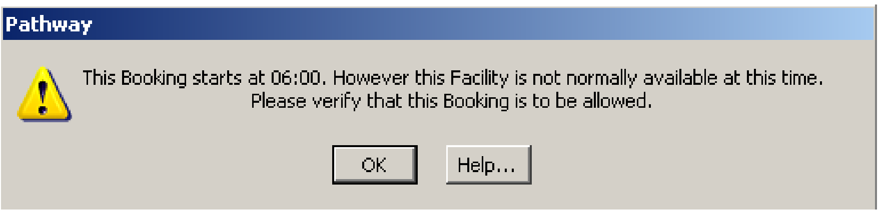


Booking Entry form showing a Booking Line with 'Conflicting' Status

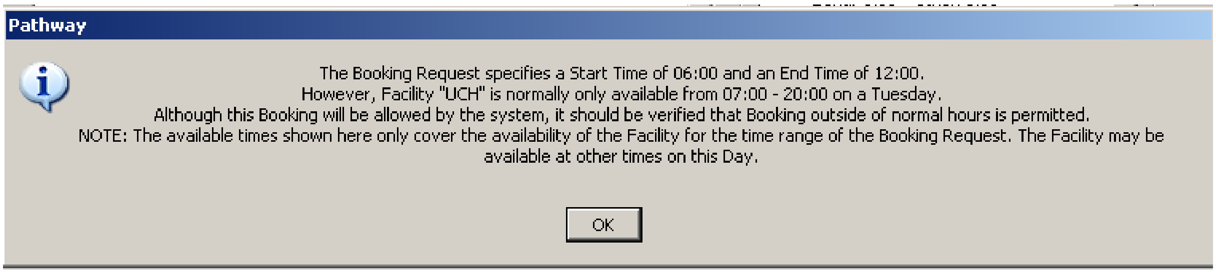
Booking Times outside of Facility Open Hours
When making a Booking Request where the Start Time or End Time of the Booking is earlier or later than the available times of the Facility, the Booking is allowed by the system, but a warning message informing the user of the normal availability of the Facility is displayed when this situation occurs.

Example: The Facility is open between 7:00 and 20:00 hours.
Booking Times: 6:00 to 11:00 Allowed with warning message.
Booking Times: 8:00 to 21:00 Allowed with warning message
Booking Times: 6:00 to 21:00 Allowed with warning message

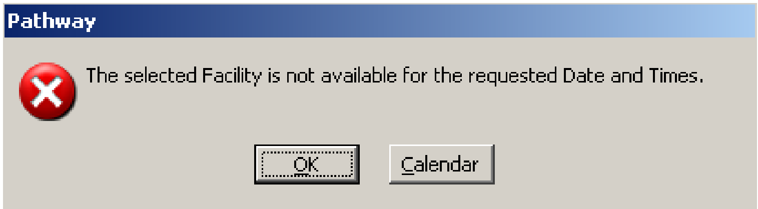
Booking Times: 5:00 to 6:00 Not allowed, set to Conflicting
Booking Times: 21:00 to 23:00 Not allowed, set to Conflicting



Clicking the Help button displays further information, as follows.



If both the Booking Start and End times are either earlier or later than the normal available times for the Facility, an error message will display and the Booking Line will be set to 'Conflicting'.



The Weekly Calendar may be accessed (if available) to allow the user to select a different time within the Facility's available time range. The 'Book' button may then be selected if the user wishes to book a different time. The following message will display to ascertain whether the user wishes to update the current Booking Line with the new information or create new Booking Lines.

Booking Line – Facility
A Facility Code may be keyed into this field or one may be selected from the Pop Up from the available Facilities.

This field allows a Facility or Sub-Facility to be selected for the Booking. Selecting the Facility will perform a check on the Facility Availability Times that have been defined. If the booking is being made outside the Available times then an error will be displayed to the user and either the booking time will need to be changed or a new facility will have to be entered. Selecting the Facility also invokes the following additional checks.

- Availability of the sub facilities (if auto book on the sub facilities has been set on)
- Notification/Display of any Bookings in other linked sub-facilities.
- Display of any Significant Bookings
- Display of any External Activities

- Display of any Notifiable conditions against the Facility

In addition, a check is made on the Facility's 'Allow Multiple Bookings' setting. The following rules are implemented when determining if a Facility is free for booking:

- When a Facility and/or Sub-Facility is set to 'allow multiple bookings', the system will allow the user to make multiple bookings for the same dates and times but will warn the user about the other bookings.

- Clashes with Resource Bookings are not allowed regardless of the setting of the *Allow Multiple Bookings* flag against the relevant Facility, since Resources are not the sorts of things two groups can share at once.

- In Booking Line Street/Suburb Maintenance, adding a Street/Suburb Location for which a conflicting Booking exists is only allowed if both the current Line's Facility and the conflicting Line's Facility are "multi-book".

- In Booking Maintenance, when maintaining a Line where the relevant Facility is "multi-book":

    - If the Line has Locations, a clashing Street/Suburb Booking is not allowed unless the relevant Facility is also "multi-book".

    - If the Facility is an "Autobook" Sub-Facility, the Line is only allowed to clash with a Booking at the parent level if the parent Facility is also "multi-book".

    - If the Facility is a parent Facility:
        - The Line is only allowed to clash with another Booking for the parent if all of the "Autobook" Sub-Facilities are also "multi-book".
        - The Line is only allowed to clash with a Booking for an "Autobook" Sub-Facility if the Sub-Facility is also "multi-book".

    - Otherwise, if the Facility is neither a parent nor an "Autobook" Sub-Facility, the Line is allowed regardless of clashes

An indicator check box has been added alongside the Facility Description to show when a Facility has its 'Allow Multiple Bookings' flag set on. This will help the user identify those Facilities or Sub-Facilities that can have multiple Bookings. (Note that due to space restrictions there is no label Heading for the check box, but if the user hovers their mouse cursor over this check box field a Tool Tip description, 'Allow Multiple Bookings' will be shown.)

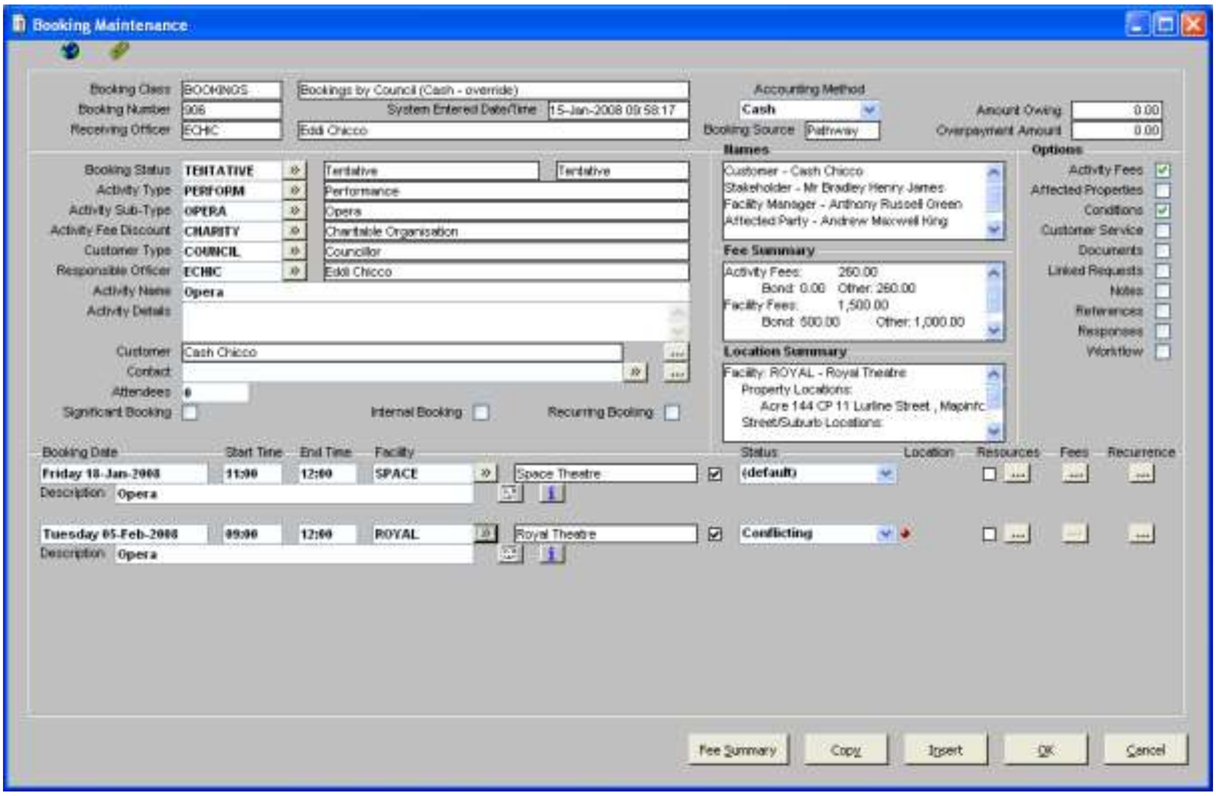
Once the Facility has been selected the user is able to view the Fees and assign resources accordingly.

Note: If a Parent Facility is booked causing the sub-facilities to be automatically booked (due to the Auto Book flag being set ON in parameters), then costs will be derived from the Parent Facility only. Costs associated with the separate hire of the sub-facilities will not be included in the booking.

If a clash in Date/Time or Facility is detected when leaving this field, an error message will display to the user indicating that there is a clash with another Booking and giving details of the clash. The Booking Line Status will then change to' Conflicting'. The following is an example of the message which displays:

> "There is a conflicting Booking for the selected Facility or an 'Autobooked' Sub-Facility.
> Another Booking exists from 08:00:00 to 12:00:00 on Booking Number 99.
> The requested Booking cannot be accepted."

See also Booking Times outside of Facility Open Hours



Booking Entry form showing a Booking Line with 'Conflicting' Status

Allow Multiple Bookings Glyph ☑

This glyph will display alongside the Facility Description to indicate the value of the 'Allow Multiple Bookings' flag for the Facility.

Booking Line - Status

Select a Booking Status from the dropdown selection. The following options are available for selection:

- (default) — This means that the Booking Line has the same system status as that of the Request.
- Awaiting Response — This means that the Booking has been made and details issued to the customer. The customer will be providing further details.
- Confirmed — This indicates that the Booking Line has been confirmed.
- Cancelled — This means that the Booking Line has been cancelled, and therefore the time is available for another Booking.
- Declined — This represents a Booking Line that a customer has declined to take. The time is available for another Booking.
- Tentative — This represents a Booking Line that has been made, and not yet confirmed.
- Conflicting — Booking Lines are set to a 'Conflicting' Status during the Recurring Booking generation process, if the Booking Date/Time/Facility clashes with another Booking, i.e. users cannot manually set a Line to this Status.

  Additionally, when a Booking Line is being entered, and there is a conflict with another Booking Line (where the Facility is not 'multi-book'), then a message will display informing the user of the conflict and the Status of the Booking Line will be set to 'Conflicting'. This Status can subsequently ONLY be changed to 'Declined' or 'Cancelled', unless changes are made to the selection of a Date/Time or Facility to avoid any conflict. Once the area of conflict has been resolved, the Booking Line Status will automatically change back to (default) and will be modifiable to any Status by the user.

See also Booking Times outside of Facility Open Hours

> Note: If a Booking Line has a Status of 'Confirmed', then it is available for Invoicing. All other statuses preclude the ability to be invoiced.

Booking Line - Location
If a Facility which is a General Purpose Facility has been selected for a Booking Line, then a Location Detail button will become available which enables the user to associate a Street/Suburb to the Booking Line. Selection of the Location Detail button displays the Booking Line Street/Suburb Maintenance form where a Street/Suburb may be selected.

Selection of a Location is mandatory before the Recurrence button can be selected to generate Recurring Bookings.

Booking Line - Resources
Selection of the Resources button displays the Booking Line Resource Selection form where Resources may be assigned from the available Facility Resources.

Booking Line - Fees
Selection of the Fees button displays the Booking Line Fee Maintenance form where the associated fees may be viewed and maintained for the Booking Line. If there are no Fees which have been uploaded from the Facility a message 'No occurrences match the search profile' will display.

Booking Line - Recurrence
Selection of the Recurrence button displays the Recurrence Pattern Maintenance form where details may be set up for Recurring Bookings.

See further details on Recurring Bookings, Conflicting Bookings and Booking Line Processing.

> Note: If the Booking Line is for a General Purpose Facility, then a Location must be entered before selecting the Recurrence button.

Booking Line - Reference
The Reference field displays the Booking Line Reference Number which is allocated to the Booking Line by the system. This field is display only and cannot be maintained.

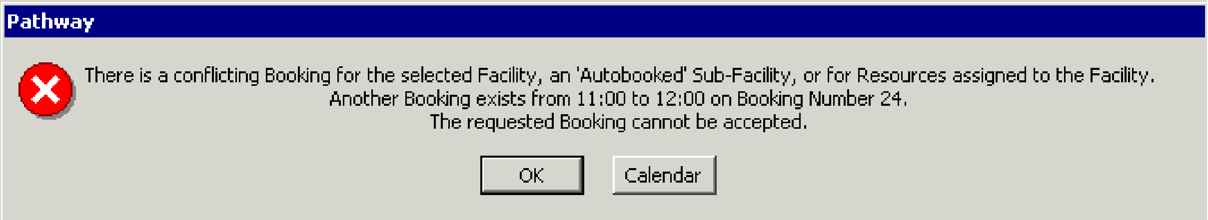
Booking Line - Description
The Description field allows the user to enter a meaningful description for the Booking Line for identification purposes. Initially, when a new Booking Request is created, the Activity Name will default into the Description field as each individual Booking Line is created. However, the user is able to change this Description as required.

Booking Line – Calendar Button
Clicking on the Calendar Button on a Booking Line will display the 'default' Calendar View. Where both Calendars are available, this will normally be the Weekly Calendar. However, this can be overridden by setting a parameter on the Booking Class, in which case, the Monthly Calendar will display by default.

The Calendar Button can be used at any time, even on a new (i.e. blank) Booking Line. However, if some data already exists on the Booking Line, the Calendar will use that as its starting point. If there is no Date on the Booking Line then the Calendar will assume 'Today'.

From the Calendar it is possible to select time blocks and click on the 'Book' button. In this case the selected data will be returned to Booking Entry and give the user the opportunity to either update the existing Booking Line, or to create new Booking Lines. Note that if multiple selections are made then the first selection can be used to update the Booking Line whilst the additional selections will create new Booking Lines as necessary.

Whenever a conflict exists, Booking Entry will provide access to the Calendar to allow the user to see where the conflict lies. A message box similar to the following will display:

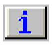


If the user selects an alternative time block from the Calendar, where no conflict exists, then the Booking Line can be updated with the new details as provided by the Calendar.

Note: The ability to update the Booking Line with data from the Calendar is only available where the Calendar has been called directly from Booking Entry. Where a Resource conflict occurs, for example, it is possible to go to the Calendar from the message nut the 'Book' button will not be available in this case.

For more details see Bookings Weekly Calendar and Bookings Monthly Calendar.

Booking Line - Information Button

The Information Button  will display if there are any 'Related Bookings' occurring at the same time or on the same day for Facilities which allow Multiple Bookings. If no 'Related Bookings' exist, this button will not display.

Selection of this button will display the Related Bookings Enquiry form showing any Bookings or Activities which are likely to impact on the current Booking.

The display of the 'Information' icon and button is conditioned by the existence of any other Related Booking or Activity on the same day as the Booking in question. This means that when entering a Booking a warning message will be shown when any Related Booking or Activity occurs at the same time as the Booking in question, but the 'Information' icon will be shown whenever a Related Booking occurs on that **same day**. This expansion of the display of the 'Information' icon and button extends to the Available Facilities Search and the various Calendars.

Booking Line - Decline/Cancel Reason

A Decline/Cancel Reason Code *must* be keyed into this field or a selection made from the Pop Up if the Booking Line Status is set to 'Cancelled' or 'Declined'. These fields become available when a Declined or Cancelled Status is selected for the Booking Line. When this occurs, all other fields on the Booking Line become dimmed.

Fee Summary Button

Selection of the Fee Summary Button displays the Booking Fee Summary form where Charge Lines for the Booking may be invoiced.

Copy Button

The Copy button allows the user to "Copy" the Booking Request. The Copy function creates a new Request and copies the following details from the original Request to the new one:

- Responsible Officer
- Activity Type
- Activity sub-Type
- Activity Name
- Activity Details
- Customer Type
- Number of Attendees
- Significant Booking Flag

The following details are set by the Copy process:

- Receiving Officer is set to the user performing the ‘Copy’ of the Request
- Entered Date is set to the current system date

The options available to be copied are:

- Customer Details
- Stakeholder Details
- Affected Party Details
- Contact Details
- Notes – selectable by Note Type
- Conditions

If ’Role Types’ are selected, then all Roles of the selected Role Types e.g. Customer, Contact etc will be copied from the original Booking. These details will display in the ‘Names’ Summary box.

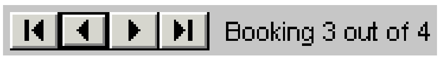
The ‘Conditions’ option will be checked ON if any Booking Conditions have been copied over from the original Booking.

If any ‘Note Types’ are selected, then all Notes of the selected Note Type will be copied from the original Booking.

Clicking the Copy button will display the Copy Options form.

When a Request has been copied, the user is given the ability to link the copied Request to the original Request. However, further linking options are available through the ‘Linked Requests’ option.

When the Request is saved, the navigation buttons display in the bottom left hand corner of the form to allow the user to navigate between the new and the original Booking Requests. If the Copy Button is selected again from the new Booking Request and the new Request is linked to it, then the Navigation Buttons will allow the user to navigate between all 3 Requests.



Note: If multiple Bookings are selected and maintained using ‘multi-select’ and one of these Bookings is copied, then the new booking will be added to the end of the selected bookings. The total number of Booking displayed on the navigation buttons increases by 1, and all may be accessed via the navigation buttons.

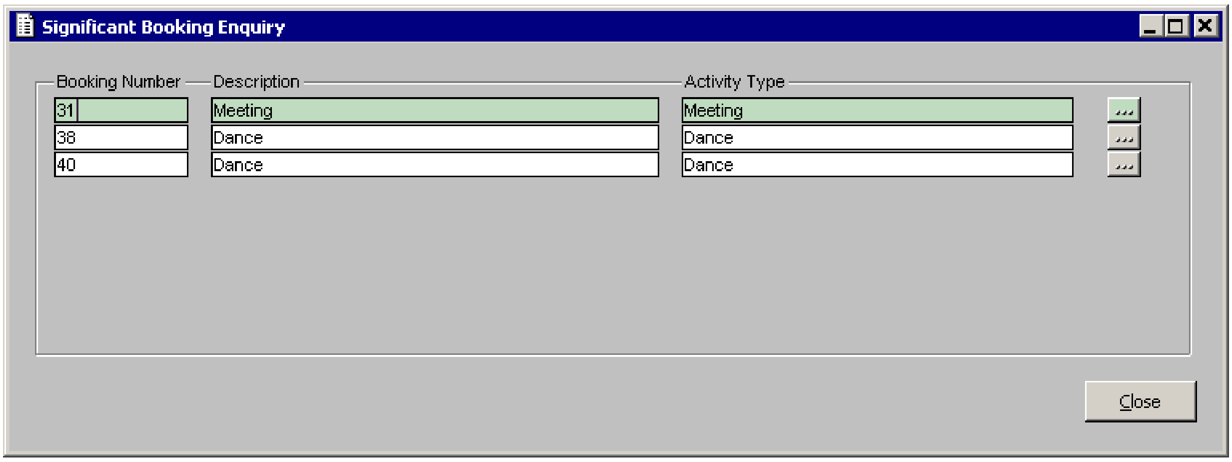
The Copy button will not display on ‘Cancelled’ Booking Requests, i.e. with a Status of ‘Available for Booking’.

Significant Booking Enquiry Form

The Significant Booking Enquiry form displays when the Significant Bookings Option is selected from the Options menu on a Booking Request. It displays all occurrences that have the potential to disrupt or interfere with the current Booking.

The Detail Buttons alongside each occurrence allows the user to view the details of the Significant Bookings.

Note: Access to all Booking Classes has been made available for this purpose irrespective of the user's security level.



Significant Booking Enquiry form

Booking Number/Description

These fields display the Booking Number and Description of any Bookings which have been flagged as Significant Bookings and will occur in the same area as the current Booking Request/Line and may cause an interference.

Activity Type

This field displays the Activity Type related to the Significant Booking, e.g. Concert.

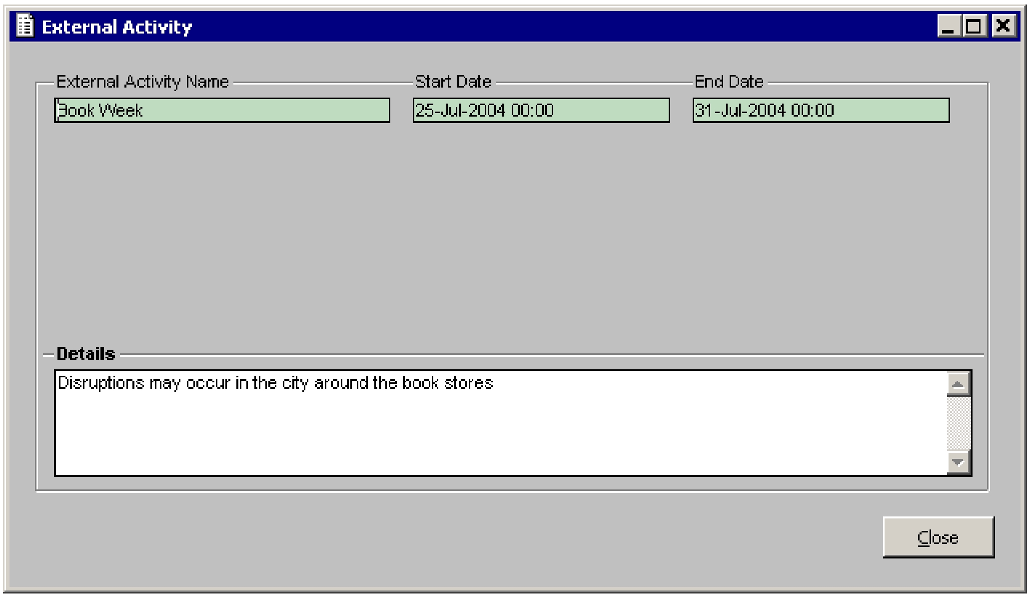
Detail Button

Selecting the Detail button displays the Booking Enquiry form to allow the user to view the Booking Request record for the Significant Booking.

Note: Access to all Booking Classes has been made available for this purpose irrespective of the user's security level.

External Activity Form

The External Activity form displays when the External Activity Option is selected from the Options Menu on the Booking Maintenance form, when External Activities exist which may affect the current Booking Request.



External Activity form

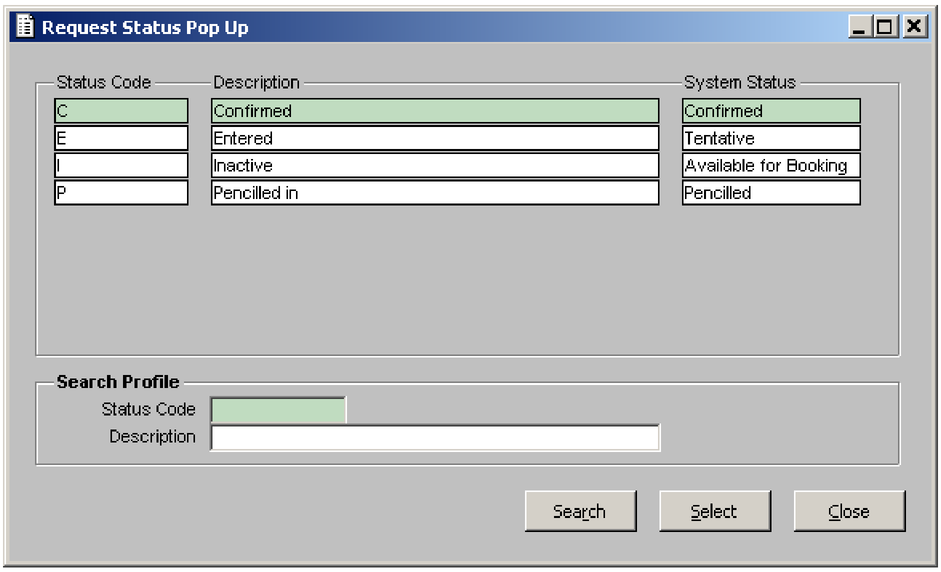
External Activity Name
The External Activity Name field displays the name of any External Activity which may affect the current Booking.

Start Date/End Date
These fields display the actual start and end dates pertaining to the External Activity.

Details
The Details field displays other details related to the External Activity. This field may be zoomed by double-clicking or pressing F2 in the field.

Request Status Pop Up Form

The Request Status Pop Up displays when the Pop Up button is selected at the Booking Status field on the Booking Entry/Maintenance form. It allows a Booking Status to be selected from the available Status Codes.



Request Status Pop Up Form

Status Code/Description
These fields display details of the Status Code and description.

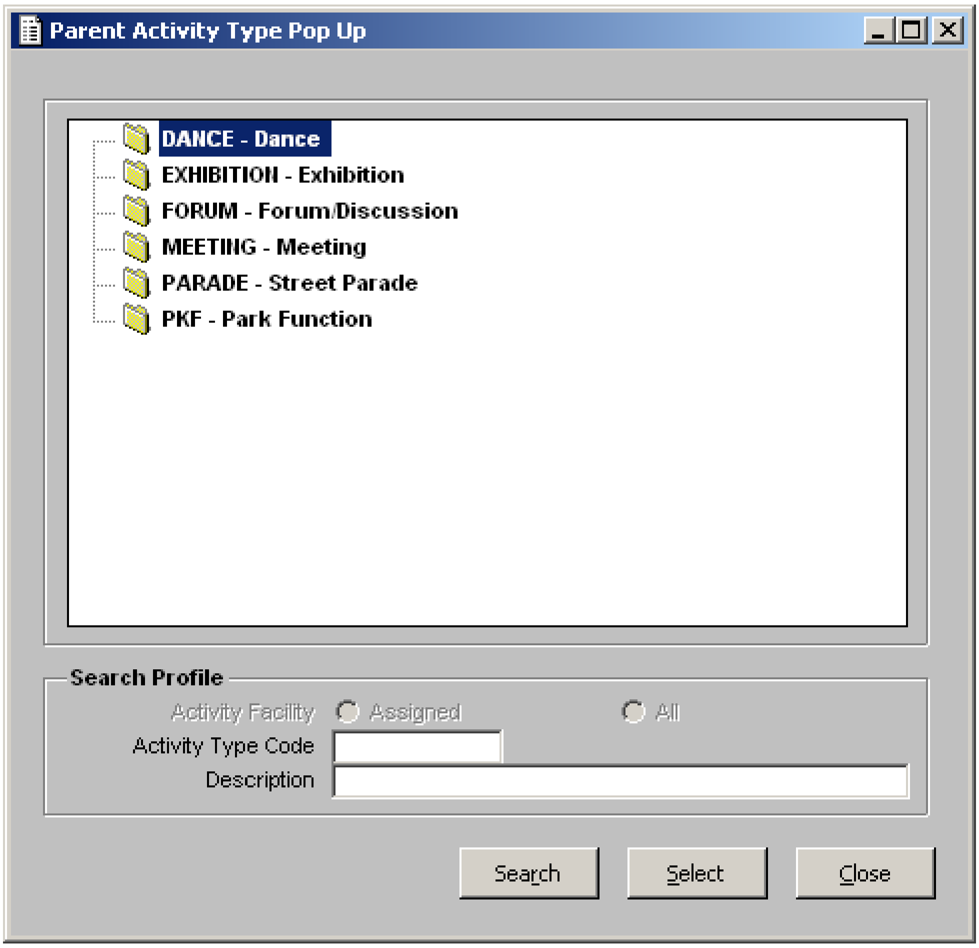
System Status
The System Status field displays the System Status allocated to the User-defined Status Code. The available options are:

- Confirmed
- Tentative
- Pencilled
- Available for Booking

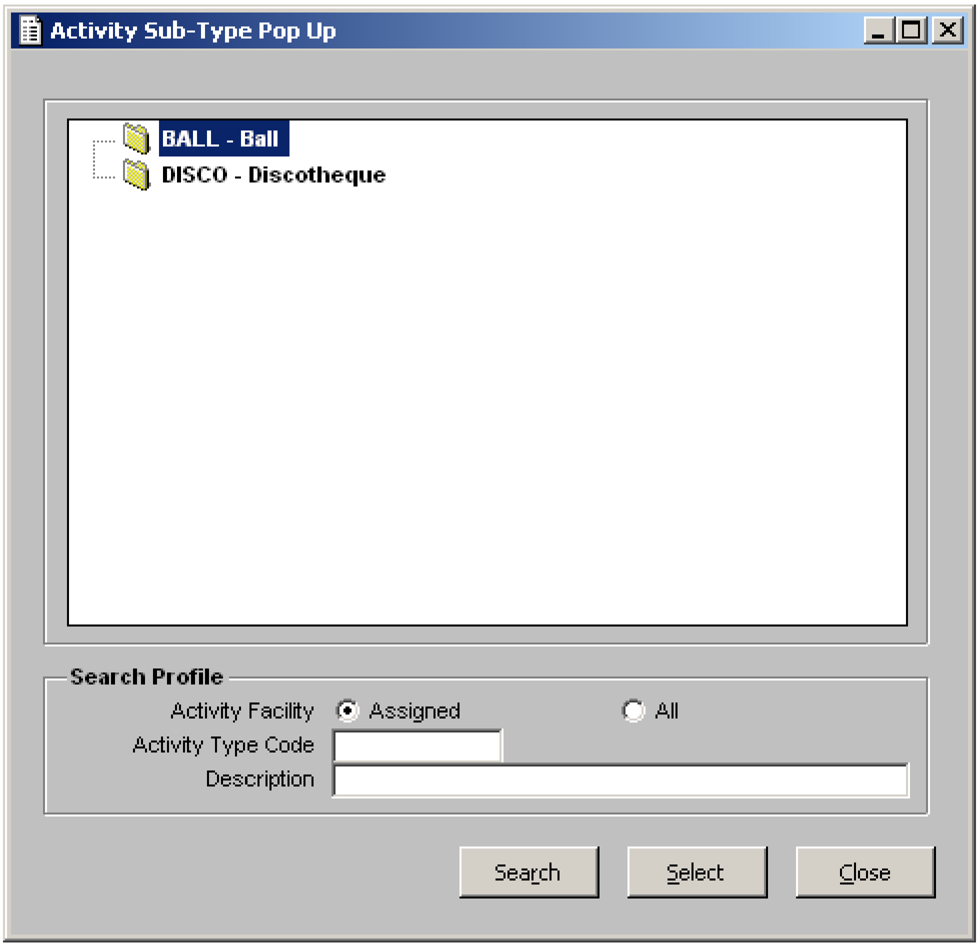
Search Profile – Status Code/Description
The Search Profile fields allow a Status Code and/or description to be keyed in as a search profile.

Parent Activity Type Pop Up Form

The Parent Activity Type Pop Up displays when the Activity Type Pop Up button is selected on the Booking Entry/Maintenance form. It allows a Parent Activity Type to be selected.



Parent Activity Type Pop Up form



Activity Sub-Type Pop Up form

Activity/Activity Sub Type

This box displays the Activity Types or Activity Sub-Types available for selection in a tree-like structure. When called from the Booking Maintenance form, the display of Activity Sub-Types may be filtered by an associated Facility if one has already been nominated on the first Booking Line. In this case, the Activity Facility search option will be set to 'Assigned'. Changing this to 'All' will display all the available Activity Sub-Types.

Search Profile – Activity Facility

If a Facility with associated Activity Sub-Types has been specified on a Booking Line, and the Activity Sub-Type Pop Up is invoked, then, by default, the results will be filtered by the associated Activity Sub-Types. In this case this field will be set to 'Assigned'. The user may control this list with the radio buttons and display 'All' the Activity Sub-Types if desired.

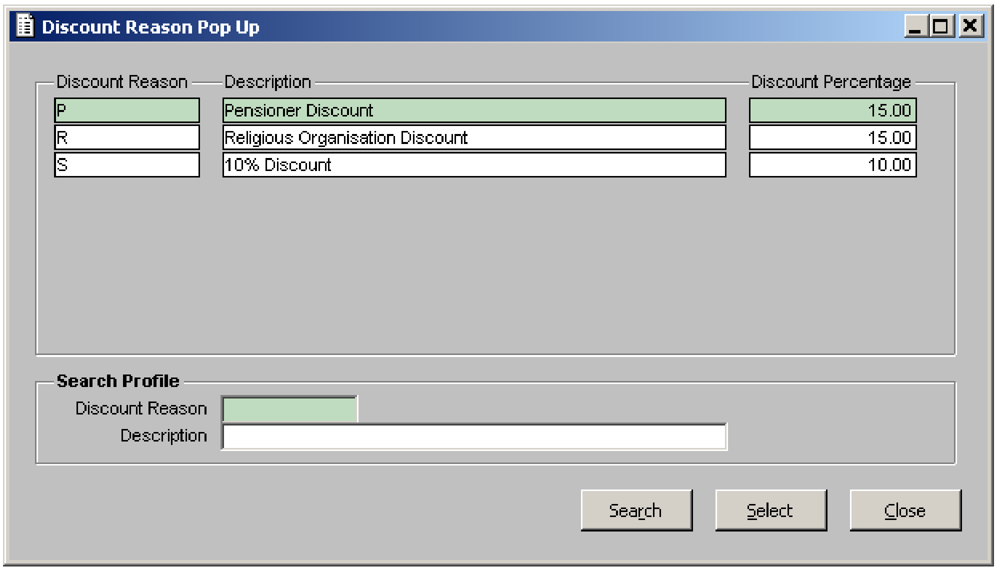
Note: This filter is not available in the Parent Activity Type Pop Up (and will be dimmed) as Parent Activity Types cannot be associated to Facilities.

Search Profile – Activity Type Code/Description

Enter an Activity Type Code and/or Description on which to base your search and then select the Search button.

Discount Reason Pop Up Form

The Discount Reason Pop Up form displays when the Pop Up button is selected at the Discount Reason field on the Booking Line fee Maintenance form. It allows a Discount Reason Code to be selected to apply to the Booking Fees.



Discount Reason Pop Up Form

Discount Reason/Description

These fields display the Discount Reason Codes and Descriptions which have been set up in parameters.

Discount Percentage

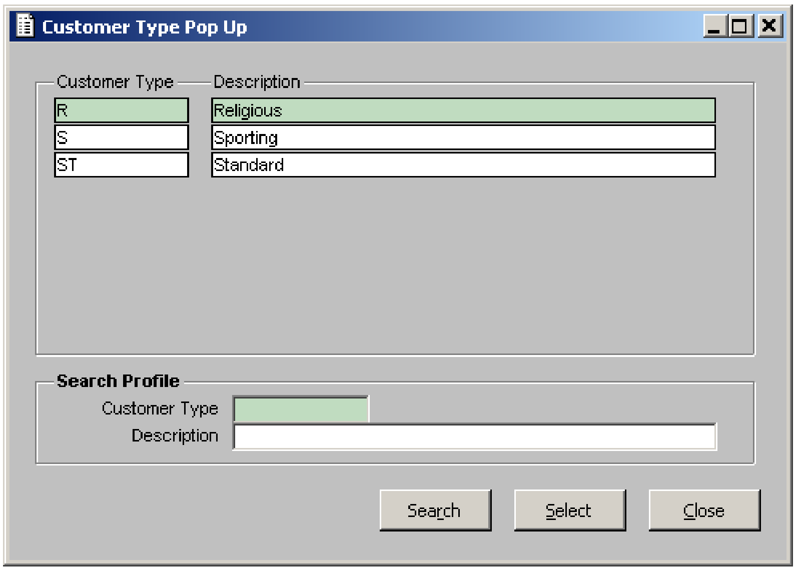
The discount Percentage field displays a percentage figure which is associated to the Discount Reason Code. If selected, this percentage is applied to the selected Booking Fees.

Search Profile – Discount Reason/Description

Enter a Discount Reason Code and/or Description on which to base your search and then select the Search button.

Customer Type Pop Up Form

The Customer Type Pop Up form displays when the Pop Up button is selected at the Customer Type field on the Booking Entry/Maintenance form. It allows selection of a Customer Type to be specified on a Booking Request.



Customer Type Pop Up Form

Customer Type/Description

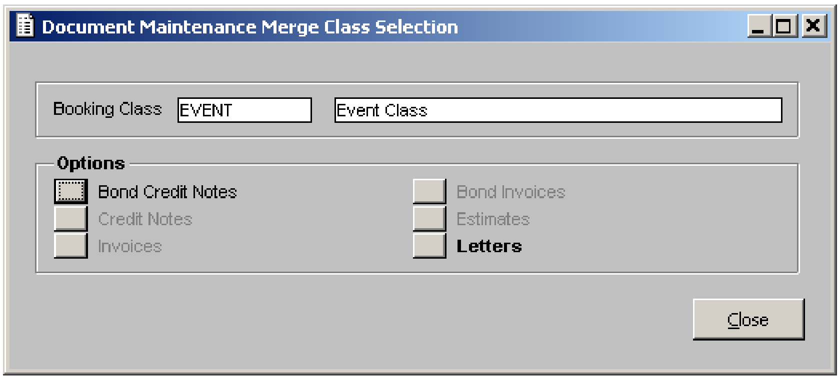
These fields display the various Customer Type Codes and Descriptions which have been set up in parameters.

Search Profile – Customer Type/Description

Enter a Customer Type Code and/or Description on which to base your search and then select the Search button.

Document Maintenance Merge Class Selection Form

This form allows the user to select a Document Class e.g. Invoices, for the generation of documents of a particular Class or to display existing documents. Only Letters are available for maintenance from this form. The other form of documents e.g. Bond Credit Notes, Invoices etc are generated via the Fee Summary process and may only be viewed from this form.



Document Maintenance Merge Class Selection Form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

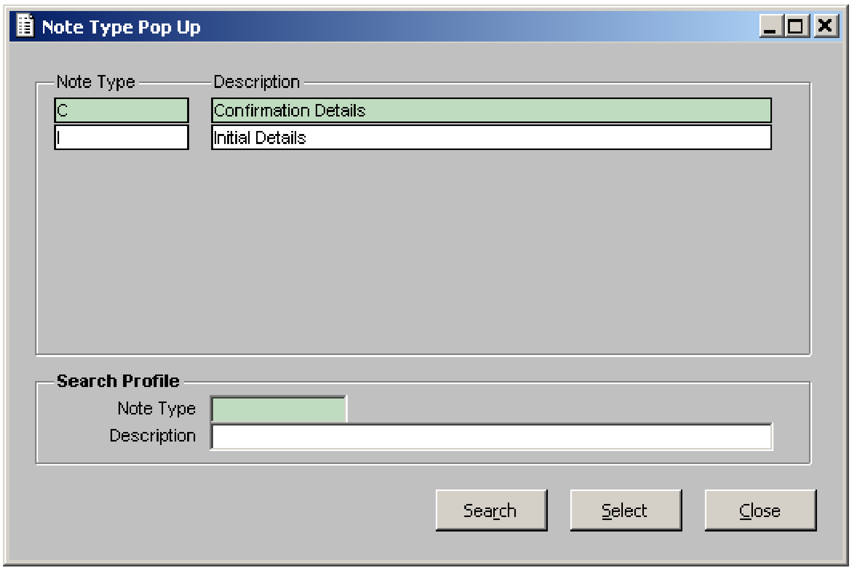
Options Buttons

The Options buttons allow different Classes of Merge Types to be used for the generation of documents, e.g. selection of the Letters Option button will display a selection of Letters which have been generated, and will also allow the creation of new Letters.

Note: Only the Letters Option will allow documents to be created from this screen. All other options will be generated from within the Fees area, and will only be able to be displayed from here.

Note Type Pop Up

This form allows the user to select a Note Type from the list of existing Note Types created for this Booking Class.



Note Type Pop Up

Note Type/Description

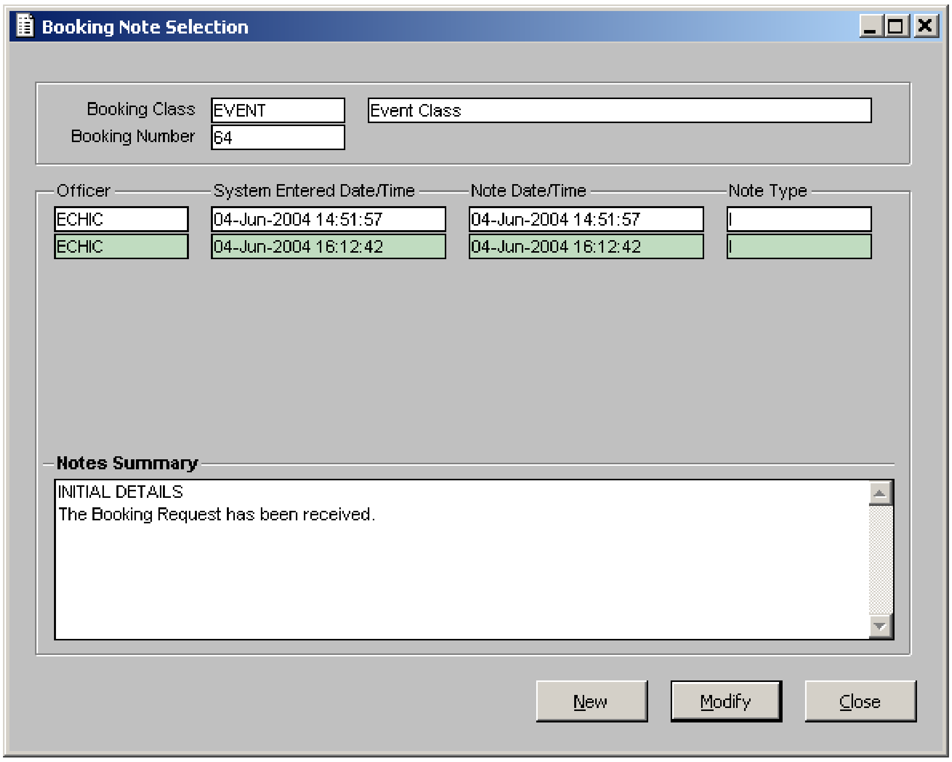
These fields display the Note Type Code and Description, e.g. C, Confirmation Details.

Search Profile – Note Type/Description

Enter a Note Type Code and/or Description on which to base your search and then select the Search button.

Booking Note Selection Form

This form allows the user to create a new Note against a Booking Request or maintain an existing one. This form is accessed via the Options drop down menu on the top menu bar, or by double-clicking the Notes Option indicator on the Booking Request screen. This form will display when at least one Note exists.

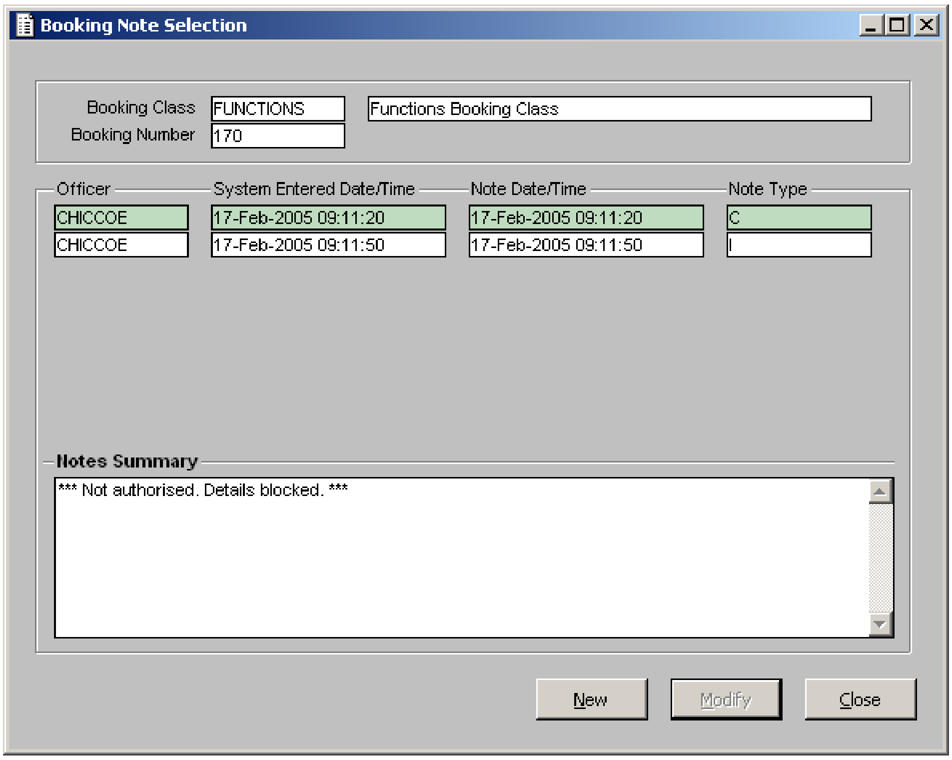


Booking Note Selection form

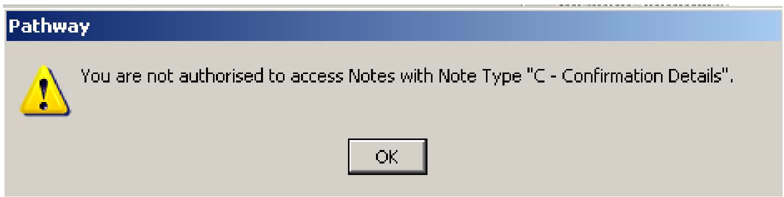
If the user does not have access to a particular Note Type, then the Modify Button will be dimmed when focus is on the Note of that Note Type. The Notes Summary details will not be available for viewing and the Summary box will display the following details:

*** Not authorised. Details blocked. ***

For example:



Double-clicking on the Note will display the following message:



Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number
This field displays the Booking Number allocated to the Booking Request.

Officer
This field displays the UserID of the Officer responsible for creating the Note. This field is not maintainable.

System Entered Date/Time
This date reflects the date on which the Note was created in the system. This field is not maintainable.

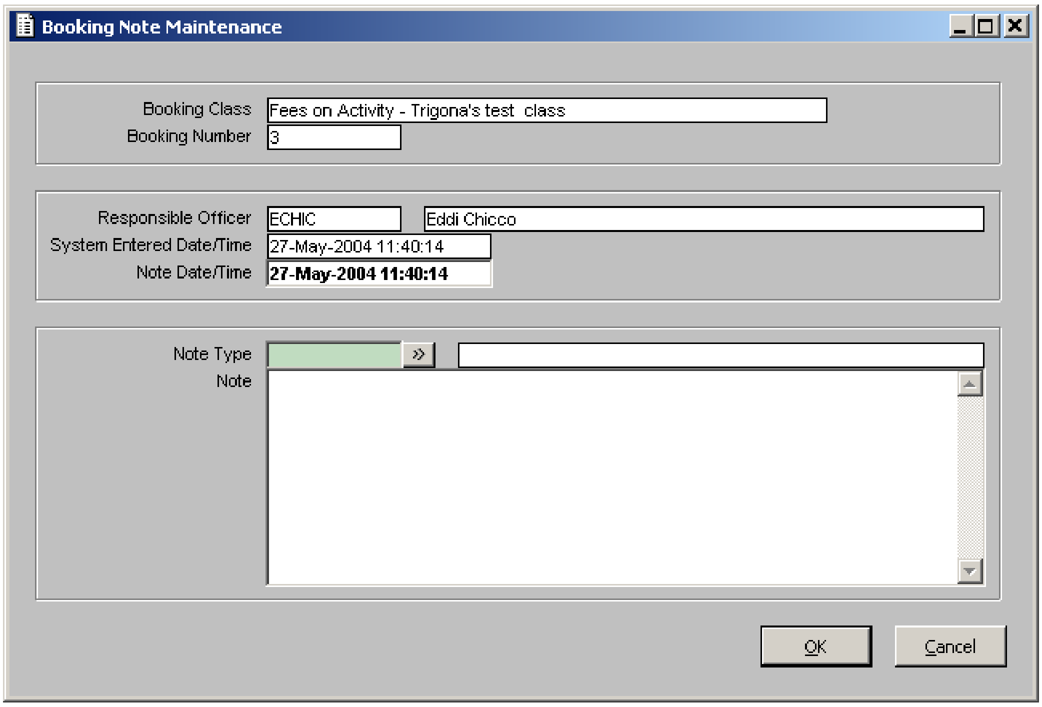
Note Date/Time
This field contains the date that the Note details were provided. This allows Notes from previous days to be added into the system reflecting the date and time that they apply. This will default to the current date and time and is able to be modified by the user. This is a mandatory field.

Note Type
This field displays the Note Type of the Note. This field is not maintainable.

Notes Summary
This field displays the Note Summary details of the Note which has focus. This field is not maintainable.

Booking Note Maintenance Form

This form allows the user to define one or many Notes against a Booking Request. This form is accessed by selecting Notes on the Options drop down menu on the top menu bar, or by double-clicking the Notes Option indicator on the Booking Request screen. If one or more Notes already exist then the Booking Note Selection form displays first.



Booking Note Maintenance Form

Booking Class
These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number
This field displays the Booking Number allocated to the Booking Request.

Responsible Officer
These fields display details of the Officer responsible for creation of the Note.

System Entered Date/Time
This field displays the System Date/Time of the creation of the Note. This field is not maintainable and will default to the current Date/Time.

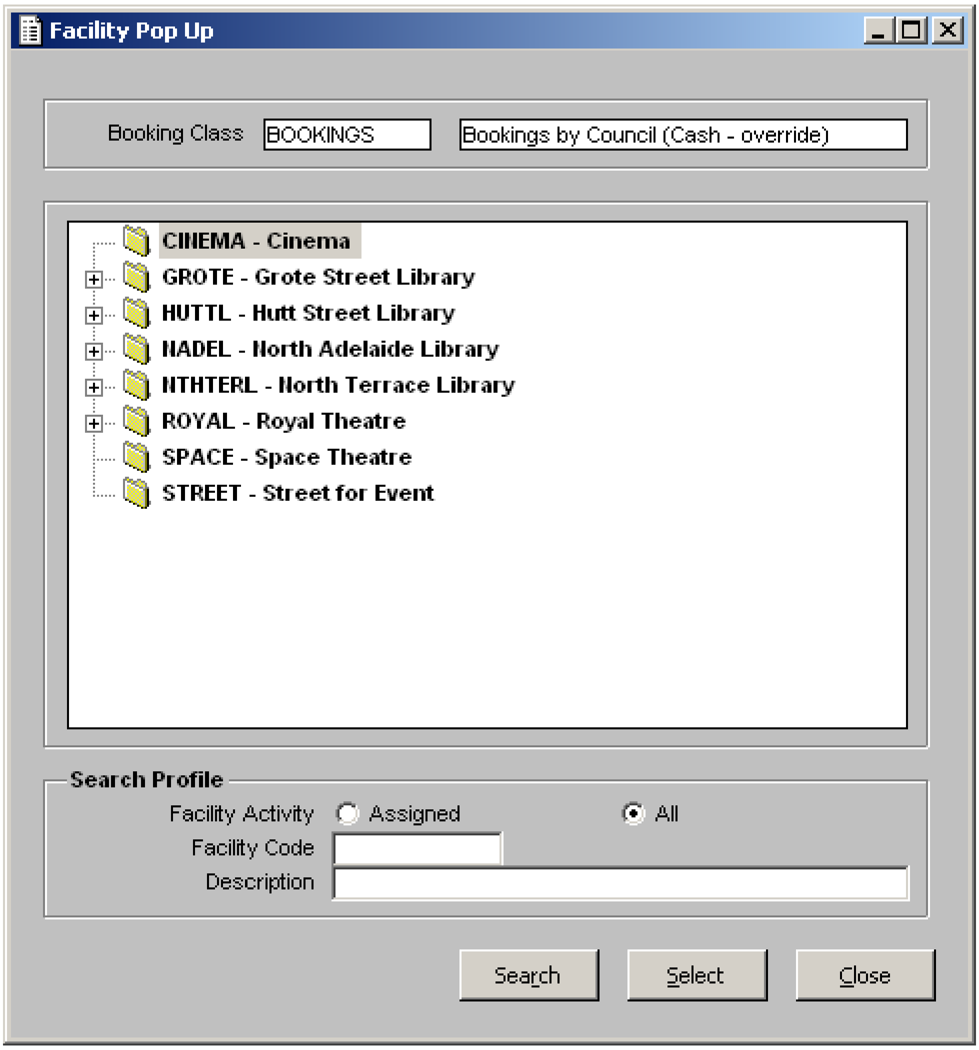
Note Date/Time
This field allows a date to be entered to specify when the Note details were provided. This allows Notes from previous days to be added into the system reflecting the date and time that they apply. This will default the current date and time but will be able to be modified by the user. This is a mandatory field.

Note Type
Key in a Note Type Code, if known, or select one from the Pop Up. This Code is selected from the Note Types defined against the Class and is a mandatory field. Where template details exist against a Note Type, these are defaulted into the Note Details. If the Note Type is being changed against the Note, then a check will be performed and if the new Note Template and existing note Details differ, the user will be presented with a message asking them to confirm whether the details should be overwritten or not. If the user selects “Yes” then the Note Details will be replaced with the new Note Template details.

Note
This field is and free-format unlimited text field. It allows the entry of notes against the Booking Request.

Facility Pop Up Form

The Facility Pop Up form displays when the Facility Pop Up button for a Booking Line is selected on the Booking Entry/Maintenance form. It allows a Facility to be selected to link to a Booking Line.



Facility Pop Up Form

Booking Class

These fields display details of the selected Booking Class. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Facility

This box displays all Facilities and Sub-Facilities which are available to be linked to a Booking Line. The tree-like structure may be expanded or collapsed using the + and – symbols. The display of Facilities will initially be filtered by associated Activity Sub-Types (if any exist) and the Facility Activity option will be set to 'Assigned'. This setting may be changed to 'All' if the user wishes to select from the full list of Facilities.

Search Profile – Facility Activity

If an Activity Sub-Type with associated Facilities has been specified on a Booking, and the Facility Pop Up is invoked on a Booking Line, then, by default, the results will be filtered by the associated Facilities. In this case this field will be set to 'Assigned'. The user may control this list with the radio buttons and display 'All' the Facilities if desired.

Search Profile – Facility Code/Description

Enter a Facility Code and/or Description on which to base your search and then select the Search button.

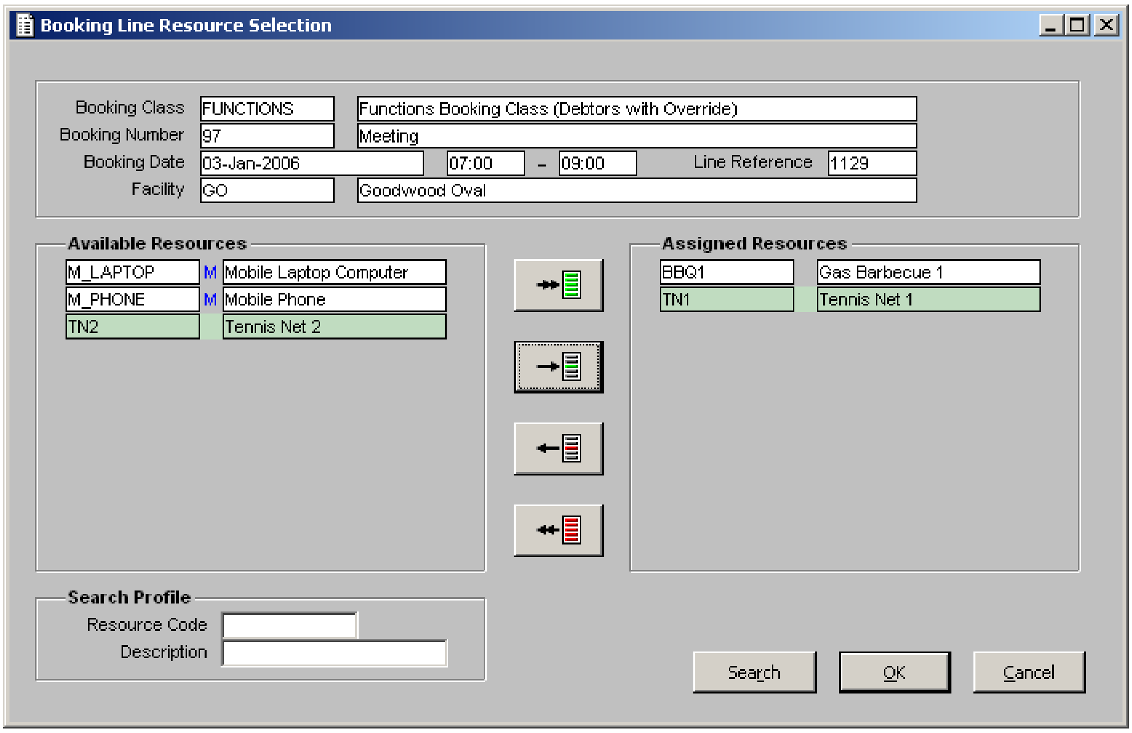
Booking Line Resource Selection form

The Booking Line Resource Selection form allows the user to assign available Facility Resources to a Booking Line. This form is accessed by selecting the Resources button on each Booking Line. The flag included to the left of this button on the Booking Line (in Booking Entry/Maintenance), will indicate whether Resources have been assigned.

The available Resources will display on the left-hand side of the form. If any Mobile Resources exist for the Booking Class, they will display at the top of the list in alphabetical order, followed by Facility Resources.

Note: If a Mobile Resource is 'out of service' due to repairs or maintenance, then it will not be available for selection. It is suggested that Council creates a Facility (e.g. Resource Maintenance) to use for this purpose and allocates to it any Resources that are 'out of service'.

Mobile Resources are identified by an 'M' displayed in between the Resource Code and its Description.



Booking Line Resource Selection form

Booking Class

These fields display details of the Booking Class.

Booking Number/Activity

These fields display the Booking Number and Activity Description to which the Resources are associated. These fields are not maintainable.

Booking Date

These fields display details of the Booking Date, Start Time and End Time. These fields are not maintainable.

Line Reference

This field displays the Booking Line Reference number. This field is not maintainable.

Facility

These fields display the Facility Code and Description to which the Resources are associated, e.g. AS, AAMI Stadium.

Available Resources

These fields display all available Resources for the Facility or Sub-Facility. The Select/Remove buttons may be used to move Resources to and from the ‘Assigned’ side of the form.

Note: Any Resources which have the ‘Allow Booking’ flag turned OFF will only be available for selection by the Parent Facility and one (1) Sub-Facility. As such, the Resource will not appear in the Available Resources list for selection by any of the other Sub-Facilities.

Note: If Mobile Resources exist for the Booking Class, then these will display first on this form in alphabetical order with an ‘M’ between the Code and the Description.

Assigned Resources

These fields display all Resources that have been assigned to the Booking Line.

Search Profile – Resource Code/Description

Enter a Resource Code and/or Description on which to base your search and then select the Search button.

Booking Line Fee Maintenance Form

For each Booking Line, when the user selects the Fees Detail button the Booking Line Fee Maintenance form displays listing all the Fees that have been auto loaded from the Facility. Details may be modified in the lower half of the form and they will be reflected in the Charge details once the form is accepted.

The user is able to re-order the Charge lines to assist with the display of the Fees in Fee Summary and on Invoice/Credit Note documents.

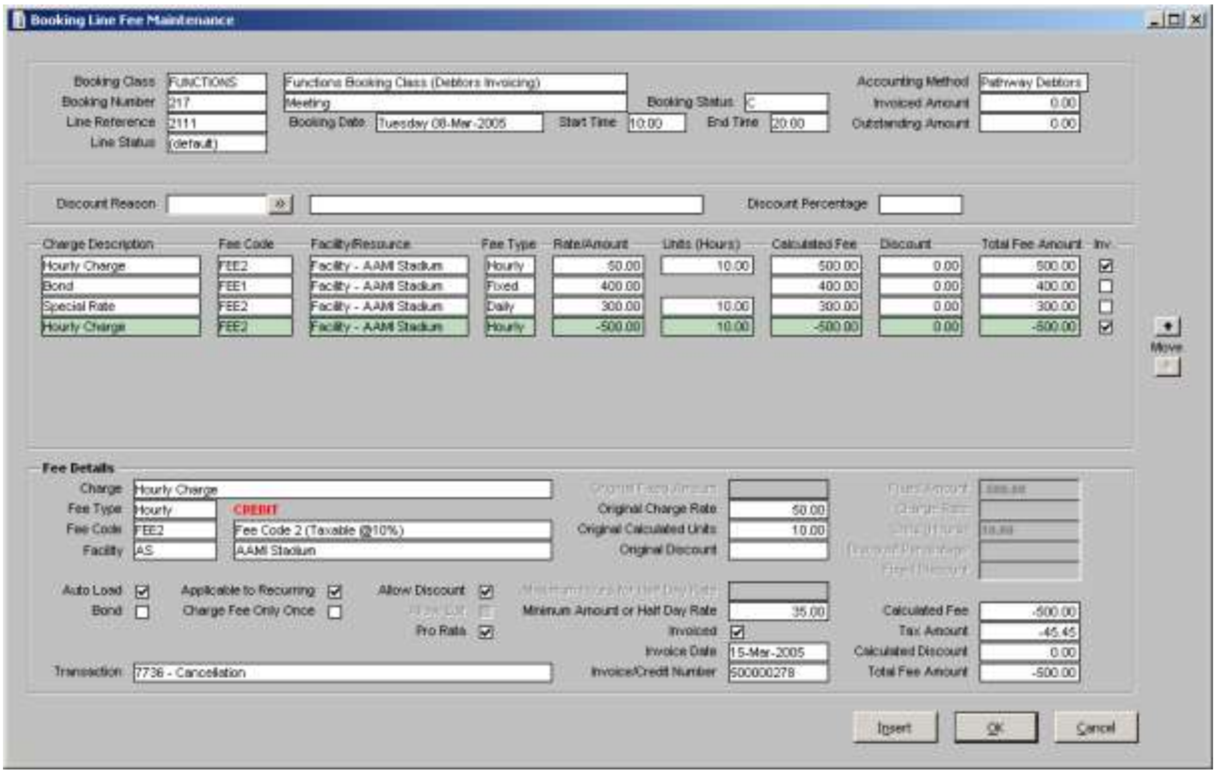
The Charge Details in the lower part of the form contain information about the Charge line above which currently has focus. These details will change as the user focuses on each different Charge Line.

The ability to maintain Fees depends on the security assigned to the user.

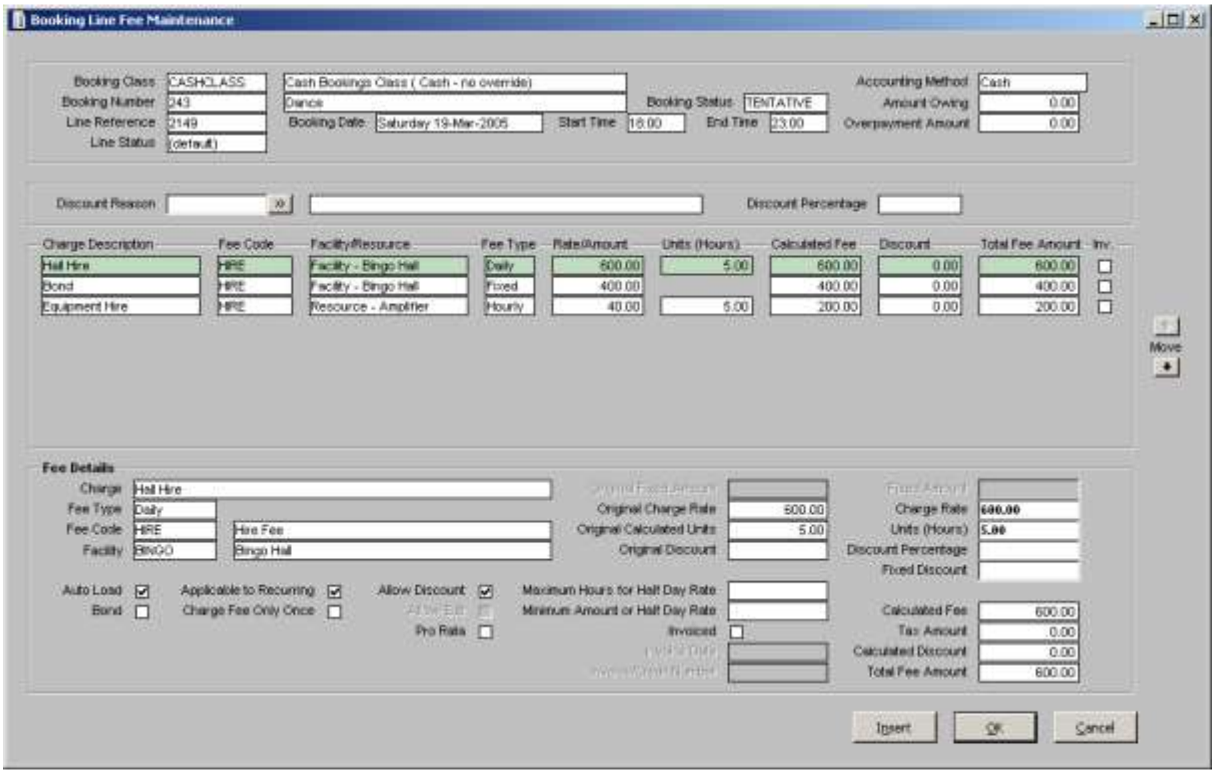
Note: If any manual changes are made to Fee parameters or Resource Fees etc, then these may not be reflected in the Fee Maintenance form until the system refreshes the details. Please review these details after changes are made. (Simply changing some details and then changing them back will be sufficient to force the system to refresh the details)

The Insert Button allows the user to add additional Fees to the Booking Line. Selection of the Insert button will either display the ‘Facility Booking Charge Selection’ form, if there are no Resources available, or, if Resources are also available for selection, then the ‘Insert Booking Line Charges’ form displays to allow the user to insert a Facility Charge and/or a Resource Charge.

If focus is on a credit line, then the word **CREDIT** will display next to the Fee Type field in the Fee details section to alert the user to the existence of the credit transaction.



Booking Line Fee Maintenance form (in Debtors Invoicing mode)



Booking Line Fee Maintenance form (in Cash Invoicing mode)

Booking Class

These fields display details of the Booking Class associated with the Booking Line. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number/Activity

These fields display the Booking Request Number and the Activity associated with the Booking Line.

Booking Status

The Booking Status field displays the Status of the Booking Request. This will be one of the User-defined Statuses based on the following System Statuses:

- Available for Booking
- Confirmed
- Tentative
- Awaiting Response

Line Reference

This field displays the Booking Line Reference. This field is display only.

Booking Date/Start Time/End Time

These fields display the date of the Booking as well as the Start and End Times.

Accounting Method

The Accounting Method field displays the Accounting Method in use for the Booking, i.e. Pathway Debtors or Cash.

Invoiced Amount/Amount Owing

This field displays the amount of the Booking Line that has been invoiced. For Cash Invoicing, this field will display the 'Amount Owing' which is calculated based on the Fee amounts recorded against the Booking, subtracting any Payments received via Receipting.

Outstanding Amount/Overpayment Amount

This field displays the Outstanding Amount for the Booking Line, i.e. the amount which is due for payment. It is calculated by deducting any Receipted payments from the Invoiced Amount.

If a payment is made which covers a number of Booking Lines, then the Debtors system will apportion this payment over all selected Booking Lines.

When a payment is made through Debtors Receipting, the Receipt amount is deducted from the Invoiced Amount and displayed in the Outstanding Amount field.

For Cash Invoicing, this field will display any 'Overpayment Amount'.

If additional fees are added to a Booking, then the Outstanding Amount will be updated to reflect this change. If an Overpayment Amount exists, then the user will be prompted with a message asking if an auto-allocation of the overpayment should occur. If the user responds 'Yes', then the overpayment amount will be allocated to the new fees that have been raised. If the response is 'No' then no auto-allocation of the overpayment will occur. However, the user will be able to access the Overpayment Allocation button and nominate the fees that should be paid using the overpayment amount. (Appropriate GL entries will be generated.)

Discount Reason/Discount Percentage

This field allows the user to enter a Discount Reason Code or select one from the Pop Up listing Discount Reasons defined in parameters. The Discount Percentage associated with the selected Discount Reason is also displayed.

The Discount that is selected will be applied to the fees that relate to the use of the Facility. If the Discount Reason is changed then Fees will be recalculated based on the Fee Discount applicable. If a booking line is invoiced then the Discount Reason will not be able to be changed. See Discount and Account Details.

Charge Description

The Charge Description is defaulted from the Fee details set up for the Facility.

Fee Code/Description

The Fee Code and Description are automatically loaded from the Facility.

Fee Type

The Fee Type is defaulted from the fee Details set up for the Facility. It indicates whether the Fee is Hourly, Daily or Fixed. If a Fee is a Fixed Fee then the amount is displayed in the Rate/Amount field. The user is able to modify the fixed Feed amount if required. If the Fee is either Daily or Hourly then the rate per unit is displayed allowing the user to amend the daily/hourly rate if required.

Rate/Amount

This field displays the Fee amount or rate. If a Fee is a Fixed Fee then the amount is displayed in this field. The user is able to modify the fixed Feed amount if required. If the Fee is either Daily or Hourly then the rate per unit is displayed allowing the user to amend the daily/hourly rate if required.

Units (Hours)

The Units are calculated based on the date and time details entered. This is either in hours or days. The user is able to modify the Units used to calculate the Calculated Charge (in the lower half of the form).

Note: If this is done, then if the Booking Availability is changed, the system will recalculate the Fee and Units. If the user has changed these details manually then they will need to review the fee costs to determine if the units need to be maintained again.

'Out of Hours' time is also included in the generated fees. Where a Booking begins earlier than the Facility opening time, the overlap hour(s) are included in the first Charge amount. Where the Booking ends later than the Facility closing time, the overlap hour(s) are included in the last Charge amount. Where a Booking crosses a 'Gap' in the Available Times, the Duration of the 'Gap' will be included in the Charge for the period prior to the 'Gap'. For example:

A Facility has the following opening times on a Monday:
8 am – 1pm (charged at $50 per hour)
2pm – 10pm (charged at $60 per hour)

A Booking is made for a Monday 7am to 11pm
The calculated fees will be as follows:
7 hours @ $50 = $350.00
9 hours @ $60 = $540.00

Calculated Fee

The Calculated Fee field displays the cost calculated using the Rate/Amount and the Units (for Hourly and Daily Fee Types). No calculation is done for Fixed Fee Types where the Fixed Fee amount is displayed in this field.

If the user alters the Booking Date/Times then the system will recalculate all fees that require recalculation (Note: This may require that the record is saved and reentered to refresh the calculation). This relates to fees that are not fixed.

If there is a Minimum Charge applicable then, if appropriate, this amount will be applied to this field instead of the calculated amount.

See further details in the section on Units (Hours)

Discount

This field displays the Discount which applies to the Fee. The Discount is applied in the Discount Reason/Percentage fields on this form. This discount is applied to all Fees which allow Discount to be applied (as set up in parameters). If the Fee does not allow Discount then the Discount fields (Discount Percentage and/or Fixed discount will not be available for maintenance (in the lower part of the form).

Total Fee
The Total Fee is the total calculated fee after adding the Calculated Charge and Fixed Discount Amount.

Invoiced flag
This is an On/Off flag to indicate whether the charge has been invoiced.

Fee Details – Charge
This field displays the Charge Description of the Charge Line which has focus.

Fee Details – Fee Type
This field displays the Fee Type (e.g. Daily, Hourly or Fixed) of the charge Line which has focus.

Note: If focus is on a credit line, then the word **CREDIT** will display next to the Fee Type field in the Fee details section to alert the user to the existence of the credit transaction.

Fee Details – Fee Code

These fields display the Fee Code and Description that applies to the Charge Line which has focus.

Fee Details – Facility

These fields display the Facility Code and Description pertaining to the Charge Line which has focus.

Fee Details – Original Fixed Amount
This field displays the Original Fixed Amount for the Fee. This ensures that the original amount is recorded if the Fixed Amount is subsequently changed by the user.

Fee Details – Original Charge Rate
This field displays the Original Charge Rate for the Fee. This ensures that the original rate is recorded if the Charge Rate is subsequently changed by the user.

Fee Details – Original Calculated Units
This field displays the Original Calculated Units for the Fee. This ensures that the original number is recorded if the Units (Hours) field is subsequently changed by the user.

Fee Details – Original Discount
This field displays the Original Discount percentage for the Fee. This ensures that the original percentage is recorded if the Discount Percentage is subsequently changed by the user.

Fee Details – Fixed Amount
This field contains the Fixed Amount for the Charge Line, if applicable. This field will contain data only if the Charge Line has a Fixed Fee Type. This field will be blank and dimmed if the Fee Type is Daily or Hourly, or if the ‘Allow Edit’ indicator is set OFF for this Charge at the parameter level.

Fee Details – Charge Rate
This field contains the Charge Rate, which is the daily or hourly amount charged. For hourly charges, this amount, multiplied by the Unit charge, determines the Calculated Fee. For daily charges this amount is affected by the Units field *only* when the Units value is changed to be equal to or lower than the half day rate (and vice versa), e.g.

> Charge Rate = 120.00
> Units (Hours) = 8
>
> If the Units value is changed to 4 (and this is equal to the Half Day Rate as set in the parameters), then the Charge Rate will change to reflect the half day rate, e.g.
>
> Charge Rate = 90.00
> Units (Hours) = 4

This field will not be available for Fixed Fee Types. If the 'Allow Edit' indicator is set OFF for this Charge at the parameter level then this field will not be available for maintenance. Otherwise, the user may modify the Charge Rate.

Fee Details – Units (Hours)
This field contains the Booking duration (in hours) of the Charge Line which has focus. The Units are calculated based on the date and time details entered. The user is able to modify the number of Units to recalculate the Calculated Charge if the 'Allow Edit' flag is set ON for the Fee Type at the parameter level.

Example:

Daily Charge = 120.00
Units (Hours) = 6
Calculated Fee = 120.00
(The number of Units is only used to determine whether the Full Day Charge or the Half Day Charge is to be applied)

Hourly Charge = 120.00
Units (Hours) = 6
Calculated Fee = 720.00
(The Hourly Charge is multiplied by the Units to achieve the Calculated Fee)

Fee Details – Discount Percentage
The Discount Percentage field allows the user to enter a percentage discount to apply. If a Discount Percentage is entered by the user then the system will calculate the discount and display the amount in the Calculated discount field. If a Discount Percentage is applied then the Fixed Discount field is not available.

Fee Details – Fixed Discount
The Fixed Discount Amount field allows the user to enter a Discount Amount (not a percentage) to apply to the Fee. This field is only available if there is no value in the Discount Percentage field.

Note: The user cannot enter a Discount Amount which is greater than the Calculated Fee Amount.

Fee Details – Auto Load
The Auto Load flag indicates whether the Fee has been set to load automatically when the Fees are generated. This field is not maintainable from this form.

Fee Details – Bond
The Bond flag indicates whether the Fee has been deemed a Bond Fee in Charge Maintenance at the parameter level. This type of Fee is a 'one-off' Fee which will eventually be refunded to the customer. This field is not maintainable from this form.

Fee Details – Applicable to Recurring
This is an On/Off flag which indicates whether the Charge is able to be added against a recurring Booking. If set ON then the Charge will be auto-loaded if appropriate. If set OFF, then the charge will only be auto-loaded against Booking Lines that are not recurring.

Fee Details – Charge Fee Only Once
This flag indicates whether the Fee is only to be invoiced once for a Booking, e.g. a Bond. The system will not allow this type of Fee to be generated more than once for invoicing purposes.

This field is an On/Off flag which is only available where the Charge is applicable to Recurring Bookings. If this field is set ON then the Charge will only be charged against the first Invoice that is issued against the Booking Request. Subsequent Invoices generated for the Booking will not have the charge applied. This will be used in the following circumstance:

E.g. A regular booking is made for a weekly meeting in the local hall. The first Invoice will charge a Bond for the use, but the one Bond charge will be applicable for the entire year, i.e.

the Bond charge will not be charged on subsequent invoices. If this field is set to OFF then the charge will be applied to all invoices that are generated against the booking. By default the value of this field will be set OFF and the user will be required to set this ON.

Fee Details – Allow Discount

The ‘Allow Discount’ flag indicates whether the fee allows a discount to be applied. If this flag is set to OFF then the Discount fields will not be available. If this flag is set to ON and a Discount Code and percentage have been entered by the user, then the percentage will display in the Discount Percentage field and the system will calculate the Discount and display the amount in the Calculated Discount field. See Discount and Account Details.

Fee Details – Allow Edit

The ‘Allow Discount’ flag indicates whether the fee allows a discount to be applied. If this flag is set to OFF then the Discount fields will not be available.

Fee Details – Pro Rata

The “Pro-Rata” flag indicates whether the Fee allows the Hourly cost to be Pro-Rated. If this indicator is set on, then the fee may have the pro-rata parameters applied to the hourly rate.

Fee Details – Maximum Hours for Half Day Rate / Maximum Amount for Half Day Rate

The “Maximum Hours for Half Day Rate” field indicates the number of hours which must be exceeded in order for the full daily rate to apply. This is used in combination with the field “Maximum Amount for Half Day Rate” which displays the lowest amount to be charged. Once the Maximum Hours for Half Day Rate have been exceeded then a full day rate will be applied.

Fee Details – Invoiced

The Invoiced flag indicates whether the Charge Line has been invoiced.

Fee Details – Invoice Date

The Invoice Date will display in this field if the Charge Line has been invoiced.

Fee Details – Invoice/Credit Number

The Invoice/Credit number will display in this field if the Charge Line has been invoiced.

Fee Details – Calculated Fee

This field displays the cost calculated using either the Fixed Amount or the Charge Rate/Units. If tax is applicable then it is included in the Calculated Fee.

Fee Details – Tax Amount

This field displays the proportion of the Total Fee Amount which is the Tax component. Tax is always calculated on the nett amount (Total Fee Amount) after any discount has been deducted, i.e. Calculated Fee – Calculated Discount = Total Fee Amount. The Tax component (using a Tax of 10%) on a Total Fee Amount of $100 would be 9.09 cents. This is calculated as follows: 100/11 = 9.09.

Fee Details – Calculated Discount

This field displays the amount of Discount which has been calculated based on the Discount Percentage field.

Fee Details – Total Fee Amount

The Total Fee amount is the total calculated fee (including charges for Resources) using the Calculated Fee and the Calculated Discount in the calculation.

Transaction

The Transaction field will display once the Charge Line has been invoiced. It will display the Transaction Description details.

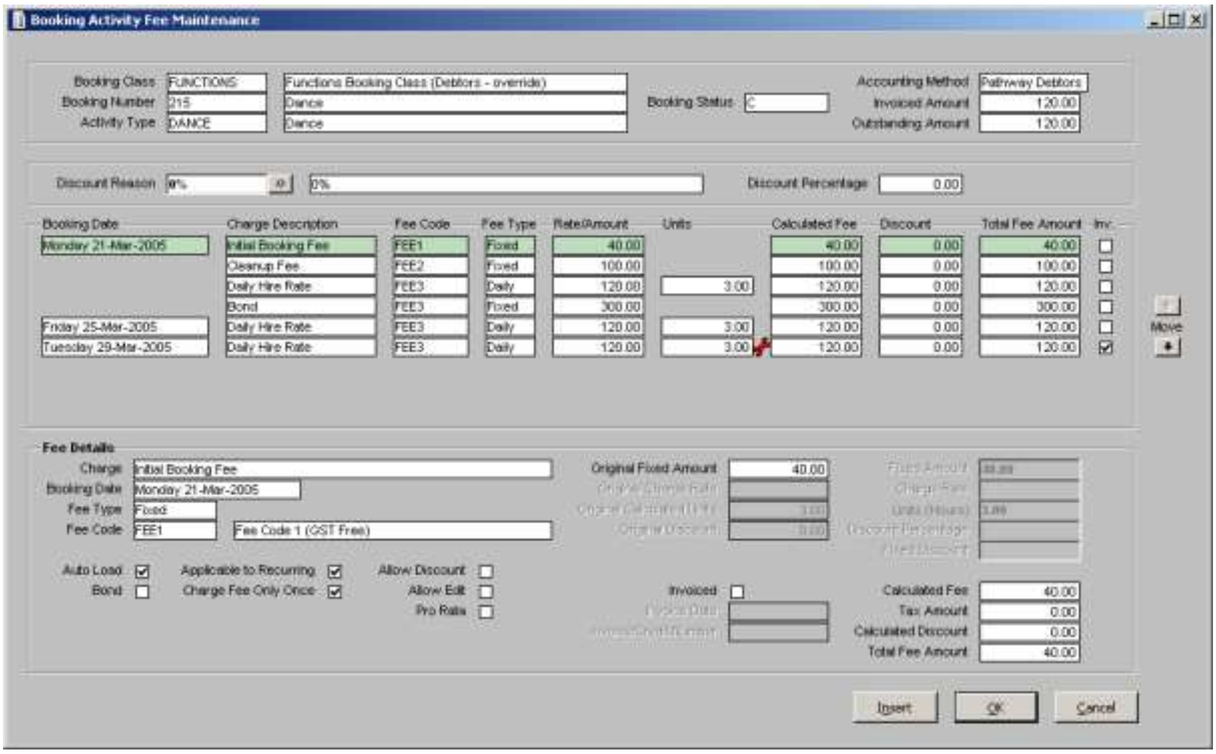
Booking Activity Fee Maintenance Form

The Booking Activity Fee Maintenance form displays when the Activity Fees Option button is selected on the Booking Entry/Maintenance form (or via the Options Menu). It allows viewing and maintenance of Activity Fees associated with the Booking.

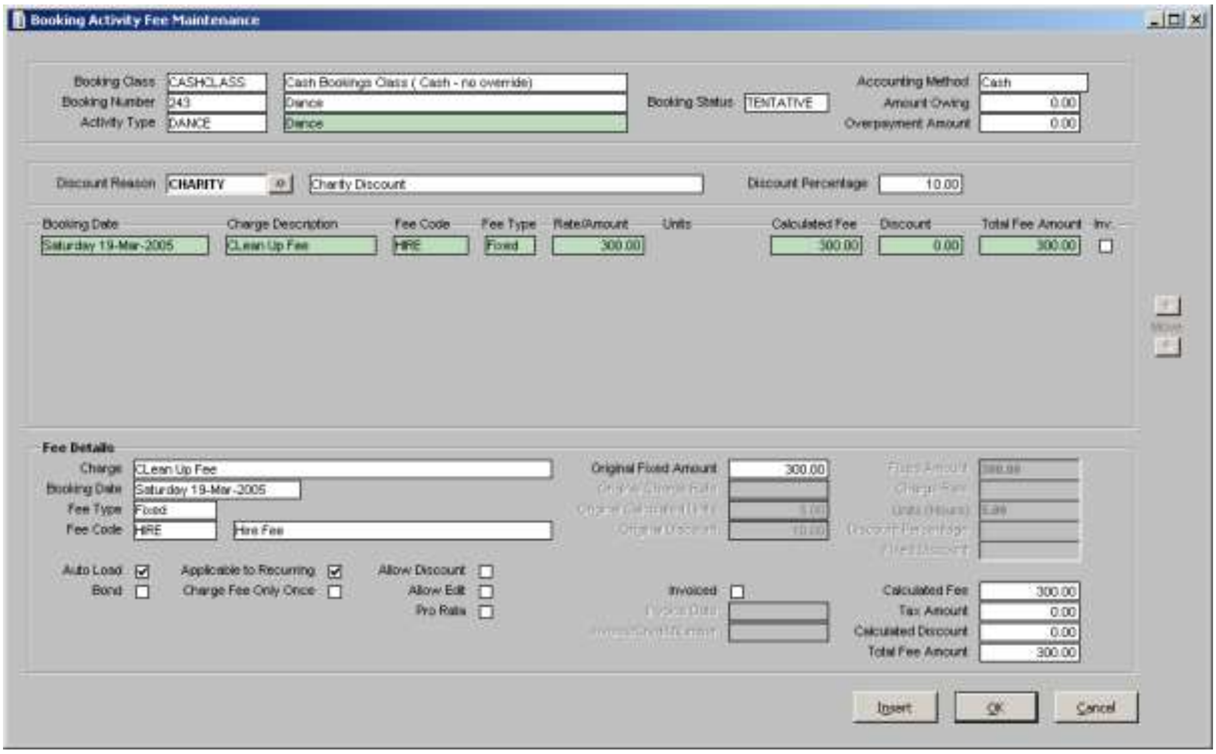
Charges are listed by Booking Date, and Fee Details for each Charge are viewable in the b bottom half of the form when focus is placed on the Fee line.

Note: If a Charge has already been invoiced and subsequently changes are made to the duration of the Activity resulting in different charges applying, then a ‘spanner’ glyph will display next to the Calculated Fee field to indicate that the number of booked hours has changed. Placing focus on the Charge line will display further details in the Fee Details section to indicate these changed values. It is then the council’s responsibility to make any adjustments necessary e.g. via a Credit Note. (Once a Charge Line has been invoiced, the amount will not change.)

The Move Buttons may be used to reorder the Charge Lines if required. It is only possible to reorder the lines within a particular date.

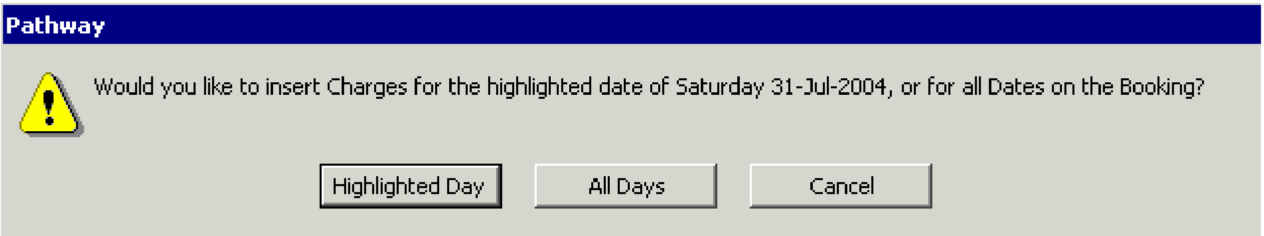


Booking Activity Fee Maintenance form (in Debtors Invoicing mode)



Booking Activity Dee Maintenance Form (in Cash Invoicing mode)

The Insert button displays the Activity Type Booking Charge Maintenance form which allows the user to add additional Activity Type Fees. Initially, selection of the Insert Button after focusing on an Activity Charge Line will display the message: “Would you like to insert Charges for the highlighted date of Saturday 31-Jul-2004, or for all Dates on the Booking?” This allows the user to choose whether to add a single Charge Line for the selected day, or one that applies to all existing Booking Dates.



Booking Class

These fields display details of the Booking Class related to the Booking. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number/Activity

These fields display the Booking Request Number and the Activity associated with the Booking.

Activity Type

These fields display details of the Activity Type associated with the Booking, e.g. D, Dance.

Booking Status

This field displays the Booking Status Code associated with the Booking, e.g. C, Confirmed.

Accounting Method

The Accounting Method field displays the Accounting Method in use for the Booking, i.e. Pathway Debtors or Cash.

Invoiced Amount/Amount Owing
This field displays the amount of the Activity Fee that has been invoiced. For Cash Invoicing, this field will display the 'Amount Owing' which is calculated based on the Fee amounts recorded against the Booking, subtracting any Payments received via Receipting.

Outstanding Amount/Overpayment Amount
This field displays the Outstanding Invoiced Amount for the Activity Fee. This allows the user to see how much is still due for payment for the Activity Fee.

When a payment is made through Debtors Receipting, the Receipt amount is deducted from the Invoiced Amount and displayed in the Outstanding Amount field.

For Cash Invoicing, this field will display any 'Overpayment Amount'.

If additional fees are added to a Booking, then the Outstanding Amount will be updated to reflect this change. If an Overpayment Amount exists, then the user will be prompted with a message asking if an auto-allocation of the overpayment should occur. If the user responds 'Yes', then the overpayment amount will be allocated to the new fees that have been raised. If the response is 'No' then no auto-allocation of the overpayment will occur. However, the user will be able to access the Overpayment Allocation button and nominate the fees that should be paid using the overpayment amount. (Appropriate GL entries will be generated.)

Discount Reason/Discount Percentage
This field allows the user to enter a Discount Reason Code or select one from the Pop Up listing Discount Reasons defined in parameters. The Discount Percentage associated with the selected Discount Reason is also displayed.

The Discount that is selected will be applied to the fees that relate to the Activity. If the Discount Reason is changed then Fees will be recalculated based on the Fee Discount applicable. If an Activity is invoiced then the Discount Reason will not be able to be changed.

The Discount Percentage field is display only and cannot be maintained.

Booking Date
This field displays the date of each Booking Line, e.g. Saturday 30-Oct-2004. Fee Charges are listed in ascending Booking Date order

Charge Description
The Charge Description is defaulted from the Fee details set up for the Activity.

Fee Code
The Fee Code is automatically loaded from the Activity.

Fee Type
The Fee Type is defaulted from the Fee Details set up for the Activity. It indicates whether the Fee is Hourly, Daily or Fixed. If a Fee is a Fixed Fee then the amount is displayed in the Rate/Amount field. The user is able to modify the fixed Feed amount if required. If the Fee is either Daily or Hourly then the rate per unit is displayed allowing the user to amend the daily/hourly rate if required.

Rate/Amount
This field displays the Fee amount or rate. If a Fee is a Fixed Fee then the amount is displayed in this field. The user is able to modify the fixed Feed amount if required. If the Fee is either Daily or Hourly then the rate per unit is displayed allowing the user to amend the daily/hourly rate if required.

Units (Hours)
The Units are calculated based on the date and time details entered. This is either in hours or days. The user is able to modify the Units used to calculate the Calculated Charge (in the lower half of the form).

Note: If this is done, then if the Booking Availability is changed, the system will recalculate the Fee and Units. If the user has changed these details manually then they will need to review the fee costs to determine if the units need to be maintained again.

Calculated Fee

The Calculated Fee field displays the cost calculated using the Rate/Amount and the Units (for Hourly and Daily Fee Types). No calculation is done for Fixed Fee Types where the Fixed Fee amount is displayed in this field.

If the user alters the Booking Date/Times then the system will recalculate all fees that require recalculation (Note: This may require that the record is saved and reentered to refresh the calculation). This relates to fees that are not fixed.

If there is a Minimum Charge applicable then, if appropriate, this amount will be applied to this field instead of the calculated amount.

Discount

This field displays the Discount which applies to the Fee. The Discount is applied in the Discount Reason/Percentage fields on this form, or defaulted from the Booking Maintenance form. This discount is applied to all Fees which allow Discount to be applied (as set up in parameters). If the Fee does not allow Discount then the Discount fields (Discount Percentage and/or Fixed discount will not be available for maintenance (in the lower part of the form).

Total Fee

The Total Fee is the total calculated fee after adding the Calculated Charge and Fixed Discount Amount.

Invoiced flag

This is an On/Off flag to indicate whether the Charge has been invoiced.

Fee Details – Charge

This field displays the Charge Description of the Charge Line which has focus.

Booking Date

This field displays the Booking Date of the charge Line which has focus.

Fee Details – Fee Type

This field displays the Fee Type (e.g. Daily, Hourly or Fixed) of the charge Line which has focus.

Fee Details – Fee Code

These fields display the Fee Code and Description that applies to the Charge Line which has focus.

Auto Load

The Auto Load flag indicates whether the Fee has been set to load automatically when the Fees are generated. This field is not maintainable from this form.

Bond

The Bond flag indicates whether the Fee has been deemed a Bond Fee in Charge Maintenance at the parameter level. This type of Fee is a 'one-off' Fee which will eventually be refunded to the customer. This field is not maintainable from this form.

Applicable to Recurring

This is an On/Off flag which indicates whether the Charge is able to be added against a recurring Booking. If set ON then the Charge will be auto-loaded if appropriate. If set OFF, then the charge will only be auto-loaded against Booking Lines that are not recurring.

Charge Fee Only Once

This flag indicates whether the Fee is only to be charged once for a Booking, e.g. a Bond. The system will not allow this type of Fee to be generated more than once for a Booking Request.

Allow Discount

The ‘Allow Discount’ flag indicates whether the fee allows a discount to be applied. If this flag is set to OFF then the Discount fields will not be available. If this flag is set to ON and a Discount Code and percentage have been entered by the user, then the percentage will display in the Discount Percentage field and the system will calculate the Discount and display the amount in the Calculated Discount field.

Allow Edit
The ‘Allow Discount’ flag indicates whether the fee allows a discount to be applied. If this flag is set to OFF then the Discount fields will not be available.

Pro Rata
The “Pro-Rata” flag indicates whether the Fee allows the Hourly cost to be Pro-Rated. If this indicator is set on, then the fee may have the pro-rata parameters applied to the hourly rate.

Fee Comment
The Fee comment field displays under the following circumstances:
- When an invoiced Charge line has focus. In this instance it will display the Charge description.
- When a Credit Note line has focus. In this instance it will display the Credit Note number as well as the Credit Reason.

Fee Details – Original Fixed Amount
This field displays the Original Fixed Amount for the Fee. This ensures that the original amount is recorded if the Fixed Amount is subsequently changed by the user.

Fee Details – Original Charge Rate
This field displays the Original Charge Rate for the Fee. This ensures that the original rate is recorded if the Charge Rate is subsequently changed by the user.

Fee Details – Original Calculated Units
This field displays the Original Calculated Units for the Fee. This ensures that the original number is recorded if the Units (Hours) field is subsequently changed by the user.

Fee Details – Original Discount
This field displays the Original Discount percentage for the Fee. This ensures that the original percentage is recorded if the Discount Percentage is subsequently changed by the user.

Current Actual Booked Hours
This field only displays if focus is placed on a Charge Line with a ‘spanner’ glyph, i.e. a Charge which has already been invoiced and subsequently has had duration details changed resulting in different charges applying. It will display the changed hours, e.g. 3.00.

Current Charge Rate
This field only displays if focus is placed on a Charge Line with a ‘spanner’ glyph, i.e. a Charge which has already been invoiced and subsequently has had duration details changed resulting in different parameters applying, such as the half day rate. It will display the current (changed) charges, e.g. 80.00.

Invoiced
The Invoiced flag indicates whether the Charge Line has been invoiced.

Invoice Date
The Invoice Date will display in this field if the Charge Line has been invoiced.

Invoice/Credit Number
The Invoice/Credit number will display in this field if the Charge Line has been invoiced.

Fee Details – Fixed Amount
This field contains the Fixed Amount for the Charge Line, if applicable. This field will contain data only if the Charge Line has a Fixed Fee Type. This field will be blank and dimmed if the Fee Type is Daily or Hourly, or if the ‘Allow Edit’ indicator is set OFF for this Charge at the parameter level.

Fee Details – Charge Rate

This field contains the Charge Rate, which is the daily amount charged. This amount is affected by the Units field *only* when the Units value is changed to be equal to or lower than the half day rate (and vice versa), e.g.

Charge Rate = 120.00
Units (Hours) = 8

If the Units value is changed to 4 (and this is equal to the Half Day Rate as set in the parameters), then the Charge Rate will change to reflect the half day rate, e.g.

Charge Rate = 90.00
Units (Hours) = 4

Note: The Charge Rate for Activity Fees is *not* multiplied by the Units to achieve the Calculated Fee. This only applies to Facility and Resource Charges where hourly charges may apply.

This field will not be available for Fixed Fee Types. If the 'Allow Edit' indicator is set OFF for this Charge at the parameter level then this field will not be available for maintenance. Otherwise, the user may modify the Charge Rate.

Fee Details – Units (Hours)
This field contains the Booking duration (in hours) of the Charge Line which has focus. The Units are calculated based on the date and time details entered. The user is able to modify the number of Units and this will determine whether the full or half day Charge Rate is applied.

Note: The Charge Rate for Activity Fees is *not* multiplied by the Units to achieve the Calculated Fee. This only applies to Facility and Resource Charges where hourly charges may apply.

Modifications to this field is only allowed if the 'Allow Edit' flag is set ON for the Fee Type at the parameter level.

Fee Details – Discount Percentage
The Discount Percentage field allows the user to enter a percentage discount to apply. If a Discount Percentage is entered by the user then the system will calculate the discount and display the amount in the Calculated discount field. If a Discount Percentage is applied then the Fixed Discount field is not available.

Fee Details – Fixed Discount
The Fixed Discount Amount field allows the user to enter a Discount Amount (not a percentage) to apply to the Fee. This field is only available if there is no value in the Discount Percentage field.

Calculated Fee
This field displays the cost calculated using either the Fixed Amount or the Charge Rate/Units. If tax is applicable then it is included in the Calculated Fee.

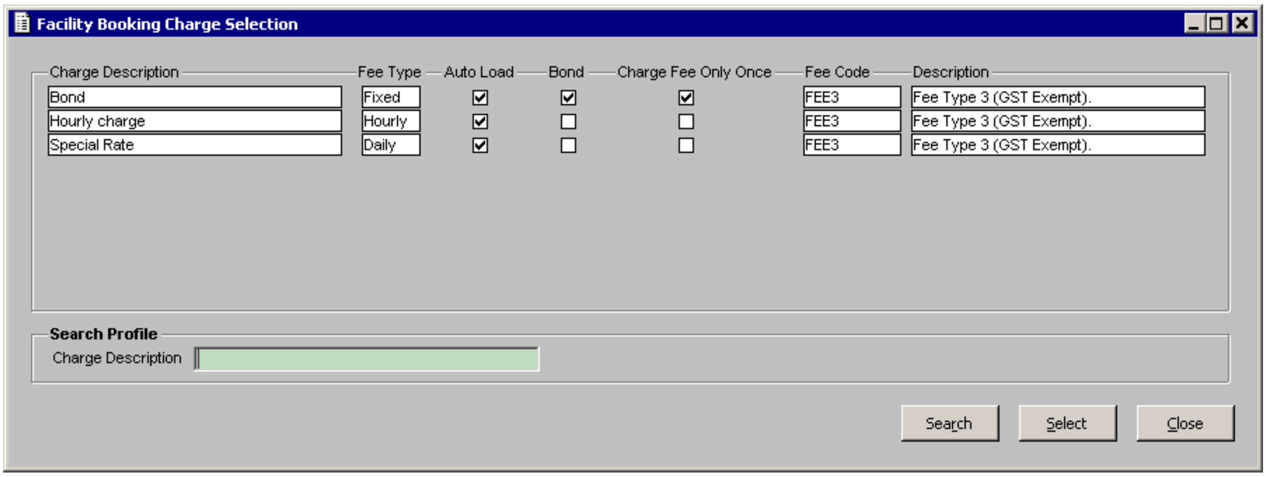
Tax Amount
This field displays the proportion of the Calculated Fee which is the Tax component.

Calculated Discount
This field displays the amount of Discount which has been calculated based on the Discount Percentage field.

Total Fee Amount
The Total Fee amount is the total calculated fee for the Activity using the Calculated Fee and the Calculated Discount in the calculation.

Activity Type/Facility/Resource Booking Charge Selection Form

The Activity Type (or Facility) Booking Charge Selection Form allows selection of Charges which are available for allocating to the Activity Type/Facility. Multi-select is available. Once selected, the Fees are added to the Insert Booking Activity Charges form, if Resources also exist. If Resources do not exist then, after making a selection on this form, the Charges are added directly to the list of Charges in the Booking Line Fee Maintenance form bypassing the intermediate step of being added to the 'Insert Booking Line Charges' form.



Facility Booking Charge Selection form

Charge Description

This field displays the Charge Description of all Charges which are available to be allocated to the Activity Type/Facility/Resource.

Fee Type

This field displays details of the Fee Type (e.g. Fixed, Hourly or Daily).

Auto Load

If this flag is checked ON it indicates that the fee is an automatically loaded fee (i.e. loaded when the Activity/Facility/Resource is selected).

Bond

This flag indicates whether the Fee is associated with a Bond.

Charge Fee Only Once

This flag indicates whether the Fee is only to be invoiced once for a Booking, e.g. a Bond. The system will not allow this type of Fee to be generated more than once for invoicing purposes.

This field is an On/Off flag which is only available where the Charge is applicable to Recurring Bookings. If this field is set ON then the Charge will only be charged against the first Invoice that is issued against the Booking Request. Subsequent Invoices generated for the Booking will not have the charge applied. This will be used in the following circumstance:

> E.g. A regular booking is made for a weekly meeting in the local hall. The first Invoice will charge a Bond for the use, but the one Bond charge will be applicable for the entire year, i.e. the Bond charge will not be charged on subsequent invoices. If this field is set to OFF then the charge will be applied to all invoices that are generated against the booking. By default the value of this field will be set OFF and the user will be required to set this ON.

Fee Code/Description

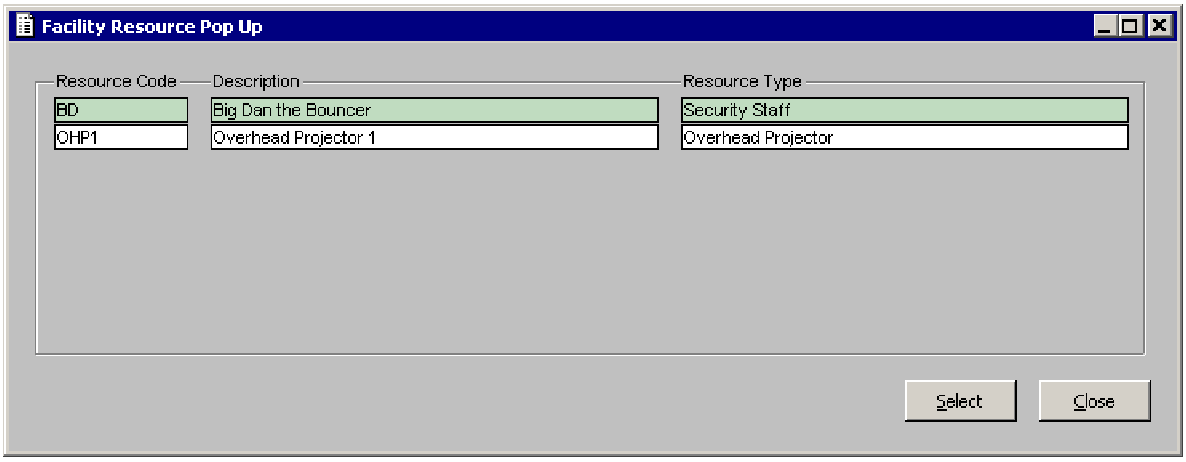
These fields display Fee Code and Description details.

Search Profile – Charge Description

Enter a Charge Description on which to base your search and then select the Search button. This function is useful when there are more than 9 Fees over which to search.

Facility Resource Pop Up

The Facility Resource Pop Up displays all Resources available for the Facility and allows selection of Resources for displaying Resource Charges. The selected Resource Charges will display in the Resource Booking Charge Selection form where the user may select one or more to add to the Booking Line. Once selected, the Fees are added to the Insert Booking Line Charges form for confirmation, and once OK is selected on this form the Charges are added to the Booking Line Fees on the Booking Line Fee Maintenance form.



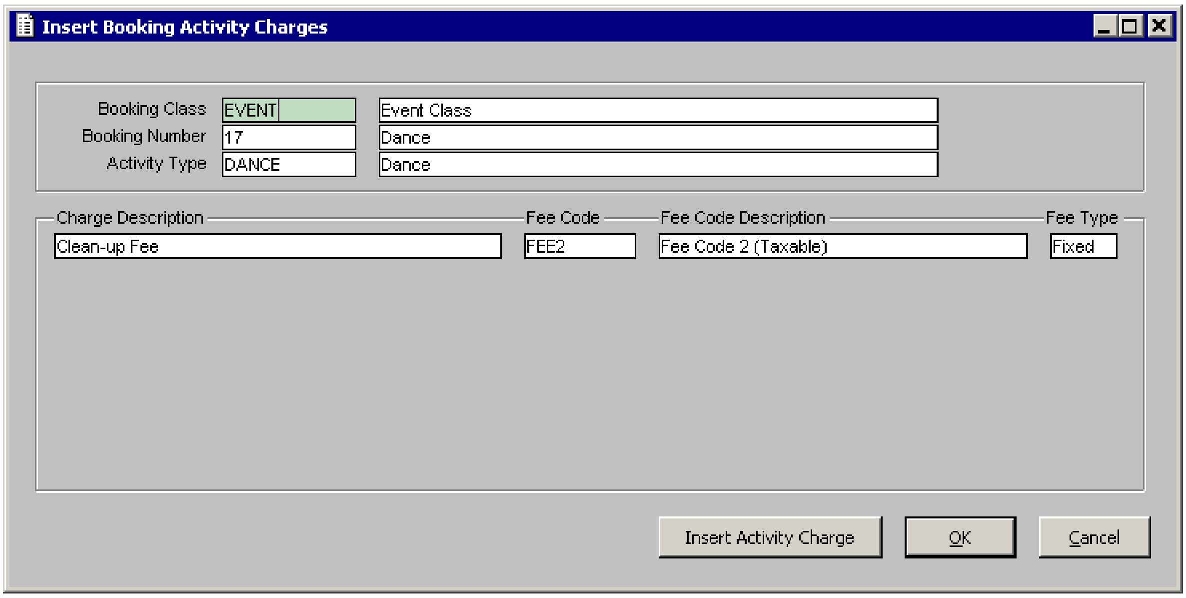
Facility Resource Pop Up form

Resource Code/Description
These fields display the Resource Code and Description of Facility Resources which have been assigned to the Booking Line.

Resource Type
This field displays the Resource Type of the Facility Resource.

Insert Booking Activity Charges Form

This form displays after Charges are selected from the Activity Type Booking Charge Selection form. It is used to collect all Charges which have been selected before they are added to the Booking Activity Fee Maintenance form. Clicking OK on this form adds these Charges to the Booking Activity Fee Maintenance form.



Insert Booking Activity Charges form

Booking Class

These fields display details of the Booking Class related to the Booking Request. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number

These fields display the Booking Number and the Activity.

Activity Type

These fields display the Activity Type and Description for the Booking.

Charge Description

This field displays a description for the selected Activity Charge.

Fee Code/Description

These fields display details of the Fee Code and Description.

Fee Type

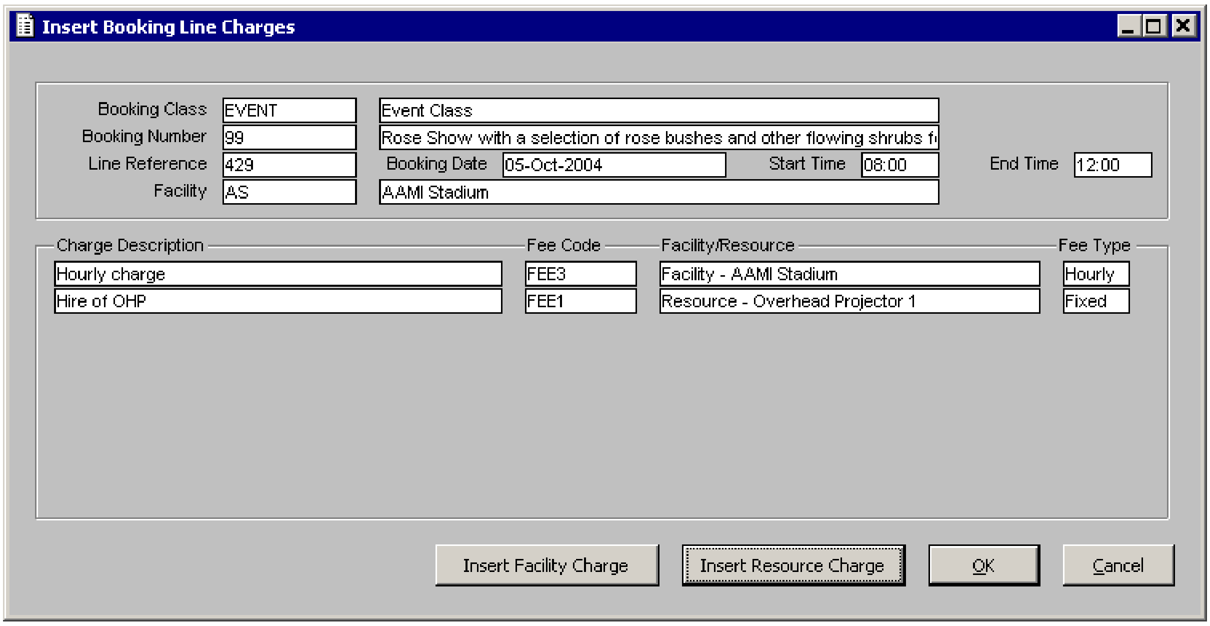
This field displays the Type of Fee, e.g. Fixed, Daily or Hourly.

Insert Activity Charge Button

This button allows the user to select additional Activity Charges to insert on the Booking Line. Selection of this button displays the Activity Type Booking Charge Selection form where available Activity Charges may be selected.

Insert Booking Line Charges Form

This form displays when the Insert button is selected on the Booking Line Fee Maintenance form when Resource Fees as well as Facility Fees are available for insertion on the Booking Line. It is used to collect all Charges which have been selected before they are added to the Booking Line Fee Maintenance form. Clicking OK on this form calculates and adds these Charges to the Booking Line Fee Maintenance form.



Insert Booking Line Charges Form

Booking Class

These fields display details of the Booking Class pertaining to the Booking Line. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number

These fields display the Booking Number and Activity.

Line Reference

This field displays the Booking Line Reference Number.

Booking Date/Start Time/End Time

These fields display the Booking Date as well as the proposed Start and End Time for the Booking Line.

Facility

These fields display details of the Facility which has been booked, e.g. AS, AAMI Stadium.

Charge Description

This field includes a description of the Charge, e.g. Bond.

Fee Code

This fields displays the Fee Code applicable to the Charge, e.g. FEE3.

Facility/Resource

This field will display details of either the Facility or the Resource depending on the type of Charge.

Fee Type

This field displays the Type of Fee, e.g. Fixed, Daily or Hourly.

Insert Facility Charge Button

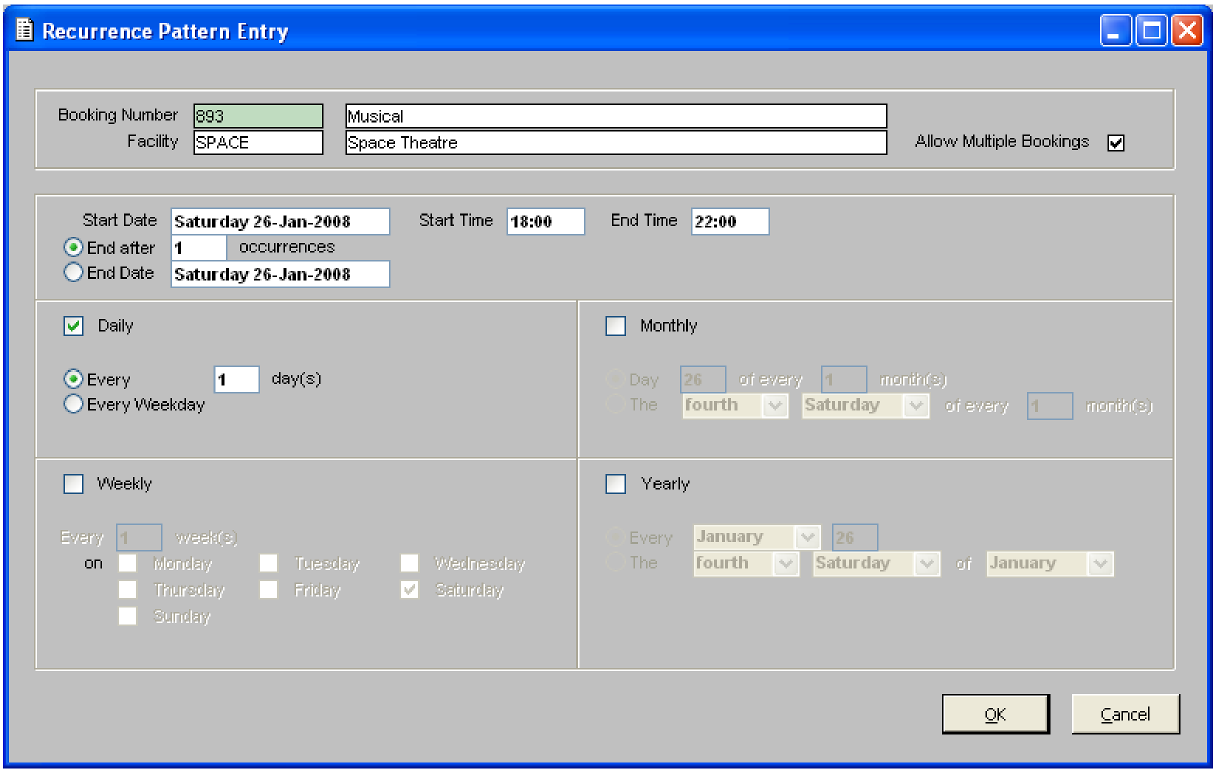
This button allows the user to select additional Facility Charges to insert on the Booking Line. Selection of this button displays the Facility Booking Charge Selection form where available Facility Charges may be selected.

Insert Resource Charge Button

This button allows the user to select additional Resource Charges to insert on the Booking Line. Selection of this button displays the Facility Resource Pop Up where available Resources may be selected. Once a Resource is selected, the Resource Booking charge selection form displays where Resource Charges may be selected for insertion on the Booking Line.

Booking Line Recurrence Pattern Maintenance Form

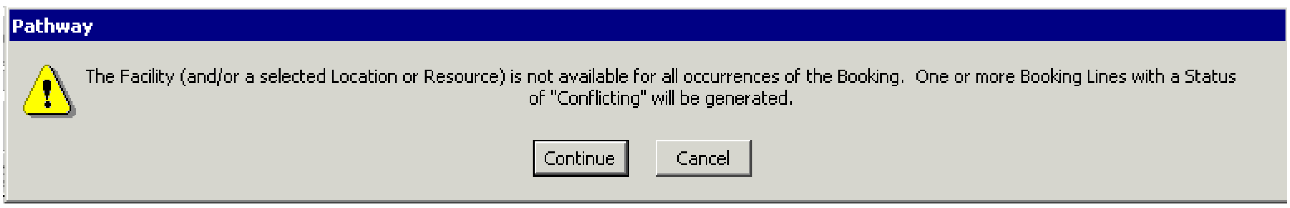
This form may be used to define a Recurrence Pattern for a Booking. This will define parameters for setting up a Booking which is to recur on a regular basis, e.g. daily, weekly, monthly or yearly.



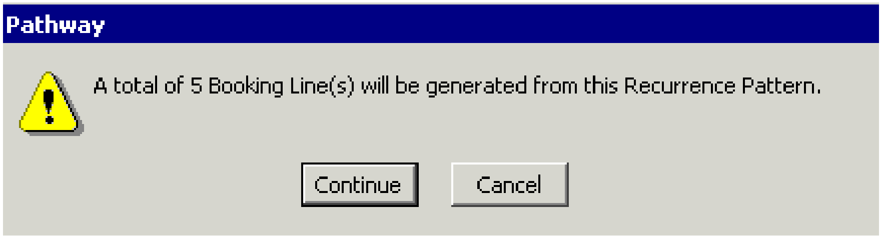
Recurrence Pattern Maintenance form

<u>Conflicting Bookings</u>

When maintaining a Recurrence Pattern against a Booking Line, selecting the 'OK' button initiates the generation of all Lines that match the pattern. Generated Lines have the same Locations or Resources as the 'foundation' Line, and Fees are calculated as appropriate. A warning is displayed if any of the Lines to be generated will conflict with an existing Booking Line, and the user is given the chance to back out of the generation process, e.g.



If the user wishes to continue, a confirmation message will display, e.g.



The user is again given the option to cancel the operation or continue, in which case, the following will apply:

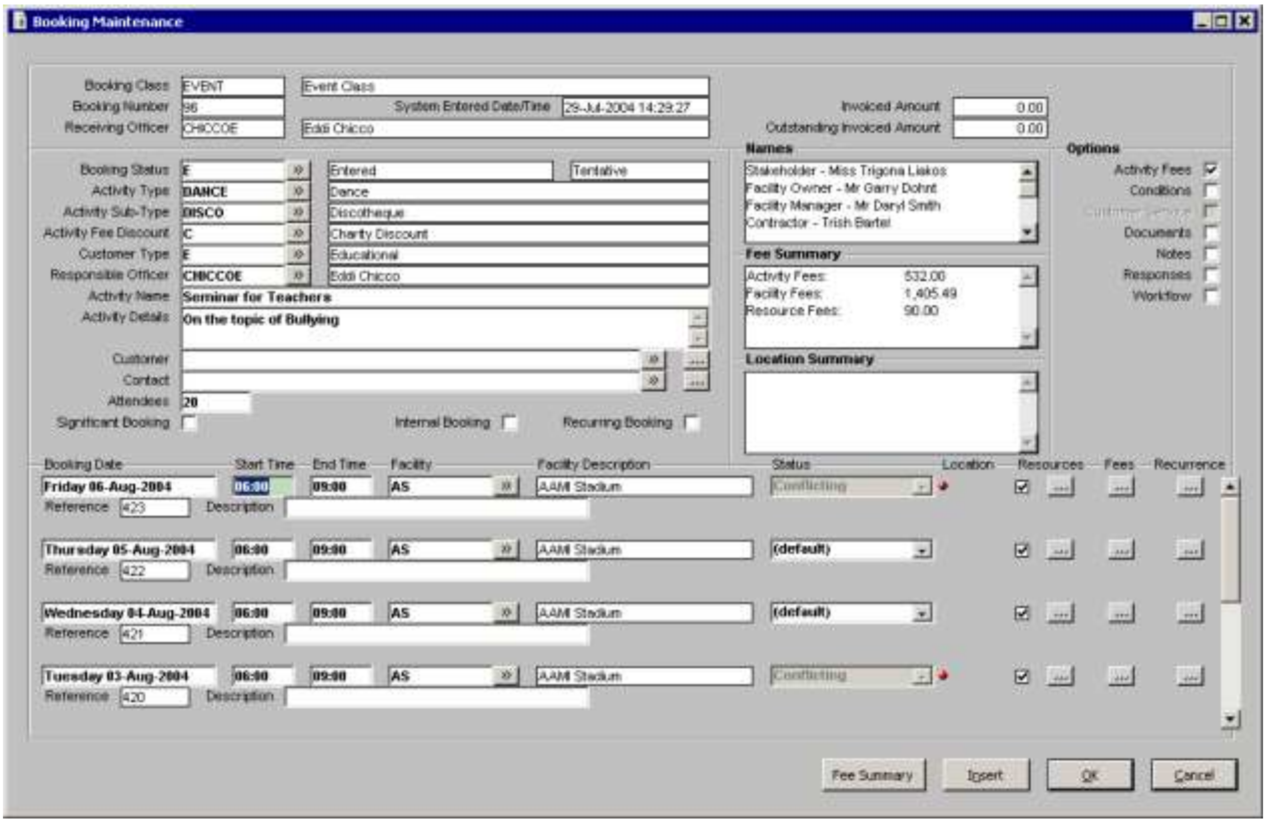
As each Line is being generated via Recurrence Pattern Maintenance, if it conflicts with an existing Line, its Status is set to 'Conflicting'. In addition, the following rules will apply:

- Lines will be set to a 'Conflicting' Status during the Recurring Booking generation process, i.e. users cannot manually set a Line to this Status.
- Users can, however, use QBF to find 'Conflicting' Lines on a large Booking.
- A Line's Status can be changed from 'Conflicting' to '(default)' by:
  - Changing the Booking Date or Time
  - Changing the Facility
  - Editing the Locations or Resources appropriately
- A Line's Status may be manually changed to 'Declined' or 'Cancelled'
- 'Conflicting' Lines do not automatically have their Status changed when the Booking they are clashing with is altered or deleted.

Note: Booking Lines with a 'Conflicting' glyph are *not* valid Bookings Lines and require changes (as above) to be made to return the Status to (default) and make the Booking Line valid. Alternatively, a Status of 'Declined' or 'Cancelled' may be applied to the Booking Line. Fees are not generated for a Booking Line with a 'Conflicting' Status.

See further details in Booking Line Processing.

The following form shows Booking Lines generated by the Recurrence Pattern which have a Status of 'Conflicting'. This is indicated by the following glyph on individual Booking Lines ( ):



Booking Maintenance form showing 'Conflicting' Booking Lines

Booking Number

These fields default the Booking Number and Activity Name from the Booking Entry/Maintenance form. These fields cannot be maintained.

Facility

These fields display details of the Facility.

Allow Multiple Bookings

This flag displays the 'Multiple Booking' status of the Facility.

Start Date/Start Time/End Time/ End After X occurrences/ End Date

Initially, these fields will default the Booking Line Date, Start Time and End Time, but these may be changed by the user. Once the number of occurrences is entered, the system will calculate the End Date based on the Daily, Weekly, Monthly or Yearly settings. Alternatively, a Start Date and End Date may be entered and the system will calculate the number of occurrences based on the other parameters. If the Start Date or End Date is modified, then the Number of occurrences able to be scheduled between those dates will be recalculated based on the other parameters.

Daily/Every X Days/Every Weekday

These fields allow the user to specify the pattern of recurrence which the Booking is likely to follow, e.g. Every 2 days, or Every Weekday.

> Note: The user is required to enter a Start Date for the Daily occurrence as well as an End Date or the number of bookings required. One of these must be entered for the calculation to proceed. (see Start Date.. field: 239).

Weekly/Every X week(s)/On (Day of Week)

These fields allow the user to specify the pattern of recurrence which the Booking is likely to follow, e.g. Every 2 weeks on Thursday.

The user is allowed to nominate more than one day on which the event can occur.

Note: The user is required to enter a Start Date for the Weekly occurrence as well as an End Date or the number of bookings required. One of these must be entered for the calculation to proceed. (see Start Date.. field: 239).

Monthly/Day X or every X month/The X Day of every X Month(s)
These fields allow the user to specify the pattern of recurrence which the Booking is likely to follow, e.g. Day 10 of every 2 months; or The second Thursday of every 1 month.

Note: The user is required to enter a Start Date for the Monthly occurrence as well as an End Date or the number of bookings required. One of these must be entered for the calculation to proceed. (see Start Date.. field: 239).

Yearly/Every (Month) (Year)/The X (Day) of (Month)
These fields allow the user to specify the pattern of recurrence which the Booking is likely to follow, e.g. Every June 10, or The second Thursday of June (where the date will differ each year).

Note: The user is required to enter a Start Date for the Yearly occurrence as well as an End Date or the number of bookings required. One of these must be entered for the calculation to proceed. (see Start Date.. field: 239).

Recurring Booking Maintenance Form

Release 3.02 of Pathway includes a new maintenance form to assist with applying multiple updates to Recurring Bookings. This is an Authorised Function.

Currently the maintenance of Recurring Bookings can be a very time consuming task as it requires the user to access and modify each Booking Line individually. The new Recurring Booking Maintenance function has been created to try and simplify this chore.

Restrictions
There are some functional restrictions on just which Booking Lines are available for update. Cancelled or Declined Bookings or any Booking for which some Facility Fees have already been invoiced will not be able to be modified. These Bookings can only be manipulated via the standard Booking Entry function as per the original functionality.

Additionally it is not possible to change the basic structure of the Recurring Booking. If a Booking is for Mondays, Wednesdays and Fridays the user can alter the Times and Resources being Booked on those days, but they will not be able to change the Monday Bookings to a Tuesday for example.

Performance Warning:
There are performance considerations to be aware of with this new function when loading and manipulating a large Recurring Booking. When loading a large Booking it is necessary for Pathway to pre-process all of the Booking Lines before displaying the form. On a very large Booking, this could take some minutes. A progress counter will be displayed on the Information Message line at the bottom of the Uniface session to indicate the progress of the loading process. When flagging Bookings for updates the form performs availability validation processing for all the affected Bookings ‘on the fly’, as this gives the user feedback about any possible Booking conflicts that may occur due to the change. This verification process may also take some time, depending on the number of Bookings being altered. Finally the actual updating of the Bookings will re-verify the Facility and Resource

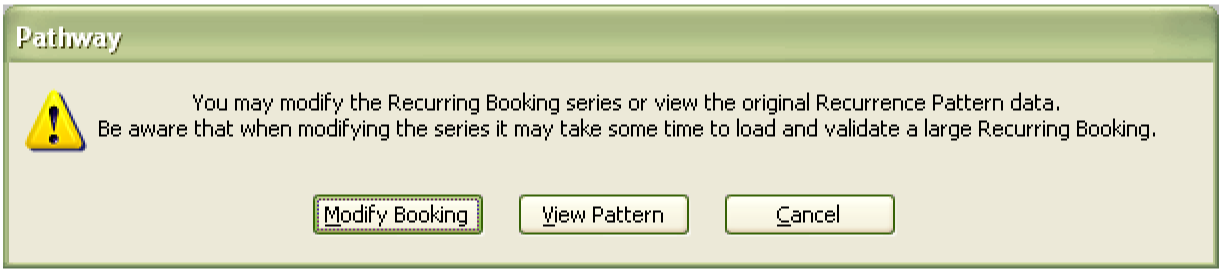
availability and make the actual Booking updates to the database, all of which will again take some time.

Therefore the Recurring Booking Maintenance function is not recommended for casual updates to only one or two Bookings in a recurring series. If you need to modify just one or two Bookings in a recurrence, then it is recommended that you use Booking Entry. However if you need to update a large number of the Bookings then the new Recurring Booking Maintenance function has been provided to accomplish this task more efficiently. With this in mind, the performance issues associated with dealing with large Recurring Bookings is deemed to be acceptable.

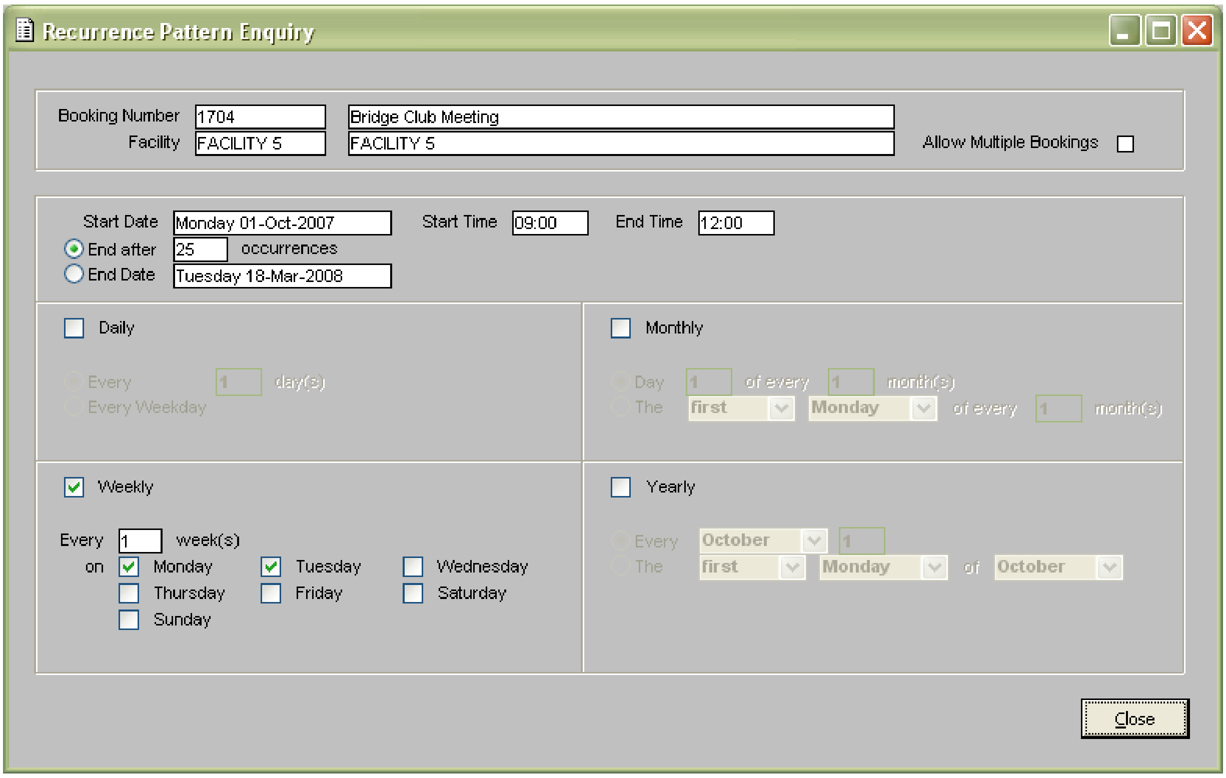
Accessing Recurring Booking Maintenance

When the associated Authorised Function is active the “Recurrence” button on Booking Entry will provide access to the new form.

On a Booking flagged as a ‘Recurring Booking’ where no recurrences have yet been created for a Booking Line, the existing Recurrence Pattern Maintenance form will continue to be shown. This form will allow the user to define the pattern of the Booking and then to generate the Booking Lines for the entire series. This function has not changed in any way. However, when the recurring series already exists then a new message dialog will prompt the user for what they would like to do.

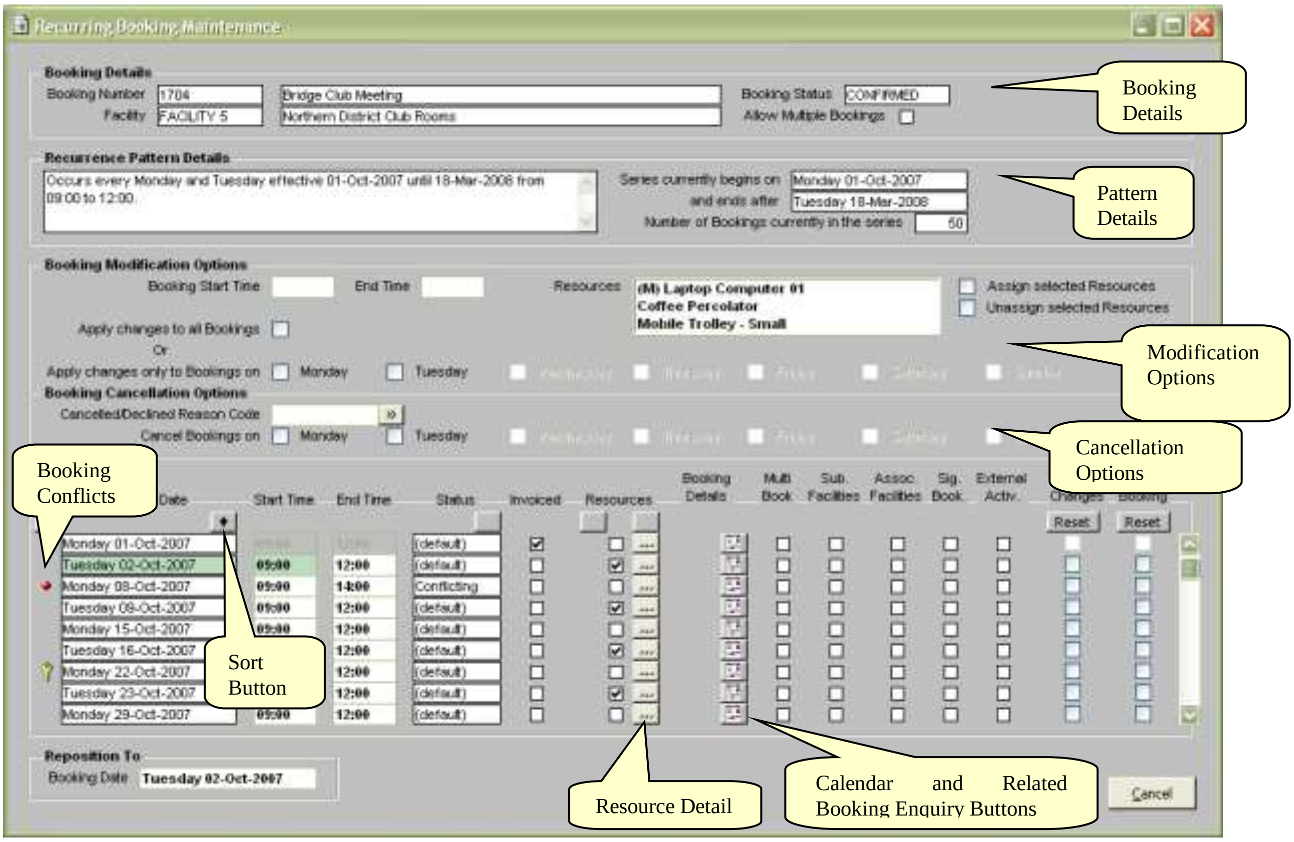


This dialog offers the user access to the new Recurring Booking Maintenance form, or to the Recurrence Pattern Enquiry form. The Recurrence Pattern Enquiry simply displays the basic pattern information and is the function that the user would have seen previously when clicking on the “Recurrence” button for a Booking Line where the recurring series had already been created. The Recurrence Pattern Enquiry will also be shown from Booking Enquiry as the new Recurring Booking Maintenance form has no function in Enquiry Mode.



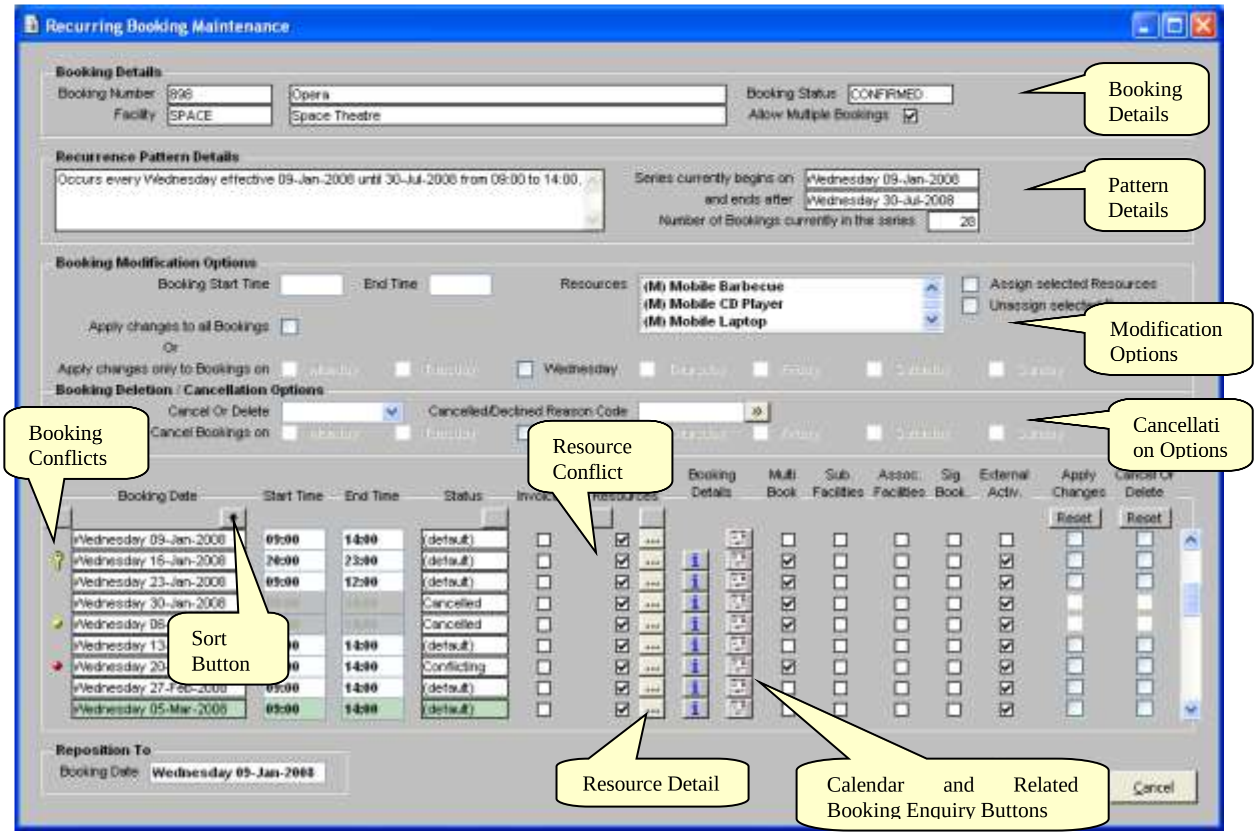
Recurrence Pattern Enquiry

The 'Modify Booking' button however provides access to the new Recurring Booking Maintenance form. (Take note of the warning regarding possible load times for a large Booking)



Recurring Booking Maintenance

The image above shows a sample screen from a Recurring Booking on a Facility that does not allow ‘Multiple Bookings’.



Recurring Booking Maintenance

The image above shows a sample screen from a Recurring Booking on a Facility that allows ‘Multiple Bookings’.

Using Recurring Booking Maintenance

Basic details of the Booking are displayed at the top of the form.

Below this is displayed an English language description of the original Recurrence Pattern data. Next to the Pattern description are fields displaying the dates upon which the Recurring Series currently starts and ends, and the number of Bookings currently in the series.

Next are the **Booking Modification Options** and the **Booking Deletion/Cancellation Options**. These fields and check boxes give the user shortcut methods of applying changes to a large number of Bookings. It is possible to specify an alternative Start and End Time range, select Resources to be added or removed from Bookings, and then click on one or more of the ‘Day’ check boxes to have those updates ‘applied’ to all the Bookings for the selected Day(s).

On the other hand the Deletion/Cancellation options allow the user to select a Cancellation Reason Code and then click on one or more of the ‘Day’ check boxes to have those updates ‘applied’ to all the Bookings for the selected Day(s). The ‘Cancel or Delete’ field allows selection from a dropdown. If ‘Delete’ is selected, a Cancelled/Declined Reason does not have to be entered.

To bulk delete booking lines select Delete and then the days/lines to be deleted. Then click the Update button. To cancel multiple booking lines select the Cancel option, a Cancelled/Declined Reason, and then select the days/lines to be deleted. Again click the Update button to process Cancellations.

Note: The ‘Apply’ and ‘Cancel’ options are mutually exclusive.

Note: When ‘applying’ changes to the Bookings at this time the form only performs validations on the selected Bookings. No actual updates are performed until the ‘Update’ button is pressed. At any time it is possible to unselect any Bookings and have the changes ‘removed’.

Note: When selecting Bookings to have changes applied the form must validate every booking so as to verify the Facility and Resource availability for the modified Bookings. This process may take some time if a large number of Bookings is being flagged for update.

Note: When a Booking line which includes a ‘Charge only Once’ Activity fee is deleted or cancelled, the fee will be applied to the next Activity Charges.

Following the validations, if any Bookings were found to have conflicts on the Facility or on any Resource selected for addition to the Bookings, warning messages will be displayed to alert the user of the situations encountered. Additionally, graphic indicators will be displayed to assist the user in identifying those Bookings on which potential conflicts exist. These indicators are:

Booking Conflict indicators:

- A ‘Red Dot’ identifies those Bookings for which a Facility or Resource Conflict occurs. This Booking cannot be accepted. If the Booking is updated the Status of this Booking will be set to ‘Conflicting’.

- A ‘Yellow Dot’ identifies those Bookings for which another Booking exists at the same time and this Facility allows ‘Multiple Bookings’. This Booking is allowed and will be accepted if the ‘Update’ button is pressed.

- A ‘Yellow Key’ identifies those Bookings where the Start or End Time of the Booking will cross over the normal available times for the Facility. Note that if the Facility is not available at all for the duration of the Booking then this will have been treated as a ‘Conflict’ and will be shown with a ‘Red Dot’.

Resource Conflict indicator

- A ‘Red Dot’ identifies those Bookings where one or more of the additional selected Resources would not be available for the time of the Booking.

Note: When adding Resources via the Resources list box in the Booking Modification Options the Resources are not actually linked to the Bookings until the ‘Update’ button is pressed. Therefore the display of the ‘Red Dot’ indicator shows where a potential Resource Conflict exists. If the user goes to the Resource Selection form by clicking on the Resource Detail button they will only see the Resources that are currently linked to the Booking.

At the bottom of the form we have the Booking Line occurrences displayed. Each occurrence displays the following fields, indicators and buttons: (from the left)

- **Conflict Indicator** – This graphic glyph will display one of three possible icons to assist the user in identifying Bookings that are in conflict.

- **Booking Date** – The Date of the Booking. This is display only and cannot be modified on this form.

- **Start Time and End Time** – The duration of the Booking. These fields will be modified via the Booking Modification Option check boxes but may be modified individually if required. When modifying these fields manually the form will perform Facility and Resource availability validation at the time the changes are made.

- **Status** – A text description of the current, or proposed, Booking Line Status.
- **Invoiced** – A checkbox glyph that will indicate if this Booking has any Facility or Resource Fees that have been invoiced. If any Invoiced Fees exist this Booking will not be available for modification.
- **Resource Conflict Indicator** – This graphic glyph will display a 'Red Dot' icon if any of the Resources selected on the Booking Modifications Options for addition to the Bookings are not available at the time of the Booking.
- **Resources Linked** – A checkbox glyph that will indicate if this Booking Line has any Resources currently selected.
- **Resource Detail Button** – A command button that provides access to the Booking Line Resource Selection form. This form can be used to view the Resources currently assigned to a Booking. Additionally the user can manually select Resources to be assigned. Note that if the user does make manual changes to the Resources assigned to a Booking Line those changes are actually performed on the database, although uncommitted. When returning to the Recurring Booking Maintenance form the 'Apply Changes' check box will be checked 'ON' and both the 'Apply Changes' and 'Cancel Booking' check boxes will be dimmed and can no longer be changed. This is necessary to ensure that the pending updates to the Booking Line Resources are correctly handled when the 'Update' or 'Cancel' buttons are pressed.
- **Related Booking Button** – This command button will be displayed if the Booking has any 'Related' Bookings that may impact upon it. Clicking on this button will provide access to the standard Related Booking Enquiry form.
- **Calendar Detail Button** – A command button that provides access in Enquiry mode to the standard Booking Calendar forms.
- **Related Booking Indicators** – A set of checkbox glyphs that indicate the existence of other Related Bookings that may impact upon this Booking. The displayed indicators are:
    - **Multi-Book** – Checked 'On' if any other Booking for this Multi-Book Facility occurs on the same day.
    - **Sub Facilities** – Checked 'On' if any other Bookings for the Parent Facility or sibling Sub-Facilities of this Sub-Facility occur at the same time.
    - **Associated Facilities** – Checked 'On' if any other Bookings for Associated Facilities of this Facility occur at the same time.
    - **Significant Booking** – Checked 'On' if any other 'Significant' Bookings occur at the same time.
    - **External Activity** – Checked 'On' if any External Activity occurs at the same time.
- **Apply Changes** – A check box that selects the Booking Lines to be updated. This check box may be selected, or unselected, manually as required by the user. When selected and checked 'On' the form will perform Facility and Resource availability validation for the Booking.
- **Cancel Booking** – A check box that selects the Booking Lines for cancellation. This check box may be selected, or unselected, manually as required by the user.

Above the Booking Line occurrences are a number of command buttons.
The function of these buttons is: (from the left)

- **Conflict Sort Button** – This button allows the user to sort the Bookings by the Conflict indicator value. This has the effect of bringing all Bookings with displayed conflict indicators to the top of the display. This can assist the user in reviewing all Bookings that are in conflict or have warnings.

- **Booking Date Sort Button** – This button allows the user to sort the Bookings by Booking Date, both in ascending and descending order.

- **Status Sort Button** – This button allows the user to sort the Bookings by Booking Status, both in ascending and descending order.

- **Resource Conflict Sort Button** – This button allows the user to sort the Bookings by the Resource Conflict indicator. This has the effect of bringing all Bookings with displayed conflict indicators to the top of the display.

- **Resource Linked Sort Button** – This button allows the user to sort the Bookings by the ‘Resources Linked’ indicator, both in ascending and descending order.

- **Apply Changes Reset Button** – This button provides a shortcut method of unselecting all the ‘Apply Changes’ check boxes.

- **Cancel Booking Reset Button** – This button provides a shortcut method of unselecting all the ‘Cancel Booking’ check boxes.

At the very bottom of the form is a ‘Reposition To’ Booking Date field. Entering a value into this field will cause the Booking Line occurrences to be repositioned to that date or to the nearest date if the entered date is not found. (When using the ‘Reposition To’ field the Bookings will first be sorted into ascending Booking Date order). Focus will move to the specified Booking Line when the user tabs out of the field.

Finally we have the ‘Update’ and ‘Cancel’ buttons.

When clicking on the ‘Cancel’ button all pending updates are ignored and the form returns to Booking Entry. If the user has manually assigned any Resources then the normal “Data has been modified. Do you want to Store?” message dialog will be shown. If the user answers ‘No’ then the updates are ignored and the form returns to Booking Entry, however if they answer ‘Yes’ then this is equivalent to having clicked on the ‘Update’ button and all the associated processing will be performed, as described below.

When clicking on the ‘Update’ button the user will first be prompted to confirm that they really want to apply the pending Updates and Cancellations to the selected Bookings. If they answer ‘No’, then control returns to the Recurring Booking Maintenance form. If they answer ‘Yes’, then the following processes are performed:

- **Validation** – All Bookings selected for update will be re-validated. This ensures that we minimise the possibility of the inadvertent creation of a ‘double booking’. If any of the Bookings are found to be in conflict then warning message dialogs will be shown. The user will then have the option of proceeding with the Update, or of returning to the Recurring Booking Maintenance form where the Conflict Indicators will identify the Bookings now in conflict. If all Bookings are OK, or the user responds ‘Yes’ to any of the warning messages, then processing continues.
  Note that the validation process may take some time, depending on the number of Bookings selected for update.

- **Update** – Following re-validation the actual updates are performed on all Bookings selected. Bookings flagged with the ‘Apply Changes’ check box will have any Booking Time modifications and Resource assignment performed. Bookings flagged with the ‘Cancel Booking’ check box will have their status set to ‘Cancelled’.

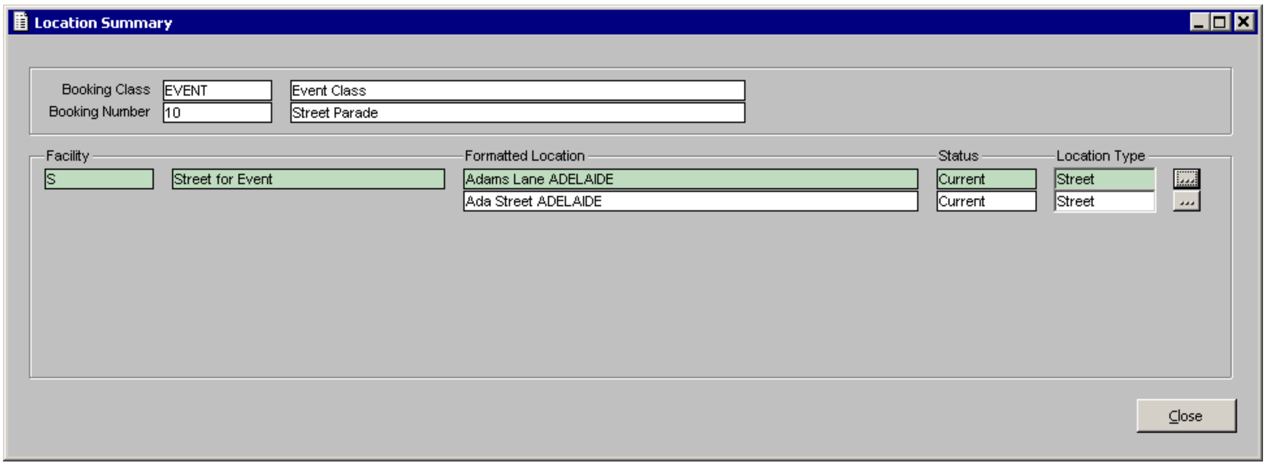
- **Fee Processing** – Following the update of all the selected Bookings, all Facility and Resource Fees for the affected Bookings will be re-generated. Following this step Activity Fees will be re-calculated for the Booking.
  Note that the Fee processing may take some time, depending on the number of Bookings selected for update.

Note: When processing Activity Fees it is possible that the modified Bookings may have implicitly modified the Activity Fees for a Date on which some or all Activity Fees have already been invoiced. If this situation occurs then the standard Booking warning message alerting the user to the need to review Activity Fees for Credit or Adjustment will be shown. This is the same behaviour that occurs when modifying Booking Lines in Booking Entry when Activity Fees have already been invoiced, and should be reviewed in the same way.

Once the update processing has completed control will return to Booking Entry. The details of the displayed Booking will be refreshed at this point and will reflect any changes applied by the Recurring Booking Maintenance form.

Location Summary Form

Double-clicking (or pressing F2) in the Location Summary box on the Booking Entry/Maintenance form displays the Location Summary form where Location details may be viewed for the Booking.



Location Summary form

Booking Class

These fields display details of the Booking Class related to the Booking Request. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number

These fields display the Booking Number and Activity Name.

Facility

These fields display the Facility Code and Description, e.g. S, Street for Event. These fields cannot be maintained.

Formatted Location

These fields display formatted details of the Facility Location (either Property_Address or Street/Suburb Location).

Status
This field displays the Location Status (e.g. Current, Historic etc)

Location Type
This field displays the type of Location (e.g. Property or Street/Suburb).

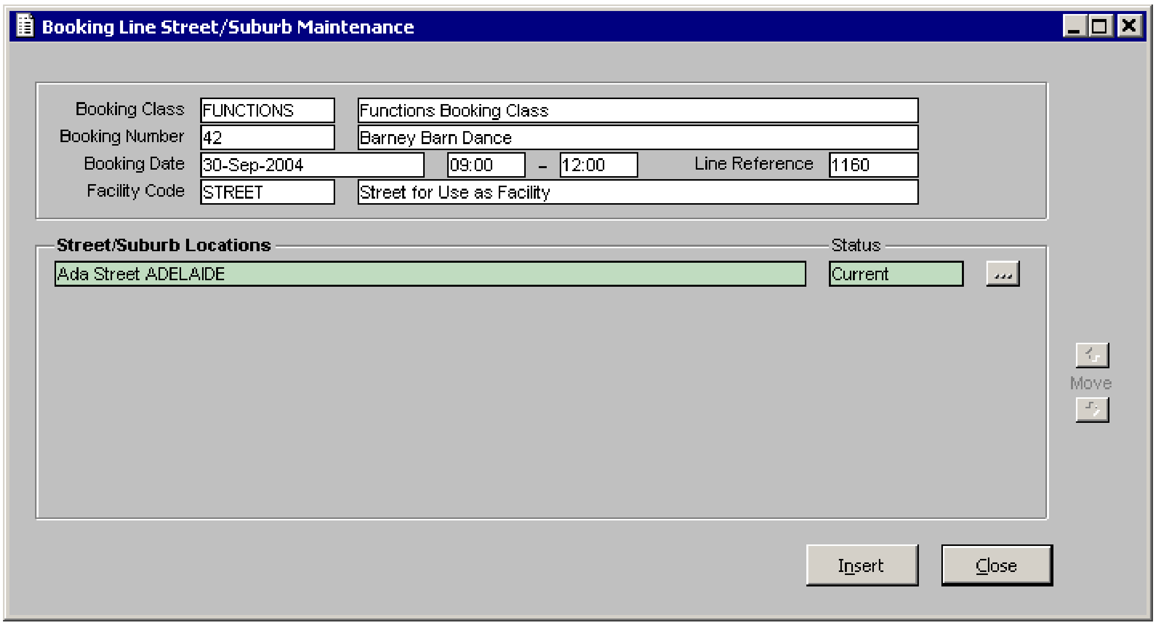
Detail button
Selection of the Detail button allows the user to detail out to the Property Summary form or Street Enquiry form within the Property module to view further details of the Location.

Booking Line Street/Suburb Location Maintenance Form

The Location button becomes available when a General Purpose Facility has been selected for the Booking Line, and a Street/Suburb Location is required to be associated. This form displays when the Location Detail button is selected on a Booking Line. (Note: This button is normally not visible and will only display if the Facility is a General Purpose Facility).

When Street/Suburb Locations are added to a Booking Line, the system checks to see if the Street/Suburb has been linked to another Booking regardless of Class. If there is an existing Booking then a warning will display to the user indicating that Bookings are already linked to this Street/Suburb. The user then has the option of closing the message and returning to the Booking Request, or viewing the other Booking Requests that have been found to be occurring at the same time.

Adding a Street/Suburb Location for which a conflicting Booking exists is only allowed if both the current Line's Facility and the conflicting Line's Facility are 'multi-book'.



Booking Line Street/Suburb Location Maintenance Form

Booking Class
These fields display details of the Booking Class associated with the Booking Line. These fields are display only.

Booking Number/Activity

These fields display the Booking Number and Activity associated with the Booking Line. These fields are display only.

Booking Date/Time
These fields display the date on which the Booking is to occur, as well as the Start and End Times. These fields are display only.

Line Reference
This field displays the Booking Line Reference Number. This field is display only.

Facility
These fields display the facility details for the Booking Line.

Street/Suburb Locations
These fields list the Street/Suburb Locations selected to be associated with the Booking Line Facility.

Status
This field displays the Status of the Street/Suburb Location, e.g. Current, Historic etc.

Detail button
Selection of the Detail button displays the Street Enquiry form where the user may view further details of the Street/Suburb Location.

Booking Fee Summary Form

Once Booking Lines have been added in Booking Entry/Maintenance and the associated costs reviewed, then the user is able to access the Fee Summary form. This form allows the user to view all fees which apply to the Booking. The fees are displayed in ascending date order and list various details relating to the fees.

Note: If the Accounting Method is set to 'Debtors' for a Booking but has an override of 'Cash', the following rules will apply:

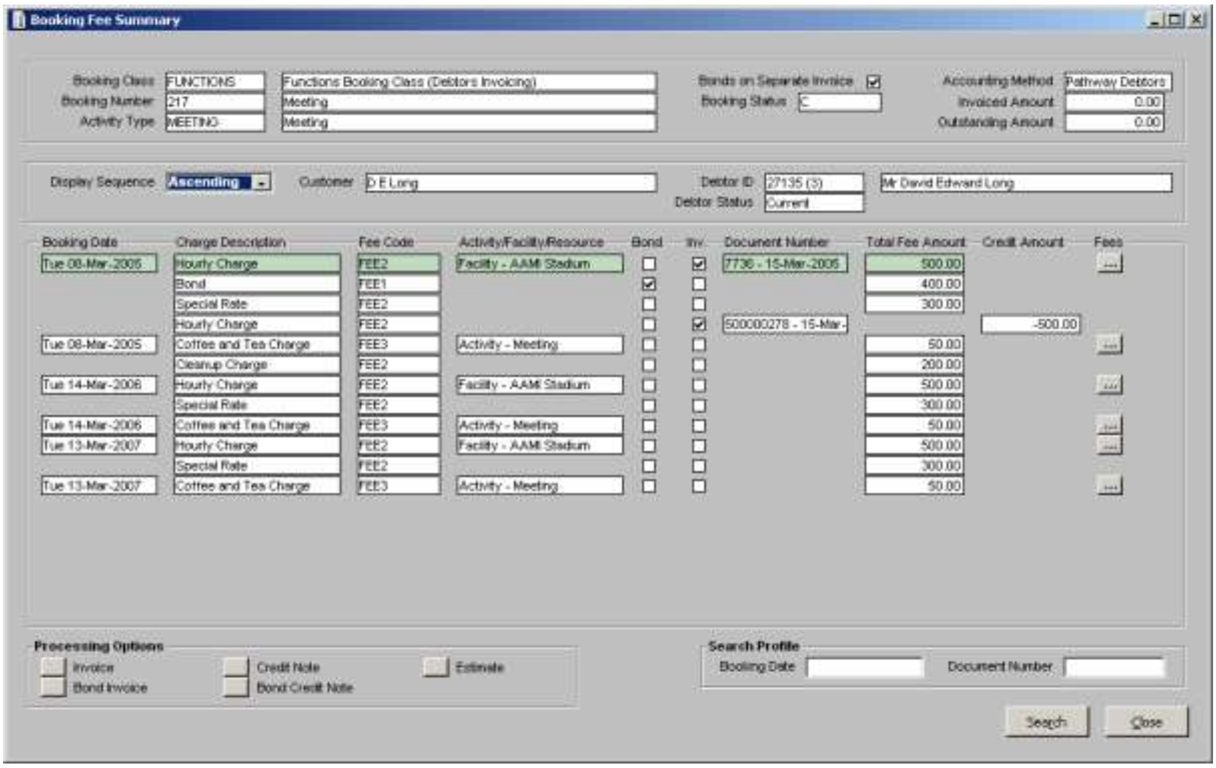
- If you create a Booking where the Accounting method is set to 'Debtors', then there will be no reference to Cash anywhere and all validations will force a Debtor to be selected before an invoice can be raised.
- However, if the Accounting method is changed to 'Cash' at any time up to the point of raising an Invoice on any Fee, then as soon as a Fee has been invoiced, the Accounting Method will become locked.

Pathway Debtors Invoicing
In Debtors mode, the user is able to select one or many lines and then generate the appropriate Debtor transactions. The following Debtor transactions are available: Invoice, Bond Invoice, Credit Note and Bond Credit Note.

The first Customer name against the Booking Request is used to generate the invoice. If all validation is successful then an invoice will be generated using a nominated Merge Type. The transactions will be generated in Debtors and the Document Print function allows the invoice to be printed. An Invoice Number is allocated to the invoice through the Debtors Module, and this number will display, along with the date, in the Document Number field.

Note: If the Debtor has a suspended status, then an Invoice/Credit Note will not be able to be generated. The following message will display: "The Debtor Id xxxxx has been Suspended. Invoicing cannot be performed for a Suspended Debtor". Similarly, if the credit limit for a Debtor has been exceeded then the following message will display: "The Credit Limit for Debtor xxxx (x) has been exceeded. Do you wish to continue?

If Discount has been applied to a Fee Charge (and the ‘Allow Discount’ flag has been checked ON for the Fee Type), then when the Fee Charge is invoiced, the Discount amount will be applied to the ‘Discount’ Account and the gross amount (before discount) will be applied to the Revenue Account. When a Credit Note is raised, the opposite transactions will occur.



Booking Fee Summary Form using Pathway Debtors Accounting Method

Cash Invoicing
In Cash mode, the user is able to select one or many lines and then generate the appropriate Cash transactions. The following Cash transactions are available: Invoice, Bond Invoice, Refund and Overpayment Allocation.

The first Customer name against the Booking Request is used to generate the invoice. If all validation is successful then an invoice will be generated using a nominated Merge Type. The transactions will be generated and the Document Print function allows the invoice to be printed. A Cash Invoice Number is allocated to the invoice, and this number will display, along with the date, in the Document Number field.

Receipting in Cash mode
Receipts will use the following:

- Receipting Application – BK
- Reference – Booking Number (mandatory)
- Qualifier – Invoice Number (optional)

If money remains after the invoice has been paid off, then the money will be processed to any additional invoices that are outstanding. If there is still an amount remaining then the amount will be moved to “Overpayments”. An ‘Overpayments’ line, which will have a negative value, will be added to the Charge lines in the Fee Summary form to record the fact that additional monies have been paid on the Booking.

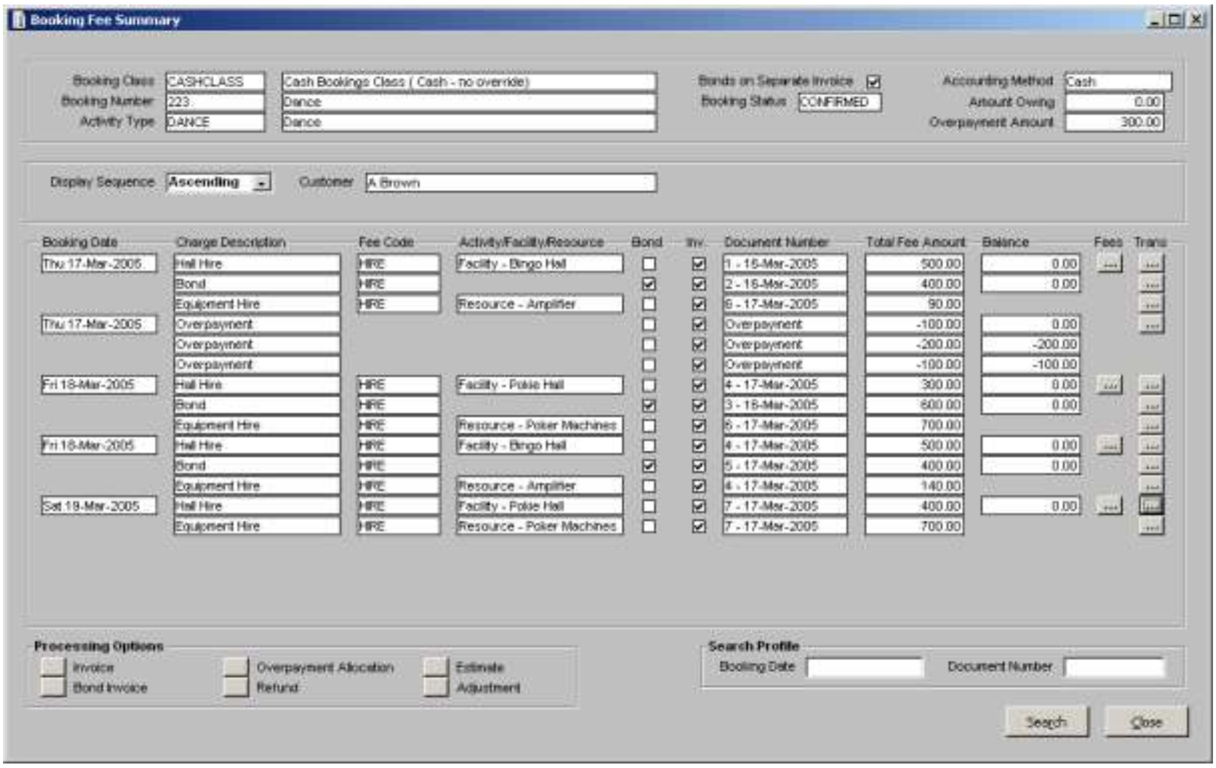
If there is an ‘Amount Owing’ on the Booking, the ‘Overpaid Amount’ may be dealt with in the following ways:

- If you exit the Fee Summary form when an ‘Overpaid Amount’ exists, a query message will ask if you want to have the Overpaid Amount automatically allocated to the Outstanding Fees. If this allocation is not performed at this point, this same question will be asked again by the main Booking Entry form when you exit that form.

- Alternatively, you can select individual Fees with Outstanding Amounts on the Fee Summary form and click on the ‘Overpayment Allocation’ button to have the Overpaid Amount allocated to the selected Fees.

Receipt Reversals and Transfers are conducted via Receipting with The Bookings Management module managing the transaction.

See further details in Bookings Receipting



Booking Fee Summary Form using Cash Invoicing Accounting Method

Booking Class

These fields display details of the Booking Class related to the Booking Request. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number

These fields display the Booking Number and the Activity description. These fields are display only.

Activity Type

These fields display details of the Activity Type, e.g. D, Dance. These fields are display only.

Booking Status

This field displays the Booking Status Code which corresponds to one of the following system statuses:

- Confirmed
- Tentative
- Available for Booking
- Awaiting Response

Bonds on Separate Invoice

This flag indicates whether Bonds are to be invoiced separately.

Note: Bonds are credited to the customer by using the Bond Credit Note processing, The user may select the invoiced Fee (i.e. Bond) that is to be credited and then the Bond Credit Note option to generate the document and the Debtors transactions.

Invoiced Amount/Amount Owing

This field displays the total amount that has been invoiced for the Booking. For Cash Invoicing, this field will display the 'Amount Owing' which is calculated based on the Fee amounts recorded against the Booking, subtracting any Payments received via Receipting.

Outstanding Amount/Overpayment Amount

This field displays the amount which is still outstanding for the Booking, i.e. the amount which is still left to pay.

When a payment is made through Debtors Receipting, the Receipt amount is deducted from the Invoiced Amount and displayed in the Outstanding Amount field.

For Cash Invoicing, this field will display any 'Overpayment Amount'.

If additional fees are added to a Booking and invoiced, then the Outstanding Amount will be updated to reflect this change. If an Overpayment Amount exists, then the user will be prompted with a message asking if an auto-allocation of the overpayment should occur. If the user responds 'Yes', then the overpayment amount will be allocated to the new fees that have been raised. If the response is 'No' then no auto-allocation of the overpayment will occur. However, the user will be able to access the Overpayment Allocation button and nominate the fees that should be paid using the overpayment amount.

Display Sequence

This field allows the user to specify a display sequence to display the fees in either ascending or descending sequence. The default sequence is Ascending.

Customer/Debtor ID/Debtor Name/Debtor Status

The Customer field will display the Customer who has been set up as the Debtor for the Booking. This will normally be the first Customer if a number of Customers exist. The Customer must have a valid Debtor ID number which will display in the Debtor ID field and the Debtor Name will display alongside it. If more than one name is associated with the Debtor ID then these will display here in concatenated format. If more than 2 names exist then this field will display as "Mr John Smith and Others".

If a valid Debtor number does not exist, then the user will be able to set one up before proceeding with the invoicing. The Debtor Status field displays the Status of the Debtor record, which will inform the user of the ability to invoice the Booking Fees to this Customer. The available options are as follows:

- Current
- Historic
- Proposed
- Suspended

Only a Status of 'Current' is valid for Bookings invoicing purposes.

In Cash Invoicing mode only the Customer details will display. There will be no Debtor information.

Booking Date

This field displays the date of the Booking Line in the following format: Friday 25-Jun-2004. The Display Sequence uses this field along with the (hidden) Line Reference field to order the Charge Lines.

Charge Description

This field displays a description of the Charge, e.g. Hire of Facility.

Fee Code
The Fee Code field displays the Fee code which is associated with the Charge Line, e.g. FEE3.

Facility/Resource
This field displays details of whether the Charge is a Facility charge or a Resource charge, e.g. Facility – Room 1.

Bond/Invoiced
These flags indicate whether the Charge is a Bond charge which will need to be refunded at a future date, and whether the Charge has already been invoiced.

Document Number
This field only displays if a Charge Line has been invoiced where it will display the Document/Invoice number and date of invoicing. In Cash Invoicing mode, the Invoice Number will be the next Invoice Number for the Class. This number sequence is unique only within the Class, whereas Debtors Invoice Numbers are unique across all Classes.

Total Fee Amount
This field displays the total amount of the Charge Line.

Credit Amount/Balance
This field displays the amount which has been credited either via the Credit Note option or the Bond Credit Note option. It will be a negative amount.

If the Booking is in Cash mode, this field will display the 'Balance' which is due if the Charge has been invoiced. If the Charge has been Adjusted (using the Adjustment option button), then this balance may have been reduced by the adjusted amount. (Details of the Adjustment can be viewed using the Transaction button.)

Fees Button
Selection of the Fees detail button displays the Booking Line Fee Maintenance form showing all the items making up the total amount for the Charge.

Transactions Button
Selection of the Transactions Detail button displays the Fee Transaction Enquiry form showing details of the related Transaction.

See also Fee Transaction Enquiry Form.

Processing Options
The Processing Options buttons allow the following processing options:

In Debtors Invoicing mode:

- Invoice
- Bond Invoice
- Estimate
- Credit Note
- Bond Credit Note

In Cash Invoicing mode:

- Invoice
- Bond Invoice
- Overpayment Allocation
- Refund
- Estimate
- Adjustment

Selection of the **Invoice** button checks whether any of the selected Fees have already been invoiced. A check is also made on the Status of the Booking Line. Only a Status of 'Confirmed' will allow an invoice to be generated. If validation is correct then the Invoice Merge Type Selection form is displayed to allow the user to select a Merge Type for the Invoice. Once a valid Merge Type is selected and the credit limit for the Debtor is validated, the invoice is generated, and the 'Invoiced' flag is checked On for the related fee. The document may be accessed via the Booking Maintenance form and clicking the Documents flag (or selecting the Documents option via the Options Menu on the top menu bar.)

Selection of the **Bond Invoice** button checks whether the Fee being invoiced is a Bond Fee. If it is, then further processing can occur. Selection of the Bond Invoice button displays the Merge Type Pop Up form to enable the user to select a 'Bond Invoice' Merge Type and generate a document. The document may be accessed via the Booking Maintenance form and clicking the Documents flag (or selecting the Documents option via the Options Menu on the top menu bar.)

The **Estimate** option button may be used for producing a quotation document containing estimate charges for the Booking. Selection of the Estimate button displays the Merge Type Pop Up form to enable the user to select an 'Estimate' Merge Type and generate a document. The document may be accessed via the Booking Maintenance form and clicking the Documents flag (or selecting the Documents option via the Options Menu on the top menu bar.)

The **Credit Note** option button allows fees to be credited to the customer. The user is required to select from the Fee Summary screen the fees against which the credit is to be issued and then select the Credit Note option button. The software will perform various validation checks to ensure that the credit can be processed:
The Debtor linked to the original Fee will be validated to ensure that they are not suspended
The Fee Code will be checked to ensure that a valid Debt Type is linked

If the above validation is successful, the user is required to enter the credit to be applied and a Credit Note Description to identify the reason for the credit. The enables the generation of the Credit Note document.

If the Credit Note processing is successful then a new Fee Line is added against the Booking Request created with the Fee Code that has been credited. The amount entered by the user as the credit amount is stored as the Total Cost of the Fee, e.g.

3 Jan, 2004	HIRE	100
3 Jan, 2004	HIRE	-20

Two transactions will be displayed, the original invoice generated for $100 and a subsequent Fee Line showing the credit that was applied. In total, the outstanding amount on the Fee is $80.

Bonds are refunded to the customer using the **Bond Credit Note** Processing. The user is required to select the Fee (i.e. Bond) and then select the Bond Credit Note option button to process the transaction. A Bond template will be used for generating the Credit Note in this instance.

All Fee Types, e.g. Fixed, Daily and Hourly, are able to be credited.

Note: The amount that is credited against the Booking will only be credited against the Debtor for the specified Booking. The credit amount against the Debtor will not be apportioned against other outstanding debts.

Cash Invoicing
In Cash mode, the Credit Note button is replaced by an Overpayment Allocation button and the Bond Credit Note button is replaced by a Refund button.

The **Refund** option works similarly to the Credit Note function where the user selects the Fees that are required to be refunded. The Refund option is then selected and the user is required to nominate a reason and the amount to be refunded. A Refund document will be printed as a result of this process. Appropriate GL entries are created when the Refund option is selected.

The **Overpayment Allocation** button may be used to allocate any Overpayment Amounts to any remaining invoiced Fees with Outstanding Balances.

If an Overpayment Amount exists, then the user is prompted with a message asking if an auto allocation of the overpayment amount should occur. If they respond YES, then the overpayment amount is allocated to the new fees that have been invoiced.

If they respond NO, then no auto allocation of the overpayment amount will occur.

The user is also able to manually select the Fees to which to apply the Overpayment funds and select the Overpayment Allocation option to perform the action.

This will reduce the overpayment amount and pay off the selected invoiced Fees. Clicking the Overpayment Allocation button with no Fees selected will allocate the funds to all invoiced Fees with Outstanding Balances (in a top-down fashion) until the funds are exhausted.

See also Overpayment Amount.

The **Adjustment** button allows an Adjustment to be raised against any invoiced Fee that has an 'Amount Owing'. The Amount Owing on a Fee may be adjusted by any amount up to the balance of the 'Amount Owing'.

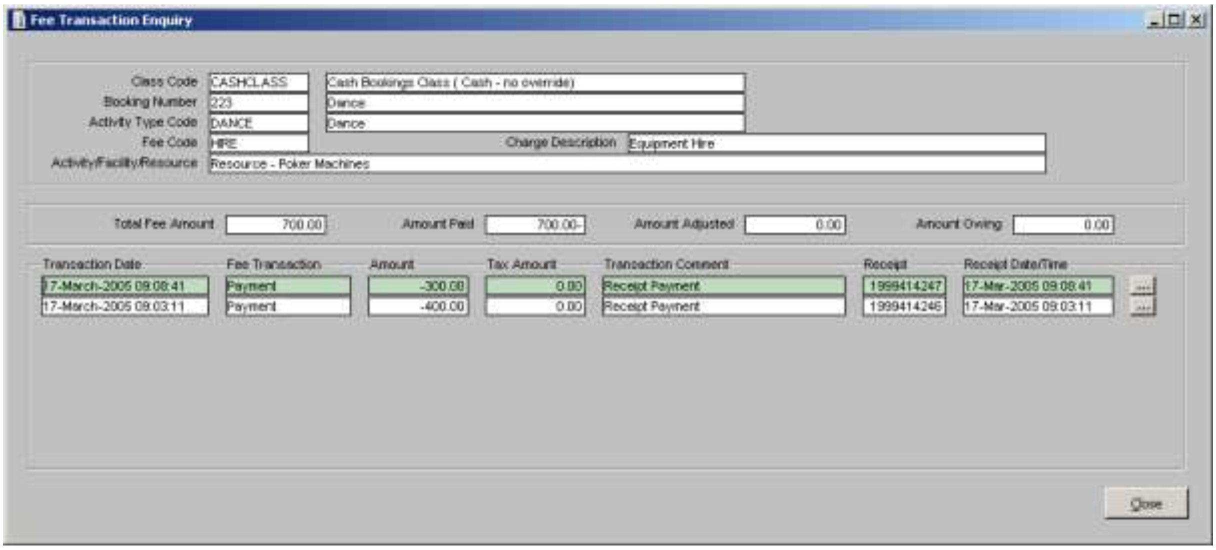
See also Adjustment Details Entry Form.

Search Profile – Booking Date/Document Number

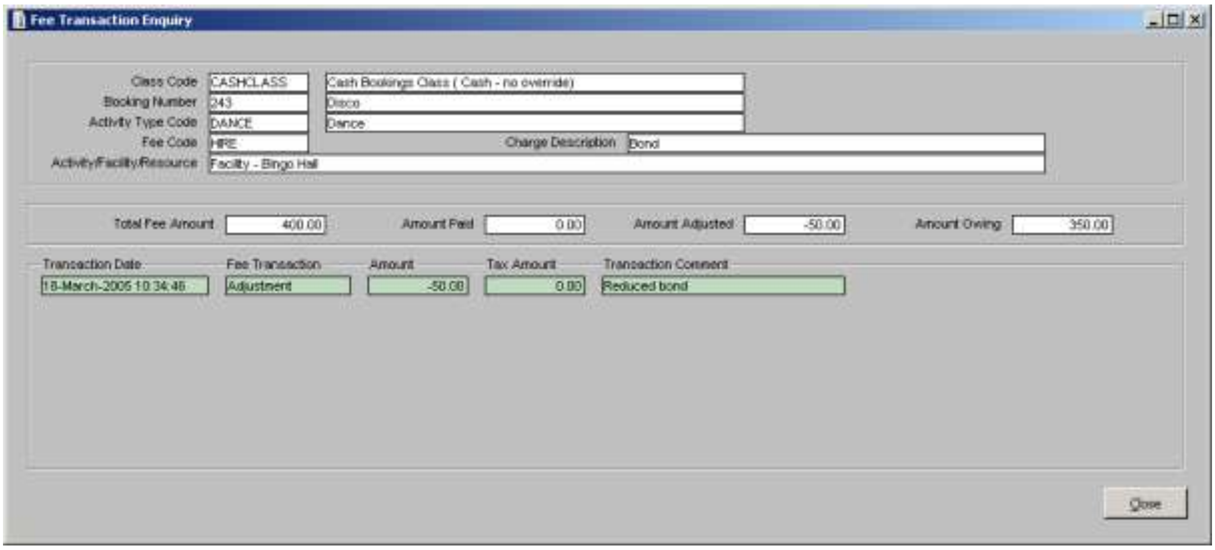
Enter a Booking Date and/or Document Number on which to base your search and then select the Search button.

Fee Transaction Enquiry Form

This form displays when the Transaction Detail button is selected against a Charge line on the Booking Fee Summary form. It displays details about the related transaction (displayed in descending date sequence).



Fee Transaction Enquiry Form showing receipted charges



Fee Transaction Enquiry form showing an Adjustment to a Charge

Class Code/Description

These fields display details of the Booking Class (i.e. Class Code and Class Description) for the Charge line included in the Transaction.

Booking Number/Activity Name

These fields display details of the Booking Number and Activity Name for the Charge line included in the Transaction

Activity Type Code

These fields display the Activity Code and Description related to the Charge line included in the Transaction.

Fee Code

This field displays the Fee Code related to the Charge line included in the Transaction.

Charge Description

This field displays the Charge Description related to the Charge line included in the Transaction.

Activity/Facility/Resource

This field displays details of either the Activity, the Facility or the Resource depending on the nature of the Charge line involved in the Transaction.

Total Amounts

These fields display overall total amounts for the Transaction. This includes:
Total Fee Amount – The total amount of the Charge line
Amount Paid – The amount receipted
Amount Adjusted -
Amount Owing – The amount outstanding (i.e. not yet receipted) on the Charge line

Transaction Date

This field displays the Date/Time on which the Transaction took place. Transactions will be listed in Descending Date/Time sequence.

Fee Transaction

This field displays details of the nature of the Transaction, e.g. Payment, Reversal, Transfer Out.

Amount

This field displays the Allocation Amount of the Transaction.

Tax Amount
This field displays any Tax Amount included on the Allocation Amount of the Transaction.

Transaction Comment
Descriptive comments are displayed in this field to identify the nature of the Transaction, e.g.

- *TRANSFER*
- Allocation of Overpaid Amount
- Receipt Payment

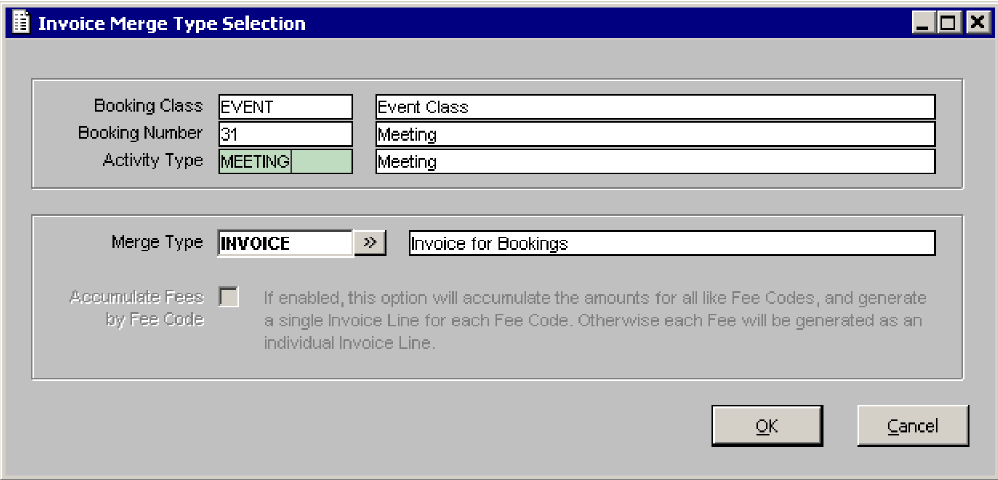
Receipt
This field displays the Receipt Number associated with the Transaction, if applicable.

Receipt Date/Time
This field displays the Date/Time on which the Receipt was issued. At times, this Date/Time will be the same as the Transaction Date/Time, however, for Reversals and Transfers, the Transaction Date/Time will differ from the Receipt Date/Time.

Detail Button
Selection of the Detail button will display the Receipt associated with the Transaction.

Invoice Merge Type Selection Form

This form displays when the Invoice, Bond Invoice and Estimate Options Buttons are selected. It allows a Merge Type to be selected for the generation of an Invoice, Bond Invoice, Estimate, Credit Note or Bond Credit Note. (Merge Types require to have been previously created via Bookings Parameters)



Invoice Merge Type Selection form

Booking Class
These fields display details of the Booking Class related to the Booking Request. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number
These fields display the Booking Number and Activity.

Activity Type
These fields display details of the Activity Type, e.g. M, Meeting..

Merge Type

These fields allow a Merge Type to be keyed in, or, alternatively, one may be selected from the list of available Merge Types. This Merge Type will be used to produce the Invoice/Estimate etc. The default Merge Type will be the first one alphabetically in the list of available Merge Types.

Accumulated Fees by Fee Code

If this flag is enabled (checked ON) it will accumulate amounts for all similar fee codes, and generate a single fee line for each Fee Code. Otherwise each Fee will be generated as an individual invoice line.

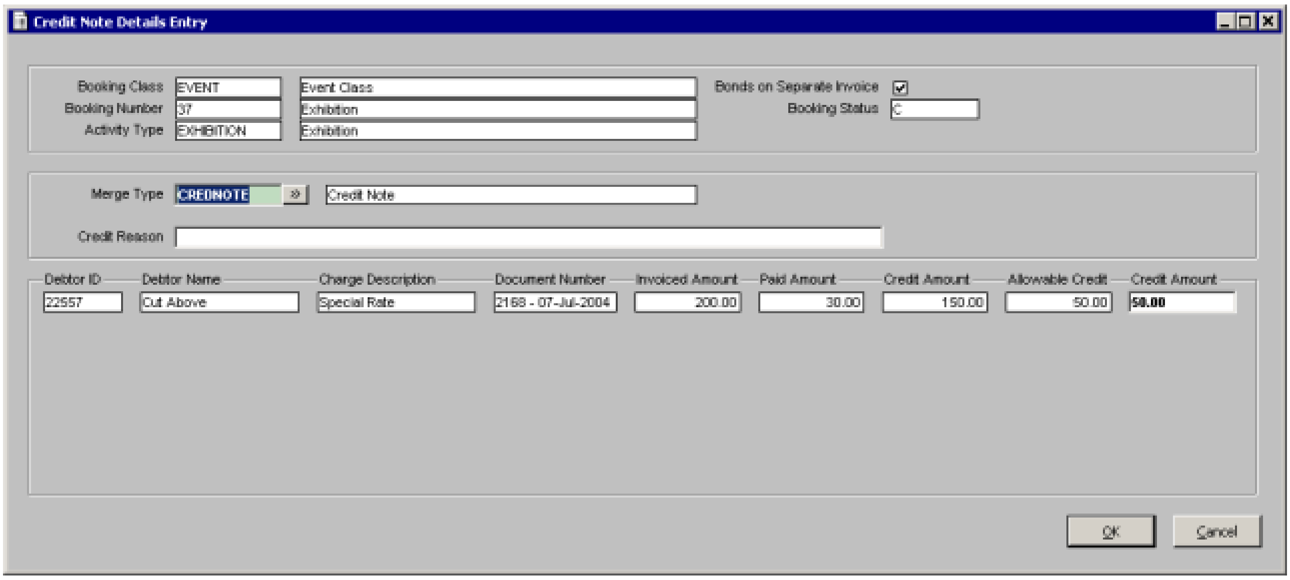
Note: If a Fee Code exists amongst the Fees selected for invoicing, which has an override account set up, then this function will be dimmed and unable to be selected.

Credit Note Details Entry Form

The Credit Note Details Entry Form displays when the Credit Note option button is selected on the Booking Fee Summary form. It allows an invoiced Charge Line to be credited.

At times the Credit Note function may fail with an error, e.g. if the user attempts to credit more than the amount remaining on the invoice for the Charge Line. In such a case the user may be presented with the following message and may be required to make certain corrections:

> The creation of the Debtors Batch for this Invoice/Credit has failed with a status of -29 (Errors occurred in Batch Header record 1081.)
>
> It will be necessary for you to locate the incomplete Debtors Batch, if it exists, using Menu Option: Debtors >> Batch Processing Functions >> Batch Document Maintenance, and identify the nature of the error. You must then delete this unprocessed Debtors Batch, and reselect the required Booking Fees and re-process the Invoice/Credit from within Bookings.



Credit Note Details Entry form

Booking Class

These fields display details of the Booking Class associated with Fee. This consists of a Class Code of up to 10 characters to identify the Class e.g. EVENT or FACILITY and a Description of up to 50 characters e.g. Event Bookings or Facility Bookings. These fields are display only and cannot be maintained.

Booking Number
These fields display the Booking Number and Activity associated with the Fee.

Activity Type
These fields display details of the Activity Type, e.g. D, Dance.

Bonds on Separate Invoice
This flag indicates whether Bonds are to be invoiced separately. If this flag is checked ON, then any Bond Charge applying to the Booking Request must be invoiced separately using the Bond Invoice option. The Bond charge cannot be included on a general invoice with other charges.

> Note Bonds are credited to the customer by using the Credit Note processing, The user may select the invoiced Fee (i.e. Bond) that is to be credited and then the Credit Note option to generate the document and the Debtors transactions.

Booking Status
This field displays the Booking Status Code which corresponds to one of the following system statuses:

- Confirmed
- Tentative
- Available for Booking
- Awaiting Response

Merge Type

These fields allow a Merge Type to be keyed in, or, alternatively, one may be selected from the list of available Merge Types. This Merge Type will be used to produce the Credit Note.

Credit Reason
This field is a free-format field which allows the user to key in a reason for the credit transaction.

Debtor ID/Name
These fields display the Debtor ID and Name associated with the Booking.

Charge Description
This field displays a description of the Charge.

Document Number
The Document Number field displays the Document/Invoice number (allocated by the Debtors module) and the date of the invoice transaction.

Invoiced Amount
The Invoiced Amount field displays the amount pertaining to this Fee line which has been invoiced through Bookings. The amount displays in dollars and cents.

Paid Amount
The Paid Amount field displays the amount pertaining to this Fee line which has already been paid off the invoice via Receipting. The amount displays in dollars and cents.

> Note: This amount is not taken into consideration when calculating the Allowable Credit. It is displayed merely for information purposes.

Credit Amount
The Credit Amount field displays the amount pertaining to this Fee line which has been credited to the invoice via a Credit Note from within Bookings. The amount displays in dollars and cents.

Allowable Credit
The Allowable Credit field calculates the amount pertaining to the Fee line which is available for crediting. This is calculated as follows:

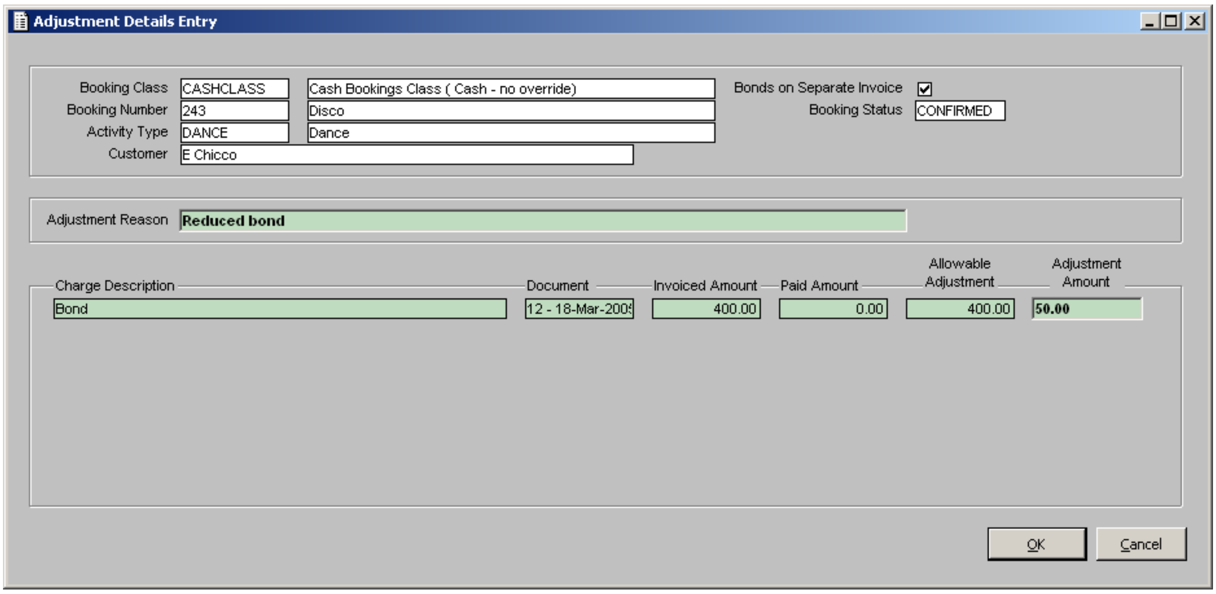
> INVOICED AMOUNT – CREDIT AMOUNT = ALLOWABLE CREDIT

Credit Amount
This field initially displays the Allowable Credit Amount. The user may modify this amount to reflect the amount being credited. This amount may not be greater than the Allowable Credit Amount.

Tip: If the user decides not to credit one of the Fee Lines at this point, instead of having to return to the Booking Fee Summary form to make a different selection, it is sufficient to enter a zero amount in the Credit Amount field for that particular Fee Line. No Credit Note transaction will then be processed for that line.

Adjustment Details Entry Form

This form is used to raise an Adjustment against a Fee. Adjustments can be raised against any Fee that has an 'Amount Owing'. The 'Allowable Adjustment' field displays the Amount Owing on the Fee. The 'Adjustment Amount' field also displays this value initially but may be modified to any value up to the balance of the Amount Owing.



Adjustment Details Entry Form

Booking Request Details

The header details include the following details pertaining to the Booking Request, e.g.

- Booking Class and Description
- Booking Number/Activity Name
- Activity Type
- Customer
- Bonds on Separate Invoice indicator
- Booking Status

Adjustment Reason
The Adjustment Reason field requires that a reason for the Adjustment be entered. It is a mandatory field.

Charge Description

The Charge Description field displays a description of the selected Charge.

Document
The Document field displays the Invoice Number and the Date on which the Invoice was raised.

Invoiced Amount
This field displays the amount that was invoiced.

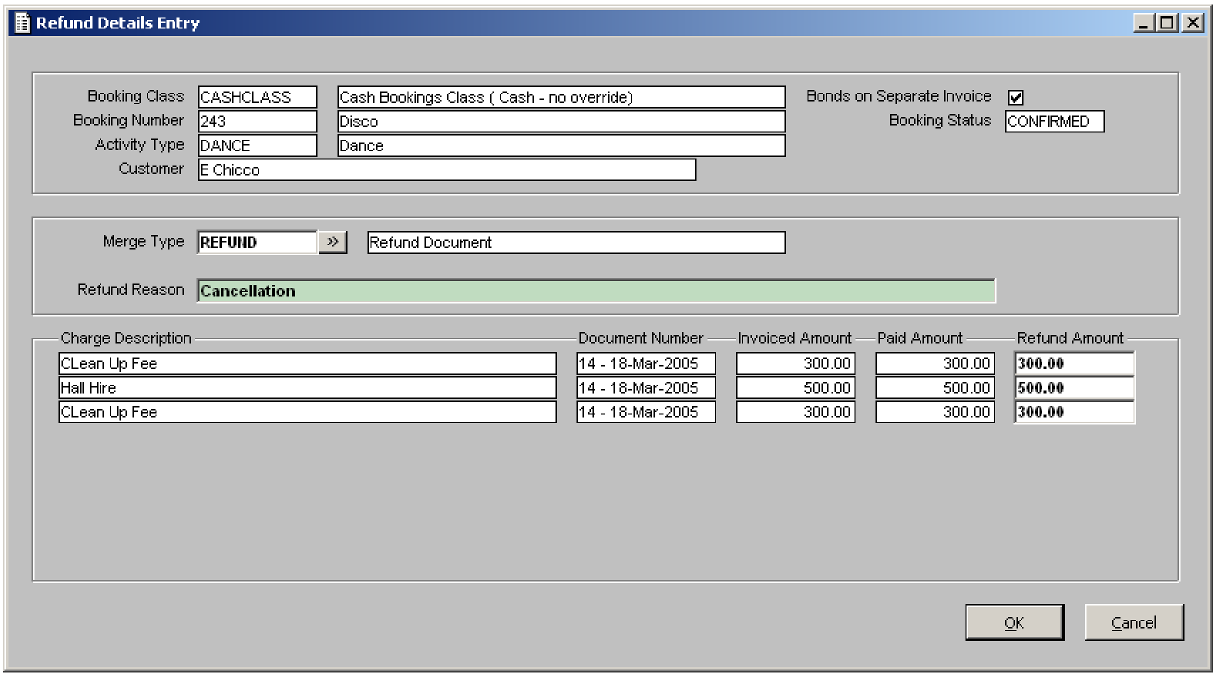
Paid Amount
This field displays the amount, if any, that has been receipted.

Allowable Adjustment
The 'Allowable Adjustment' field displays the Amount Owing on the Fee.

Adjustment Amount
The Adjustment Amount' field initially displays the Amount Owing, but may be modified to any value up to the balance of the Amount Owing, e.g. If an Adjustment Amount of $200 is entered, the Amount Owing will be reduced by $200.

Refund Details Entry Form

This form is used for processing Refunds for the Bookings Cash Invoicing function. It allows the user to enter a Refund Amount up to the value that has been paid on a Fee. It prompts for the Merge Type to use and the 'Refund Reason' which is mandatory.



Refund Details Entry Form

Booking Request Details
The header details include the following details pertaining to the Booking Request, e.g.

- Booking Class and Description
- Booking Number/Activity Name
- Activity Type
- Customer
- Bonds on Separate Invoice indicator

- Booking Status

Merge Type

The Merge Type field requires that a Merge Type be keyed in or selected from the Pop Up. The Merge Type is used to produce the Refund document (similar to a Credit Note). Merge Types created for the Debtors Credit Note option may also be used to produce the Refund document. The first Merge Type listed will default into this field when the form is accessed, but it may be changed by the user.

Refund Reason

Entry of a Refund Reason is mandatory when processing a Refund transaction. This field accepts up to 75 alphanumeric characters.

Charge Description

This field displays a description of the selected Charge, e.g. Hall Hire.

Document Number

The Document Number field displays the Document/Invoice number (allocated by the Debtors module) and the date of the invoice transaction.

Invoiced Amount

The Invoiced Amount field displays the amount pertaining to this Fee line which has been invoiced through Bookings. The amount displays in dollars and cents.

Paid Amount

The Paid Amount field displays the amount pertaining to this Fee line which has already been paid off the invoice via Receipting. The amount displays in dollars and cents.

Refund Amount

The Refund Amount field displays the original amount paid but allows the user to change the amount to be refunded. This amount cannot be greater than the original Amount Paid.

Copy Options Form

The Copy Options form displays when the Copy Button is selected on the Booking Entry/Maintenance form.
It allows the user to specify which Role Types, Options and Note Types to copy from the original Booking Request to a new one.

When the ‘Continue’ button is selected after making your selections, a new Booking Request is created and displayed on the screen with a new Booking Number and the following settings:

- Booking Status: Copied from the original Booking (if no default Booking Status has been defined)
- Responsible Officer: Set to the current user

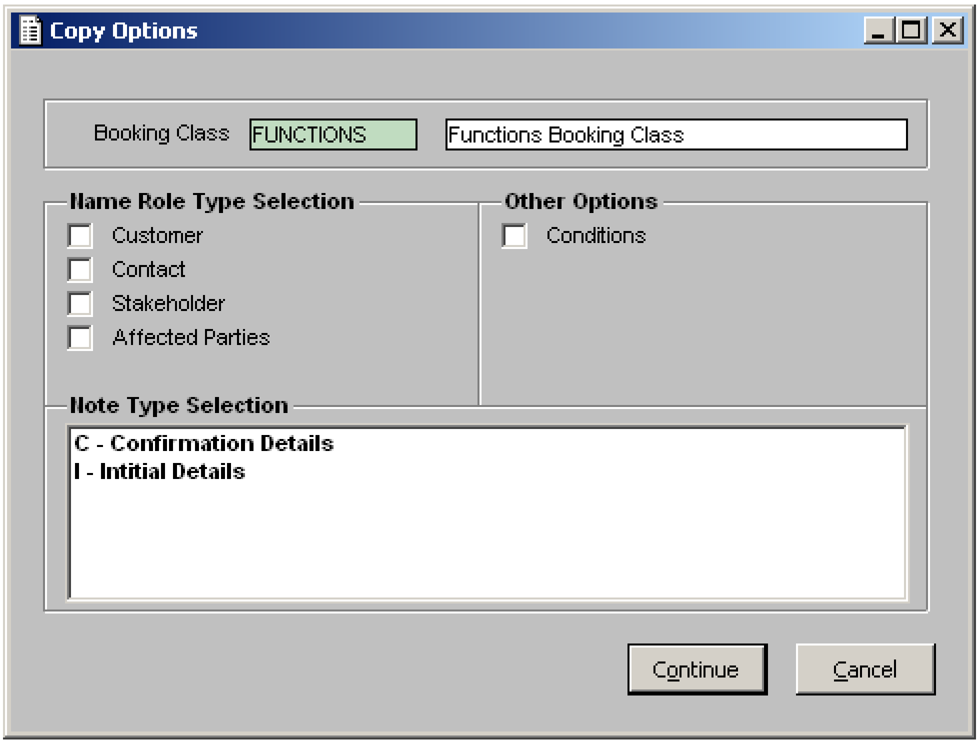
The following fields are copied from the original Booking:

- Activity Type
- Activity Sub-Type
- Activity Name
- Activity Details
- Customer Type
- Number of Attendees
- Significant Flag

If any Role Types were selected, then these should have been copied from the original Booking. The Names Summary Box will be populated with these details. The ‘Conditions’ option flag will be checked ON if any Booking Conditions have been copied.

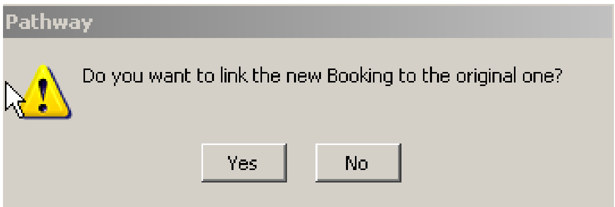
If Note Types were selected, then all Notes of the selected Note Types should have been copied from the original Booking. The ‘Notes’ option flag will be checked ON if any Notes exist.

When the new Booking (the copy) is saved by clicking the ‘OK’ button, the ‘Booking Entry’ screen will change to ‘Booking Maintenance’. Navigation buttons will now display in the bottom left-hand corner to allow the user to navigate between the new and the original Booking.



Copy Options form

Answering ‘Yes’ to the following message when saving the new Booking will link the copied Booking to the original one:



See further details on Linked Bookings.

Booking Class

These fields display the Booking Class details. This would be the same as the original Booking Request.

Name Role Type Selection

These indicators allow the user to select which Role Types are to be copied across to the new Booking Request. None, one or all may be selected. The available Role Types are:

- Customer
- Contact
- Stakeholder

- Affected Party

Other Options

These indicators allow the user to select which Options are to be copied across to the new Booking Request. None, one or all may be selected. The available Options are:

- Conditions

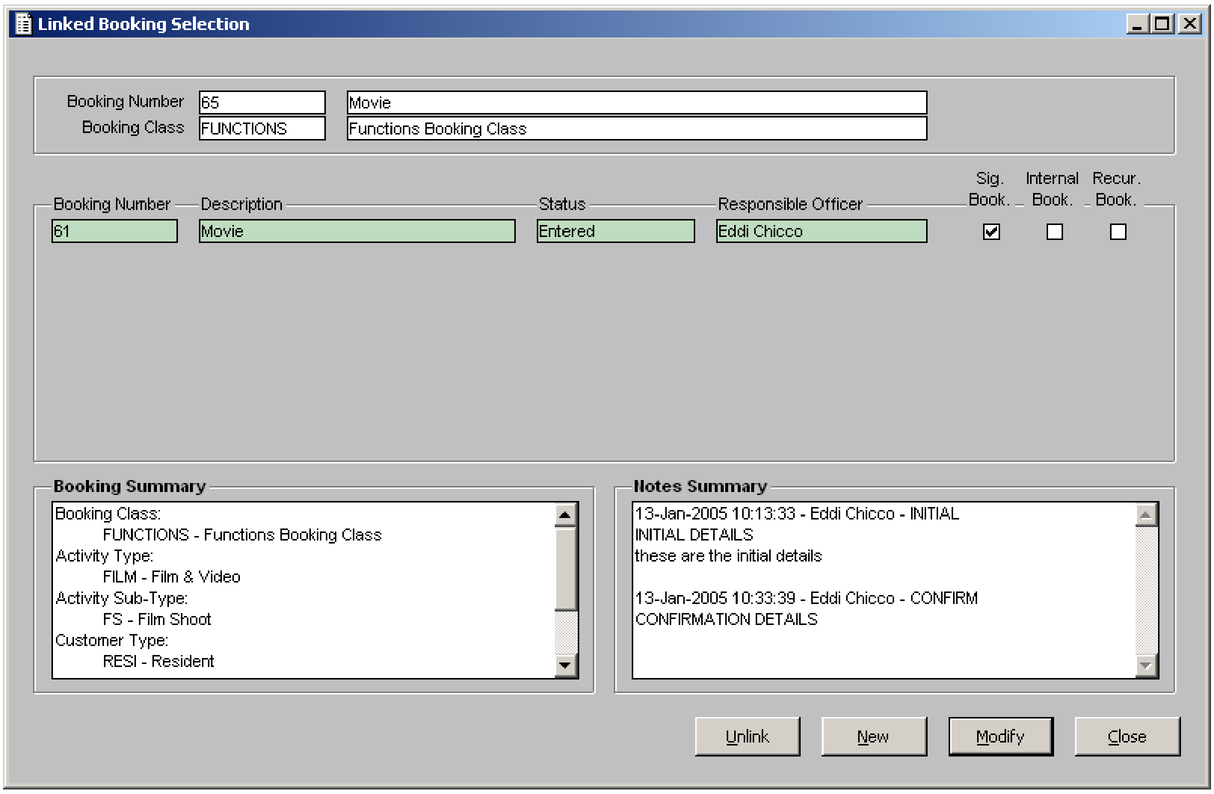
Note Type Selection

This box displays all current, active, user authorised Note Types which have been set up for the Booking Class. The user may select none, one or many to copy to the new booking Request. If Notes exist of any of the selected Note Type, they will be copied to the new Booking Request.

Linked Booking Selection Form

The Linked Booking Selection form displays when the Linked Requests Options indicator is clicked on the Booking Entry/Maintenance form. It displays all Booking Requests that are linked to the current Booking Request.

If linked Bookings exist on a Booking Request, the Linked Requests flag will be checked ON. Double – clicking this indicator will display the Linked Booking Selection form where any Linked Bookings will be listed. The user is able to Unlink or Modify an existing Linked Booking or create a New Link from this form.



Linked Booking Selection form

Booking Number

These fields display details of the Booking Request (Number and Description) to which the listed Booking Requests are linked.

Booking Class

These fields display the Booking Class to which the current Booking belongs.

Booking Details
These fields list details of the linked Booking Requests. The following fields display:

- Booking Number
- Description
- Status
- Responsible Officer
- Significant Booking
- Internal Booking
- Recurring Booking

Requests form the same Booking Class only may be linked.

Booking Summary
The Booking Summary box displays further details of the linked Request which has focus. The details below provide an example of the contents of this Summary box:

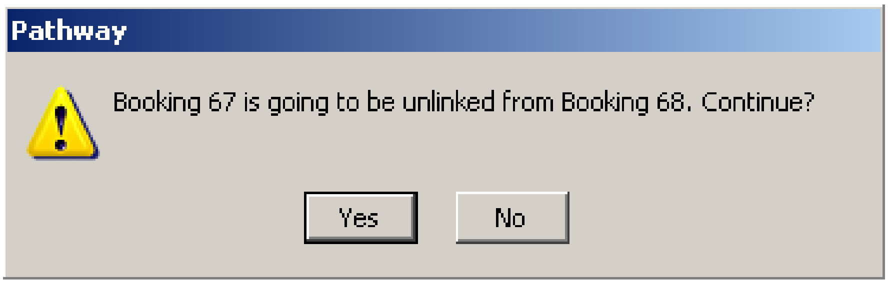
Booking Class:
FUNCTIONS - Functions Booking Class
Activity Type:
EXHIBITION - Exhibition/Display
Activity Sub-Type:
ART - Art Display
Customer Type:
EDUC - Educational
Customer:
Miss Eddi Chicco
Location:
Facility: FCC - Fullarton Community Centre
Street/Suburb Locations:
First Avenue ADELAIDE

Notes Summary
The Notes Summary box displays any Notes details pertaining to the linked Request which has focus. The details below provide an example of the contents of this Summary box:

23-Nov-2004 13:59:11 - Eddi Chicco - CONFIRM
CONFIRMATION DETAILS
This booking will be confirmed when payment is received.

23-Nov-2004 15:06:36 - Eddi Chicco - CONFIRM
CONFIRMATION DETAILS
Payment has been received.

Unlink Button
Selecting the Unlink Button while focus is on a linked Request will unlink the linked Request from the original Request. The following confirmation message will display:



Clicking 'Yes' will unlink the Booking Request and remove it from the Selection form. Selecting 'No' will do nothing.

Bookings Receipting

There are two methods for Receipting within the Bookings Management Module. Debtors Receipting and Cash Receipting.

For Booking Classes which are set up to use Pathway Debtors Accounting, Receipting is required to be performed using the DR Application Code and the payment is processed through Debtors.

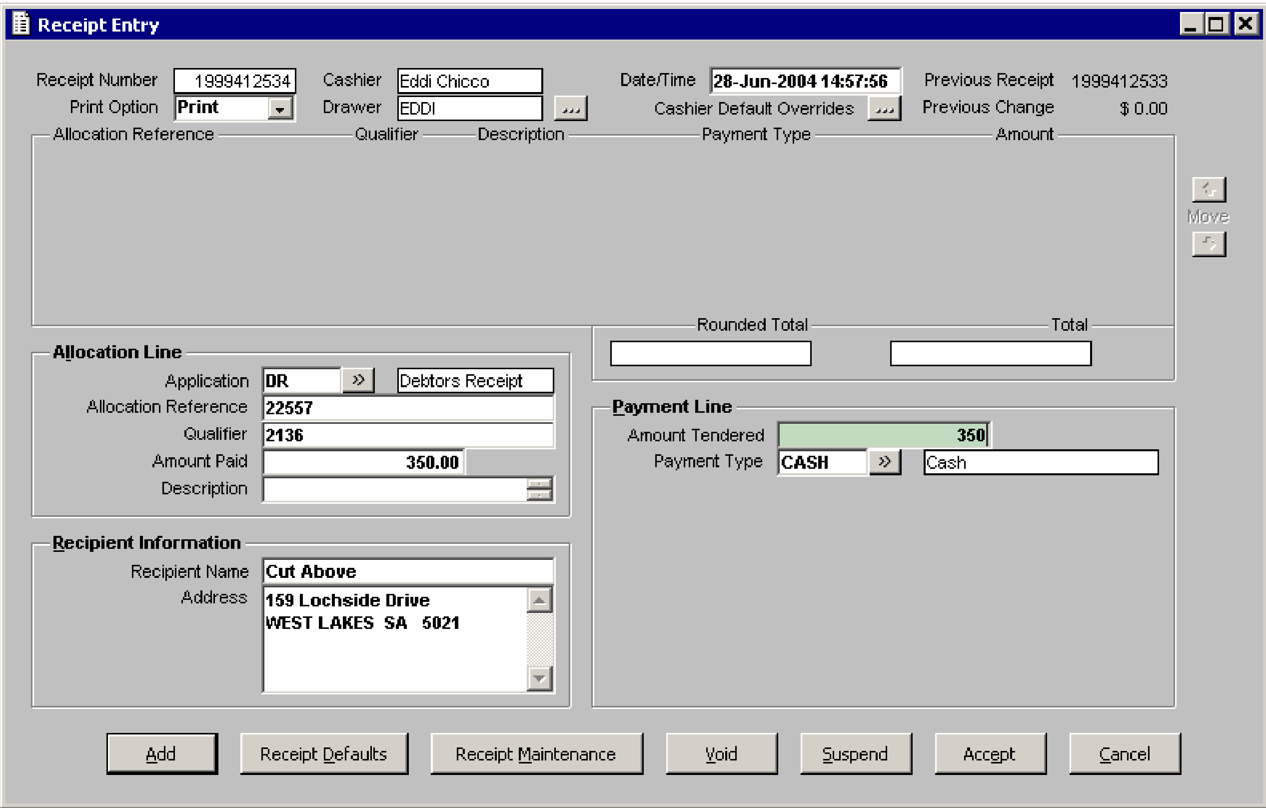
For Booking Classes which are set to use Cash Invoicing, invoices may be paid via Receipting using an Application Code of BK. Using this method will not utilise Debtors at all. The process is controlled entirely within the Bookings Management module.

Receipting Methods

Pathway Debtors Receipting

Payment of some Bookings Invoices is performed via Debtors Receipting. The Cashier may receipt in the following way after an Invoice has been generated through the Bookings Module:

- Receipting Application: DR
- Allocation Reference: Debtor Number
- Qualifier: Invoice Number



Receipt Entry form showing entry of a Debtor Receipt for Bookings

This process validates the Debtor Number and the Booking Number and if either is invalid, an error is displayed to the user. If both numbers are valid, then the Receipting process will accept the money and allocate it against Invoice Transactions generated by the Booking.

Receipting in Cash Mode

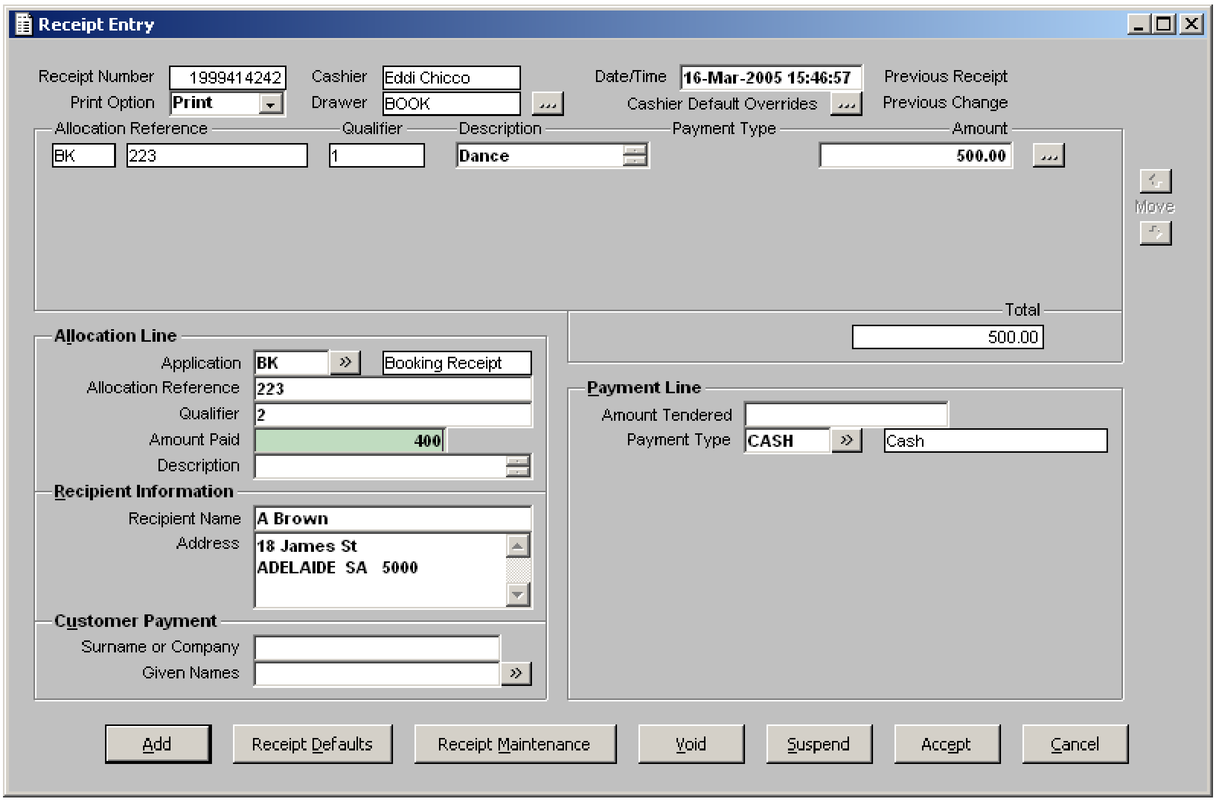
In Cash mode, a Booking Invoice is paid through the Bookings Module via the BK Application code in Receipting (instead of through Debtors).

Receipts will use the following:
- Receipting Application – BK
- Reference – Booking Number (mandatory)
- Qualifier – Invoice Number (optional)

If no Qualifier is specified then the ‘Amount Owing’ will be for the entire Booking and any payments will be allocated against any eligible outstanding Fees in ascending date order. If you do specify a Qualifier, then the ‘Amount Owing’ will be for that Invoice only, and any payments will be allocated against any eligible outstanding Fees in ascending date order for that Invoice. If you pay more than the amount owing, then it is possible to generate ‘Overpayments’ on the Booking.

If money remains after the invoice has been paid off, then the money will be processed to any additional invoices that are outstanding. If there is still an amount remaining then the amount will be moved to “Overpayments”.

Receipt Reversals and Transfers are conducted via Receipting with The Bookings Management module managing the transaction.



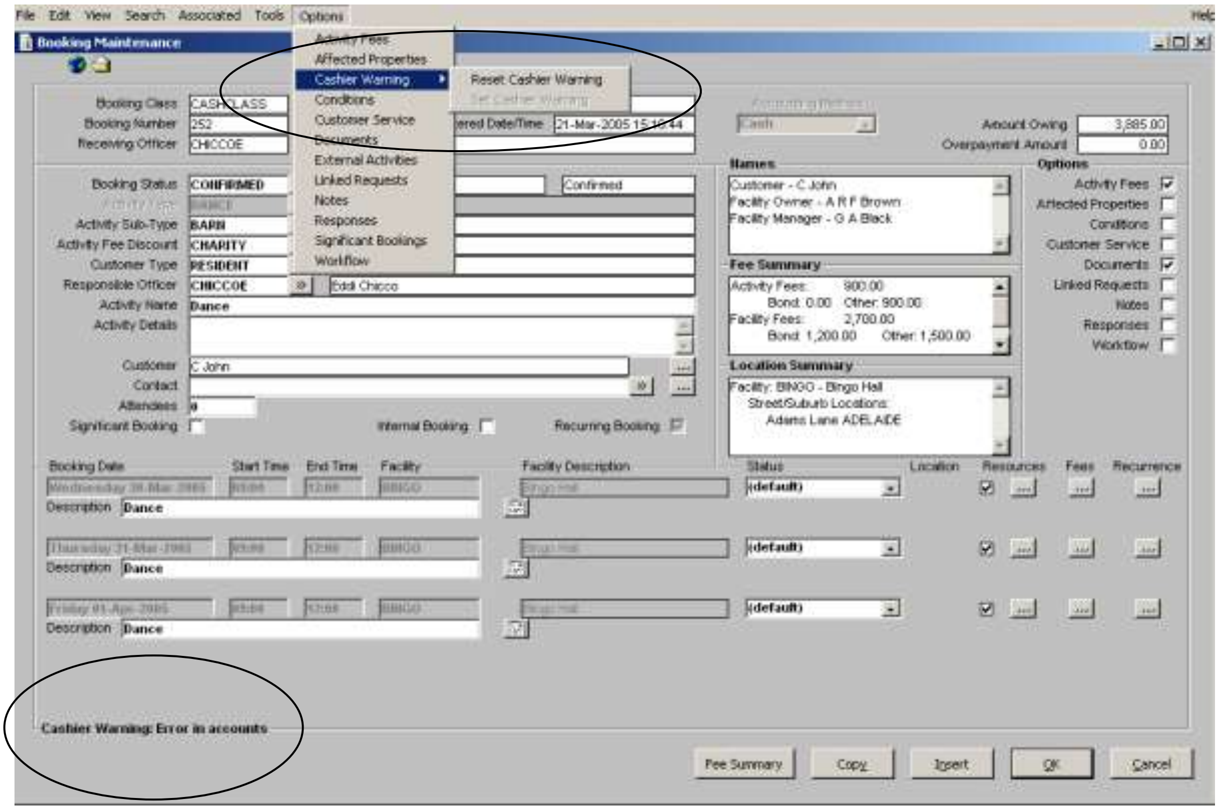
Receipt Entry showing entry of a Cash Receipt for Bookings

Cashier Warning Codes

The Cashier Warning Code option has been made available only where the Booking is being processed through Cash mode.

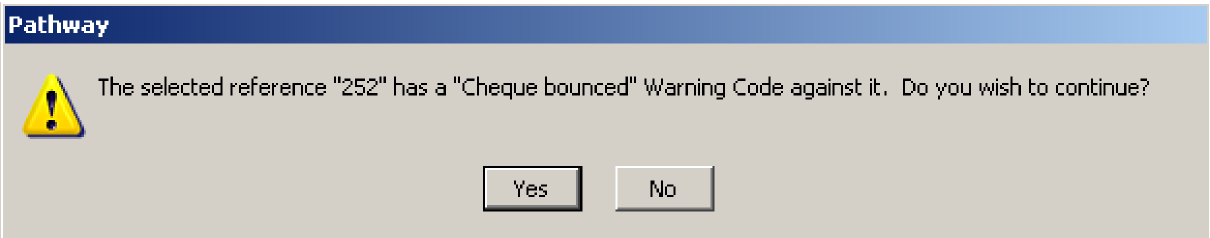
The following options have been made available via the Options>>Cashier Warning pull down menu:
- Reset Cashier Warning
- Set Cashier Warning

When the user takes the Set Cashier Warning option, they will be presented with the Cashier Warning Pop Up screen listing the Cashier Warnings that have been defined for the Booking Class. They are then able to select a Warning Code and that will be recorded for the Booking Request. Note that if a Cashier Warning has already been set, then the Set option will not be available.



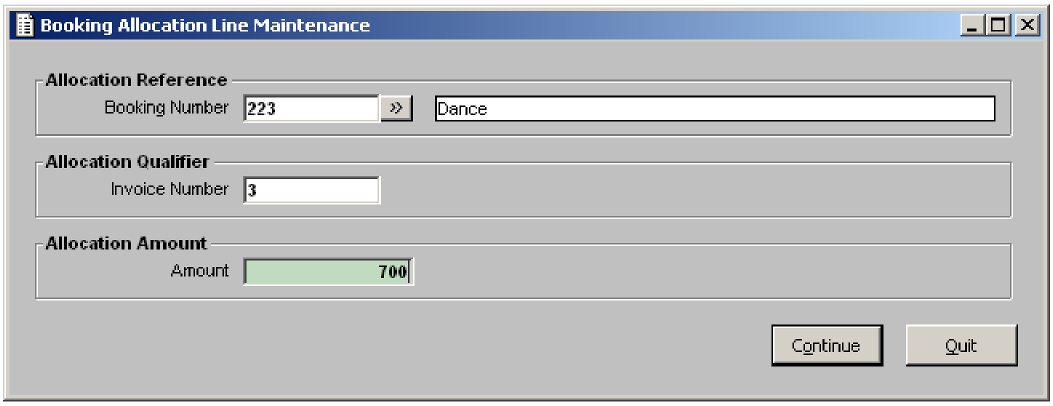
Booking Maintenance form showing Cashier Warning details

If a Cashier Warning is in place for a Booking Request, any receipting performed for the Booking will display a message similar to the following to either simply warn the Cashier or to prevent processing of the receipt.



Booking Allocation Line Maintenance Form

The Booking Allocation Line Maintenance Form allows the user to enter/select details to create a Receipt Allocation Line for a Bookings Cash Receipt.



Booking Allocation Line Maintenance Form

Allocation Reference – Booking Number

This field requires that the user key in, or select from the Pop Up, a Booking Number to allocate to the Receipt. This field is mandatory. If a number is keyed in, the user is not presented with the Booking Class Pop Up, as Booking Numbers are unique across classes. If the Pop Up is used, the user is required to select a Booking Class over which to search.

Allocation Qualifier – Invoice Number

The Receipt Qualifier field requires an Invoice Number to be keyed in. This field is optional.

If no Qualifier is specified then the 'Amount Owing' will be for the entire Booking and any payments will be allocated against any eligible outstanding Fees in ascending date order. If you do specify a Qualifier, then the 'Amount Owing' will be for that Invoice only, and any payments will be allocated against any eligible outstanding Fees in ascending date order for that Invoice. If you pay more than the amount owing, then it is possible to generate 'Overpayments' on the Booking.

Allocation Amount

This field requires an amount to be keyed in. If an Amount is not specified, the appropriate Amount Owing will be calculated and returned to Receipt Entry.

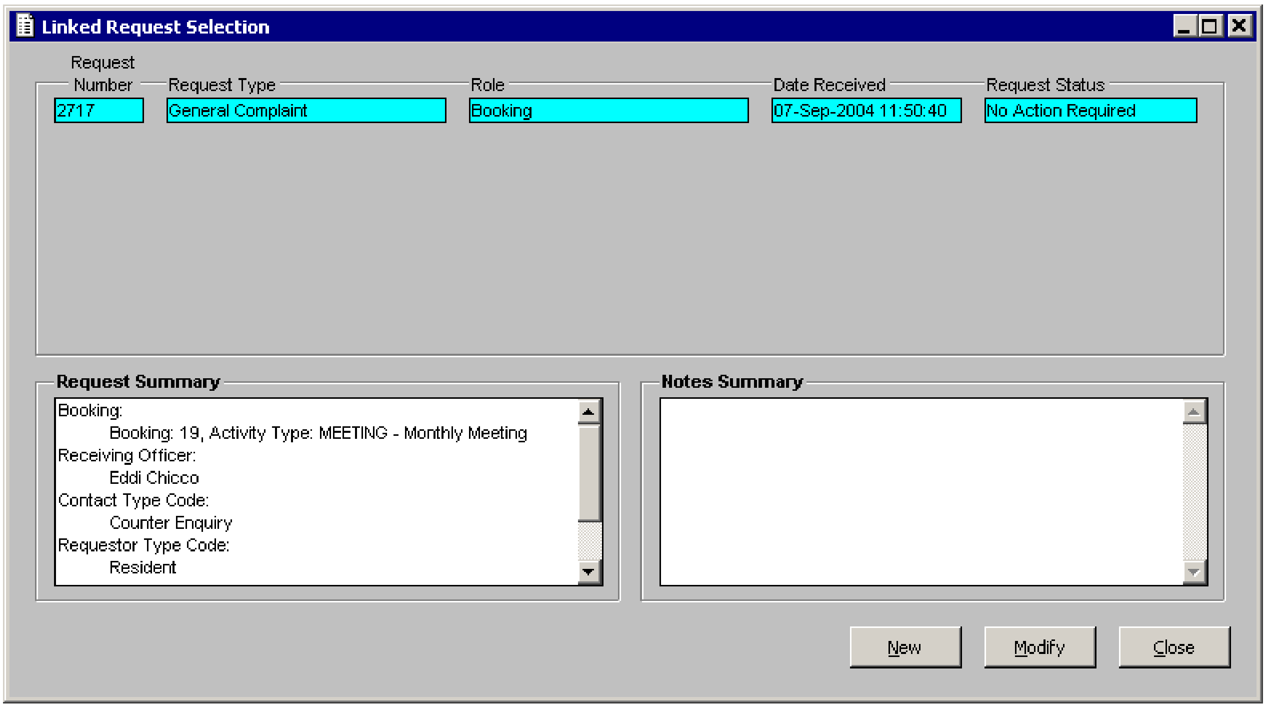
Linking a Customer Service Request to a Booking

Booking Requests may be linked to Customer Service Requests. An interface has been provided from the Bookings Management Module to the Customer Service Module to allow Customer Service Requests to be linked to Booking Requests (and vice versa).

In order for Customer Request Types to be available for a Booking Request, the user must have authority to ‘Modify Module Links’ within Customer Service parameters. This will then allow Customer Requests to be linked to Booking Requests.

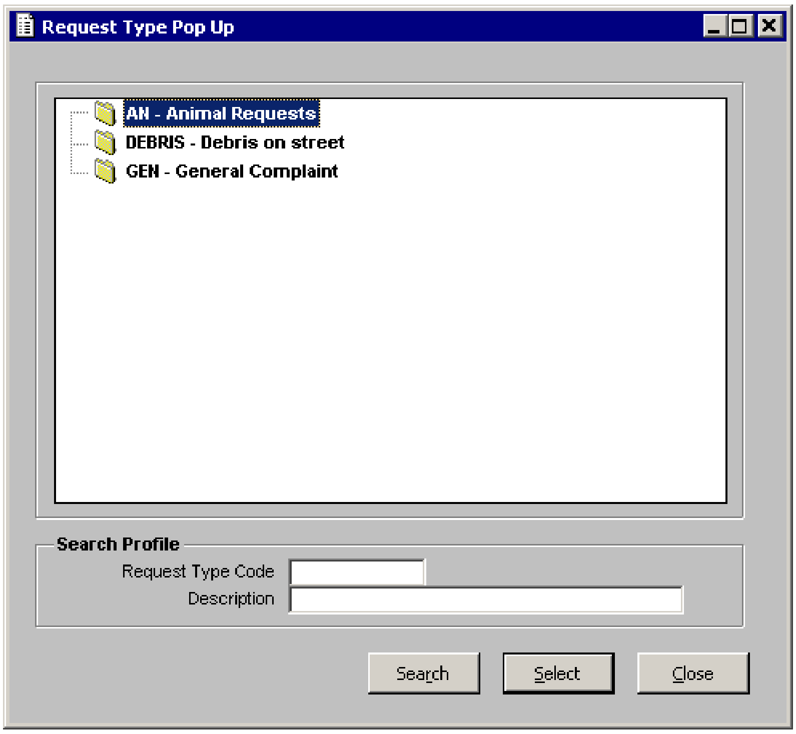
The linking of Customer Service Requests to a Booking Request is performed in the Booking Entry/Maintenance form. There are two avenues which may be followed; selecting the Customer Service checkbox listed in the Options on the right hand side of the form, or, alternatively, selecting the Customer Service occurrence in the Options dropdown menu on the top menu bar. Both methods will display the Linked Request Selection form where Customer Service Requests may be added, deleted or maintained.

The Linked Request Selection form displays when the user clicks on the Customer Service option checkbox or the Customer Service option on the dropdown Options menu. This form allows new Customer Requests to be linked to a Booking Request, and existing ones to be modified or deleted.



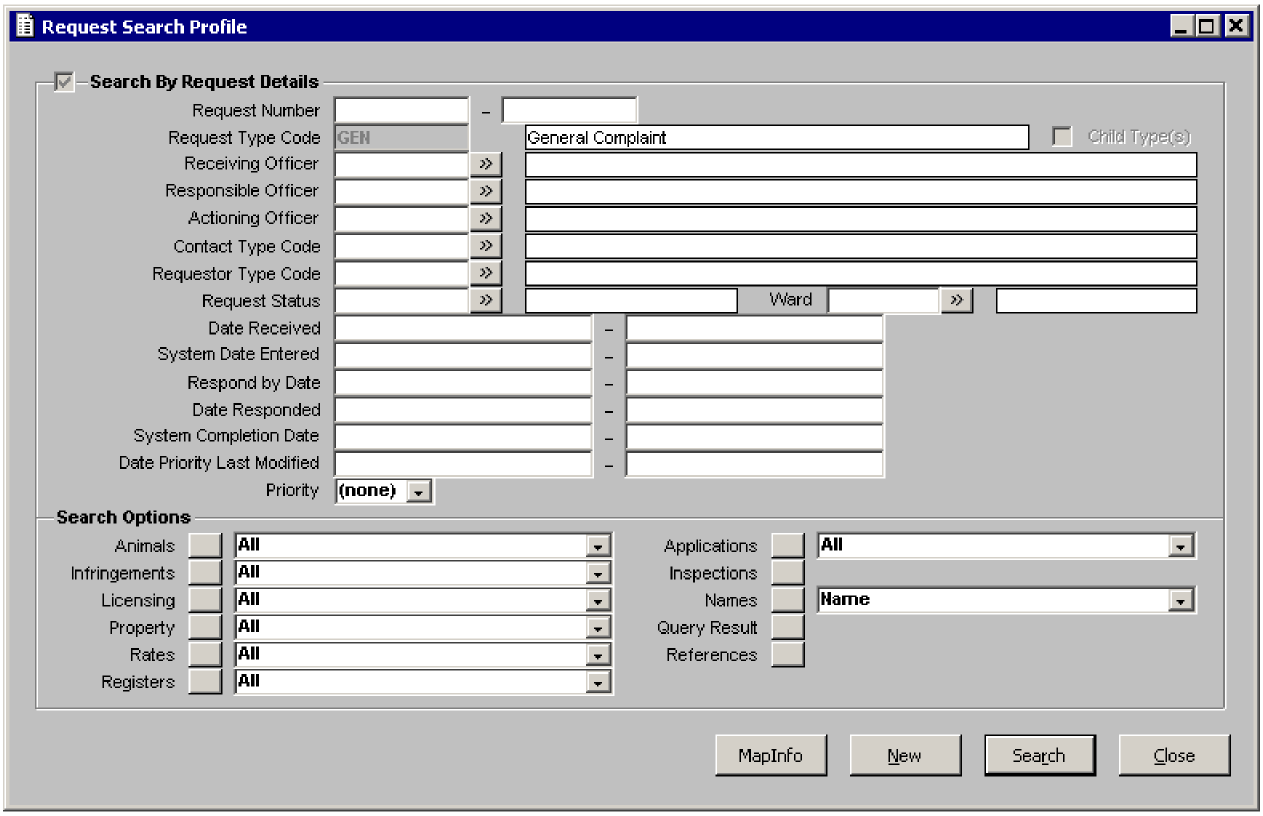
Linked Request Selection Form

To link a new Customer Request to a Booking Request, select the New button. The Request Type Pop Up form will display if more than one Request Type has been assigned to the Bookings Management module. Otherwise, the Request Search Profile will display.



Request Type Pop Up form

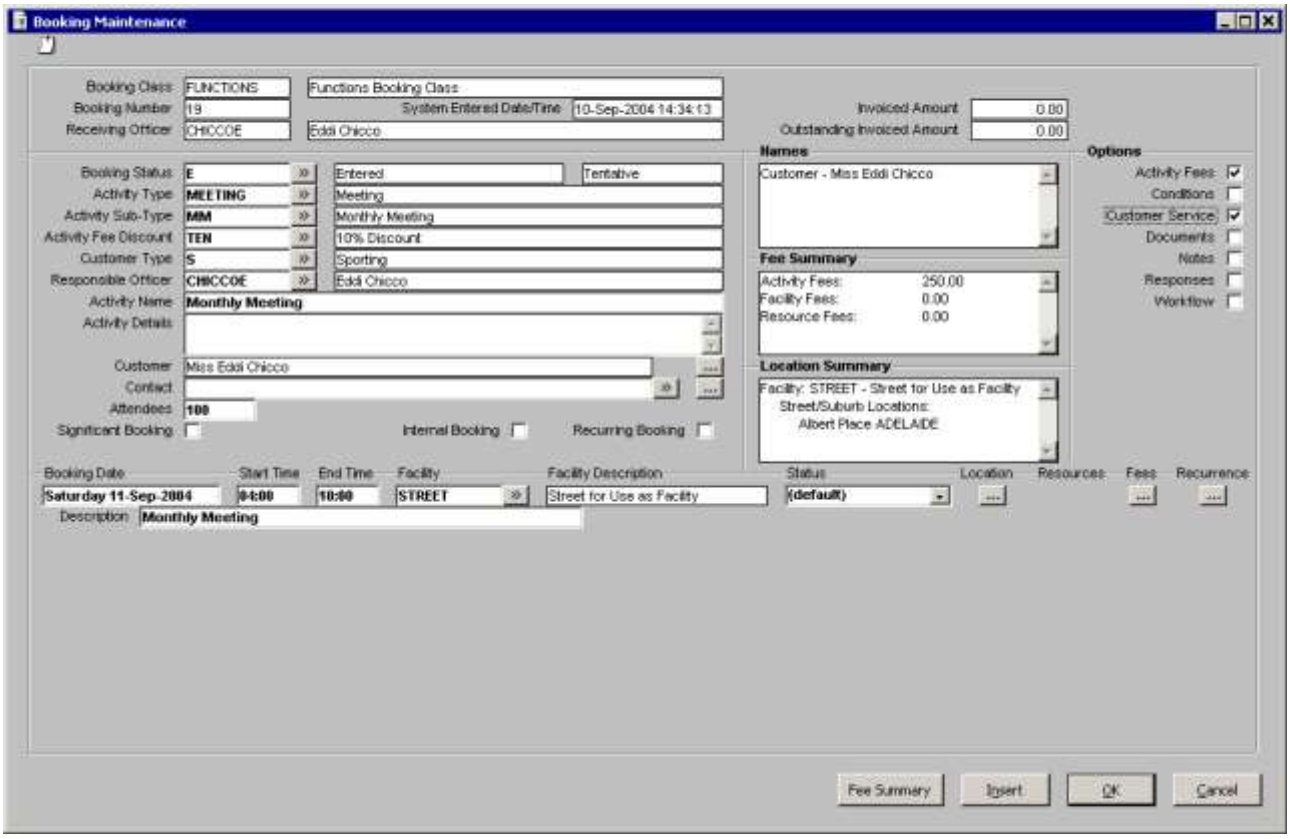
Once a Request Type has been selected, the Request Search Profile form will display to allow selection of an existing Request Type, or the creation of a new one.



Request Search Profile form

Click the Search button to search for an existing Customer Request pertaining to the specified Request Type, or click the New button to create a new Request.

When linked Customer Requests exist on a Booking Request, then the Customer Service checkbox will be flagged as ON (as shown below).



Booking Maintenance Form showing Customer Service Option checkbox flagged ON

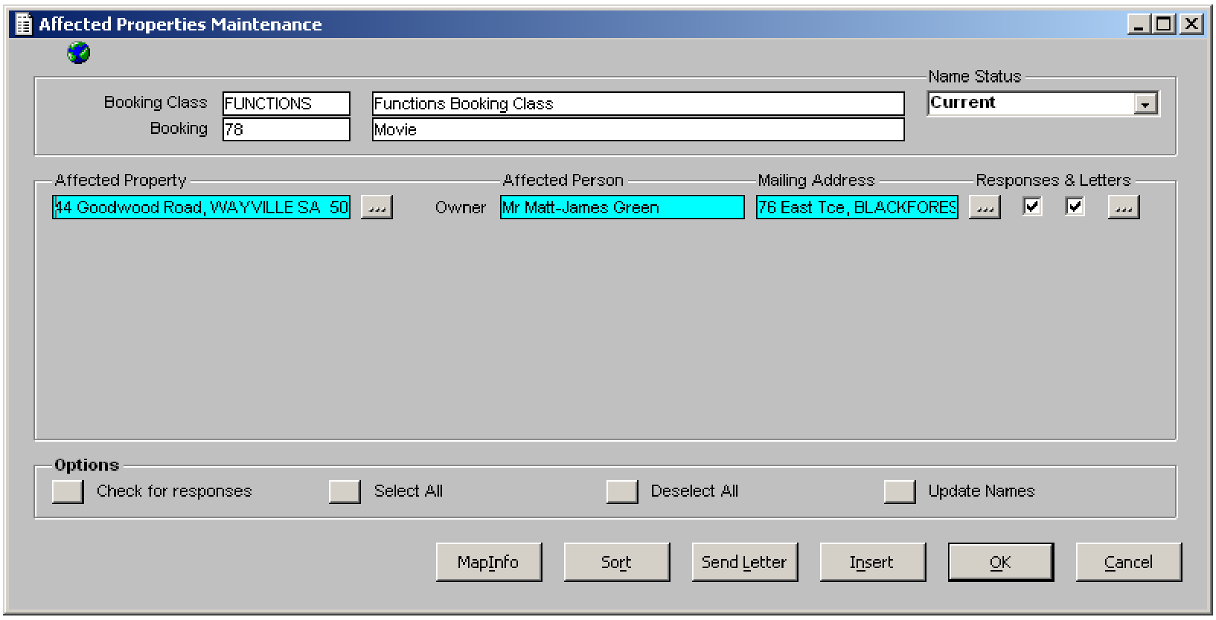
Linking Affected Properties to a Booking

Bookings Management provides the ability to record any properties affected by a Booking. Users are also able to send letters to the Owners or Occupiers of the Affected Properties.

In addition, GIS functionality is available for Affected Properties.

Affected Properties Maintenance Form

The Affected Properties form is designed to allow for the selection of Properties that may be affected by the Booking and the ability to create Letters and receive Responses. The GIS button provides the ability to interface to a GIS product to display the location of the property.



Affected Properties Maintenance Form

Booking Class/Booking
These fields provide details of the current Booking, e.g. Class/Description, Booking Number and Booking Description. These fields are display only and cannot be maintained.

Name Status
The Name Status field is a dropdown field providing the following choices:

- Current
- Historic
- Current & Historic

This field defaults to Current upon entry into the Affected Properties Maintenance Form. The Dropdown can be changed to show only Historic or a combination of Current and Historic Names.

Affected Property
The Affected Property field details the actual Property Affected by this Booking. Multiple Properties can be selected by using the insert button. Clicking the Detail button to the right of the Affected Property will detail out to the Property Summary Form.

Affected Person/Mailing Address

These fields detail the name and Mailing Address of the Affected Person associated with the Affected Property. The detail button to the right of this form allows the User to detail out to the Name Maintenance form for the person.

Responses
This field if checked will show that Responses have been received regarding this Booking. Responses may be added by detailing out to the Letter Summary and adding the particular Response.

Letter Sent
This field, if checked, will show that a Letter has been sent to this particular Affected Property. The detail button to the right of the field allows the User to detail out to the particular Letter Request sent. The User may then add a Response, view the Letter, or re-generate a Letter.

Check for Responses Button
Selection of the Responses Button will place a check tick in the Responses box against those letters that have received any responses.

Select All Button
Selecting this button will select all the Affected Properties and Affected Person. However, the Other Interested Parties need to be manually selected.

Deselect All
Selecting the Deselect All button will deselect all the Affected Properties and Affected Person. However, the Other Interested Parties need to be manually deselected.

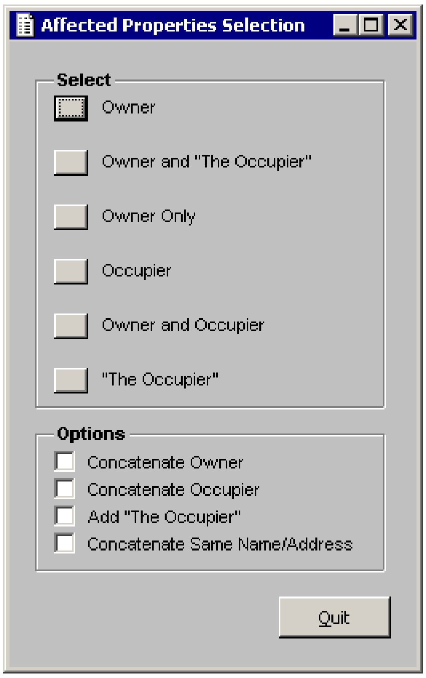
Update Names
The Update Names Button, when selected, will update the Property Owner Name information for Affected Properties. If the Property Owner has changed then the new Owner will be added as an Affected Person and the old Owner will be made Historic. Any letters that have been created against the old Owner are still retained and able to be reviewed by changing the Name Status to Historic and selecting the Letters detail button.

Sort Button
The Sort Button may be selected to “Sort” Affected People by Property order or Person order.

Affected Properties Selection form

The Affected Properties Selection Form consists of a series of button to facilitate the selection of a particular Affected Person associated with a Property. This form is displayed when the Insert Button is selected from the Affected Properties Maintenance Form.

A Button may be selected in conjunction with one or more Options. The results obtained will depend on which Button and Options are combined in the search.



Affected Properties Selection Form

The Select Buttons may be combined with one or more Options to select Properties and Owners/Occupiers in a variety of ways. The following details describe the results of combining Buttons with the various Options:

<u>Owner – No Options</u>

Selecting the ‘Owner’ Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows the Owner of the Property to be selected as the Affected Person. **No** occurrence of ‘The Occupier’ will be included in the selection process.

To determine whether the Owner lives at the Affected Property, matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.

If the above properties were selected as Affected Properties using the ‘Owner’ option only they would appear as follows on the Affected Properties Maintenance form

<u>Affected Property</u>		<u>Name</u>	<u>Mailing Address</u>
13 Smith St, Geac	Owner	Martin Smith	13 Smith St, Geac
14 Smith St, Geac	Owner	William Bird	96 Young St, Goodwood
17 Smith St, Geac	Owner	Robyn White	6/129 Smith St, Geac

<u>Owner – Add “The Occupier”</u>

Selecting the ‘Owner’ Button with the Add “The Occupier” Option performs the selection of the Affected Properties in the following way.

Selecting these buttons allows the Owner of the Property to be selected as the Affected Person. Occurrences of ‘The Occupier’ will be included in the selection process. Where the Owner’s Mailing

Address does **NOT** match the Affected Property Address an occurrence of “The Occupier” will be included for the Affected Property selected.

To determine whether the Owner lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.

If the above properties were selected as Affected Properties using the ‘Owner’ and the Add “The Occupier” Option they would appear as follows on the Affected Properties Maintenance form

Affected Property		Name	Mailing Address
13 Smith St, Geac	Owner	Martin Smith	13 Smith St, Geac
14 Smith St, Geac	Owner	William Bird	96 Young St, Goodwood
	Occupier	“The Occupier”	
17 Smith St, Geac	Owner	Robyn White	6/129 Smith St, Geac

Owner and “The Occupier” – No Options

Selecting the ‘Owner and “The Occupier”’ Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows the Owner of the Property to be selected as the Affected Person. **No** occurrence of ‘The Occupier’ will be included in the selection process.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac

If the above properties were selected as Affected Properties using the ‘Owner and “The Occupier” Option only, they would appear as follows on the Affected Properties Maintenance form

Affected Property		Name	Mailing Address
13 Smith St, Geac	Owner	Martin Smith	13 Smith St, Geac
14 Smith St, Geac	Owner	William Bird	96 Young St, Goodwood
17 Smith St, Geac	Owner	Robyn White	6/129 Smith St, Geac

Owner and “The Occupier” – Add “The Occupier”

Selecting the ‘Owner and “The Occupier”’ Button with the Add “The Occupier” Option performs the selection of the Affected Properties in the following way.

Selecting this button allows the Owner of the Property to be selected as the Affected Person. Occurrences of ‘The Occupier’ will be included in the selection process. “The Occupier” will be included for **ALL** Affected Properties selected.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac

If the above properties were selected as Affected Properties using the 'Owner and "The Occupier"' and the Add "The Occupier" Option, they would appear as follows on the Affected Properties Maintenance form

Affected Property		Name	Mailing Address
13 Smith St, Geac	Owner	Martin Smith	13 Smith St, Geac
	Occupier	"The Occupier"	
14 Smith St, Geac	Owner	William Bird	96 Young St, Goodwood
	Occupier	"The Occupier"	
17 Smith St, Geac	Owner	Robyn White	6/129 Smith St, Geac
	Occupier	"The Occupier"	
19 Smith St, Geac	Occupier	"The Occupier"	

Owner Only – No Options

Selecting the 'Owner Only' Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows the Owner of the Property to be selected as the Affected Person. **No** occurrence of 'The Occupier' will be included in the selection process. Where the Affected Property that has been selected does not have an Owner record an occurrence of "The Owner" will be generated for the Affected Property.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac

If the above properties were selected as Affected Properties using the 'Owner Only' option only they would appear as follows on the Affected Properties Maintenance form

Affected Property		Name	Mailing Address
13 Smith St, Geac	Owner	Martin Smith	13 Smith St, Geac
14 Smith St, Geac	Owner	William Bird	96 Young St, Goodwood
17 Smith St, Geac	Owner	Robyn White	6/129 Smith St, Geac
19 Smith St, Geac	Owner	"The Owner"	

Owner Only – Add "The Occupier"

Selecting the 'Owner Only' Button with the Add "The Occupier" Option performs the selection of the Affected Properties as the option above where the Add "The Occupier" Option was not selected.

Selecting these buttons allows the Owner of the Property to be selected as the Affected Person. No occurrences of 'The Occupier' will be included in the selection process.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.

- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac

If the above properties were selected as Affected Properties using the 'Owner Only' and the Add "The Occupier" Option they would appear as follows on the Affected Properties Maintenance form

Affected Property		Name	Mailing Address
13 Smith St, Geac	Owner	Martin Smith	13 Smith St, Geac
14 Smith St, Geac	Owner	William Bird	96 Young St, Goodwood
17 Smith St, Geac	Owner	Robyn White	6/129 Smith St, Geac
19 Smith St, Geac	Owner	"The Owner"	

Occupier – No Options

Selecting the 'Occupier' Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows the Occupier of the Property to be selected as the Affected Person. **No** occurrence of 'The Occupier' will be included in the selection process. Where the Affected Property that has been selected does not have an Occupier record an occurrence of "The Occupier" is **NOT** generated for the Affected Property.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac and Tom's Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the 'Occupier' Option only they would appear as follows on the Affected Properties Maintenance form:

Affected Property		Name	Mailing Address
13 Smith St, Geac	Occupier	Martin Smith	13 Smith St, Geac
17 Smith St, Geac	Occupier	Greg Wood	
19 Smith St, Geac	Occupier	Tom Herd	19 Smith St, Geac

Occupier – Add "The Occupier"

Selecting the 'Owner' Button with the Add "The Occupier" Option performs the selection of the Affected Properties in the following way.

Selecting these buttons allows the Occupier of the Property to be selected as the Affected Person. Occurrences of 'The Occupier' will be included on all Properties that have been included in selection process whether or not there is an Occupier Role record already on the Property.

To determine whether the Occupier lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.

- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac and Tom's Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the 'Occupier' and the Add "The Occupier" Option they would appear as follows on the Affected Properties Maintenance form.

Affected Property		Name	Mailing Address
13 Smith St, Geac	Occupier	Martin Smith	13 Smith St, Geac
	Occupier	"The Occupier"	
14 Smith St, Geac	Occupier	"The Occupier"	
17 Smith St, Geac	Occupier	Greg Wood	
	Occupier	"The Occupier"	
19 Smith St, Geac	Occupier	Tom Herd	19 Smith St, Geac
	Occupier	"The Occupier"	

Owner and Occupier – No Options

Selecting the 'Owner and Occupier' Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows the Owner and or Occupier of the Property to be selected as the Affected Person. **No** occurrence of 'The Occupier' will be included in the selection process. Where the Affected Property that has been selected does not have an Owner or an Occupier record the Property will not be included in the selected Affected Properties.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac and Tom's Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the 'Owner and Occupier' option only they would appear as follows on the Affected Properties Maintenance form.

Affected Property		Name	Mailing Address
13 Smith St, Geac	Owner	Martin Smith	13 Smith St, Geac
	Occupier	Martin Smith	13 Smith St, Geac
14 Smith St, Geac	Owner	William Bird	96 Young St, Goodwood
17 Smith St, Geac	Owner	Robyn White	Unit 6, 129 Smith St, Geac
	Occupier	Greg Wood	
19 Smith St, Geac	Occupier	Tom Herd	19 Smith St, Geac

Owner and Occupier – Add "The Occupier"

Selecting the 'Owner and Occupier' Button with the Add "The Occupier" Option performs the selection of the Affected Properties in the following way.

Selecting these buttons allows the Owner and or the Occupier of the Property to be selected as the Affected Person. Occurrences of 'The Occupier' will be included in the selection process for each Affected Property that has been selected.

To determine whether the Owner/Occupier lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

Example
□□Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
□□William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
□□Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
□□Greg Wood occupies Property 17 Smith St. Geac
□□Tom Herd occupies Property 19 Smith St. Geac and Tom's Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the 'Owner and Occupier' and the Add "The Occupier" Option they would appear as follows on the Affected Properties Maintenance form:

Affected Property		Name	Mailing Address
13 Smith St, Geac	Owner	Martin Smith	13 Smith St, Geac
	Occupier	Martin Smith	13 Smith St, Geac
	Occupier	"The Occupier"	
14 Smith St, Geac	Owner	William Bird	96 Young St, Goodwood
	Occupier	"The Occupier"	
17 Smith St, Geac	Owner	Robyn White	Unit 6, 129 Smith St, Geac
	Occupier	Greg Wood	
	Occupier	"The Occupier"	
19 Smith St, Geac	Occupier	Tom Herd	19 Smith St, Geac
	Occupier	"The Occupier"	

"The Occupier" – No Options

Selecting the 'The Occupier' Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows an occurrence of "The Occupier" to be included against the Affected Properties that have been selected. Where the Affected Property that has been selected may have Occupier Role records associated to it these Occupier Role records are not included in the selection.

Example
□□Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
□□William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
□□Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
□□Greg Wood occupies Property 17 Smith St. Geac
□□Tom Herd occupies Property 19 Smith St. Geac and Tom's Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the "The Occupier" option only they would appear as follows on the Affected Properties Maintenance form.

Affected Property		Name	Mailing Address
13 Smith St, Geac	Occupier	"The Occupier"	
14 Smith St, Geac	Occupier	"The Occupier"	
17 Smith St, Geac	Occupier	"The Occupier"	
19 Smith St, Geac	Occupier	"The Occupier	

"The Occupier" – Add "The Occupier"

Selecting the 'The Occupier' Button with the Add "The Occupier" Options will perform the selection of the Affected Properties in the same way as if the "The Occupier" had been selected by itself.

Selecting these buttons allows an occurrence of "The Occupier" to be included against the Affected Properties that have been selected. Where the Affected Property that has been selected may have Occupier Role records associated to it these Occupier Role records are not included in the selection.

Example
□□Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
□□William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
□□Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
□□Greg Wood occupies Property 17 Smith St. Geac
□□Tom Herd occupies Property 19 Smith St. Geac and Tom's Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the "The Occupier" and the Add "The Occupier" Options they would appear as follows on the Affected Properties Maintenance form:

Affected Property		Name	Mailing Address
13 Smith St, Geac	Occupier	"The Occupier"	
14 Smith St, Geac	Occupier	"The Occupier"	
17 Smith St, Geac	Occupier	"The Occupier"	
19 Smith St, Geac	Occupier	"The Occupier	

Owner Button
Selecting the Owner Button with either no Options or in combination with one or more of the Option indicators checked ON will perform the selection of the Affected Properties in a certain way. For more details of the various combinations available please refer to the following sections:

Owner – No Options
Owner – Add "The Occupier"

Owner and "The Occupier"
Selecting the Owner and "The Occupier" Button with either no Options or in combination with one or more of the Option indicators checked ON will perform the selection of the Affected Properties in a certain way. For more details of the various combinations available please refer to the following sections:

Owner and "The Occupier" – No Options
Owner and "The Occupier" – Add "The Occupier"

Owner Only
Selecting the Owner Only Button with either no Options or in combination with one or more of the Option indicators checked ON will perform the selection of the Affected Properties in a certain way. For more details of the various combinations available please refer to the following sections:

Owner Only – No Options
Owner Only – Add "The Occupier"

Occupier
Selecting the Occupier Button with either no Options or in combination with one or more of the Option indicators checked ON will perform the selection of the Affected Properties in a certain way. For more details of the various combinations available please refer to the following sections:

Occupier – No Options
Occupier – Add "The Occupier"

Owner and Occupier

Selecting the Owner and Occupier Button with either no Options or in combination with one or more of the Option indicators checked ON will perform the selection of the Affected Properties in a certain way. For more details of the various combinations available please refer to the following sections:

Owner and Occupier – No Options
Owner and Occupier – Add “The Occupier”

“The Occupier”

Selecting “The Occupier” Owner Button with either no Options or in combination with one or more of the Option indicators checked ON will perform the selection of the Affected Properties in a certain way. For more details of the various combinations available please refer to the following sections:

“The Occupier” – No Options
“The Occupier” – Add “The Occupier”

Options - Concatenate Owner

When the Concatenate Owner Option is flagged on then all Owners Names will be concatenated when added as an Affected Property.

The first Owner listed will be selected as the identity nominated as the Owner and it will be this person’s mailing address that will be used for any documentation that will be issued to them.

If the Owners consist of a mixture of persons and companies then the above will still apply. The first Owner listed will be selected.

Example

□□Property 13 Smith St, Geac has owners of Martin Smith (mailing address of 13 Smith St, Geac), Nora Smith (mailing address of 13 Smith St, Geac) and Garland Cards Pty Ltd (mailing address of 154 Port Rd, Geac)

If the above property was selected as an Affected Property nominating the Option “Concatenate Owner” they would appear as follows on the Affected Properties Maintenance form

Affected Property		Name	Mailing Address
13 Smith St, Geac	Owner	Martin Smith & Others	13 Smith St, Geac

Options - Concatenate Occupier

When the Concatenate Occupier Option is flagged on then Occupier Names will be concatenated when added as an Affected Property.

The first Occupier listed will be selected as the identity nominated as the Occupier and it will be this person’s mailing address that will be used for any documentation that will be issued to them.

If the Occupiers consist of a mixture of persons and companies then the above will still apply. The first Occupier listed will be selected.

Example

□□Property 13 Smith St, Geac has Occupiers of Martin Smith (mailing address of 13 Smith St, Geac), Nora Smith (mailing address of 13 Smith St, Geac) and Garland Cards Pty Ltd (mailing address of 154 Port Rd, Geac)

If the above property was selected as an Affected Property nominating the Option “Concatenate Occupier” they would appear as follows on the Affected Properties Maintenance form

Affected Property		Name	Mailing Address
13 Smith St, Geac	Occupier	Martin Smith & Others	13 Smith St, Geac

Options – Add “The Occupier”

When the Add “The Occupier” Option has been flagged on then an occurrence of “The Occupier” is generated for Properties that have been selected as an Affected Property. Please refer to the individual Selection Options for details of the use of this option.

Options – Concatenate Same Name/Address

When the Concatenate Same Name/Address Option is flagged on then Owner/Occupier Names will be concatenated when added as an Affected Property. However the Concatenation process checks the Names and Addresses of Roles records and where the Surname and the Mailing address is the same for a number of people then they will be concatenated. If the surname and/or mailing address are different then it is not concatenated. This applies to Owner and Occupier Role records.

Example

Property 13 Smith St, Geac has Owners of Martin Smith (mailing address of 13 Smith St, Geac), Nora Smith (mailing address of 13 Smith St, Geac) and Garland Cards Pty Ltd (mailing address of 154 Port Rd, Geac)

If the above property was selected as an Affected Property nominating the Option “Concatenate on Name/Address” they would appear as follows on the Affected Properties Maintenance form

Affected Property		Name	Mailing Address
13 Smith St, Geac	Owner	M & N Smith	13 Smith St, Geac
	Owner	Garland Cards Pty Ltd	154 Port Rd, Geac

Bookings Batch Functions

The following topics are covered in this section:

Batch Invoice Generation Control

Batch Invoice Generation Control may only be used to print Invoices in bulk for **Recurring Bookings**. It will *not* function with non-recurring bookings. Additionally, the Booking Status or Booking Line Status must be set to a Confirmed Status in order for the Invoices to be generated.

Batch Invoice Generation Control Form

The Batch Invoice Generation Control form (which is used to print bulk Invoices for Recurring Bookings) will initially display all the Classes to which the user has Maintenance authority. To select a Class for processing the user must click on the 'Process' checkbox for the Class. This will cause the Class to have focus and the Merge Type fields will become available. A Merge Type must be selected for each of these fields. The Merge Types available for selection will be valid for the Merge Class, i.e. Invoices or Bond Invoices (provided the user has authority to them).

The following rules will apply:

If 'Bonds on Separate Invoice' is 'OFF'

- If a 'normal' INVOICE Merge Type only is selected, then ALL Fee Charges (including Bond Fees) will be included on one Invoice
- If a BOND INVOICE Merge Type only is specified, then only Bond Fees will be included on a 'Bond' Invoice
- If BOTH Merge Types (INVOICE and BOND) are specified, then Bond Fees will be included on a Bond Invoice and normal Fees will be included on a normal Invoice

If 'Bonds on Separate Invoice' is ON

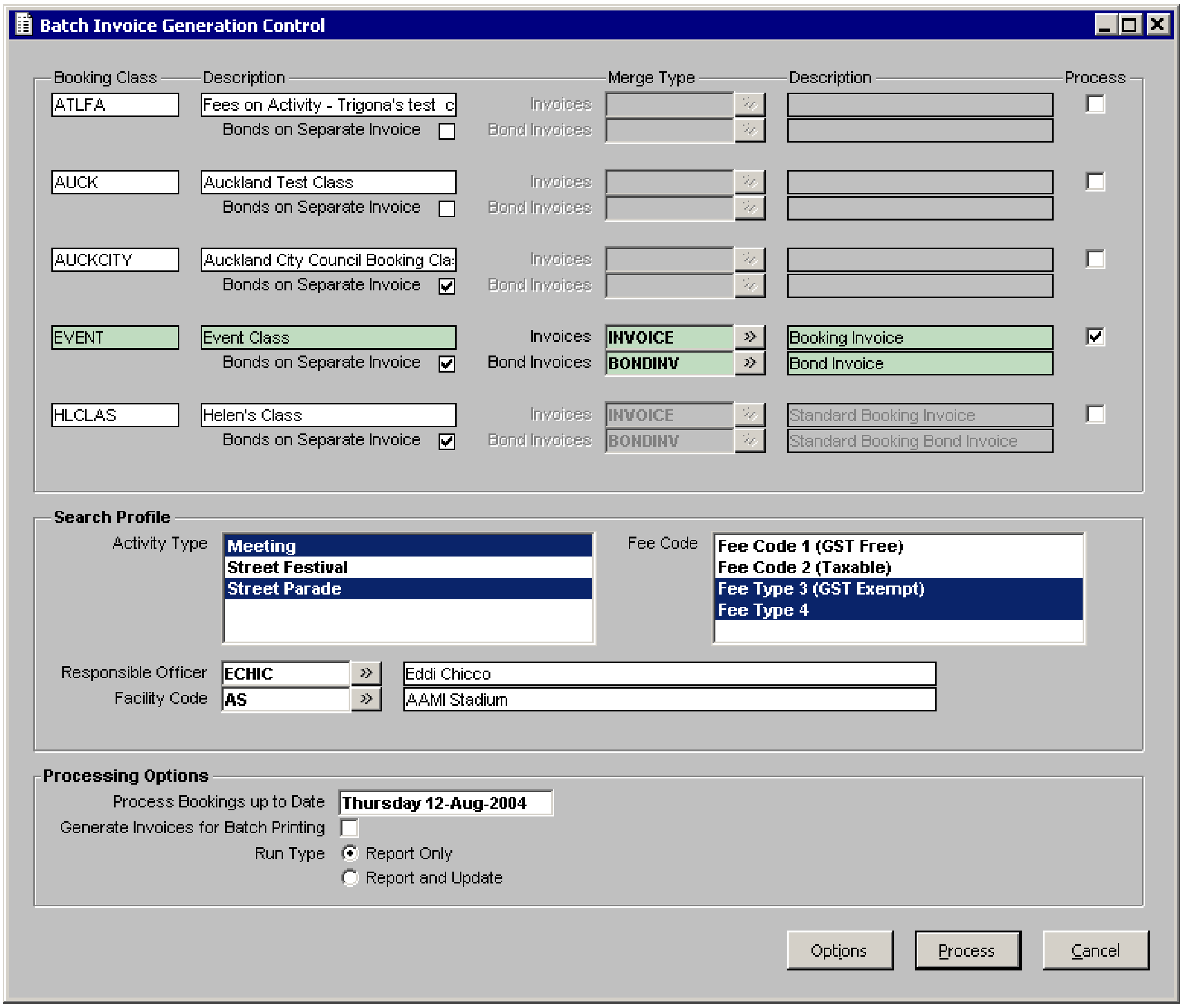
- If a 'normal' INVOICE Merge Type *only* is specified, then *only* non-Bond Fee Charges will be included on a 'normal' Invoice
- If a BOND INVOICE Merge Type *only* is specified, then *only* Bond Fee Charges will be produced on a 'Bond' Invoice
- If both a 'normal' INVOICE and a BOND INVOICE Merge Type are specified, then Bond Fee Charges will be separated and produced on a 'Bond' Invoice. 'Normal' Fee charges will be included on a 'normal' Invoice

The Search Profile fields will also become available for the selected class. The lists of Activity Types and Fee Codes will be those applicable to the selected Class. Activity Types and Fee Types may be selected by clicking on them. If none of the items is selected, the form will assume that ALL of the displayed items are required and will automatically set them ON.

Similarly, a Responsible Officer and/or a Facility may be selected. No selection means ALL Responsible Officers or Facilities for the Class.

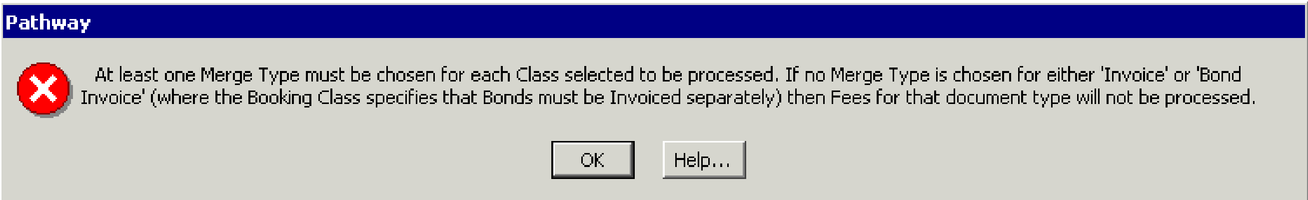
The Processing Options allow the entry of a Date, up to and including which Fees will be processed. The user may specify that Invoices are to be generated for later 'Batch' printing, otherwise any Invoices will be generated and printed as a part of this Batch job.

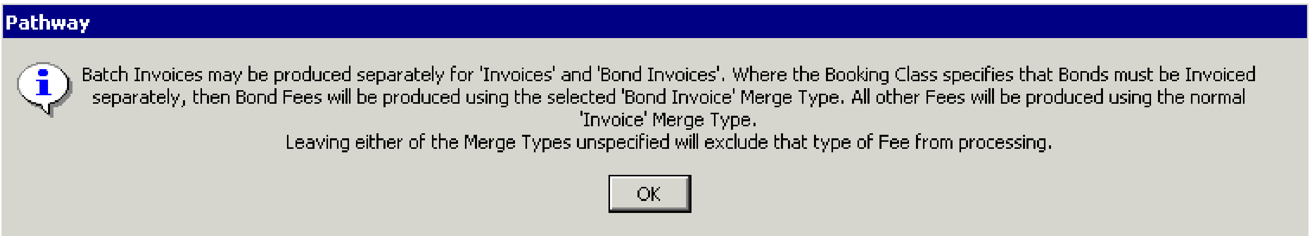
The 'Report Only' option allows the user to view the results before final processing.



Batch Invoice Generation Control Form

If the 'Process' flag is set ON for a Bookings Class, then a Merge Type must be selected before any processing can be performed. The following messages will display if Merge Types have not been set up or specified and the Process button has been selected.





A Report is produced when processing occurs either in 'Report Only' mode or 'Report and Update' mode. The Report Header will contain details of all the selections made and Search Profile details. The Body of the Report will detail each Booking and the sets of Fees that are either proposed to be, or actually generated as Invoices depending on the Processing Option selected. If Bonds are to be invoiced separately, then the Bond Invoice Details will be listed separately on the Report.

Note: The Booking Requests or Booking Lines must have a Status of 'Confirmed' to be considered eligible for Invoicing.

Note: Any errors that would prevent an Invoice from being raised will be detailed on the Report, e.g. if the Debtor had exceeded their Credit Limit, e.g. Error Status: -115 the Credit Limit for Debtor xxxx has been exceeded.

In 'Report Only' mode the Invoice Number details will not be available and therefore this field will be listed as (none) on the Report. However, in Report & Update mode, the actual Invoice Number, e.g. 'Invoice Number: 7205' will be printed.

Booking Class/Description

The Booking Class /Description fields will list all the Bookings Management Classes to which the user has Maintenance Authority.

Bonds on Separate Invoice

If 'Bonds on Separate Invoice' has been flagged ON at the Booking Class parameter level, then this flag will be checked ON on this form. Initially both Merge Type fields (Invoices and Bond Invoices) are dimmed but will become available when the 'Process' flag is checked ON. If 'Bonds on Separate Invoice' is OFF at the Booking Class parameter level, then this flag will be OFF on this form for that particular Class. This indicator controls invoice processing and the following rules will apply :

If 'Bonds on Separate Invoice' is 'OFF'

- If a 'normal' INVOICE Merge Type only is selected, then ALL Fee Charges (including Bond Fees) will be included on one Invoice
- If a BOND INVOICE Merge Type only is specified, then only Bond Fees will be included on a 'Bond' Invoice
- If BOTH Merge Types (INVOICE and BOND) are specified, then Bond Fees will be included on a Bond Invoice and normal Fees will be included on a normal Invoice

If 'Bonds on Separate Invoice' is ON

- If a 'normal' INVOICE Merge Type *only* is specified, then *only* non-Bond Fee Charges will be included on a 'normal' Invoice
- If a BOND INVOICE Merge Type *only* is specified, then *only* Bond Fee Charges will be produced on a 'Bond' Invoice
- If both a 'normal' INVOICE and a BOND INVOICE Merge Type are specified, then Bond Fee Charges will be separated and produced on a 'Bond' Invoice. 'Normal' Fee charges will be included on a 'normal' Invoice

Merge Type/Description

These fields allow a Merge Type to be keyed in or selected from the Pop Up. Only those Merge Types valid for the Merge Class will be available for selection, i.e. Invoices or Bond Invoices.

Process Indicator

To select a Class for processing the 'Process' flag must be checked ON. This causes the Class to have focus and the Merge Type entry fields to become available. Both Merge Type fields will become available, however, the rules below will apply depending on whether the 'Bonds on Separate Invoice' flag is checked ON or OFF.

If 'Bonds on Separate Invoice' is 'OFF'

- If a 'normal' INVOICE Merge Type only is selected, then ALL Fee Charges (including Bond Fees) will be included on one Invoice

- If a BOND INVOICE Merge Type only is specified, then only Bond Fees will be included on a 'Bond' Invoice
- If BOTH Merge Types (INVOICE and BOND) are specified, then Bond Fees will be included on a Bond Invoice and normal Fees will be included on a normal Invoice

If 'Bonds on Separate Invoice' is ON

- If a 'normal' INVOICE Merge Type *only* is specified, then *only* non-Bond Fee Charges will be included on a 'normal' Invoice
- If a BOND INVOICE Merge Type *only* is specified, then *only* Bond Fee Charges will be produced on a 'Bond' Invoice
- If both a 'normal' INVOICE and a BOND INVOICE Merge Type are specified, then Bond Fee Charges will be separated and produced on a 'Bond' Invoice. 'Normal' Fee charges will be included on a 'normal' Invoice

Search Profile – Activity Type

The Activity Type Search Profile will default all Activity Types specific to a particular Booking Class when focus is placed on the Booking Class. However, the field remains dimmed unless the 'Process' button corresponding to the Booking Class is checked ON. Once available, the options may be selected or deselected by clicking. If none of the items is selected, the form assumes that the user requires ALL of the displayed items and will automatically select them.

Search Profile – Fee Code

The Fee Code Search Profile will default all Fee Codes specific to a particular Booking Class when focus is placed on the Booking Class. However, the field remains dimmed unless the 'Process' button corresponding to the Booking Class is checked ON. Once available, the options may be selected or deselected by clicking. If none of the items is selected, the form assumes that the user requires ALL of the displayed items and will automatically select them.

Search Profile – Responsible Officer

A Responsible Officer may be keyed in or selected from the Pop Up, to be included in the Search Profile. Leaving this field blank will include ALL Responsible Officer in the search.

Search Profile – Facility Code

A Facility Code may be keyed in or selected from the Pop Up, to be included in the Search Profile. Leaving this field blank will include ALL Facilities in the search.

Processing Options – Process Bookings to Date

This field allows entry of a Date, up to and including which Fees will be processed, i.e. if a Date of Saturday 30-Oct-2004 is entered (or selected from the Calendar Pop Up) then all uninvoiced Fee Charges up to and including this date will be processed.

Processing Options – Generate Invoices for Batch Printing

If this flag is checked ON the Invoices will not be printed interactively. They will be flagged with a 'new' status and may be printed via Batch Printing at a later time. The menu option to facilitate Batch Printing of Invoices is 'Batch Print'.

Processing Options – Run Options

Processing Options include the following:

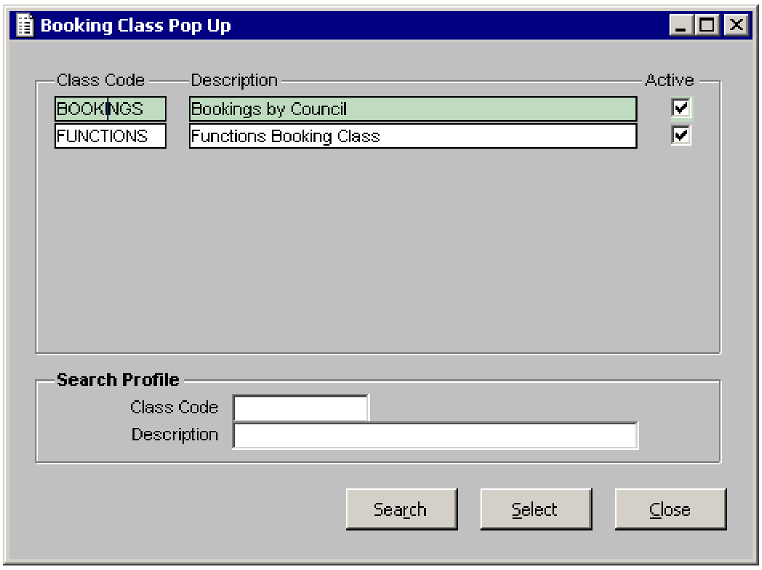
- Report Only
- Report and Update

If Report Only is selected then only a Report is produced and no invoices are generated. If 'Report and Update' is selected then a Report and Invoices are generated and printed. (However, if the 'Generate Invoices for Batch Printing' flag is checked ON, then only the Report is printed interactively and the invoices may be printed at a later time via Batch Printing). Once the Invoices have been generated (irrespective of whether or not they have been printed) the Invoiced flag against each processed Fee Charge will become checked ON.

Note: If processing takes place on a Booking Request but an error is reported with the Debtor (e.g. exceeded credit limit) then the Invoices will not be generated.

Batch Printing

Booking Class Pop Up Form



Booking Class Pop Up form

Class Code/Description

These fields display the Class Code and Description of all Booking Classes to which the user is authorised. One Class is available for selection at a time.

Active

This flag is an On/Off indicator which determines whether the Booking Class is active and available for use. This flag is display only and cannot be maintained.

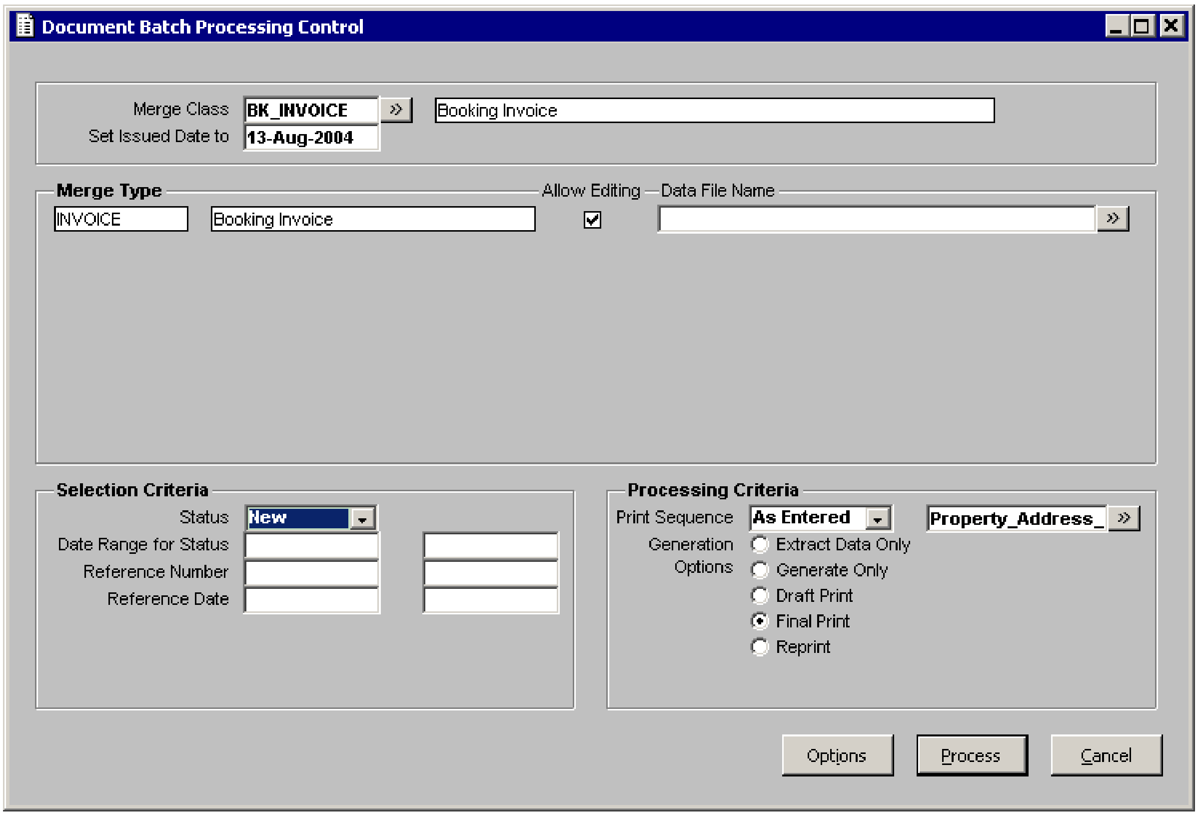
Search Profile – Class Code/Description

Enter, or select from the Pop Up, a Class Code and/or Description on which to base your search.

Document Batch Processing Control Form

This form displays when the Batch Print menu option is selected. It allows the user to print Invoices which have been generated through the Batch Invoice Generation Control. A Merge Class is required e.g. Booking Invoice, and, once specified, all Merge Types of this Class will display for selection.

In order to generate and print new Invoices, the Status must be set to 'New'. The Generation Options will default to 'Final Print' but 'Reprint' may be selected if Invoices have already been printed once. (Note: Other Generation Options are not available for Bookings Invoice Printing.)



Document Batch Processing Control form

Audit Set Reporting

The Audit Set Report function has been provided to enable database modifications across a set of related tables to be reported as a single unit.

The Audit Set Report function does not capture any additional information into the Audit table, (CAUAUDT), but is reliant on all Bookings Management Entities being audited.

The Audit Set Report function consists of the “Audit Set Maintenance” and “Audit Set Report” menu options, which are found under the Auditing menu option in the main Pathway menu.

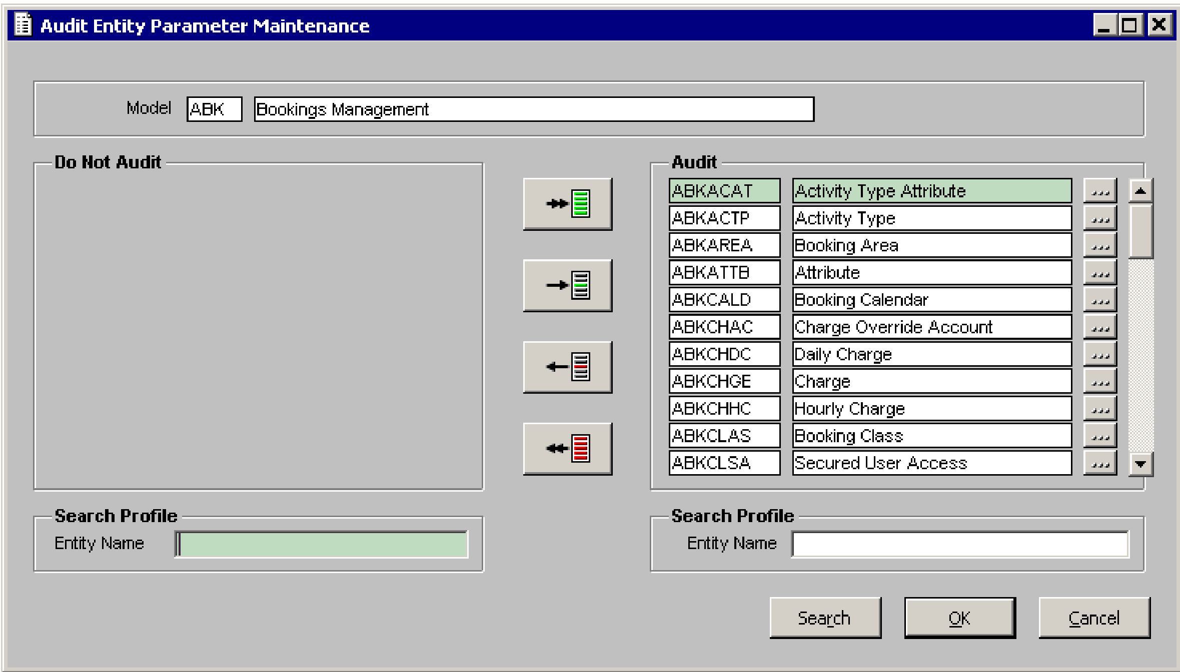
The sections below describe how to establish a comprehensive Audit facility to track all modifications to the Bookings Management system.

Establishing a Bookings Management Audit Set

The Audit Set Maintenance menu option is used to define what database modifications to “Bookings Management” tables are to be reported.
In order to define an Audit Set for the Bookings Management application all Bookings Management Entities need to be audited,

i.e.:
Select the “Auditing >> Audit Model Maintenance” menu option and ensure that the “ABK Bookings Management” Model has been selected.
Select the “Detail” button adjacent to the “ABK Bookings Management” entry and ensure that all “ABK” tables have been selected,

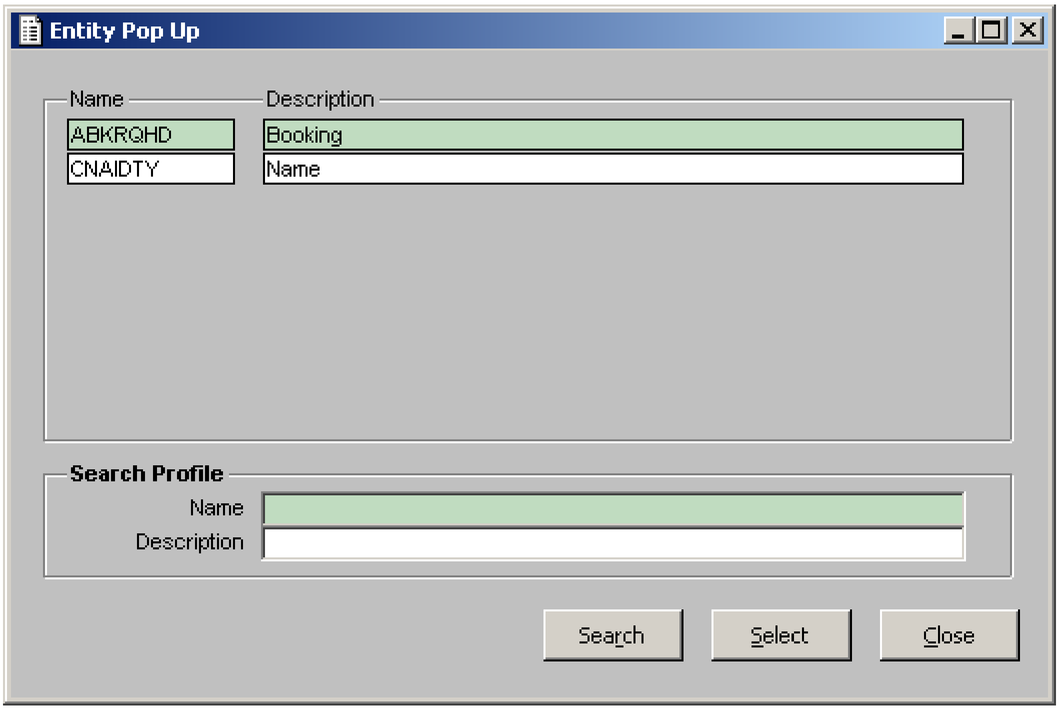
i.e.:



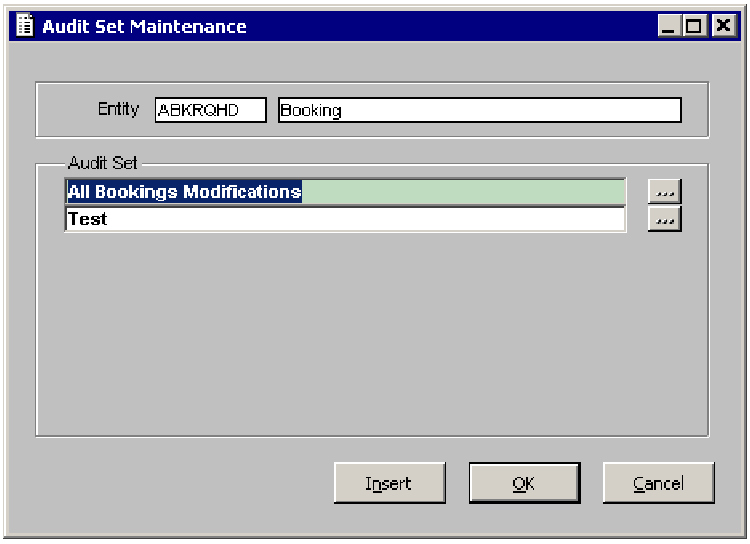
Audit Set Maintenance

The establishment of an Audit Set can best be described with a fully functional example.
It is recommended that you adopt this example as an initial base and perform any adjustments after viewing the resultant reports.

Select the “Auditing >> Audit Set Maintenance” menu option and the following form will appear.



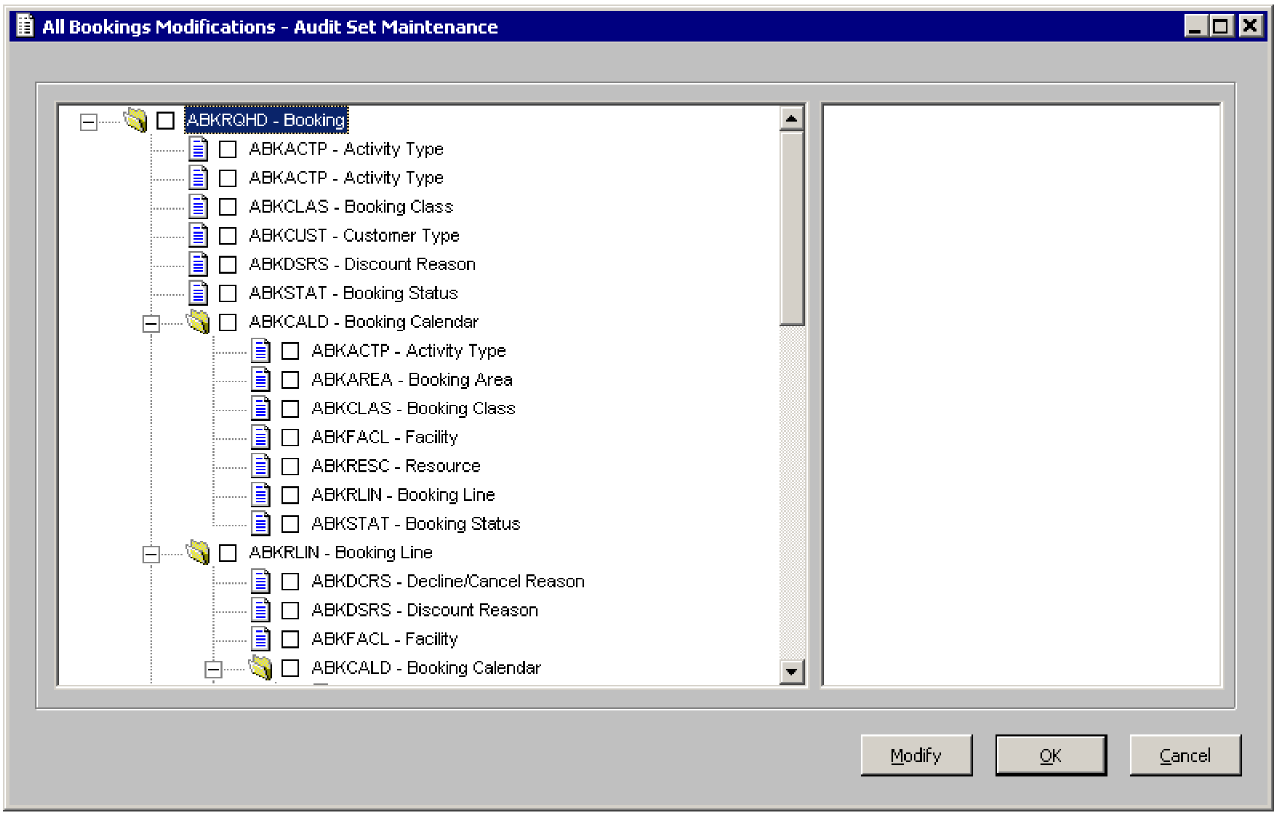
Select the Entity ABKRQHD.
Create a new Audit Set called “All Bookings Modifications”,
i.e.:



Select the “Detail” button adjacent to the newly created Audit Set to define what modifications are to be reported.

Click the “+” adjacent to the “ABKRQHD – Booking” entry to display the entire Bookings Management relationship structure,

i.e.:



The Tree on the left hand side of the form displays the relationships between the Bookings Management entities.

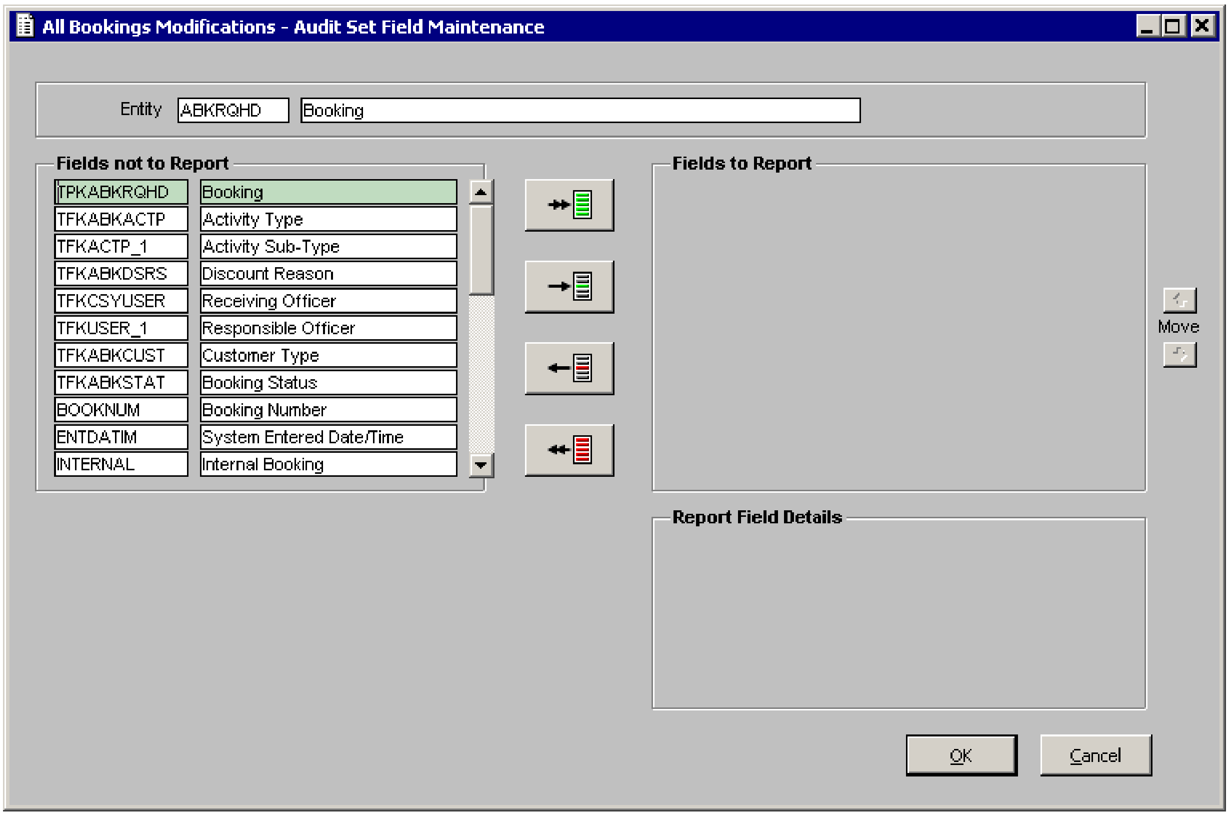
A "tick" in the box adjacent to an entity indicates that fields have been selected for this entity and will be reported.

The List on the right hand side of the form displays the fields that have been selected for the highlighted entity.

Initially no fields will be selected and therefore all the entity boxes will not be "ticked" and the right hand side field list will be empty for all entities.

Highlight the "ABKRQHD – Booking" entity with a single left mouse click and select the [Modify] button to select the fields for the entity,

i.e.:



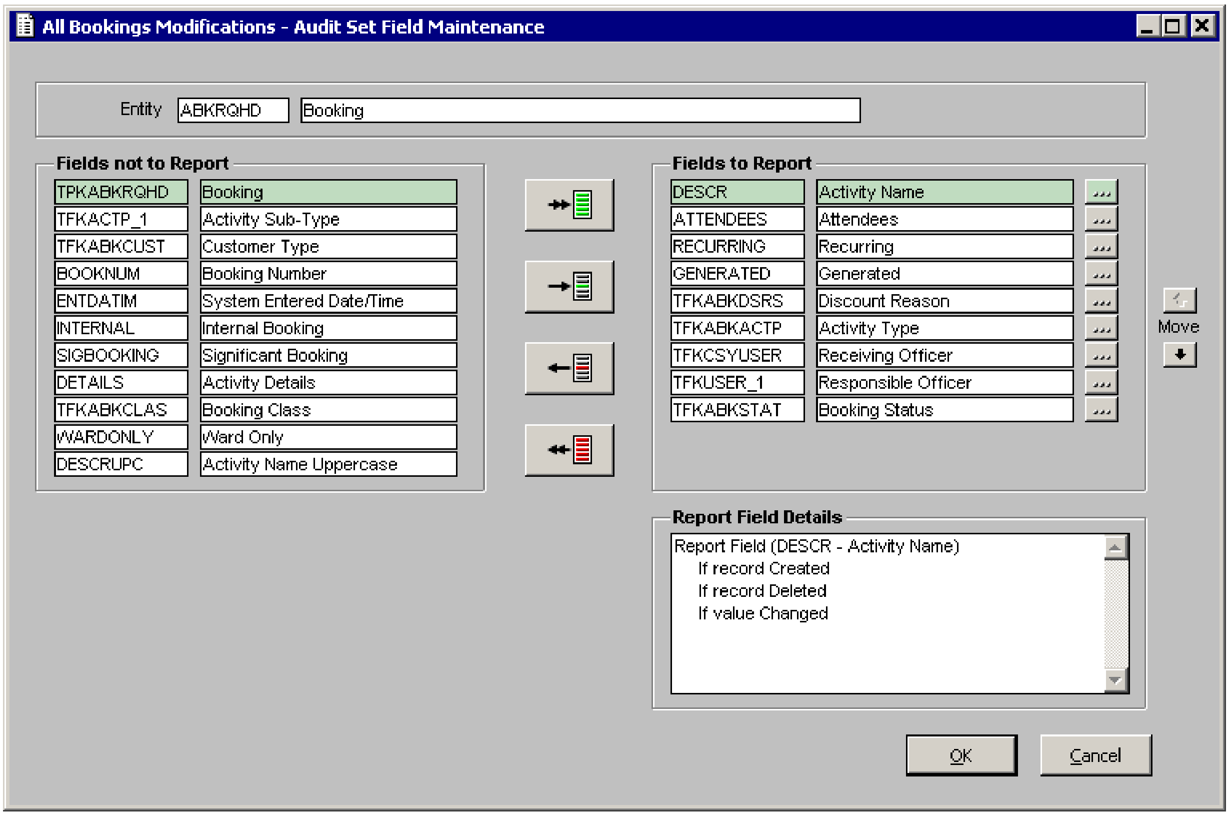
The “Fields not to Report” frame contains the fields on the entity that will not be reported when a record is created, deleted or updated.

The “Fields to Report” frame contains the fields on the entity that will be reported when a record is created, deleted or updated.

Use the [Select One] button to move the following fields to the “Fields to Report” frame:

DESCR – Activity Name
ATTENDEES – Attendees
RECURRING – Recurring
GENERATED – Generated
TFKABKDSRS – Discount Reason
TFKABKACTP – Activity Type
TFKCSYUSER – Receiving Officer
TFKUSER_1 – Responsible Officer
TFKABKSTAT – Booking Status

i.e.:

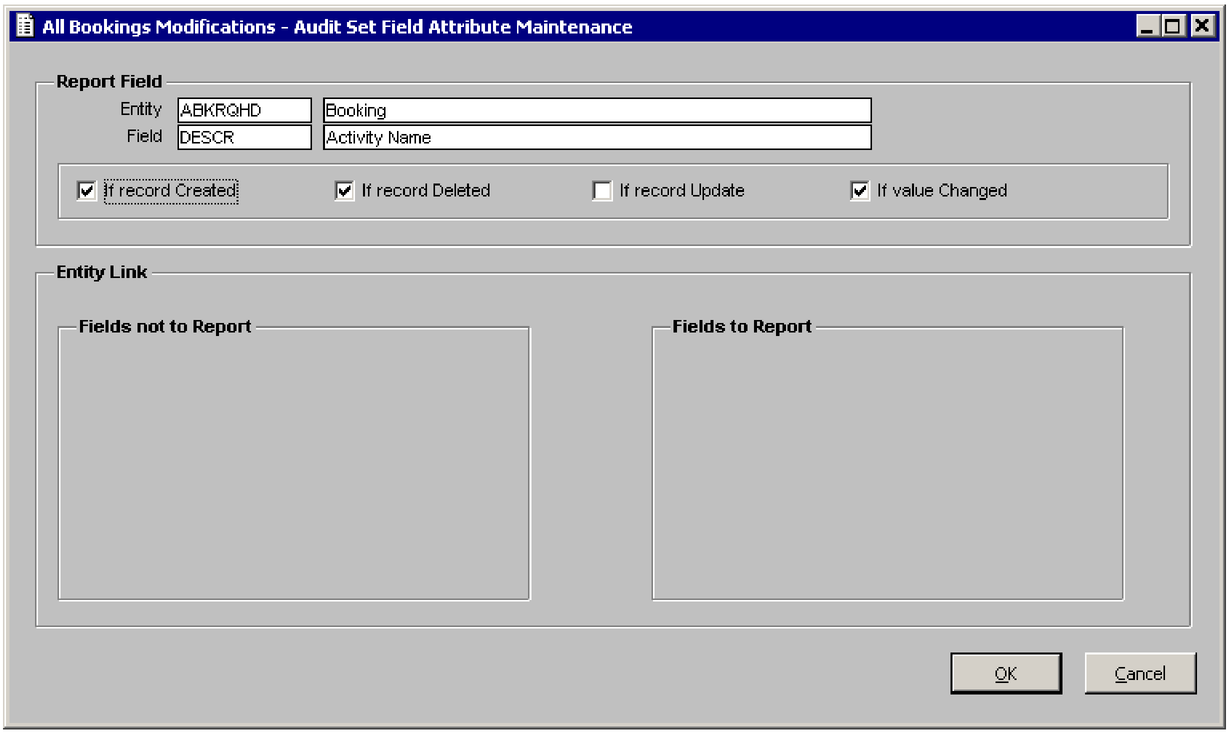


There is no point in selecting the BOOKNUM and ENTDATIM fields as these fields are system generated and cannot be directly maintained by users.

The “Report Field Details” frame contains the reporting attributes for the field highlighted in the “Fields to Report” frame and avoids the need to use the [Detail] button to view the attributes selected for the field.

Select the [Detail] button adjacent to the “DESCR – Activity Name” field in the “Report Field Details” frame to define the reporting attributes.

I.e.:



The check boxes within the “Report Field” frame indicate when the field should be reported.

The “If record Created” check box indicates that the field will be reported when a new record is added to the entity.

The “If record Deleted” check box indicates that the field will be reported when a record is deleted from the entity.

The “If record Updated” check box indicates that the field will be reported when a record is updated in the entity regardless of whether the value of the specific field is changed.

The “If value Changed” check box indicates that the field will be reported when a record is updated in the entity and the value of this specific field is changed.

The “If record Updated” and “If value Changed” indicators are dependent on each other as the “If value Changed” indicator is irrelevant when the “If record Updated” indicator is checked on.

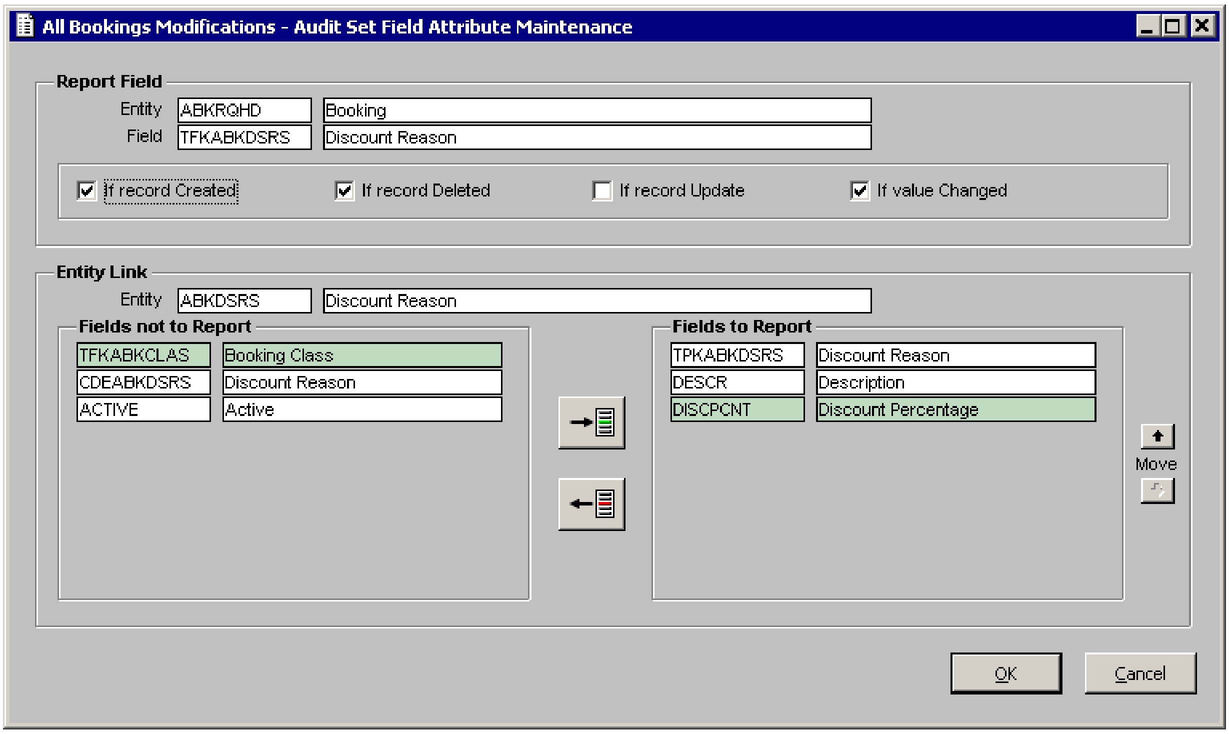
Checking on the “If record Updated” indicator will automatically check off the “If value Changed” indicator.

Checking off both the “If record Updated” and “If value Changed” indicators will mean that the field is not reported when a record is updated.

At least one “Report Field” attribute needs to be selected as there is no point in the field being selected if it will not be reported under any database modification condition.

The “Entity Link” frame is only relevant to Foreign Key fields and explained under the TFKABKDSRS field attributes definition section below.

TFKABKDSRS – Discount Reason



The TFKABKDSRS field is a foreign key to the Discount Reason entity ABKDSRS.
The "Entity Link" frame allows for the optional selection of ABKDSRS fields to be reported in association with a TFKABKDSRS value.

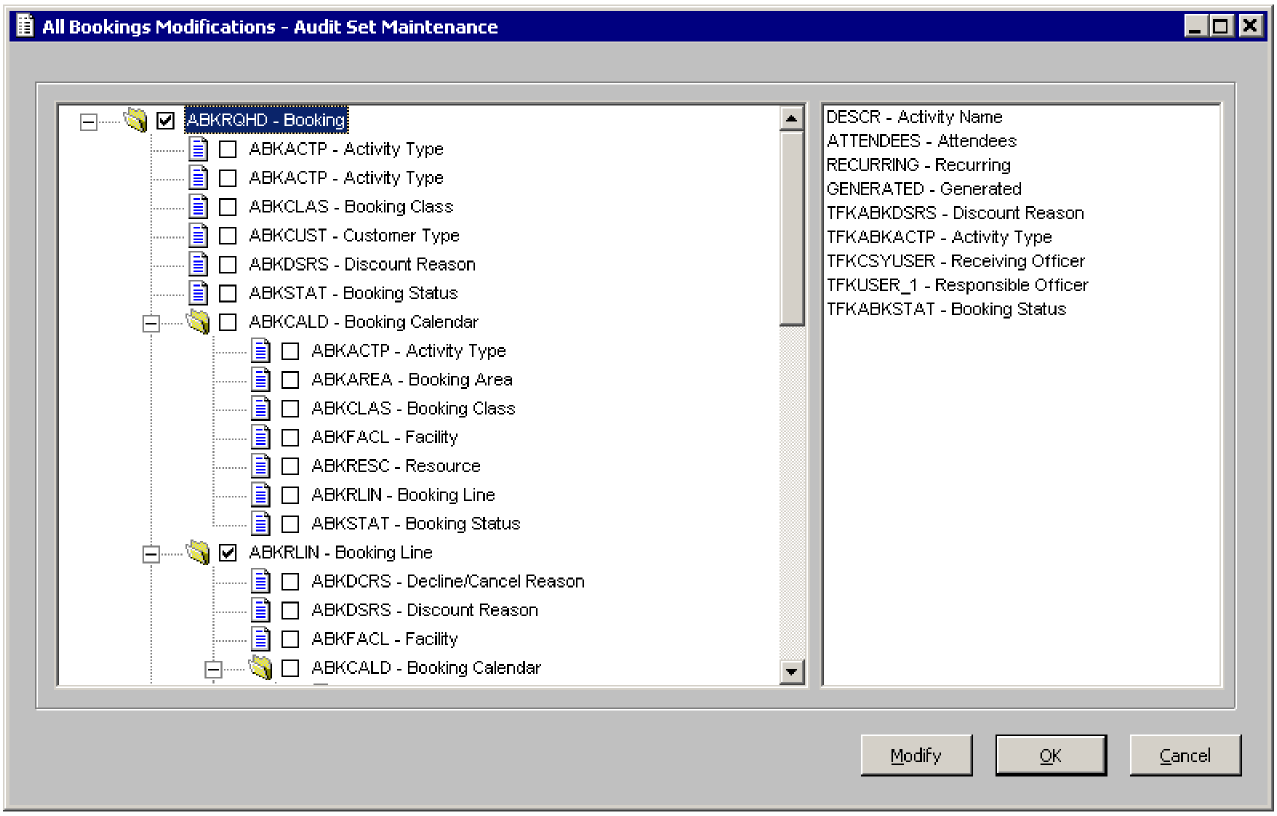
For Example:
If the Discount Reason on a Booking is changed from "Charity Discount" to "10% Discount" then the Audit Set report will show a change in TFKABKDSRS from say 18 to 20.

The inclusion of the CDEABKDSRS, DESCR and DISCPCNT fields from the ABKDSRS entity will report the Code, Description and Discount Percentage changes in conjunction with the actual TFKABKDSRS change.

The following table summarizes what fields and attributes could be selected for ABKRQHD – Booking:

Entity Path: ABKRQHD					
Report Field	**If record Created**	**If record Deleted**	**If Record Updated**	**If value Changed**	**Entity Link Fields to Report**
DESCR	Yes	Yes	No	Yes	
ATTENDEES	Yes	Yes	No	Yes	
RECURRING	Yes	Yes	No	Yes	
GENERATED	Yes	Yes	No	Yes	
TFKABKDSRS	Yes	Yes	No	Yes	CDEABKDSRS, DESCR, DISCPCNT
TFKABKACTP	Yes	Yes	No	Yes	CDEABKACTP, DESCR
TFKCSYUSER	Yes	Yes	No	Yes	USERID, USERNAME
TFKUSER_1	Yes	Yes	No	Yes	USERID, USERNAME
TFKABKSTAT	Yes	Yes	No	Yes	CDEABKSTAT, DESCR, SYSTEMSTAT

The result of defining the ABKRQHD – Booking reporting field is shown below.



Note that the box adjacent to the ABKRQHD – Booking entity has been "ticked" and the right hand side list contains the selected fields.

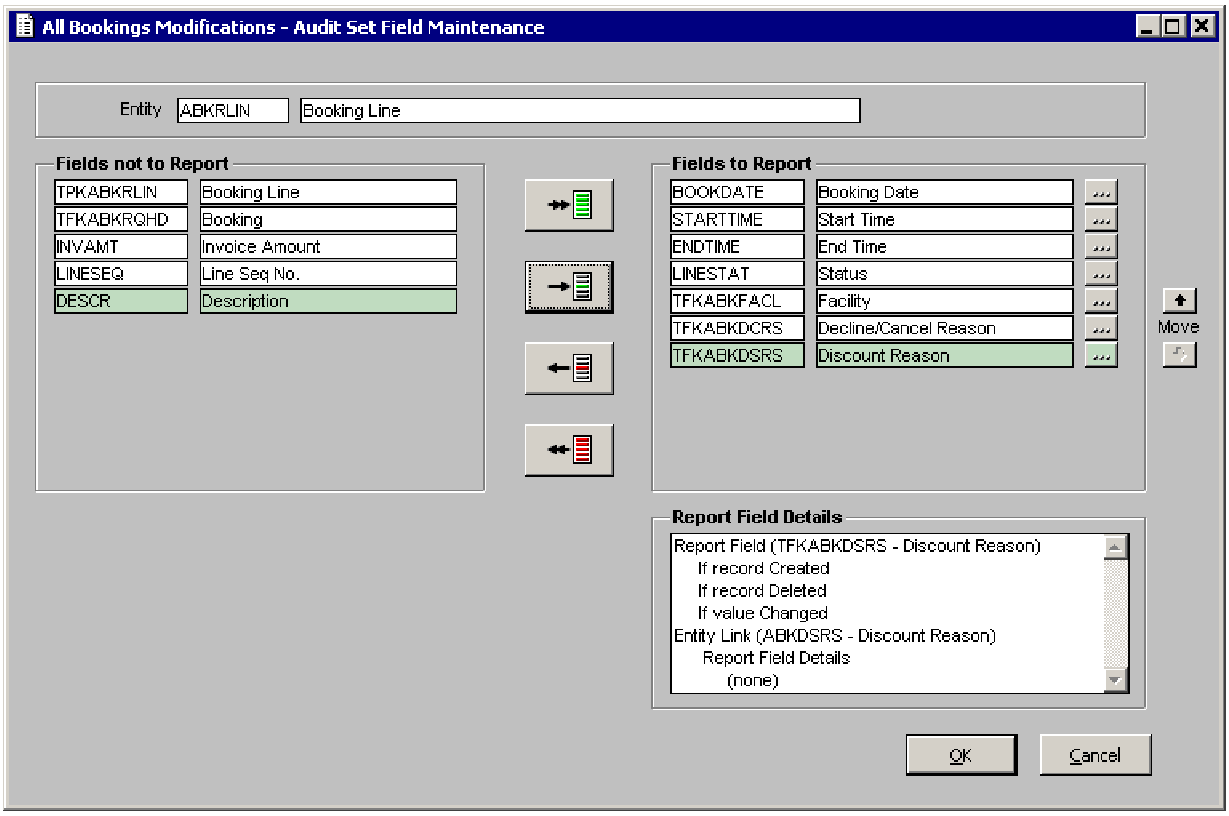
Define the report fields for the ABKRLIN – Booking Line entity.

Highlight the "ABKRLIN – Booking Line entity and select the [Modify] button.

Use the [Select One] button to move the following fields to the "Fields to Report" frame:

BOOKDATE – Booking Date
STARTTIME – Start Time
ENDTIME – End Time
LINESTAT – Status
TFKABKFACL – Facility
TFKABKDCRS – Decline/Cancel Reason
TFKABKDSRS – Discount Reason

i.e.:



Select the [Detail] button adjacent to each field in the “Report Field Details” frame to define the reporting attributes.

The following table summarizes what fields and attributes could be selected for ABKRLIN – Booking Line

Entity Path: ABKRQHD > ABKRLIN					
Report Field	**If record Created**	**If record Deleted**	**If Record Updated**	**If value Changed**	**Entity Link Fields to Report**
BOOKDATE	Yes	Yes	No	Yes	
STARTTIME	Yes	Yes	No	Yes	
ENDTIME	Yes	Yes	No	Yes	
LINESTAT	Yes	Yes	No	Yes	
TFKABKFACL	Yes	Yes	No	Yes	CDEABKFACL, DESCR
TFKABKDCRS	Yes	Yes	No	Yes	CDEABKDCRS, DESCR
TFKABKDSRS	Yes	Yes	No	Yes	CDEABKDSRS, DESCR, DISCPCNT

Audit Set Entities to Select

Generally there is no need to define reporting fields for parameter entities as the maintenance of these entities is limited to the application administrator and their content is modified very infrequently.
The impact of modifying a parameter entity can result in thousands of Bookings being reported.

For Example:
If the “ABKCLAS – Booking Class” is included in the Audit Set then a modification to the Allow Facility Fee Flag would result in every Booking that is in that Class being reported.

“All Bookings Modifications” Audit Set Definition

The following tables indicate what entities and fields could be selected to define a complete Audit Set for the Bookings Management application.

You can adopt this example as an initial base and perform any adjustments after viewing the resultant reports.

Entity Path: ABKRQHD					
Report Field	**If record Created**	**If record Deleted**	**If Record Updated**	**If value Changed**	**Entity Link Fields to Report**
DESCR	Yes	Yes	No	Yes	
ATTENDEES	Yes	Yes	No	Yes	
RECURRING	Yes	Yes	No	Yes	
GENERATED	Yes	Yes	No	Yes	
TFKABKDSRS	Yes	Yes	No	Yes	DESCR
TFKABKACTP	Yes	Yes	No	Yes	DESCR
TFKCSYUSER	Yes	Yes	No	Yes	USERNAME
TFKUSER_1	Yes	Yes	No	Yes	USERNAME
TFKABKSTAT	Yes	Yes	No	Yes	DESCR

Entity Path: ABKRQHD > ABKRLIN					
Report Field	**If record Created**	**If record Deleted**	**If Record Updated**	**If value Changed**	**Entity Link Fields to Report**
BOOKDATE	Yes	Yes	No	Yes	
STARTTIME	Yes	Yes	No	Yes	
ENDTIME	Yes	Yes	No	Yes	
LINESTAT	Yes	Yes	No	Yes	
TFKABKFACL	Yes	Yes	No	Yes	DESCR
TFKABKDCRS	Yes	Yes	No	Yes	DESCR
TFKABKDSRS	Yes	Yes	No	Yes	DESCR

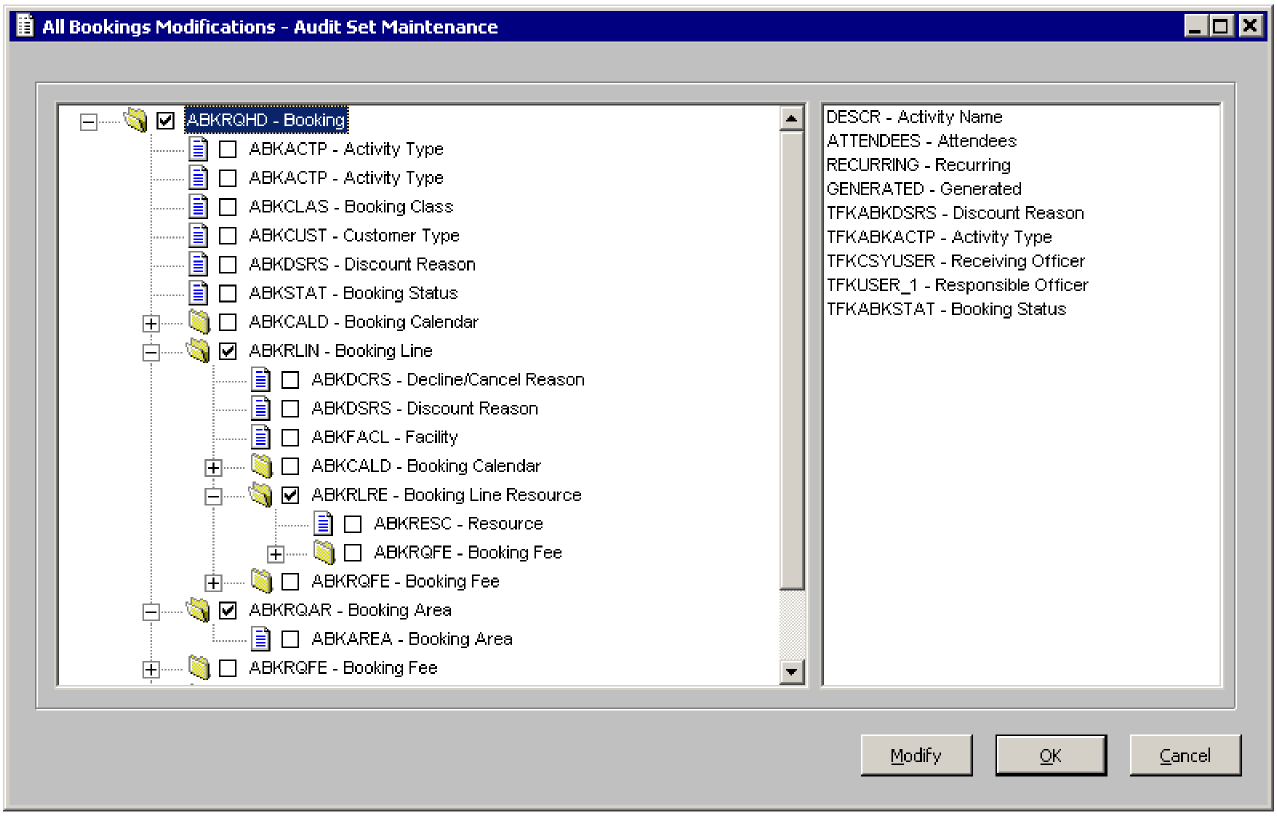
Entity Path: ABKRQHD > ABKRLIN > ABKRLRE					
Report Field	**If record Created**	**If record Deleted**	**If Record Updated**	**If value Changed**	**Entity Link Fields to Report**
TFKABKRESC	Yes	Yes	No	No	DESCR

Entity Path: ABKRQHD > ABKRQAR					
Report Field	**If record Created**	**If record Deleted**	**If Record Updated**	**If value Changed**	**Entity Link Fields to Report**
TFKABKAREA	Yes	Yes	No	No	DESCR

Entity Path: ABKRQHD > ABKRQNT					
Report Field	**If record Created**	**If record Deleted**	**If Record Updated**	**If value Changed**	**Entity Link Fields to Report**
TFKABKNTYP	Yes	Yes	No	Yes	DESCR

Entity Path: ABKRQHD > ABKRQRP					
Report Field	**If record Created**	**If record Deleted**	**If Record Updated**	**If value Changed**	**Entity Link Fields to Report**
DAYPATT	Yes	Yes	No	Yes	
WEEKPATT	Yes	Yes	No	Yes	
MTHPATT	Yes	Yes	No	Yes	
YEARPATT	Yes	Yes	No	Yes	
D_DAYFREQ	Yes	Yes	No	Yes	
W_WEEKFREQ	Yes	Yes	No	Yes	
STARTDATE	Yes	Yes	No	Yes	
ENDDATE	Yes	Yes	No	Yes	
NUMOCC	Yes	Yes	No	Yes	

The result of defining all the reporting fields specified is shown below.



Use the Scroll Bar to ensure that the ABKRQNT and ABKRQRP entities are also “Ticked”

Audit Set Report

It is envisaged that the Audit Set Report will be executed periodically through the standard End of Day scheduling.

The “From Previous Report” indicator on the Audit Set Report Control form provides the ability to report all modifications that have occurred since the report was previously produced.

In order for the “From Previous Report” function to operate a report must be produced to provide an initial starting point.

Initial Starting Point Production
Select the “Auditing >> Audit Set Report” menu option.

An Entity Pop Up form is shown.

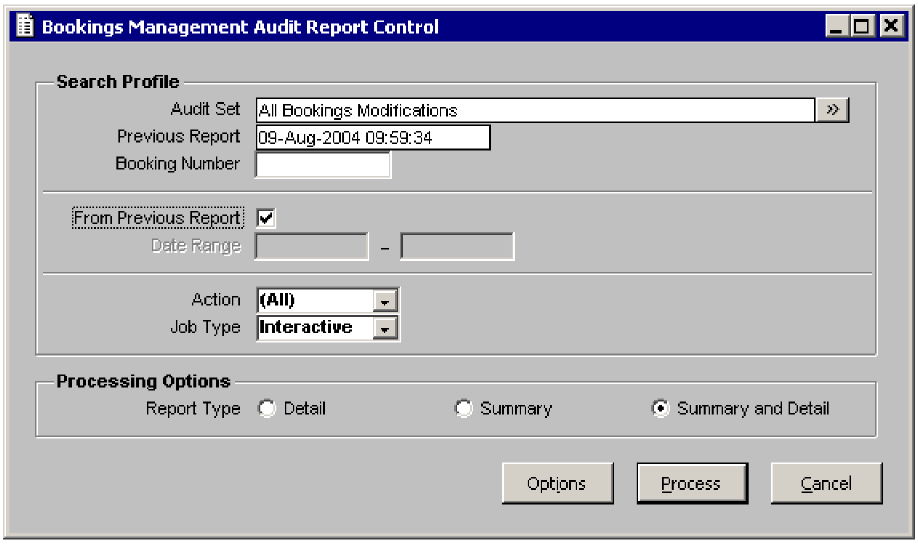
Select the Entity ABKRQHD.

Select the Audit Set [Pop Up] button to select the “All Bookings Modifications” previously defined Audit Set.

The “Previous Report” will automatically default to the current date without a time as no report has been previously produced.

Check the “From Previous Report” indicator.

i.e.



Select the "Process" button and execute the report interactively to report all Bookings modifications that have occurred during the current day.

End of Day Scheduling
Select the "Auditing >> Audit Set Report" menu option

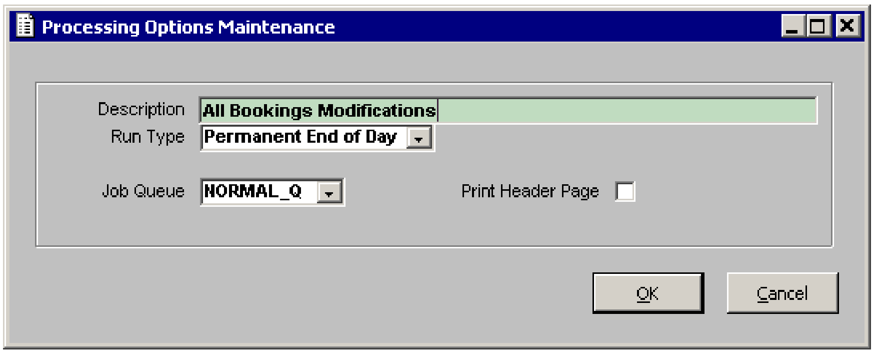
The "Previous Report" will automatically default to the date and time at which the report was previously produced.

Select the Audit Set [Pop Up] button to select the "All Bookings Modifications" previously defined Audit Set.

Check the "From Previous Report" indicator.

Select the "Process" button and schedule the report for the nightly End of Day process.
(The "End of Calendar Day" and "Schedule" button can be used to define an alternate frequency if desired.)

i.e.



Report Type
The "Report Type" Processing Option indicates what reports to produce.

The "Summary" report is a compressed list of the Bookings that have been modified or have had subordinate entities modified.

The "Detail" report is a comprehensive report of the Bookings Management database updates and the Bookings that were affected.

Ad Hoc Reporting

A number of “Search Profile” options have been provided to enable detailed investigation into the database updates that have been performed on the Bookings Management entities.

The “Booking Number” field allows the entry of a specific Booking Number. The report produced will only contain database updates that affect this Booking Number.

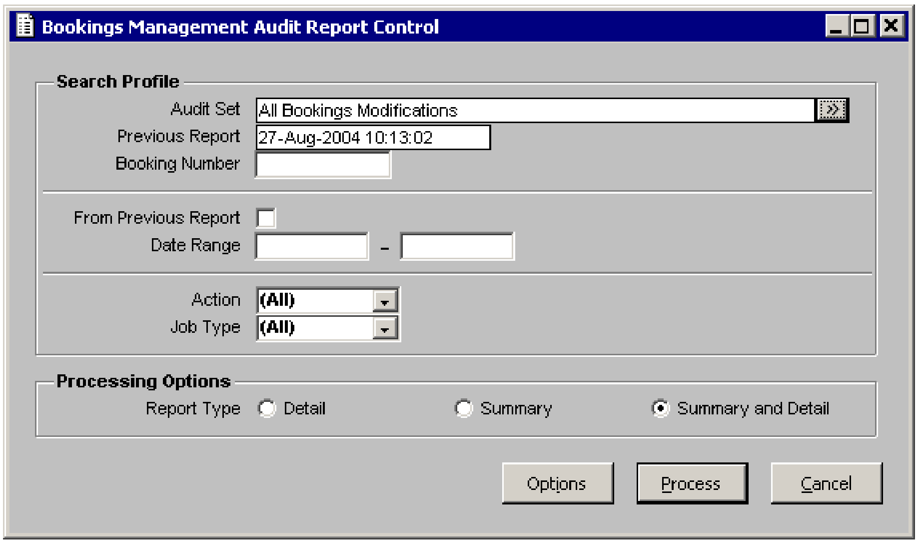
The “Date Range” entry fields are enabled if the “From Previous Report” indicator is checked off.
The report produced will only contain database updates that occurred between the two dates.

The “Action” dropdown list box allows for the selection of what type of database modifications to report. This selection allows you to limit the report to only show records that were created, or records that were deleted, or records that were updated.

The “Job Type” dropdown list box allows for the selection of what type of job performed the database modifications. This selection allows you to limit the report to only show database modifications that were performed by Interactive or Batch jobs. Selecting “Interactive” will eliminate the thousands of updates that would have been reported in a Batch process.

Bookings Management Audit Report Control Form

It is envisaged that the Bookings Management Audit Set Report will be executed periodically through the standard End of Day scheduling. This report provides the ability to report all modifications that have occurred in the Bookings Management module.



Bookings Management Audit Report Control form

Audit Set

Select the Audit Set Pop Up Button to select a previously defined Audit Set.

Previous Report

The ‘Previous Report’ field will automatically default to the current date without a time if no report has been previously produced. Otherwise, it will automatically default to the date and time at which the report was previously produced.

Booking Number

The Booking Number field allows the entry of a specific Booking Number. The report produced will only contain database updates that affect this Booking Number.

From Previous Report

Check the ‘From Previous Report’ checkbox if a report is required for all database changes since the last report.

Date Range

The “Date Range” entry fields are enabled if the “From Previous Report” indicator is checked off.
The report produced will only contain database updates that occurred between the two dates.

Action

The “Action” dropdown list box allows for the selection of which type of database modifications to report.

This selection allows you to limit the report to only show records that were created, or records that were deleted, or records that were updated.

The options available form the dropdown are as follows:

- (All)
- Create
- Update
- Delete

Job Type

The “Job Type” dropdown list box allows for the selection of what type of job performed the database modifications.

This selection allows you to limit the report to only show database modifications that were performed Interactively or by Batch jobs. Selecting ‘Interactive’ will eliminate the thousands of updates that would have been reported in a Batch process.

The options available from the dropdown are as follows:

- Interactive
- Batch
- (All)

Processing Options – Report Type

The ‘Report Type’ processing option indicates what reports to produce.

The ‘Summary’ report is a list of Bookings that have been modified or have had subordinate entities modified.

The “Detail” report is a comprehensive report of the Bookings Management database updates and the Bookings which were affected.

Reporting

The reporting function in the Bookings Management Module allows the user to print a report listing Bookings that are scheduled to occur over a specific date range, combined, if desired, with other search criteria. The ability to select one or more Facilities is also available so that a report can be produced listing all Bookings that will occur at a Facility for a specified time frame. The Bookings listed in the report can be sorted either by Facility or by Booking Number in ascending or descending Date/Time order. Additionally, the report can be printed in detailed or summary format.

The following topic is covered in this section:

Bookings Report

Bookings Report

If the user is not authorised to use the Bookings Management module, an error message will display when the Bookings Report option is selected from the main menu. Otherwise, the user will be required to select a Booking Class prior to the display of the Bookings Report Control form.

Modifications have been made (in Release 3.05) to the Bookings Report to include a balance of fees owing for each booking incorporated in a specific report. In the report printed in Facility order, the balance will be shown for each booking line only, but in the report printed in Booking Number order, a balance will be shown for each booking line and for the overall booking. Provision has been made on the Bookings Report Control form for the entry of a range of balance values; bookings will be included in the report in accordance with the entered range values.

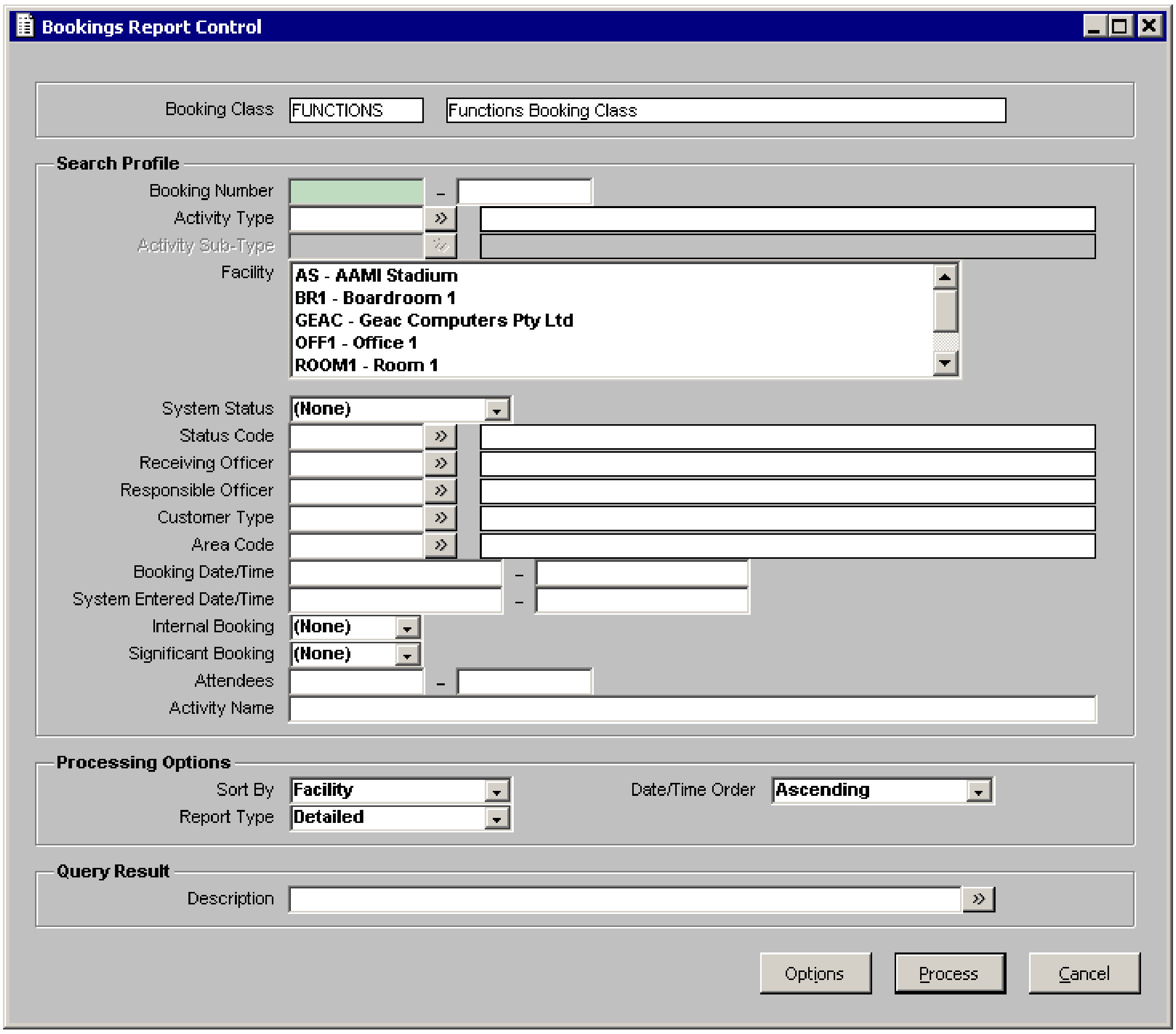
NOTE: Modifications have also been made to the Receipts Datamart in Infomart to provide a link between a Bookings record and its corresponding Receipts record. The actual link is provided via the inclusion of the Bookings_Request_Facts_Key field in the Receipt_Module_Link table in the Receipts Datamart. This link is applicable to Bookings which utilise the 'Cash' Accounting Method only.

Bookings Report Control Form

The Bookings Report Control form allows the user to produce a report on Bookings made with the Council based on specific search criteria.
Alternatively, the report may be based on a Query Result. The resultant report may be sorted by Facility or Booking Number in ascending or descending Date/Time order.

System or User defaults or Named sets may be set up for a particular Class (using the Options button) for frequently used searches. Please note that these defaults only apply to the Booking Class in which they have been established and a message will inform the user when performing a search in a class where no defaults have been set up, e.g.

“Default or Name Set parameters retrieved. But the Parameters are not for the current Booking Class and have not been loaded.”



Bookings Report Control form

Booking Class

The Booking Class fields display the code and description of the selected Booking Class.

Booking Number

The Booking Number fields allow a range of Booking Numbers to be entered for inclusion in the search profile. An error message will display if the 'From' number is larger than the 'To' number.

Activity Type

The Activity Type fields allow an Activity Type to be entered or selected from the Pop Up to be included in the search profile. If no Activity Type is specified, the Activity Sub-Type fields will be dimmed.

Activity Sub-Type

The Activity Sub-Type fields allow an Activity Sub-Type to be entered or selected from the Pop Up to be included in the search profile. If no Activity Type is specified, the Activity Sub-Type fields will be dimmed.

Facility

The Facility field allows one or more Facilities and/or Sub-Facilities to be selected from the displayed list to be included in the search profile.

Note: If the Facility, 'AAMI Stadium', for example, is selected as part of the search profile, then the report will include only those Booking Requests which include that particular Facility. However, if other

Booking Lines using different Facilities have also been booked on these particular Booking Requests, then those Booking Lines will also be included in the Report.

System Status
The System Status field allows a status to be selected from the dropdown to be included in the search profile. The options available include the following:

- (None)
- Tentative
- Awaiting Response
- Confirmed
- Available for Booking

See Status Code.

Status Code

The Status Code fields allow a Status Code to be entered or selected from the Pop Up for inclusion in the search profile. The Codes available will consist of any user-defined Status Codes which have been set up in parameters and are based on the System Status Codes. If a System Status is selected prior to selecting a Status Code, then the Status Code field will be restricted to those Statuses corresponding to its related System Status.

For example:

If a System Status of 'Available for Booking' is selected, then the Status Code field is restricted to those Status Codes which are based on the 'Available for Booking' System Status, e.g. AVAILABLE.

Receiving Officer

The Receiving Officer fields allow a Receiving Officer to be entered or selected from the Pop Up for inclusion in the search profile.

Responsible Officer

The Responsible Officer fields allow a Responsible Officer to be entered or selected from the Pop Up for inclusion in the search profile.

Customer Type

The Customer Type fields allow a Customer Type to be entered or selected from the Pop Up for inclusion in the search profile.

Area Code

The Area Code fields allow an Area Code to be entered or selected from the Pop Up for inclusion in the search profile.

Booking Date/Time
The Booking Date/Time fields allow a Date/Time range to be entered for inclusion in the search profile. An error message will display if the 'From' Date/Time is larger than the 'To' Date/Time.

System Entered Date/Time
The System Entered Date/Time fields allow a Date/Time range to be entered for inclusion in the search profile. An error message will display if the 'From' Date/Time is larger than the 'To' Date/Time.

Internal Booking

The Internal Booking field allows the user to make a selection from the dropdown to indicate the status of the Internal Booking flag on the Booking Request. If (None) is selected then this filed is not included in the search profile. The available options are as follows with the default set to (None):

- (None)
- Off
- On

Significant Booking
The Significant Booking field allows the user to make a selection from the dropdown to indicate the status of the Significant Booking flag on the Booking Request. If (None) is selected then this filed is not included in the search profile. The available options are as follows with the default set to (None):

- (None)
- Off
- On

Attendees
This field allows the user to enter a range of numbers to specify the number of attendees specified for the Booking Request. If entered, this range will be included in the search profile. An error message will display if the 'From' value is larger than the 'To' value.

Activity Name
The Activity Name field allows the user to key in an Activity Name for inclusion in the search profile.

Processing Options – Sort By
The 'Sort By' processing option determines how the report records are sorted. The available sorting methods are by Facility or Booking Number. The default option is 'Facility'.

Processing Options – Date/Time Order
The 'Date/Time Order' processing option determines how the report records are sorted. The available sorting methods are either Ascending or Descending order. The default option is 'Ascending'.

Processing Options – Report Type
This field allows the user to specify the level of detail required in the Report. The options available are as follows with 'Detailed' being the default option:

- Summary
- Detailed

Query Result – Description
This field may be used to specify a previously created query result to identify a group of records. Alternatively, a query result may be selected from the pop up. If a query result is used in the search profile, then all other fields are ignored.

ePathway Bookings

The following topics are included in this section:

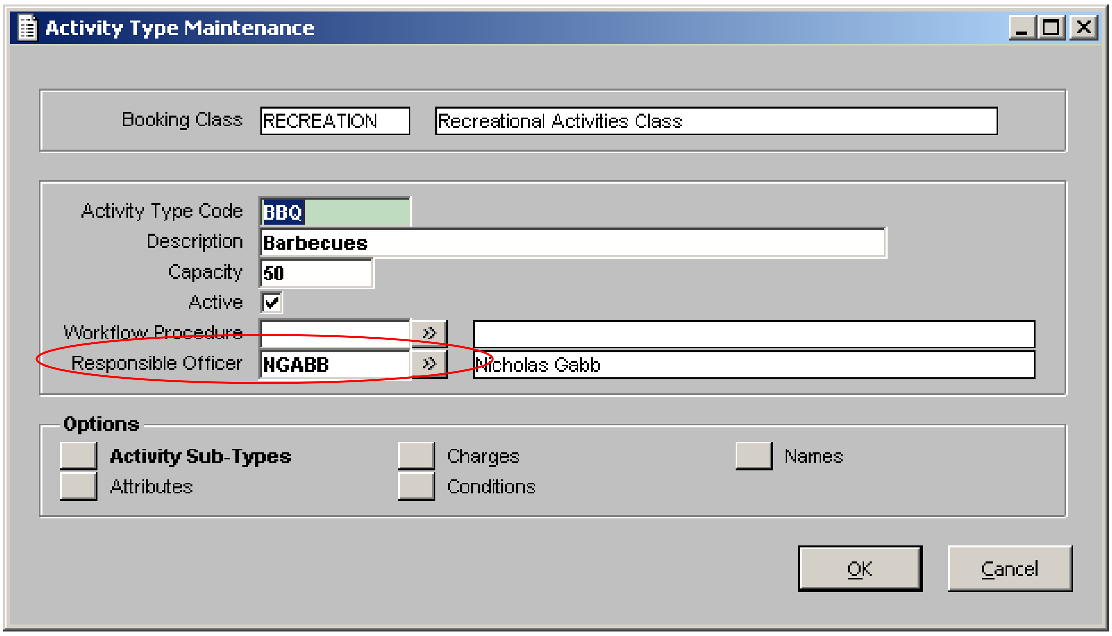
ePathway Bookings Parameters

New functionality has been developed within ePathway to allow its users to make online bookings.

Class Parameters

Activity Type Maintenance

Activity Type Maintenance has been modified to allow council to nominate a Responsible Officer for an Activity Type.

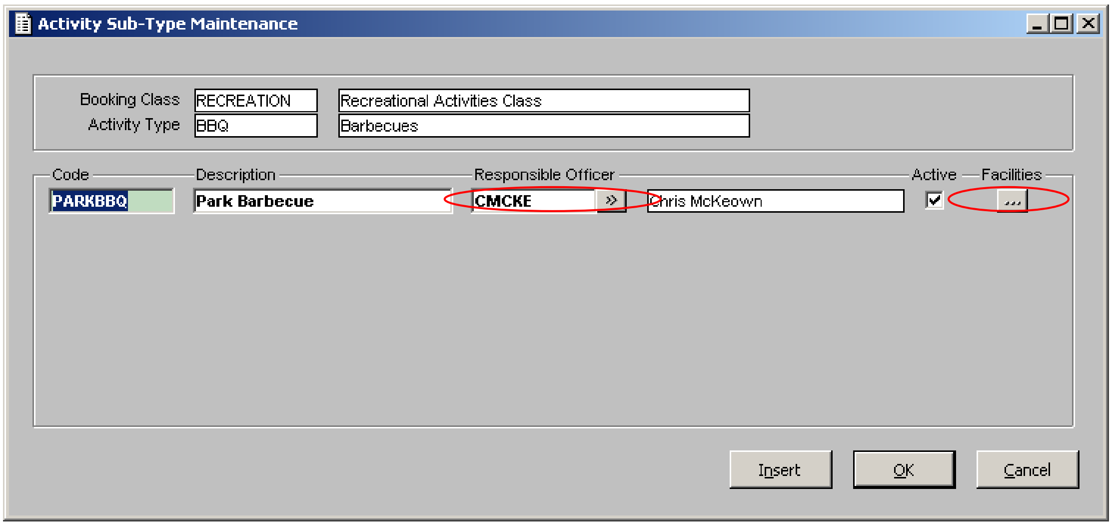


Activity Type Maintenance form showing new Responsible Officer field

This has been introduced so the Responsible Officer associated with the Activity Type is automatically assigned as the Responsible Officer for a Booking Request. The Responsible Officer associated with an Activity Type overrides the default setting of the Responsible Officer, i.e. the current Pathway user.

Activity Sub-Type Maintenance

Activity Sub-Type Maintenance has been modified to allow council to nominate a Responsible Officer for an Activity Sub-Type and nominate Facilities that are ‘most applicable’ to the Activity Sub-Type.



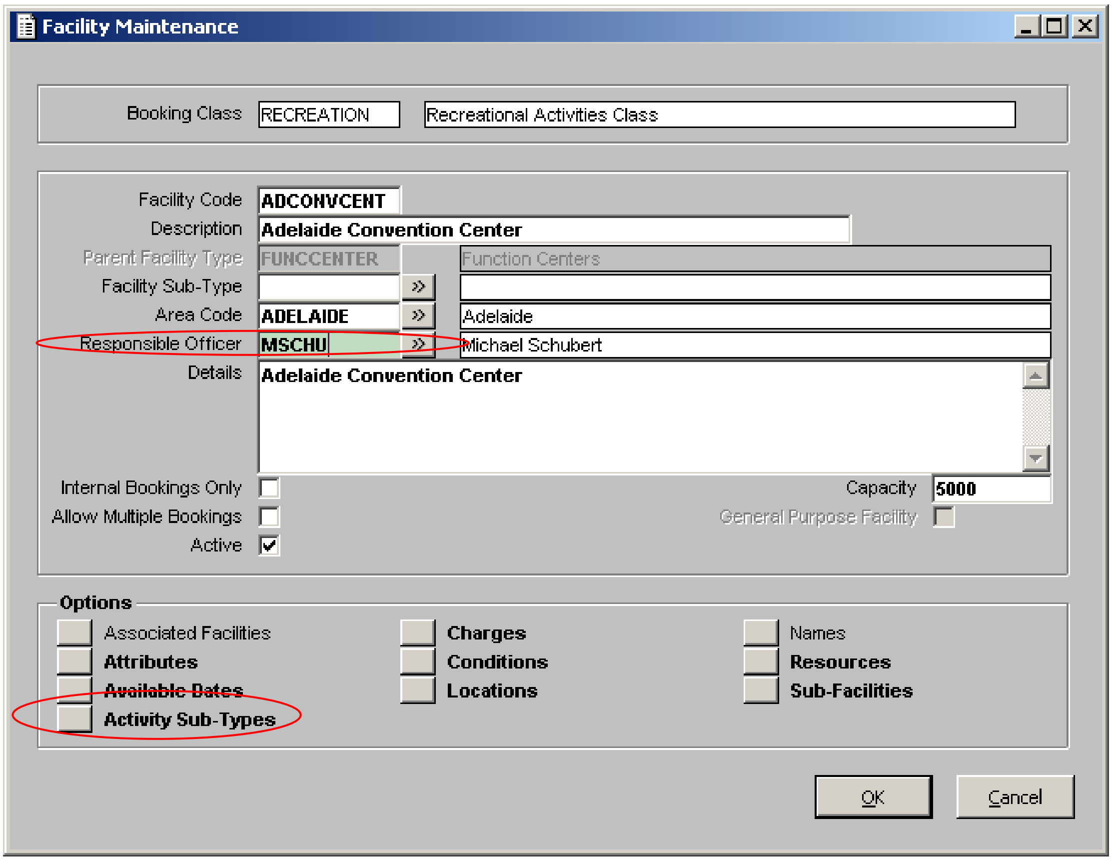
Activity Sub-Type Maintenance form showing new Responsible Officer field and Facilities detail button

The nomination of a Responsible Officer has been introduced so the Responsible Officer associated with the selected Activity Sub-Type is automatically assigned to be the Responsible Officer for the Booking. The Responsible Officer associated with the selected Activity Sub-Type overrides the Responsible Officer associated with the selected Activity Type and the current user making the Booking.

The ‘Facilities’ detail button has been introduced to allow council to nominate those facilities that are most applicable to an Activity Sub-Type.

Facility Maintenance

Facility Maintenance has been modified to allow council to nominate a “Responsible Officer” for a Facility and to nominate Activity Sub-Types that are most applicable to the Facility that is being maintained.



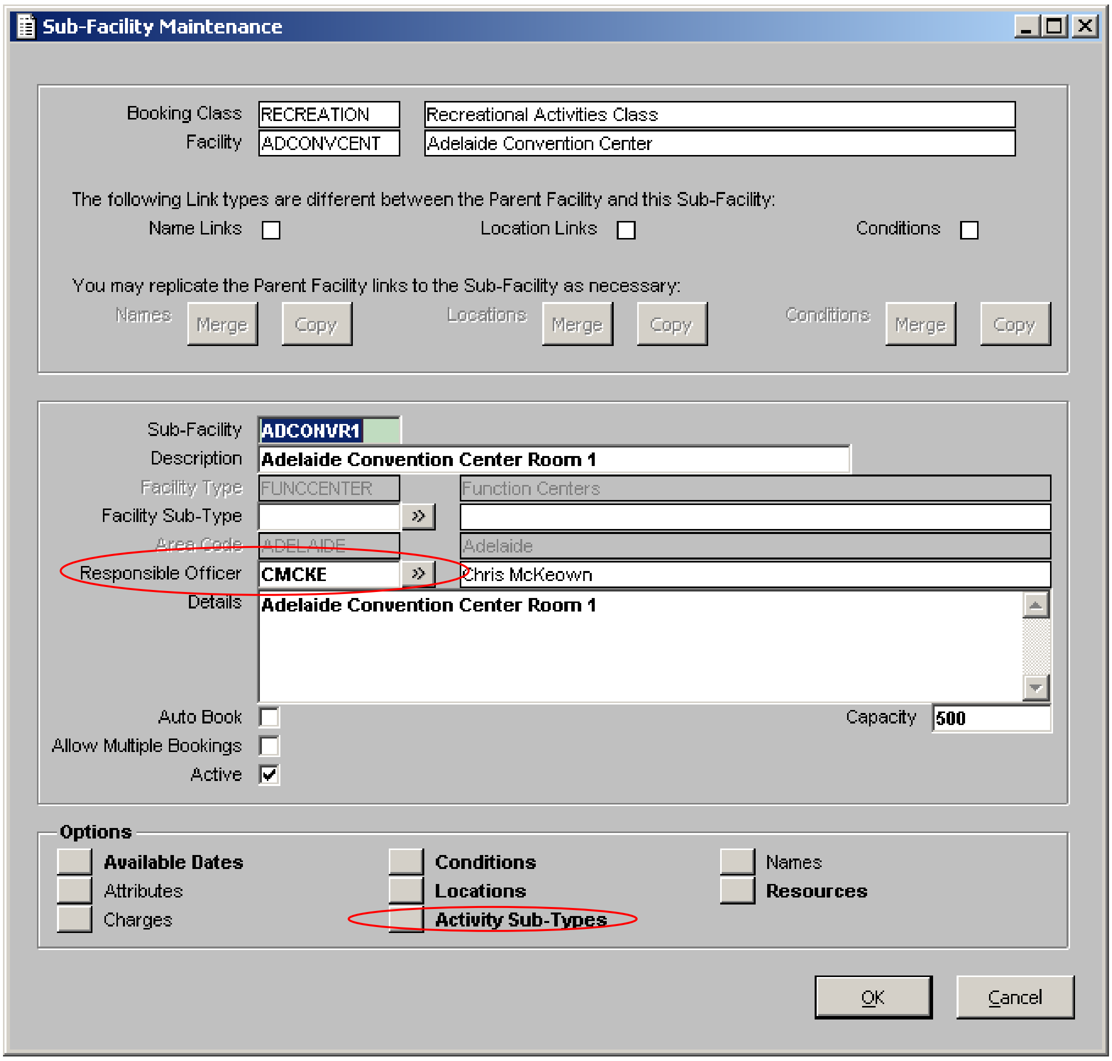
Facility Maintenance form showing new 'Activity Sub-Types' option button and Responsible Officer field

The nomination of a Responsible Officer has been introduced so the Responsible Officer associated with the selected Facility is automatically assigned to be the Responsible Officer for the booking. The Responsible Officer associated with a Facility (on the first valid booking line) overrides any Responsible Officers associated with the selected Activity Type and Activity Sub-Type.

The Activity Sub-Types option button has been introduced to allow council to nominate those Activity Sub-Types that are most applicable to a Facility.

Sub-Facility Maintenance

Sub-Facility Maintenance has been modified to allow council to nominate a Responsible Officer for a Sub-Facility and to nominate Activity Sub-Types that are most applicable to the Facility that is being maintained.



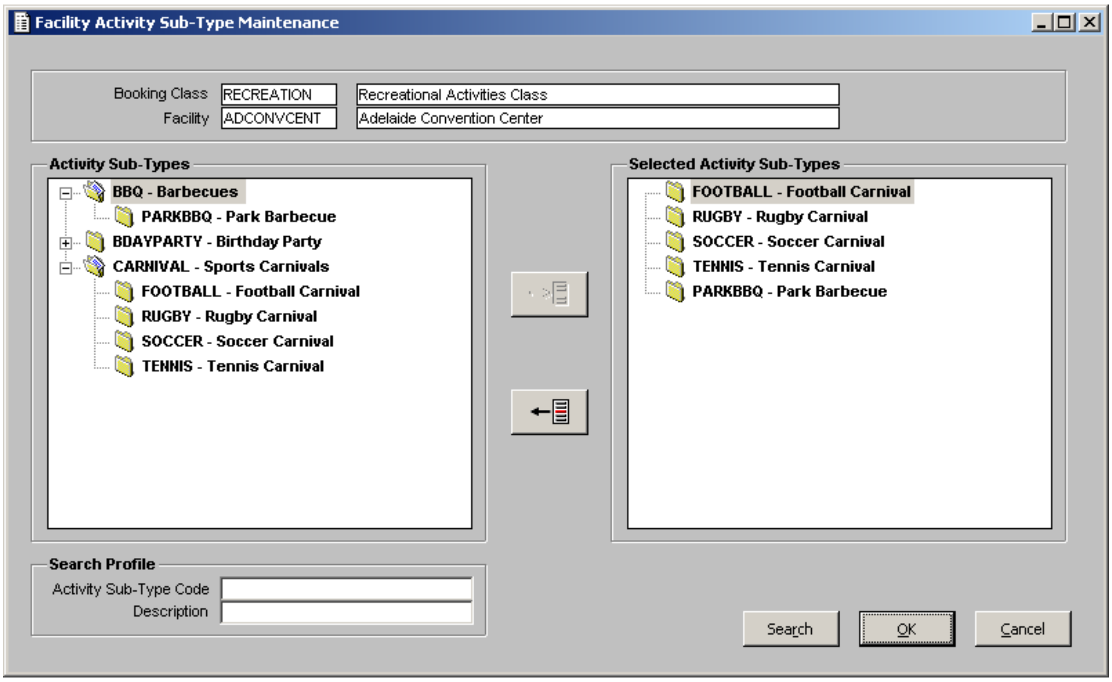
Sub-Facility Maintenance form showing new 'Activity Sub-Types' option button and Responsible Officer field

The nomination of a Responsible Officer has been introduced so the Responsible Officer associated with the selected Sub-Facility is automatically assigned to be the Responsible Officer for the booking. The Responsible Officer associated with a Sub-Facility (on the first valid booking line) overrides any Responsible Officers associated with the selected Activity Type and Activity Sub-Type.

The Activity Sub-Types option button has been introduced to allow council to nominate those Activity Sub-Types that are most applicable to a Sub-Facility.

Facility Activity Sub-Type Maintenance

The Facility Activity Sub-Type Maintenance form has been introduced to allow council to nominate those Activity Sub-Types that are most applicable to a Facility.

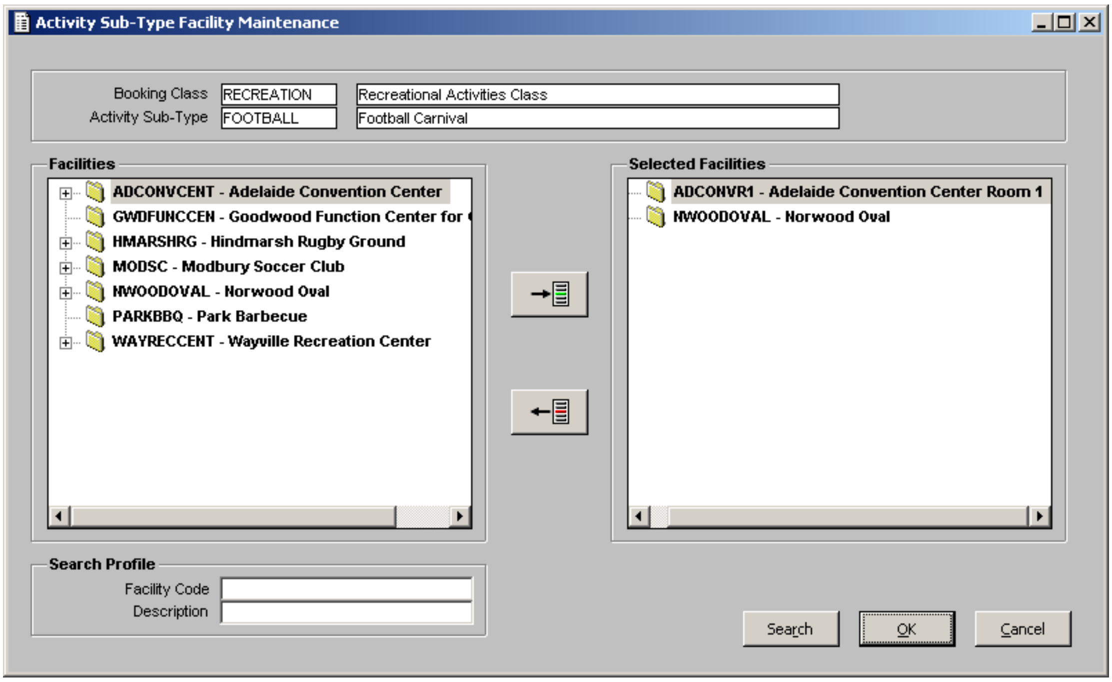


Facility Activity Sub-Type Maintenance form

This has been introduced so that Facilities can be searched for, within Pathway and ePathway, based upon a selected Activity Sub-Type. Also, in Booking Maintenance, the user can decide to display only those Activity Sub-Types that are most applicable to the selected Facility (on the first valid booking line) when selecting an Activity Sub-Type.

Activity Sub-Type Facility Maintenance

The Activity Sub-Type Facility Maintenance form has been introduced to allow council to nominate those facilities that are most applicable to an Activity Sub-Type.

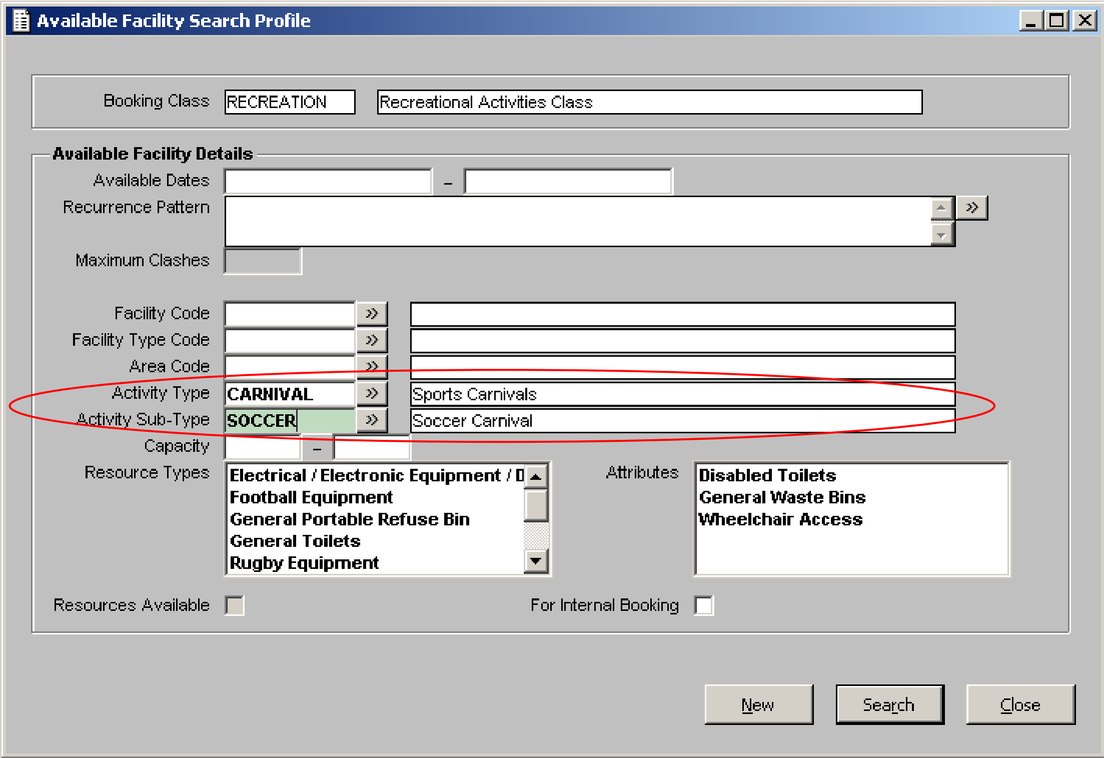


Activity Sub-Type Facility Maintenance form

This has been introduced so that Facilities can be searched for, within Pathway and ePathway, based upon a selected Activity Sub-Type. Also, in Booking Maintenance, the user can decide to display only those Facilities that are most applicable to the selected Activity Sub-Type (if any) when selecting a Facility for a Booking Line.

Available Facility Search Profile

Available Facility Search Profile has been modified to allow council to search for available Facilities based upon Activity Sub-Type search criteria.

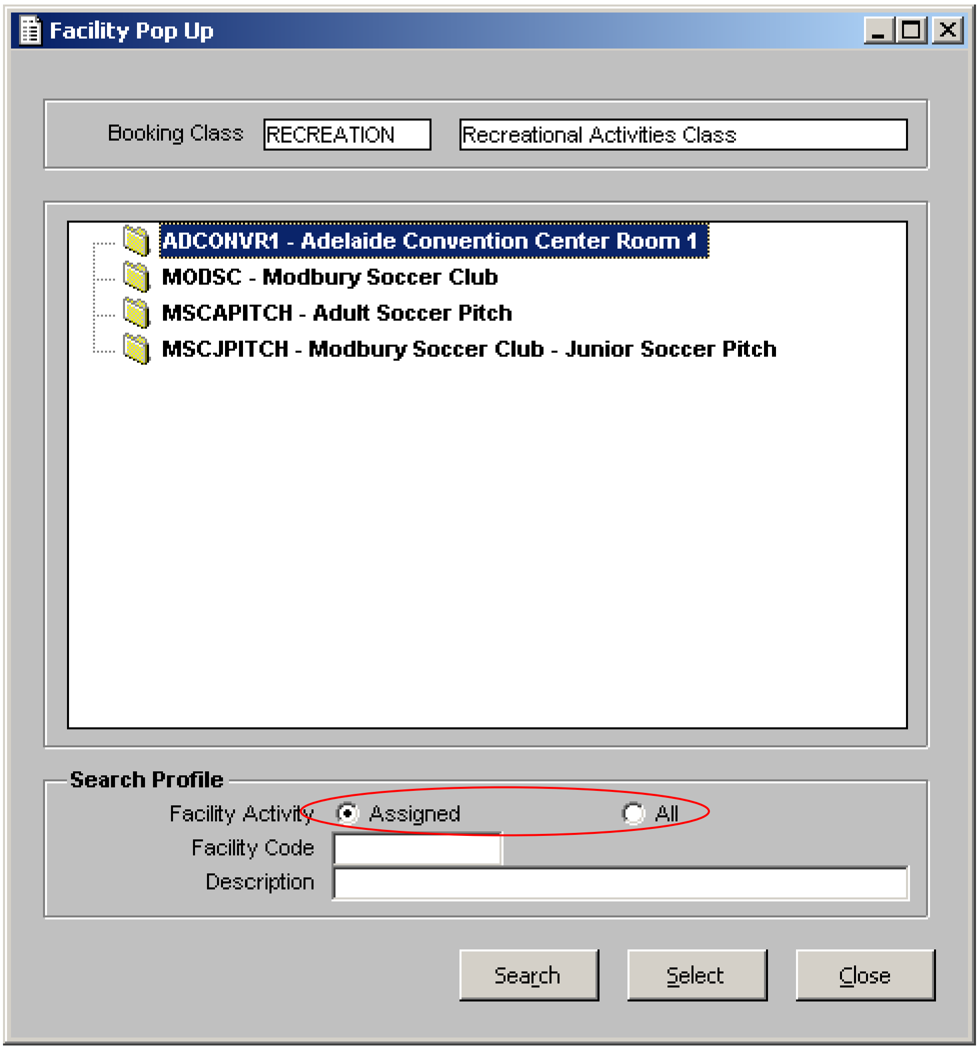


Available Facility Search Profile form showing new Activity Type and Activity Sub-Type fields

This has been introduced due to the new ePathway Bookings module, allowing users to search for Facilities based upon an Activity Sub-Type. Note that the search will only ever return those Facilities that are associated with the selected Activity Sub-Type, which must be specified within the class parameters.

Facility Pop Up

The Facility Pop Up has been modified to allow users, when entering/modifying a Booking, to display the most applicable Facilities based upon the selected Activity Sub-Type. Two radio buttons ('Assigned' and 'All') have been added to allow the user to display the most applicable Facilities or all Facilities within the selected Booking Class.

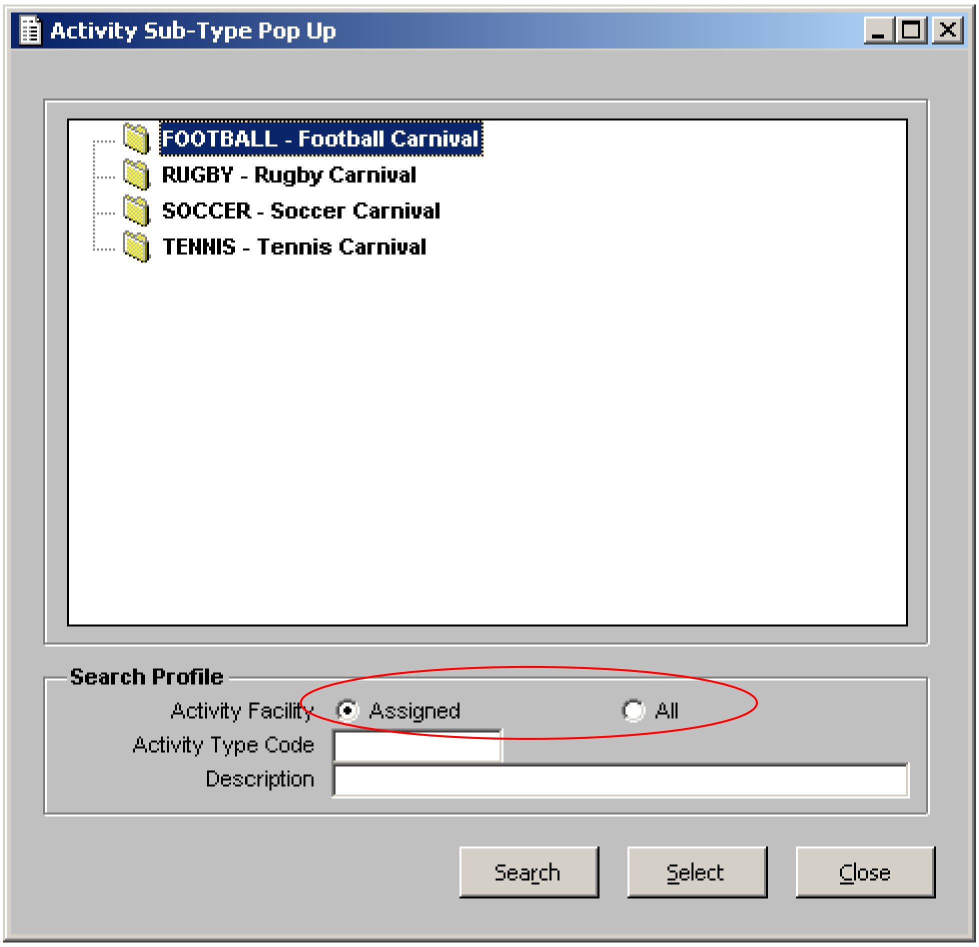


Facility Pop Up form showing new radio buttons

These two radio buttons are only accessible when this form is accessed from the Booking Maintenance form, provided there are Facilities associated with the selected Activity Sub-Type, otherwise these buttons are not accessible.

Activity Sub-Type Pop Up

The Activity Sub-Type Pop Up has been modified to allow users, when entering/modifying a Booking, to display the most applicable Activity Sub-Types based upon the Facility selected in the first valid Booking Line. Two radio buttons (‘Assigned’ and ‘All’) have been added to allow the user to display the most applicable Activity Sub-Types or all Activity Sub-Types for the selected parent Activity Type.

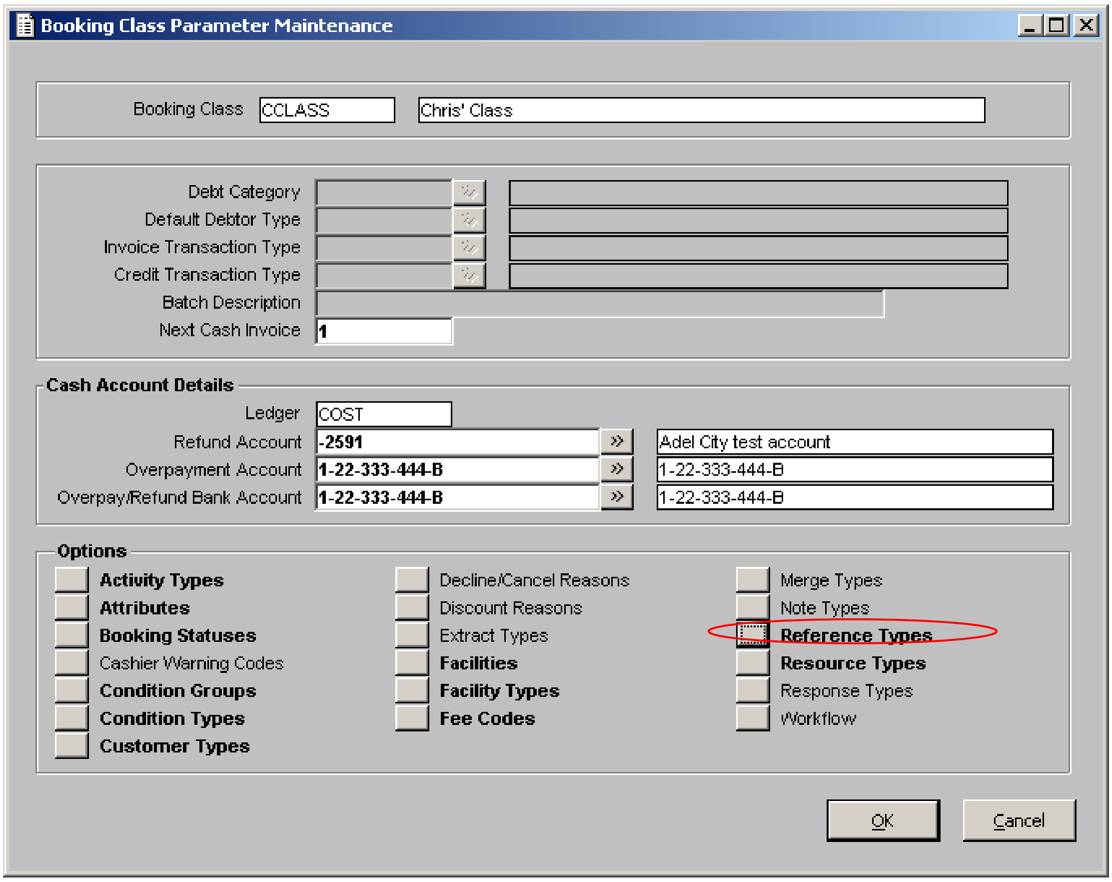


Activity Sub-Type Pop Up form showing new radio buttons

These two radio buttons are only accessible when this form is accessed from the Booking Maintenance form, provided there are Activity Sub-Types (for the selected parent Activity Type) associated with the Facility selected on the first valid Booking Line, otherwise these buttons are not accessible.

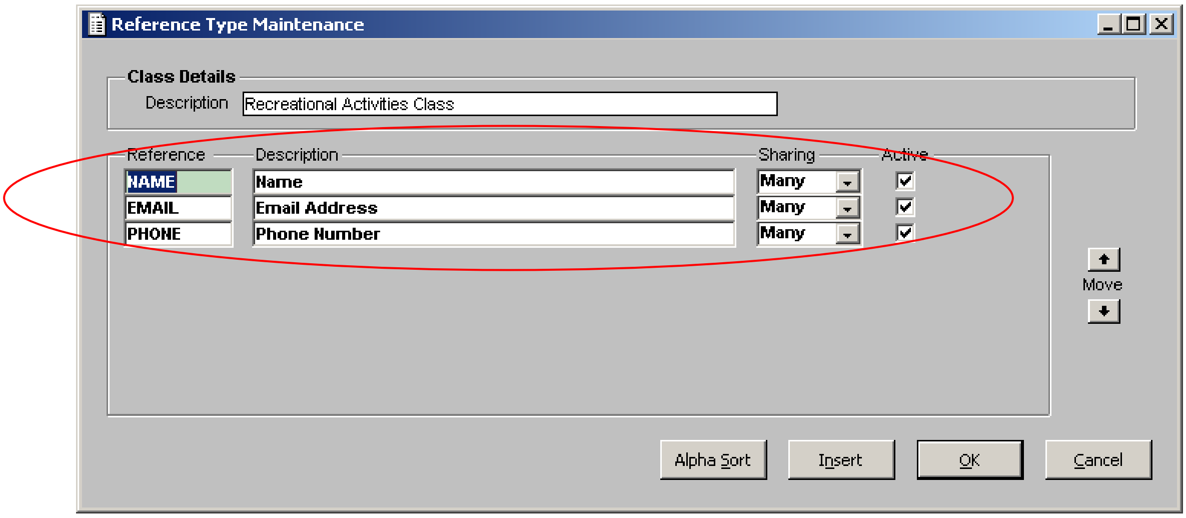
Booking Class Parameter Maintenance

Booking Class Parameter Maintenance has been modified to include a new Option button, “Reference Types”, allowing council to define a set of Reference Types for a Booking Class.



Booking Class Parameter Maintenance form showing new 'Reference Types' option button

At least three References need to be created for a class, representing Name, Email, and Contact Number. These three References are required for ePathway Bookings to allow public ePathway users to be linked to a Booking Request header.

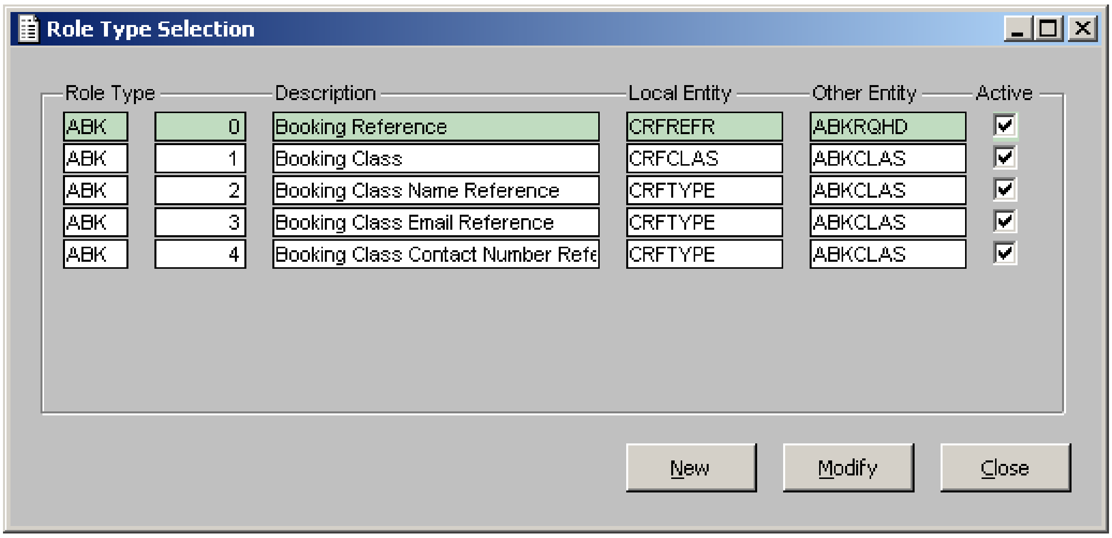


Reference Type Maintenance form showing the three required References for eBookings

Each of these references must have a Sharing relationship of 'Many' allowing a public ePathway user making a booking, to use the same Name, Email Address, and Contact Number for multiple Booking Requests.

Role Types

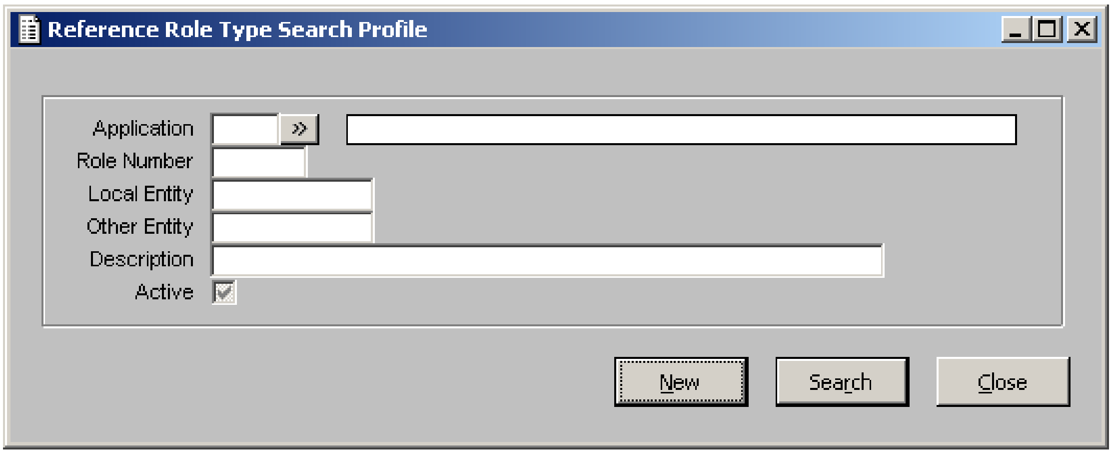
Five new Role Types have been defined within the References module allowing for Name, Email Address, and Contact Number references to be linked to a Booking Request header, when a public ePathway user makes a Booking.



Role Type Selection form showing the five new Role Types

A Booking Reference is created allowing it to be linked to a Booking Request header and a Booking Class reference is created, allowing for individual Booking Classes to have Reference Types defined for it, hence, each class should have a Name, Email, and Contact Number Reference Type defined for it.

These Role Types are created by navigating to the Reference Role Type Search Profile form (System Administration >> References Parameters >> Reference Role Type Filter) and then clicking the 'New' button.

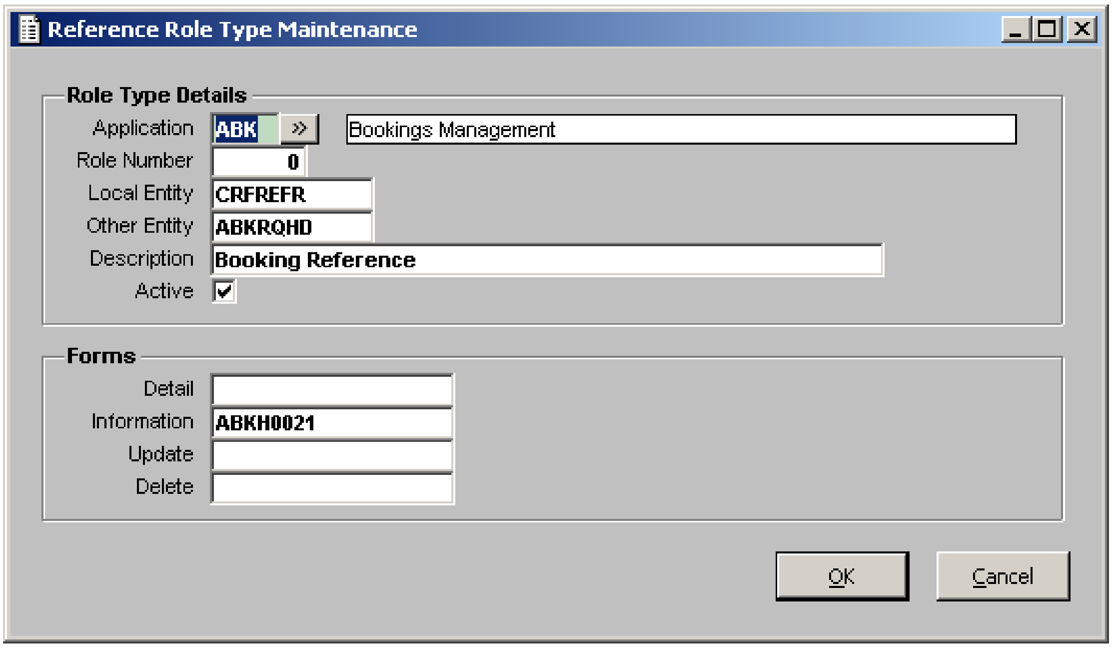


Reference Role Type Search Profile form

This process should be repeated for each ABK role type that is to be created, which is outlined below.

Booking Reference

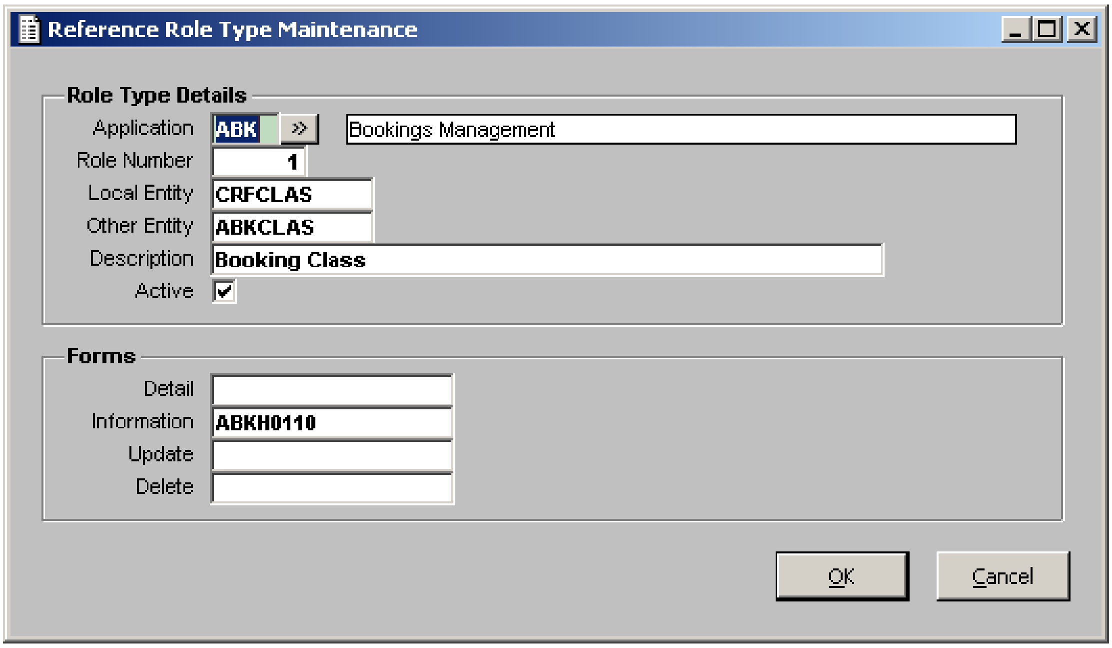
The Booking Reference Role Type has the following parameters specified, shown in the figure below:



Reference Role Type Maintenance form showing Booking Reference role type parameters

Booking Class

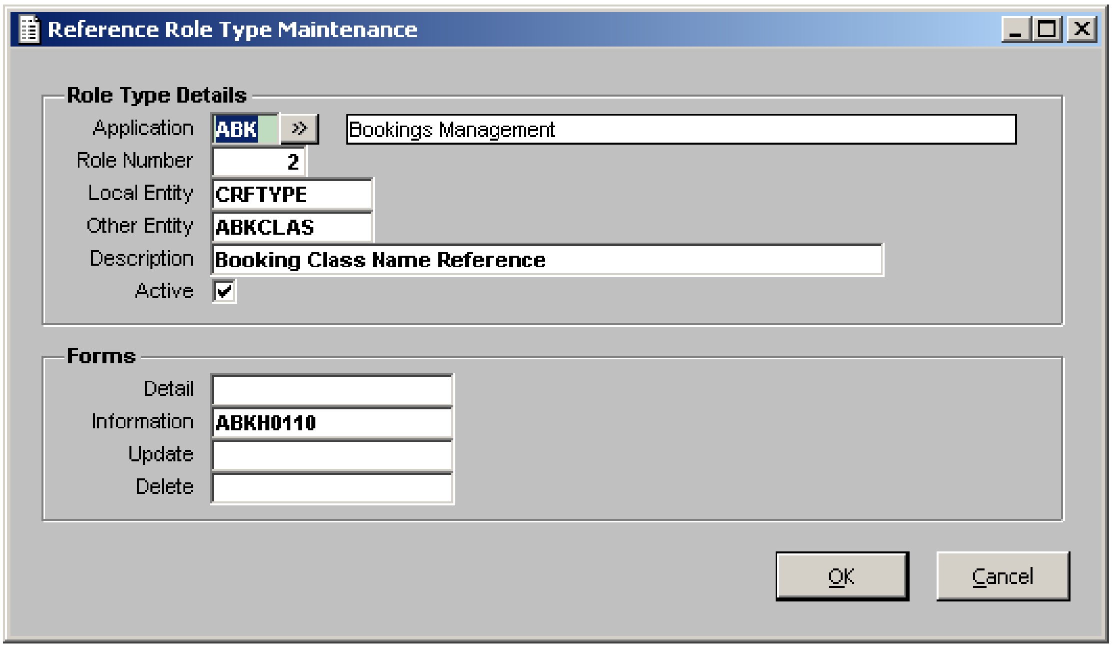
The Booking Class Role Type has the following parameters specified, shown in the figure below:



Reference Role Type Maintenance form showing Booking Class role type parameters

Booking Class Name Reference

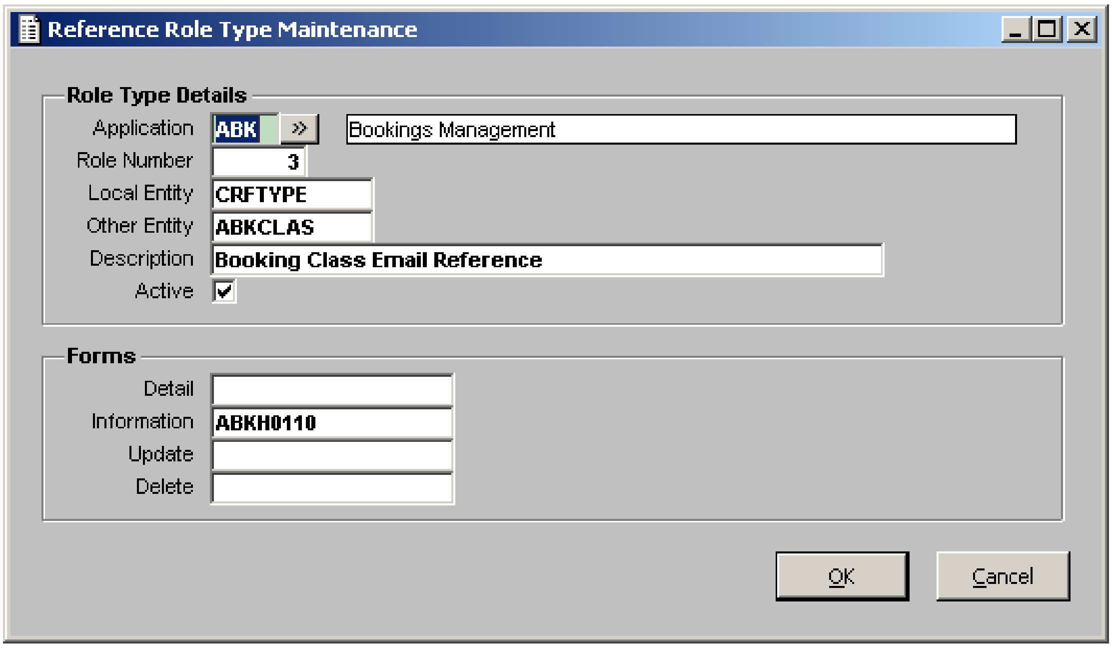
The Booking Class Name Reference Role Type has the following parameters specified, shown in the figure below:



Reference Role Type Maintenance form showing Booking Class Name Reference role type parameters

Booking Class Email Reference

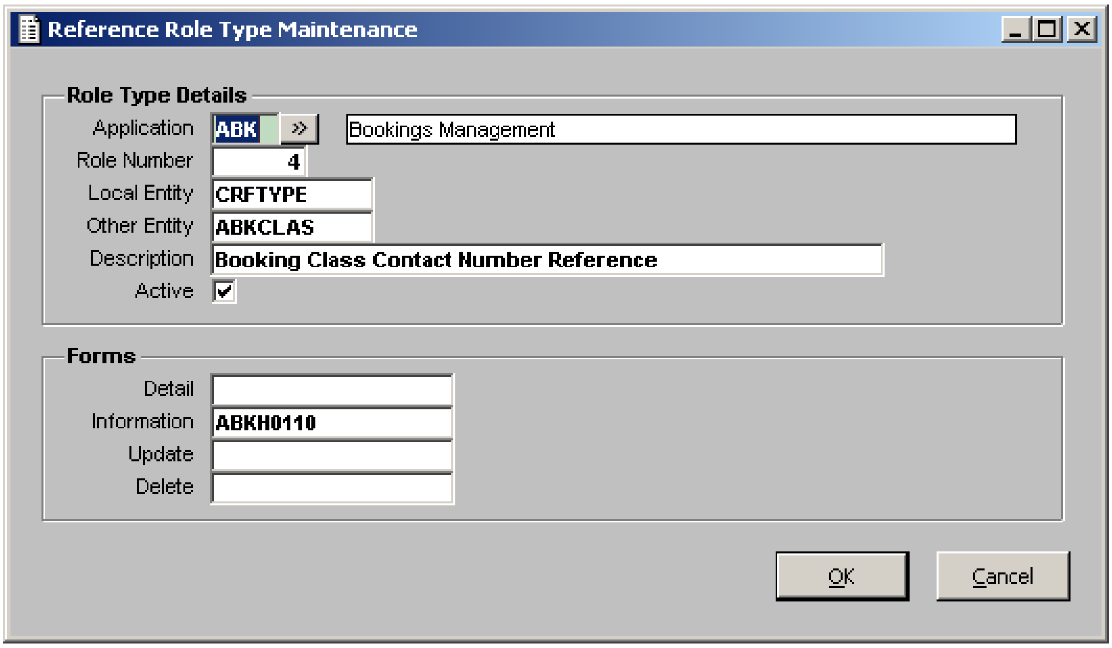
The Booking Class Email Reference Role Type has the following parameters specified, shown in the figure below:



Reference Role Type Maintenance form showing Booking Class Email Reference role type parameters

Booking Class Contact Number Reference

The Booking Class Contact Number Reference Role Type has the following parameters specified, shown in the figure below:



Reference Role Type Maintenance form showing Booking Class Contact Number Reference role type parameters

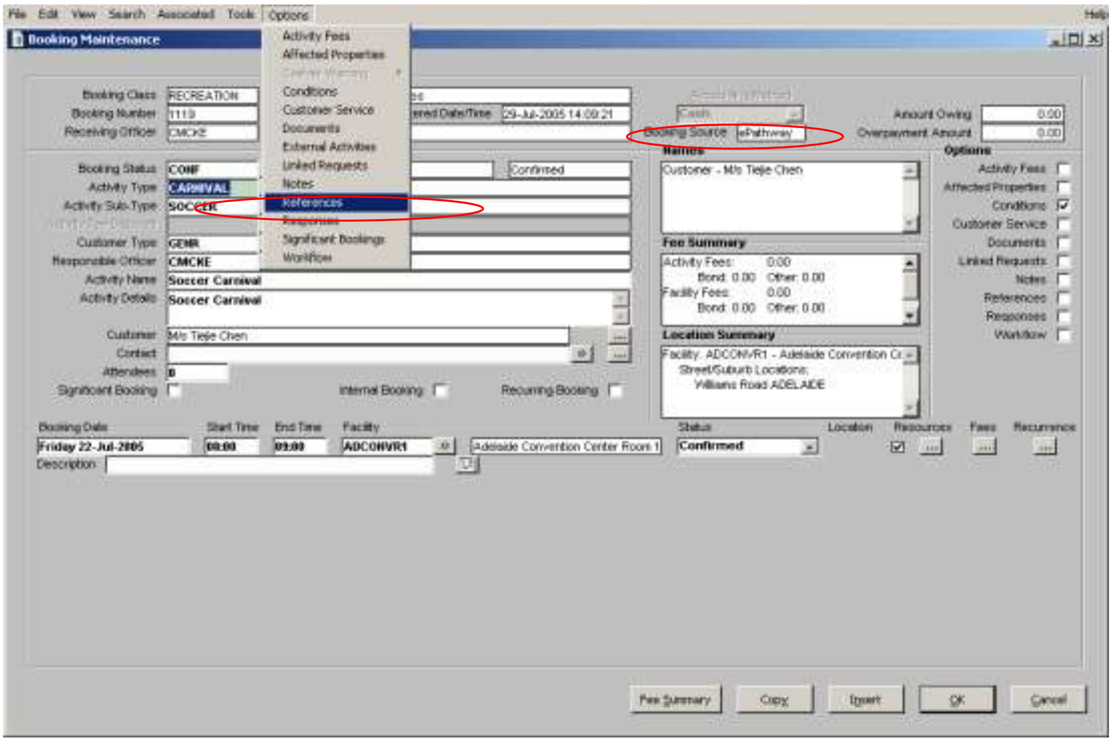
Booking Maintenance

Booking Source

A new field has been added to the Booking Maintenance form, 'Booking Source', which contains either 'ePathway' or 'Pathway', indicating to the user whether this booking was made internally through Pathway or online via ePathway.

References

The Booking Maintenance form has been modified to include the Booking References option. Users are able to manually update references in Pathway, where the References are automatically created in ePathway Bookings, linking public users (by name, email and phone number) to a Booking Request.



Booking Maintenance form showing the new References option and the Booking Source field

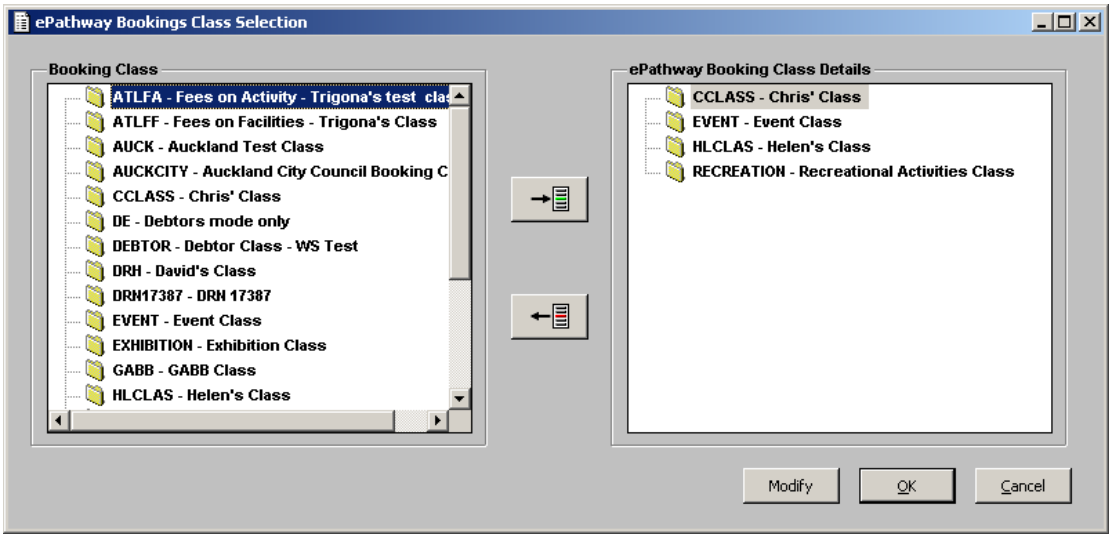
Responsible Officer

The automatic assignment of a Responsible Officer to a Booking Request header has changed from always defaulting to the current Pathway user to one of the following:

- The Responsible Officer associated with the selected Activity Type (over-rides the current Pathway user)
- The Responsible Officer associated with the selected Activity Sub-Type (over-rides the Responsible Officer for the selected Activity Type)
- The Responsible Officer associated with the selected Facility on the first valid booking line (over-rides all)

ePathway Booking Class Selection

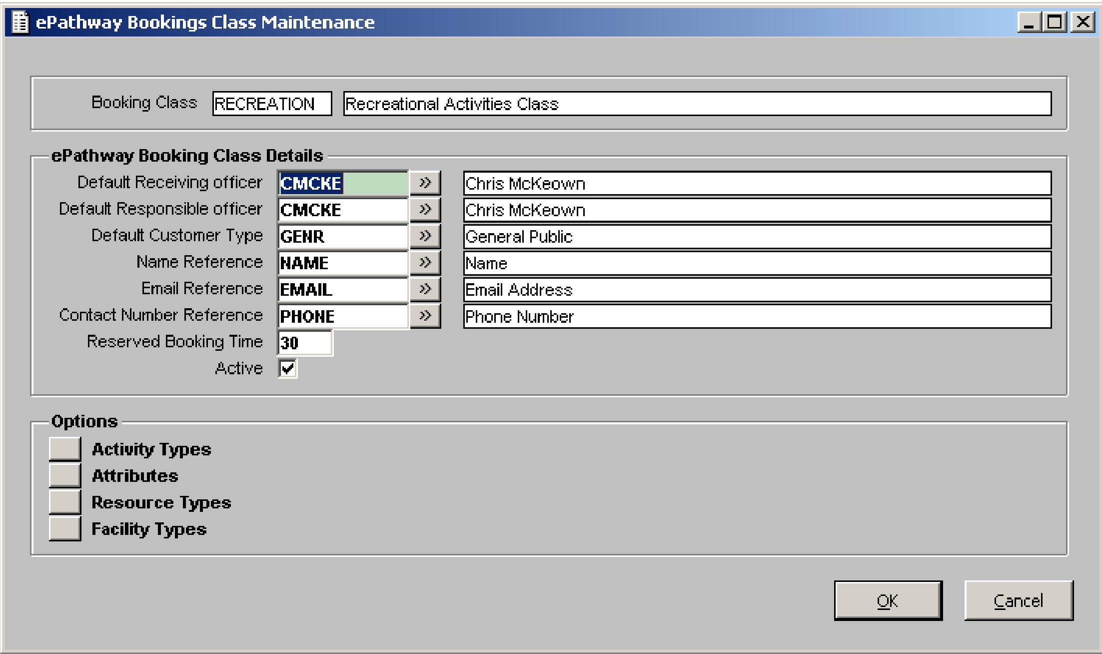
ePathway Booking Class Selection allows council to nominate the Booking Classes to be exported out to ePathway. This allows for specific Facility Types, Activity Types, Attributes, and Resource Types associated with each class to be individually nominated and then exported.



ePathway Bookings Class Selection form

ePathway Bookings Class Maintenance

The ePathway Bookings Class Maintenance form allows council to setup parameters specific to a Bookings Class that are to be exported out to ePathway. The values specified for the Default Receiving Officer, Default Responsible Officer, and Default Customer Type fields, are the default values that the Booking Request header takes on, when a Booking is created for a specific class. Since these fields are mandatory for a booking request, default values must be specified.



ePathway Bookings Class Maintenance form

Name, Email, and Contact Number References must be defined allowing public users of ePathway to be linked to a Booking Request header, enabling council to contact the customer.

The Reserved Booking Time field allows council to nominate the time (in minutes) a customer has in making a booking and then confirming that Booking Request. If the ePathway user exceeds this time, then the Booking Request is automatically cancelled.

Activity Types

The Activity Types option button enables navigation to the ePathway Activity Type Selection form, where council can nominate the Activity Types that are to be exported out to ePathway.

Attributes

The Attributes option button enables navigation to the ePathway Attributes Selection form, where council can nominate the Attributes that are to be exported out to ePathway.

Resource Types

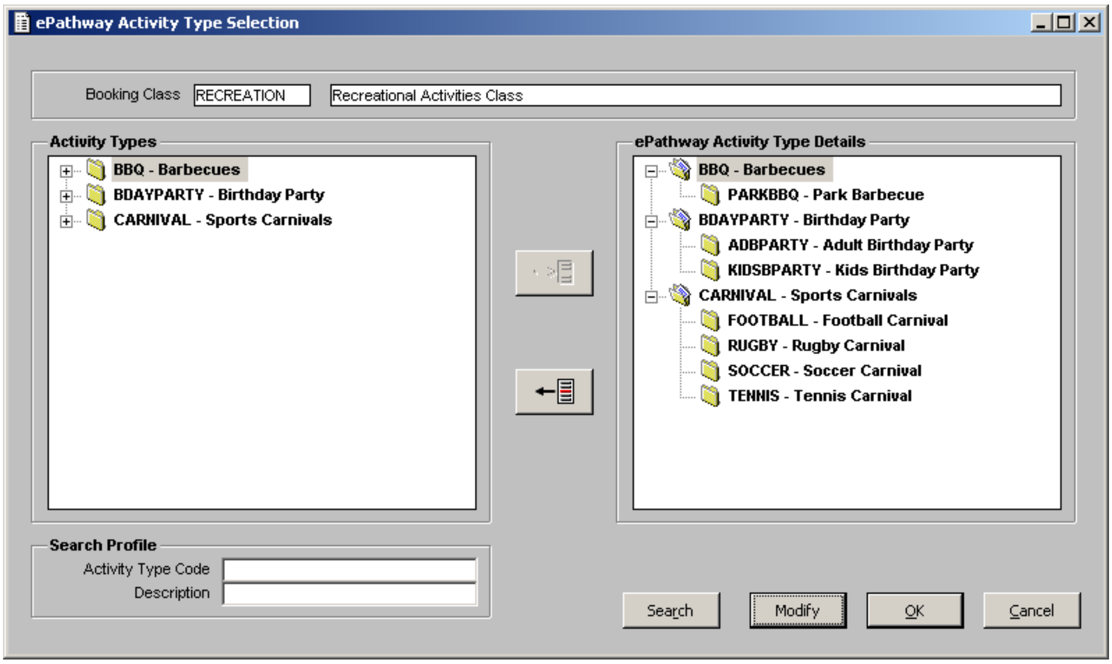
The Resource Types option button enables navigation to the ePathway Resource Type Selection form, where council can nominate the Resource Types that are to be exported out to ePathway.

Facility Types

The Facility Types option button enables navigation to the ePathway Facility Type Selection form, where council can nominate the Facility Types (hence the facilities and their resources) that are to be exported out to ePathway.

ePathway Activity Type Selection

The ePathway Activity Type Selection form allows council to nominate those Activity Types and Activity Sub-Types that are to be exported out to ePathway.

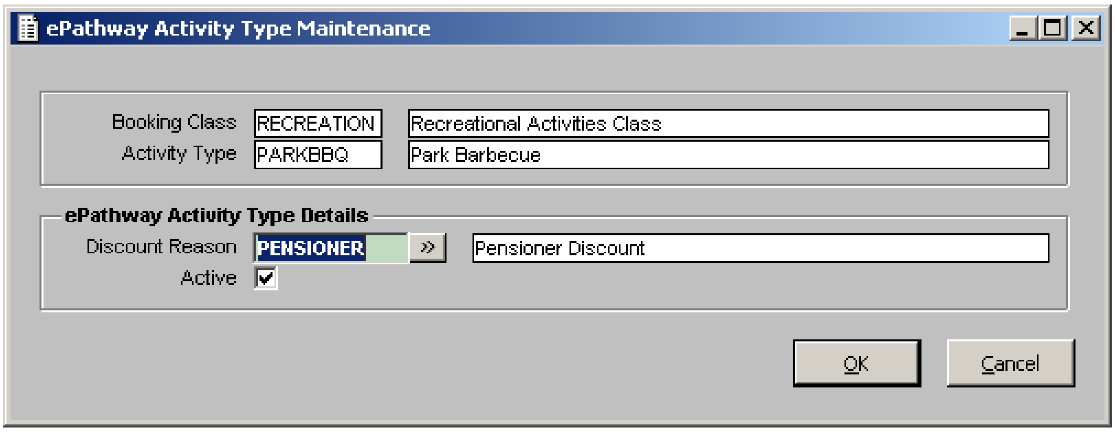


ePathway Activity Type Selection form

Selecting an Activity Type (or Sub-Type) and pressing the ‘Modify’ button invokes the ePathway Activity Type Maintenance form.

ePathway Activity Type Maintenance

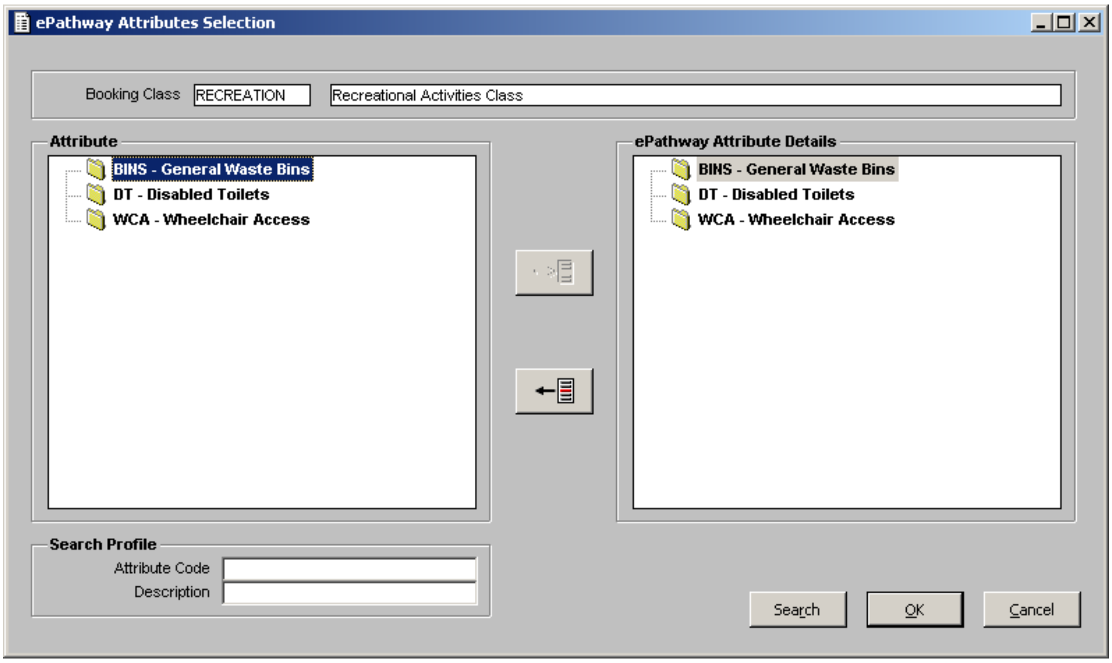
The ePathway Activity Type Maintenance form allows council to specify the ‘Active’ status of the Activity Type or Sub-Type and whether there is a discount given (only applicable for Activity Sub-Types).



ePathway Activity Type Maintenance form

ePathway Attributes Selection

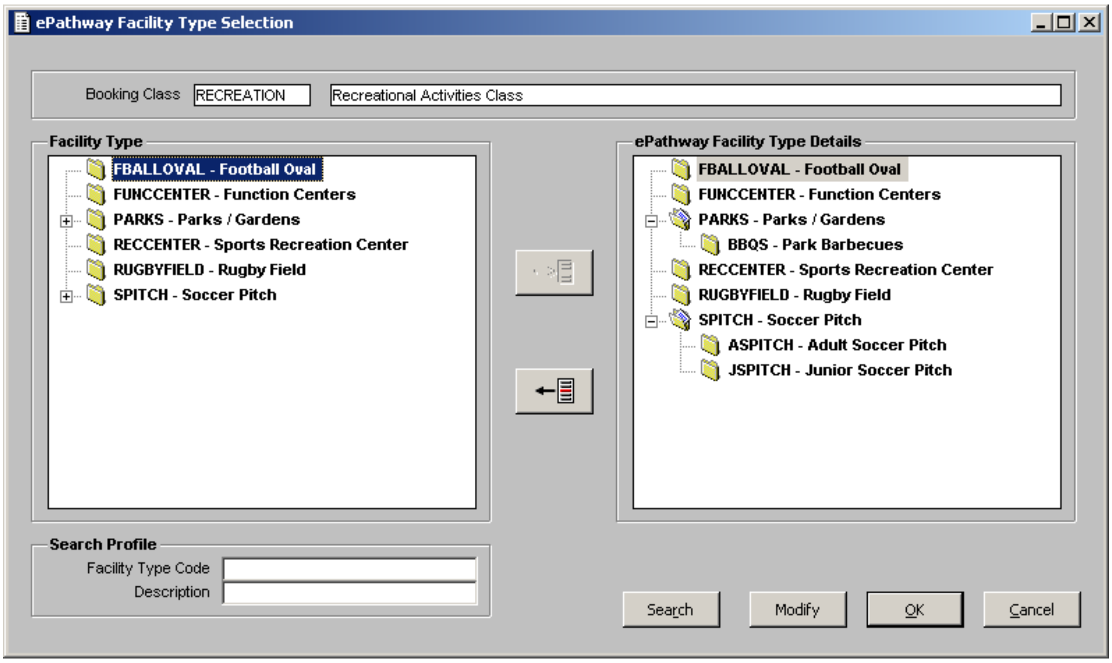
The ePathway Attributes Selection form allows council to select those Attributes, specific to the Booking Class, that are to be exported out to ePathway.



ePathway Attributes Selection form

ePathway Facility Type Selection

The ePathway Facility Type Selection form allows council to nominate those Facility Types that are to be exported out to ePathway.

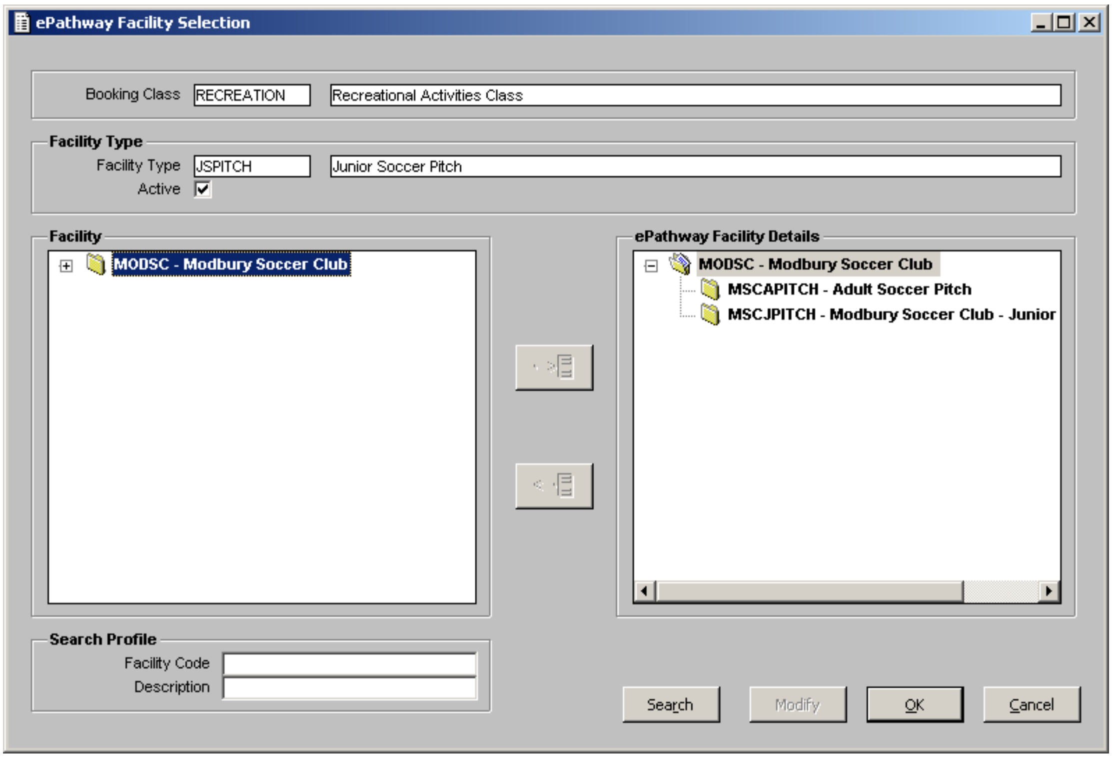


ePathway Facility Type Selection form

Each Facility Type (and Sub-Type) is able to be modified, where the Facilities that are associated with the selected (Sub-)Type can be nominated to be exported out as part of ePathway Bookings.

ePathway Facility Selection

The ePathway Facility Selection form allows council to nominate those Facilities that are to be exported out as part of ePathway Bookings and to set the 'Active' status for the Facility Type being maintained.



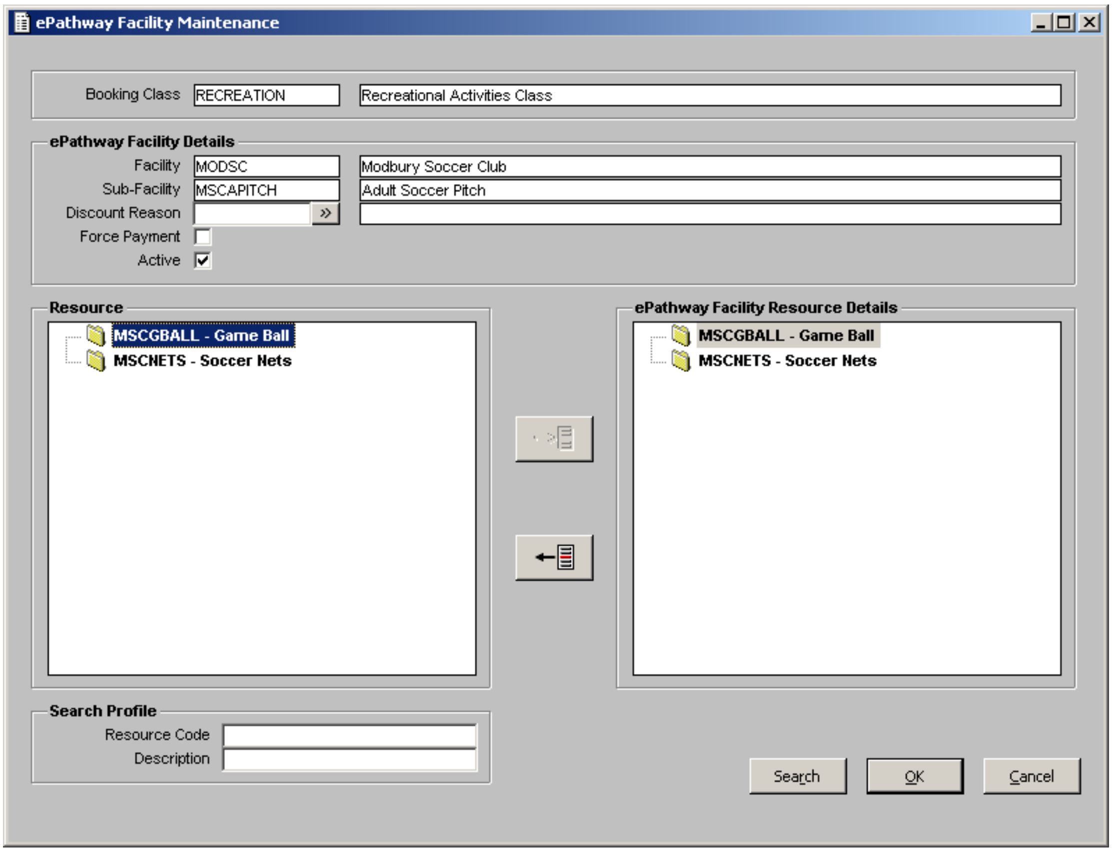
ePathway Facility Selection form

Sub-facilities of the selected Facility Type being maintained, are displayed along with their parent facility. However, if the parent Facility has a different Facility Sub-Type assigned to it from its child Facilities, the parent Facility is also displayed. The parent Facility can be selected (if not already selected), to allow the child Facilities to be selected. However the parent Facility cannot be removed, because the Facility Type that is being modified is not that of the parent Facility.

The resources that are exported out to ePathway, for each Facility, can be nominated via the ePathway Facility Maintenance form, which is accessed by pressing the 'Modify' button within the ePathway Facility Selection form.

ePathway Facility Maintenance

The ePathway Facility Maintenance form allows council to nominate the resources that are to be exported out as part of eBookings for a given facility. This form also allows council to change the 'Active' status on the facility, so instead of removing the Facility and all its selected resources, its status can be changed to in-active and it will not be exported out to ePathway.



ePathway Facility Maintenance form

Discount Reason

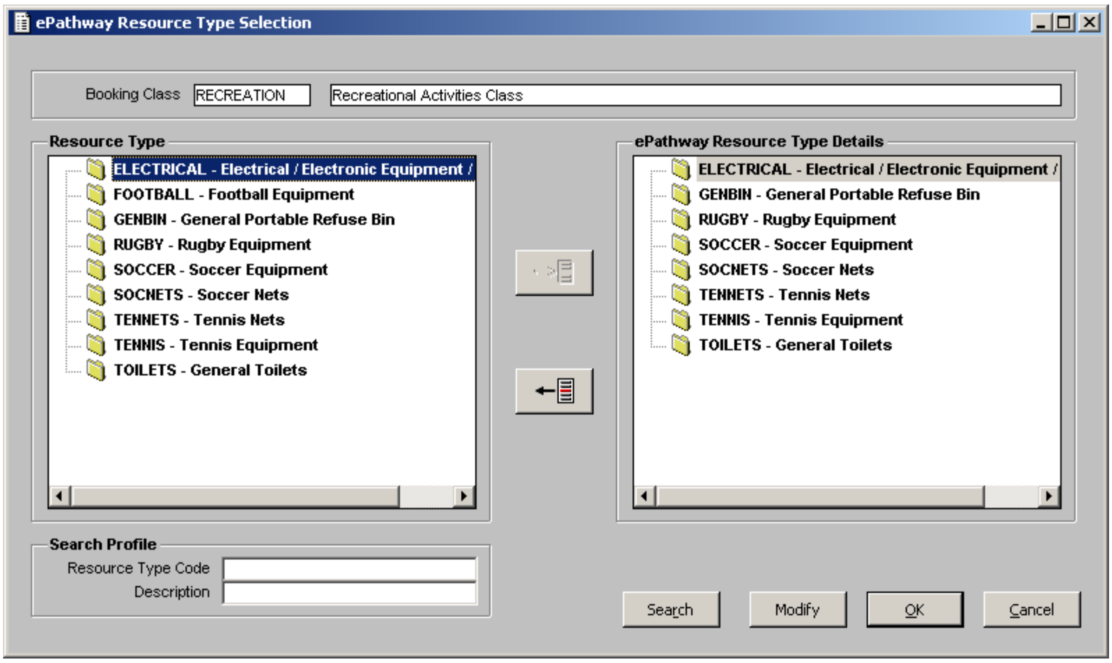
The Discount Reason field allows council to nominate a discount reason that is available to customers when booking a Facility in ePathway.

Force Payment

The Force Payment flag allows council to specify whether a Facility must be paid for up front, by the ePathway Bookings customer, or whether the customer can pay at a later date.

ePathway Resource Type Selection

The ePathway Resource Type Selection form allows council to nominate those Resource Types, associated with a Booking Class, to be exported out to ePathway. Also, only those Resources of the nominated Resource Types, will be available when nominating resources to be exported out to ePathway for selected Facilities.

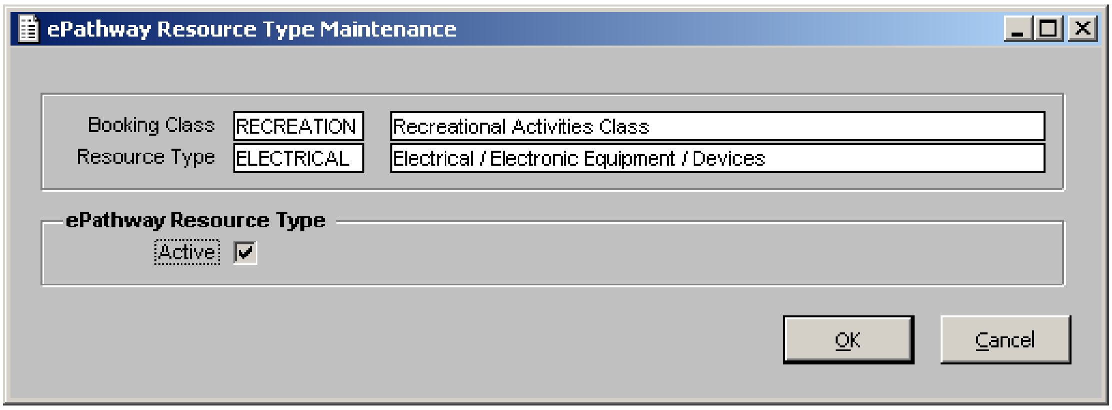


ePathway Resource Type Selection form

Any of the nominated Resource Types can be modified, by selecting the Resource Type and pressing the ‘Modify’ button, to display the ePathway Resource Type Maintenance form.

ePathway Resource Type Maintenance

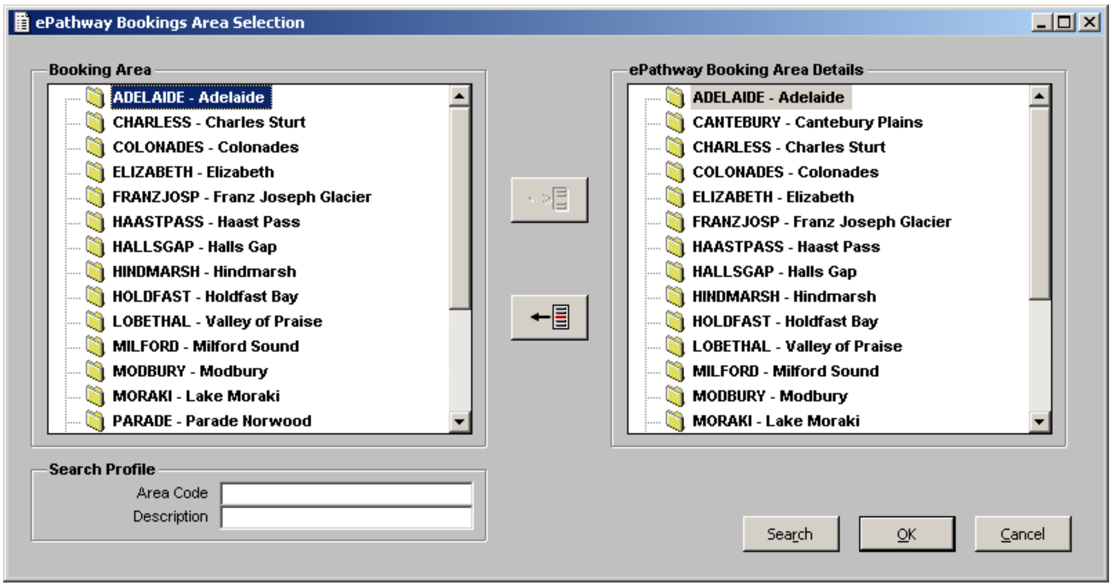
The ePathway Resource Type Maintenance form allows council to set the ‘Active’ status of a Resource Type. Modifying the status of the Resource Type can be done instead of removing the Resource Type as a parameter exported out to ePathway.



ePathway Resource Type Maintenance form

ePathway Bookings Area Selection

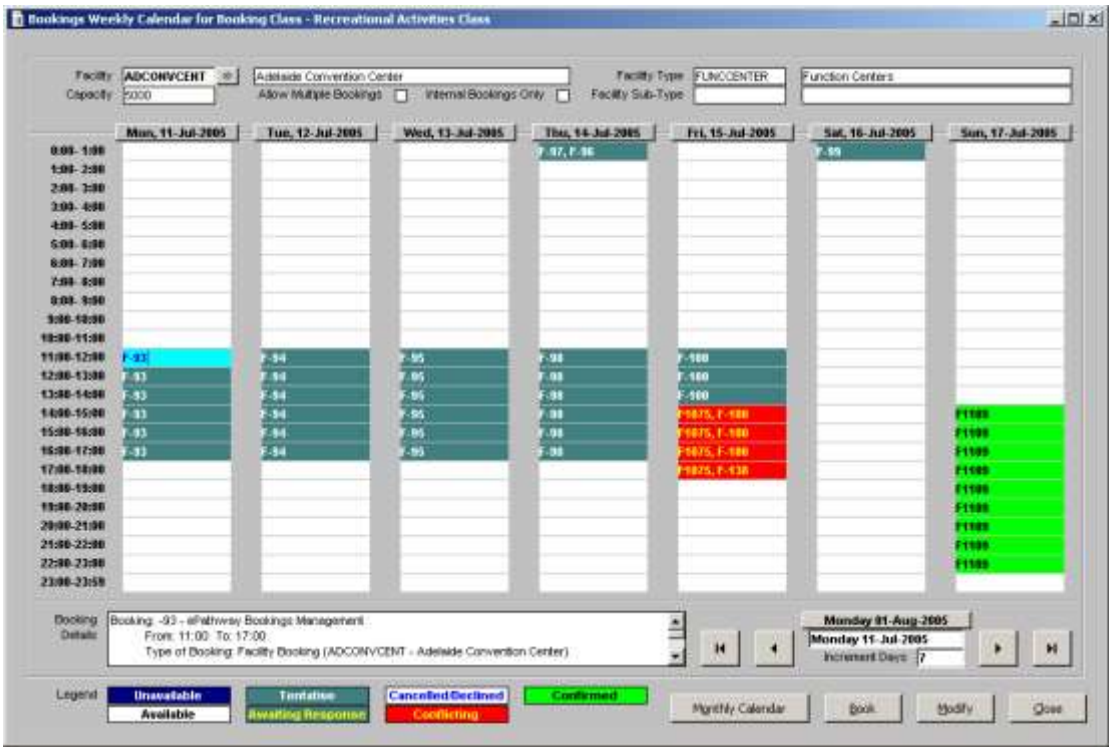
The ePathway Bookings Area Selection form allows council to nominate those areas within which ePathway Bookings users can book Facilities. For a Facility to be able to be booked by a customer via ePathway, its area must be nominated.



ePathway Bookings Area Selection form

Weekly Calendar

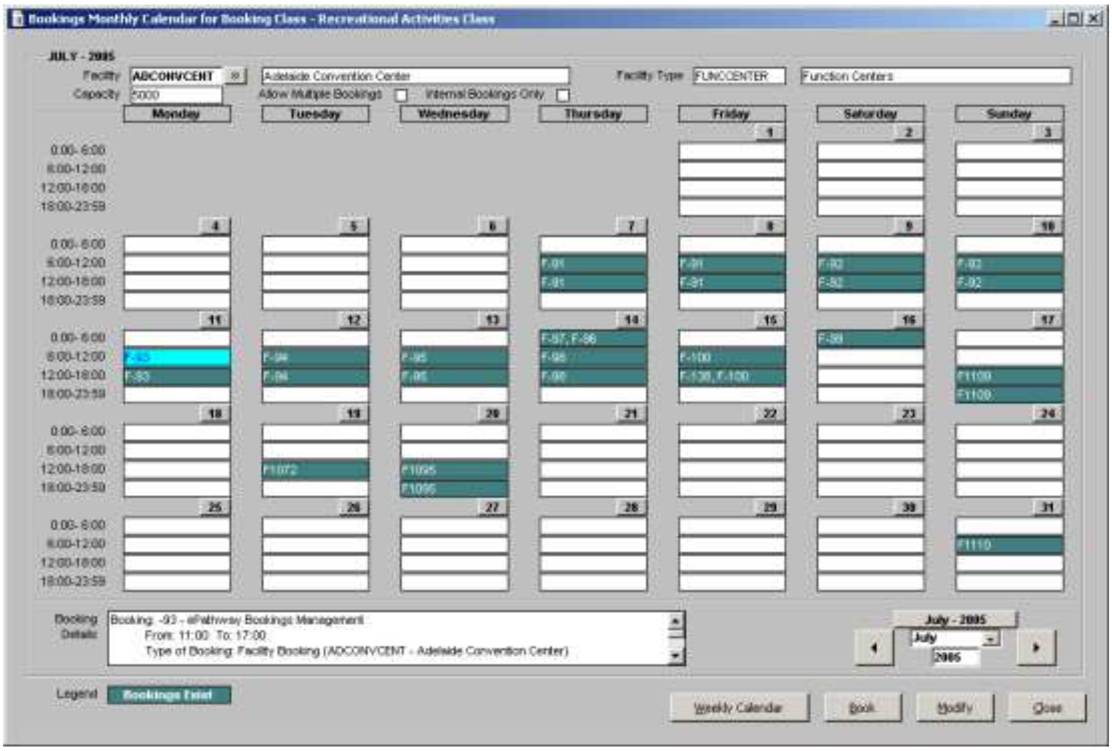
The Weekly Calendar has been modified to display temporary Booking Line details. Temporary Booking Lines are created by ePathway users and exist from the time an ePathway user selects a Facility they wish to book up until the time the Booking is confirmed by the user or the timeout period has expired.


Weekly Calendar form

Temporary Booking Lines are colour coded as 'Tentative' Bookings, and have negative Booking numbers.

Monthly Calendar

The Monthly Calendar has been modified to display temporary Booking Line details. Temporary Booking Lines are created by ePathway users and exist from the time an ePathway user selects a Facility they wish to book up until the time the Booking is confirmed by the user or the timeout period has expired.

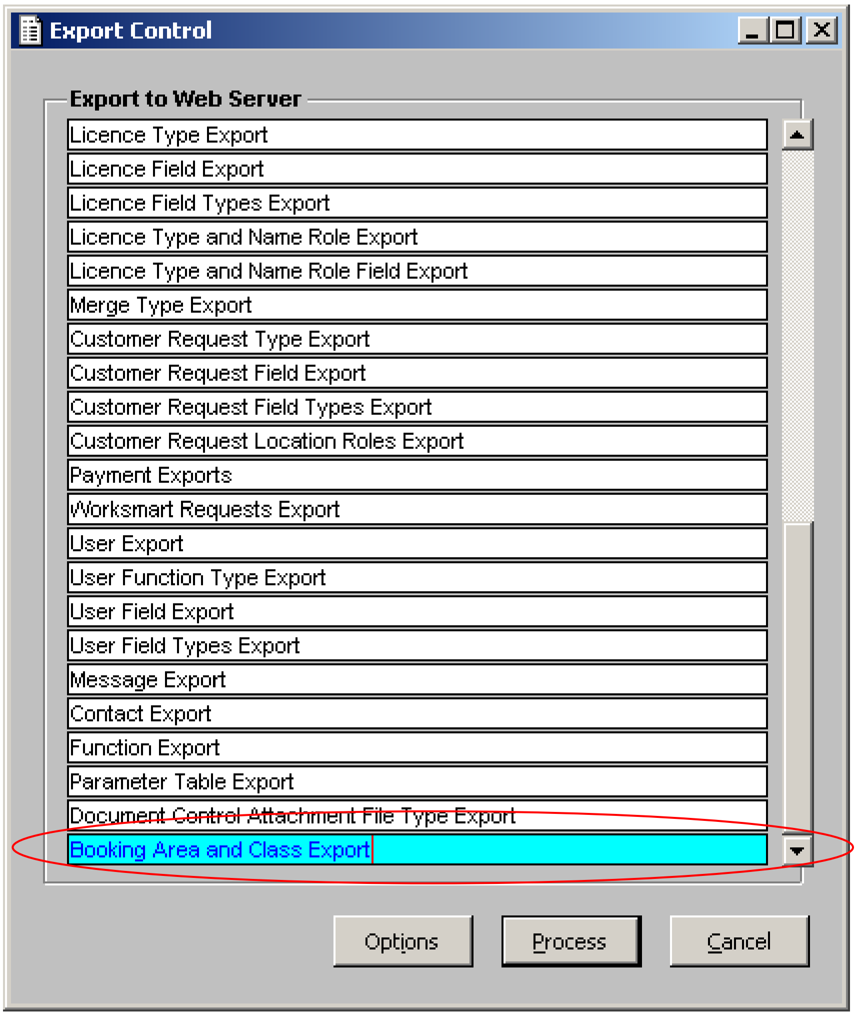


Monthly Calendar form

Temporary Booking Lines are distinguished from other Bookings as they have negative Booking numbers.

Export Control

Export Control has been modified to allow council to export out the ePathway Bookings parameters, setup within the respective ePathway parameter forms, to ePathway. ‘Booking Area and Class Export’ has been added to this form, to allow council to perform the ePathway Bookings export.



Export Control form showing Booking Area and Class Export function

This form is accessed via: System Administration >> ePathway >> System Processing >> Web Server Export.

Create a New Booking in ePathway

There are four major steps in creating a new booking within ePathway. These steps consist of:

1. Selecting a booking class
2. Searching for and selecting a facility
3. Specifying the dates/times to book the facility (and any selected resources)
4. Making the booking payment

Selecting a Booking Class

The first step in making a new booking in ePathway is to select a Booking Class.

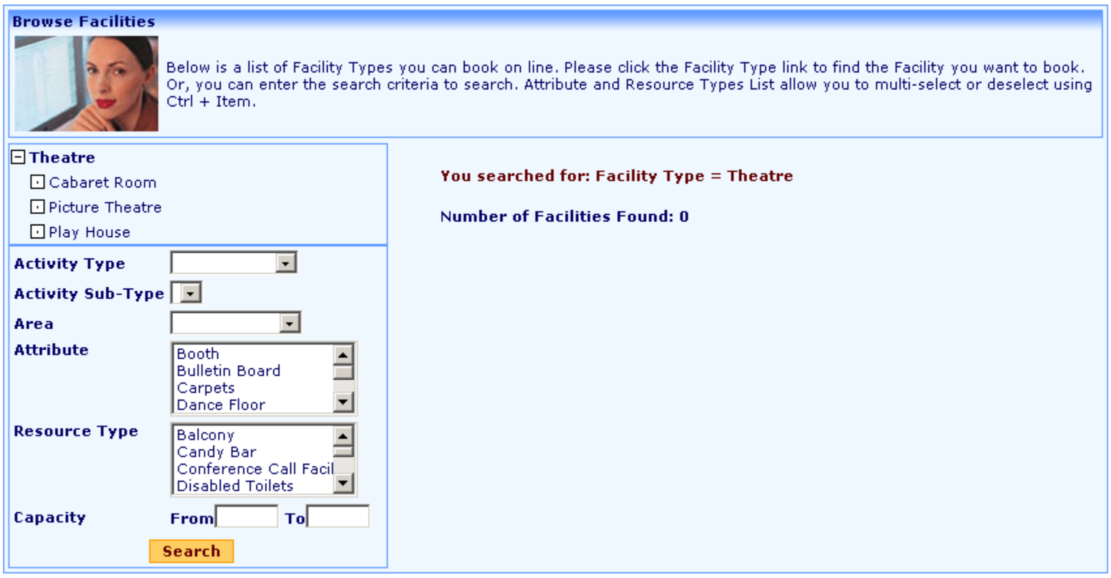
Booking Class Selection page

When a Booking Class is selected, this determines what Facilities, Resources, and Activity Types are available to be selected.

Browse Facilities

The Browse Facilities page allows the ePathway user to search for Facilities based upon different search criteria specified by the user. Search criteria include:

- Facility Type
- Activity Type and Sub-Type
- Area
- Attributes
- Resource Types
- Capacity Ranges



Browse Facilities page

Based upon the search criteria entered (if any) the Facilities that match all requirements specified by the user are displayed on the right side of the page, where only one Facility can be selected by the user to book. Once a Facility has been selected, the user is taken to the Booking Facility Details page.

The type of user that accesses this page and the Booking Class that is selected, determines whether any Facilities are available for selection. If a public user or a registered ePathway user, without a Pathway Debtors account, selects a Booking Class with an accounting method of Pathway Debtors (with no override), then the user will only be able to search for Facilities, as the facilities will not be available for selection (and subsequent booking).

Booking Facility Details

The Booking Facility Details page allows the user making a Booking, to specify the Resources to book and the dates/times at which to book the Facility. It is possible to attempt to book the Facility (and any of its Resources) on three separate dates/times in one step. The dates/times that the Facility is available to be booked are displayed at the bottom of the page along with the conditions associated with the Facility.

Booking Facility Details page

It is a requirement that the user select an Activity Sub-type at this stage if one has not already been selected.

If the Facility or any of the selected Resources are not available for any one of the dates/times requested by the user, then the Booking Request does not proceed. Instead an error message is displayed indicating the dates/times the Facility is not available.

Booking Facility Details

Below are the details for your selected facility, please choose resources associated with this facility, and the date and time you want to book.

Facility

Facility	Kensington Church Hall
Area	City - East
Detail	Smallish Hall suitable for Dances, and balls.
Location	Anzac Highway ADELAIDE
Capacity	100

Please select resources you want to use

☑ Piano3 * **This resource is not available on your chosen date and time.**

Please select an activity sub-type

Activity Type Exhibition

Activity Sub-Type Psychic and Astrological Fair

Booking Date and Time

Date 3/8/2005 (dd/mm/yyyy) **Time** From 10:00 (hh:ss) To 11:00 (hh:ss)

This facility is not available on your chosen date and time.

Date (dd/mm/yyyy) **Time** From (hh:ss) To (hh:ss)

Date (dd/mm/yyyy) **Time** From (hh:ss) To (hh:ss)

Available:

1. Monday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
2. Tuesday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
3. Wednesday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
4. Thursday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
5. Friday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
6. Saturday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
7. Sunday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099

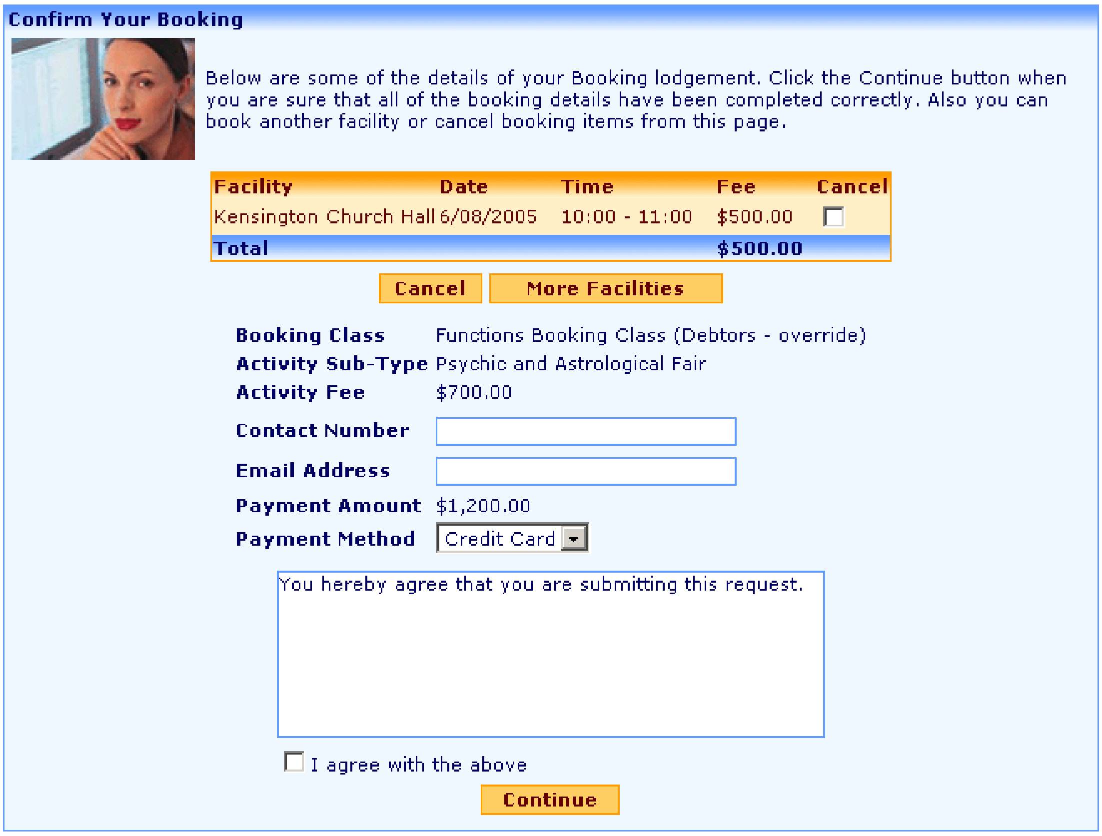
Conditions

1. Heritage 1. Damage to Building. Writing or adhesives on the walls is prohibited
2. Security Provisions. Safety of patrons. No passouts allowed during the evening.

Booking Facility Details page showing date/time clash error messages

Booking Confirmation

The Booking Confirmation page is where the user is able to see a summary of all the Booking dates/times for the Facilities that have been selected.



Booking Confirmation page for a public ePathway user

To confirm the Booking requests made, the user must enter their contact number (email address is only applicable to public ePathway users) and select a method of payment. The payment method options available to the user are determined by:

- Whether or not the 'Force Pay' flag is activated against the Facility within ePathway parameters
- What the Accounting Method is set to for the selected Booking Class
- Whether the user is a public user or a registered ePathway user
- Whether the user is a registered ePathway user with a Pathway Debtors account

If the 'Force Pay' flag is activated on the Facility, then the payment method will always be Credit Card.

The options available for each type of accounting method set for a Booking Class are outlined below.

Booking Class – Cash Accounting Method (no override)

A Booking Class with a Cash Accounting Method (with no override) only allows public and registered users of ePathway to pay by Credit card. Registered users may also raise a Cash Invoice, to pay at a later date.

However, if the facility has its 'Force Pay' flag activated, then the only payment method available is Credit Card.

Payment Methods Available to Users – Cash (no override)			
	Debtor Invoice	**Cash Invoice**	**Credit Card**
Public User	×	×	✓
Registered User	×	✓	✓
Registered User with Debtors Account	×	✓	✓

Booking Class – Cash Accounting Method (debtors override) / Debtors Accounting Method (cash override)

A booking class with a Cash Accounting Method, with a Debtors override, allows public and registered ePathway users (without a Pathway Debtors account) to pay by either Credit Card or raise a Cash Invoice.

Registered ePathway users, with a Debtors account, can pay by Credit Card or raise a Debtors Invoice.

Payment Methods Available to Users – Debtors (Cash override) / Cash (Debtors override)			
	Debtor Invoice	**Cash Invoice**	**Credit Card**
Public User	×	×	✓
Registered User	×	✓	✓
Registered User with Debtors Account	✓	×	✓

Booking Class – Debtors Accounting Method (no override)

A Booking class with a Debtors Accounting Method, with no override, only allows registered ePathway users, with a Pathway Debtors account, to make bookings. Public users or registered ePathway users without a Pathway Debtors account cannot make bookings in such classes.

Note that for these Booking Classes, facilities **Do not** have the ‘Force Pay’ activated by default.

Payment Methods Available to Users – Debtors (no override)			
	Debtor Invoice	**Cash Invoice**	**Credit Card**
Public User	×	×	×
Registered User	×	×	×
Registered User with Debtors Account	✓	×	×

Booking Header Status

After a Booking Request has been confirmed by the ePathway user, the status of the Booking is set accordingly. If the user set the payment method to Credit Card, then the booking has automatically had its status set to “Confirmed” (or its equivalent). Otherwise, if the payment method was set to Invoice, then the booking has its status set to “Awaiting Response” (or its equivalent).

Cancel Booking Request Line

Beside each booking line request is a ‘Cancel’ check box, which allows the user to select specific Booking Lines and to cancel those Booking Line requests, by pressing the ‘Cancel’ button.

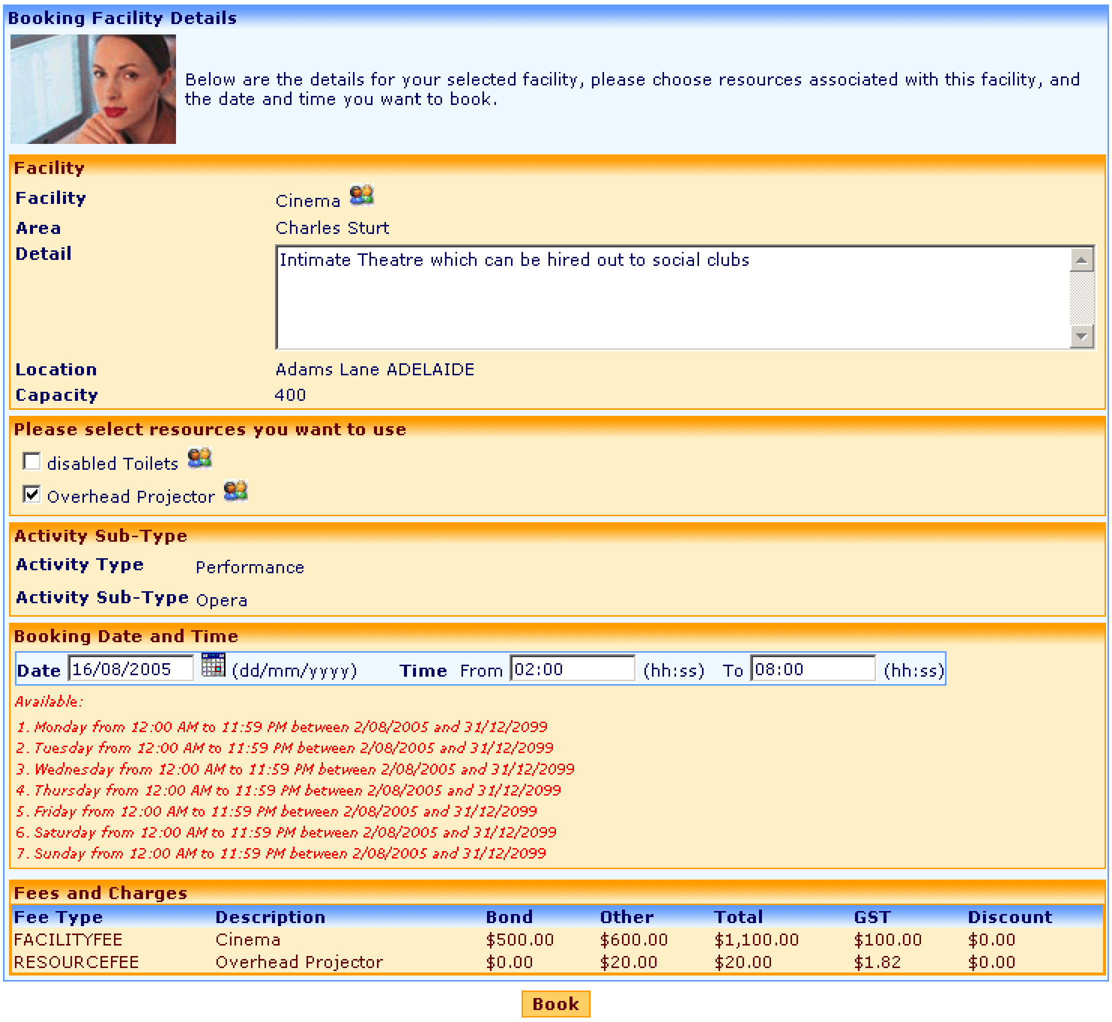
Additional Facility Booking Requests

The user is able to select additional Facilities to be booked by pressing the ‘More Facilities’ button on the Booking Confirmation page. When this button is pressed, the user is brought back to the ‘Browse Facilities’ page. The user is able to search for and select a Facility to book, where the process of selecting Resources and specifying dates/times for the booking, are repeated.

Booking Facility Details – Booking Maintenance

From the Booking Confirmation page, the user is able to select any of the Booking Lines. Once a Booking Line has been selected the Booking Facility Details page is displayed, giving the user a summary of the booking line details. Details include:

- Dates/times facility is to be requested for booking
- Facility and resource fees (if any resources were selected)
- Resources selected or available for selection

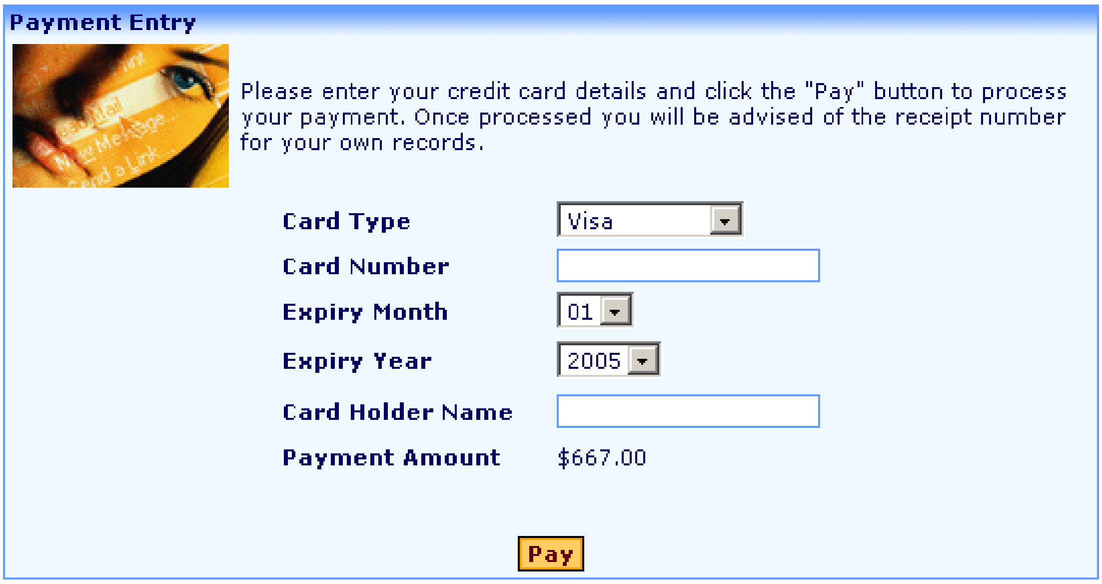


Booking Facility Details page – Booking Maintenance

The user is able to modify the booking details where the dates/times and Resources selected are able to be modified and updated. Availability checks are performed to make sure that the amendments made do not cause clashes with other bookings.

Payment Entry (Credit Card payments only)

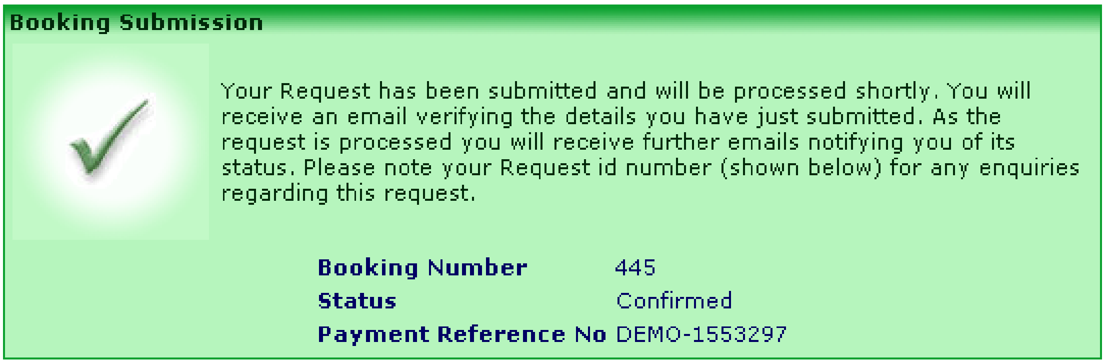
The Payment Entry page is where the total amount to be paid for the Booking Request is displayed for a Credit Card payment. This is where the user selects their card details (type, number, expiration date, and card holder name).



Payment Entry page

Booking Submission

The Booking Submission page contains reference details regarding the Booking and the payment.



Booking Submission page

The Booking Number is a customer's reference to the Booking Request and the Payment Reference Number is a reference to the payment made. The status of the booking is also displayed, indicating whether the booking is confirmed (or its equivalent) or it is awaiting council approval (or its equivalent).

Edit Booking

A user is able to edit the bookings that have not been confirmed by going to the 'Booking' option within the ePathway menu bar and selecting 'Edit Booking'.

ePathway menu bar displaying the 'Edit Booking' option

When this option is selected by a user, the 'Modify an existing Booking' page is displayed to the user, showing all booking records that have not yet been confirmed by the user.

Edit Booking page showing all booking requests that have not been confirmed by an ePathway user

The user is able to navigate to the Booking Confirmation page by selecting a Booking, where the user is able to confirm, or make further modifications to the Booking Request. The user is also able to select Booking Requests (via their respective check boxes) and cancel those requests by pressing the 'Cancel' button.

Public users accessing the Edit Booking function are only able to access those unconfirmed Booking Requests that have been created within the current ePathway session. At no other stage will public users be able to edit any of their Booking Requests. In effect, if the user closes their web-browser, their ePathway session has been terminated.

Booking Enquiry

The booking enquiry function allows ePathway users to search for and display details (i.e. the status) of the booking requests that have been confirmed.

Public ePathway users enquiring about the status of their bookings are required to enter their email address and the booking number of the booking request that was submitted.

Booking Enquiry page for a public ePathway user

Registered ePathway users have more flexibility in the way they are able to enquire about the booking requests they have made. Registered ePathway users are able to search for their Booking Requests by a specific booking number, by lodgement date, or to display all Booking Requests.

Booking Enquiry page for a registered ePathway user when searching for all booking requests

Booking Enquiry page for a registered ePathway user when searching by lodgement date

Booking Enquiry page for a registered ePathway user when searching for a specific booking

When the search for Bookings is complete, a table of all booking requests made by a particular user, is displayed where the user is able to display the details for a Booking Request by clicking on its respective 'Details' link.

Booking Enquiry page showing the table of booking requests made by a user

Only those Booking Requests that were created via ePathway will be displayed for ePathway users, no bookings created within council will be displayed.