# Customer Service User Guide

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***Pathway 3.09 (Thick Client Version)***

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# Overview

The Customer Service System provides the ability to record, maintain and action any requests or complaints that are received by Council. These requests can be received from existing Council customers, customers outside of the Council area or from internal staff. A request is considered to be a request for information only, a request for action, a complaint about Council services or a complaint about action taken on a previous request.

The Customer Service System is integrated to Name and Address, Property, Street/Suburb, Infringements, Applications, Licensing, Animals, Rates, Registers and Work Flow.

# Parameters

This section details the setting up of parameters to be used within the Customer Service Application.

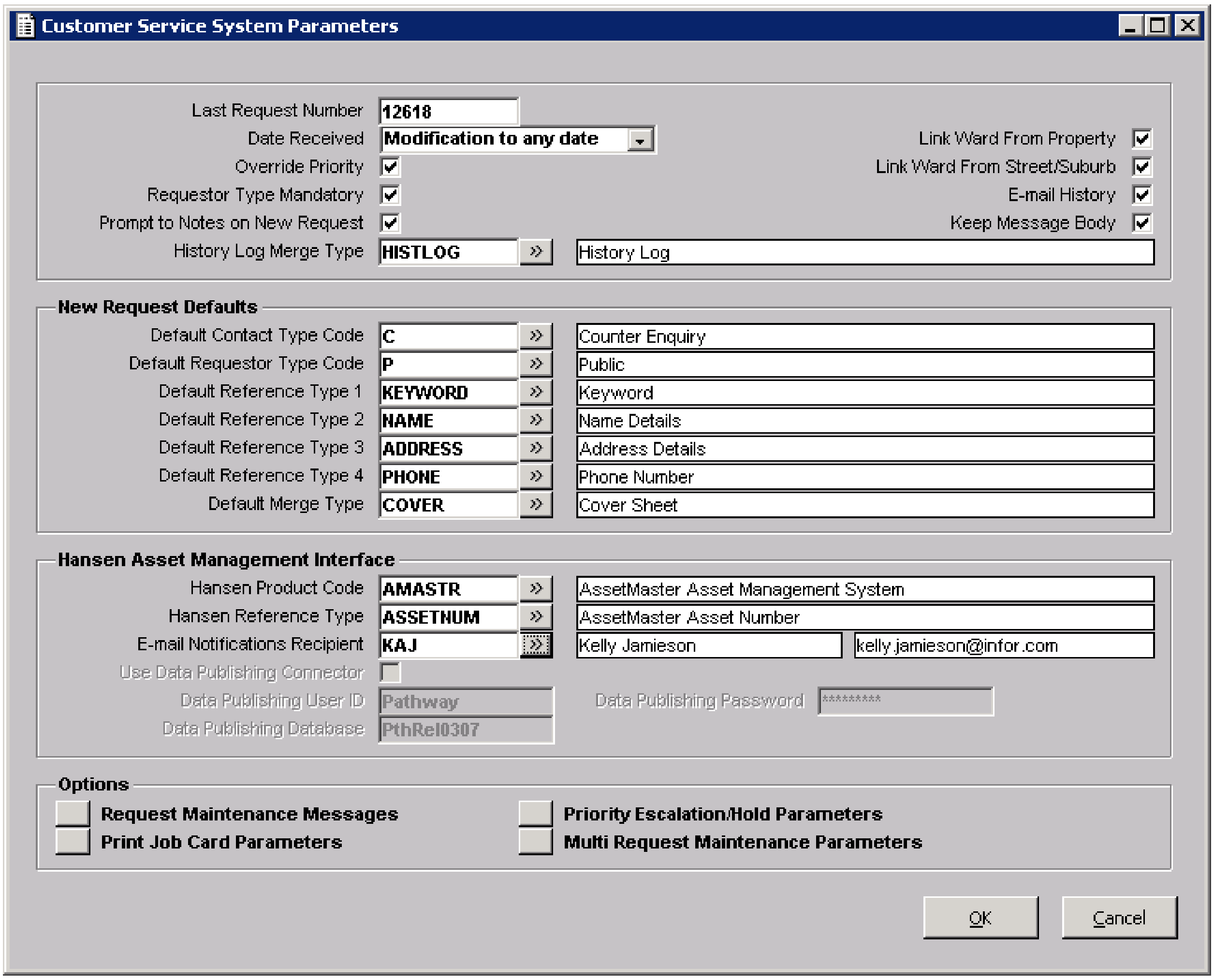
The following topics are covered in this chapter:

Customer Service Parameters
Multi Request Maintenance Parameters
Secured Functions
Secured Functions Maintenance
Assets Management Interface
DynaRep Call Manager Interface
GIS Interface
Request Status Maintenance
Request Type Maintenance
Contact Type Maintenance
Requestor Type Maintenance
Role Type Filter
Merge Type Parameters
Extract Type Parameters
User Defined Labels
User Action Parameters
Policy and Procedure Documents
Request Summary – Secured Function Codes
History Log Action Parameters

# Customer Service Parameters

## Customer Service System Parameters Form

The Customer Service System Parameters are designed to set up a Request Number Range, New Request Messages, Additional Notes and Reminder Messages.



*Customer Service System Parameters Form*

### Last Request Number

The Next Request Number is designed to display the Number that the Requests are at. As a Request is entered the Number will increment by 1. If a Request is begun and then deleted, prior to saving the Request, this number is then lost from the Range. It is not recommended that a User modify this number once created.

### Date Received

This field allows you to nominate whether or not the Date Received on the Request may be modified.

The Date Received is automatically entered by the system and uses the system date/time function.

Three options are available:-

- Modification to an earlier date
  On Request Entry the user may modify the Date Received to any date prior to the system date.

- No Modification
  On Request Entry the user may not modify the Date Received.

- Modification to any date
  On Request Entry the user may assign any date to the Date Received field.

**Override Priority**

Turning this flag on allows the User to modify the Priority set against a Request Type. If the box is left unchecked, then the User may not modify the Priority of the Request.

The Request Type determines the priority of the request. Priority overrides may be set at the Requestor level.

**Requestor Type Mandatory**

If this field is checked on, then the User is forced to enter a Requestor when adding a Request Type. A Requestor is the Person that requires some action to be taken by Council.

**Prompt to Notes on New Request**

Check this flag on to activate the functionality of prompting to the Notes field upon entering a new Request. The next field that will be prompted to, after selecting the 'Tab' key will be the Request Type. If this flag is set to 'Off', then the normal prompting will be performed, i.e. the first field prompted to on the Customer Service Request Entry screen will be the Request Type field. The Notes field will still be maintainable and allow entry by the user.

**Note**: This is a secured function. Authority is required for access to this field.

**History Log Merge Type**

This field allows the user to specify a default Merge Type to be used when the 'Print' button is pressed on the History Log Enquiry form. This is part of the Authorised Function "Customer Service History Logging" and as such will not be visible on this form if the user does not have access to this function.

**Note**: This is a secured function. Authority is required for access to this field.

**Link Ward from Property**

If this option is checked on, then when a Property is linked to the Customer Service Request, the Ward in which the Property resides will automatically be linked to the Customer Service Request. This depends on the Ward module link being selected for the associated Request Type. If the Ward module link is not available for the selected Request Type then the Ward details are not created. This flag will be set on as the default.

**Link Ward from Street/Suburb**

If this option is checked on, then when a Street/Suburb location is linked to the Customer Service Request, the Ward in which the Street/Suburb resides will automatically be linked to the Customer Service Request. This depends on the Ward module link being selected for the associated Request Type. If the Ward module link is not available for the selected Request Type then the Ward details are not created. This flag will be set on as the default.

**Email History**

The 'Email History' flag allows the user to determine whether a history of all emails that are sent on behalf of a Customer Request are recorded against the Request. When this option is checked on all emails that are sent on behalf of a Request will be recorded and available for viewing from Request Maintenance.
To access this function, from within Request Entry/Enquiry, click on the Options pull down menu and select the 'Email History' option. This will display a selection form 'Email Log Selection' of all emails sent for the current Request. Individual emails may then be displayed showing the originating user, the Date and Time the email was sent, all recipients of the email, the message text and a list of any attachments

included in the email. Note that the attachments are the links to the original attached objects, not the objects themselves. In the case of a failure to send an email, an additional error code field will be displayed along with the user details etc. The user can double-click on this field to better view the error text associated with the failure.

**Keep Message Body**

The 'Keep Message Body' flag allows the user to determine whether the 'Message Body' of the email that is sent by a Request is also kept as part of the Email History. When the 'Email History' flag is checked off, the 'Keep Message Body' option will not be available.

**Default Contact Type Code**

These fields are used to set up a default Contact Type for Customer Service. The Contact Type is a default code used to assign to each Request Type. The Contact Type is usually how the Request was received. For example this may be by Phone, Mail, E-mail etc. The user may simply key the code they know is assigned to the default Contact Type, or Use the Pop Up Button to select from the list of Predefined Contact Types. Contact Types are established using Contact Type Maintenance. This is a mandatory field.

**Default Requestor Type Code**

These fields can be used to set up a default Requestor Type for Customer Service. The default Requestor Type allows the establishment of a default Requestor Type that may make a Customer Request to the Council. The user may simply key the code, or Use the Pop Up Button to select from the list of Predefined Requestor Types. Requestor Types are established within Requestor Type Maintenance under Parameters.

**Default Reference Type 1**

Up to four default Reference Types can be defined. Reference fields of these Types will then be displayed on the Request Entry/Maintenance screen for all Request Types. If only one Reference Type is defined at the Parameter level, then only one Reference field will appear on the Request Entry/Maintenance screen. Enter a Default Reference Type or make a selection from the Reference Type Pop Up.

**Note**: This is a secured function. Authority is required for access to this field.

**Default Reference Type 2**

Up to four default Reference Types can be defined. Reference fields of these Types will then be displayed on the Request Entry/Maintenance screen for all Request Types. If only one Reference Type is defined at the Parameter level, then only one Reference field will appear on the Request Entry/Maintenance screen. Enter a Default Reference Type or make a selection from the Reference Type Pop Up.

**Note**: This is a secured function. Authority is required for access to this field.

**Default Reference Type 3**

Up to four default Reference Types can be defined. Reference fields of these Types will then be displayed on the Request Entry/Maintenance screen for all Request Types. If only one Reference Type is defined at the Parameter level, then only one Reference field will appear on the Request Entry/Maintenance screen. Enter a Default Reference Type or make a selection from the Reference Type Pop Up.

**Note**: This is a secured function. Authority is required for access to this field.

**Default Reference Type 4**

Up to four default Reference Types can be defined. Reference fields of these Types will then be displayed on the Request Entry/Maintenance screen for all Request Types. If only one Reference Type is defined at the Parameter level, then only one Reference field will appear on the Request

Entry/Maintenance screen. Enter a Default Reference Type or make a selection from the Reference Type Pop Up.

**Note**: This is a secured function. Authority is required for access to this field.

**Default Merge Type**

Enter a Default Merge Type or make a selection from the Merge Type Pop Up. This Merge Type will be defaulted into 'Print Maintenance', which is accessed when the Print Button is selected in Customer Service Request Entry/Maintenance, only if the Request Type does not have a default Merge Type defined.

**Note**: This is a secured function. Authority is required for access to this field.

**Assets Management Interface**

**Assets Product Code**

This field allows the user to enter or select an Assets Maintenance product. Enter an Assets Product Code or make a selection from the Assets Pop Up.

**Note**: This is a secured function. Authority is required for access to this field.

**Assets Reference Type**

This field allows the user to enter or select an associated Assets Reference Type. Enter an Assets Reference Type or make a selection from the Reference Type Pop Up. (This Reference Type must firstly be set up within References.)

**Note**: This is a secured function. Authority is required for access to this field.

**E-mail Notifications Recipient**

The Asset Management Interface area frame now contains a new field (as of Release 3.05) labelled *E-mail Notifications Recipient*. The associated pop-up button provides access to the standard User Pop-up form to allow the selection of the nominated User. (Note that the pop-up form will only display Pathway Users that have an e-mail address defined.)

This field allows the Pathway User to whom e-mail notifications from the Asset Management interface should be sent, to be nominated:-

**Use Data Publishing Connector**

The Use Data Publishing Connector field is available when the selected Asset Product is the Hansen Asset Management System. This field governs whether the Hansen Data Publishing interface should be used in supporting integration with the Hansen Asset Management System.

**Note**: This is a secured function. Authority is required for access to this field.

**Data Publishing User ID**

The Data Publishing User ID field is available when the Use Data Publishing Connector field is activated. This field enables Council to specify the User ID that may be required by the Hansen Data Publishing Connector to make calls to the Hansen Asset Management System.

**Note**: This is a secured function. Authority is required for access to this field.

**Data Publishing Password**

The Data Publishing User Password field is available when the Use Data Publishing Connector field is activated. This field enables Council to specify the Password that may be required by the Hansen Data Publishing Connector to make calls to the Hansen Asset Management System.

**Note**: This is a secured function. Authority is required for access to this field.

**Data Publishing Database**

The Data Publishing Database field is available when the Use Data Publishing Connector field is activated. This field enables Council to specify a database name, which identifies the Pathway environment that makes calls to the Hansen Data Publishing connector.

**Note**: This is a secured function. Authority is required for access to this field.

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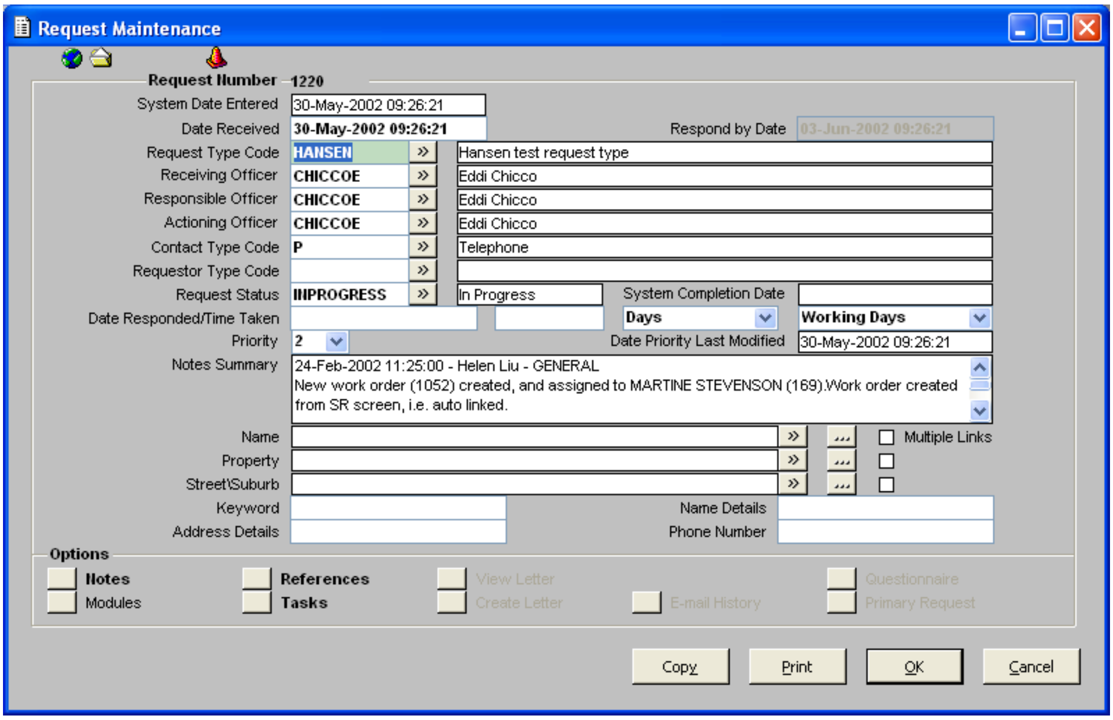
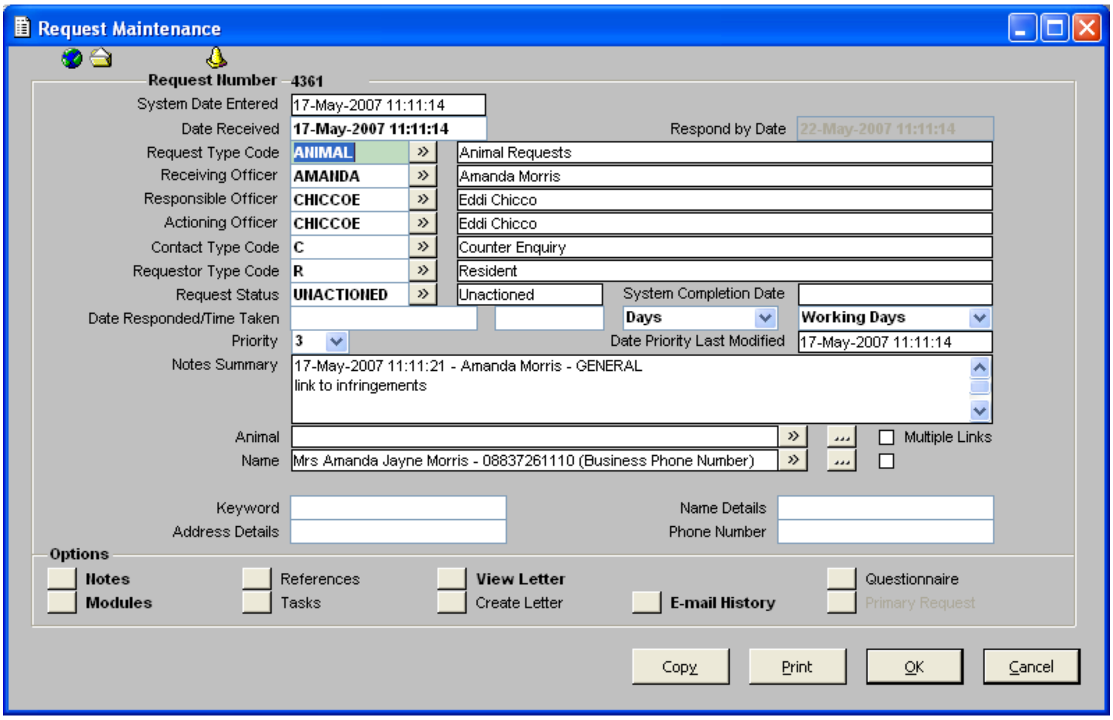
HANSEN INTERFACE GLYPH

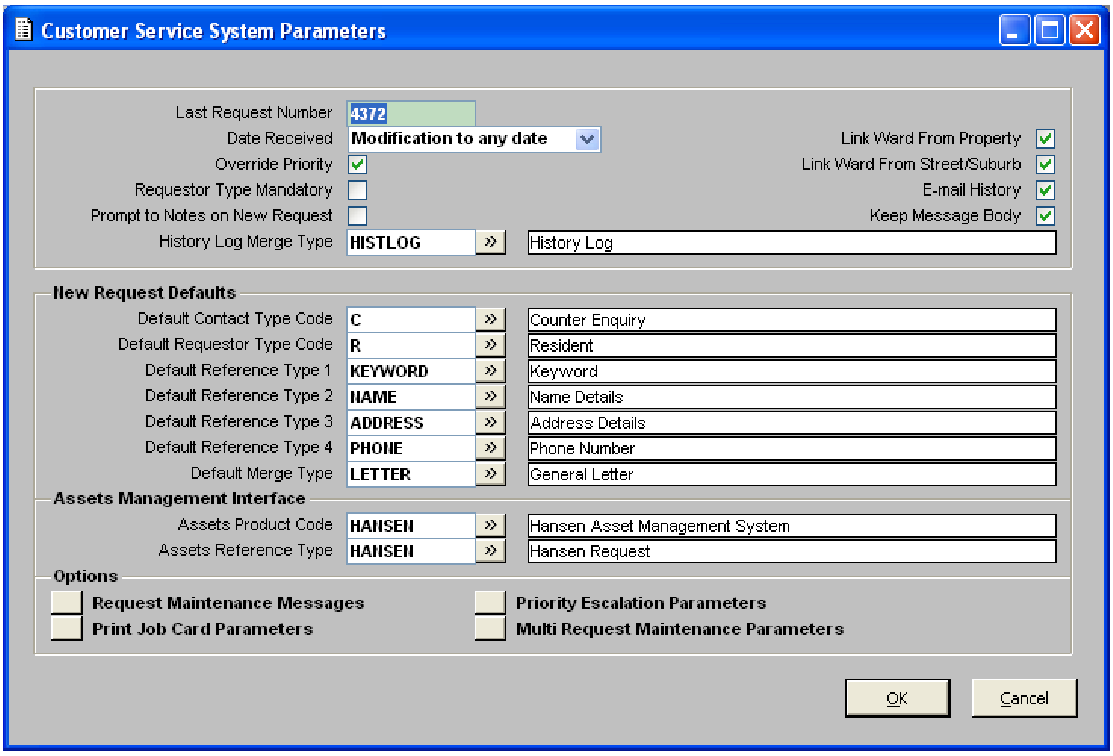
This is an enhancement for when using Hansen Asset Management System. It will allow a URL hot link to be displayed in Pathway Customer Service system. The glyph shown will be a Witches Hat as shown below. It will be red in colour if a Hansen Request has been created,




… and it will be yellow in colour if a Hansen Request has not been created.

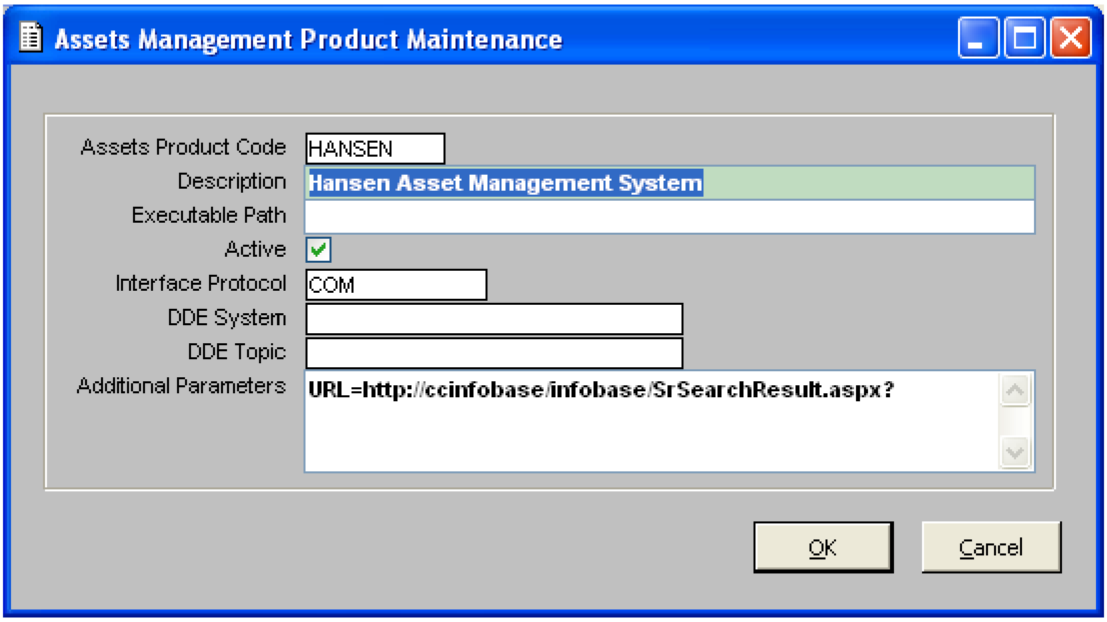



We know that a Hansen Request has been created when there is a Reference for the Reference Type specified in the Customer Service System Parameters for the Assets Reference Type.




If the glyph is red or yellow and the user clicks on it then a parameter defined URL will be opened and the relevant Hansen record displayed via a Web form.

The parameter defined URL needs to be defined in the Additional Parameters for Assets Product Code ‘HANSEN’ in Menu Option ‘System Administration >> Customer Service >> Asset Management Product Maintenance’ as follows:




Using the above information the URL will be:
http://ccinfobase/infobase/SrSearchResult.aspx?SERVNO=1220

The SERVNO is the Customer Service Request Number.

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**Options - Request Maintenance Messages**
Selection of this Option button displays the Request Message Maintenance form.

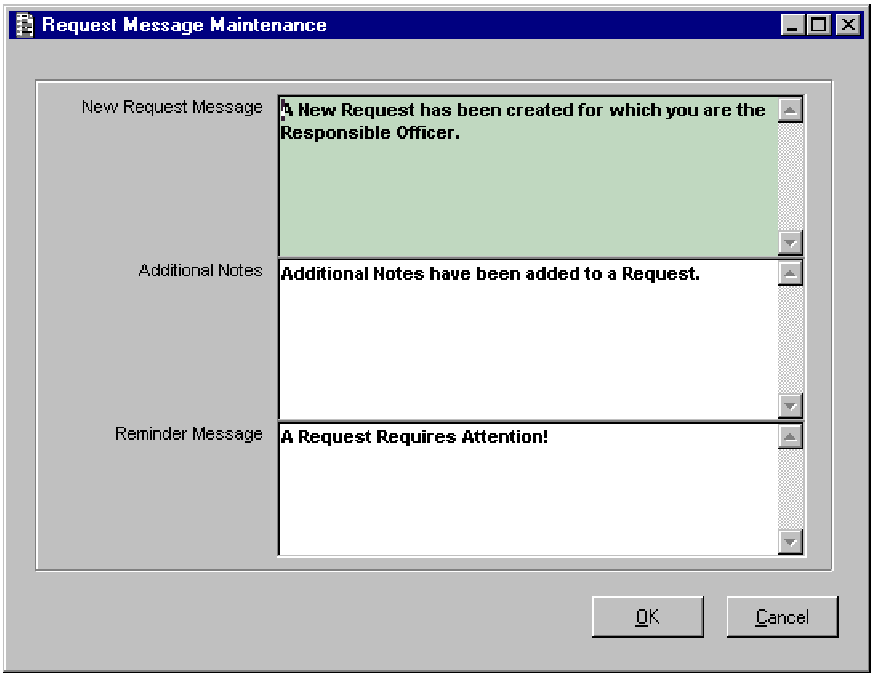
**Options - Priority Escalation/Hold Parameters**
Selection of this Option button displays the Priority Escalation/Hold Parameter Maintenance form.

**Options – Print Job Card Parameters**
Selection of this button displays the Job Card Report Parameter Maintenance form.

**Options – Multi Request Maintenance Parameters**
Selection of this button displays the Multi Request Maintenance Parameters form.

## Request Message Maintenance Form

Text may be entered on this form to display in allocation emails which are to be sent when a new Request is created, an existing request is maintained (perhaps the Actioning officer is changed), new notes are added, or the Request has its Priority escalated.




*Request Message Maintenance Form*

**New Request Message**
This field allows the user to enter a specific Message that will be used when an e-mail is sent to the Actioning Officer to advise that a new request has been entered. Up to 250 characters may be entered.

**Additional Notes**
This field allows the user to enter a specific Message that will be used when an e-mail is sent to the Actioning Officer to advise that changes to the Notes on a request for which that user is responsible has been made. Up to 250 characters may be entered.

If the current user changing notes on a request is also the Actioning Officer then no e-mail will be sent.

**Reminder Message**
This field allows the user to enter a specific Message that will be used when an e-mail is sent to the Actioning Officer to advise that a request for which that user is responsible is (or will be) overdue. Up to 250 characters may be entered.

## Priority Escalation/Hold Parameter Maintenance Form

Functionality has been introduced (in Release 2.15) to enable a Request’s Priority to be escalated by a background batch job and emails to be sent to chosen Pathway users with Request details and escalation/re-notification messages. (The existing “Automatic Priority Escalation” function remains unchanged.)

The process of Request escalation is driven by batch jobs running on a Background Job Queue.

Under the modification, a Request’s Priority is escalated if a pre-defined checkpoint is reached without the Request having been completed. The pre-defined checkpoints (i.e. priority escalation parameters), which are defined via the existing Priority Escalation Maintenance function against a Request Type, are used to calculate the escalation date/time and determine the recipients to whom the emails are sent. The existing Priority Escalation Parameter Maintenance, which is part of System Parameter Maintenance, now allows a user to choose whether to use this enhanced function or not. Similar to the existing manual option “Automatic Priority Escalation” function, the Automatic Priority Escalation flag against a Request

Type is also used to control the “Background Request Escalation” function for the particular Request Type.

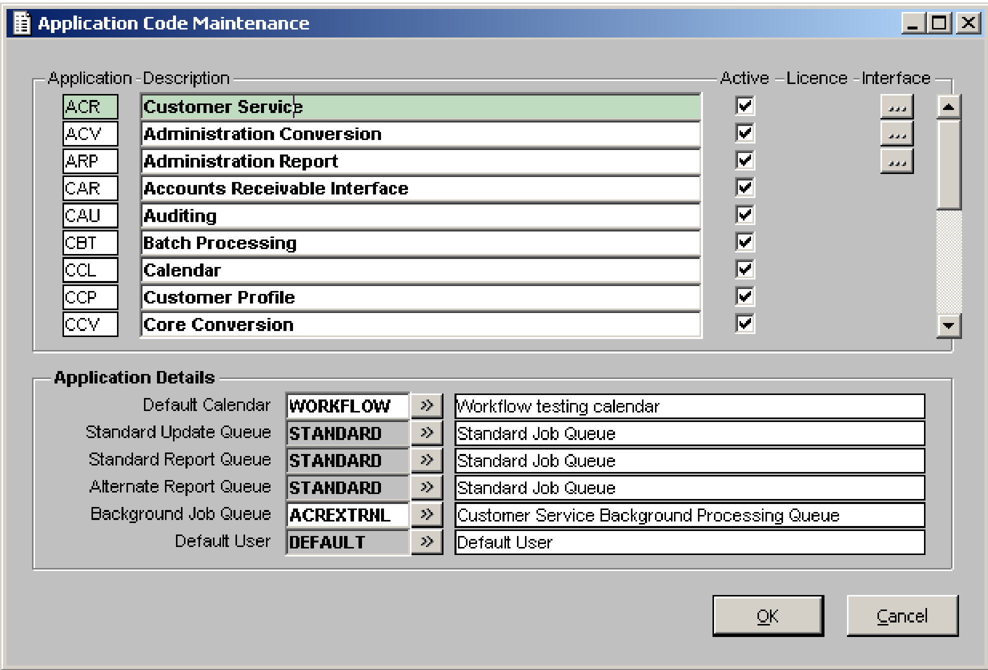
The Priority Escalation Parameter Maintenance form includes a new checkbox, “Use Background Escalation”, to allow a user to check the “Background Priority Escalation” function on or off. When the “Use Background Escalation” is checked on from off, new background escalation jobs are submitted for all incomplete Requests in the system if their Request Type’s priority escalation parameters are present.

Additionally, sites utilising this enhanced function will need a Background Job Queue running, preferably one dedicated to the Customer Service application. It is important that the machine used is Windows-based and has an email client configured. Emails sent from this machine will appear to be from the user who is logged on to it.

**Background Request Escalation Processing – How it works**

The process of Background Request Escalation is handled by batch jobs running on a Background Job Queue. The Background Job Queue needs to be specified in System Parameters. To set this up proceed as follows:

1. Access System Administrator>>System Parameters
2. Select Application Code Maintenance
3. Place focus on the Customer Service Application
4. In Application Details, select the Background Job Queue Pop Up button and select the Job Queue created in Batch Processing for this purpose (e.g. ACRBGRD – Customer Service Background Processing Queue)
5. Click OK to save the details




To enable this enhanced function, the Priority Escalation Parameter (as part of Customer Service System Parameters) “Use Background Escalation” also needs to be checked on.

Each time a Request is created, by whatever means, a check is made for priority escalation parameters and the Automatic Priority Escalation flag against the relevant Request Type. If priority escalation parameters are present and the Automatic Priority Escalation flag is checked on, a delayed job is submitted to the Background Job Queue used by Customer Service. It is set to run at the time the first escalation is due for the Request.

When the escalation processing job for a Request runs, it sends emails to the appropriate recipients. Of course, there is no escalation performed and no emails are issued if the Request has been completed or if the Automatic Priority Escalation flag has been checked off.

The Calendar against a Request Type (if specified) and the Calendar Format against a Request are used in determining the next escalation date. For example, take a Request with a Calendar Format of Working Days, where the calendar specifies a working day of 8:30 AM to 5:00 PM. If the last modified date (for a new Request it is the receiving date) for a Request is at 10:00 AM on Friday, with the next escalation due to be sent 10 hours after last modified date, the escalation job is sent at 11:30 AM on next Monday.

The background escalation jobs for existing Requests created before Rel.2.15 are submitted by maintaining the System Parameters. When a user ticks on the “Use Background Escalation” on the Priority Escalation Parameter Maintenance screen, new background escalation jobs are submitted for each incomplete Request in the system if its Request Type’s priority escalation parameters are present and the Automatic Priority Escalation flag is checked on.

To cover all eventualities, whenever the priority escalation parameters against a Request Type are modified, a different background job runs to submit new escalation jobs for incomplete Requests of the relevant type. Additionally, if a Request’s Priority changes, for example, changed by a user manually, a new escalation job is submitted. Escalation processing jobs are able to detect whether they’ve been “superseded” by another job, in which case they exit immediately, without sending any emails or submitting further jobs. This prevents a build-up of escalation jobs servicing the same Request.

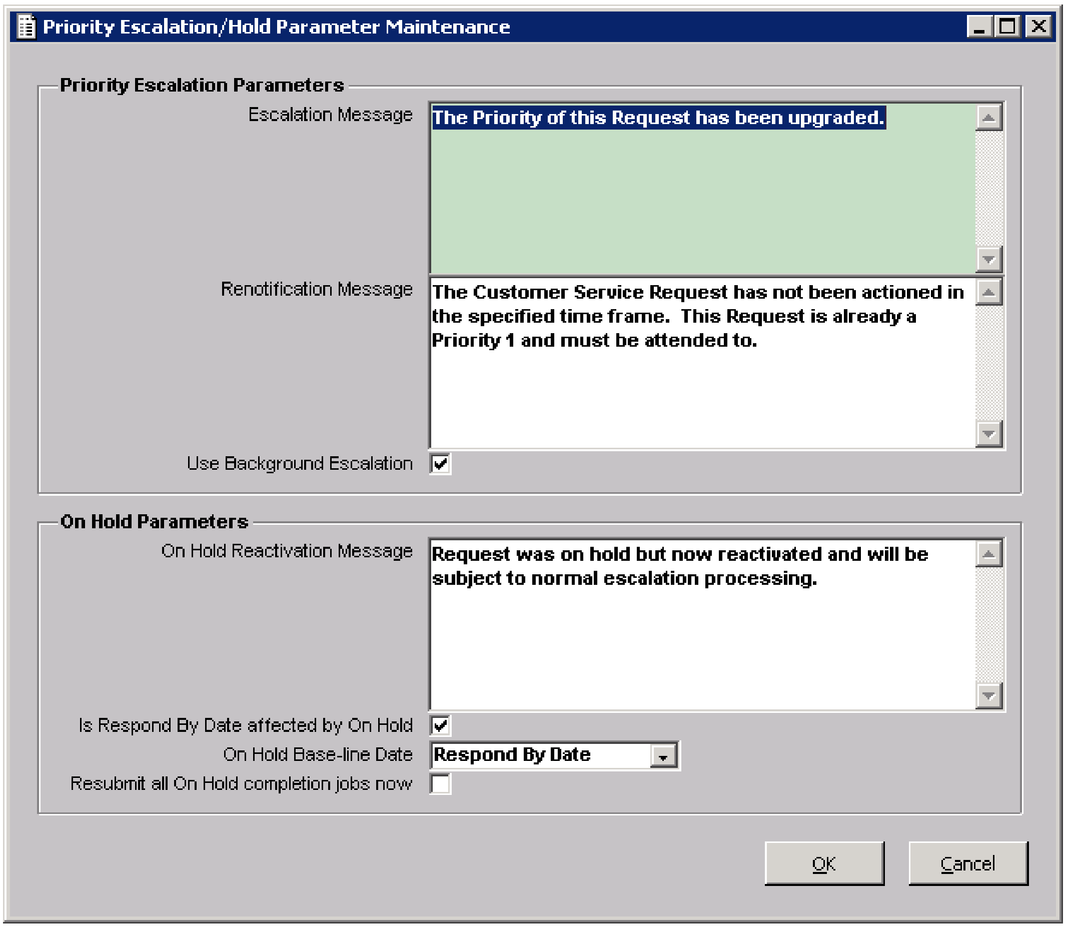
The subject lines and message bodies of emails sent to selected Pathway users about an individual Request are dependent on the Request’s Priority. For a Request with Priority 2, 3, 4 or 5, the recipient(s) receives an escalation message as defined on the Priority Escalation Parameter Maintenance (as part of the System Parameters) with a subject line similar to the following:

> Priority Escalation: Request 54357 Priority 3: has been escalated.

For a Request with Priority 1, the recipient(s) receives a re-notification message as defined on the Priority Escalation Parameter Maintenance (as part of the System Parameters) with a subject line similar to the following:

> Priority Escalation: Request 54358 Priority 1: has been re-escalated.

The message also contains a “.pth” file as an attachment. Opening this activates the Request Maintenance form in a new Pathway session in the relevant environment, allowing access to the details of the Request.



*Priority Escalation/Hold Parameter Maintenance Form*

**Escalation Message**
This field holds the email message text that will be sent when the priority on a Request is escalated. Up to 250 characters may be entered.
The subject on the email message will read "Request <*Request Number*>, <*Request Type Description*> has been escalated"

**Renotification Message**
This field will hold the message text that will be sent when a priority one Request has not been actioned in the allocated time frame. Up to 250 characters may be entered.
The subject on the email message will read "Request <*Request Number*>, <*Request Type Description*> has been re-escalated"

**Use Background Escalation**
If this flag is checked ON while the Background Job Queue is not started and the OK button clicked on this form then the following message will display:
"Existing escalation jobs for Requests with the relevant Request Type could not be superseded. The Background Job Queue is not started."
The user will need to start the Background Job Queue.
If the background job queue is started, a new background job to supersede existing escalation jobs will be submitted. When this job is started, it will submit a new escalation job for each incomplete Request in the system. (See further details under "**Background Request Escalation Processing – How it works" (13))**

**On Hold Reactivation Message**
This message is sent to the Actioning and/or Responsible Officer when a Request that has been On Hold is automatically reactivated by the system at the completion of the hold duration (as specified against the Request Status parameters).

**Is Respond By Date affected by On Hold**
When a Request is placed On Hold the system will recalculate/adjust the Respond By Date for a Request if this option is checked. If it is not checked, the Respond By Date will be unaffected.

When checked, the Respond By Date will be calculated as:

Respond By Date = Today's Date (ie. Date Placed On Hold) + Hold Duration + Normal Duration for Current Priority

**On Hold Base-line Date**
This determines the date from which the On Hold duration will be applied.
Can be set to "Respond By Date" or "Today's Date" (default).

E.g. If hold duration is 90 days and this setting is set to "Today's Date", then the Hold completion will be scheduled for 90 days from today. If, however, this setting is "Respond By Date", then the 90 days is calculated from the Respond By Date entered on the Request.

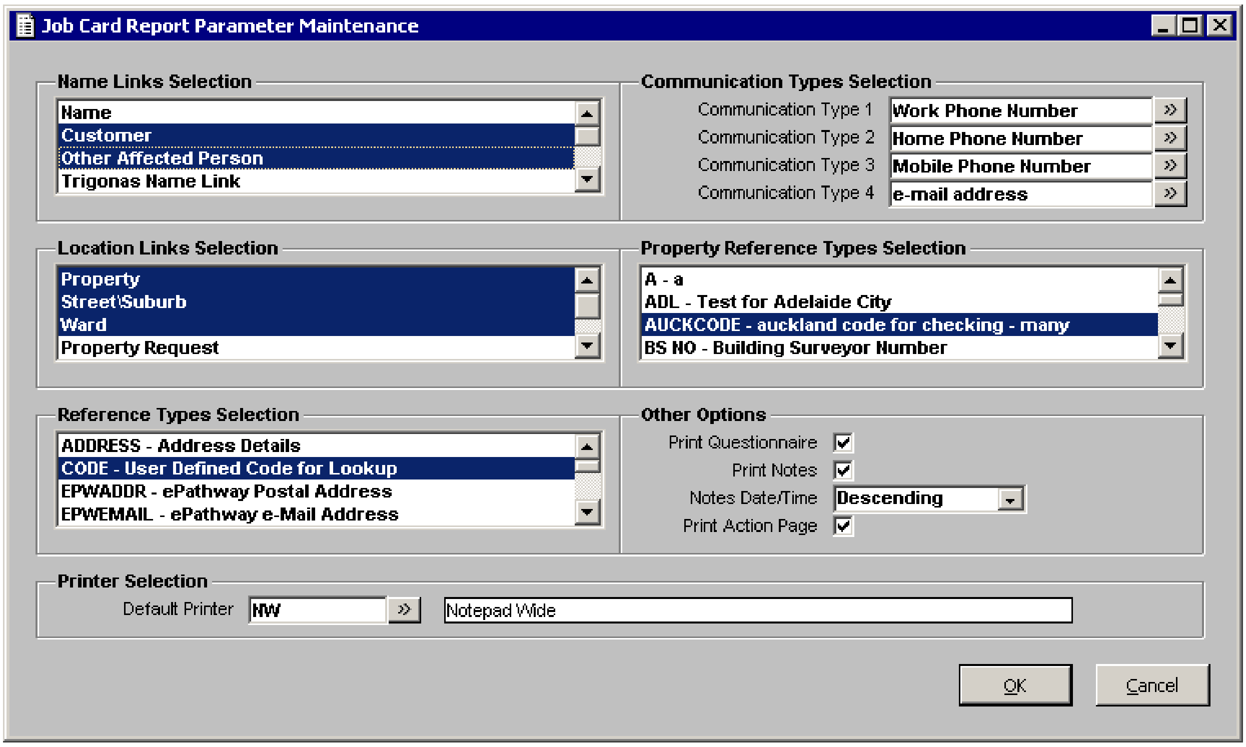
It should be noted that if this is set to "Respond By Date" and "Is Respond By Date affected by On Hold" is enabled, then the On Hold Completion date will be the same as the Respond By Date.

**Resubmit all On Hold completion jobs now**
This will recalculate and resubmit the Hold completion jobs for all Requests which currently have an On Hold Status when this parameter form is saved.

This might be used for new sites after conversion from another system or if for some reason the Background Batch Queue for Customer Service has been cleared or changed.

## Job Card Report Parameter Maintenance Form

The Job Card Report Parameter Maintenance form allows the user to nominate Name Links, Location Links, References, a Questionnaire, Notes and an option to Print the Action Page. See further details under Job Card Button in Request Selection.



*Job Card Report Parameter Maintenance form*

**Name Links Selection**
The Name Link Selection field allows the selection of the Module Link that represents the “Customer” or the “Client” of the Job Card. When the Name details are printed, the mailing address of the name will also be printed. In the case of multiple names for the link against the Request, all names and mailing address will be printed.

When the name module link is defined, the ability to select up to four (4) Name and Address Communication Types is also provided to allow contact numbers to be extracted onto the Job Card.

**Location Links Selection**
The Location Link Selection field allows the selection of the Module Links that represent the location of the issue. Any Property based link will be able to be selected, i.e. Any Property or Street/Suburb based link. The ward Module link will also be available for extraction.

When the Location Links are printed, the formatted location details will be displayed as per current on-screen functionality.

For each Property Link the ability to select Property References is available. The user may nominate which references to extract to the Job Card.

**Reference Types Selection**
The Reference Types Selection field displays the Reference Types that are available in Customer Service. The user is able to select which Reference Types are to be printed on the Job Card.

**Communication Types Selection**
When the name module link is defined, the Communication Types Selection fields allow the user to select up to 4 Name and Address Communication Types to allow contact numbers to be extracted onto the Job Card.

**Property Reference Types Selection**
For each Property Link the user is able to select Property References. The user may nominate which references to extract to the Job Card.

**Other Options**
The user is able to nominate whether the **Questionnaire** details will be printed on the Job Card.

The user is able to nominate whether **Notes** should be printed on the Job Card and in which order they should be printed, i.e. Descending or Ascending Date Order. When the Report is printed, security relating to Note Types will take effect and any Notes which the user, who is printing the Job Card, does not have access to, will not be printed.

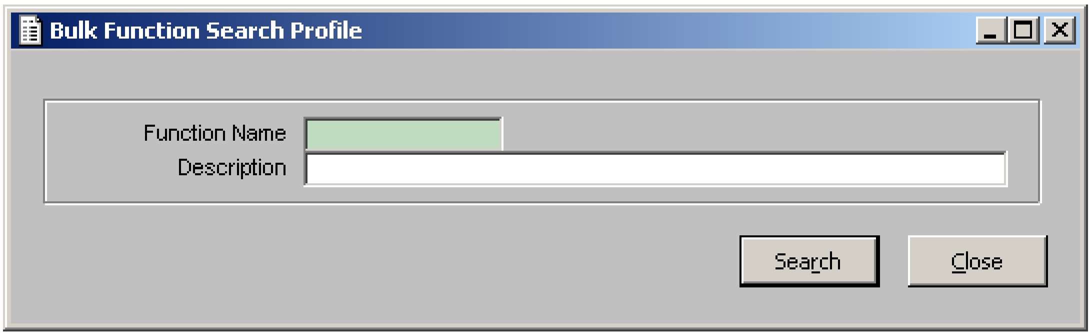
The **Print Action Page** option is an ON\OFF indicator which will default to OFF. This option requests that an Action Page be printed that will allow the Actioning Officer to record any actions taken for the Job. This will then allow data entry to occur once the Actioning Officer has returned and completed the job.

**Printer Selection**
The Printer Selection fields allow the user to define the “Printer” to be used. The list of Printers will be sourced from those defined within Pathway. The selected Printer will be used when printing the Job Card Report.

# Multi Request Maintenance Parameters

## Bulk Function Search Profile Form

This form (which is accessed via System Administration>>Customer Service>>Bulk Function Maintenance) enables a search to be performed over the Bulk Functions to retrieve a specific record, or a general search may be performed by selecting the Search button with no criteria specified.



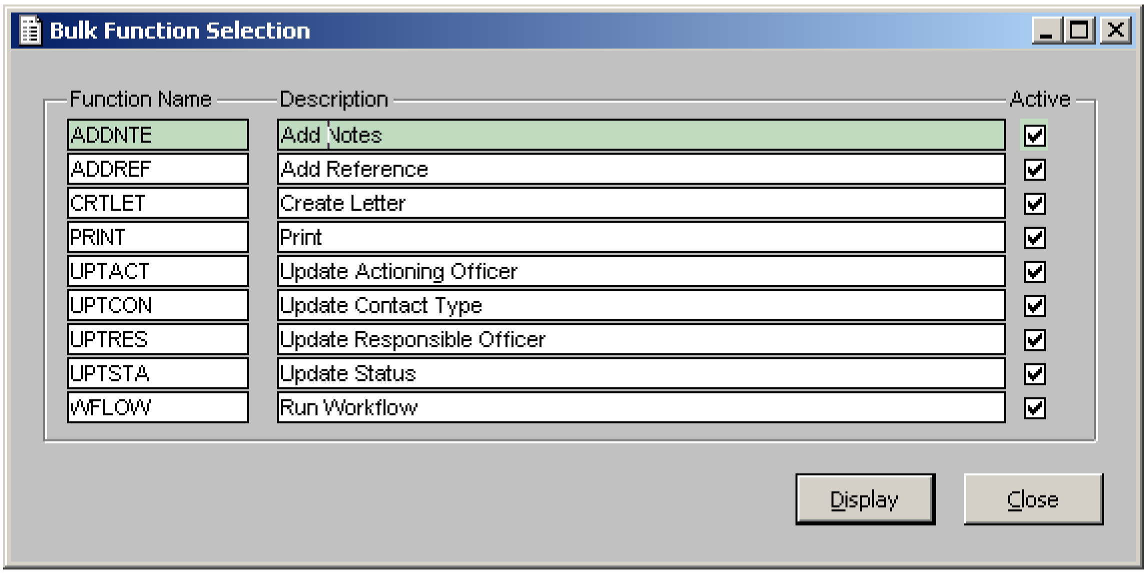

*Bulk Function Search Profile form*

### Function Name/Description

These fields allow a Function Name and/or Description to be entered to initiate a Search using the Search button.

## Bulk Function Selection

This form (which is accessed via System Administration>>Customer Service>>Bulk Function Maintenance) displays the nine Bulk Functions which are available in Customer Service.




*Bulk Function Selection form*

**Function Name/Description**

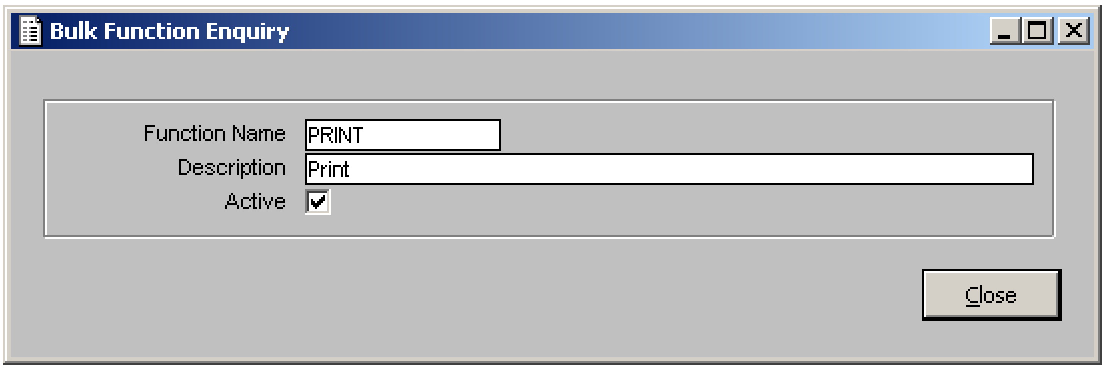
These fields display the Function Name and Description of the Bulk Functions which are available.

**Active Flag**

The Active Flag indicates if the Bulk Function is available for use. This Flag is not maintainable on this form.

## Bulk Function Maintenance/Enquiry

This form (which is accessed via System Administration>>Customer Service>>Bulk Function Maintenance) displays details of each Bulk Function. It is available only in Enquiry mode unless logged on as Administrator which will allow maintenance on this form.




*Bulk Function Enquiry form*

**Function Name/Description**

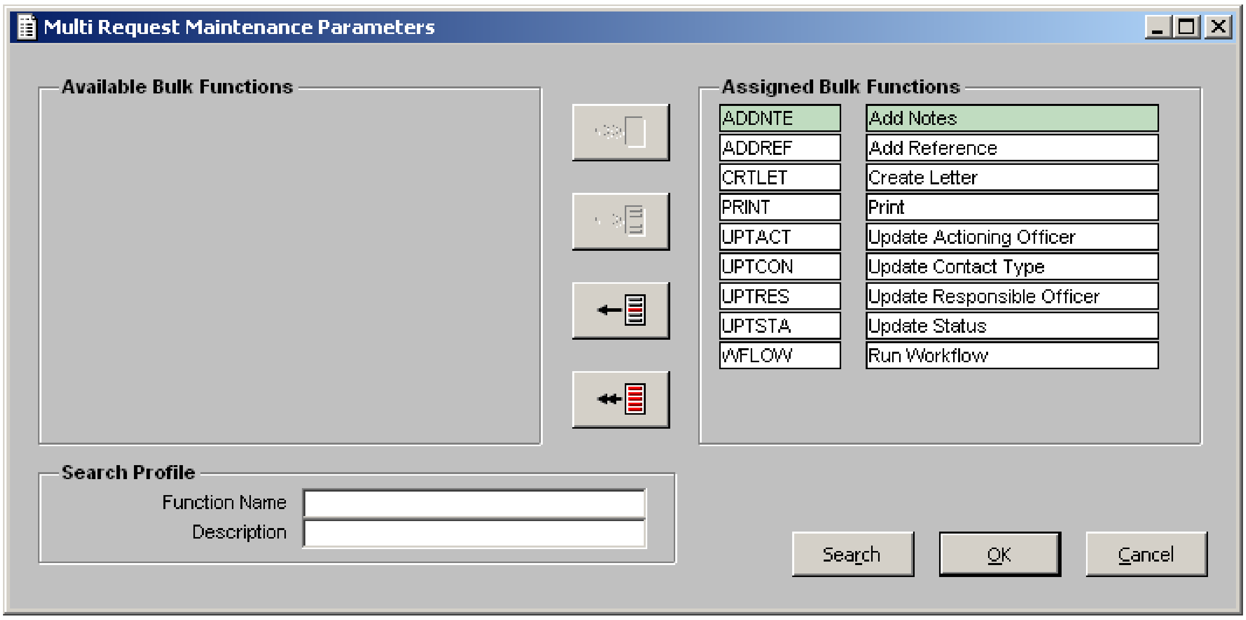
These fields display the Name and Description of the selected Bulk Function.

**Active Flag**

The Active flag indicates if the Bulk Function is available for use. This flag is not maintainable in Enquiry mode.

## Multi Request Maintenance Parameters form

This form allows available Bulk Functions to be assigned for use.




*Multi Request Maintenance Parameters form*

**Available Bulk Functions**

Fields on the left-hand side of the form contain Bulk Functions which are available to be assigned. To select one, ensure focus is on it and select the 'Select' button.

**Assigned Bulk Functions**

Fields on the right-hand side of the form contain Bulk Functions which have been assigned. To unassign one, ensure focus is on it and select the 'Remove' button.

**Search Profile – Function Name/Description**

Enter a Function Name and/or Description on which to perform a search. This is useful when there are more than 9 records.

# Secured Functions

The following secured functions can be assigned to specific users of Pathway. These secured functions are defined per Request Type. The use of each function relates to each Request Type that has the function set as 'In use'.

- Ability to create a Request
- Ability to delete a Request
- Ability to change the Request Type of a Request
- Ability to change the Date Responded on a Request
- Ability to change the Duration and Time Units on a Request
- Ability to change Module links on a Request
- Note Maintenance

**Ability to create a Request**
This controls not only the "New" button that is available, but also the Request Types that can be used by a specified user when creating a new request.
If this function is in use then the "New" button will be controlled based on the current user of Pathway. If the user is not assigned to this secured function against any Request Type then the "New" button will be hidden.
If this option is not set as in use for any Request Type then the "New" button will always be available.

**Ability to delete a Request**
If this function is in use for the specified Request Type then only authorised users will be allowed to delete a Request of the specified Request Type.
This check will only be performed when a Request is maintained.
In entry mode a Request will be able to be deleted by the entering user.
User authority will also be checked when the "Purging Requests" batch process is executed.

**Ability to change a Request Type**
If this function is in use for the specified Request Type, then only authorised users will be able to change the Request Type of the Request. The user will be able to change the Request Type to a Request based on the authorised settings.
When a request is being entered the ability to change the Request Type will be available to the user entering the request regardless of any authority settings.
If this function is not in use then any user will be able to change the Request Type.

**Ability to change the Date responded**
If this function is in use for the specified Request Type, then only authorised users will be able to change the Date Responded.
This will be active in entry or maintenance mode. This is because a request could be actioned as it is entered.
If this function is not in use then the user will be able to change the Date Responded as per current behaviour.

**Ability to change Duration and Time Units**
If this function is in use for the specified Request Type, then only authorised users will be able to change the duration and time units that are calculated.
This will be active in entry or maintenance mode. This is because a request could be actioned as it is entered.
If this function is not in use then the user will be able to change the Duration and Time Units as per current behaviour.

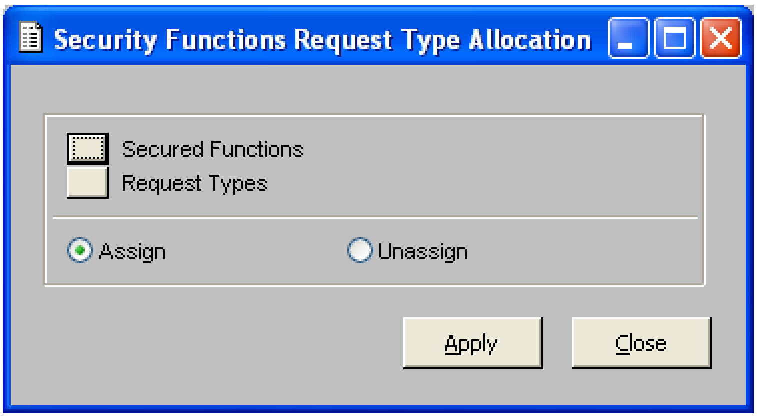
**Ability to change Module Links**
If this function is in use, this will allow the nominated user to add and delete module links to the customer service request. This will be controlled during maintenance only, and not enforced when a request is being entered.
If the function is not in use then the user will be able to maintain the module links as per current behaviour.

**Note Maintenance**
The ability to “Add”, “Delete” and “Supervisor Editing” access is required for Notes against a Request. The ability to Add Notes controls which users can add notes to a Request of the specified Request Type. The ability to Delete Notes controls which users can delete notes against the request for which they are not the author. The author of the note will always be allowed to delete notes that they have added. The author of the note is the “Responsible Officer” against the note.
“Supervisory Editing” will be allowed so that users can access a note that has been entered by another user and check on the ‘Allow Editing’ flag, if it is checked off. This will then allow the user to update the note details and make changes as required.

**Updating Security Functions**
Housekeeping functions have been created to allow the maintenance of secured functions against Request Types. This allows system administrators of Customer Service to quickly and efficiently assign and de-assign the relevant secured functions as required.

## Security Functions Request Type Allocation Form

This form allows the user to assign or de-assign security over one or many functions pertaining to one or many Request Types.



*Security Functions Request Type Allocation Form*

**Secured Functions**
Selection of this button displays the Secured Functions Selected form where any Available Secured Functions may be Assigned.

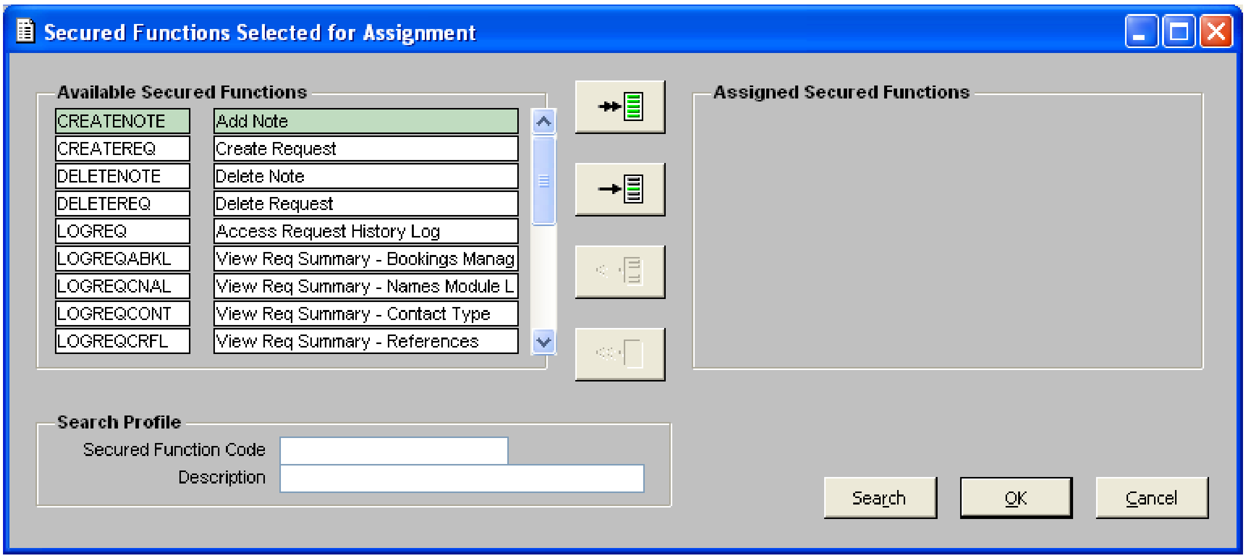
**Request Types**
Selection of this button displays the Request Types Selected form where any Available Request Types may be Assigned.

**Assign/Unassign Buttons**
The Assign/Unassign indicators are used to assign or de-assign the selected Secured Functions to the selected Request Types. If the Unassign indicator is set on then any users that were assigned to the function will have the function removed.

**Apply Button**
Once the Secured Functions and Request Types have been selected and either the Assign indicator or the Unassign indicator has been selected, clicking the Apply button will activate the security and retain the selections. There must be at least one function and one Request Type selected before the Apply button is clicked.

## Secured Functions Selected for Assignment

This form displays when the Secured Functions button is selected on the Security Functions Request Type Allocation form. It allows selection of one or more Secured Functions by using the Select/Select All and Remove/Remove All buttons to move Functions from the available side to the Assigned side of the form.




*Secured Functions Selected for Assignment Form*

### Available Secured Functions

These fields display a list of available Secured Functions. Use the Select/Remove buttons to assign any Secured Functions by moving them to the right hand side of the form.

### Assigned Secured Functions

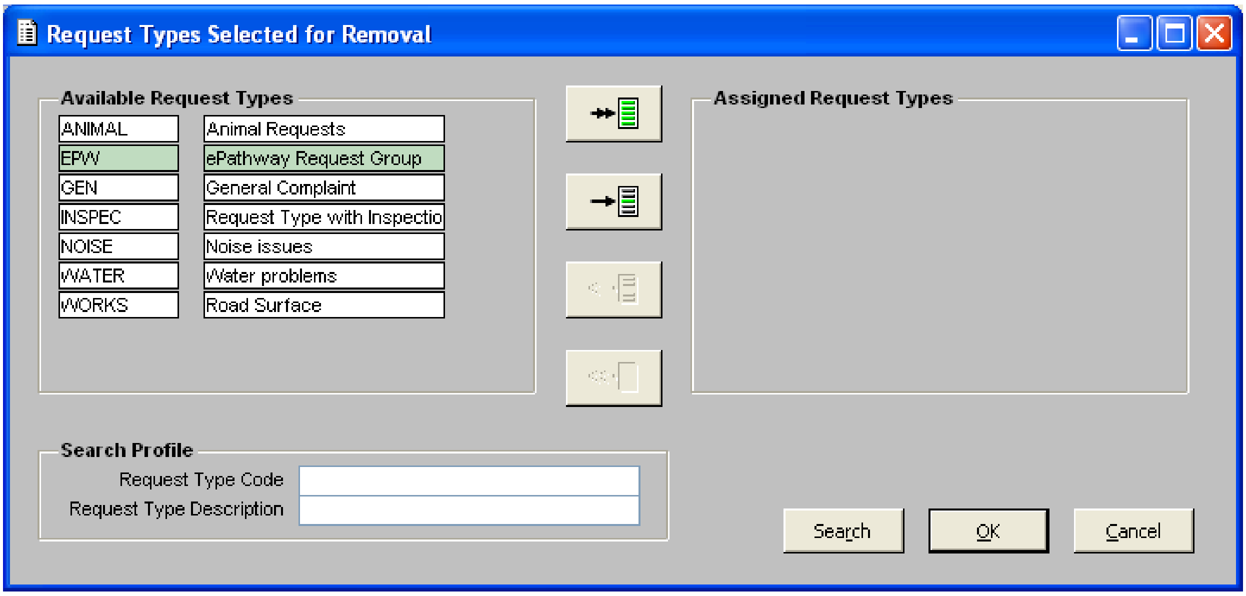
These fields display any Secured Functions which have been assigned. Use the Select/Remove buttons to assign or de-assign any Secured Functions.

### Search Profile – Secured/Description

These fields allow a Function and/or Description to be entered on which to conduct a search. This is useful when there are more than 9 Functions available and some are not immediately visible.

## Request Types Selected for Allocation/Removal or Assignment/Unassignment

This form displays when the Request Types button is selected on the Security Functions Request Type Allocation/Removal form. It allows selection of one or more Request Types by using the Select/Select All and Remove/Remove All buttons to move Request Types from the available side to the Assigned side of the form.




*Request Types Selected for Removal*

### Available Request Types

These fields display a list of available Request Types. Use the Select/Remove buttons to assign any Request Types by moving them to the right hand side of the form.

### Assigned Request Types

These fields display any Request Types which have been assigned. Use the Select/Remove buttons to assign or de-assign any Request Types.

### Detail Button

Clicking on the Detail button displays the ‘Functions per Request Types Selected’ form which allows the user to assign Functions per Request Type. This button does not display when the form is accessed via the Security Functions Request Type Allocation form.

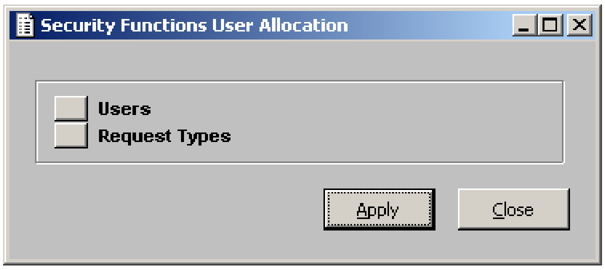
### Search Profile – Request Type Code/Description

These fields allow a Request Type Code and/or Description to be entered on which to conduct a search. This is useful when there are more than 9 Request Types available and some are not immediately visible.

## Security Functions User Allocation Form

This form allows the user to select one or more users along with one or many Request Types and for each Request Type select the Functions that need to be assigned to the user. This option will only display those functions that have been set as in use for each Request Type.

Note: The Apply button should be selected when the user wishes to save and apply their selections. There must be at least **one user, one Request Type and Function per Request Type** selected before the Apply button is clicked.




*Security Functions User Allocation form*

**Users**

Selection of the Users button will display the Users Selected form where one or many users can be assigned from the list of available users.

**Request Types**

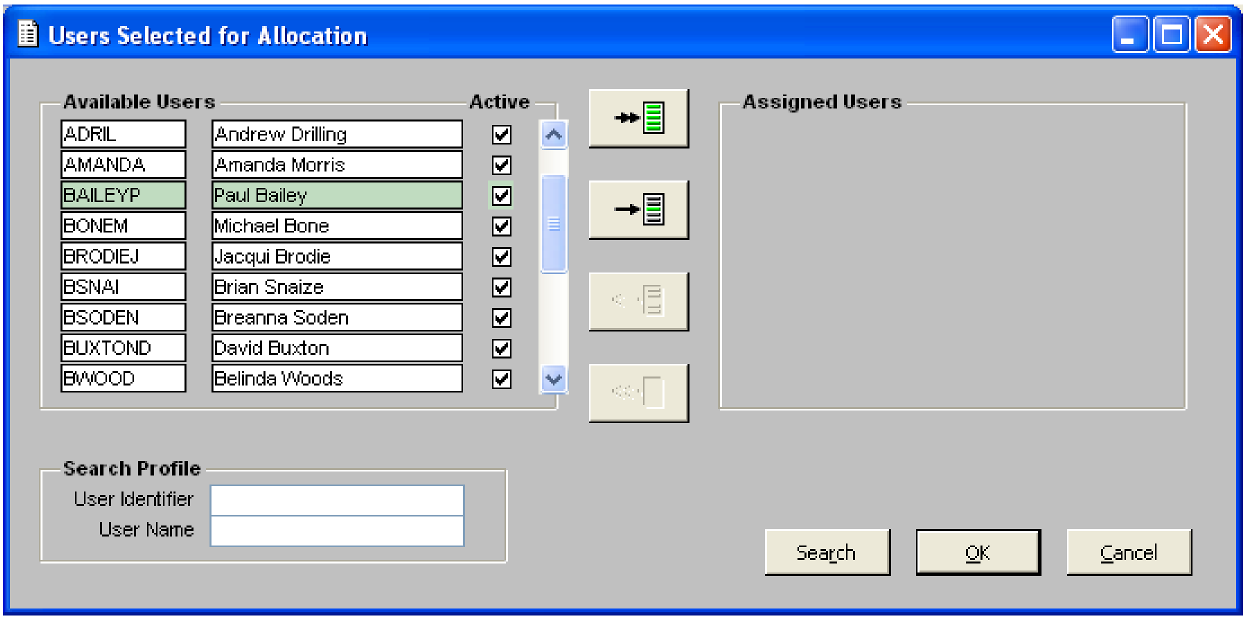
Selection of the Request Types button will display the Request Types Selected form where one or many Request Types may be selected from the list of available Request Types.

**Apply Button**

The Apply button should be selected when the user wishes to save and apply their selections. There must be at least one user, one Request Type and Function per Request Type selected before the Apply button is clicked.

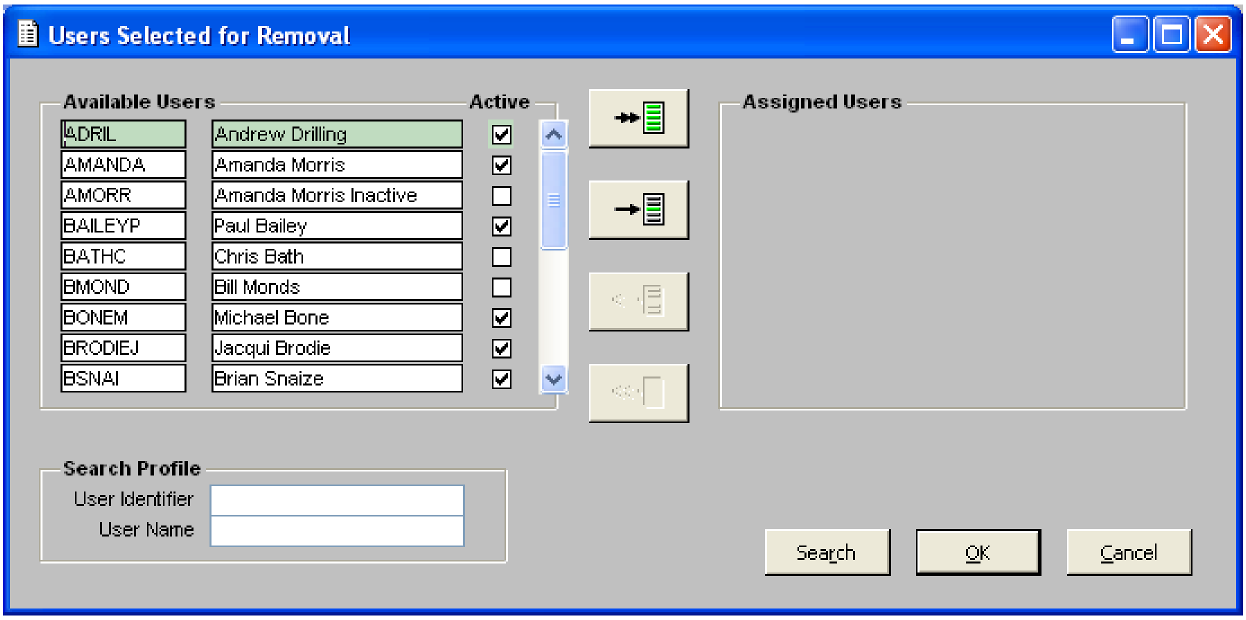
## Users Selected for Allocation/Removal

This form displays when the user clicks on the Users button on the Security Functions User Allocation form. It allows one or more Users to be assigned security over selected Request Types. When performing User Allocation only those Users that are currently flagged as 'Active' will be available for selection. The Active flag displays here for reference purposes.




*Users Selected for Allocation*

The 'Users Selected for Removal' form displays when the user clicks on the Users button on the 'Security Functions Remove User' form. It allows one or more Users to be assigned for removal from security over selected Request Types. This form will display 'Inactive' Users in the LHS (Available Users) section of the form. This is because one may need to unassign a User that has been made 'Inactive' but is still listed against Secured Functions. The Active flag displays here for reference purposes.




*Users Selected for Removal Form*

**Available Users**

These fields display all the available Users. The Select/Remove buttons may be used to move Users from one side of the form to the other to select or remove the user.

**Active Flag**

The Active flag displays for reference purposes against each user name to indicate their ‘Active’ status. When performing User Allocation only those Users that are currently flagged as ‘Active’ will be available for selection.

**Assigned Users**

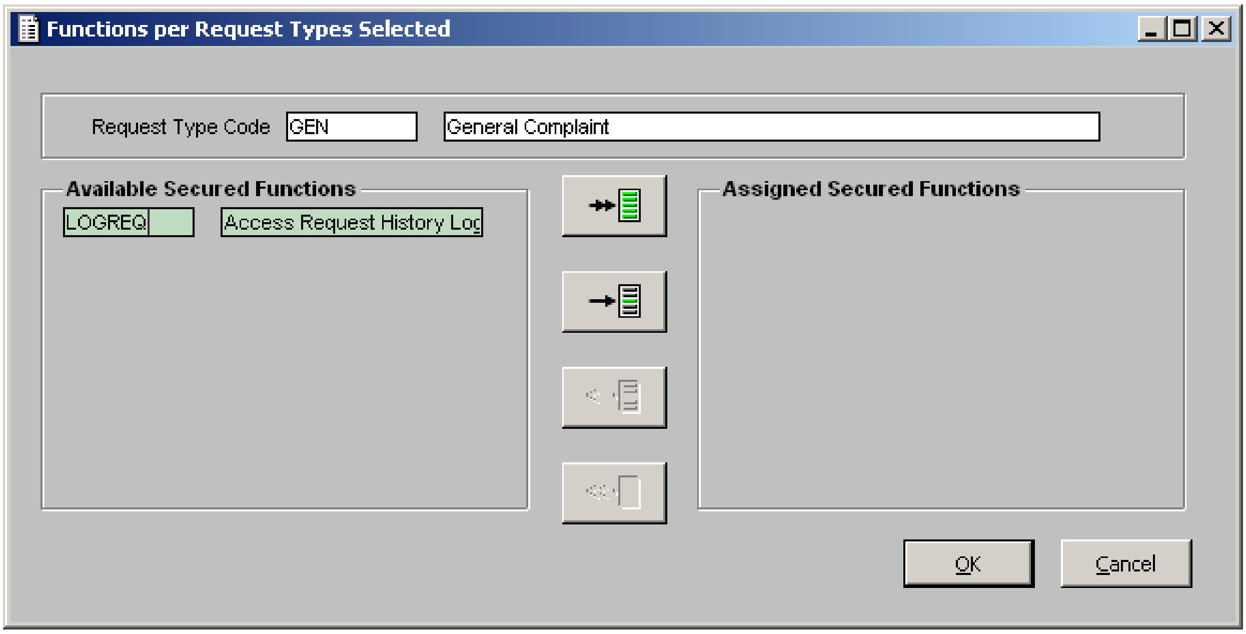
These fields list the Users who have been assigned security. The Select/Remove buttons may be used to move Users from one side of the form to the other to select or remove the user.

**Search Profile – User Identifier/Description**

These fields allow a User Identifier and/or Description to be entered on which to conduct a search. This is useful when there are more than 9 Users available and some are not immediately visible.

## Functions Per Request Types Selected

The Functions per Request Types Selected form allow available Secured Functions to be assigned per Request Type, and these Request Types are in turn assigned to Users.




*Functions Per Request Types Selected*

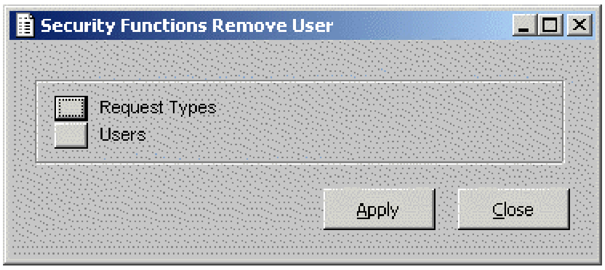
**Request Type Code**
These fields display the selected Request Type Code. These fields are display only.

**Available Secured Functions**
The fields on the left hand side of the form display the available Secured Functions for the selected Request Type. The Select/Remove buttons may be used to move available functions to the right hand side of the form to assign them.

**Assigned Secured Functions**
These fields display the Assigned Secured Functions for the selected Request Type.

## Security Functions Remove User Form

This function allows the operator to select one or many users and de-assign them from the list of authorised users for Secured Functions. It will allow the operator to nominate all Request Types, or specific Request Types. This function could be used if an employee has left the organisation and they are required to be removed from the list of secured functions.




*Security Functions Remove User form*

**Request Types**
Selection of the Request Types button displays the Request Types Selected form where one or many Request Types may be assigned.

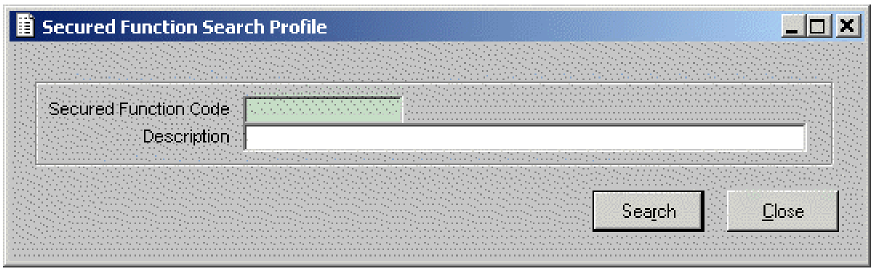
**Users**
Selection of the Users button displays the Users Selected form where one or many Users may be assigned for removal.

**Apply Button**

Selection of the Apply button will remove the assigned User/s from the assigned Request Types. There must be at least one Request Type and at least one User selected before the Apply button is clicked.

# Secured Function Maintenance

## Secured Function Search Profile

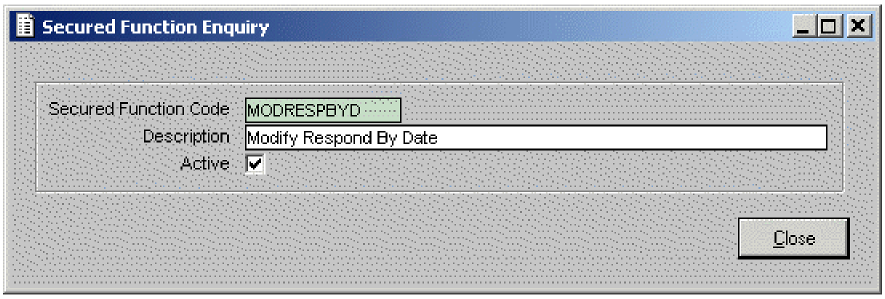



*Secured Function Search Profile Form*

**Secured Function Code**
Enter a Secured Function Code on which to conduct a search. Wildcard searching is available.

**Description**
Enter a Secured Function Code Description on which to conduct a search. Wildcard searching is available.

## Secured Function Enquiry Form




*Secured Function Enquiry Form*

**Secured Function Code**
This field displays the selected Secured Function Code.

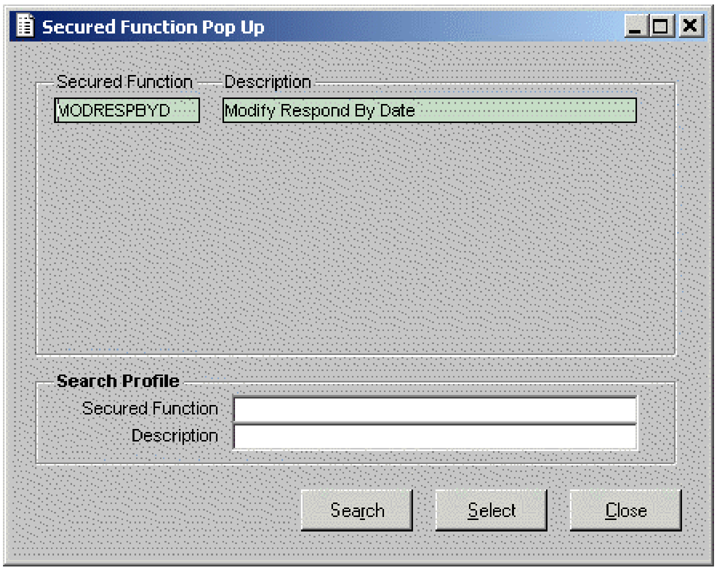
**Description**
This field displays the Secured Function Code Description.

**Active**
This flag will be checked on if this code is active and available for use.

## Secured Function Pop Up Form

This Pop Up displays all secured functions for selection.  The following Secured Function is available:

- MODRESPBYD – This Secured Function allows modification to the ‘Respond by Date’.

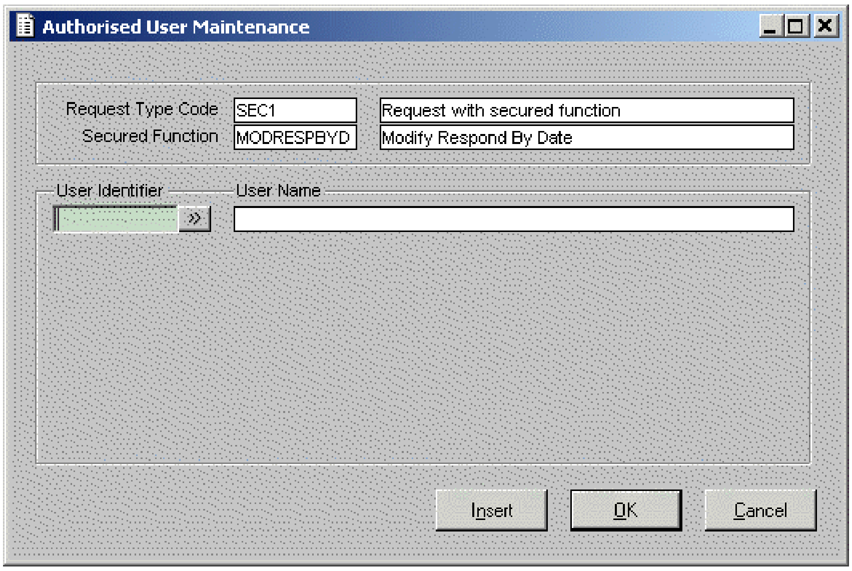



*Secured Function Pop Up Form*

**Secured Function / Description**
These fields display the Secured Functions which are available for selection along with their Descriptions.

**Search Profile – Secured Function / Description**
These fields allow a search profile to be entered on which to conduct a search.  Wildcard searching is available.  These fields are useful if there are more than nine records to search over.

## Authorised User Maintenance Form




*Authorised User Maintenance Form*

**Request Type Code**
These fields display the selected Request Type Code and Description.

**Secured Function**
These fields display the selected Secured Function.

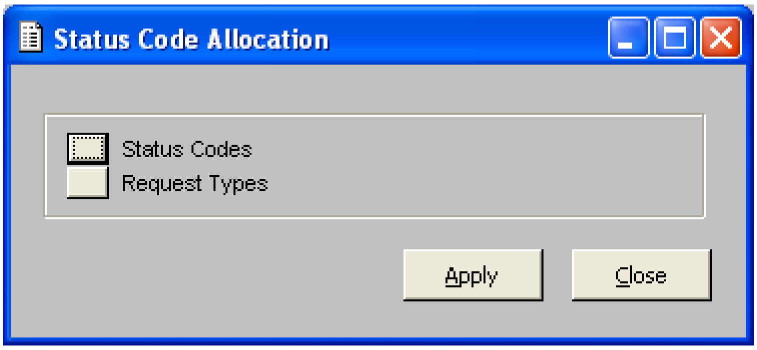
**User Identifier**
This field allows the user to select a User from the User Pop Up, or alternatively, keying one in.

**User Name**
This field displays the User Name associated with the User Identifier selected.

## Status Code Allocation

The Status Code Allocation form provides the ability to allocate one or more Status Codes to one or more Request Types. For selected Parent Request Types, it allows the user to apply the selected Status Codes to none, some or all of the Child Request Types for those Parents.

NOTE: This option will only be available if the authorised function 'Status Codes at Request Type Level' is authorised.




*Status code Allocation form*

**Status Codes Button**
When pressed, the [Status Codes] button will call the 'Status Codes Selected for Allocation' form. If one or more Status Codes has previously been selected, then the text beside this button will be in bold.

**Request Types Button**
When pressed, the [Request Types] button will call the 'Request Types Selected for Allocation' form. If one or more Request Types has previously been selected, then the text beside this button will be in bold.

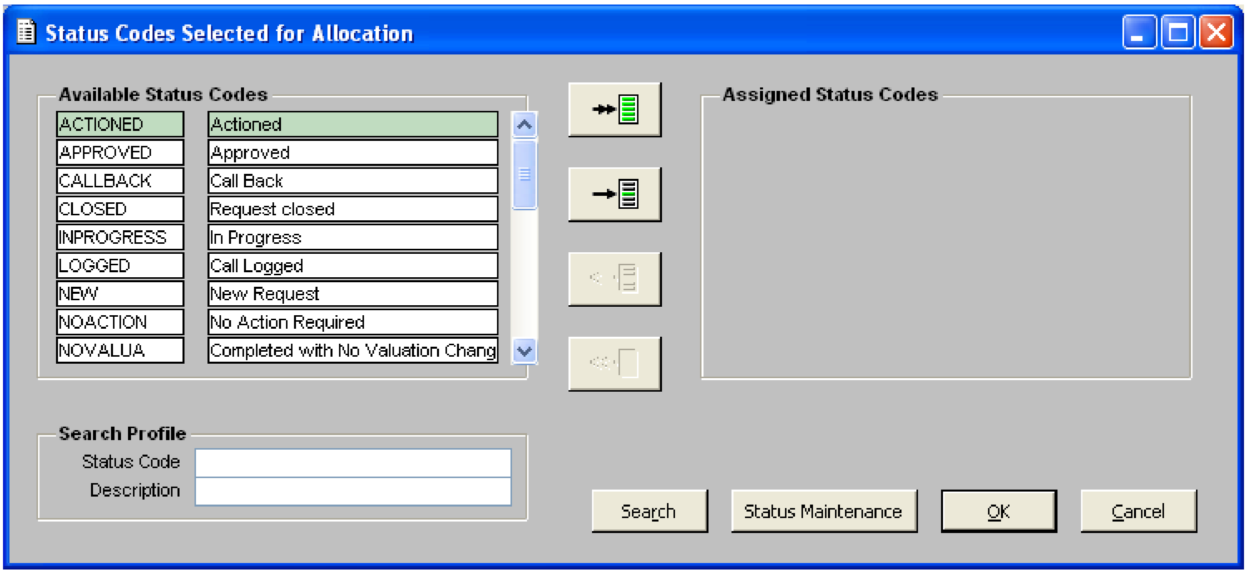
**Apply Button**
When pressed, and one or more Status Codes and one or more Request Types have been selected, it will add each of the selected Status Codes to each of the selected Request Types.

NOTE: See the 'Request Types Selected for Allocation' section below for how the selected Status Codes can be applied for Parent Request Types and their Child Request Types.

**Close Button**
When pressed, it will simply return to the menu. None of the selections (if any) will be applied.

## Status Codes Selected for Allocation

The Status Codes Selected for Allocation form is a select/remove form which allows one or more Status Codes to be selected for allocation to one or more Request Types.



*Status Codes Selected for Allocation form*

**Available Status Codes**
In the 'Available Status Codes' frame all Active Status Codes are shown – minus any that have already been moved to the 'Assigned Status Codes' list.

**Assigned Status Codes**
In the 'Assigned Status Codes' frame all Status Codes that have been selected are shown.

**Search Profile**
In the Status Code field, enter the full or partial code of the Status Code you wish to search for.
In the Description field, enter the full or partial description of the Status Code(s) you wish to search for.

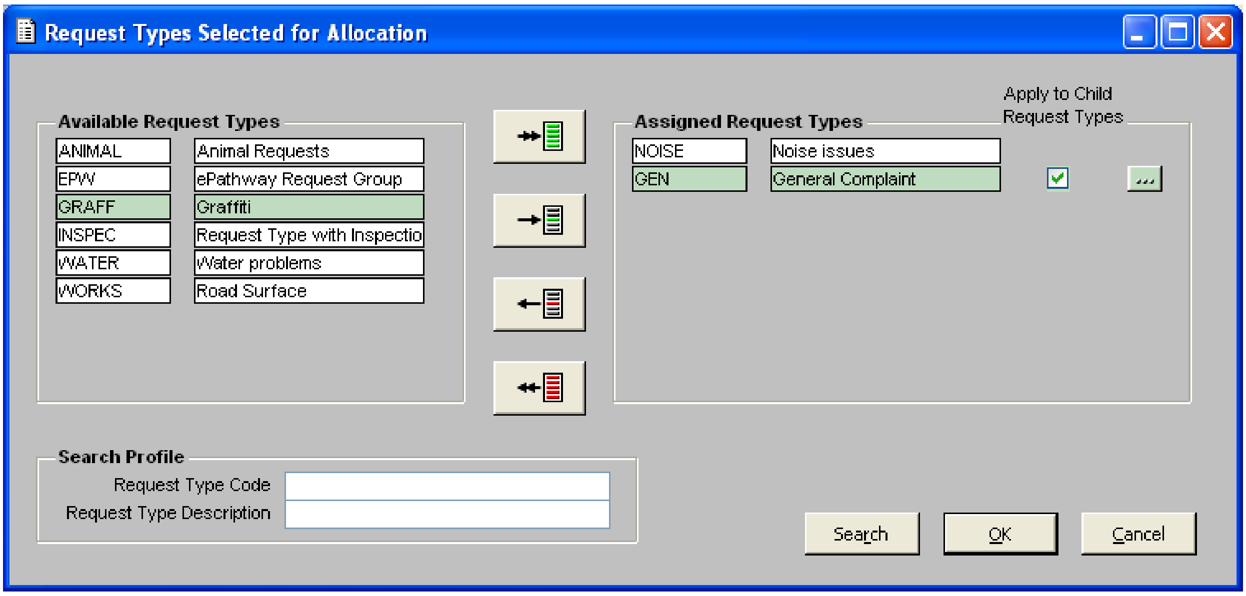
NOTE – Standard wildcard processing applies to both fields

**Search Button**
When pressed, this will filter the Status Codes that are displayed in the 'Available' frame using details entered in the 'Status Code' and / or 'Description' fields in the Search Profile frame

**Status Maintenance Button**
When pressed, the [Status Maintenance] button will call the existing Status Maintenance form which allows addition / maintenance / deletion of Status Codes. Upon return to the Status Codes Selected for Allocation form, any changes made will be evident and any new Status Codes added will now be available to be selected if desired.

## Request Types Selected for Allocation

The Request Types Selected for Allocation form is a select/remove form which allows one or more Request Types to be selected.




*Request Types Selected for Allocation form*

**Available Request Types**
All Request Types **excluding Child Request Types** are shown – minus any that have already been moved to the ‘Assigned Request Types’ list.

**Assigned Request Types**
All Request Types that have been selected are shown.

**Apply to Child Request Types**
This field is only visible and available for Parent Request Types.

- If OFF: The selected Status Codes will NOT be applied to any of the Child Request Types for this Parent Request Type
- If ON: It will make the […] detail button available.

The detail button  is only visible and available for Parent Request Types when the ‘Apply to Child Request Types’ checkbox is checked on.

When this button is pressed, it will display the ‘Child Request Types Selected for Allocation’ form (see below).

- If one or more Child Request Types are selected for this Parent, then the selected Status Codes will only be applied to the selected Child Request Types.
- If no Child Request Types are selected for this Parent, then the selected Status Codes will be applied to ALL Child Request Types for this Parent.

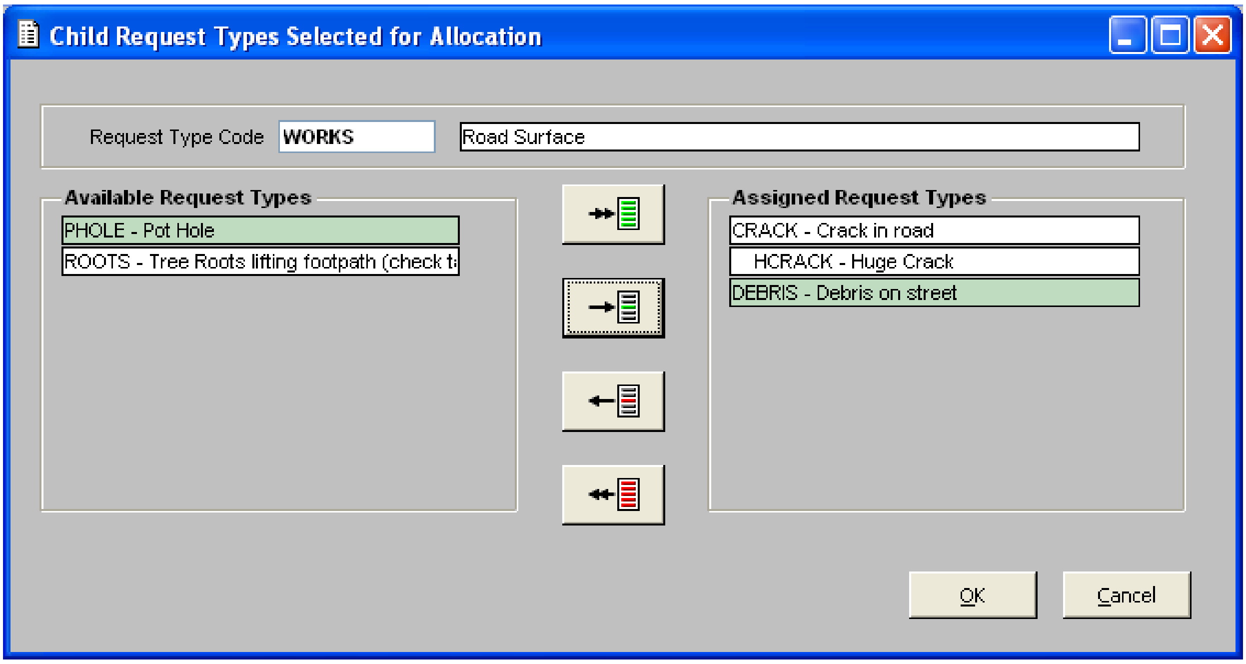
**Search Profile**
Enter the full or partial code of the Request Type Code you wish to search for.
Enter the full or partial description of the Status Code(s) you wish to search for.

NOTE – Standard wildcard processing will apply to both fields

When the Search button is pressed, this will filter the Request Types Codes that are displayed in the ‘Available’ frame using details entered in the ‘Request Type Code’ and/or ‘Description’ fields in the Search Profile frame

## Child Request Types Selected for Allocation

The Child Request Types Selected for Allocation is a select/remove form which will allow one or more Child Request Types to be selected for a selected Parent Request Type.




*Child Request Types Selected for Allocation form*

**Request Type Code**
The Request Type Code fields display details of the selected Parent Request Type.

**Available Request Types**
All Child Request Types and their entire hierarchy are shown – minus any that have already been moved to the ‘Assigned Request Types’ list.

**Assigned Request Types**
All Child Request Types that have been selected are shown.

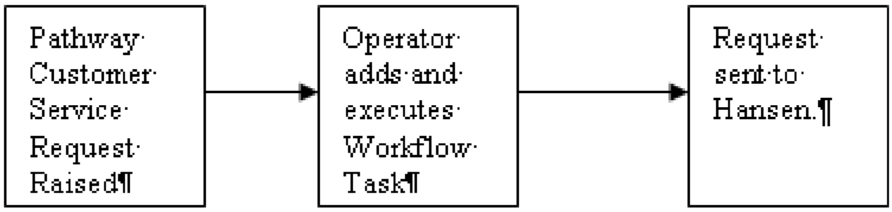
# Assets Management Interface

**Note**: This is a secured function. Authority is required for access to this function.

Pathway's Customer Service System provides the capability to link to a third party Asset Management System. (e.g. Hansen)

It allows Work Orders to be raised for a Council's Works Department via the Customer Service Centre. The Customer Service Staff will enter the details into Pathway Customer Service. When the operator entering the Request determines that the Request needs to be sent to the Works Department for action then the operator will add a Workflow Task to the Customer Service Request. When the task is executed it will initiate the process that will ultimately create an Asset Management (e.g. Hansen) request. The creation of the Asset Management request can only be initiated by the user creating and executing the specific Task against the Customer Service Request.

The Task will be defined by Council staff and will use a System action defined by Infor. This action will initiate the process that will result in an Asset Management request being created.




### Pathway Customer Service System Parameters

The Pathway Customer Service System Parameters will require the selection of the Asset Management Product to use.

An 'Asset Reference Type' will also be required to be selected. The Asset Reference Type will be used to record the Work Order number that was raised via the Asset Management product. The creation of this Reference will be automated when details are received from the Asset Management Product to indicate that a Work Order has been created for the Request.

### Pathway Customer Service Maintenance

Customer Service Request Maintenance will display the Work Order Number (if it has been created as a link) via 'References'. This allows Customer Service Operators to view the Work Order that was raised to deal with the Request. As there is no direct interactive link between Pathway and the Asset Management Product the option to detail out from the Pathway Customer Service Request and view the Asset Work Order is not available.

### Extracting data for the Asset Management Product

The transfer of information from Pathway to the Asset Management Product is performed via XML calls from Pathway to the Asset Management Product.

The information that is sent to the Asset Management Product is as follows::

| Field | Type | Comments |
|---|---|---|
| Customer Service Request Number | Numeric (7) | |
| Request Type | Character | Note that the Hansen codes are a maximum of 5 |

| | | |
|---|---|---|
| | | characters as opposed to 6 fro Pathway. |
| Request Type Description | Character (50) | |
| Responsible Officer | Character (20) | |
| Date\Time Request was logged | Combined Date\Time | |
| Date\Time Request is required to be actioned by | Combined Date\Time | |
| Name contact details (where they have been added to the Request). | Character | The Name details will be broken down into separate components, First Name and Surname. |
| *First Name* | Character (50) | Hansen will trim the string as required. |
| *Surname* | Character (50) | |
| *Contact Number* | | Default Contact details from Pathway Name and Address |
| *Customer Mailing Address* | | Customers Mailing Address |
| Property details (where they have been added to the Request) | | The Property Details will be broken down into separate components. |
| *Suburb Name* | Character (50) | |
| *Street Name* | Character (50) | |
| *Location Number* | Character | Records the house number of the property. E.g. 20A |
| Street\Suburb details (where they have been added to the Request) | | |
| *Street Location* | Character (50) | |
| *Suburb Location* | Character (50) | |
| Note details | Character | Unlimited length |
| Priority | | Priority details of the Request |

An 'Asset Maintenance Job Request' is available as a Task Action within Customer Service Work Flow. Customer Service Requests will have a Reference added for each Asset Request generated. The Reference will provide a link between the Customer Service Request and a Job Request.

The Asset Management System may use any type of Interface Protocol (e.g. DDE, COM, or via the Pathway database).

The Workflow Task that provides the Job Request may be deleted at any time without affecting the Job Request.

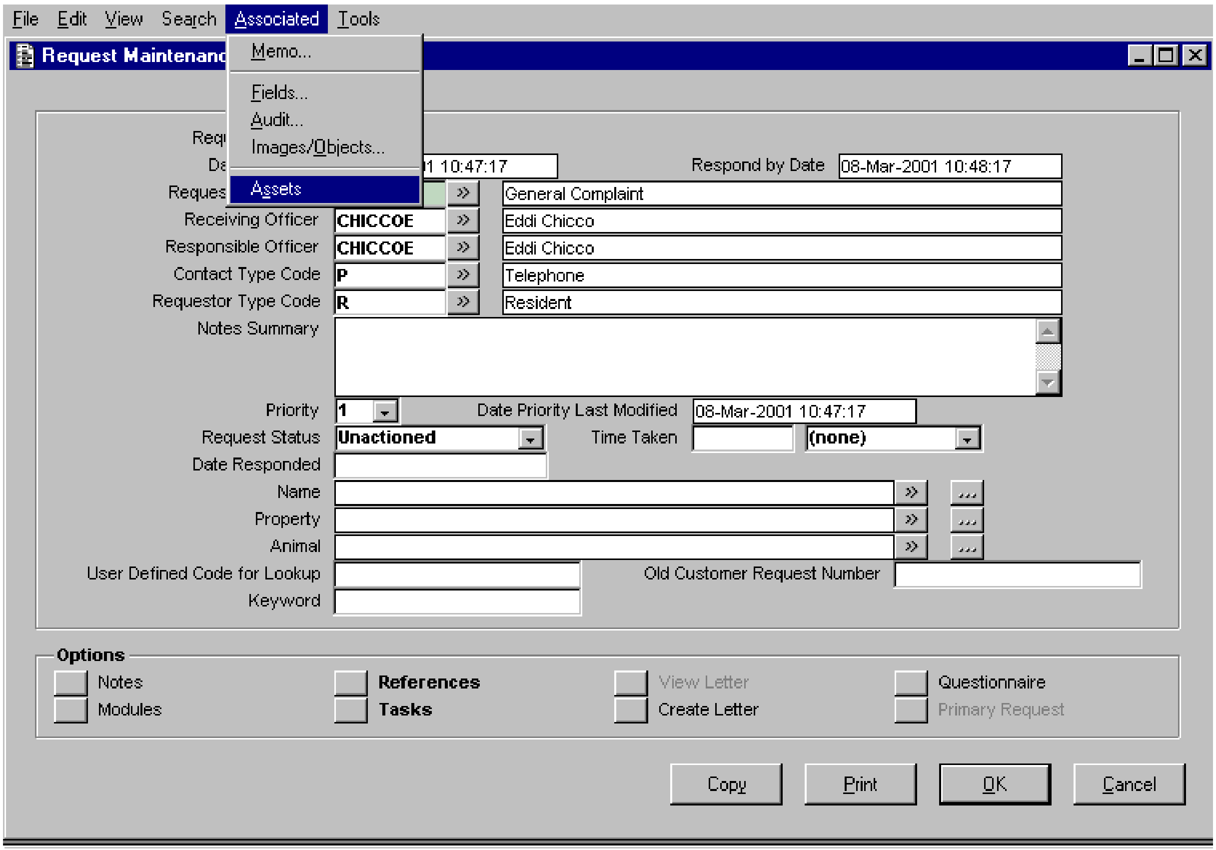
The Job Request is able to be displayed from the Customer Service Request. The Customer Service Request is able to be displayed from the Job Request.

A Workflow Task Type may have many Actions (each of which may contain an Asset Request). Each Workflow Task is of a Task Type. Each Customer Service Request may have many Tasks. Tasks against a Customer Service Request may consist of multiple Tasks of the same Task Type. This means that there may be multiple Job Requests held against the same Customer Service Request.

The following details from Customer Service are sent across to the Job Request:

| Customer Service Fields | Assets Management Fields populated |
|---|---|
| Request Type | Job Description |
| Responsible Officer | Responsibility |
| Request Number | Requisition Number |
| Date Received | Reported Date |
| Respond By Date | Scheduled Date |

The 'Assets' Menu Option is available from the Customer Service Request Form, accessed via the 'Associated' Menu (when the Customer is licensed to use it).
e.g.




**Customer Service Maintenance**

To create an Asset Management Job Request the following procedure may need to be followed:

a. A request is received by council and recorded in Customer Service.
b. An assessment is made and it is determined that a job order is required in the Asset Management Product
c. The Task Type that has been defined to create a Work Order will be created as a Task against the Customer Service Request and executed.
d. The Task is executed which will call the Asset Management Product to create the Work Order

The ability to access the Work Order is available by accessing the “Assets” menu option in the “Associated” menu bar dropdown.

The following rules apply to interactions between Customer Service and an Asset Management Product.

***If the task that initiates the Work Order is deleted then no action will be taken in Pathway Customer Service or the Asset Management product.***

If a Work Order is not created in the first instance when the Asset Management product is called then the action against the Task will still be completed. If the user wishes to initiate another call to the Asset Management product to raise a Work Order then a new Task will need to be added against the Customer Service Request.

A Pathway Customer Service Request could have many Work Orders linked, but a Work Order will only ever be linked to one Pathway Customer Service Request.

If the Work Order is deleted then no action will be taken in Pathway Customer Service. (i.e. any References created will remain.). If an attempt is made to display the Work Order that has been deleted then an error message should be displayed in the Asset Management product indicating that the Work Order no longer exists. This function is required to be handled by the Asset Management product.

If the Pathway Customer Service Request is deleted then no action will be taken in the Asset Management product. If the Asset Management product attempts to display the Request, then an error message will be displayed indicating that the request no longer exists. This function will be handled by Pathway.

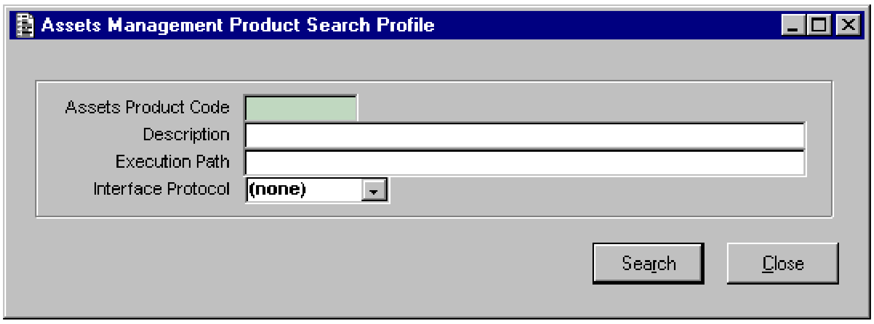
The Asset Management product needs to return the Work Order number to Pathway Customer Service to enable the Reference details to be created. This allows users to access the Work Order from Customer Service. This number can be alpha numeric with a maximum length of 25 characters.

The Asset Management product is able to access the Pathway Customer Service Request in “read” only mode. A Pathway session needs to be active for this to occur.

See details specific to the Hansen Asset Management System.
See details specific to the AssetMaster Integration.

## Assets Management Search Profile Form

The Assets Management Search Profile allows searching over the available Assets Management Products.




*Assets Management Search Profile Form*

### Assets Product Code

This field allows an Assets Product Code to be entered on which to base your search.

### Description

This field allows a Description of the Assets Product to be entered on which to base your search.

### Execution Path

This field allows a path to the Assets Management Product executable file to be entered on which to base your search.

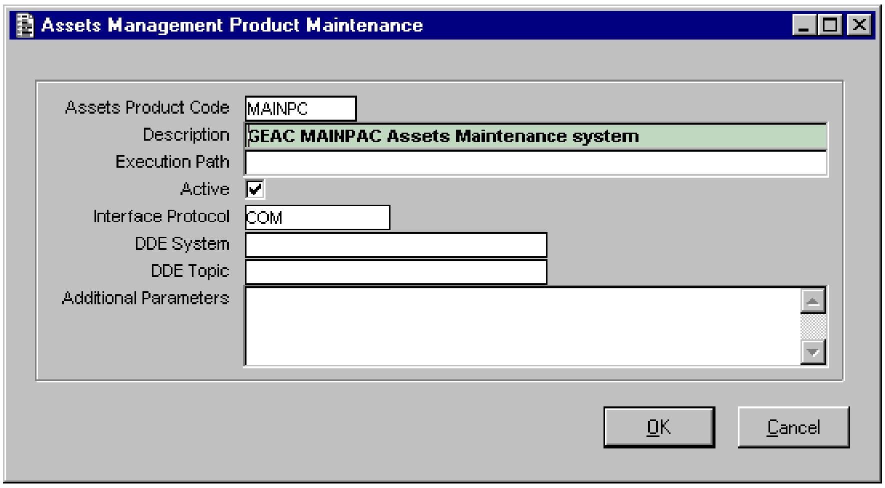
### Interface Protocol

This field allows an Interface Protocol to be entered on which to base your search. The available options are as follows:

- (none)
- COM
- Database
- DDE.

## Assets Management Product Maintenance Form

This form displays details of the Assets Management Product, and allows maintenance of several fields.




*Assets Management Product Maintenance Form*

**Assets Product Code**
This field displays the Assets Product Code. This field is display only and cannot be maintained.

**Description**
This field displays a Description of the Assets Product. This field is maintainable.

**Executable Path**
This field allows a path to be entered, if necessary, to the Assets Management Product executable file.

**Active**
Check this flag on to make the Assets Management Product active.

**Interface Protocol**
This field displays the Interface Protocol i.e. COM, Database or DDE.

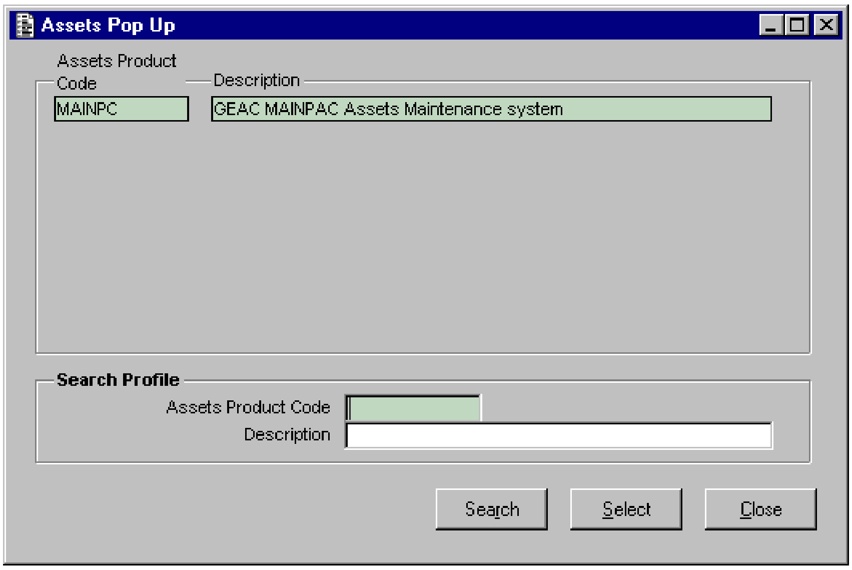
**DDE System**
If DDE is the Interface Protocol, this field displays the DDE System.

**DDE Topic**
If DDE is the Interface Protocol, this field displays the DDE Topic.

**Additional Parameters**
This allows Additional Parameters to be entered.

## Assets Pop Up Form

The Assets Pop Up form allows selection of an Assets Maintenance Product to include in Customer Service System Parameters.




*Assets Pop Up Form*

**Assets Product Code/ Description**

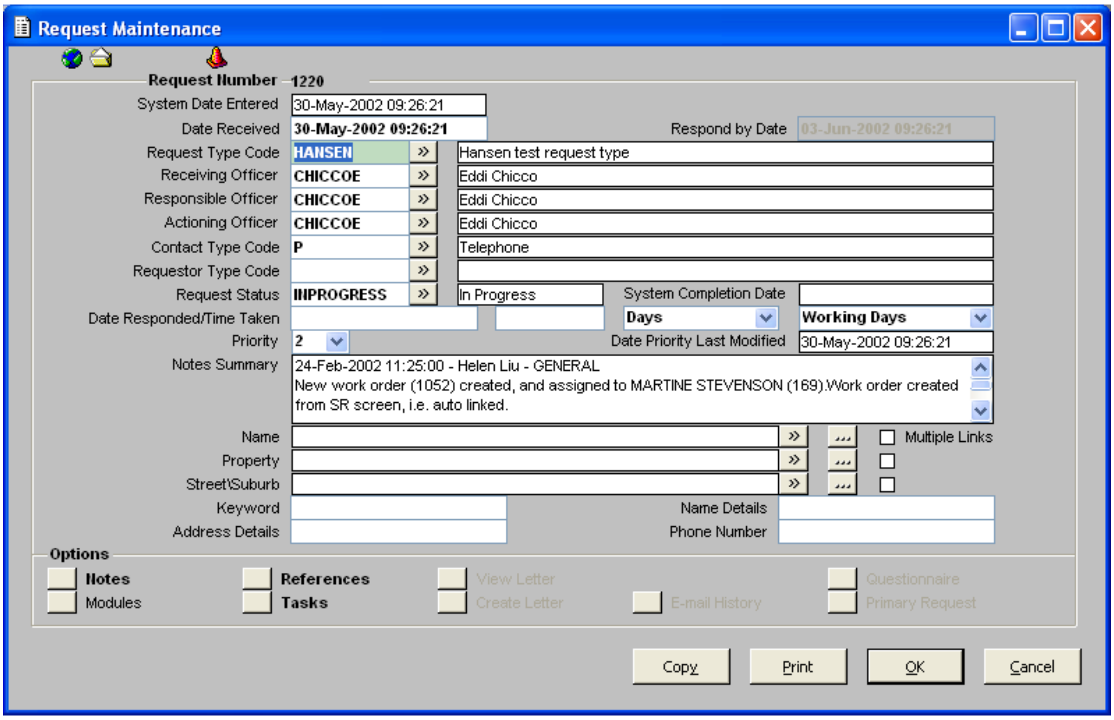
These fields display any Assets Products which have been set up for selection. Highlight the required record and press the 'Select' button.

**Search Profile - Assets Product Code/Description**

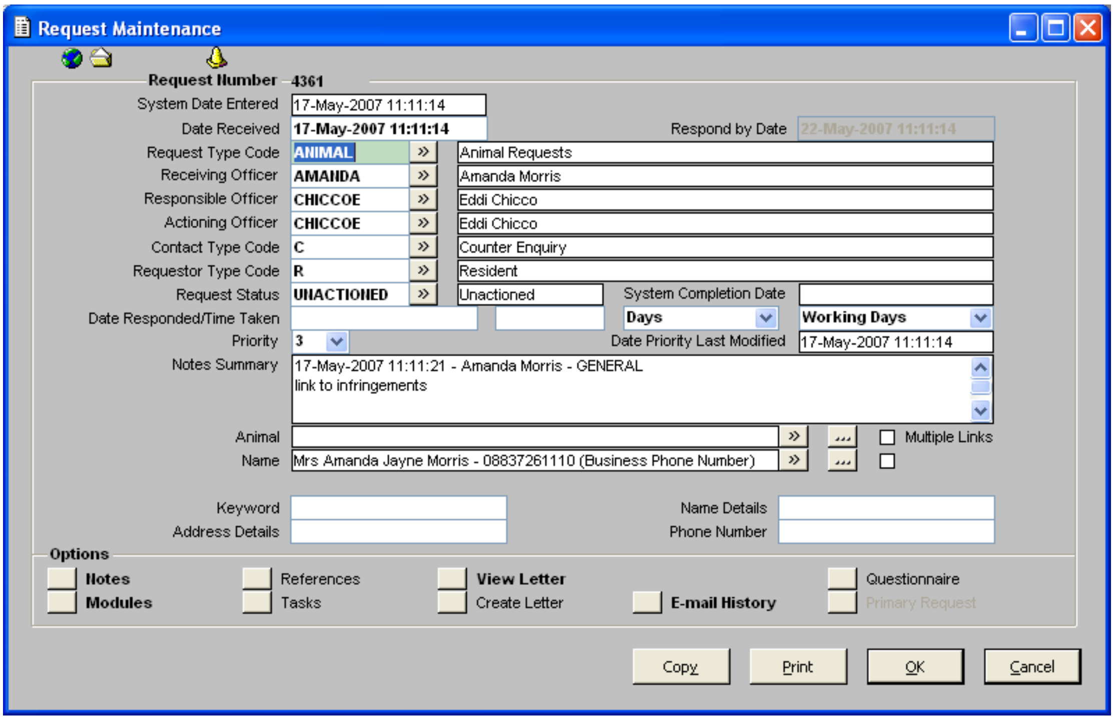
These fields allow searching for an Assets Product based on the Code and/or Description. The Search Profile is useful when there are more than 9 occurrences. Wildcard searching is available in these fields.

## Hansen Asset Management System Hot Link from Request Maintenance/Enquiry

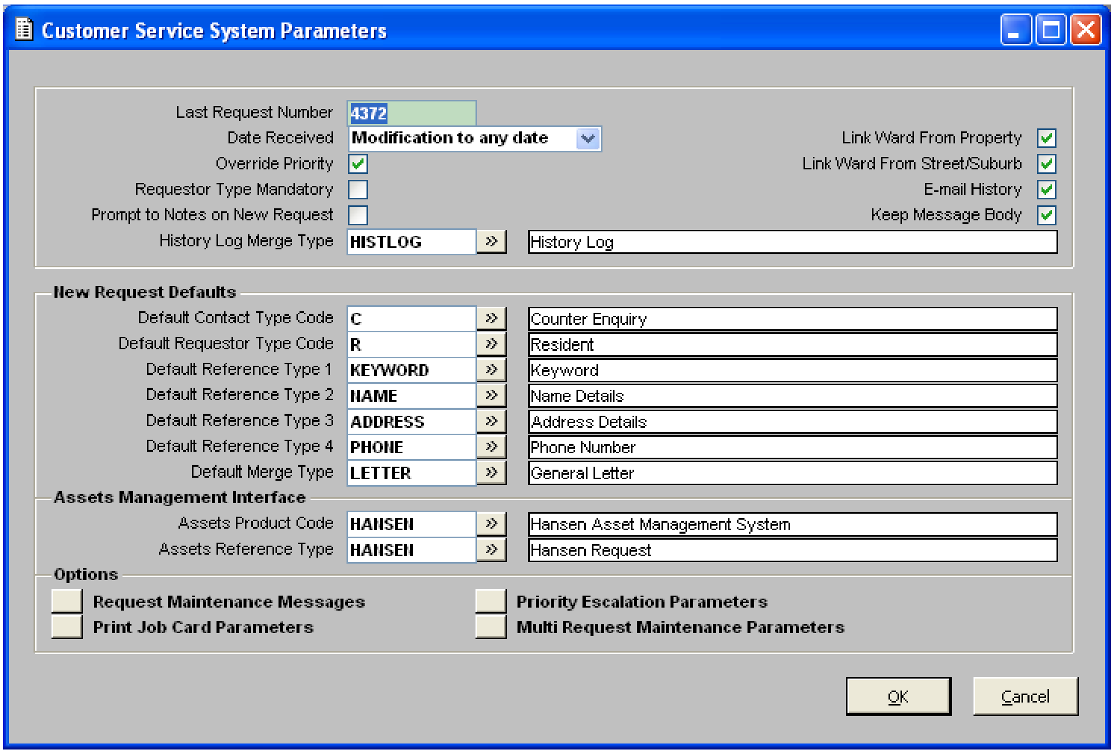
This is an enhancement for when using Hansen Asset Management System. It allows a URL hot link to be displayed in Pathway Customer Service system. The glyph is a Witches Hat as shown below. It is red in colour if a Hansen Request has been created.




… and it is yellow in colour if a Hansen Request has not been created.

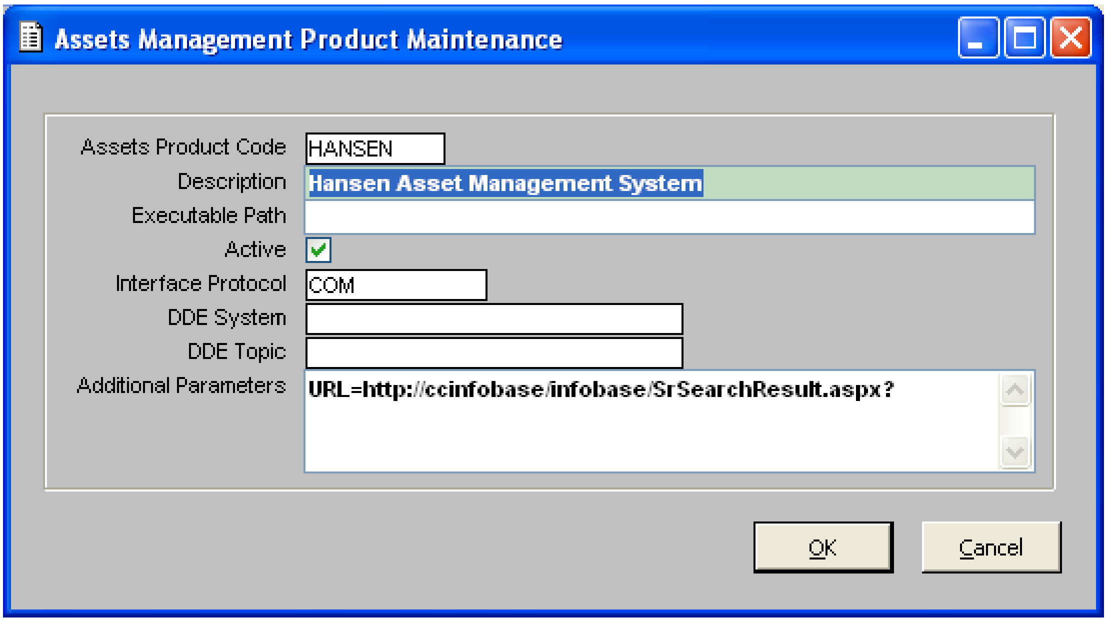



The user is aware that a Hansen Request has been created when there is a Reference for the Reference Type specified in the Customer Service System Parameters for the Assets Reference Type.




If the glyph is red or yellow and the user clicks on it then a parameter defined URL will be opened and the relevant Hansen record displayed via a Web form.

The parameter defined URL needs to be defined in the Additional Parameters for Assets Product Code ‘HANSEN’ in Menu Option ‘System Administration >> Customer Service >> Asset Management Product Maintenance’ as follows:




Using the above information the URL will be:
http://ccinfobase/infobase/SrSearchResult.aspx?SERVNO=1220

The SERVNO is the Customer Service Request Number.

# DynaRep Call Manager Interface

**Note**: This is a secured function. Authority is required for access to this function.

**Pathway Dynarep Call Manager Log On**

The DynaRep for NT Call Manager is supported directly by Pathway. This feature permits the user to Log On to the DynaRep Server directly from Pathway. Once logged on the user can then have the Pathway session minimise itself and "Wait for a Call". When an incoming call for the user's extension is detected, the minimised Pathway session will automatically activate and show the user a Name and Address selection form with selections initially based on the incoming phone number. The user can then select a customer from the displayed list, or enter a new search profile, or create new Name and Address details for the caller if necessary. Once a selection has been made, the Customer Services Request Entry will be shown for the user to deal with the customer's call. Upon completion of the call, the user need only close Request Entry to have the process return to its "Wait for a Call" status.

This option is accessed via [Customer Service] [Call Identifier Entry] [Pathway/DynaRep Call Manager Log On].

**Pathway Dynarep Call Manager Shutdown**

Once running the Pathway/DynaRep Call Manager session will not be accessible to the user until it is activated by an incoming call. Therefore it is necessary for a separate menu option to provide a mechanism to interrupt the "Wait for a Call" status of the Call Manager session. By selecting this option, and selecting to interrupt the active Call Manager, the minimised session will automatically activate, giving the user the opportunity to Log Off and end the Call Manager, or to return to the "Wait for a Call" status.

This option is accessed via [Customer Service] [Call Identifier Entry] [Pathway/DynaRep Call Manager Shutdown]

**Pathway Dynarep Name Extraction**

This option must be run to initially populate the extract table (CIFARIS) that the Call Manager uses to lookup incoming phone numbers. The form allows for the selection of multiple Communication Types that will be used to extract the associated names. It is also very important that a "System Default" be logged for this option. Once this has been done the name and Address maintenance modules will keep this extract table up to date in 'real time', thereby ensuring that the phone number lookup will always be up to date.

This option is accessed via [Customer Service] [Batch Functions] [Call Identifier Name Extraction].

## Windows PC Setup for Pathway/DynaRep Call Manager Interface

Introduction.

The Pathway to Aristacom Interface has been implemented using Line4's product DynaRep for NT. This is a Windows NT based Server solution providing connection to a CTI Switch. Client software is provided by Line4 to permit communication with the Server by Applications such as Pathway.

It uses the Windows Dynamic Link Library DynaRep Client which allowed implementation of a 3GL interface between Pathway and the DynaRep Client DLL. This 3GL interface has been added to the existing Pathway "W32File.dll" which is a standard part of the Pathway installation. However it is worth noting that anyone attempting to implement the Pathway/DynaRep Call Manager must have version 1.17 or higher of the W32File.dll object. This DLL can be found in the Pathway application directories on your Server.

Local Windows object requirements.

The DynaRep Client DLL is called AIICDRDL.DLL. Anyone attempting to implement the Pathway/DynaRep Call Manager must ensure that they have version 7.3.0.7 or later of the AIICDRDL.DLL object.

The DynaRep Client DLL, AIICDRDL.DLL, must be installed in the Windows <System> directory of any PC's intending to use the Pathway/DynaRep Call Manager.
- On Windows NT this will normally be C:\WINNT\SYSTEM32.
- On Windows9x this will normally be C:\WINDOWS\SYSTEM.
Ensure that the AIICDRDL.DLL object exists in these directories and that it is of at least the version described above.

Copy the DLL into the Windows <System> directory on the client PC.
E.g.: X:\Prod\Fix\02100860\New\AIICDRDL.DLL copy to C:\WINNT\SYSTEM32
(Where X: is the appropriate mapped Server Drive Id)

PC Environment Setup/Requirements.

The Pathway/DynaRep Client uses standard Windows TCP/IP facilities for communication with the Aristacom/DynaRep Server. Therefore any PC to be used with the Call Manager Interface must be configured for TCP/IP, and must have a unique TCP/IP Computer Name.

The Computer Name for those PC's that are to use the Call Manager must be eight characters or less in length, and the name must be able to be resolved by the Aristacom/DynaRep Server. This implies an active TCP/IP Name Server being available on the network.

The Pathway/DynaRep Client uses Windows "Environment Variables" to obtain some configuration data. Some variables are mandatory, whilst others are optional.

***Table of "System Level" Environment Variables.***

*Note: Only Windows NT provides for "System" variables. For Windows only one set of variables will be able to be defined.*

*In the following table the recommended values are in* **bold** *text.*

| **Variable Name** | **Mandatory?** | **Description** |
|---|---|---|
| AILOGDRDL | Yes | Full path name for the DynaRep Client Log File<br>E.g.**: C:\AIICDRDL_LOG.TXT** |
| AITRCDRDL | Yes | Full path name for the DynaRep Client Trace File<br>E.g.**: C:\AIICDRDL_TRC.TXT** |
| AIMAXPORT | Yes | Number of Client Ports to allocate.<br>Set this to **1** |
| AIMSGTYPE | Optional | The default Message Type to use when 'Waiting for a Call'<br>0211 = Synchronous processing.<br>(Minimum timeout/delay of 6 seconds)<br>**0212** = Asynchronous processing (the Default)<br>(Maximum timeout/delay of 5 seconds) |
| AITIMEOUT | Yes | The Timeout value for calls to the DynaRep API (milliseconds)<br>For Message Type 0211 set between 6000 and 60000<br>For Message Type 0212 set between 500 and **3000**<br>(This value is the amount of time that the Pathway Call |

| Variable Name | Mandatory? | Description |
|---|---|---|
| | | Manager will wait between each query sent to the DynaRep Server to check for incoming calls.) |
| AISERVER | Yes | The TCP/IP Address or Host Name of the Aristacom/DynaRep Server |
| AIPORT | Yes | The TCP/IP Port Number on which the Aristacom/DynaRep Server is listening.<br>Normally this will be **7501** for DynaRep for NT. |

***Table of "User Specific" Environment Variables.***

*Note: Only Windows NT provides for "User Specific" variables. For Windows only one set of optional variables will be able to be defined.*

(All of the following variables are optional. The user will be able to overtype any values during Log On)

| Variable Name | Mandatory? | Description |
|---|---|---|
| AIAGENTACD | Optional | The default ACD Group Phone Number for this User |
| AIAGENTID | Optional | The default ID Number for this User |
| AIAGENTEXTN | Optional | The default Telephone Extension Number of this User. |

Setting up Environment Variables.

Defining these environment variables is different based upon the Windows version in use. For Windows NT the variables are defined using the "My Computer >> Properties >> Environment" options tab, whereas for Windows9x it is necessary to edit the "AUTOEXEC.BAT" startup file to have the variables set during each Windows startup.

***Definition of variables for Windows NT***
*Note: Depending on the security setup of the Windows NT PC it may be necessary for the "Administrator" to perform the setup of the 'System Level' variables. While the 'User Specific' variables should be available to the individual User. The following instructions assume you have access to both sets of values.*

- Right Click on the "My Computer" icon on the Desktop.
- Select 'Properties' from the list of options.
- Select 'Environment' from the Properties dialog/display.

You should see the dialog split into two groups of variables. The top list are the 'System' variables, whilst the bottom list are the 'User' variables.

**Setting 'System' variables:**
a) Click on the scroll bar of the 'System' variables list, and scroll to the very end.
b) You should now see a 'blank' entry at the bottom of the list. Double click on this blank entry.
c) Now click on the 'Variable' edit box at the bottom of the dialog, and enter the name of one of the required 'System' variables (enter this in UPPER case).
d) Now tab down to the 'Value' edit box and type in the value for the 'System' variable.
e) Now, click the 'Set' button to add this 'System' variable.
f) Repeat steps (c) to (e) for each of the 'System' variables in the table above.
g) Finally, click the 'Apply' button.

**Setting 'User' variables:**

a) Click on the scroll bar of the ‘User’ variables list, and scroll to the very end.
b) You should now see a ‘blank’ entry at the bottom of the list. Double click on this blank entry.
c) Now click on the ‘Variable’ edit box at the bottom of the dialog, and enter the name of one of the required ‘User’ variables (enter this in UPPER case).
d) Now tab down to the ‘Value’ edit box and type in the value for the ‘User’ variable.
e) Now, click the ‘Set’ button to add this ‘User’ variable.
f) Repeat steps (c) to (e) for each of the ‘User’ variables in the table above.
g) Finally, click the ‘Apply’ button.

***Definition of variables for Windows x***

Defining Environment Variables under Windows 9x requires ‘SETting’ these variables from the DOS AUTOEXEC.BAT startup batch file.

Open a DOS Command Prompt
Enter the command: EDIT C:\AUTOEXEC.BAT
Note that this file might not exist on all PC’s. In any event the DOS Edit screen should be displayed.
Add the following command statements to the very top of the file.

Press ENTER at the end of each line.

@ECHO off
SET AILOGDRDL=C:\AIICDRDL_LOG.TXT
SET AITRCDRDL=C:\AIICDRDL_TRC.TXT
SET AISERVER=**NT_SERVER**
SET AIPORT=**7501**
SET AIMSGTYPE=0212
SET AITIMEOUT=3000
SET AIMAXPORT=1

SET AIAGENTACD=**0812345000**
SET AIAGENTID=**25**
SET AIAGENTEXTN=**179**

**Replace the highlighted ‘Values’ above with the correct values for your PC and installation.**

Now, press ALT-F, and select ‘Save’. Then press ALT-F again and select ‘Exit’

It is now necessary to re-start the Windows 9x PC. Perform a shutdown and re-start. The new Environment Variables will now be active.

For either Windows NT or Windows 9x you can verify that the Environment Variables have been applied by opening a DOS Command Prompt, and typing the following command:

SET | MORE

If any of the variables are missing, or incorrect, just go back through the instructions above to verify what has been done.

**Summary.**

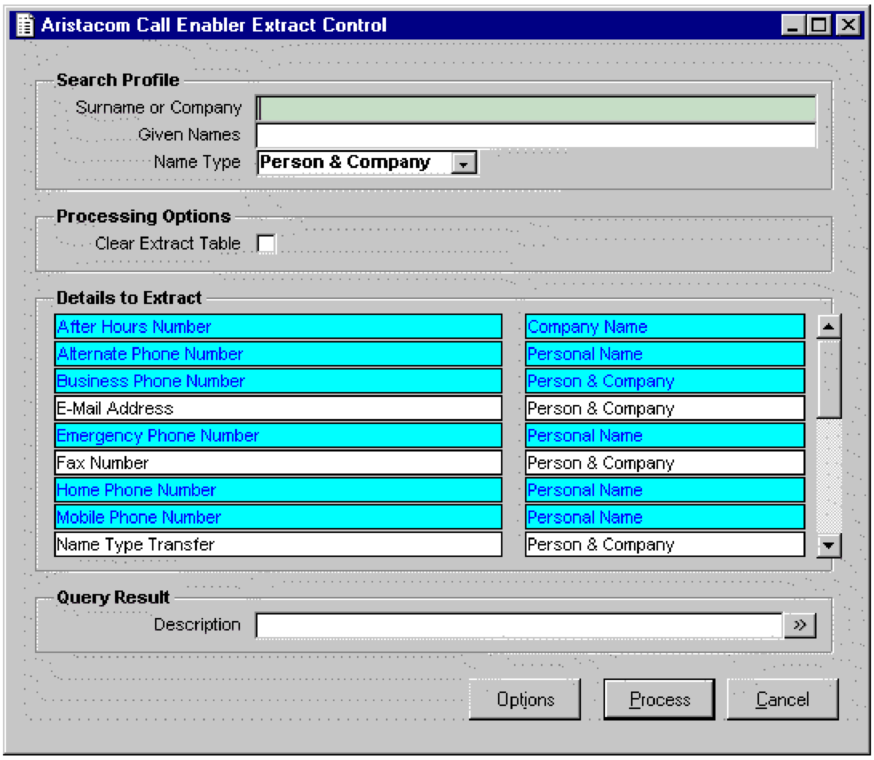
This completes the setup requirements for a PC to make use of the Pathway/DynaRep Call Manager Interface. The user should now be able to ‘Log On’ to the Aristacom/DynaRep Server and begin receiving incoming call notifications.

This setup will only be necessary on those PCs that are to make use of the Call Manager.

## Aristacom Call Enabler Extract Control Form

This form displays when the Call Identifier Name Extraction option is selected from the Customer Service Batch Functions Menu.

This option must be run to initially populate the extract table (CIFARIS) which the Call Manager uses to lookup incoming phone numbers. The form allows for the selection of multiple Communication Types that will be used to extract the associated names. It is also very important that a “System Default” batch Option be logged for this option. Once this has been done the Name and Address Maintenance modules will keep this extract table up to date in ‘real time’, thereby ensuring that the phone number lookup will always be up to date.




*Aristacom Call Enabler Extract Control Form*

### Surname or Company

This field allows entry of a Surname or Company name over which to create the extract table. To include all names, then this field should be left blank.

### Given Names

This field allows entry of a Given Name/s over which to create the extract table. To include all names, then this field should be left blank.

### Name Type

Make a selection from the dropdown list. To include all Name Types, select Person and Company. The available options are as follows:

- Company Name
- Personal Name
- Person and Company

### Clear Extract Table

Check this box on if you wish to clear the extract table before performing the extract.

### Details to Extract

These fields display the available Communication Type details. Highlight the details you wish to extract. This will usually be any Telephone Number details, e.g. Home Phone Number, Business Phone Number etc. Multi-selection is available by using the SHIFT or CONTROL keys while making the selections.

**Query Result Description**
A Query Result may be used to perform the extract. The Query must be set up initially within the Query module. If a Query is used then other search profiles will not be used.

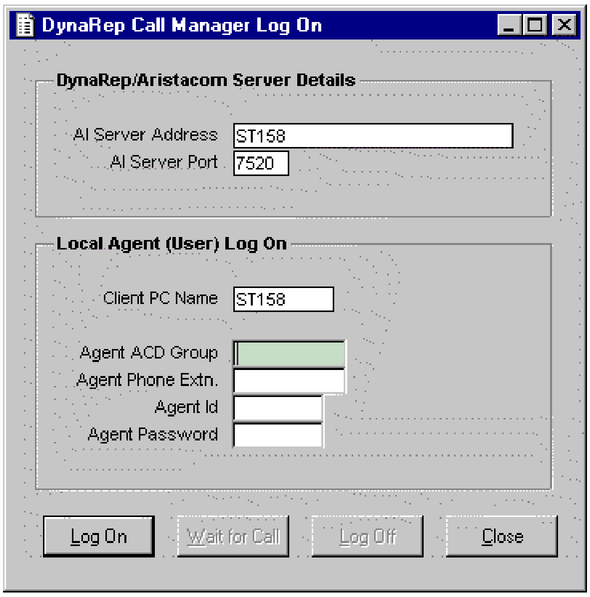
## DynaRep Call Manager Logon Form

The form is accessed when the [Call Identifier Entry] [Pathway-DynaRep Call Manager Log On] options are selected from the Customer Service Menu.

The Log On form allows the user to modify the defaults and then log on to the Aristacom Server. If the log on is successful then additional buttons will be made available to allow the user to set the application into the 'Wait for Call' status, or 'Log Off' and 'Close'.

Once logged on the application session will be minimised.

When a valid Incoming message response is received a 'Waiting for Incoming Call' dialog message will display briefly and the DynaRep Call Manager Name Selection form will display showing details of the Phone number and the selected Name.



*DynaRep Call Manager Log On Form*

**AI Server Address**
This field displays the TCP/IP Address or Host Name of the Aristacom/DynaRep Server. This value is defaulted into the field and cannot be maintained here.

**AI Server Port**
This field displays the TCP/IP Port Number on which the Aristacom/DynaRep Server is listening. Normally this will be 7501 for DynaRep for NT. This value is defaulted into the field and cannot be maintained here.

**Client PC Name**
This field displays the Client PC Name. This value is defaulted into the field and cannot be maintained here.

**Agent ACD Group**
This field allows a default ACD (Automatic Call Distribution) Group Phone Number to be entered for the user. The user is able to overtype any value during Log On.

**Agent Phone Extension**

This field allows a default Telephone Extension Number to be entered for the user. The user is able to overtype any value during Log On.

**Agent Id**

This field allows a default ID number to be entered for the user. This value must be numeric. The user is able to overtype any value during Log On.

**Agent Password**

This field allows entry of an Agent Password (PIN). This value must be numeric

**Log On Button**

This button allows the user to make a connection to the DynaRep Call Manager. If connection is successful the Agent data entry fields become dimmed and the 'Wait for Call' and 'Log Off' buttons will become available.

**Wait for Call Button**

This button will become available if connection to the DynaRep Call Manager has been made by selecting the 'Log On' button. When the 'Wait for Call' button is selected, a dialog box saying "Waiting for a Call….' will be displayed briefly, after which the active session will minimise to the Windows Task Bar.

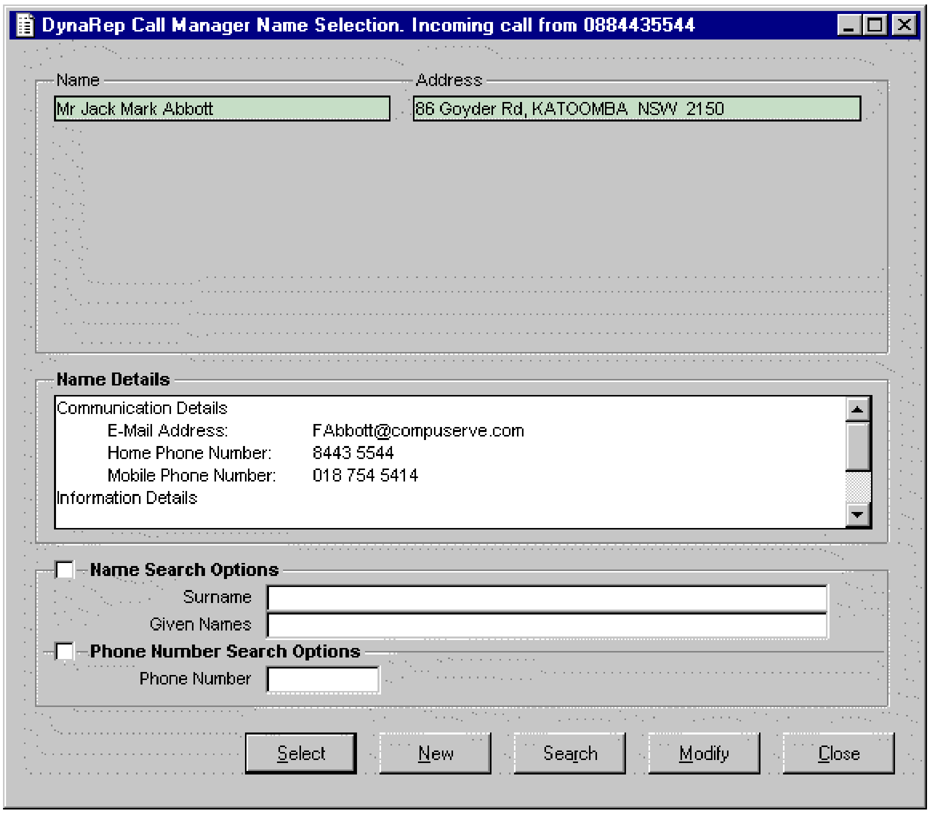
**Note**: You will not be able to bring this session to the foreground once it has gone into this 'Wait for Call' state.

**Log Off Button**

Selecting the Log Off button will disconnect the DynaRep Call Manager. The Agent Data entry fields will then become available once more and the 'Wait for Call' and 'Log Off' buttons will become dimmed.

## DynaRep Call Manager Name Selection Form

The DynaRep Call Manager Name Selection form will display once a phone call is received. If the phone number of the incoming call finds a match in the Extract file, it will display a name/list of names on this form. If no match is found, then a blank form will display, allowing the user to conduct a manual search. The user may then select a name from the list to include in the Customer Request.




*DynaRep Call Manager Name Selection Form*

### Name and Address

These fields contain Name and Address details for the Communication Type details (phone numbers) matching the incoming phone number.

### Name Details

This summary box contains further details relating to the name which has focus.

### Name Search Options

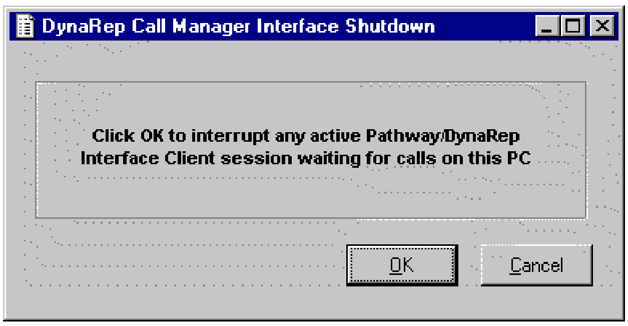
A Surname and/or Given Name may be entered in these fields on which to conduct a search.

### Phone Number Search Options

A Phone Number may be entered in this field on which to conduct a search.

## DynaRep Call Manager Interface Shutdown Form

This form displays when the Pathway/DynaRep Call Manager Shutdown option is selected from the Customer Service Menu.




*DynaRep Call Manager Interface Shutdown Form*

# GIS Interface

**Note**: GIS Interfacing is an authorised function. This means GIS Interfacing will only function if you are authorised to use it.

The user interface for GIS functionality within Pathway is accessed by a glyph represented by a picture of a world on various forms and a Display on GIS menu option located in the Associated menu.

GIS User security is available (a menu option in the Property module) to control security for GIS functions by user.  By default, no users will have access to GIS so this must be set up before anyone will be able to use the GIS interfacing capabilities of Pathway.

Wherever the picture of the world appears on a Pathway form, it can be double clicked to perform the Display on GIS action.

The GIS References are maintained within the Property module.

GIS functionality is available within the following Pathway modules in addition to the Property module: Customer Service, Animals, Applications, Licensing, Infringements and Rates/Water Billing.

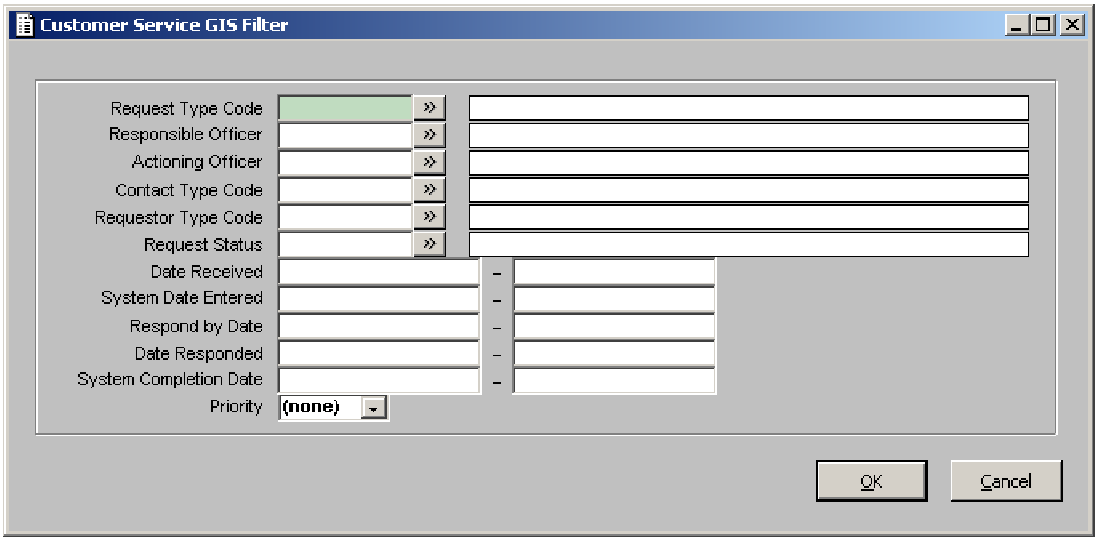
The GIS functionality in these additional Pathway modules is only available where the item is linked to a Property, Title, Parcel and/or Street.

The user interface for GIS functionality within each of these modules is consistent with the Property module with a GIS button appearing on the Search form, selection form and the picture of the world on other relevant forms including the summary form.

The Display Query on GIS menu option is located within the Query menu.  This function allows Pathway queries to be displayed for all the main entities of all the additional GIS modules as well as the existing Property entities.

## Customer Service GIS Filter Form

The Customer Service GIS Filter  form displays when the 'Show in Pathway' button is selected from the GIS Product and the Customer Service option is subsequently selected from the GIS Application Selection form.  It allows further filtering within Customer Service.




*Customer Service GIS Filter Form*

### Request Type Code

Enter a Request Type Code or, alternatively, select one from the Pop Up, on which to filter your search.

**Contact Type Code**

Enter a Contact type Code or, alternatively, select one from the Pop Up, on which to filter your search.

**Requestor Type Code**

Enter a Requestor Type Code or, alternatively, select one from the Pop Up, on which to filter your search.

**Responsible Officer**

Enter a Responsible Officer or, alternatively, select one from the Pop Up, on which to filter your search.

**Actioning Officer**

Enter an Actioning Officer or, alternatively, select one from the Pop Up, on which to filter your search.

**Request Status**

Enter a Request Status or, alternatively, select one from the Pop Up, on which to filter your search.

**Date Received**

Enter a valid Date/Time Range on which to filter your search by Date Received.

**System Date Entered**

Enter a valid Date/Time Range on which to filter your search by System Date Entered.

**Respond By Date**

Enter a valid Date Range on which to filter your search by Respond By Date.

**Date Responded**

Enter a valid Date Range on which to filter your search by Date Responded.

**System Completion Date**

Enter a valid Date/Time Range on which to filter your search by System Completion Date.

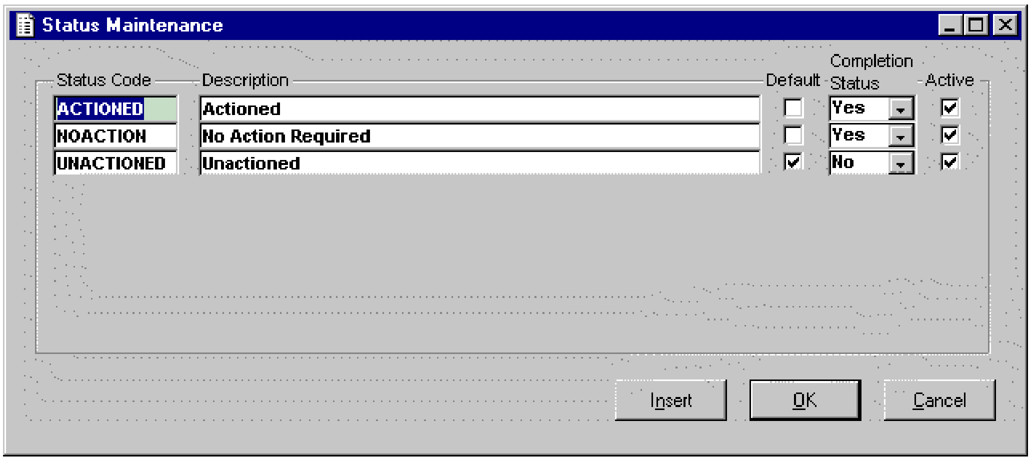
**Priority**

Select a Priority from the dropdown list on which to filter your search.

# Request Status Maintenance

## Status Maintenance Form

This form allows user-defined Request Statuses to be set up. There are also 3 system defined Request Statuses, ACTIONED, UNACTIONED and NOACTION. These Statuses are unable to be deleted (by pressing F11). In addition, Statuses which are attached to Requests linked to References are unable to be deleted.




*Status Maintenance Form*

### Status Code / Description

These fields allow a Status Code and Description to be entered. This status is used to describe the status of the Request e.g. Actioned, Unactioned, No Action Required etc. The system defined Statuses of ACTIONED, UNACTIONED and NOACTION cannot be deleted, along with the Statuses which are linked to References.

### Default

One Status may be selected as the default Status, and will default into the Request Status field of the Request Entry form. One Request Status must be flagged as the default (i.e. this is mandatory). The default Status cannot be deleted.

### Completion Status

Two options are available for selection in this field – 'Yes', 'No' or 'Hold'. If 'Yes' is selected, the Request Status indicates completion of the Request. If 'No' is selected, the Status indicates that the Request is not yet complete. If 'Hold' is selected, the Status indicates that the Request is not yet complete and is on hold. *

The on hold enhancement was requested via VIC and TAS SIG to allow Requests to be placed in an On Hold state (available from Release 3.07 with the appropriate authorised function). *

* You can only set Request Statuses to a Completion Status of 'Hold' if you are licensed for the new authorised function, 'On Hold Status Codes'.

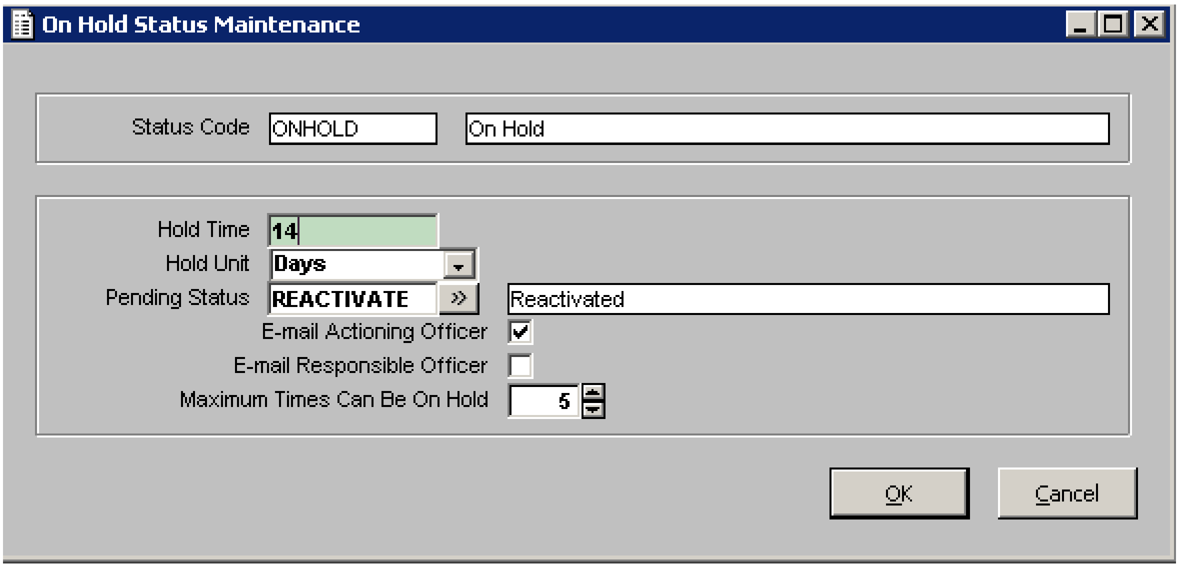
### Active

Check this flag on if the Request Status is to be active.

### On Hold Status Maintenance

* You can only set Request Statuses to a Completion Status of ‘Hold’ if you are licensed for the new authorised function, ‘On Hold Status Codes’.

When a Status is set up with a Completion Status = ‘Hold’, a new button will appear next to it to access the On Hold Status Maintenance form and set up the On Hold parameters.




The On Hold Status Maintenance form shown above allows the following fields to be defined:

| FIELD NAME(S) | DESCRIPTION |
|---|---|
| Hold Time / Hold Unit | The Hold Time and Hold Unit fields combine to define the actual duration for which a Request will be placed On Hold.<br>Eg. Number of Days, Weeks, Months, etc |
| Pending Status | The Pending Status is the Status code that the Request will be stamped with upon completion of the On Hold duration. This allows entry of Status codes with a Completion Status of “No” only. |
| E-Mail Actioning Officer | If checked, then the Actioning Officer on the Request will be sent an E-Mail message when the Request completes its On Hold processing. |
| E-Mail Responsible Officer | If checked, then the Responsible Officer on the Request will be sent an E-Mail message when the Request completes its On Hold processing. |
| Maximum Times Can Be On Hold | Specifies the maximum times a Request can be set On Hold before not being allowed to use this status. If set to zero, then there is no restriction.<br>Eg. If set to 3 and a Request has been previous placed On Hold 3 or more times with this or any other On Hold status, then the system will not allow the user to set the Request to this Status again. |

# Request Type Maintenance

This parameter allows Request Types to be set up.

Request Types may be established in a hierarchical fashion. An unlimited number of levels may be used. Specific requirements of the customer will determine the hierarchical structure. Shown below is an example of how the request types may be established.

**Example**

- Engineering
  - Roads
    - Pot Holes
    - Re-surface
  - Footpaths
    - Tree Roots
    - Pedestrian Hazard

- Environmental Health
  - Dogs
    - Barking Dogs
    - Dog Attack
    - Dog Wandering
  - Garbage
    - New Bin Request
    - Garbage not picked up

It is recommended that significant thought is given to the structure of the Request Types as this will affect reporting out of the system. For instance if you wish to report by Cost Centres then the structure you set up may well be different than if you wish to report by Department.

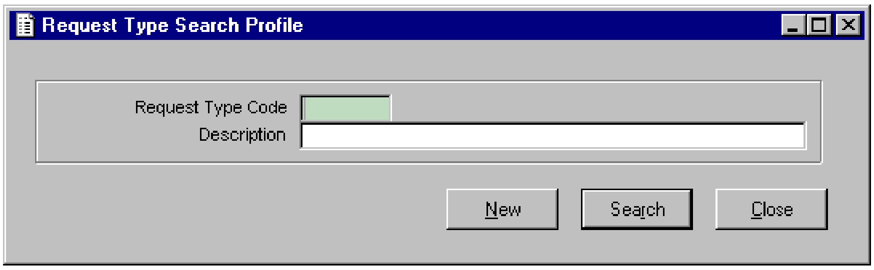
Thought should also be given to the coding for the Request Type Codes. Although they are not relied upon for data entry making them logical and consistent will assist operators.

## Request Type Search Profile Form

The Request Type Search Profile allows the user to search for specific Request Types. The user may specify particular codes to look for, or if no criteria is entered press the search button to find all Request Types that have been created.

Standard wild card searching is available on this form.

Pressing the New Button will create a new Request Type.




*Request Type Search Profile Form*

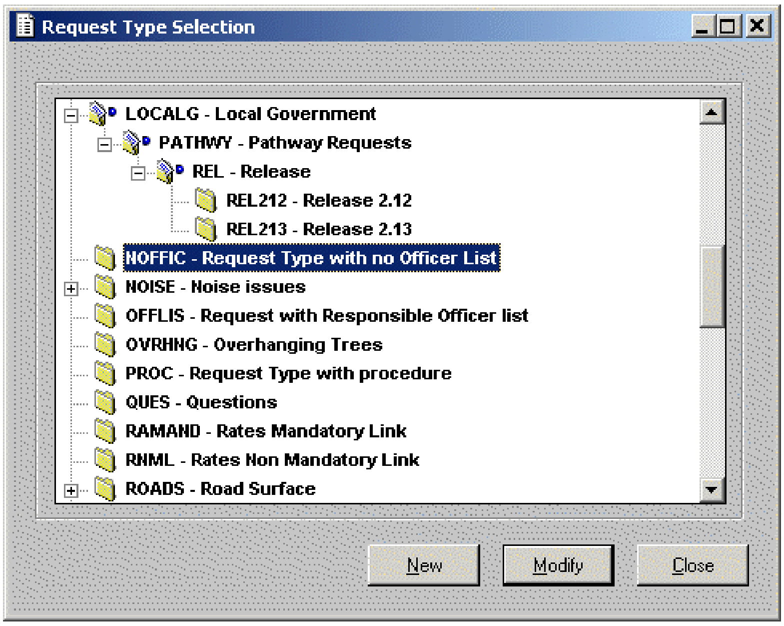
### Request Code

If the Request Type Code is known it may be entered into this field.

**Description**
If the search is to be performed via the description of the Request Type then enter the description (or part thereof using wild cards) and press the Search Button.

## Request Type Selection Form

The Request Type Selection Form displays all the Request Types that match the search criteria entered on the Request Type Search Profile. This form allows the User to select a Request Type to modify or create a New Request Type.



*Request Type Selection Form*

**Request/Description**
This field displays the Request Types created in the system in a 'Tree' style structure. The Scroll bar may be used to search up and down the selection form for the Required Request Type. The displayed hierarchy of Request Types can be navigated by expanding and collapsing the displayed branches of the 'Tree' to display/hide the child Request Types.

This form allows the use of a 'Double Click' action on the Request Type Tree in order to select a lowest level item.

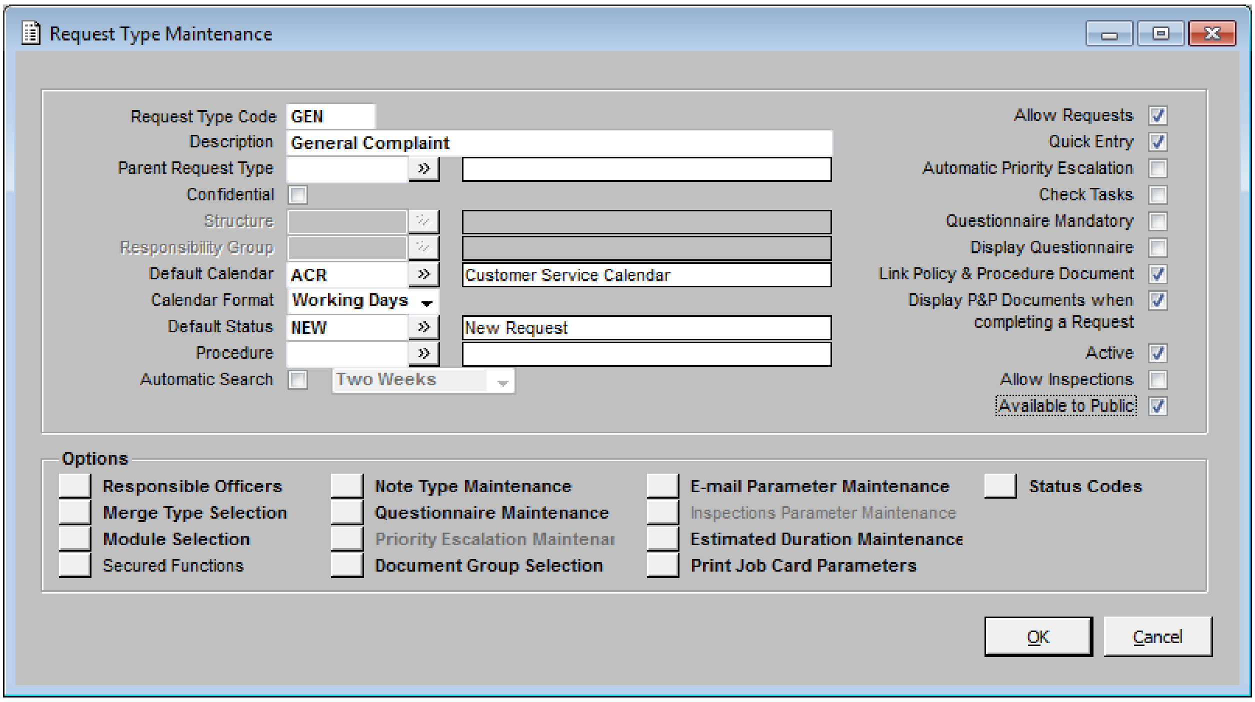
Those entries that include a [+] or [-] Node indicator will respond to the Double Click action with the normal expand or collapse behaviour, but those entries that cannot be expanded may be selected using the Double Click action (or F2).

To select a Node item it will still be necessary to use the F2 user key, or the 'Select' or 'Modify' buttons as appropriate.

Request Types which are information-only Request Types are displayed with a blue icon. These Request Types do not allow Requests to be created against them (i.e. they have the ‘Allow Requests’ flag checked off in Request Type Maintenance.)

## Request Type Maintenance Form

This form allows the creation, maintenance or deletion of Request Types.




*Request Type Maintenance Form*

**Request Type Code**

This field allows the user to enter a specific code that may be used for future Request Entries. The field may be alpha or numeric. Up to 6 characters may be used.

This field is mandatory and may not be bypassed.

**Description**

This field allows the user to enter a detailed description for the Request Type. Up to 50 characters may be entered.

This field is mandatory and may not be bypassed.

**Parent Request Type**

This field allows the user to select a Parent Request Type to associate this Request Type to. The user may key the Parent Request Type if known, or use the Pop Up Button to display a list of all Request Types created in the system.

This feature allows you to order the Request types into a logical format. There is no limit to the number of levels in the hierarchy. In the example below the Parent Request Type of Pot Holes would be Roads. The Parent Request Type of Roads would be Engineering.

**Example**

Engineering
- Roads
  - Pot Holes
  - Re-surface
- Footpaths
  - Tree Roots
  - Pedestrian Hazard

Environmental Health
- Dogs
  - Barking Dogs

Dog Attack
Dog Wandering

**Responsible Officer**

This field allows the user to enter a specific Officer that they wish to assign this Request Type to. The Officer is then usually responsible for the completion of the Request. The user may key the Responsible Officers Code if known, or use the Pop Up Button to display the list of Users which can be assigned as Responsible Officers.

A Responsible Officer is not mandatory on this form, however a Responsible Officer is mandatory for a request.

A number of Responsible Officers can be assigned to a Request Type. The Responsible Officers Option button on this form can be selected to define more than one Officer, including a default Responsible Officer.

If a Responsible Officer has been set up as the default Responsible Officer on a Request Type, it will default into this field. However, the user may change it by either entering one directly into the field or by making a selection from the Pop Up. If the selected Request Type has a group of Responsible Officers defined, the Request Type Responsible Officer Pop Up will display, listing the available Officers. Otherwise the normal User Pop Up, with all users listed, will display.

**Confidential**

This field, if checked on, allows the Request Type to be classed as Confidential.

Details on the request will be kept confidential and details should not be generally discussed. Only an officer contained within the Responsibility Structure and Group will be able to view, maintain or print the request irrespective of the officer nominated in the Responsible Officer field. It therefore follows that the Responsible Officer for this Request Type should be appropriate.

**Structure**

This field is only available if the Confidential flag is turned on. You must select a Responsibility Structure Code against the Request Type. The user may key the Structure Code if known, or use the Pop Up Button to display the list of Structures created in the system.

**Responsibility Group**

This field is only available if the Confidential flag is turned on. You must select a Group Code for the Request type. The Group Codes available are for the structure nominated in the previous field.

By selecting a Responsibility Group, only users nominated within that Group (within the Structure) are able to view, maintain or print the request.

**Default Calendar**

These fields allow the selection of a Calendar to be used when any Date and Duration calculations are made for Customer Service Requests based upon a Request Type. The selection of a Calendar against a Request Type is optional. If a Calendar is selected against the Request Type then this Calendar will be used in the calculation of the ‘Respond by Date’ against a Customer Service Request. If a Calendar is not selected then the ‘default’ calendar will be used in determining the ‘Respond by Date’.

The popup button displays the standard Calendar popup from which the user may select an alternative calendar to be used for the Request Type. If no selection is made, then the System Default Calendar, as defined for the Customer Service Application, will be used. The default calendar is sourced from the module System Parameters for Customer Service.

The selected calendar will be used whenever Date and Duration calculations are required on a Customer Service Request. This includes, for example, changing the Status of a Request to a Completed Status, either via Request Maintenance or via a Workflow Task that updates the Status, the Overdue Warning Report, Automatic Priority Escalation and Multiple Request Completion etc.

**Calendar Format**

This field determines whether all days are to be used when determining the Date to Respond By on the request or only those days nominated as Working Days.

This field is used in conjunction with the Estimated Time field.

This field is mandatory.

**Default Status**

This field allows the user to enter a Default initial Status to be assigned to this Request Type. The Pop Up may be used to make the selection.

Note: If the authorised function 'Status Codes at Request Type Level' is active then the Default Status selected here must be one of the Assigned Status Codes for the Request Type. The Pop Up will only display those Status Codes which have been assigned to the Request Type (via the Status Codes option button).

**Procedure**

If the Work Flow module is being used in conjunction with Customer Service then you may select a Procedure (a group of Tasks) to be automatically loaded when a request is entered.

Enter a valid procedure code (if known) or alternatively press the pop up button associated with the field to select from the Procedure Pop Up List.

If a Request has not been saved before, the procedure attached to the selected Request Type will not be inserted when the Cancel button is selected.

**Automatic Search**

If the check box is turned on then when a new request is entered the system will automatically search across the database for any other requests that are for the same request type and have been entered within the nominated time frame.

If requests are found they will be displayed to the user who may then choose the correct course of action.

**Allow Requests**

If this flag is checked on, then Requests are able to be created against this Request Type. If the flag is checked off, then the Request Type is used for information purposes only and cannot have Requests created against it. This function allows better categorising of Requests under hierarchical headings. The default value for this flag is 'ON'.

**Quick Entry**

Some councils may wish to provide users with a quick way to log a request to capture any queries they have dealt with. This process would be simple and requiring few keystrokes.

To facilitate this, a new Boolean flag 'Quick Entry' has been introduced in the Thick Client Request Type Maintenance form which is currently shared by both Thick Client and Smart Client for Pathway Release 3.04. The new attribute is actually used for the Smart Client Pathway only and is designed to identity Request Types which are used to generate ad hoc Requests which a council may use for statistical purposes. (Some councils may wish to provide users with a quick way to log a request to capture any queries they have dealt with. This process needs to be simple and requiring few keystrokes)

Note: The associated Smart Client forms have not yet been developed (as of Release 3.04). Once the Smart Client Request Type Maintenance becomes available, the flag will be removed from the Thick Client form.

**Automatic Priority Escalation**

This flag determines whether Requests of this Request Type will be escalated. If the flag is 'on' then Requests based on this Request Type can be manually escalated based on the Request Type parameters.

As of Release 2.15, Automatic Priority Escalation against a Request Type will occur if this flag is checked ON and pre-defined checkpoints have been set up under Priority Escalation Maintenance. New background escalation jobs will be submitted to the batch queue when a Request Type's Priority Escalation Parameters are modified by a user, either by changing the fields of Priority, Escalation Time and Escalation Unit, adding a new checkpoint or deleting a checkpoint.

Note: Since the "Automatic Priority Escalation" and "Background Request Escalation" functions could be running on different job queues, a side effect is that potential conflict may exist when running these two functions at same time, as they might try to update a Request's Priority concurrently. The Automatic Priority Escalation Control will check the system parameter for "Use Background Escalation". If it is checked off, the "Automatic Priority Escalation" function will run normally as in Release.2.14. If it is checked on, a message is displayed to indicate that potential conflict exists and asks the user whether he/she wants to continue the process or not. The process exits if the user chooses "No". If "Yes" has been selected the process will be continued and the new escalation jobs will be submitted for all updated Requests.

**Check Tasks**

This field is used to determine whether a check needs to occur to ensure that there are no incomplete Tasks associated with the Request, before allowing/disallowing the Request to be completed.

To enable the check for incomplete Tasks, the Check Tasks checkbox must be turned on for each Request Type that requires this check to occur.

If this flag is checked on the user may only set the Request Status to a Completed Status when all tasks loaded against the Request are complete, i.e. the Actual Completion Date exists on all Tasks. If the user attempts to set the Request Status to "Actioned" or "No Action Required" and there are outstanding Tasks, then the following message will be displayed: "This Request has outstanding Tasks". The Request Status will still read "Unactioned".

If this flag is checked off then the Request may be marked as complete even though there may be outstanding work flow tasks.

**Questionnaire Mandatory**

The user may check this flag ON to indicate that a response to a Questionnaire is mandatory on acceptance of a Request. If 'Questionnaire Mandatory' is flagged ON then the 'Display Questionnaire ' option is set ON and cannot be maintained.

Note: In Request Entry, if there is a Default Questionnaire set up for the Request Type (and the Questionnaire Mandatory flag is ON), then the first question from that Questionnaire will be presented to the user when the Request is saved. If no default Questionnaire is defined and there is more than one Questionnaire defined for that Request Type, then the Questionnaire Selection form will display to allow the user to select a Questionnaire.

The default value for this flag is set to OFF.

**Display Questionnaire**

This flag is used to determine whether the default Questionnaire will be displayed when the Request is accepted or cancelled. If the Questionnaire is flagged as mandatory then the 'Display Questionnaire ' option is set ON and cannot be maintained. If 'Display Questionnaire' is set ON then the Questionnaire Maintenance screen will display. In addition, the first question will automatically display.

If 'Display Questionnaire' is set OFF then the Questionnaire Maintenance screen will not display at all. This flag does not, however, control whether a Questionnaire will display when invoked via a Workflow Task (e.g. a Task using the QUESTION User Action).

Note: If there is at least one question answered then the automatic display of the Questionnaire will not occur when accepting or cancelling a Request.

This option will be set OFF by default.

**Link Policy & Procedure Document**
If this parameter is set on it will automatically link the Policy and Procedure document selected on Policy and Procedure Document Enquiry to the Request that is raised. This functionality only occurs when creating a Request via the 'Policy and Procedure documents – Request Entry' menu option. If this parameter is set off then it will not automatically link any Policy and Procedure documents to the Request.

**Display P&P Documents When Completing a Request**
This flag informs Request Maintenance that when completing a Request the user is to be given the option to link Policy & Procedure Documents to the Request. This flag will only display when the Authority code for Policy & Procedure Documents is in effect.

**Active**
If this field is checked on, then the Request Type is active and may be used when creating a Customer Request.

If this field is checked off, then this request type will not be available when creating a Customer Request.

**Allow Inspections**
If this field is checked on, then the Inspections Parameter Maintenance option button becomes available to set up Inspection parameters. Once parameters have been set up for Inspections the 'Allow Inspections' checkbox option will be dimmed. (You cannot uncheck the 'Allow Inspections' option whilst there are parameters in place.)

**Available to Public**
This flag indicates whether a Request Type is available to the public, for example, via the Pathway Smart Mobile City Watch application. Please note that this parameter will ONLY be available if the Parent (or Grandparent) request type is also available to the public.

Furthermore, this field is only available to sites which are authorised to the Pathway Smart Mobile CityWatch and/or Pathway Customer Service External Web Services. In the event that Councils wish to develop their own public facing customer service application by utilising Pathway Customer Service External Web Services, this flag may be used to limit Request Types available to public users.

**Options**
The Options detailed against the Request Type allow the user to select the specific options that may then be assigned against the particular Request Type.

The Responsible Officers option allows one or more Responsible Officers to be set up for a Request. Click this option to display the Request Type Officer Maintenance form.

The Merge Type Selection option button allows selection of available Merge Types to be assigned to Request Types. Click this option button to display the Merge Type Selection form.

The Module Selection option button allows module links to be established for the Request Type. Click this option button to display the Module Selection form.

The Secured Functions option button displays the secured functions available in Customer Service and the users who can perform that function. If the Request Type is a child Request Type, the 'Secured Function' option button will be dimmed. It will use its parent secured function settings.

The Note Type Maintenance option button allows Note Types to be defined for a Request Type. This option button is only available for Parent Request Types, and is dimmed (unavailable) on Child Request Types.

The Questionnaire Maintenance option button allows a Questionnaires to be set up to be available when maintaining a Customer Request. The requirement to complete the Questionnaire when entering a Request can be flagged as mandatory. Click this option to display the Questionnaire Maintenance form.

The Priority Escalation Maintenance option button allows escalation times and actions to be set up for the different priority levels. Click this option to display the Priority Escalation Maintenance form.

The Document Group Selection option button allows selection of Document Groups that are defaults for the Request Type. Click this option button to maintain the list of Document Groups currently linked to the Request Type.

The Email Parameter Maintenance option button allows email parameters to be set up. Click this option button to display the E-mail Parameter Maintenance form.

The Inspections Parameter Maintenance option button allows Inspections parameters to be set up. Click this option button to display the Request Type Inspection Parameter Maintenance form.

The Estimated Duration Maintenance option button allows the user to define the estimated duration for each Priority level (Note: This replaces the 2 fields, Estimated Time and Default Priority, which have now been removed). It allows the Priorities 1, 2, 3, 4 and 5 to be set up with the following Unit Types – Minutes, Hours, Days, Weeks and Years. One Priority is able to be set as the default and will be used as the Priority when new Requests are entered. It is mandatory to enter values for all Priority levels. The ability is also provided to apply the settings to all or some of the children of the Request Type (in a similar fashion to that available in Priority Escalation Maintenance).

The Print Job Card Parameters option button will only be available if the user is authorised to the Print Job Card function and Job Card parameters have also been set up in Customer Service System Parameters. If System Parameter Job Card Parameters have not been defined, then the Print Job Card Parameters button will not be available on the Request Type Maintenance form. In addition, the Job Card button will not be available on the Request Selection form. If Job Card parameters have been set up at the Request Type level, these will override any set up at the System Parameter level. If Job Card parameters are not defined at the Request Type level, then the System Parameters Job Card parameters will be used.

Selection of this button will display the Job Card Parameter Maintenance form. See further details under Job Card Button in Request Selection.

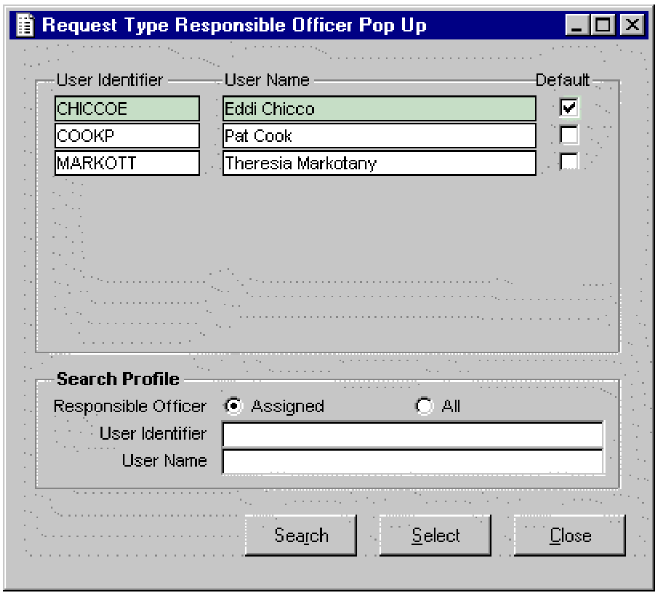
The Status Codes Option button will only be visible on this form if the authorised function ‘Status Codes at Request type Level’ is authorised. [For those sites not authorised, the existing Status Code functionality remains unchanged.] If one or more Status Codes have already been assigned to the selected Request type, then the text on this button will be bolded.

When the Status Codes button is selected it will display the Request Type Status Code Maintenance form.

If one or more Status Codes have been assigned to the selected Request Type, then the Status codes that are valid and are available in the Pop Up for the ‘Default Status’ field will be restricted to those assigned to the selected Request Type.

## Request Type Responsible Officer Pop Up Form

This form enables the selection of a User to allocate as a Responsible Officer. A selection may be made from the Assigned list or from all the available Users.



*Request Type Responsible Officer Pop Up Form*

**User Identifier /User Name**

These fields display a list of Users which have been defined as Responsible Officers at the Request Type level. To select a different User, select the “All” radio button in the Search Profile and click the Search button.

**Default**

This flag will be checked on if the User has been defined as the default Responsible Officer at the Request Type level (in Parameters). This field cannot be modified on this form.

**Search Profile – Responsible Officer**

The following radio buttons allow a search to be done over either the Assigned Officers or over All the available Users:

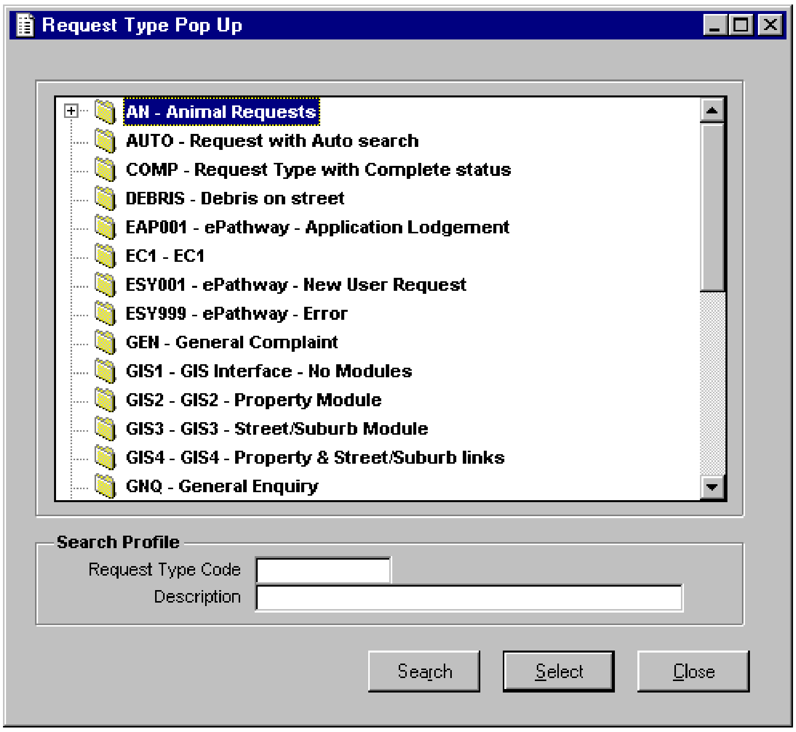
- Assigned
- All

**Search Profile - User Identifier / User Name**

A User Identifier and/or Name may be entered in these fields as a search profile to retrieve specific Responsible Officers.

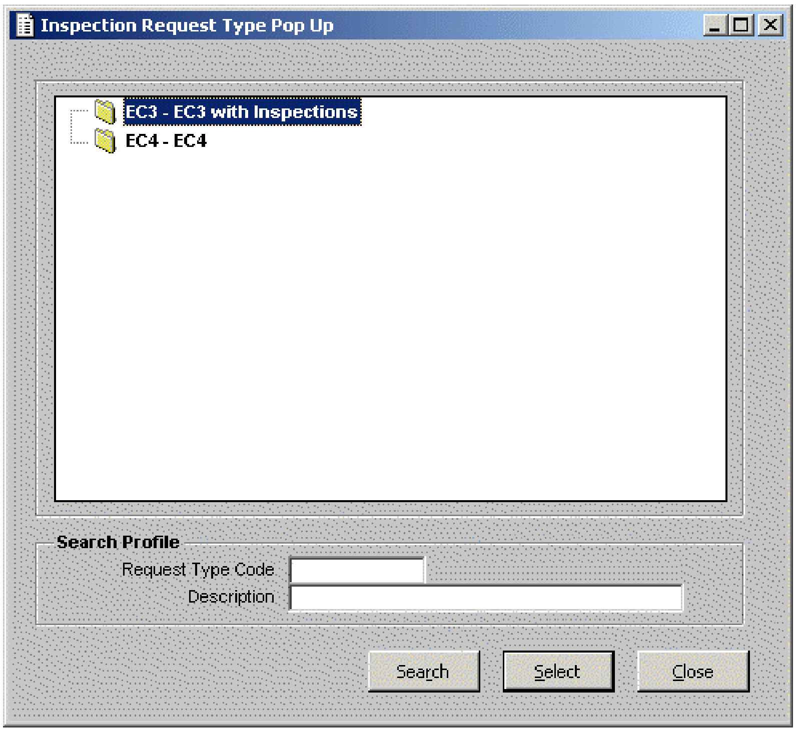
## Request Type Pop Up Form

The Pop Up Form displays the available Request Types in a hierarchical list. Full wild card searching is available on this form via the Search Profile at the bottom. If a Search Profile is used, the retrieved list will display the Request Types at one level rather than in a hierarchical fashion.




*Request Type Pop Up Form*

This form is also used as the Inspection Request Type Pop Up form which will display when the Inspections button is selected on the Request Search Profile form if more than one Request Type has Inspection Parameters set up. It allows filtering on Request Type to occur. This form will display to allow selection of a Request Type that is to be used in filtering the Inspections. Note that the Request Types listed for selection will only be those that have Inspection Parameters defined.




*Inspection Request Type Pop Up form*

**Request Type Tree**

This field displays all the Request Types in a hierarchical 'Tree' style. If a Search Profile is used to filter the display, then the retrieved list will display at one level. This field is display only and may not be modified.

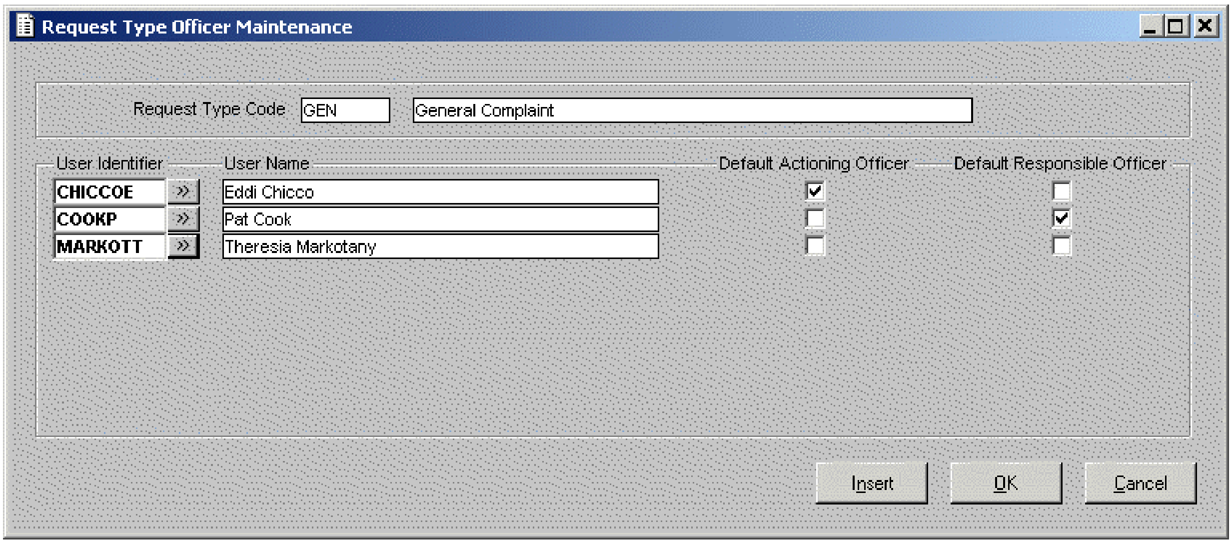
The branches of the tree may be expanded and collapsed using the mouse or keyboard arrow buttons. Items can be selected by focusing on the required group and using the 'Modify' button or F2.

**Search Profile - Request Type Code/Description**

If you wish to search for a specific Request Type then enter the Request Type Code and/or Description into these fields and press the Search Button. Advanced profile techniques are available for this field.

## Request Type Officer Maintenance Form

It is possible to link multiple Actioning and Responsible Officers to a Request Type. This form is used to define one or more Users as Actioning Officers and/or Responsible Officers. Only one Actioning Officer and one Responsible Officer can be set as the defaults. The same user can be set as the default Actioning and the default Responsible Officer.




*Request Type Officer Maintenance Form*

**Request Type Code**

These fields display the Request Type Code and Description. These fields are display only and cannot be modified.

**User / User Name**

These fields allow entry of a Username to allocate as a Responsible Officer, or, alternatively, a user may be selected from the Pop Up. Multiple entries are allowed, however, only one is allowed to be set as the default.

**Default Actioning Officer**

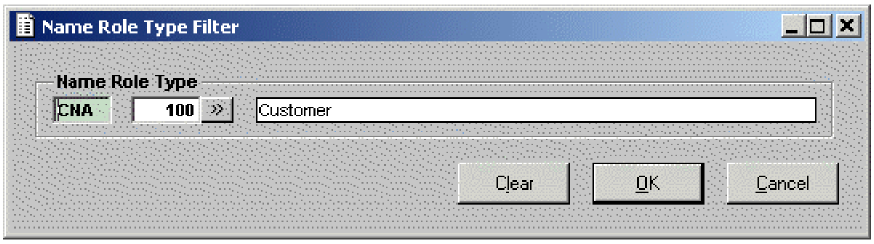
Check this flag on to set a default Actioning Officer. Only one User is able to be set as the default. The Actioning Officer represents the officer that carries out the work related to the request.

**Default Responsible Officer**

Check this flag on to set a default Responsible Officer. Only one User is able to be set as the default. The Responsible Officer represents the officer responsible for ensuring that the request is completed.

## Role Type Filter Form

The application name for this form will depend on the Extract List Type being processed.
This form allows the selection of a single Role Type for which to extract the application's details. No selection means that all Role Links will be processed. The Pop Up form will only show the Role Types that are valid for the Application associated with the Extract List.




*Role Type Filter Form*

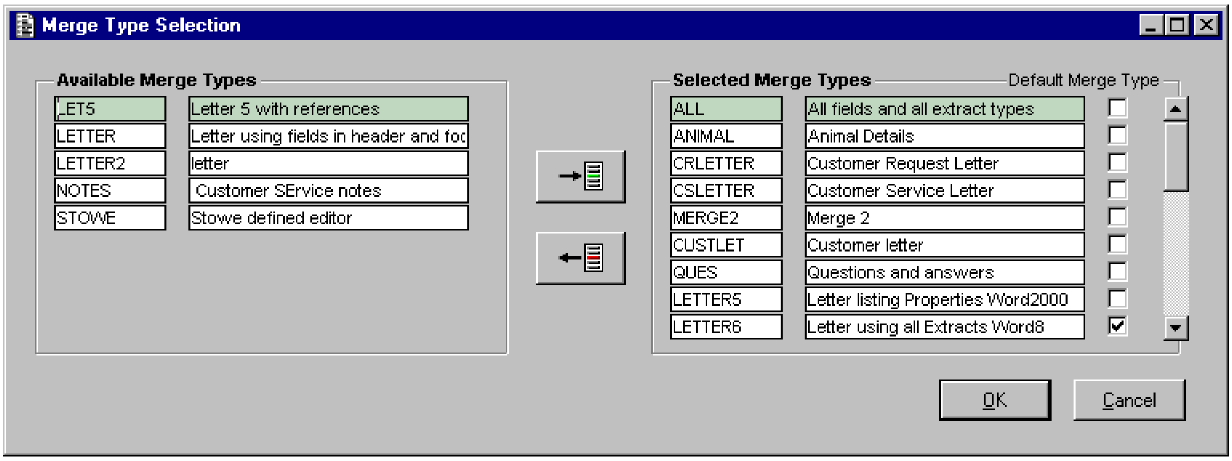
**Name Role Type**

These fields display the selected Role Type. The Pop Up may be accessed to select an available Role Type. Once a Role Type has been selected, it will be defaulted into these fields. To clear the selection simple click the 'Clear' button.

## Merge Type Selection Form

The Merge Type Selection Form displays all Merge Types that have been created for Customer Requests. The Merge Types are listed as available, and may be assigned, by highlighting the required Merge Type and pressing the Select Button located in the middle of the form. The user may continue to highlight and click the required Merge Types to Associate with the Request Type.

To de-assign the Merge Types, the user should highlight the Merge Type and press the Remove Button located in the middle of the form.




*Merge Type Selection Form*

**Available Merge Types**

This list displays all Merge Types (letter templates) that have been established for the Customer Service System.

**Select/Remove Buttons**

The Select/Remove buttons may be used to move Merge Types from the 'Available' side to the 'Assigned' side and vice versa.

**Selected Merge Types**

This list displays all Merge Types (letter templates) that have been assigned to the current request type. If a merge type is not assigned to the Request Type it will not be available for use on a customer request record.

**Default Merge Type**
A Default Merge Type can be specified to be used when 'Print Maintenance' is accessed from the Customer Request Entry/Maintenance form. Only one Merge Type can be selected as the default. This default will only default into 'Print Maintenance'. It will not default into 'Letter Maintenance' accessed from the 'Create Letter' Option. If no default is specified here, then the default Merge Type set up within System Parameter Maintenance will be used.

## Secured Functions Maintenance Form

This form displays when the 'Secured Functions' option button is selected on the Request Type Maintenance form. The Secured Functions button will be unbolded if there are no secured functions set up. Secured Functions are able to be assigned individually for each Request Type, or in bulk via the Secured Functions Menu option.

Note: Secured Functions are only able to be set up at the Parent Request Type level.

Note: When a Secured Function is on the Available side it is available to all users. If it is moved to the Assigned side, it becomes secured and available to no-one unless a user is assigned by giving them authority via Authorised User Maintenance (accessed via the detail button next to the Secured Function on the Assigned side).

### Request Summary - Secured Function Codes

**Note**: This function is controlled by the 'Customer Service History Logging' Authorised Function. This means that it will only function if you are authorised to use it. If customers do not have this option and require the ability to use it then it is advisable that they contact their account manager to organise the purchase of this function.

**Authorised Function details**

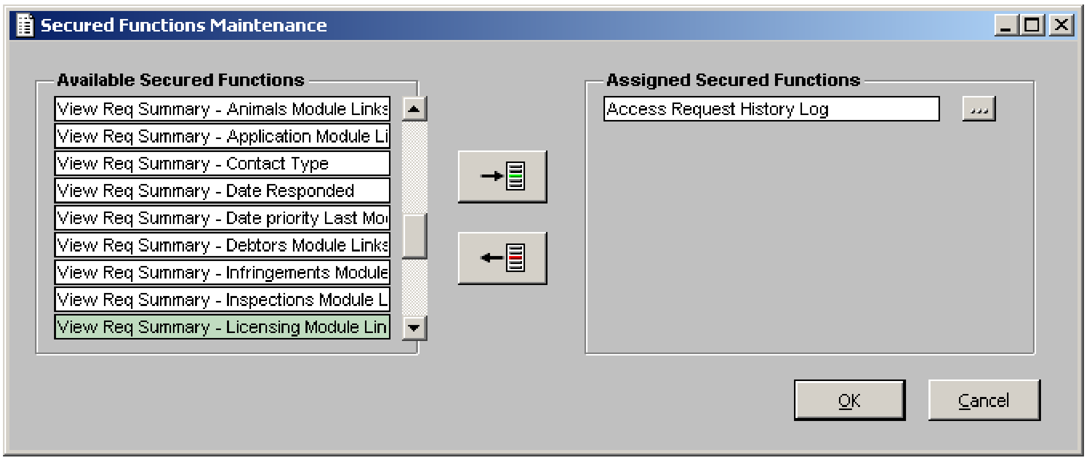
If the Authorised Function, 'Customer Service History Logging" is checked OFF (i.e. inactive) then the user will not have access to the Request Summary – Secured Function Codes. The 'View Req Summary' secured functions will not be among the Available Secured Functions on the Secured Functions Maintenance Form for a Request Type.

There are 20 new Secured Function Codes defined for Customer Service related to viewing Request Summary details. These Function Codes define whether or not a user is to be allowed to view certain Request details in the various Summary Details forms. When these Function Codes are unassigned, then the default action is to 'Allow' the users to see the associated Request details. If the Function Code is assigned, then the associated Request Summary details will be blocked from view. In order to make these details viewable to a user, then the user's userid must be assigned to that particular secured function (in Parameters>>Request Type Maintenance>>Secured Functions>>Authorised User Maintenance).

- View Req Summary - Animals Module Links
- View Req Summary - Application Module Links
- View Req Summary - Contact Type
- View Req Summary - Date Responded
- View Req Summary - Date priority Last Modified
- View Req Summary - Debtors Module Links
- View Req Summary - Infringements Module Links

- View Req Summary - Inspections Module Links
- View Req Summary - Licensing Module Links
- View Req Summary - Names Module Links
- View Req Summary - Property Module Links
- View Req Summary - Rates Module Links
- View Req Summary - References
- View Req Summary - Registers Module Links
- View Req Summary - Request Notes
- View Req Summary - Request Priority
- View Req Summary - Request Receiving Officer
- View Req Summary - Requestor Type
- View Req Summary - Respond by Date
- View Req Summary - Time Taken

Note: If you do nothing with these new parameters and Secured Functions, the system should operate as normal.




**Note:** When assigned and a User is not named, the 'View Req Summary' function codes will ***DISALLOW*** users to view the various Request Summary details, so it is necessary to explicitly grant user authority to this function.

**Note:** When unassigned, these function codes will *ALLOW* users to view the associated information. Once assigned, however, a User must be named on a Function Code in order to see the associated information in any Request Summary fields. Otherwise, the message '*** Details Blocked ***' will be shown instead. **Please note that, as a result of enhancements to improve performance, it may now be necessary to restart Pathway sessions in order for changes to Secured Function authorities to take effect.**

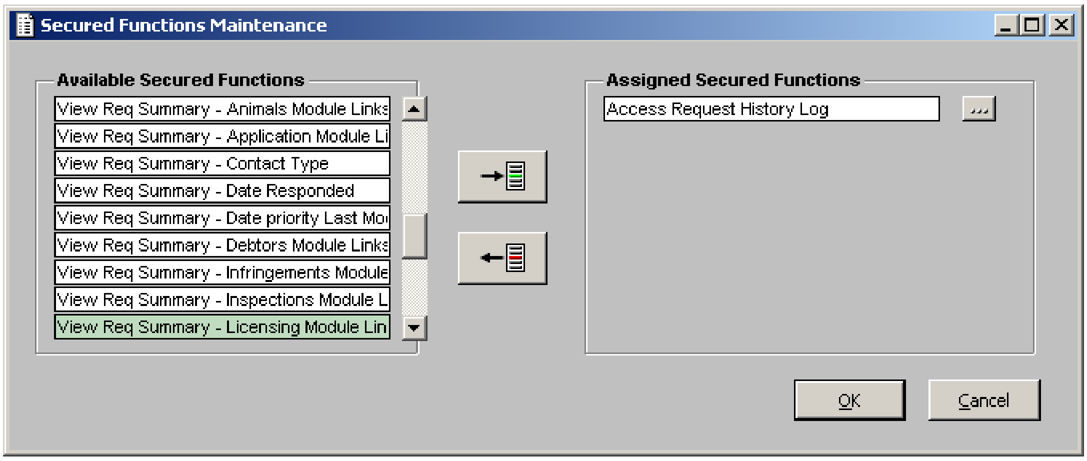
Additionally, there are 21 new Secured Function Codes defined for Customer Service. The first of these (Access Request History Log) grants access to the 'History Log' option in Request Maintenance. If this Function Code is unassigned, then the default action is to 'Disallow' the user from using the History Log option. The remaining 20 Function Codes define whether or not a user is to be allowed to view certain Request details in the various Summary Details forms. When these Function Codes are unassigned, then the default action is to 'Allow' the users to see the associated Request details.

Note: If you do nothing with these new parameters and Secured Functions, the system should operate as normal.

The following Secured Function Code provides for the control of access to the History Log and of the viewing of Request information on the various selection forms etc that include Request Summary information.

As with other Secured Function Codes these are assigned by Request Type.

- Access Request History Log




**Note:** When unassigned, or when assigned and a User is not named, this function code will ***DISALLOW*** users access to the History Log Enquiry, so it is necessary to explicitly grant user authority to this function.

This option is set up on Parent Request Types only. The options chosen on the Parent are automatically applied to all Child Request Types. This option is greyed out on Child Request Types.

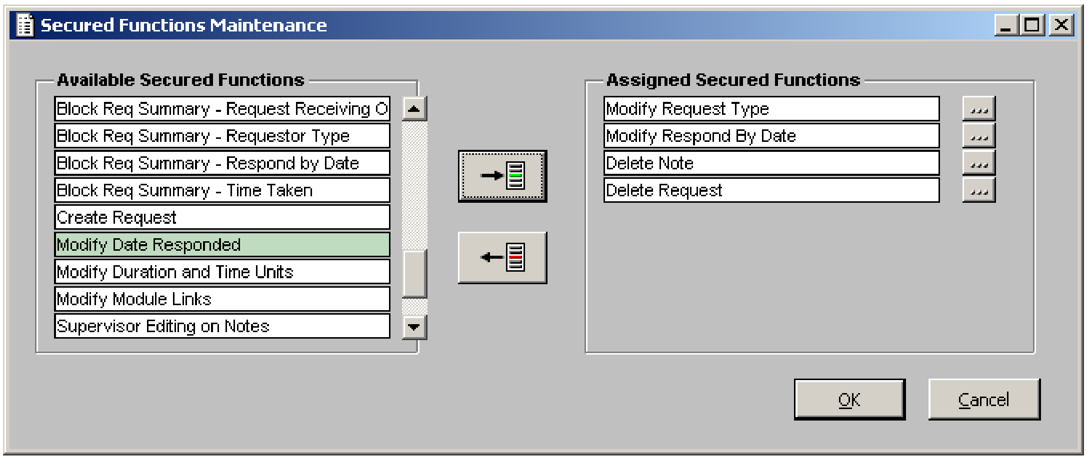
The following secured functions can be made available to specific users of Pathway for each Request Type:

- Access Request History Log ****
- Add Notes on a Request
- Create Requests
- Delete Notes on a Request
- Delete a Request
- Modify the Date Responded on a Request
- Modify the Duration and Time Units on a Request
- Modify Module links on a Request
- Modify a Request Type on a Request
- Modify the Respond By Date ****
- Supervisory editing of Notes on a Request ****

NOTE: following are some exceptions to that rule ( ****** )

- History Logging IS NOT available to Users unless the option is assigned and Users specified.
- Supervisor editing on Notes would allow any Users specified to edit another Users Notes ONLY if the “Allow Note to be Edited” is set on each of the Note Types available for the Parent Request Type.
- The Modify Respond By Date (Due Date) IS NOT available to Users unless the option is assigned and Users specified.

Refer to History Logging Action Parameters



*Secured Functions Maintenance Form*

**Available Secured Functions**

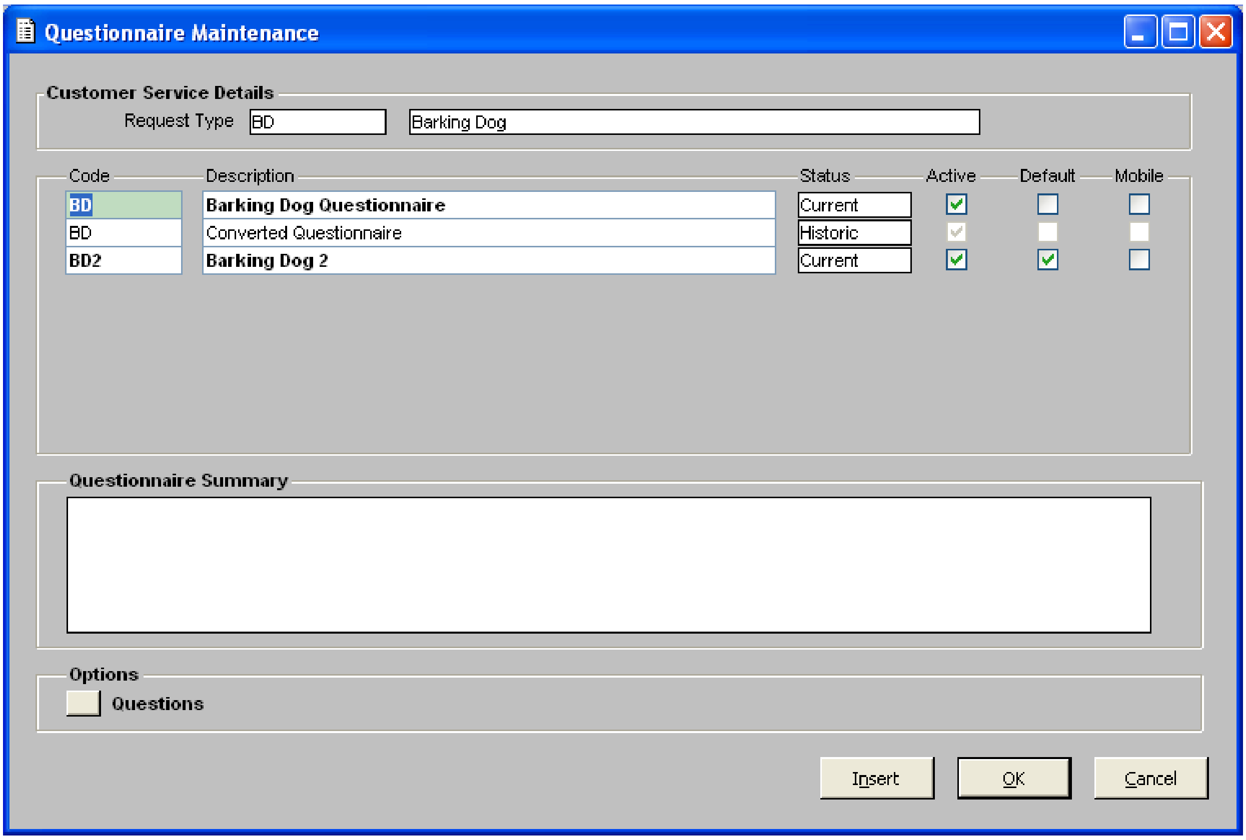
These fields list the Secured Functions which are available. The Select/Remove buttons may be used to assign and de-assign Secured Functions. The functions available are as follows:

**Assigned Secured Functions**

These fields list the Secured Functions which have been assigned for the Request Type. Selection of the Detail button displays the Authorised User Maintenance form where Users may be set up to have authority.

## Questionnaire Maintenance Form

The Questionnaire Maintenance form allows maintenance of multiple Questionnaires for the Request Type.
Only one Questionnaire is able to be flagged as the Default Questionnaire. An inactive Questionnaire cannot be selected as the default. If the Default flag for a Questionnaire is set ON, and another Questionnaire is already defined as the default, then the Default flag for that Questionnaire will be set OFF to ensure that there is only ever one default.




*Questionnaire Maintenance form*

***Deleting a Questionnaire***

A Questionnaire can only be deleted if it has either never been used in the creation of a Request (i.e. it has only just been created), or it has been used in the creation of a Request – but none of the Questions has ever been answered.

NOTE: If there is an earlier 'Historic' version of the Questionnaire, it will be reinstated as the 'Current' version.

*ePathway Considerations*

If the Questionnaire being modified is defined as the 'Required Questionnaire' for an ePathway Customer Request Type and either of the following scenarios occurs :-

- If an answered Questionnaire is modified (i.e. it Historicises the previous version and creates a new 'Current' version)
  Or
- If a Questionnaire is deleted (and an earlier 'Historic' version is reinstated as the 'Current' version)

then the following message will be issued warning that action must be taken in ePathway.


**Request Type Details**

These fields display the selected Request Type and Description from the previous screen.

**Questionnaire Details**
This section of the form displays the Questionnaire details.

**Code**
This field allows a Code to be entered to describe a Questionnaire. There may be more than one Questionnaire with the same Code, but there will only ever be ONE Current version (i.e. with 'Status' set to 'Current').

**Description**
This field holds the Description of the Questionnaire.

**Status**
The Status field is maintained by the system. When a new Questionnaire is added, the Status is set to 'Current'. If the Questionnaire is subsequently modified (i.e. Questions are added, deleted or changed) then we keep the 'BEFORE' version of the Questionnaire by making the current version 'Historic' and creating a new 'Current' version which can then be modified.
(NOTE This is how we retain the original version of a Questionnaire that was current at the time the Questions were answered for a Request.)

**Active**
The Active flag is automatically set on when a new Questionnaire is created.
A Questionnaire may be 'retired' when it goes out of date or is no longer required – simply by setting the Active flag off.
A Questionnaire may be 'reactivated' by setting the Active flag on

**Default**
The Default flag is Optional.
Only ONE Questionnaire is able to be flagged as the Default Questionnaire. An Inactive Questionnaire cannot be selected as the Default.

NOTE: If the Default flag for a Questionnaire is set on, and another Questionnaire is already defined as the default, then the Default flag for that Questionnaire will be set off to ensure that there is only ever ONE default

**Mobile**
Only one Questionnaire is able to be flagged to display in Mobile Computing. Setting the Mobile flag ON for a Questionnaire will turn any other Questionnaire Mobile flag OFF. An Inactive Questionnaire cannot be selected.

Note: If none of the Questionnaires is selected for 'Mobile Computing', then all questions from all active Questionnaires will display when the Questionnaire functionality is invoked in Mobile Computing.

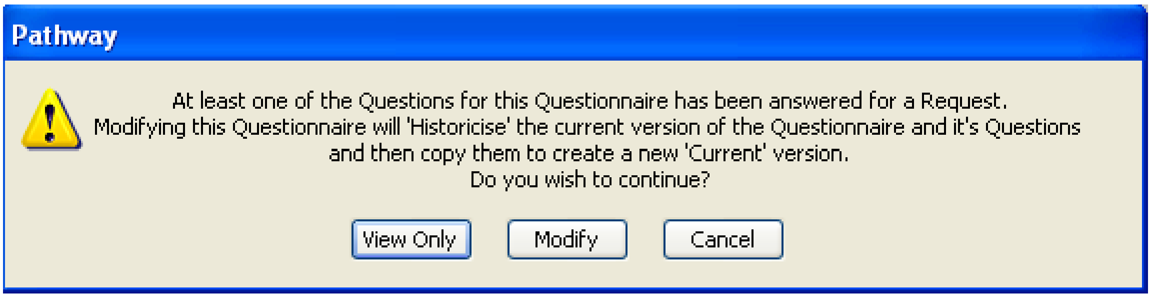
**Questionnaire Summary**
The Questionnaire Summary field is a display only field which shows the Questionnaire Summary details as entered on the Questionnaire Question Maintenance form for the Questionnaire.

**Options – Questions**
The text for this button will be bolded if any Questions exist for the Questionnaire.

When this button is pressed:

- If the Status of the selected Questionnaire is 'Historic'
  - It will display the Question Maintenance form in display mode – and no changes will be allowed
- If the Status of the selected Questionnaire is 'Current'
  - If no Questions exist yet or if they do exist, but none of the Questions for the Questionnaire has yet been answered for a Request, It will display the Question Maintenance form and allow the Questions to be maintained

- if any of the Questions for the Questionnaire has been answered for a Request it will display the following message




**View Only:** This option allows you to just look at the Questions for the selected Questionnaire without modifying them. i.e. When pressed, it will display the Questionnaire Question Enquiry form for the selected Questionnaire – but will not allow changes.

**Modify:** This option will do the following. It will keep a ‘BEFORE’ version of the Questionnaire and its Questions by making the current version ‘Historic’. It will then make a new ‘Current’ version and will display the Questionnaire Question Maintenance form to allow modification to occur.

**Cancel:** This option will simply return to the Questionnaire Maintenance form.

NOTE: A Questionnaire will only be displayed for answering in Request Maintenance if it is Active and the current system date is within the Effective From/To dates nominated (if any).

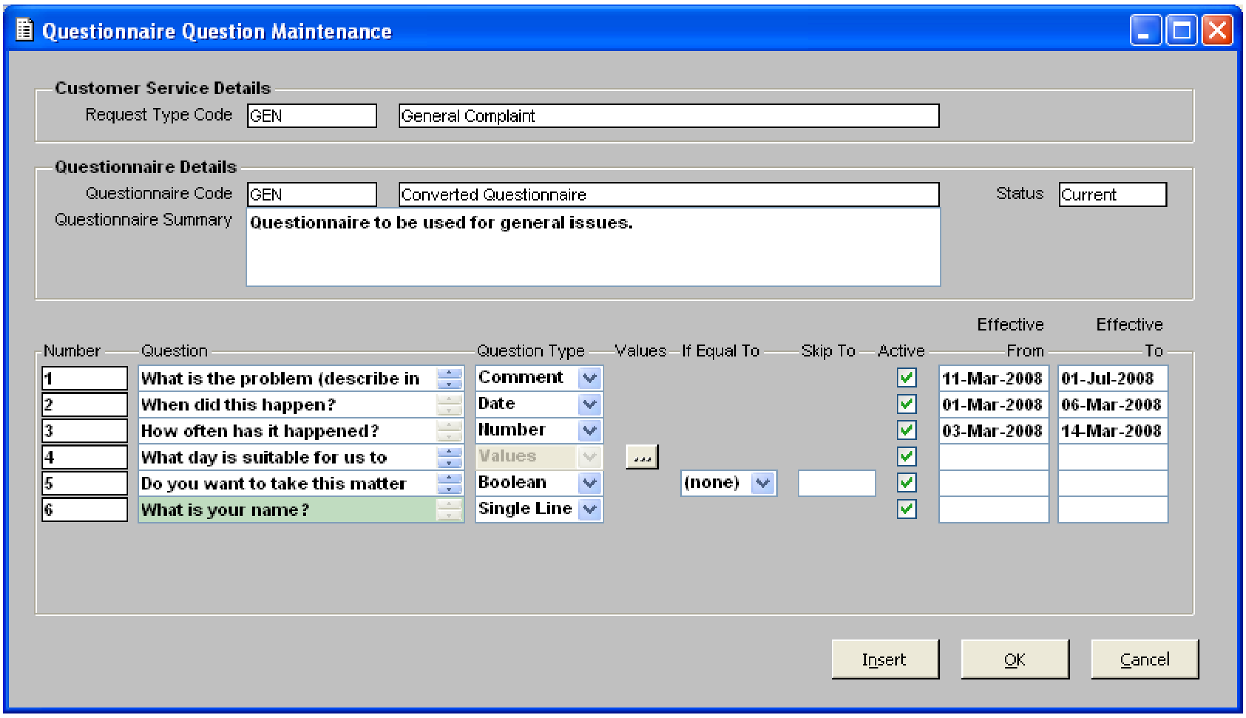
## Questionnaire Question Maintenance Form

The Questionnaire Question Maintenance form allows maintenance of questions for a selected Questionnaire.

It allows the user to enter multiple questions and allows for various answer types to be defined. The answer may be one of six formats -

- Comment - Free format textual response
- Boolean - Yes, No or blank response
- Number - Numeric value.
- Date
- Values - Multiple Choice
- Single Line

Note: Skip Processing can be applied to a Boolean Question type and is dependent on the answer given. For example if the answer to question 1 is N, then go to Question 4. Skip Processing is only available where the Question Type is Boolean. If the response to a “Boolean” type question is required to go to the end of the Questionnaire then the Skip To value should be a value greater than the last question number.



*Questionnaire Question Maintenance form*

### Request Type Code

This field contains the code and description of the Request Type to which the Questionnaire belongs.

### Questionnaire Details

These fields contain details of the Questionnaire Code and Description defaulted from the previous screen.

The Questionnaire Summary field is an optional field where a summary may be keyed in for the selected Questionnaire. Any details entered or modified here will display in the 'Questionnaire Summary' field on the Questionnaire Maintenance form when focus is placed on the selected Questionnaire.

### Question Number

This field displays the number that is assigned to each question. This number is assigned by the system and may not be modified.

### Question

This field allows the user to enter specific question text. Up to 250 characters may be entered.

### Question Type

Options to select from using the drop down button are:
<u>Boolean</u>
If Boolean is selected then the user must answer the question with a Yes or No response. (The user may also select a blank response (none).)
<u>Comment</u>
If Comment is selected then the user may enter free format text in response to the question.
<u>Date</u>
If Date is selected then the user must answer the question with a Date response.
<u>Number</u>
If Number is selected then the user must answer the question with a numeric value.
<u>Values</u>
If Values is selected then the user is able to select an answer from a pre-defined list of options.
<u>Single Line</u>
Changes to ePathway Applications, Licensing and Customer Request modules have introduced a 'Single Line' data type (question type) within the Pathway 'Questions' facility. The 'Single Line' 50 character 'string' Question Type can be used as an alternative to the existing 'Comment' question type. (The

'Comment' field is a multi-line 'memo' field which ePathway renders as a 'Memo' (multi-line) text box on the web page. The 'Single Line' question type by contrast is a straight 50 character 'string' entry field.)

NOTE: Existing Questions should never have their Question Type modified. For example, rather than changing a Question Type from Comments to Single Line, it is recommended that you create a new Question with the Question Type set to Single Line. This rule applies to all Question Types.

**Values**
Selection of this detail button displays the Answer Value Maintenance form which enables the user to set up a list of possible answers to the question.

**If Equal To**
This field is only available where the Question Type is Boolean. It will allow you to skip questions based on a specific Yes or No response by the customer.

This field has a drop down button to select from:

- None
- Yes
- No

The field is designed to allow the user to set up questions when the user answers Y or N to the question then they may skip to another question depending on how the Questions have been set up.

**Skip To**
This field allows the user to enter the Question number that the operator may skip to depending on the answer given as the Request is being taken over the phone.

If the response to a "Boolean" type question is required to go to the end of the Questionnaire then the Skip To value should be a value greater than the last question number.

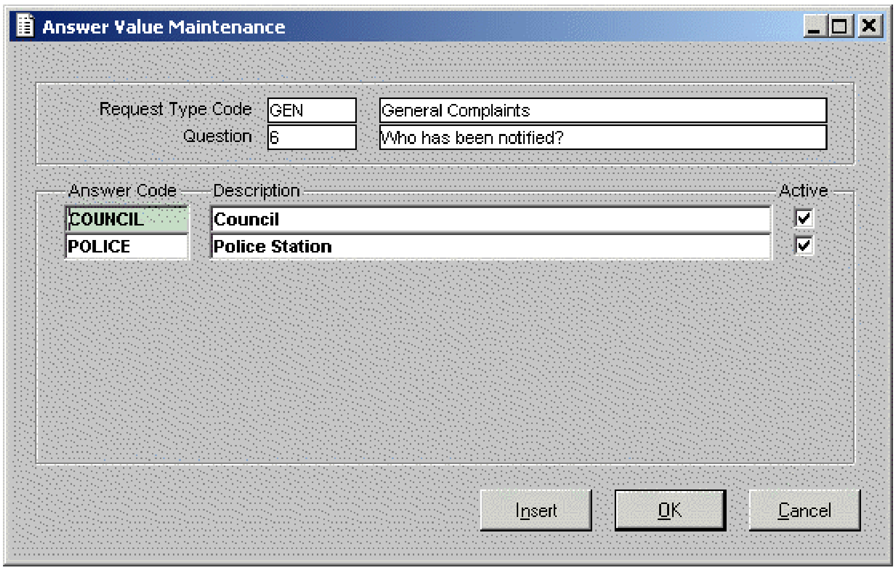
**Active**
This flag is automatically set on when a new Question is created. A Question may be 'retired' when it goes out of date or is no longer required – simply by setting the Active flag off. A Question may be 'reactivated' by setting the Active flag on.

**Effective From/Effective To**
These fields are Optional. If desired, enter the date from which the Question becomes effective.
An 'Effective From' date may be entered with or without an 'Effective To' date.
If desired, enter the date to which the Question is effective.
If an 'Effective From' date was specified, then the 'Effective To' date must not be earlier than the 'Effective From' date

NOTE: If 'Effective From' and/or 'Effective To' dates are specified then these are used in conjunction with the Active flag to determine if the Question should be displayed when a Questionnaire is being answered in Request Maintenance. i.e. A question will only be displayed for answering in Request Maintenance if it is Active and the current system date falls within the 'Effective From' / 'Effective To' dates (if specified).

## Answer Value Maintenance Form

This form allows the user to set up a list of possible answers to a Question in multiple-choice format.




*Answer Value Maintenance Form*

**Request Type Code**

These fields display the selected Request Code and Description.

**Question**

These fields display the details of the Question being maintained.

**Answer Code / Description**

Enter a Code and Description to identify each option as a possible answer to this question.

**Active**

Check this flag ON to make this answer available for selection on this form.

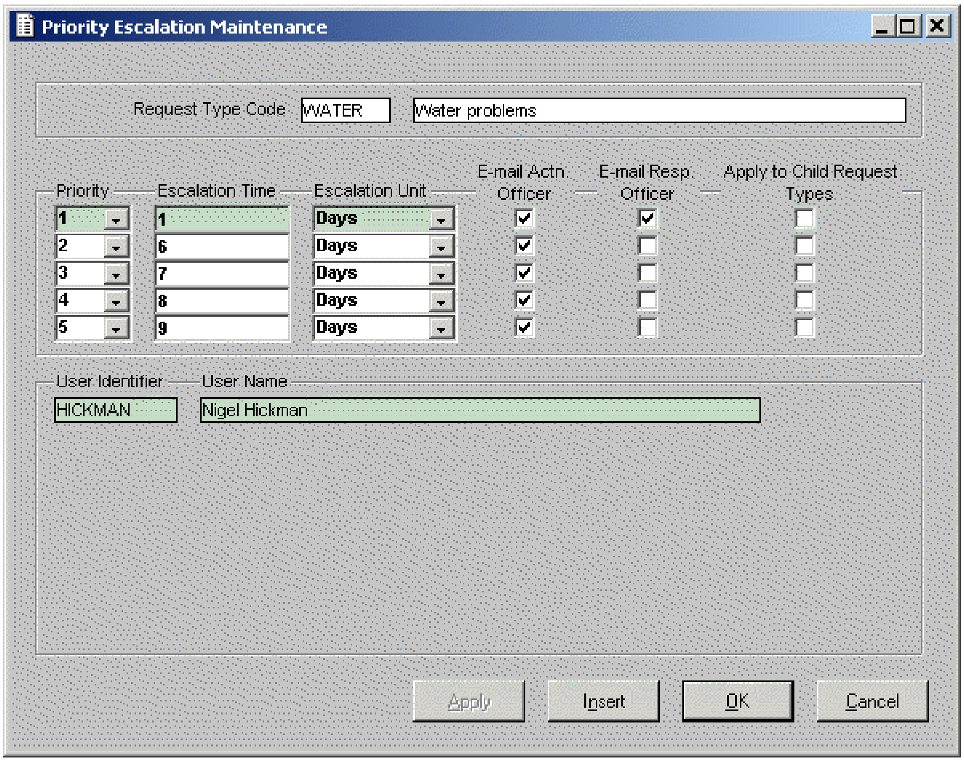
## Priority Escalation Maintenance Form

For each priority, the ability to define the escalation time period is available.
For example:
Priority 1 – Escalate after 4 hours
Priority 2 – Escalate after 2 days
Priority 3 – Escalate after 5 days
Priority 4 – Escalate after 15 days
Priority 5 – Escalate after 30 days
The units available for the escalation time period match those that are available for the duration of the Request Type. i.e. Minutes, hours, days, weeks, months and years.

The user is able to flag whether the Actioning Officer and/or Responsible Officer of the Request will receive an e-mail message each time the Priority is escalated. Also, for each priority escalation, the user can nominate Users/Officers to receive e-mail messages when the Priority on the Request is reached.

**Note:** This may differ for each priority level. If a request reaches priority 2 it may be that a manager needs to be notified as well as the Responsible Officer.

**Note**: When a request has previously been Completed (i.e. by adding a Completion Status) but then has its status modified to a Not Completed status a job is sent to the Priority escalation queue if the Automatic Priority Escalation and Background Priority flags are checked on.




*Priority Escalation Maintenance Form*

**Request Type**

These fields contain the code and description of the Request Type for which the Priority Escalation is being established.

**Priority**

This field allows a Priority Escalation Level to be selected from the dropdown. There are 5 Priority Levels from which to choose.

**Escalation Time**

The user is able to select the length of time before escalation for each Priority value. A number should be entered in this field.

**Escalation Unit**

An Escalation Unit may be selected from the drop-down. The available options are:

- (none)
- Minutes
- Hours
- Days
- Weeks
- Months

**E-mail Actioning Officer**

This flag allows the user to specify whether the Actioning Officer will be e-mailed when the Request Priority is escalated for each Priority value.

**E-mail Responsible Officer**

This flag allows the user to specify whether the Responsible Officer will be e-mailed when the Request Priority is escalated for each Priority value.

**Apply to Child Request Types**

Check this flag on if the Priority Escalation parameters are required to be applied to any Child Request Types.

**User/Officer**

When focus is on a Priority Escalation occurrence, the Insert Button allows insertion of other Users/Officers that will be emailed upon escalation from that Priority. The selected names will be added to the bottom section of the form.

**Apply Button**

Selection of the Apply Button displays the Child Request Type Priority Escalation Maintenance form to enable Priority Escalation parameters to be set for any child Requests..

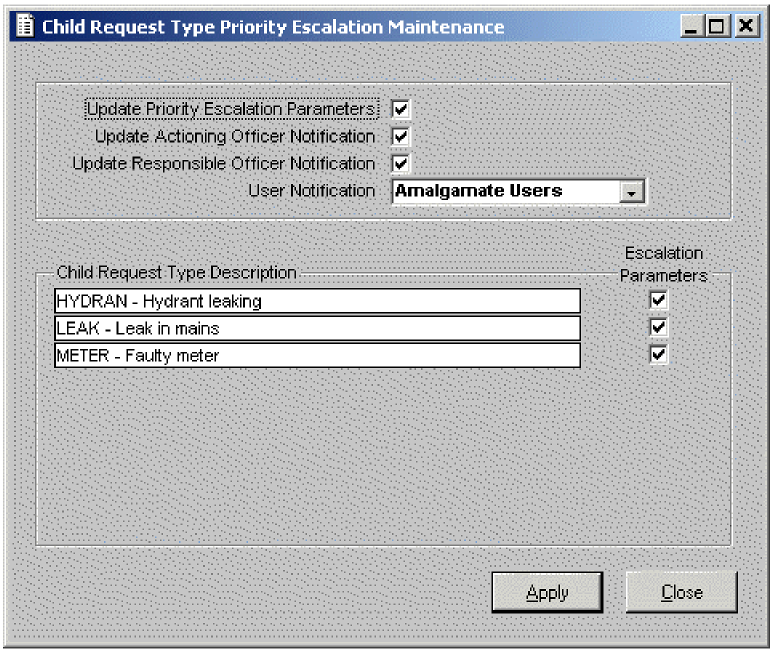
## Child Request Type Priority Escalation Maintenance Form

When maintaining a Request Type, the ability exists to apply the same Priority Escalation parameters to any child Requests.

The ability to multi select which child requests to update is available.

If a child Request Type is being maintained (and there are child Request Types for this Request Type) then when updating Priority Escalation Parameters to child Request Types the Parameters will be sourced from the current Request Type and not the parent of the child Request Type.
E.g.:
Request Type A has child Request Types B and C.
Request Type B has child Request Types D and E.
If updating the Priority Escalation Parameters from Request Type A then all children Request Types (B, C, D, E) will inherit these changes.

If updating the Priority Escalation Parameters from Request Type B then all child Request Types (D, E) will be updated and the Priority Escalation settings will be sourced from B and not A. (This assumes of course that the Request Types were selected to be updated.)




*Child Request Type Priority Escalation Maintenance Form*

**Update Priority Escalation Parameters**

If this flag is set on then this will update the Priority Escalation settings (i.e. for Duration Amount and Duration Type) with what is set at the Parent Request Type. If this flag is set off then no changes will be applied.

### Update Actioning Officer Notification

If this flag is set on then this will update the Actioning Officer Notification to what is set against the Parent Request Type. If this is set off then no changes will be applied.

### Update Responsible Officer Notification

If this flag is set on then this will update the Responsible Officer Notification to what is set against the Parent Request Type. If this is set off then no changes will be applied.

### User Notification

This parameter has three values:

- Amalgamate Users - This will amalgamate the Users who are to receive notification messages at each Priority Escalation level.
- Replace Users - This will replace all users who are to be notified at each Priority Escalation level with whatever is set at the parent Request Type.
- No Updates to Users - This will not update any User information on the child Request Types.

### Child Request Type Description

This field displays the Child Request Type and Description. This field is display only. Multi-selection of Child Request Types is available

### Escalation Parameters

This flag will be checked on if Priority Escalation has been inherited from the parent Request Type. This flag is not able to be maintained.

### Apply Button

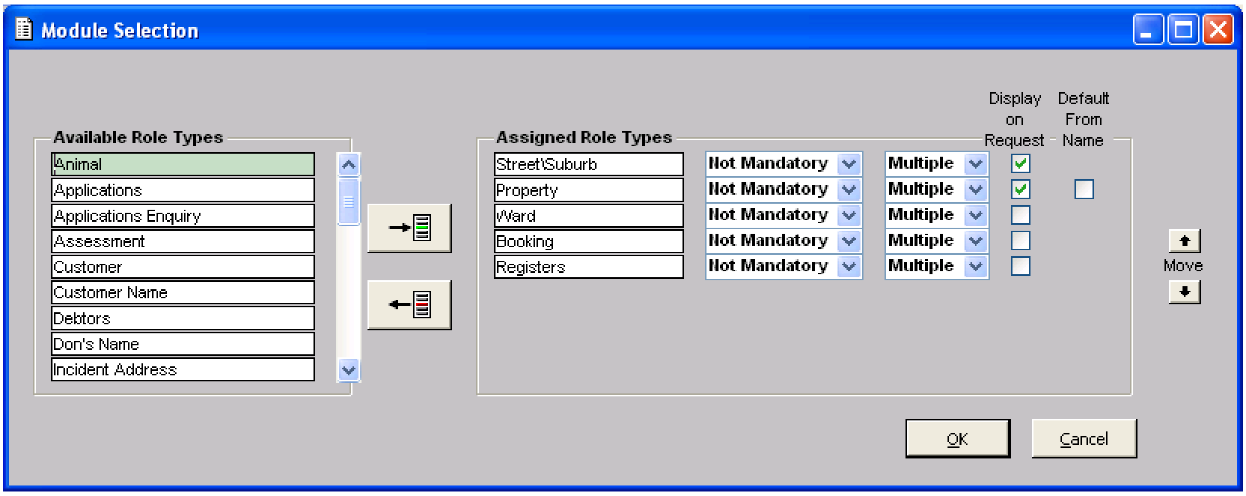
The Apply button should be selected after selecting the Child Requests to which you wish to apply the Priority Escalation Parameters selected in the previous form.

## Module Selection Form

The Module Selection Form a gives the user the ability to assign Applications Roles to Requests, these may be then assigned during registration of a Request.

The fields will be displayed as unassigned when this form is first entered, and the user need only highlight the application required and press the Select button located in the centre of the form.

This will then assign as many of the applications as required. To de-assign an application, simply highlight the one to de-assign and press the Remove button located in the centre of the form. This will then move the application to the available options.




*Module Selection Form*

**Available Role Types**
The user may assign one, several or all of the Role Types that can then be assigned to each specific Request. The Select and Remove buttons may be used to move Role Types from one side to the other. The available Roles are:

- Animals
- Infringements
- Assessments
- Applications
- Licensing
- Property
- Street/Suburb Links
- Names
- Registers
- Wards

**Note**: Ward module links may be also be created automatically when a Property or Street/Suburb link is created as long as the flags "Link Ward from Property" and/or "Link Ward from Street/Suburb" are set on in the parameters.

**Select/Remove Buttons**

The Select/Remove Buttons may be used to move Role Types from the 'Available' side of the form to the 'Assigned' side and vice versa. Click OK to save these changes.

**Assigned Role Types**
The assigned Role Types section will detail the actual Roles that have been selected for use.

**Mandatory/Not Mandatory**
If Mandatory is selected then the user will be forced to select a record from another module to link to the request being entered.

**Example**
If Mandatory is selected against the Property role link then the user must select a Property record to link to the request.

If Not Mandatory is selected then the user will not be forced to link the request to another record. The link is available however will not be mandatory.

**Single/Multi Roles**
If Single is selected then the user will only be able to select one record to link to the request being entered.

**Example**
If Single is selected against the Property role link then the user may only select one property record to link to.

If Multiple is selected then the user may link to as many records as required.

**Example**
If Multiple is selected against the Property role link then the user may select only one or many property records to link to.

**Display on Request**
The Display on Request flag may be assigned to three module links. The modules flagged will be displayed on the main Customer Request maintenance form. Additional module links can be selected, but can only be entered via the Module Option button.

**Example**
If the Property role link is flagged to display on request then the property address selected by the user will

be displayed on the Customer Request maintenance form. If more than one property address has been selected only the first address will be displayed.

**Default from Name**

The 'Default from Name' flag is only visible on Property Role Types. When checked ON a Property Link may be automatically generated when a Name is linked to a Customer Request record, provided there is a Property in the system that matches the Default Address of the Name selected. The following assumptions are made about Name Addresses and Property Addresses in order for matching to occur:

- Unit details in Name Addresses are separated from House number details by either a comma (,), a slash (/) or a space.
- From and To house numbers in Name Addresses are separated by a hyphen (-)
- The Default address of the selected Name is only matched against Primary Addresses in Property
- Streets and Suburbs on the Name Address are linked to Streets and Suburbs in Property

Note: Matching on addresses containing Level details is not currently available. Also note that if more than one possible Property match is found then no Property link is created.

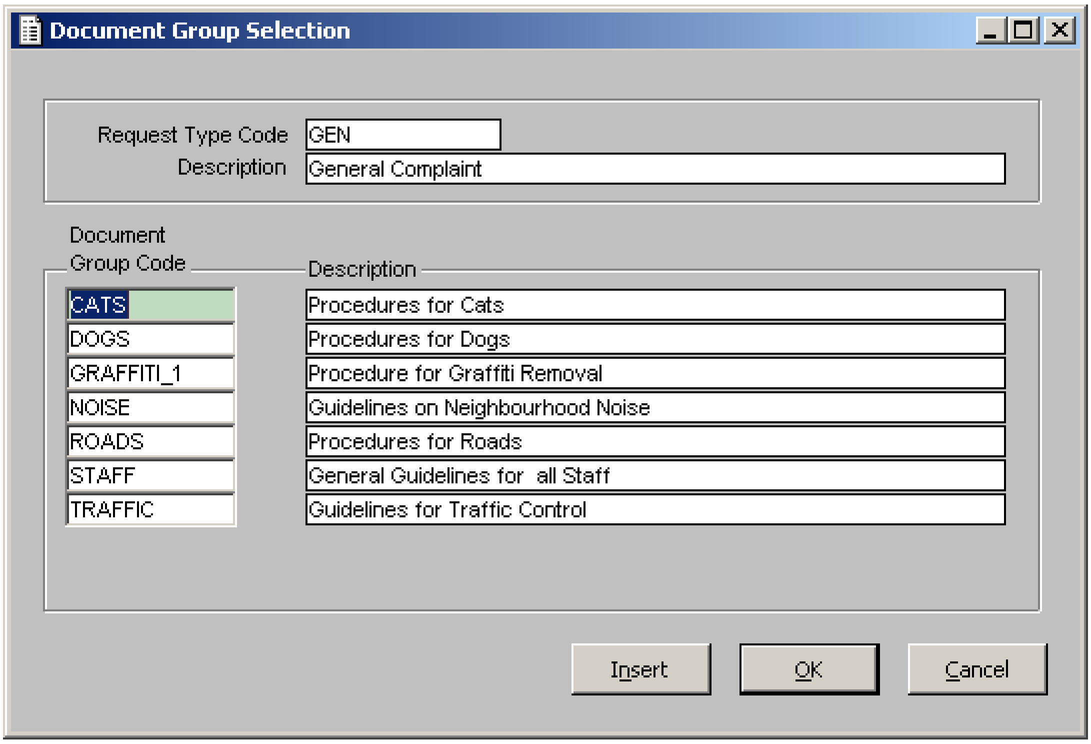
Note: When a Name link is deleted from this form a message will now display "Associated Property Role Link(s) may also require deletion"; where there are Property Links to the request and those Modules have the "Default From Name" flag checked on.

**Move Buttons**

The Move Buttons may be used to re-order the Role Types into a different sequence.

## Document Group Selection Form

The document Group Selection form displays all document groups linked to a Request Type. New Groups may be added using the Insert button. Documents associated with these groups will be available for selection and viewing when the Policy and Procedure Documents menu option is selected from within a Request (with the ability to view all other groups if specified).



*Document Group Selection Form*

**Request Type Code/Description**

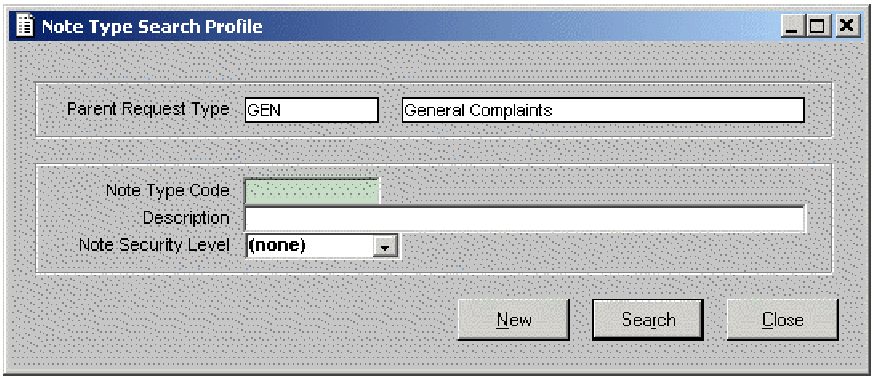
These fields contain the code and description of the Request Type. They are display only and cannot be maintained.

**Document Group Code/Description**

These fields display the Documents linked to the Request Type. New Documents may be added by clicking the Insert button to add a blank occurrence and then keying in a Document Code, or alternatively, selecting one from the Pop Up.

## Note Type Search Profile Form

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




*Note Type Search Profile Form*

**Parent Request Type**

This field displays the Parent Request Type to which the Note Type is linked.

**Note Type Code**

This field allows the user to search via the Note Type Code. Enter a Code and click the search button, or alternatively, a combination of fields may be used. Leaving all Search Profile fields blank will retrieve all Note Types.

**Description**

This field allows the user to search via the Note Type Description. Enter a Description and click the search button, or alternatively, a combination of fields may be used. Leaving all Search Profile fields blank will retrieve all Note Types.

**Note Security Level**

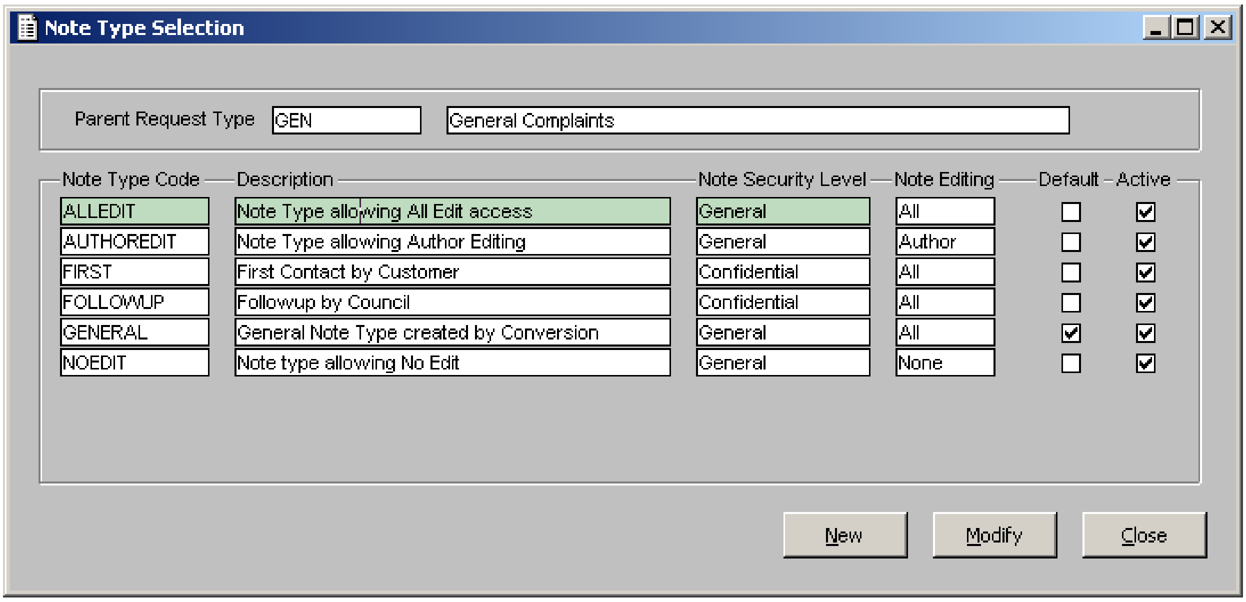
This setting allows the user to search via the Note Security Level. Four options are available:

- (None)
- General
- Restricted
- Confidential.

## Note Type Selection Form

The Note Type Selection form will display if there is more than one Note Type defined. It will list the details of the available Note Types, as well as allowing existing Note Types to be maintained and new ones to be entered.

A Note Type may not be deleted if it is referenced by any existing Request Notes, or if the Note Type is the Default for the Request Type.




*Note Type Selection Form*

**Parent Request Type**

This field displays the Request Type for which the Note Types are defined.

**Note Type Code**

This code is used to identify this Note Type.

**Description**

This field contains the description of the Note Type.

**Note Security Level**

This field displays the Note Security level of each Note Type.  Four options are available:

- (None)
- General
- Restricted
- Confidential.

**Note Editing**

The Note Editing field displays the editing access allowed on the Note. Three options are available as follows:

- All – will allow all users to edit the note.
- Author – will allow only the author to edit the note.
- None – will not allow any user to edit the note (unless they have Supervisor access).

**Default**

This flag will be checked on if this Note type has been set as the default.  Only one Note Type may be set as the default.  This flag is not maintainable from this form.

Note:  You cannot uncheck the Default Note Type flag on the default Note Type.  You must select another Note Type and check on its Default flag instead.  An inactive Note Type cannot be made the Default.

**Active**

This flag will be checked on if this Note Type is active and available for use.  This flag is not maintainable from this form.

## Note Type Maintenance Form

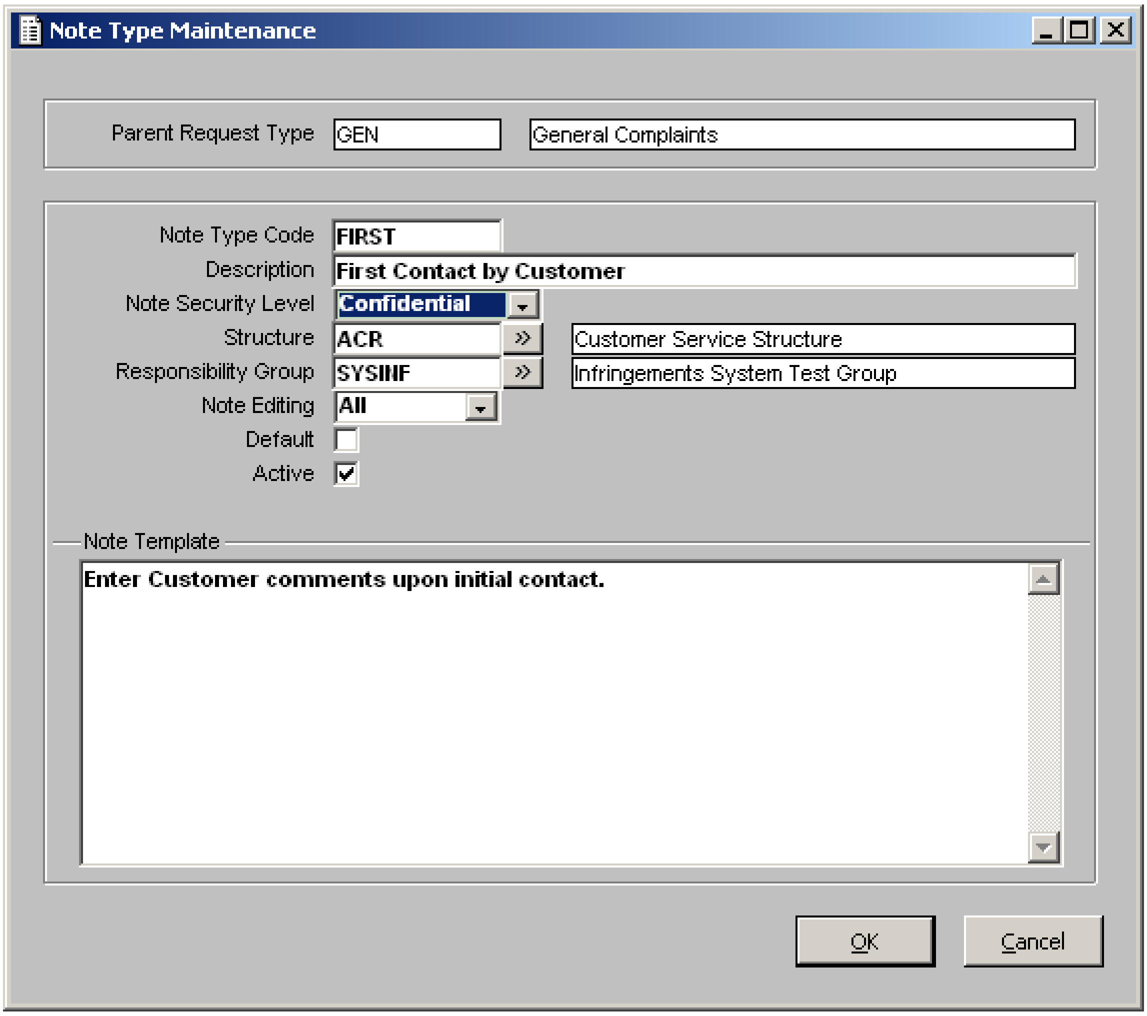
This form allows the user to define and maintain Note Types. Note Types provide a set of default, or template, parameters for use when entering Request Notes. Note Types are assigned to high level Parent Request Types and are inherited for all the children of the Request Type.

Note Types may be deleted if they are not referenced by any existing Request Note, and/or they are not the Default Note Type.

**Note Security**
The "Note Editing" field provides control on the editing of Notes. It provides three options as follows:

- All - allow all users to edit the note.
- Author - allow only the author to edit the note.
- None - not allow any user to edit the note (except with Supervisor access)

Note: Where a user has Supervisor Editing on Notes authority, they are able to access the "Note Editing" field against a Note to change the setting of this field. Also they are able to edit the Note without having to change the "Note Editing" option.



*Note Type Maintenance Form*

**Parent Request Type**
This field displays the Request Type for which the Note Type is defined. Note Types can only be defined for Parent Request Types.

**Note Type Code**

This code is used to identify this Note Type, e.g. GENERAL, INITIAL etc

**Description**
This field contains the description of the Note Type, e.g. General Enquiry

**Note Security Level**
This setting allows the definition of the 'sensitivity' level of any Note based on this Note Type. Three options are available – General, Restricted and Confidential.

- If 'General' is selected, the Note details will be available to all users of Pathway and the information can be supplied to both Council staff and the public.

- If 'Restricted' is selected, the note details will be available to all users of Pathway (i.e. there is no restriction on what is displayed and who is able to view it). It allows a council to record information against a request which may be of a sensitive nature and may need to be restricted from view to the general public. Note, however, that the 'Restricted' status is merely a reminder to Council staff of the potential sensitivity of the Note contents.

- If 'Confidential' is selected, only users that have access to Pathway as determined by the Responsibility Structure and rules will have access to the note details.

**Structure and Responsibility Group**

For Confidential Notes, the nomination of a Structure and Group determine which Pathway users are able to view or work with the Note.

**Note Editing**
In order to meet legislative requirements relating to the Freedom of Information Act, security may be applied to Request Notes. The Note Editing field provides control on the editing of Notes. It provides three options as follows:

- All - Allow all users to edit the note.
- Author - allow only the author to edit the note.
- None – will not allow any user to edit the note.

Where a user has Supervisor Editing on Notes authority, they are able to access the "Note Editing" field against a Note to change the setting of this field. In addition they are able to edit the Note without having to change the "Note Editing" option.

**Default**
This flag determines which Note Type is the default for the Request Type. This Note Type will be used to set the initial values of any new Note created for the Request Type.

**Note**: You cannot uncheck the Default Note Type flag on the default Note Type. You must select another Note Type and check on its Default flag instead.

**Active**
This is the standard flag for de-activating a Note Type.

**Note Template**
This field may be used to set up default text as a template to display whenever this Note Type is used.

## E-Mail Parameter Maintenance Form

E-Mail parameters provide the definition of how the system will handle the sending of e-mails when requests are assigned and/or Notes added or maintained. Using the e-mail parameters it is possible to control how and when e-mails are sent. The E-Mail Parameter Maintenance form allows for the addition of up to five e-mail parameters, one for each Priority that a Request may have.

**Note:** Without any e-mail parameters defined the system will no longer send e-mails by default.

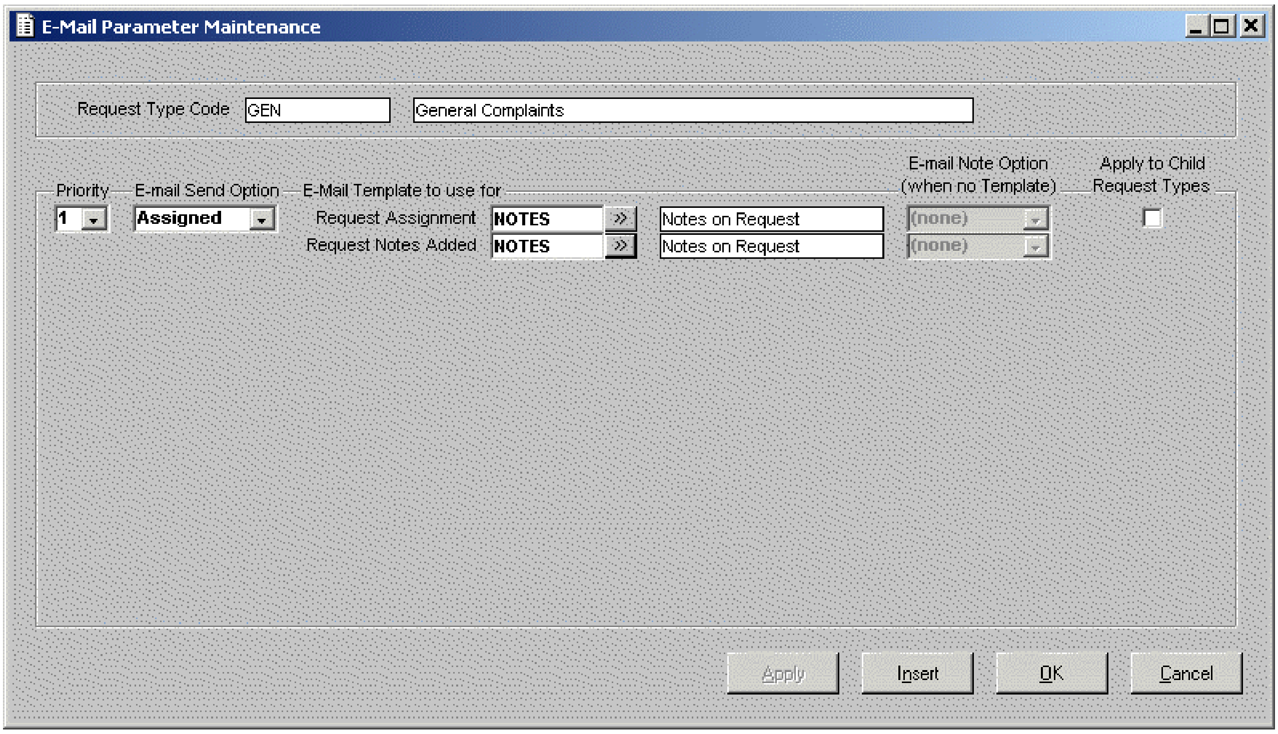
For each Priority the following options can be set:

- E-Mail Send Option – When to send an e-mail
- E-Mail Template to use for – Merge Type to use for generating an e-mail when a Request is assigned or Notes are added
- E-Mail Note Option – How to handle Notes for internally generated e-mails (i.e. no Template has been selected) when a Request is assigned or Notes are added.
- Apply to child Request Types – Allows the parameter details for the Priority to be applied to children of the current Request Type (if it is a 'Parent').

The email will contain an attachment shortcut, i.e.

,

which, when double clicked, will open a new session of Pathway and display the relevant Request. A check will be done to ascertain if the current user has authority to Request Maintenance. If they do not have the Maintenance option available, then Request Enquiry will be checked instead. If neither option is available, then an error message will be displayed, otherwise the appropriate option will be executed.




*E-Mail Parameter Maintenance Form*

**Request Type Code**

These fields display the selected Request type Code and Description. These fields are display only.

**Priority**

This field allows a Priority level to be selected from the dropdown list.

**E-Mail Send Option**

This option determines when an e-mail is to be sent to an Actioning Officer. The available options are:

- No E-Mail – No e-mails are sent
- Assigned – An e-mail is sent when a Request is assigned to an Actioning Officer
- Notes – An e-mail is sent whenever Notes are added or maintained
- Always – An e-mail is sent in all cases

**E-Mail Template to use for – Request Assignment**

This field allows the user to name a standard 'LETTER' Merge Type to be used for constructing the text of the e-mail. The Merge Type should only use 'plain text' formatting, i.e. no tables or drawings etc.
An e-mail template may be specified for each of the 'Assigned' and 'Notes Added' versions of e-mail messages.

**E-Mail Template to use for – Request Notes Added**

This field allows the user to name a standard 'LETTER' Merge Type to be used for constructing the text of the e-mail. The Merge Type should only use 'plain text' formatting, i.e. no tables or drawings etc.
An e-mail template may be specified for each of the 'Assigned' and 'Notes Added' versions of e-mail messages.

**E-Mail Note Option (when no template)**

This field is available when no E-Mail Template has been named. In this case a 'standard' internally generated Text message will be built. The E-Mail Note Option allows you to specify how any Notes are to be handled on the e-mail. The available options are:

- None – No Note details will be included. The Text of the message will be as per the System Parameter message definitions
- Added Note – The most recently added Note will be included in the text of the e-mail message
- All Notes – All Notes on the Request will be included in the e-mail message. (The Notes will be included in descending Date/Time order)

**Apply to Child Request Types**

This check box will be available on Parent Request Types. This flag allows the user to set a group of parameters to many Request Types without having to maintain each one individually.
Clicking the 'Apply' button displays the secondary form, 'E-Mail Parameter Maintenance'.

## E-Mail Parameter Maintenance Form (secondary)

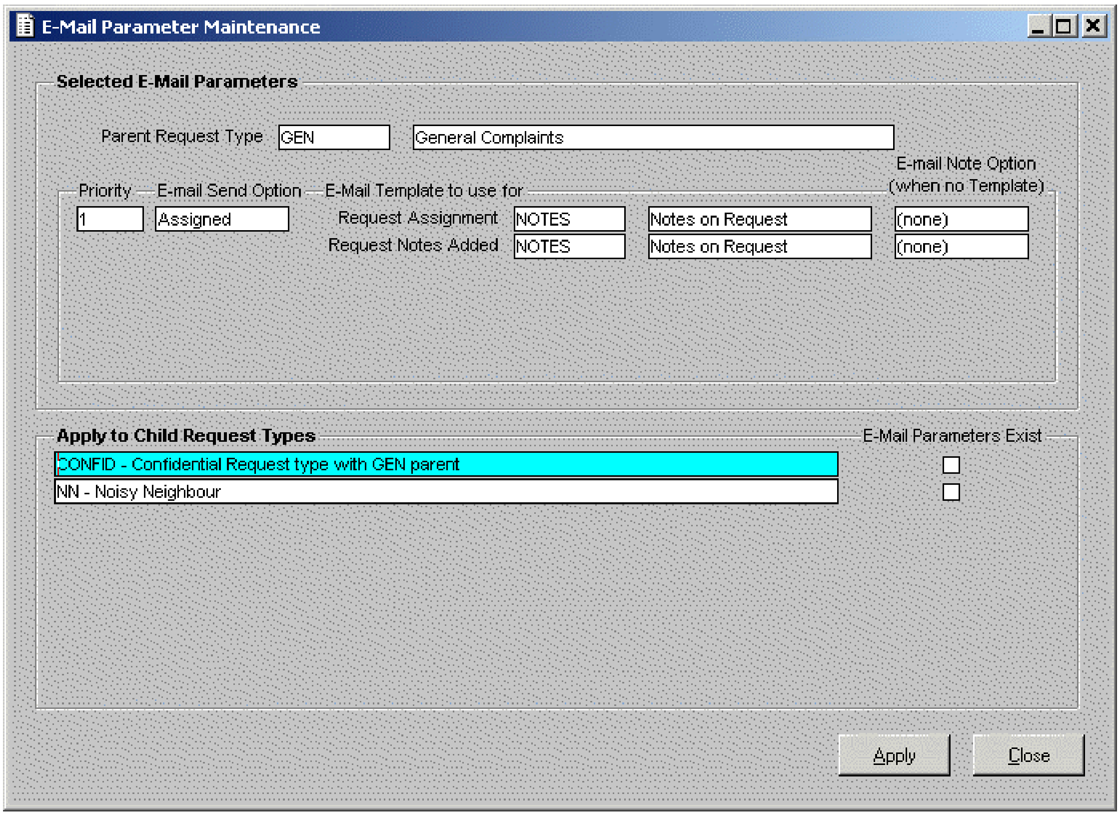
The secondary E-Mail Parameter Maintenance form displays when the 'Apply' button is clicked on the primary E-Mail Parameter Maintenance form.
This form shows the parameters that have been selected for application to the Child Request Types. It also displays a list of all the Request Types that are children of the current Request Type. The descriptions of the Request Types are indented to indicate their hierarchy. A checkbox indicates if any e-mail parameters already exist for the Child Request Types.
The user may multi-select from the list of Child Request Types, and click 'Apply' to have the selected e-mail parameters applied to those Request Types. If an e-mail parameter exists for a given priority, then its values will be overwritten by the selected parameter values. Otherwise the e-mail parameter will be created based upon the selected parameter values.

**Note:** Unlike Note Types that are defined for the highest level Parent Request Type and are then inherited by ALL the Child Request Types, E-Mail parameters must be defined for all Request Types and Priorities where you require e-mail functions.

The generation of E-Mail messages is automatic based upon the settings described above. However, due to the fact that Microsoft Word document Merge functions are now supported in the construction of the e-mail messages, it has been necessary (for performance reasons) to define a new Asynchronous E-Mail Process function to allow the construction and sending of the e-mails to occur on a system other than the user's desktop. It is recommended that an ACR (Customer Service) specific Job Queue be created and defined as the 'Background' processing queue to be used by Customer Service. You should then ensure that this Job Queue is started on a Batch Job Queue Server.

**Note:** It is important that the machine used has an E-Mail Client configured and has Microsoft Word available. The e-mails sent to the Responsible Officers will appear to be 'From' the user who is logged on to the Batch Job Queue Server.

If the Job Queue is not started then e-mail generation and sending will occur interactively from the Client Desktop PC. For internally generated text messages this is not very different from the previous functionality. However, for Merge Type generated messages, this could cause considerable inconvenience to the Customer Service user.




*E-Mail Parameter Maintenance Form (secondary)*

### Parent Request Type

These fields display the selected Parent Request Type and Description.

### Priority

This field displays the selected Priority.

### E-Mail Send Option

This option displays the parameter which has been set up to determine when an e-mail is to be sent to a Responsible Officer. The available options are:

- No E-Mail – No e-mails are sent
- Assigned – An e-mail is sent when a Request is assigned to a Responsible Officer
- Notes – An e-mail is sent whenever Notes are added or maintained
- Always – An e-mail is sent in all cases

### E-Mail Template to use for – Request Assignment

This field displays the Merge Type to be used for constructing the text of the e-mail.

### E-Mail Template to use for – Request Notes Added

This field displays the Merge Type to be used for constructing the text of the e-mail.

### E-Mail Note Option (when no template)

This field displays how any Notes are to be handled on the e-mail. The available options are:

- None – No Note details will be included. The Text of the message will be as per the System Parameter message definitions
- Added Note – The most recently added Note will be included in the text of the e-mail message

- All Notes – All Notes on the Request will be included in the e-mail message. (The Notes will be included in descending Date/Time order)

**Apply to Child Request Types**
These fields display a list of all the Request Types that are children of the current Request Type. The user may multi-select from this list, and click 'Apply' to have the selected e-mail parameters applied to those Request Types. If e-mail parameters exist for a given priority, then its values will be overwritten by the selected parameter values. Otherwise the e-mail parameter will be created based upon the selected parameter values.

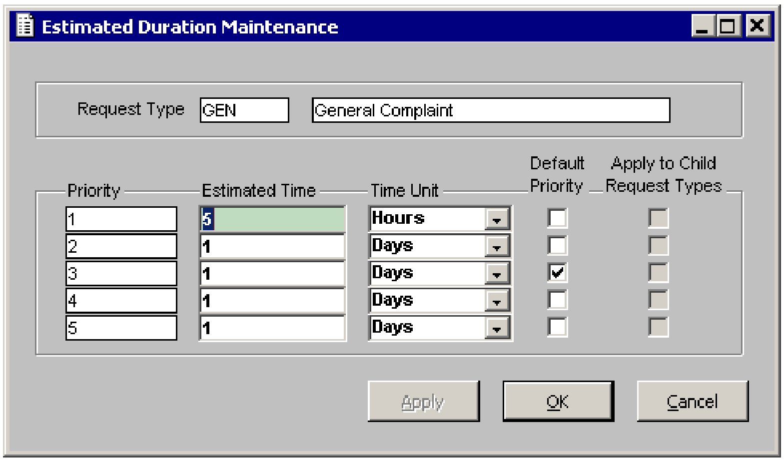
> **Note:** Unlike Note Types that are defined for the highest level Parent Request type and are then inherited by ALL the Child Request Types, E-Mail parameters must be defined for all Request Types and Priorities where e-mail functions are required.

**E-Mail Parameters Exist**
This checkbox will indicate if any e-mail parameters already exist for the Child Request Types.

## Estimated Duration Maintenance

The Estimated Duration Maintenance form displays when the Estimated duration Maintenance option button is selected on the Request Type Maintenance form. It allows the user to define the estimated duration for each Priority level (Note: This replaces the 2 fields, Estimated Time and Default Priority, which have now been removed from the Request Type Maintenance form). It allows the Priorities 1, 2, 3, 4 and 5 to be set up with the following Unit Types – Minutes, Hours, Days, Weeks and Years. One Priority is able to be set as the default and will be used as the Priority when new Requests are entered. It is mandatory to enter values for all Priority levels.

The user is also able to apply the settings to all or some of the children of the Request Type.



*Estimated Duration Maintenance form*

**Request Type**
These fields display details of the selected Request Type. These fields are display only.

**Priority**
This field contains the available Priorities, 1, 2, 3, 4 and 5. These numbers are entered by the system and cannot be modified. It is mandatory to enter values against each Priority level.

**Estimated Time/Time Unit**
The Estimated Time field is used to enter a specific span of time to determine how long requests of this type will take to be completed. There are two fields, the first being a number, the second consisting of

the duration such as weeks, month's etc. This field determines the Date to Respond By field on each request based on the date the request was entered. This field is used in conjunction with the Calendar Format field. This field is mandatory.

The user is able to enter an Estimated Time (duration) for each Priority, which, together with the Time Unit field, specifies a time period after which the Request will be overdue, e.g. 2 Hours.

The user is able to select a Time Unit from the dropdown list to apply to the Estimated Time. The following options are available for selection:

- Minutes
- Hours
- Days
- Weeks
- Months
- Years

**Example**
The Estimated Time is nominated as two days
Calendar Format is Working Days.
If a request is entered at 10:00 am on a Friday morning the Date to Respond By will be 10:00 am on Tuesday (assuming Saturday and Sunday are non-working days)

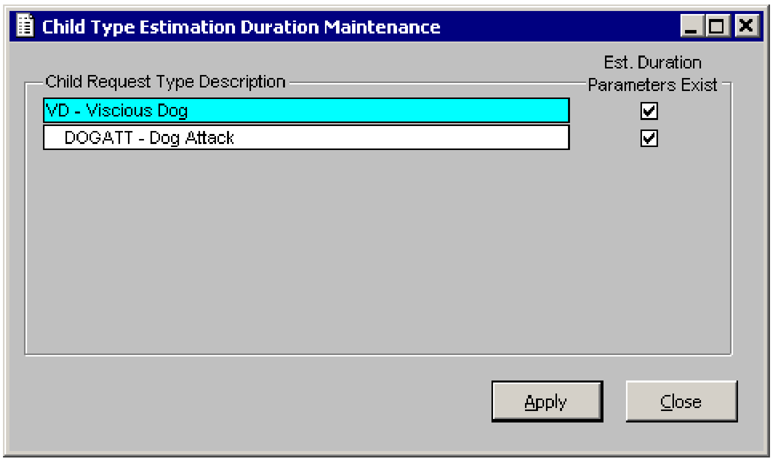
**Default Priority**
The user is able to select one Priority to be the Default Priority. This will be used as the Priority when new Requests are entered for this Request Type.

This field is mandatory and may not be bypassed.

**Apply to Child Request Types**
The user is able to apply the settings on this form to all the 'children' of the Request Type in a similar fashion to that available in Priority Escalation Maintenance, by checking ON the 'Apply to Child Request Types' indicator and selecting the Apply button. Once this is done, the user may nominate which Child Request Types are to have similar priorities applied.

## Child Type Estimation Duration Maintenance Form

This form display when the Apply button is selected on the Estimated Duration Maintenance form. It displays all the Child Request types which are able to have the Parent Estimation Duration parameters applied.




*Child Type Estimation Duration Maintenance form*

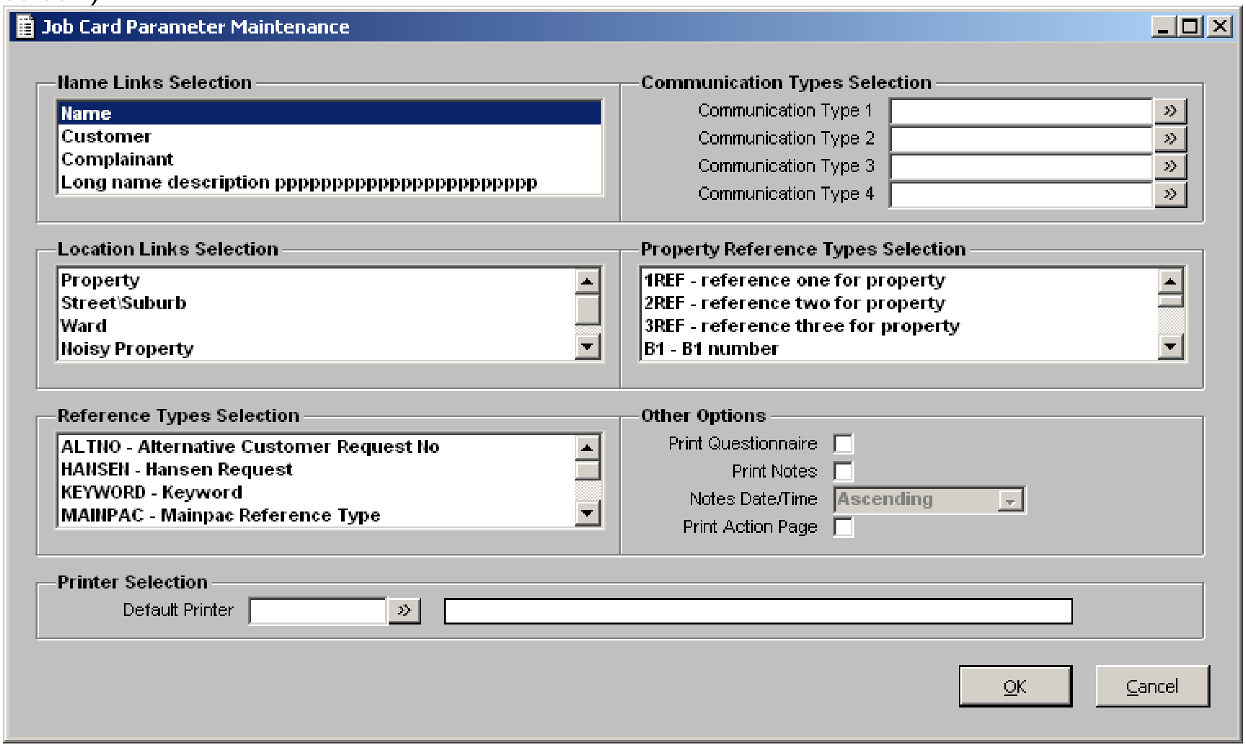
**Child Request Type Description/ Estimated Duration Parameters Exist**

These fields display any ‘Child’ Request Types that exist for the ‘Parent’ Request Type, as well as a flag to indicate whether Estimated Duration Parameters already exist. The user may select (highlight) one or more Child Request Types to which to apply the Parent parameters. Multiselect is available on this form. Selection of the Apply button completes the process.

## Job Card Parameter Maintenance Form

The Job Card Parameter Maintenance form displays when the ‘Print Job Card Parameters’ option button is selected on the Request Type Maintenance form. It allows the user to nominate Name Links, Location Links, References, a Questionnaire, Notes and an option to Print the Action Page.

If Job Card Parameters are set up here they will override any parameters set up at the Customer Service System Parameters level. If Job Card Parameters are not set up at the Request Type level, then the System Parameters Job Card Parameters will be used. (However, if System Parameters Job Card Parameters are not defined, then the Job Card button will not be available on the Request Selection screen.)



*Job Card Report Parameter Maintenance form*

**Name Links Selection**

The Name Link Selection field allows the selection of the Module Link that represents the “Customer” or the “Client” of the Job Card. When the Name details are printed, the mailing address of the name will also be printed. In the case of multiple names for the link against the Request, all names and mailing address will be printed.

When the name module link is defined, the ability to select up to four (4) Name and Address Communication Types is also provided to allow contact numbers to be extracted onto the Job Card.

**Location Links Selection**

The Location Link Selection field allows the selection of the Module Links that represent the location of the issue. Any Property based link will be able to be selected, i.e. Any Property or Street/Suburb based link. The ward Module link will also be available for extraction.

When the Location Links are printed, the formatted location details will be displayed as per current on-screen functionality.

For each Property Link the ability to select Property References is available. The user may nominate which references to extract to the Job Card.

**Reference Types Selection**
The Reference Types Selection field displays the Reference Types that are available in Customer Service. The user is able to select which Reference Types are to be printed on the Job Card.

**Communication Types Selection**
When the name module link is defined, the Communication Types Selection fields allow the user to select up to 4 Name and Address Communication Types to allow contact numbers to be extracted onto the Job Card.

**Property Reference Types Selection**
For each Property Link the user is able to select Property References. The user may nominate which references to extract to the Job Card.

**Other Options**
The user is able to nominate whether the **Questionnaire** details will be printed on the Job Card.

The user is able to nominate whether **Notes** should be printed on the Job Card and in which order they should be printed, i.e. Descending or Ascending Date Order. When the Report is printed, security relating to Note Types will take effect and any Notes which the user, who is printing the Job Card, does not have access to, will not be printed.

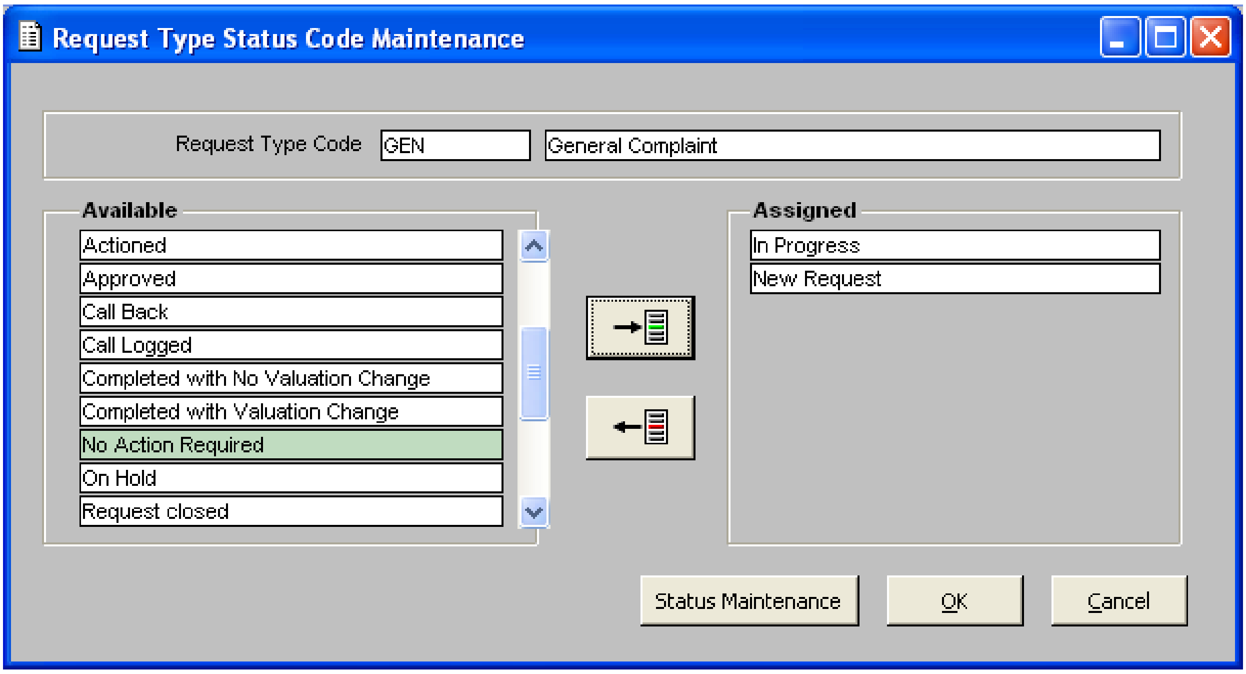
The **Print Action Page** option is an ON\OFF indicator which will default to OFF. This option requests that an Action Page be printed that will allow the Actioning Officer to record any actions taken for the Job. This will then allow data entry to occur once the Actioning Officer has returned and completed the job.

**Printer Selection**
The Printer Selection fields allow the user to define the "Printer" to be used. The list of Printers will be sourced from those defined within Pathway. The selected Printer will be used when printing the Job Card Report.

## Request Type Status Code Maintenance form

The Request type Status code Maintenance form is a select/remove form which allows one or more Status Codes to be assigned to the selected Request Type.

Note: This form will only display if the user is authorised to the Authorised Function: Status Codes at Request Type Level.




*Request Type Status Code Maintenance*

**Request Type Code**
The header displays details of the selected Request Type.

**Available Status Codes**
All active Status Codes are displayed in the Available frame. Any Status Codes that have already been assigned will no longer display on this side.

**Assigned Status Codes**
All Status Codes that have been assigned to the selected Request Type are displayed on the right hand side of the form.

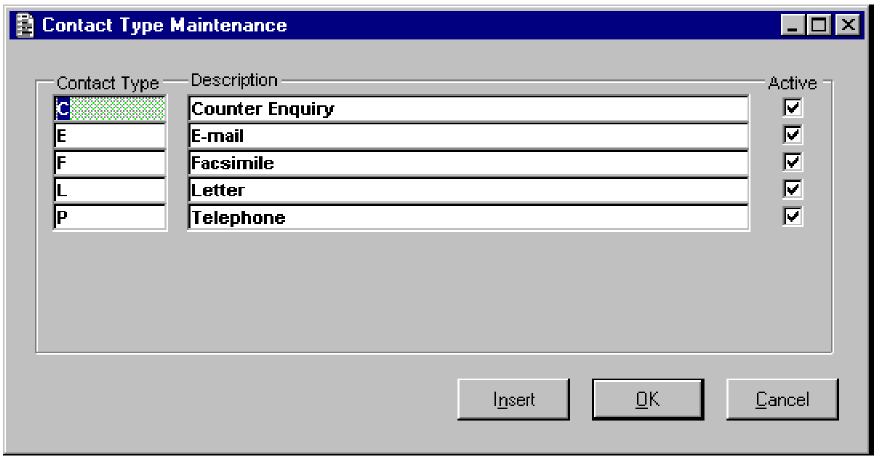
**Status Maintenance button**
When pressed, the [Status Maintenance] button will call the existing Status Maintenance form which allows addition/maintenance/deletion of Status Codes. Upon return to the Request Type Status Code Maintenance form, any changes made will be evident and any new Status Codes added will now be available to be assigned to the Request Type if desired.

# Contact Type Maintenance

This parameter allows the setting up of Contact Types that may be assigned to a Request. These may typically be items such as phone and fax etc. It describes how the request was received.

## Contact Maintenance Form

This form allows the user to enter Contact Types that may be assigned to the Request. These may typically be items such as phone and fax etc.




*Contact Maintenance Form*

**Contact Type**
This field consists of a 6 character code to be assigned to the Contact Type. The code may be alpha or numeric.

**Description**
This field allows the user to enter a more detailed description to assign to the Contact Type.

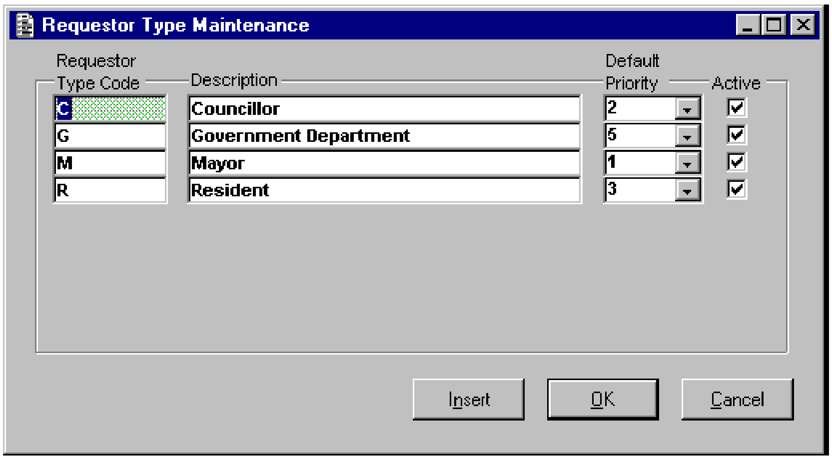
**Active**
If this field is checked off, the Contact Type may not be selected against a Request. Checking the field on allows the Contact Type to be available during Request Maintenance.

# Requestor Type Maintenance

The Requestor Type Maintenance parameter allows the establishment of a list of people and/or organisations that may make a Customer Request to the Council.

## Requestor Maintenance Form

Requestor Maintenance allows the user to create a list of people and/or organisations that may make a Customer Request to the Council.




*Requestor Maintenance Form*

**Requestor**
This field requires a code to be entered for each Requestor Type. These types may be things such as The Mayor, Council Staff, Rate-Payer etc. This is a ten character field and may be alpha or numeric.

**Description**
The Description field allows the entry of a detailed description for the Requestor Type.

**Default Priority**
This field allows a Default Priority to be entered against each of the Requestors. If the override priority is set on in Customer Service System parameters, this default may be changed.

The priority set here will override the priority set at the Request Type level.

**Example**
Request Type – Barking Dog has a priority of 3.
Requestor of type – Councillor has a priority of 2.
Requestor of type – Public does not have a default priority.

When a request is created for a Barking Dog complaint and has been submitted by a Councillor then the priority on the request will be defaulted to 2.

When a request is created for a Barking Dog complaint and has been submitted by a member of the Public then the priority on the request will be defaulted to 3.

**Active**
This field if checked allows for the Requestor Type to be used. If the field is unchecked, then the Requestor Type will not be available for selection when creating a Request.

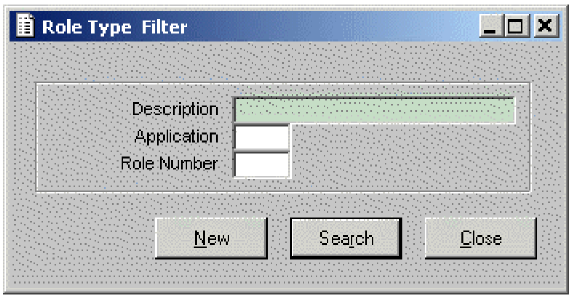
# Role Type Filter

The Role Type parameter is an “INFOR Only Function” for the creation of the specific Role Types required for use within the Customer Service System.

Users may also create their own Role Types based upon one of the existing Primary Role Types. The ‘New’ button allows users this facility.

## Role Type Filter Form

Role Type Filter form is an “Infor Only Form” for the creation and maintenance of the specific Role Types required for use within the Customer Service System. At present the user need not make any changes or additions to this form.




*Role Type Filter Form*

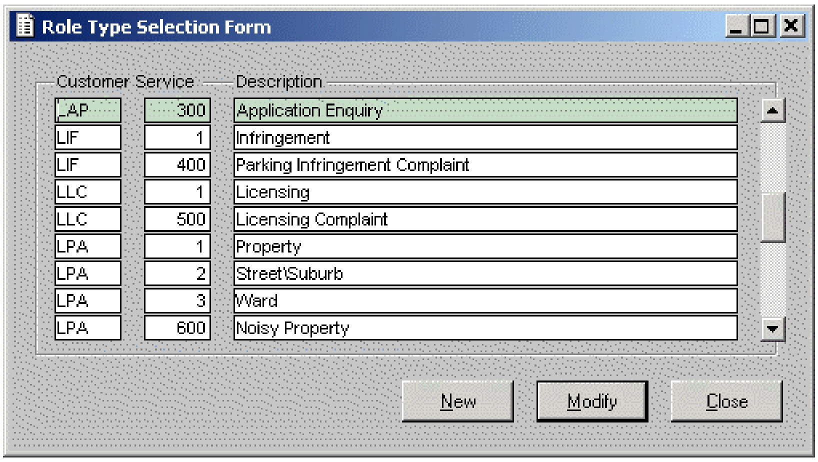
**Description**
Enter a role description (or part thereof) to limit your search. E.g. *Assess* will return all Role Types for Rate Assessments.

**Application**
Enter an Application code to limit your search. E.g. LLC will return all Role Types for Licensing.

**Role Number**
Enter a Role Number to limit your search. E.g. “1” will return all Role Type 1’s for all application Role Types.

## Role Type Selection Form

This form displays all role types that match the search criteria entered. The ‘New’ button allows the user to create new User-defined Role Types.




*Role Type Selection Form*

**Role Type**
This field displays the Role Type application code and Role Number.

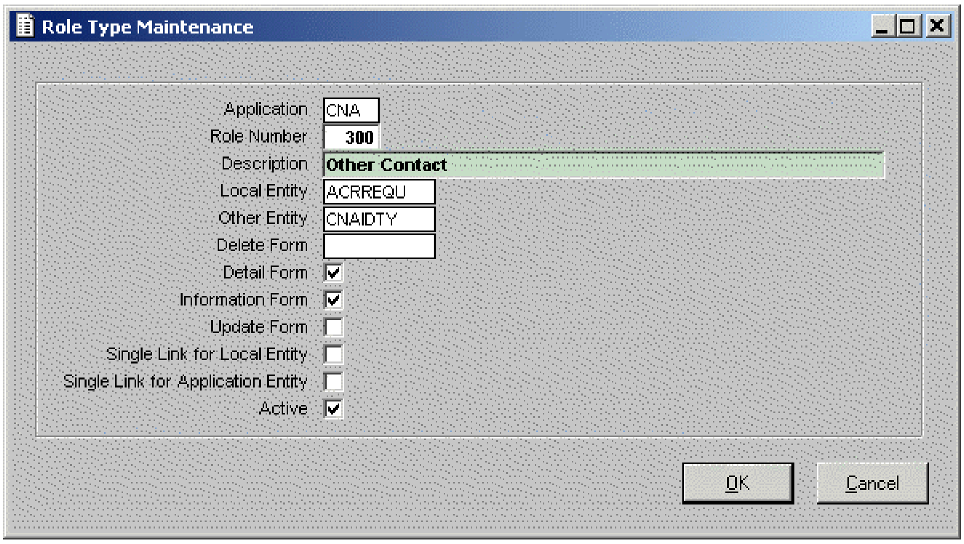
This field is display only and may not be maintained.

**Description**
This field displays the full description of the Role Type.

## Role Type Maintenance Form

This form displays all details relating to a specific Role Type. Details relating to Primary Role Types will be non-maintainable. Existing User-defined Role Types will only allow maintenance on the Description field. When creating new Role Types, only the fields 'Role Number' and Description' are available for input.

When creating User Defined Role Types, a 'reciprocal' Role Type will be created in the other application for Property (LPA), Rates Accounting (LRA), Registers (CRG) and Name & Address (CNA).




*Role Type Maintenance Form*

**Application**

Identifies the application that the Role Type applies to. This will always be an application within Pathway and it determines the application that is creating a relationship to Customer Service.

For example - If the application was CNA, Name & Address, then the relationship is from Customer Service to the Name & Address application.

**Role Number**
The Role Type Number is used to uniquely identify a relationship to an external application. The use of a Role Type Number allows many relationships to be created between an external application and Customer Service.

For Use Defined Role Types the Role Number must be greater than 99.

**Description**
This field contains the Description of the relationship between Customer Service and the external application. This field is maintainable for both user-defined Role Types and Infor-defined Role Types.

**Local Entity**
This field contains the entity name within Customer Service that the relationship exists with.

**Other Entity**
This field contains the entity name for the external application that the relationship exists with.

For example, in the case of a Name Role Type the ‘Other’ entity will be CNAIDTY.

**Delete Form**
This field contains the name of the Deletion form that is required for the Role Type. The deletion form determines if the Role Type can be deleted. In general a Role Type is not deleted once it has been issued to Customers.

**Detail Form**
If Detail Form is checked on, then for the "relationship" the ability exists to detail out to the external application and view the occurrence that has been linked to the Customer Service Record.

**Information Form**
If Information Form is checked on, then for the "relationship" the ability exists to obtain a description for the occurrence that has been linked to the Customer Service Record. Some examples are a formatted Name, a formatted Property Address etc.

**Update Form**
If this is checked on then it indicates that the external application entity contains data in its own system that belongs to Customer Service. If the data changes in Customer Service then the external application will be called to update any data that it holds.

**Single Link For Local Entity**
If this is checked on then this indicates that for the entity that is listed under "Local Entity", the Customer Service entity, there can only be one link to the Customer Service occurrence.

For example, we may only want to allow one Name to be linked against a Customer Service occurrence for this type of relationship.

**Single Link For Application Entity**
If this is checked on then this indicates that for the entity that is listed under "Application Entity", the External Application entity, there can only be one link to an external application occurrence.

For example, we may only want to allow a Name to be linked against a Customer Service occurrence only once for this type of relationship.

**Active**
Indicates whether the Role Type is active.

For User Defined Role Types, the ‘Active’ flag is always set ‘On’, as User Defined Role Types are not able to be made inactive.

# Merge Type Parameters

The Merge Type Parameters are used to define specific letters or documents that will be required for use within the Customer Service Module. Any types of letters or standard documents may be created, using the Word Processing package associated with the Pathway Product.

The actual creation of these Merge Types is detailed in the Word Processing Manual.

# Extract Type Parameters

The Extract Type Parameters are used to define specific letters or documents that will be required for use within the Customer Service Module. Extract Types allow for specific fields to be extracted from the specific Customer Service Request and be assigned to a Merge Type and creating a template, using the Word Processing package associated with the Pathway Product.

The actual creation of these Extract Types is detailed in the Word Processing Manual.

The following Extract Field Lists are available for use in documents within the Customer Service Module:

ANIMALS - Animals against Customer Requests

| | |
|---|---|
| Animal Reference | «Animal_Reference» |
| Animal Name | «Animal_Name» |
| Animal Type Code | «Animal_Type_Code» |
| Animal Type Description | «Animal_Type_Description» |
| Animal Breed Code | «Animal_Breed_Code» |
| Animal Breed Description | «Animal_Breed_Description» |
| Animal Colour Code | «Animal_Colour_Code» |
| Animal Colour Description | «Animal_Colour_Description» |
| Animal Gender | «Animal_Gender» |
| Formatted Name | «Formatted_Name» |
| Formatted Address | «Formatted_Address» |

APPL - Applications against Customer Requests

| | |
|---|---|
| Application Number | «Application_Number» |
| Application Description | «Application_Description» |
| Application Type Code | «Application_Type_Code» |
| Application Type Descr | «Application_Type_Descr» |
| Formatted Address | «Formatted_Address» |

INFRINGE - Infringements relating to a Request

| | |
|---|---|
| Infringement Type Code | «Infringement_Type_Code» |
| Infringement Type Descr | «Infringement_Type_Descr» |
| Offence Type Code | «Offence_Type_Code» |
| Offence Type Descr | «Offence_Type_Descr» |
| Formatted Ticket Number | «Formatted_Ticket_Number» |
| Offence Date | «Offence_Date» |
| Ticket Balance | «Ticket_Balance» |

LICENCE - Licensing on a Customer Request

| | |
|---|---|
| Licence Number | «Licence_Number» |
| Formatted Address | «Formatted_Address» |
| Licence Description | «Licence_Description» |
| Licence Type Code | «Licence_Type_Code» |
| Licence Type Description | «Licence_Type_Description» |

NAMES - Name List

| | |
|---|---|
| Mailing Address | «Mailing_Address» |
| Name | «Name» |

NOTES - Request Notes

| | |
|---|---|
| Officer Code | «Officer_Code» |
| Officer Descr | «Officer_Descr» |
| Date and Time | «Date_and_Time» |
| Note Type | «Note_Type» |
| Note Type Descr | «Note_Type_Descr» |
| Security Level | «Security_Level» |
| Note | «Note» |

PROPERTY - Properties attached to a Request

| | |
|---|---|
| Owner | «Owner» |
| Address | «Address» |
| Address Single Line | «Address_Single_Line» |
| Property Key | «Property_Key» |

TASKS

Within the Customer Service >> Parameters >> Extract Type Parameters menu item, a 'Request Tasks' extract list type with code 'TASKS' is now available. The TASKS list contains the following fields, listed with their sources:

| Field | Source |
|---|---|
| Task_Type_Code | Customer Service >> Parameters >> Workflow >> Task Type Maintenance >> Task Type |
| Task_Type_Description | Customer Service >> Parameters >> Workflow >> Task Type Maintenance >> Task Type Description |
| Task_Status | Customer Service >> Request Maintenance >> Task Maintenance >> Task Status |
| Start_Date | Customer Service >> Request Maintenance >> Task Maintenance >> Actual Start Date |
| Completion_Date | Customer Service >> Request Maintenance >> Task Maintenance >> Actual Completion Date |

The list of task details returned can be restricted by selecting the *Additional Filter* button in Extract Type Maintenance and by specifying values on the Tasks Extract List Filter form. A select/remove control on this form allows task types to be assigned so that the returned list only contains tasks with those types. If no task types are assigned, tasks of all types are returned. There is also a *Task Status* filter field available. The possible values generally correspond with the status values displayed on the Task Maintenance form, with the following exceptions:

| Value | Meaning |
|---|---|
| All | The list of task details is not restricted by status. |
| Incomplete | Only tasks with no Actual Completion Date value are included. |

The following Associated Extracts (created within the Property Module) are available to Customer Service and may be added as Associated Extracts to the PROPERTY Extract.

SERVICES – Property Services

| | |
|---|---|
| Service Code | «Service_Code» |
| Service Description | «Service_Description» |
| Service Sub Type Code | «Service_Sub_Type_Code» |
| Service Sub Type | «Service_Sub_Type_Descr» |

| | |
|---|---|
| Descr | |
| Service Frequency Code | «Service_Frequency_Code» |
| Service Frequency Descr | «Service_Frequency_Descr» |
| Collection Day | «Collection_Day» |
| Collection Time | «Collection_Time» |
| Service Area Code | «Service_Area_Code» |
| Service Area Descr | «Service_Area_Descr» |
| Service Reference | «Service_Reference» |
| Service Collection Sequ | «Service_Collection_Sequ» |
| Service Date Requested | «Service_Date_Requested» |
| Service Date Installed | «Service_Date_Installed» |
| Service Installed Ref | «Service_Installed_Ref» |
| Service Date Removed | «Service_Date_Removed» |
| Service Removed Ref | «Service_Removed_Ref» |
| Service Removed Code | «Service_Removed_Code» |
| Service Removed Descr | «Service_Removed_Descr» |
| Service Date Missing | «Service_Date_Missing» |
| Service Number Services | «Service_Number_Services» |
| Service Comments | «Service_Comments» |
| Service Status | «Service_Status» |
| Delivery Instruction 1 | «Delivery_Instruction_1» |
| Delivery Instruction 2 | «Delivery_Instruction_2» |
| Delivery Instruction 3 | «Delivery_Instruction_3» |
| Delivery Instruction 4 | «Delivery_Instruction_4» |

REFERENC – Property References

| | |
|---|---|
| Reference Type | «Reference_Type» |
| Reference Description | «Reference_Description» |
| Reference Number | «Reference_Number» |
| Status | «Status» |
| Status Date | «Status_Date» |

QUESANSW - Questions and Answers

| | |
|---|---|
| Question Number | «Question_Number» |
| Question Text | «Question_Text» |
| Answer Text | «Answer_Text» |

RATES - Rates Assessment attached to a Customer Request

| | |
|---|---|
| Formatted Address | «Formatted_Address» |
| Assessment Number | «Assessment_Number» |
| Check Digit | «Check_Digit» |

REFERENC - Reference Extract List

| | |
|---|---|
| Reference Type | «Reference_Type» |
| Reference Description | «Reference_Description» |
| Reference Number | «Reference_Number» |
| Status | «Status» |
| Status Date | «Status_Date» |

STRTSUBR - Street Suburb linked to a Customer Request

| | |
|---|---|
| Street | «Street» |

| | |
|---|---|
| Suburb | «Suburb» |
| State | «State» |
| Postcode | «Postcode» |

WARD – Ward Against Customer Requests

| | |
|---|---|
| Ward | «Ward» |

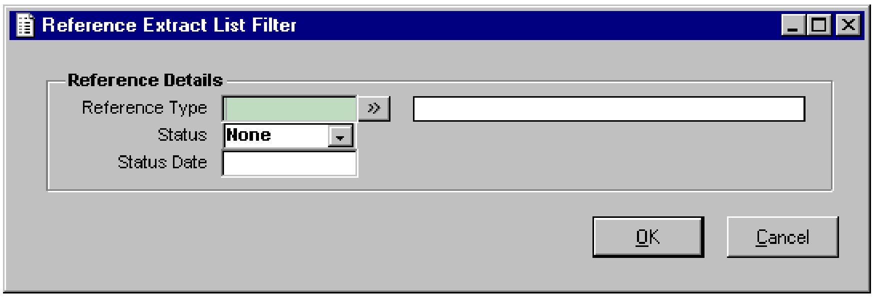
**Module Link fields via Registers**

When a Register is defined with a Customer Service link, an Extract List definition will be created automatically within the Customer Service module. This Extract List may then be used to create an Extract Type and Template document, which in turn may be included on a Merge Type document.

The automatically generated Extract Lists will be available for selection from the usual Extract Lists Popup. The "Extract Code" will consist of the constant 'CRG_' suffixed with a unique number. The "Description" will consist of the constant 'Register -' suffixed with the first 39 characters of the Register Description. (Example: CRG_66 Register - Music Collection Register)

When defining an Extract Type Template document based on one of these Register Extract Lists, the list of Merge Fields available will include three fixed fields providing information about the Register itself and the related Register Reference number, along with all other data fields as defined on the Register, all of which may be included as necessary on the document. When printed, the details of all Register Entries to which the current Customer Service Request is related will be extracted.

## Reference Extract List Filter Form




*Reference Extract List Filter Form*

### Reference Type

Enter a Reference Type in this field, or alternatively you may select one from the Pop Up.

### Status

This field contains the status of the Reference Type. Four status options are available from the drop-down list. The status will default to None upon entry to the form.

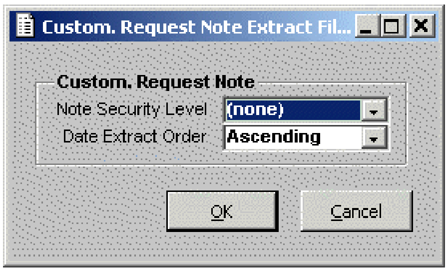
- None
- Current
- Historic
- Proposed

### Status Date

This field allows the user to specify a date on which the Status on the Reference Type changed. Reference Types may be filtered on this date.

## Request Note Extract Filter Form

This form allows users to select a specific Note Security Level and the order in which the Notes are extracted. If a Security Level is not specified (none) then all Notes will be extracted.



*Request Note Extract Filter Form*

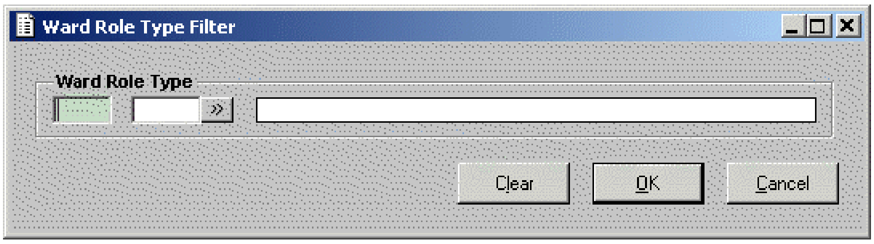
**Note Security Level**
This field allows selection of a Note Security Level on which to filter the Request Notes extraction. The available choices are:

- (none)
- General
- Restricted
- Confidential

If the default Security Level of (none) is selected then all Note Types will be included in the extraction. If one of the other Security Levels is selected, then the Notes extracted should only be for the Security Level that was selected on this form.

**Date Extract Order**
This option allows the user to nominate the date order in which the notes should be printed (ascending or descending). The default order is ascending.

## Ward Role Type Filter Form



*Ward Role Type Filter Form*

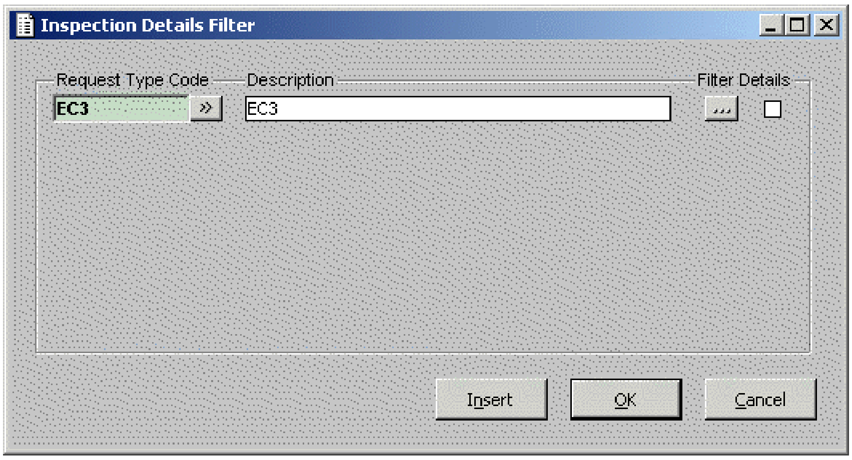
**Ward Role Type**

This field allows a Ward Role Type to be entered or selected from the Pop Up upon which the Extract Type will be filtered.

## Inspection Details Filter Form

The Inspection Details Filter form allows for the specification of Inspection Filter information by Request Type. The filter details apply at the Request Type level because all Inspection Parameters are stored by Request Type. However, because the Extract Type definition occurs from the Parameter Maintenance Menu and not from Request Type Maintenance, it is necessary to make a Request Type selection first.

Therefore, in order to have any selection filtering or sort ordering applied on the Inspections for Requests, it is necessary to enter any filter details for each Request Type where required. If no filter details exist for any Request Type, then all Inspections on Requests for that Request Type will be printed.




*Inspection Details Filter Form*

### Request Type Code/Description

Key in a Request Type Code or alternatively, you may select one from the Pop Up. The Description field will be automatically populated with the Request Type Description.

### Filter Details

Selecting the Filter Details button will display the Extract Filter form. This form allows the specification of several filtering parameters as well as the definition of a sort order for the Inspections.

# User Defined Labels

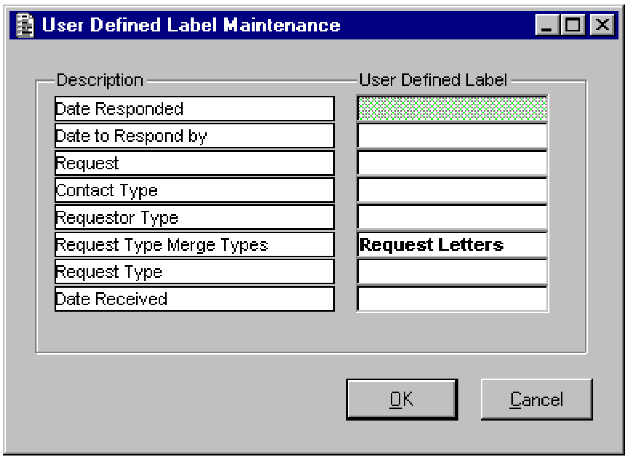
This parameter allows the setting up of User Defined Labels fields which allow the user to replace the existing standard fields with specific Labels of their own.

## User Defined Label Maintenance Form

The User Defined Labels fields allow the user to replace the existing standard field descriptions with a specific description of their own. The descriptions given may more accurately reflect local terminology.

Only the fields listed may be changed. No other fields or form names are user definable.

When a label is changed the new description given will be displayed throughout the customer service module. It should be noted however that all help text will still refer to the Infor issued field names.




*User Defined Label Maintenance Form*

The fields that can be modified are:

- Date Responded
- Date to Respond By
- Request
- Contact Type
- Requestor Type
- Request Type Merge Types
- Request Types

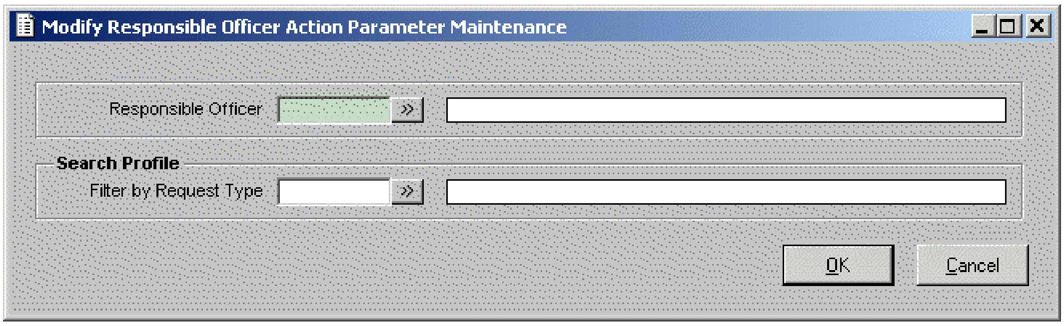
**Description**
This field contains the Infor defined label description.

**User Defined Label**
Entering a value in this field will override the standard field name with that given.

# User Action Parameters

## Modify Responsible Officer Action Parameter Maintenance Form

This form allows a Userid to be entered to be attached to the MAINTRESPO User Action.




*Modify Responsible Officer Action Parameter Maintenance Form*

### Responsible Officer

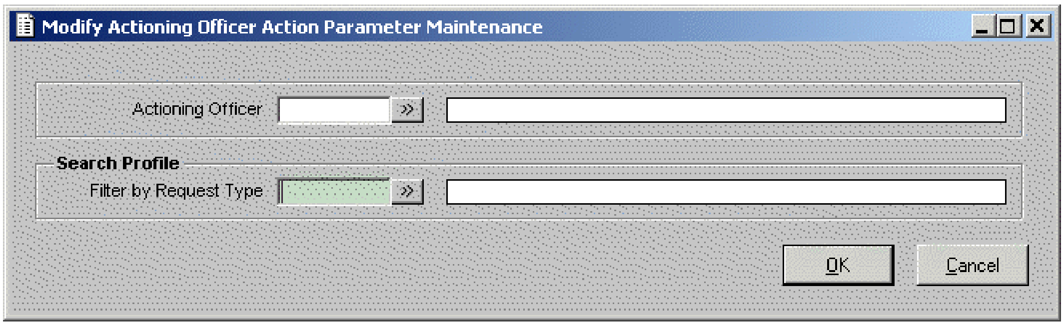
Enter the Userid you wish to attach as the Responsible Officer to the MAINTRESPO User Action or alternatively, you may select one from the Pop Up.

### Search Profile – Filter by Request Type

These fields allow a Request Type to be entered or selected from the Pop Up to filter the display of Responsible Officers. If no search profile is entered then all Responsible Officers will display.

## Modify Actioning Officer Action Parameter Maintenance Form

This form allows a Userid to be entered to be attached to the MAINTOFICR User Action.




1*Modify Actioning Officer Action Parameter Maintenance Form*

### Actioning Officer

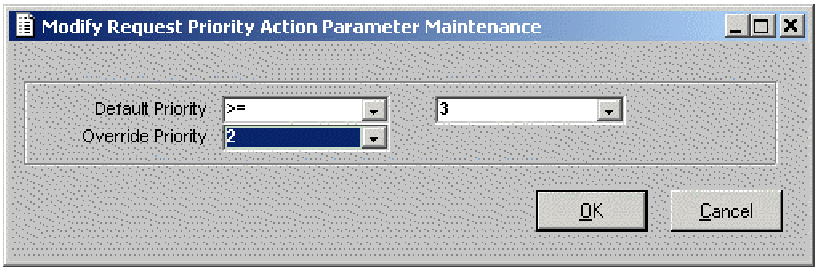
Enter the Userid you wish to attach as the Actioning Officer to the MAINTOFICR User Action or alternatively, you may select one from the Pop Up.

### Search Profile – Filter by Request Type

These fields allow a Request Type to be entered or selected from the Pop Up to filter the display of Actioning Officers. If no search profile is entered then all Actioning Officers will display.

## Modify Request Priority Action Parameter Maintenance Form

This form allows a default and an override Priority to be established to determine if the Priority of a Customer Request will be modified by the PRIORITY System Action. If there are no default and override priority settings on this form (i.e. all settings are 'none'), a form with a Priority dropdown list will display to allow the user to select an override priority with which to update the Request.




*Modify Request Priority Action Parameter Maintenance Form*

**Default Priority**

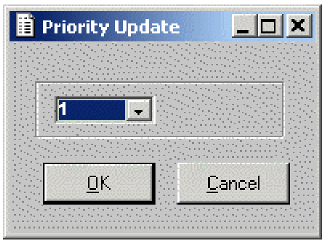
These fields allow a priority level to be selected from the dropdowns (e.g. >= 3) to establish parameters for modifying the Priority level of a Request.

**Override Priority**

This field allows an override Priority to be selected from the dropdown

## Priority Update Form

This form allows the user to set an overriding Priority with which to update a Customer Request.



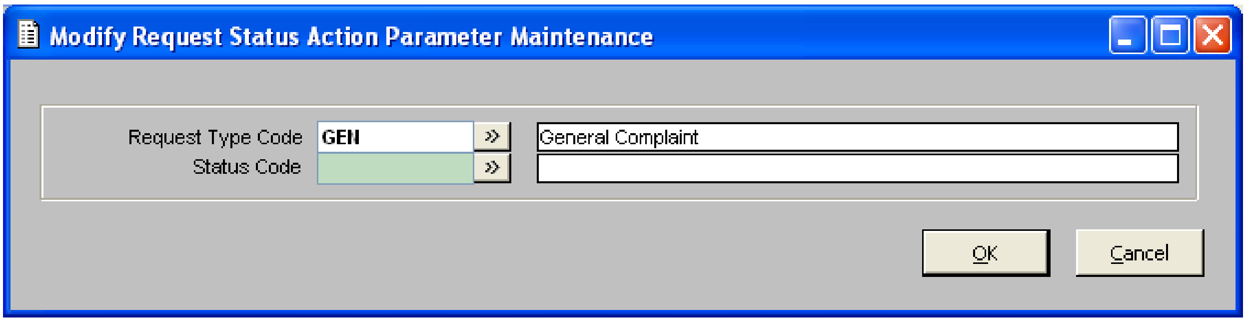

*Priority Update Form*

**Priority**

This field allows the user to select from a dropdown list an overriding Priority with which to update the Customer Request.

## Modify Request Status Action Parameter Maintenance Form

This form allows a Request Status to be entered to be attached to the STATUS User Action.




*Modify Request Status Action Parameter Maintenance Form*

**Request Type Code**
The Request Type Code fields allow entry of a Request Type when the Action Parameters are maintained for a User Action with System Action = STATUS.

Note: These fields are only available if the authorised function 'Status Codes at Request Type Level' is authorised. For those sites not authorised, the existing functionality remains unchanged (i.e. the Request Type Code fields will not display).

These fields are used in 2 ways:

1. If a Request Type is nominated
   - If one or more Status Codes have been assigned to the Request Type, then only those Status Codes that have been assigned to the Request Type will be valid and will display in the Pop Up form.
   - (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes with 'Completed' set to 'No' will be valid/displayed in the Pop Up form)

   If a Request Type is not nominated.
   - Existing functionality will apply i.e. all Status Codes will be valid / displayed in the Pop Up form)

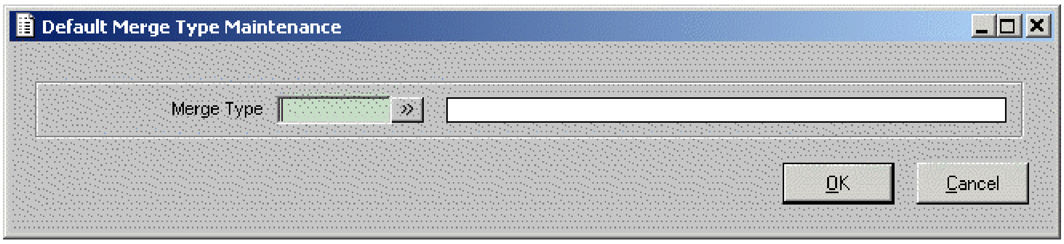
2. It will be used to limit the execution of the Action when it is performed for a Request.
   - If a Request Type is nominated for the User Action, then the Status change will only be applied to Requests with the nominated Request Type (See the Work Flow Task section for further details)

**Status Code**
Enter the Status Code you wish to attach to the STATUS User Action or alternatively, you may select one from the Pop Up.

If the authorised function 'Status Codes at Request Type Level' is active and a Request Type Code has been selected which has Status Codes assigned, then only the assigned Status Codes will display in the Pop Up. Otherwise ALL Status Codes will display for selection.

## Default Merge Type Maintenance Form

This form allows a Default Merge Type to be set up to be used when the 'Document' or 'Letter' System Actions are run.




*Default Merge Type Maintenance Form*

**Merge Type**

These fields allow the selection of a Merge Type which will be used as the default Merge Type when the DOCUMENT or LETTER System Actions are run.

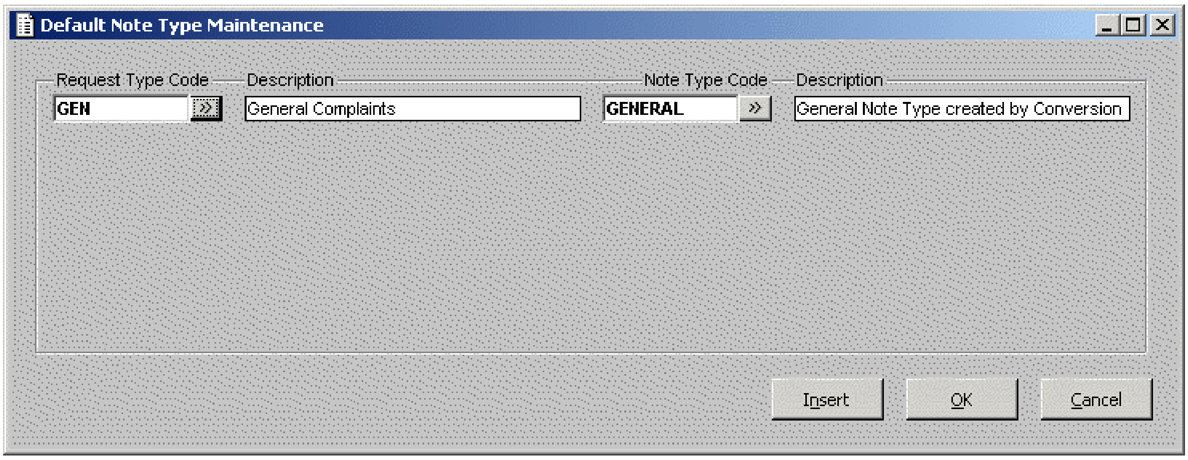
## Default Note Type Maintenance Form

This form allows the definition of 'Default' Note Types to be used when running Workflow Tasks for User Actions that are based upon the Customer Service System Action of 'NEWNOTE'.
When starting such a Task the Note Entry form will initially be populated with the Note details from the selected default Note Type.

The User Action Note Type parameters may be specified for both Parent and Child Request Types. Multiple Request Types may be specified and a Note Type chosen for each.

The Default Note Type Maintenance form has been created to allow the definition of these Request Type/Note Type defaults and is available from the Menu Option: Customer Service >> Parameters >> Work Flow Parameter Interface, via the User Action option button.

When creating or maintaining any User Action that is based on the System Action of 'NEWNOTE', the "Action Parameters" option button will be available. Selecting the Action Parameters option button will display a form where you may specify Request Types and the Note Types to be used as their defaults for Tasks based on this User Action.




*Default Note Type Maintenance form*

**Request Type Code/Description**

Enter a Request Type or select one from the Pop Up. The Description field will subsequently be filled in along with the Default Note Type of the associated Parent Request Type. This is only an initial value and may be overridden.

**Note Type Code/Description**

Initially the Note Type field and Description are filled with the Default Note Type of the associated Parent Request Type. These fields may, however, be overridden. The Note Type Pop Up may be used to select an alternative Note Type for the selected Request Type.

# Policy and Procedure Documents

The ability to find and retrieve documents instantaneously means employees can also respond quickly to customer questions and enquiries. This instant access to information can eliminate the time delays that frustrate customers, eliminate confusion and misinformation, and ultimately translate into more satisfied customers.

From within the Customer Service Request Maintenance/Enquiry function users will get access to Policy Documents at any time by using a pull down Menu. The Policy and Procedure Document Enquiry form will then permit the user to search for and view, or email, selected documents.

With the Pathway Policy & Procedure Documents option…

**Documents can be….**
- Grouped for easy locating
- Linked to a Customer Request
- Restricted from view if necessary
- Stored in 3 different formats
- External Windows documents (e.g. http:\\www.geac.com.au; Q:\docs\ACR\Opening Times.doc)
- Internal system WP documents
- Internal System Notes

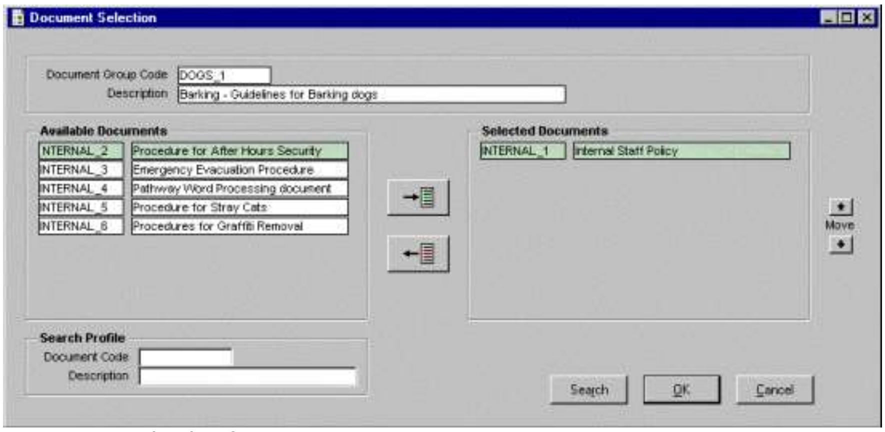
**Users can…..**
- Easily navigate the hierarchy of related documents
- View documents
- Email documents to customers or internally
- Link documents to a Customer Request
- Link documents used in the resolution of a customer request
- Change the stored file path of documents
- View the same documents simultaneously from their PCs

**Setup (Parameter Level)**
Users will be required to create Document Groups as well as Documents. Documents can be assigned to Document Groups, and these Groups can in turn have Groups assigned to them, thereby creating a hierarchy of Document Groups.
Documents can be created as Word documents, Internet/Intranet pages, Excel spreadsheets, Internal Pathway WP documents, or Internal System Notes.

From the Document Group Maintenance form the user can set up Document Groups, which can be associated to a Parent Group.

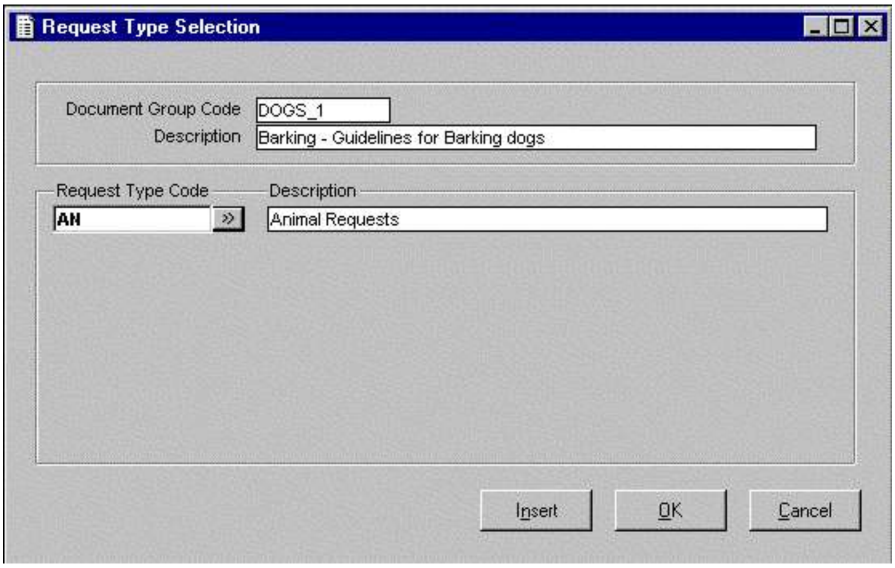
*Document Group Maintenance form*

Each Document Group can have Documents associated to it.



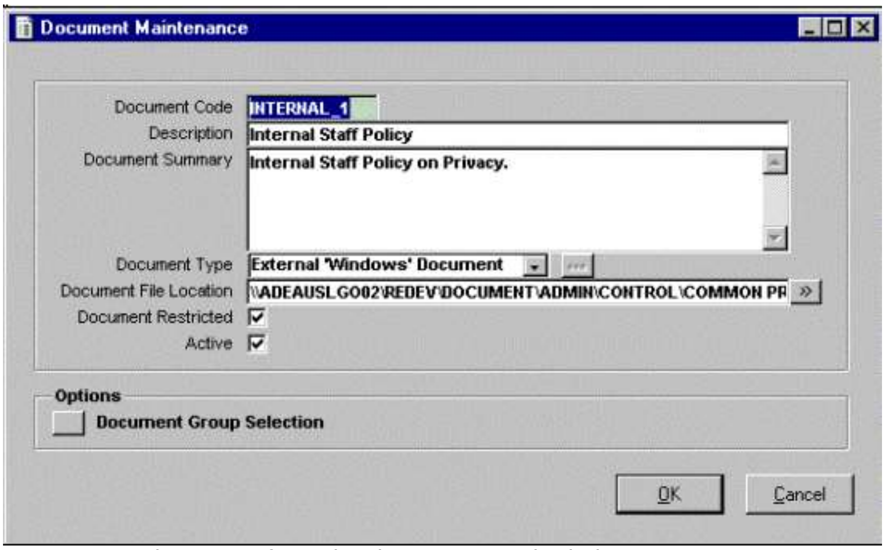

*Document Selection form*

Each Document Group can also be linked to Customer Service Request Types.



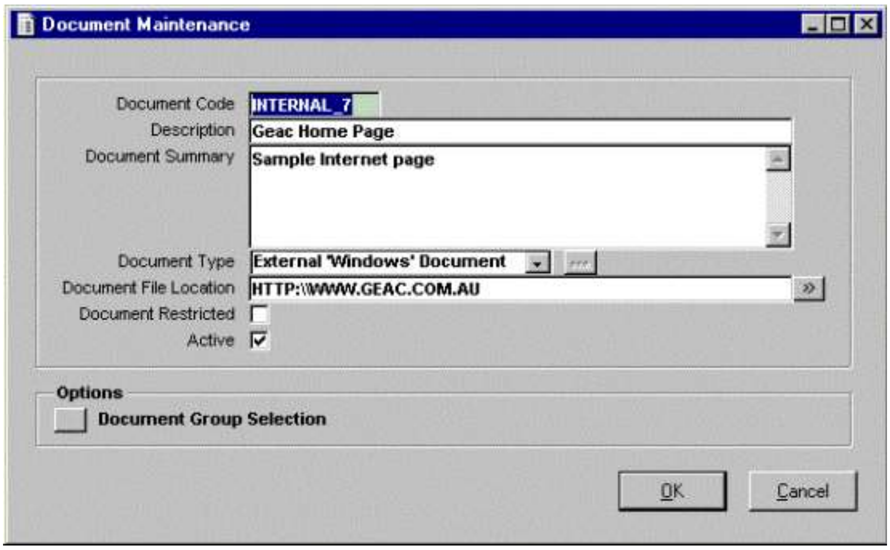

*Request Type Selection form used to link Request Types to Documents*

Documents can be created as External Windows documents with a local path or network path file name, e.g.



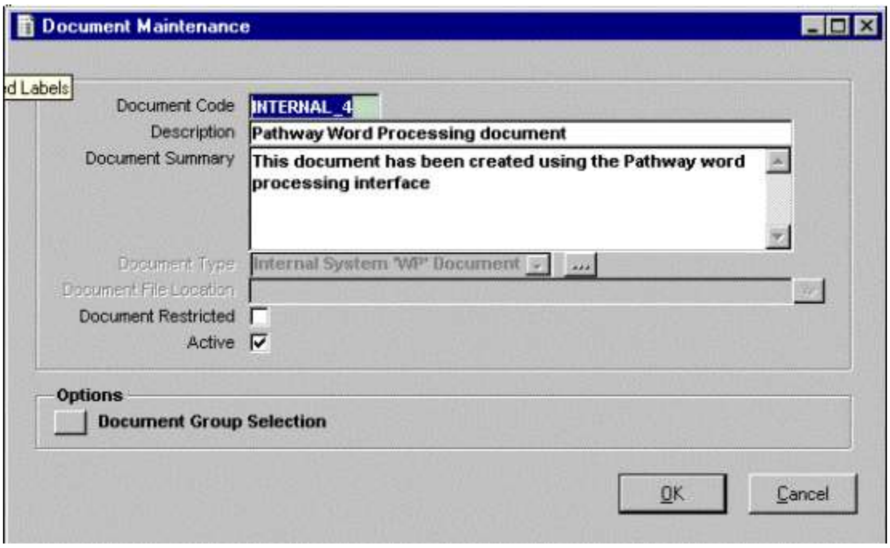

*Document Maintenance form showing an External Windows Document Type stored on the network*

Or Internet/Intranet page addresses, e.g.



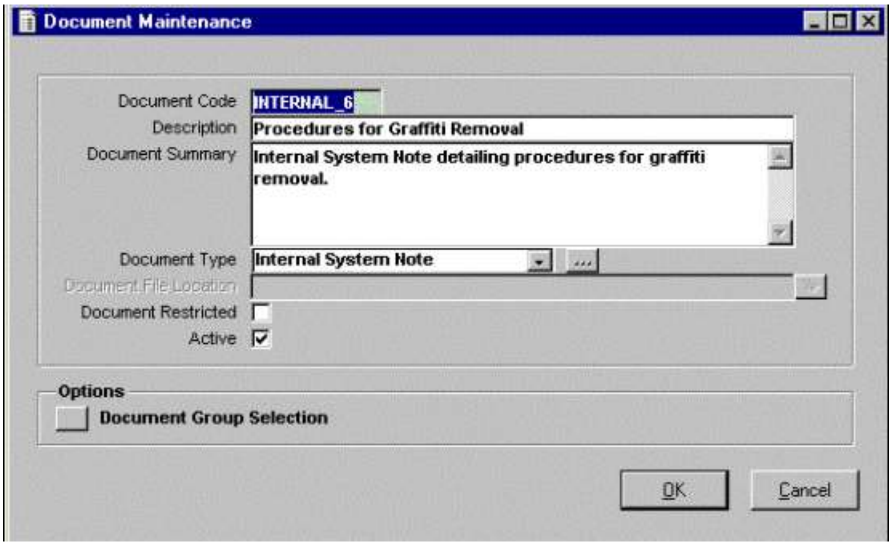

*Document Maintenance form showing an Internet address*

Documents can be Internal Pathway WP Documents, e.g.




*Document Maintenance form showing an Internal System WP Document*

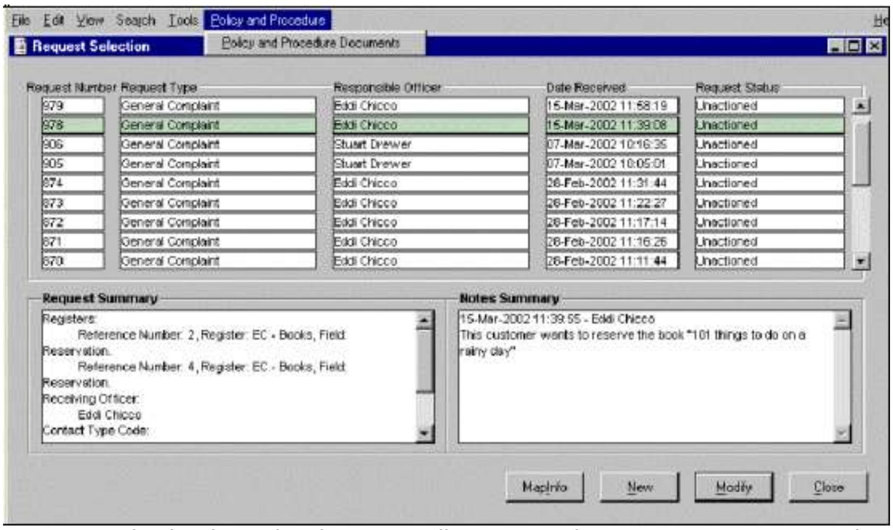
Documents can also be created as Internal System Notes, e.g.



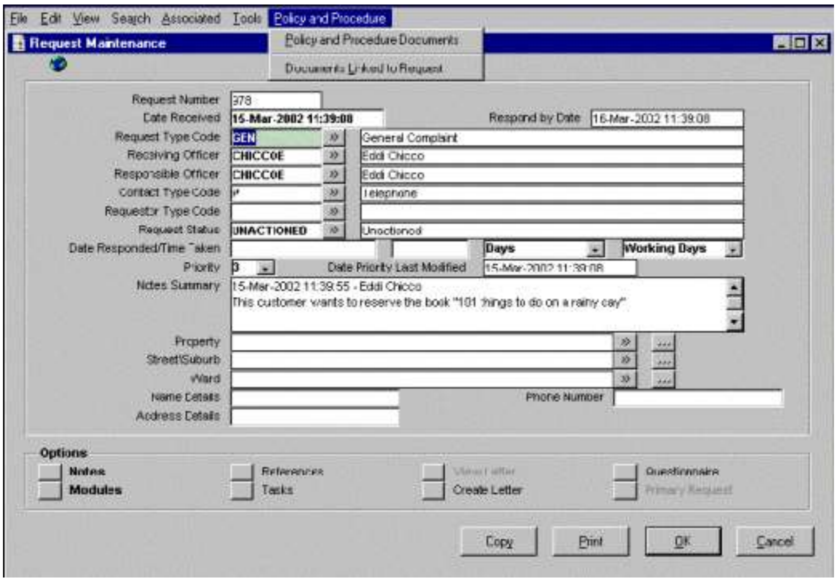

*Document Maintenance form showing an Internal System Note*

**Search Profile and Selection Forms**

From within the Customer Service Request Maintenance/Enquiry function users will be able to get access to Policy Documents at any time by using a pull down Menu. The Policy and Procedure Documents form will then permit the user to search for and view, or email, selected Documents.

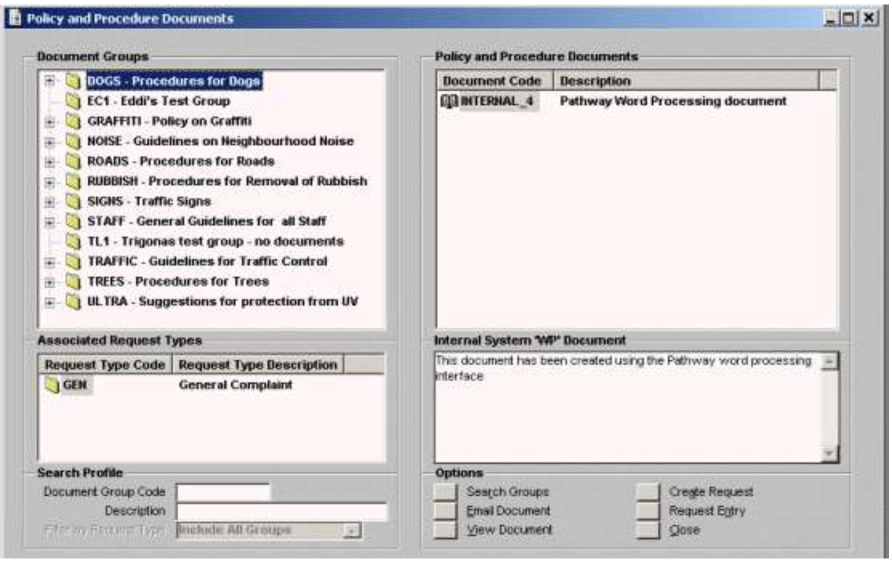



*Request Selection form showing new Policy & Procedure Documents Menu Option*



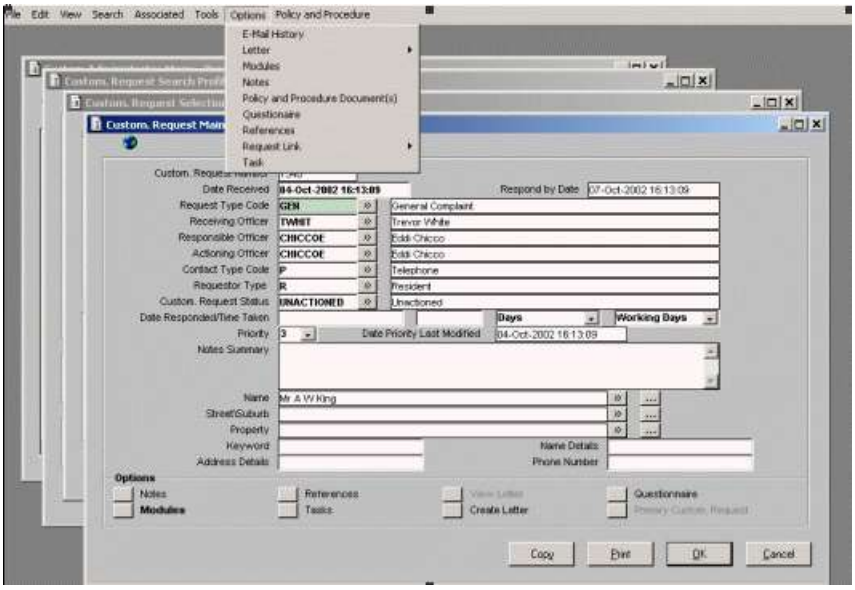

*Request Maintenance form showing new Policy & Procedure Documents Menu Option*

By selecting the Policy & Procedure documents option from the menu users will be able to View or email *all* Documents, or those linked to the Request Type. Users will also be able to create a new Request from this form.

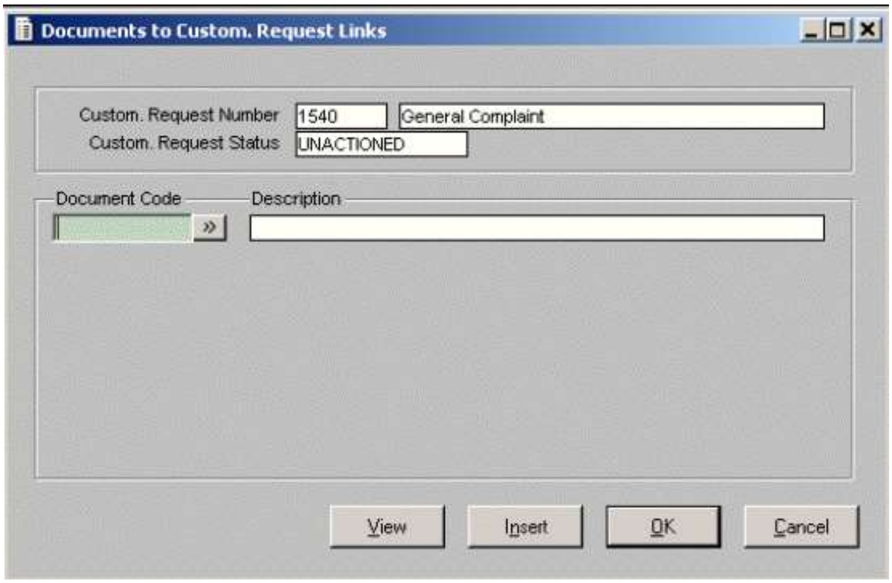


*Policy and Procedure Documents form*

It is also possible to link Documents that have been used in the resolution of a Customer Service Request to the Request for future reference.

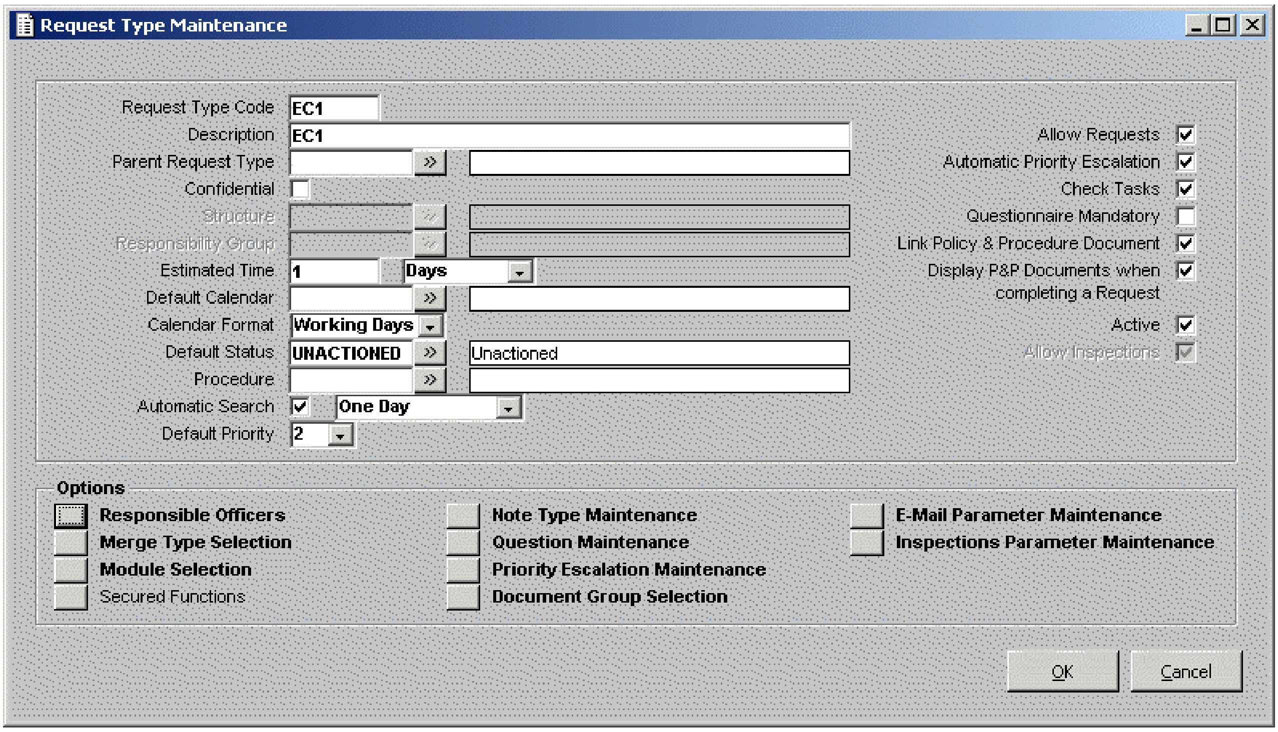


*Request Maintenance form showing new P&P Document(s) menu option (on the Options menu)*



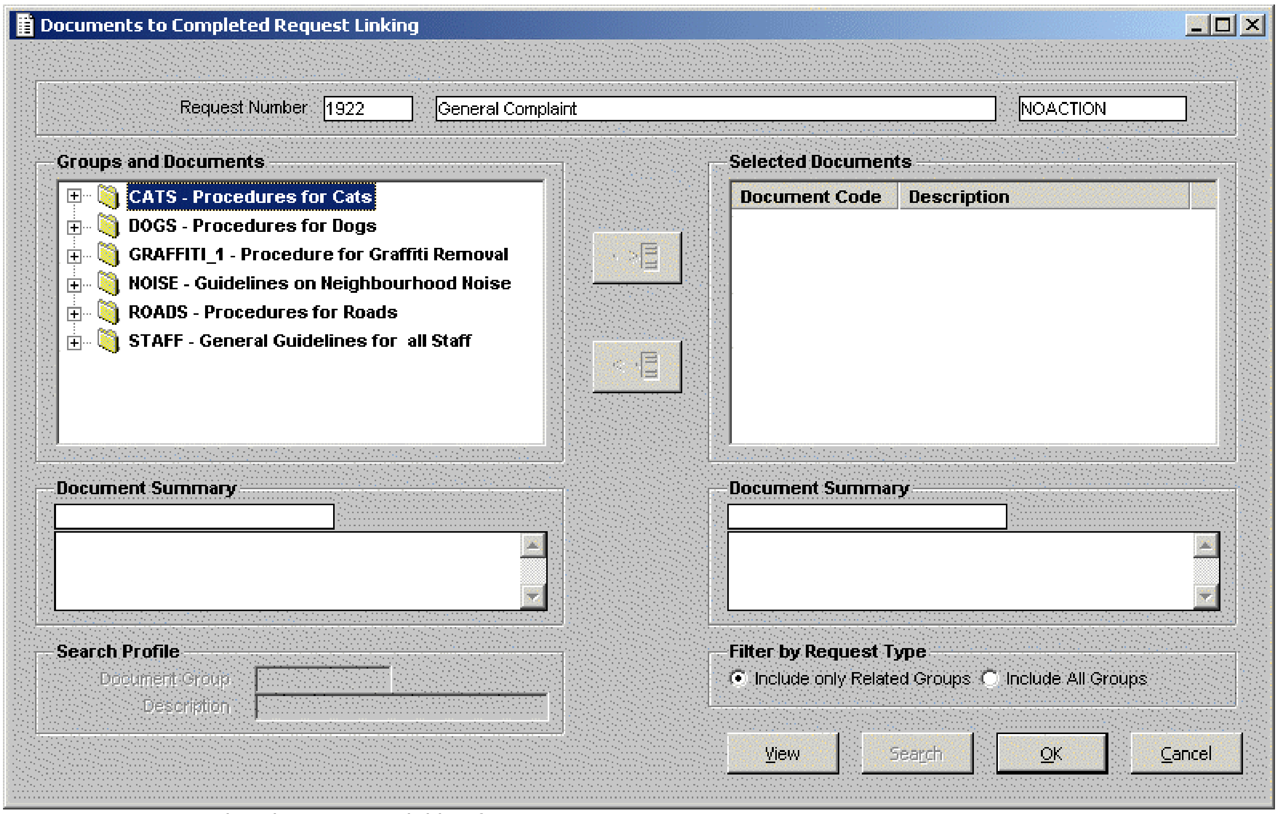

*Documents to Request Links form which allows documents to be linked to a Request*

A flag has been added to the Request Type Maintenance form to tell Request Maintenance that when completing a Request the user is to be given the opportunity (automatically) to link Policy and Procedure Documents to the Request. This will only occur when the Request Status is changed to a completion Status and OK is pressed and when no documents have already been linked to the Request.




*New flag to display P&P documents on Request completion (Link Policy & Procedure Documents)*

The following form will display to allow users the opportunity to link Documents to the Request before finalising it.

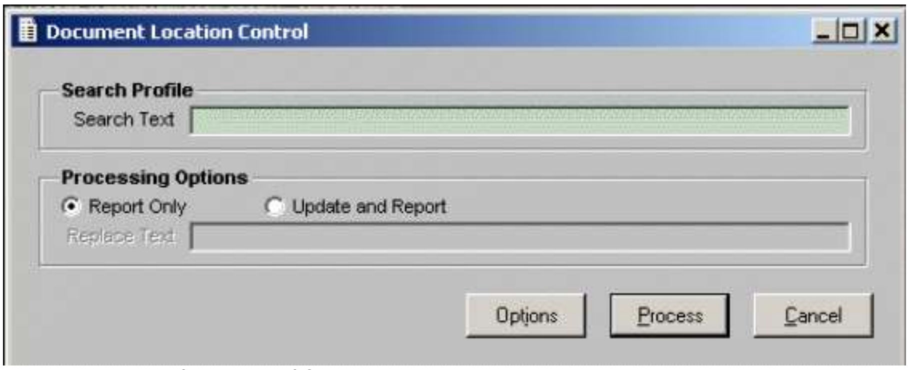


*Documents to Completed Requests Linking form*

**NOTE**: When using the Policy and Procedure feature to view a Document defined as an 'External Windows Document', the actual view is performed by the Windows Operating System based upon the Associated File Type. This will cause the application program associated with the file type to start, and to display the selected Document. It is important to note that this operation is separate from the Pathway Session from which the view was initiated. As such Pathway has no control over the running of the associated program and it is up to the user to navigate their way 'back' to the Pathway Session. The ALT-Tab key sequence can be used to facilitate this. Additionally, if multiple Documents of the same type are viewed, it is possible that the user will have multiple instances of the same associated application program opened. This is dependent on the functionality of the associated program. Once again Pathway has no control over this behaviour and it will be the user's responsibility to 'Close' the viewing application programs as necessary.

**Policy & Procedure Document Location Maintenance**

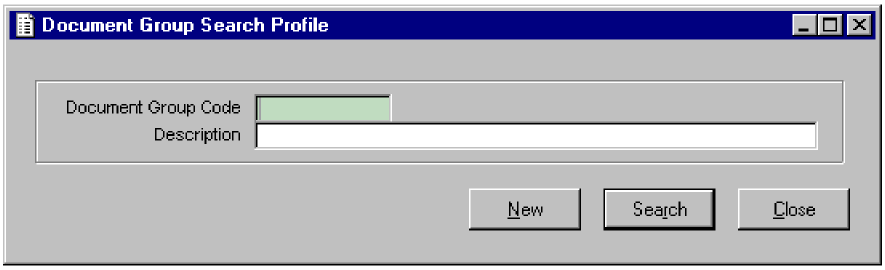
A batch option has also been provided for updating the stored 'File Path' data for external documents. This is particularly useful if users rearrange their server directory structures, thereby invalidating the file paths stored in Customer Service. The function provides a 'Report Only' and 'Report and Update' facility. The user is required to enter a search string (using wildcard characters as necessary) and if the Update option is selected, a replacement string needs also to be specified. The replacement string is then used to overwrite all occurrences of the search string.




*Document Location Control form*

## Document Group Search Profile Form

This form may be used to search for an existing Document Group or create a new group by selecting the 'New' button.



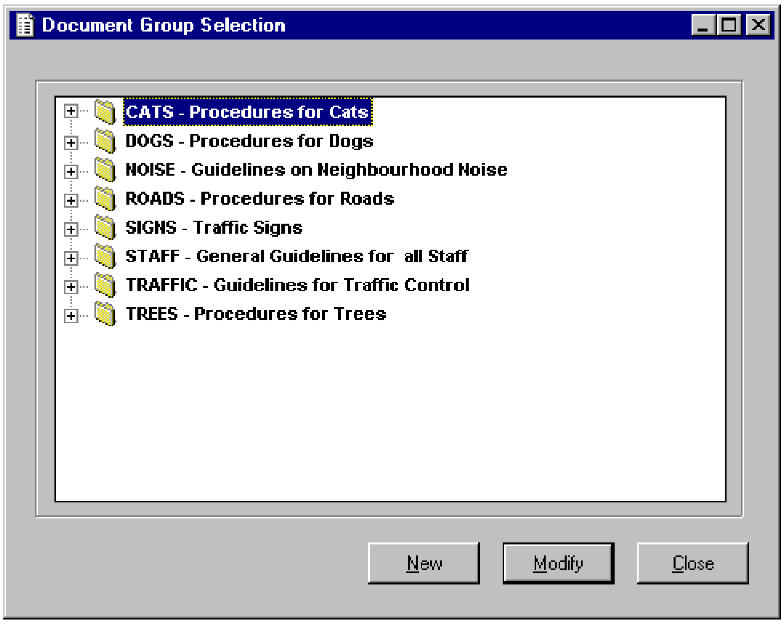

*Document Group Search Profile Form*

**Document Group Code**
Enter an existing Document Group Code on which to search, then select the 'Search' button. A Description may also be entered in combination with a Group Code. Wildcard searching is available in this field.

**Description**
Enter a Group Description in this field on which to search. This field may be used in combination with the Group Code field. Wildcard searching is available in this field.

## Document Group Selection Form

This is a 'tree-style' selection form which allows the user to navigate the hierarchy of related Document Groups. (A hierarchy is created when a Document Group has an existing group defined as its 'Parent Group'. ). Note that whenever a Filter profile is specified, e.g. T*, the Selection form will not display the Groups as a hierarchy. Instead it will display in one level, all the matching groups from all levels.




*Document Group Selection Form*

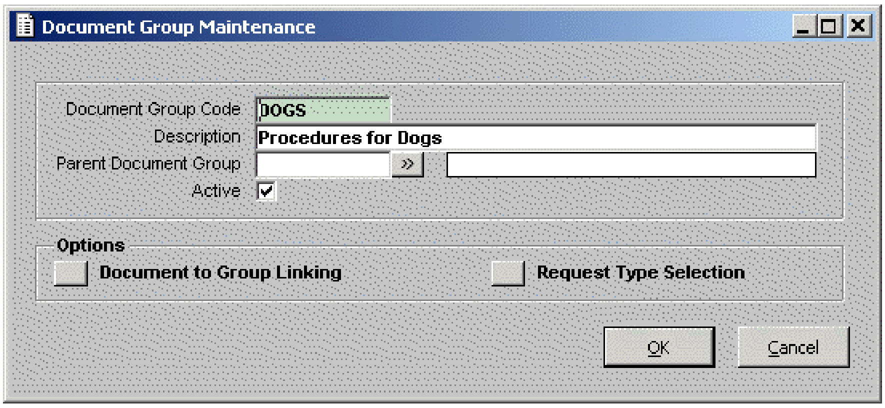
**Document Group Tree**

The Document Groups display in this field as a hierarchical Tree with parent and child groups. The branches of the tree may be expanded and collapsed using the mouse or keyboard arrow buttons. Items can be selected by focusing on the required group and using the 'Modify' button or F2.

## Document Group Maintenance Form

This form allows a Document Group to be created or maintained. It also contains two option buttons to allow the Document Group to be linked to existing Documents, or to be linked to one or more Request Types

.




*Document Group Maintenance Form*

**Document Group Code**

Enter a Document Group Code to identify the Document Group.

**Description**

Enter a Description for the Document Group.

**Parent Document Group**

An existing Document Group may be entered in this field as a 'Parent' Document Group. Alternatively, one may be selected from the Pop Up.

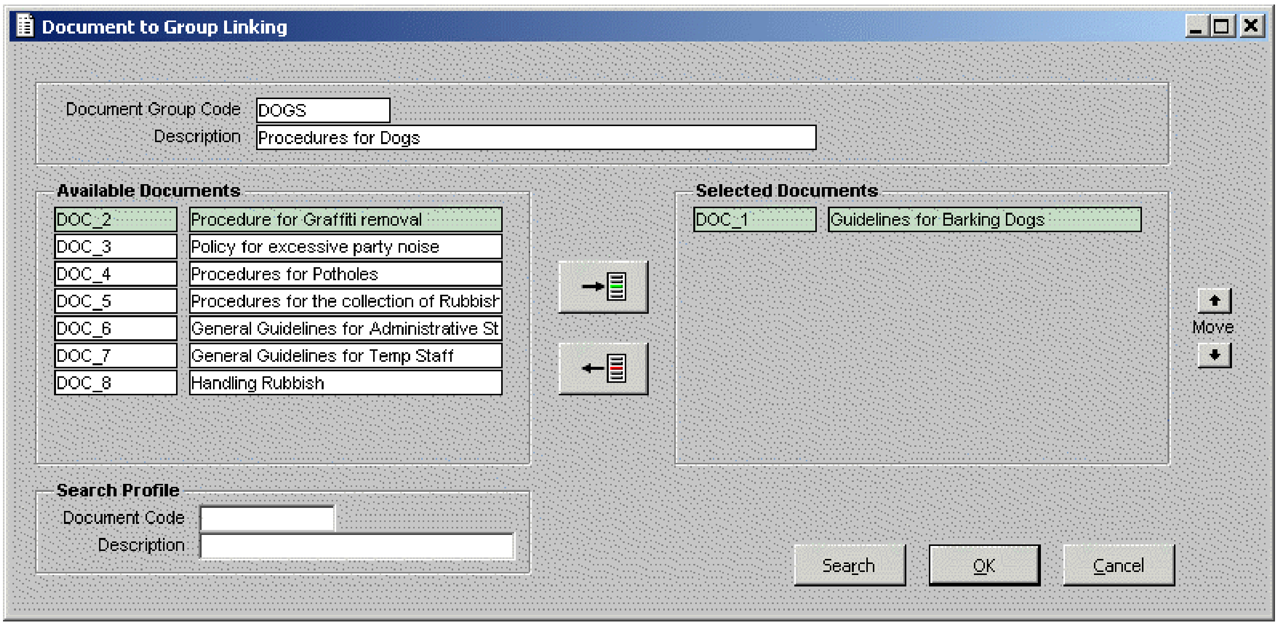
**Active**
Check this flag on to make the Document Group active.

**Options - Document To Group Linking**
Selection of this button displays the Document to Group Linking Form which enables the user to link existing Documents to the Document Group.

**Options - Request Type Selection**
Selection of this button displays the Request Type Selection Form which enables the user to link existing Request Types to the Document Group.

## Document To Group Linking Form

This form allows existing Documents to be linked to a Document Group. Use the Select and Remove buttons to move Documents from the 'Available' side to the 'Selected' side. The 'Move' buttons may be used to reorder the Documents in the 'Selected' list.




*Document to Group Linking Form*

**Document Group Code**
This field displays the Document Group Code selected in the previous form. This field is display only and cannot be maintained.

**Description**
This field displays a description of the selected Document Group.

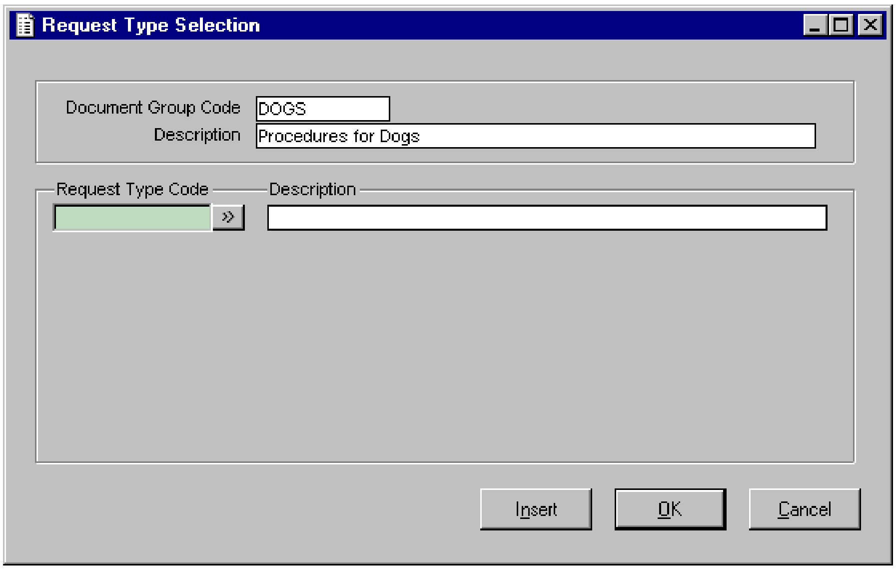
**Available Documents**
These fields display the documents available for selection to be linked to the Document Group. Use the 'Select' or 'Remove' buttons to move documents from one side to the other.

**Selected Documents**
These fields display the documents which have been selected to be linked to the Document Group. Use the 'Select' or 'Remove' buttons to move documents from one side to the other.

**Search Profile - Document Code/Description**
A search profile may be entered in these fields to conduct a search over the available documents. This function is useful when there are a large number of documents available. Wildcard searching is available in these fields.

## Request Type Selection Form

This form allows existing Documents to be linked to a Request Type.  The Insert button may be used to add a blank Request Type field allowing a Request Type to be entered or selected from the Pop Up.




*Request Type Selection Form*

### Document Group Code/Description

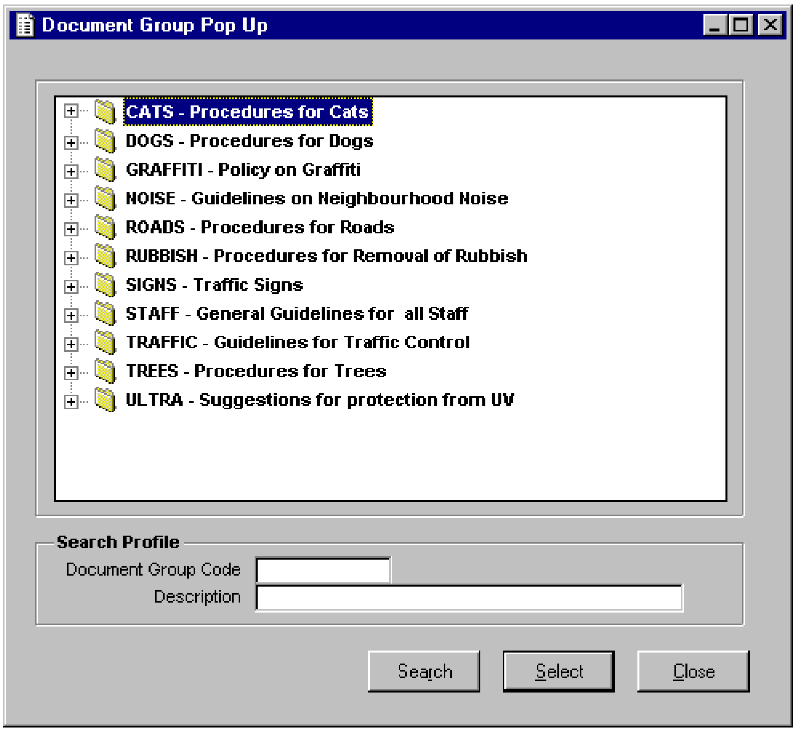
These fields display the Document Group and Description selected in the previous form.  These fields are display only and cannot be maintained.

### Request Type Code

These fields allow a Request Type to be entered or selected from the Pop Up.  To add a new Request Type, select the Insert button.  This will add a blank field with a Pop Up button.  The user may key in a Request Type or alternatively, select one from the Pop Up.  Once the changes are accepted and the form is reaccessed, the Pop Up buttons will no longer be available.

## Document Group Pop Up Form

This form displays the existing Document Groups which are available for selection. This is a 'tree-style' selection form which allows the user to navigate the hierarchy of Document Groups.  Initially, the Groups will display in a hierarchical fashion, however, if a Filter profile is specified, e.g. T*,  the resultant Groups will be displayed at one level.




*Document Group Pop Up Form*

**Document Group Tree**

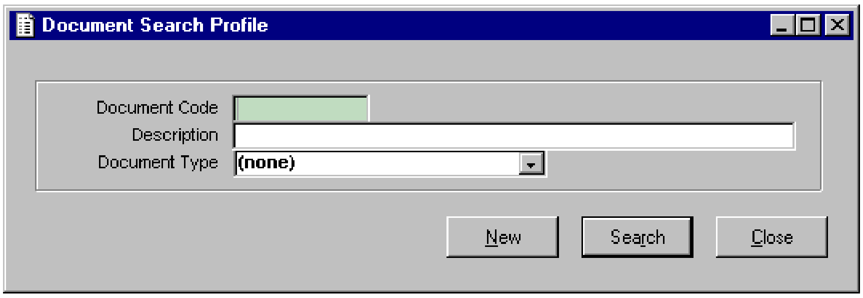
The Document Groups display in this field as a hierarchical Tree with parent and child groups. The branches of the tree may be expanded and collapsed using the mouse or keyboard arrow buttons. Items can be selected by focusing on the required group and using the 'Modify' button or F2. Initially, the Groups will display in a hierarchical fashion, however, if a Filter profile is specified, e.g. T*, the resultant Groups will be displayed at one level.

**Search Profile - Document Group Code/Description**

A search profile may be entered in these fields to conduct a search over the Document Groups. This function is useful when there are a large number of Document Groups available. Wildcard searching is available. Using a filter will result in the retrieved Document Groups displaying at one level (i.e. not in a hierarchy).

## Document Search Profile Form

The Document Search Profile may be used to retrieve specific documents or to create new ones. Enter a search profile and select the Search button, or simply select the New button to add a new document.




*Document Search Profile Form*

**Document Code / Description**

Enter a Document Code and/or Description on which to conduct a search for a document. Wildcard searching is available in this field.

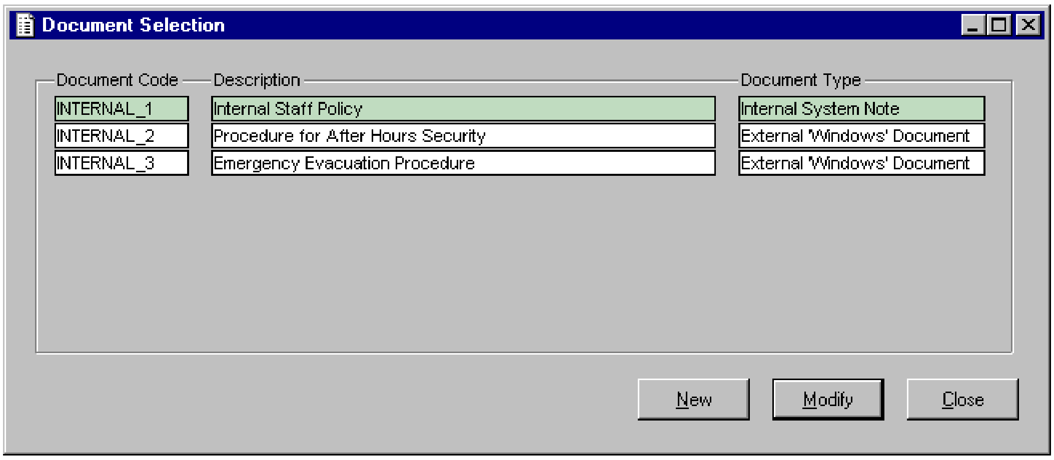
**Document Type**

A Document Type may be selected from the dropdown to be included in the search. The available options are:

- (none)
- External 'Windows' Document
- Internal System Note
- Internal System 'WP' Document

## Document Selection Form

This form displays the documents available for selection. New documents are also able to be created from this form by selecting the 'New' button.




*Document Selection Form*

**Document Code/Description**

These fields display the Document Code and Description of existing documents. These fields are display only and cannot be modified.

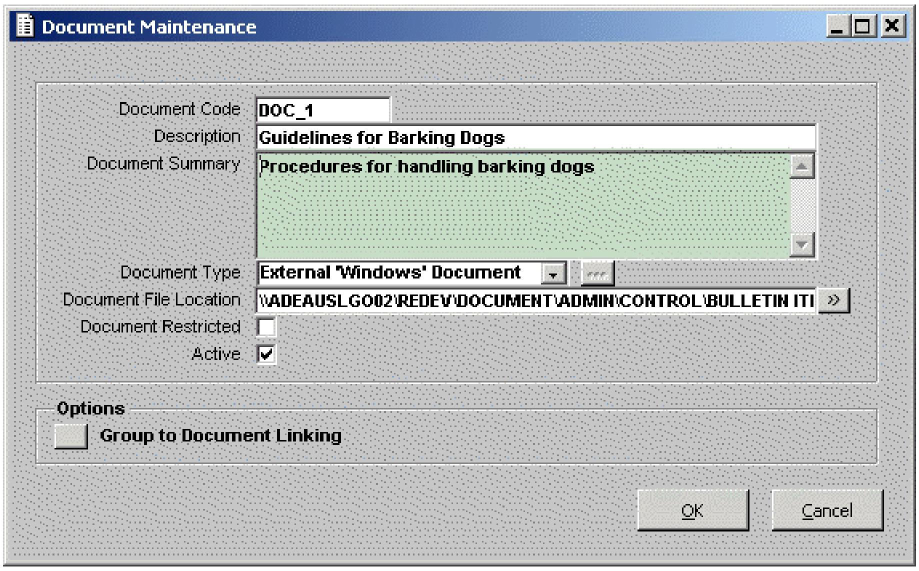
**Document Type**

This field displays the Document Type
e.g.

- External 'Windows' Document
- Internal System Note
- Internal System 'WP' Document

## Document Maintenance Form

This form allows all details relating to a document, to be used in the 'Policy and Procedure Document' Function, to be set up.




*Document Maintenance Form*

### Document Code/Description

These fields allow a Document Code and Description to be entered.

### Document Summary

This field allows a Document Summary to be added to further identify the document.

### Document Type

This field allows selection of a Document Type from the dropdown. The available options are:

- External 'Windows' Document
- Internal System Note
- Internal System 'WP' Document

The Detail button is not available with the 'External Windows Document' option. The Detail Button attached to an 'Internal System Note' allows the user to detail out and create an Internal System Note via the Internal System Note Maintenance form. The Detail Button attached to an 'Internal System WP Document' allows the user to create a document through Pathway's Word Processing functionality.

### Document File Location

This field becomes available if 'External Windows Document' is selected. It allows a filepath to be entered or selected via the Pop Up.

### Document Restricted

Check this flag on if the document is to be restricted. The "Document Restricted" flag restricts the display of the document details when accessed from the Customer Service Search Profile and Selection forms. It ensures that the documents are accessible only when maintaining a request where the document belongs to a group that has been specifically assigned to the Request Type. The default value of this field will be false.

To control confidential documents, documents should be flagged as “Document Restricted” in Policy and Procedure Document Parameter Maintenance. This ensures that the document details will not be viewable from “Policy and Procedure Document Enquiry”. To view the document details the user must be on a Request that has the Policy and Procedure Group that contains the “Restricted Access” document assigned.

### Active

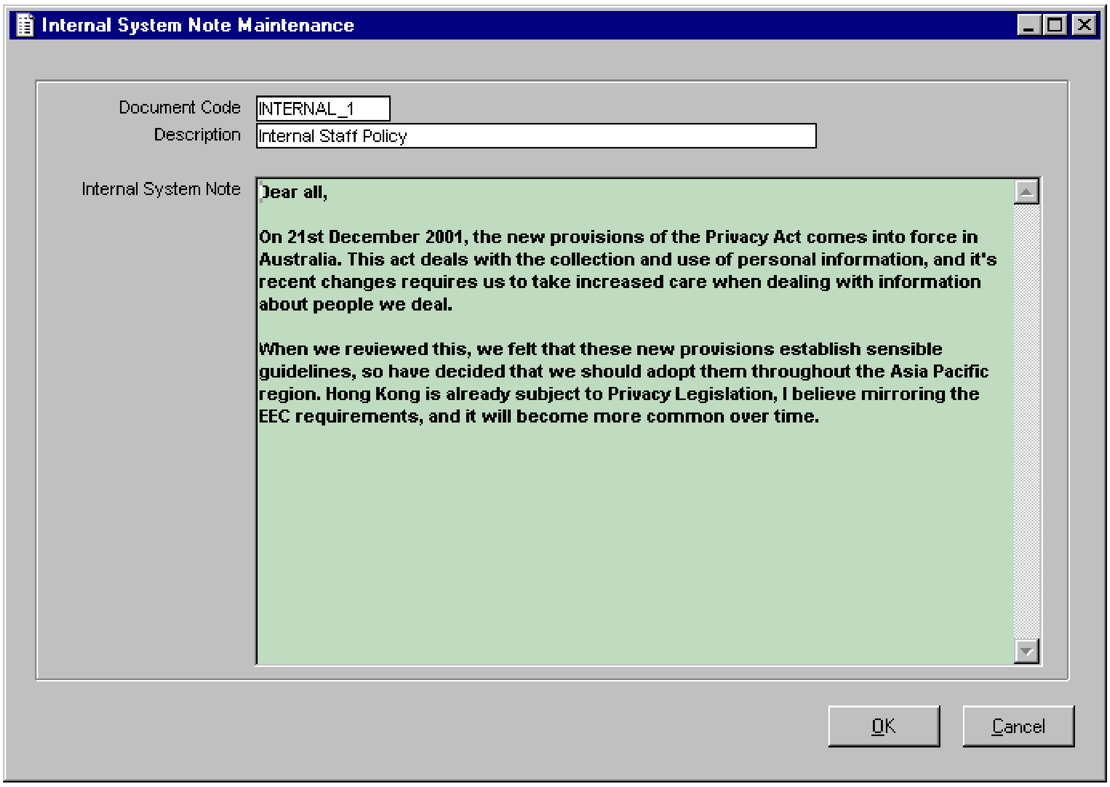
Check this flag on if the document is to be made available to the system. An inactive document will not be available for linking to a Request or Document Group.

### Options – Group to Document Linking

Selection of this option button displays the Group to Document Linking form where the document can be linked to existing Document Groups.

## Internal System Note Maintenance Form

This form allows the user to create an internal system note which will be linked to the specified document.




*Internal System Note Maintenance Form*

**Document Code/Description**

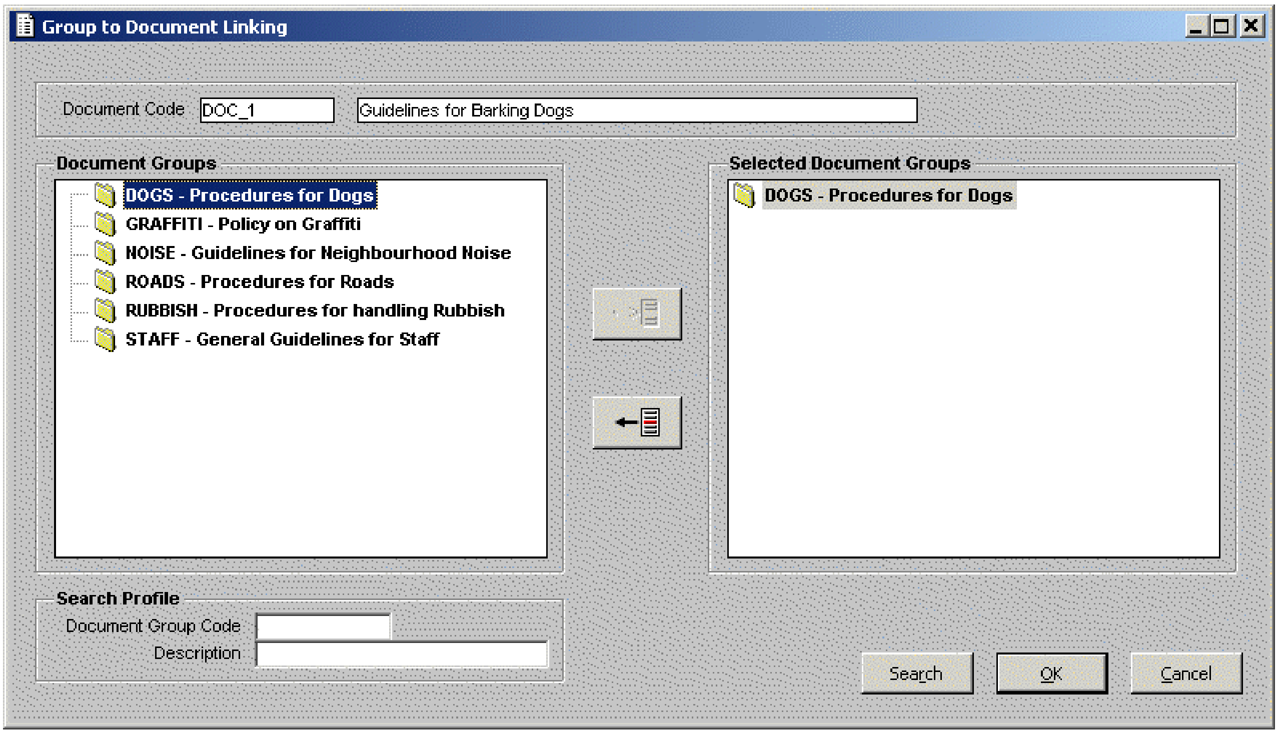
These fields display the Document Group and Description selected in the previous form. These fields are display only and cannot be maintained.

**Internal System Note**

This field is only available if the document type is 'Internal System Document'. It allows the user to key in the required details. There is no size restriction on this field.

## Group to Document Linking Form

This form allows the user to select Document Groups to which the document is to be linked. Use the Select and Remove buttons to select a Document Group from the left hand window. Once selected the Document Group will be copied to the right hand window (however, it will not be removed from the left hand window). Selected documents may be deselected by focusing on the Document Group in the right hand window and clicking the Remove Button.




*Group to Document Linking Form*

### Document Code/Description

These fields display the Document Code and Description which is being maintained. These fields are display only and cannot be modified.

### Document Groups

This window displays existing Document Groups which are available for selection. The Document Groups display as a hierarchical Tree with parent and child groups. The branches of the tree may be expanded and collapsed using the mouse or keyboard arrow buttons. Items can be selected by focusing on the required group and using the 'Modify' button or F2. Initially, the Groups will display in a hierarchical fashion, however, if a Filter profile is specified, e.g. T*, the resultant Groups will be displayed at one level. Use the Select and Remove Buttons to select or deselect the groups. Once a group has been selected it will not be removed from the left hand window. The only indication that the group has already been selected is that the Select Button will not be available when the group has focus.

### Selected Document Groups

This window displays the Document Groups which have been selected to be linked to the document.

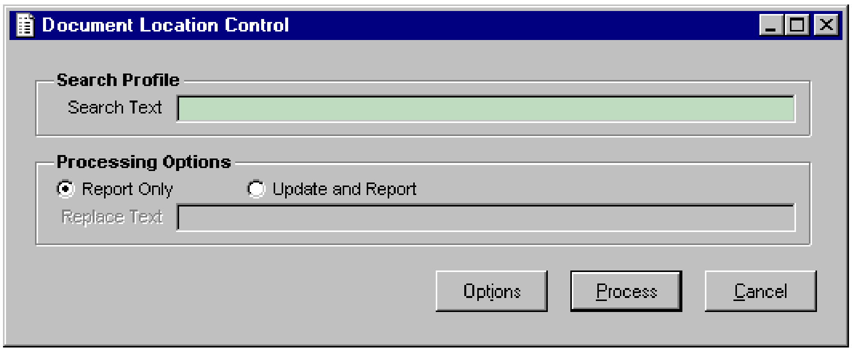
### Search Profile - Document Group Code/Description

A search profile may be entered in these fields to conduct a search over the Document Groups. This function is useful when there are a large number of Document Groups available. Wildcard searching is available. Using a filter will result in the retrieved Document Groups displaying at one level (i.e. not in a hierarchy).

## Document Location Control Form

This form provides a batch mechanism for updating the stored 'File Path' data for external documents. This is particularly useful if users rearrange their server directory structures, thereby invalidating the file paths stored in Customer Service.
The function provides a 'Report Only' and 'Report and Update' facility. The user is required to enter a search string (using wildcard characters as necessary) and if the Update option is selected, a replacement string needs also to be specified. The replacement string is then used to overwrite all occurrences of the search string. Note: No wildcard characters are allowed in the Replacement Text.

**Note**: When in 'Report Only' mode it is permissible to use wildcard characters (Gold characters) in the Search Text. This will allow the user to scan all the Documents for File Paths matching their criteria. However, the form will NOT ALLOW wildcard characters to be used in 'Update and Report' mode Replacement Text. The user must enter the Search and Replace strings exactly as required, i.e. key in the exact text to be replaced.




*Document Location Control Form*

**Search Profile - Search Text**

Enter the exact text which is to be searched for. This could be an entire filepath or simply a part of it. In Report Only mode the Search Text can contain wildcard characters, however, in Update and Report mode, neither the Search Text nor the Replacement Text can contain wildcard characters.

The Search Text field allows upper and lower case characters.

**Note**: When in 'Report Only' mode it is permissible to use wildcard characters (Gold characters) in the Search Text. This will allow the user to scan all the Documents for File Paths matching their criteria. However, the form will NOT ALLOW wildcard characters to be used in 'Update and Report' mode Replacement Text. The user must enter the Search and Replace strings exactly as required, i.e. key in the exact text to be replaced.

**Processing Options**

The user may select from the following processing modes:

- Report Only
- Update and Report

In Report Only mode the user is able to conduct a search over a particular search string (e.g.. filepath) and produce a report

**Replace Text**

This field allows the user to enter text to replace the search string, i.e. the user must key in the exact text to replace the search string text.

The Replace Text field allows upper and lower case characters.

## Document Enquiry Form

All Request Filter and Selection forms have a Policy & Procedure Menu option. Although this menu option is visible to all users, its pulldown selections are only available where the Authority Code has been entered. On any of the Filter and Selection forms, selection of the menu bar pulldown option "Policy & Procedure Documents" will display the Document Enquiry form. This form incorporates a 'Tree' style display of Document Groups in the left hand pane, and a list of documents linked to the currently highlighted Group in the right hand pane. Additionally, below the Documents list is a Document Summary which shows the Document Type and Document Summary (for Documents that are not 'Restricted') for the currently highlighted Document in the list. The displayed hierarchy of Document Groups can be navigated by expanding or collapsing the displayed branches of the 'Tree'. Alternatively, a Retrieve Profile may be entered, which will display all the Groups that match the profile (not as a hierarchy).

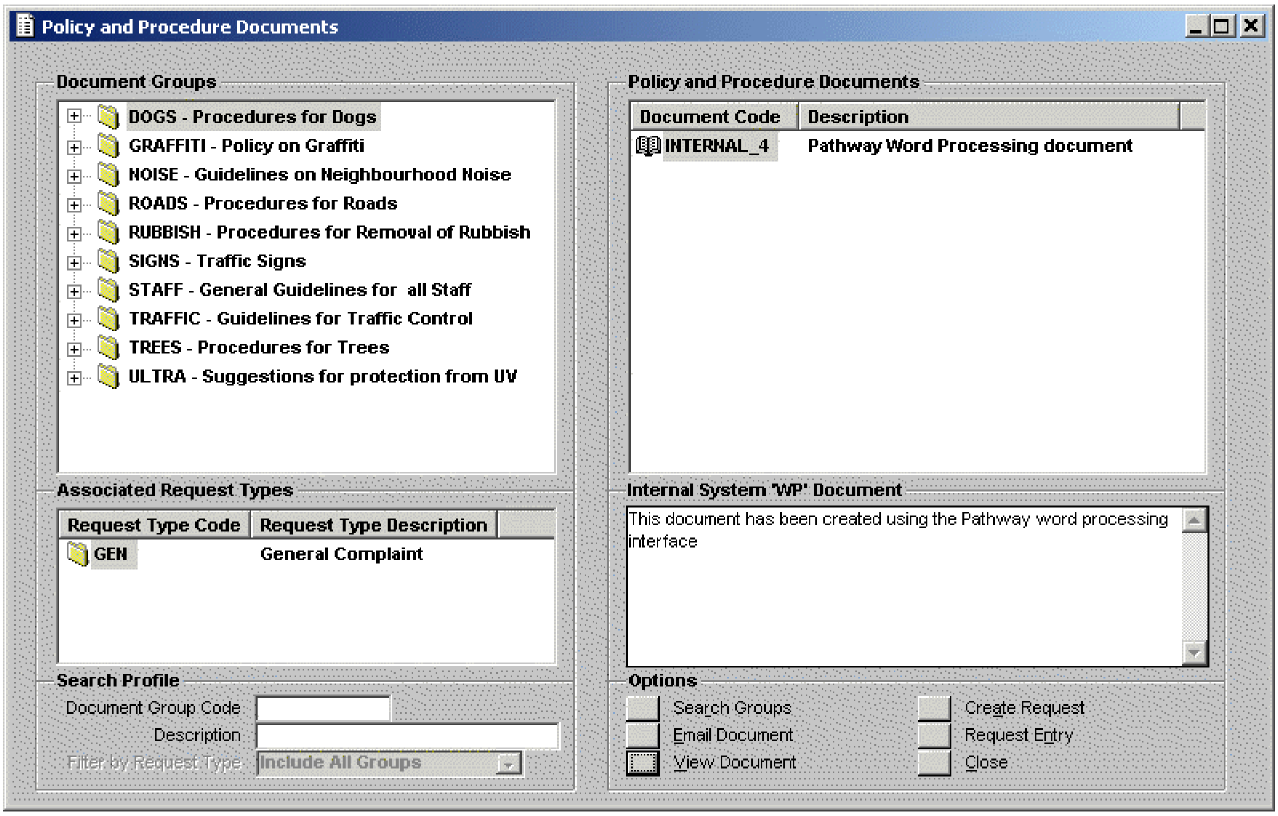
**Note**: When the Enquiry form is displayed from a Filter or Selection form there is no associated Request Type, and so the 'Filter by Request Type' options will be dimmed and not accessible.

By highlighting a single document in the right hand pane it is possible to click the 'View' button and have the document displayed based on its Document Type. (Restricted Documents cannot be viewed).

It is also possible to email one or more Documents to a customer. To do this highlight one or more Documents in the right hand pane and then click on the 'Email' Button. (Restricted Documents cannot be emailed to anyone). Having selected one or more Documents to be emailed, an 'Email Policy & Procedure Document' form will display. This form allows the user to enter recipient email addresses (click on the Insert Button). Also the Subject and Body Text of the email message may be entered or changed. The Documents selected to be sent may be included in the email in the following ways:

- For "Internal System Notes" the text of the Document will be inserted into the Body Text of the message
- For "Internal System 'WP' Documents" the Document will be resolved by the WP Interface and then included as an Attachment to the email.
- "External 'Windows' Documents" that can actually be resolved as 'real' files will be included as an Attachment to the email. If the file cannot be found, or if it is a known URL type, then the Document 'Link', or File Path, will be included as Body Text in the message. (For URL type links the receiving email client will display the text as an active link).

The user must specify at least one primary recipient, then click 'Send' to have the email processed. (If successful, the item will appear in the 'Sent Items' folder of the user's local email client.)



*Document Enquiry Form*

### Document Groups

All active Document Groups are displayed in the left hand pane of this form in a 'Tree' style display. If this form is accessed via Request Maintenance, then the list of Document Groups is filtered by the Request Type and will only display (not in a hierarchical fashion) Document Groups which are linked with the

Request Type. Selecting the 'Include All Groups' option in the 'Filter by Request Type' section will display ALL document groups in a hierarchical Tree style.
The displayed hierarchy of Document Groups can be navigated by expanding or collapsing the displayed branches of the 'Tree'. Alternatively, a Retrieve Profile may be entered, which will display all the Groups that match the profile (not as a hierarchy).

**Policy & Procedure Documents**
When a Document Group is highlighted in the left hand pane, the right hand pane displays the Documents associated with the Document Group.

**Associated Request Types**
This window will display any Request Types that have been associated to the Policy & Procedure Document Groups. The details will include the Request Type Code and Description. Clicking the field labels in the title bar will allow the details in this pane to be sorted.

**Document Summary**
This field displays the Document Type and Summary (for Documents that are not 'Restricted') for the currently highlighted Document in the list.

**Search Profile - Document Group Code/Description**

A search profile may be entered in these fields to conduct a search over the Document Groups. This function is useful when there are a large number of Document Groups available. Wildcard searching is available. Using a filter will result in the retrieved Document Groups displaying at one level (i.e. not in a hierarchy).

**Filter by Request Type**
The 'Filter by Request Type' radio buttons allow the display of Document Groups to be toggled between ALL Document Groups and those associated with the Request Type. The options are:
- Include Only Related Groups
- Include All Groups

**Options – Search Groups**
Selection of this button will allow a search to be carried out over the Document Groups based on the search criteria.

**Options - Email Document Button**
It is possible to email one or more Documents to a customer. To do this highlight one or more Documents in the right hand pane and then click on the 'Email' Button. (Restricted Documents cannot be emailed to anyone). Having selected one or more Documents to be emailed, an 'Email Policy & Procedure Document' form will display. This form allows the user to enter recipient email addresses (click on the Insert Button). Also the Subject and Body Text of the email message may be entered or changed. The Documents selected to be sent may be included in the email in the following ways:
- For "Internal System Notes" the text of the Document will be inserted into the Body Text of the message
- For "Internal System 'WP' Documents" the Document will be resolved by the WP Interface and then included as an Attachment to the email.
- "External 'Windows' Documents" that can actually be resolved as 'real' files will be included as an Attachment to the email. If the file cannot be found, or if it is a known URL type, then the Document 'Link', or File Path, will be included as Body Text in the message. (For URL type links the receiving email client will display the text as an active link).

The user must specify at least one primary recipient, then click 'Send' to have the email processed. (If successful, the item will appear in the 'Sent Items' folder of the user's local email client.)

**Options - View Document Button**
Documents may be viewed on the screen. To do this, highlight a single document in the right hand pane, then click the View Button.

**Options – Create Request**
Selecting the Create Request option button will display the Customer Service Request Entry screen. (This option has a short cut to allow keyboard access to the option i.e. Alt+A).
This button enables the user to create a new Request using the selected Request Type, and may automatically create a link to the selected document. If the Request Type has ‘Automatic Search’

checked on then the process will execute the Automatic Search process before the user will be able to enter any details into the Request. This will allow the user to immediately determine whether the Request that is being raised has already been recorded and that the new Request will become a secondary Request.
If no Request Type was selected then the user will be presented with the Request Entry screen to allow entry of a new Request.

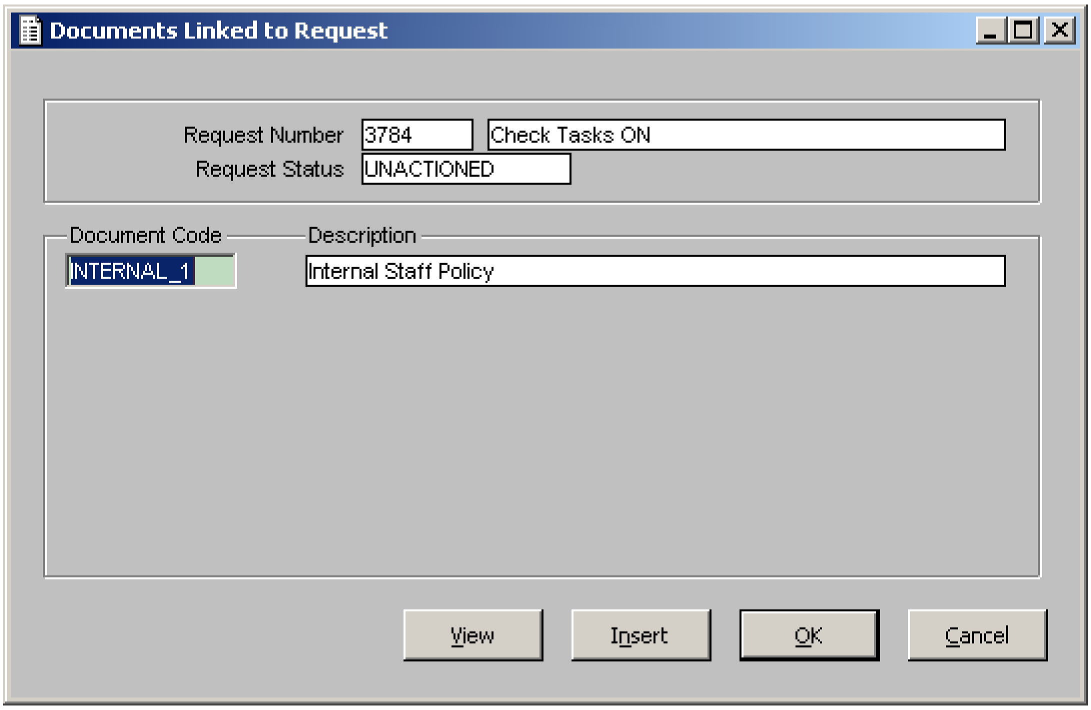
**Options – Request Entry**
The Request Entry option button allows normal Request Entry to take place. This button allows access to the Request Search Profile form. The label will be ‘Request Enquiry’ when the Policy & Procedure Document form is called via an enquiry mode process and the label will be ‘Request Entry’ when the Policy & Procedure Document form is called via a maintenance process.

**Close Button**
Selection of the Close button will close the Policy & Procedure Documents form.

## Documents Linked to Request Form

The Documents Linked to Request form displays when the user has a Request open and selects the Policy and Procedure Document/s option from the Options pull-down menu. Any already linked documents are displayed. The user is able to link additional documents by using the Insert button and selecting or keying in a valid document name.

If the ‘Link Policy & Procedure Document’ flag is checked ON at Request Type Parameters, and the user selects the ‘Policy and Procedure Documents – Request Entry’ menu option. The Document selected prior to creating a new Request will become linked to the newly created Request.



*Documents linked to Request Form*

**Request Number**
These fields display the Request Number, Description and Status of the selected Request

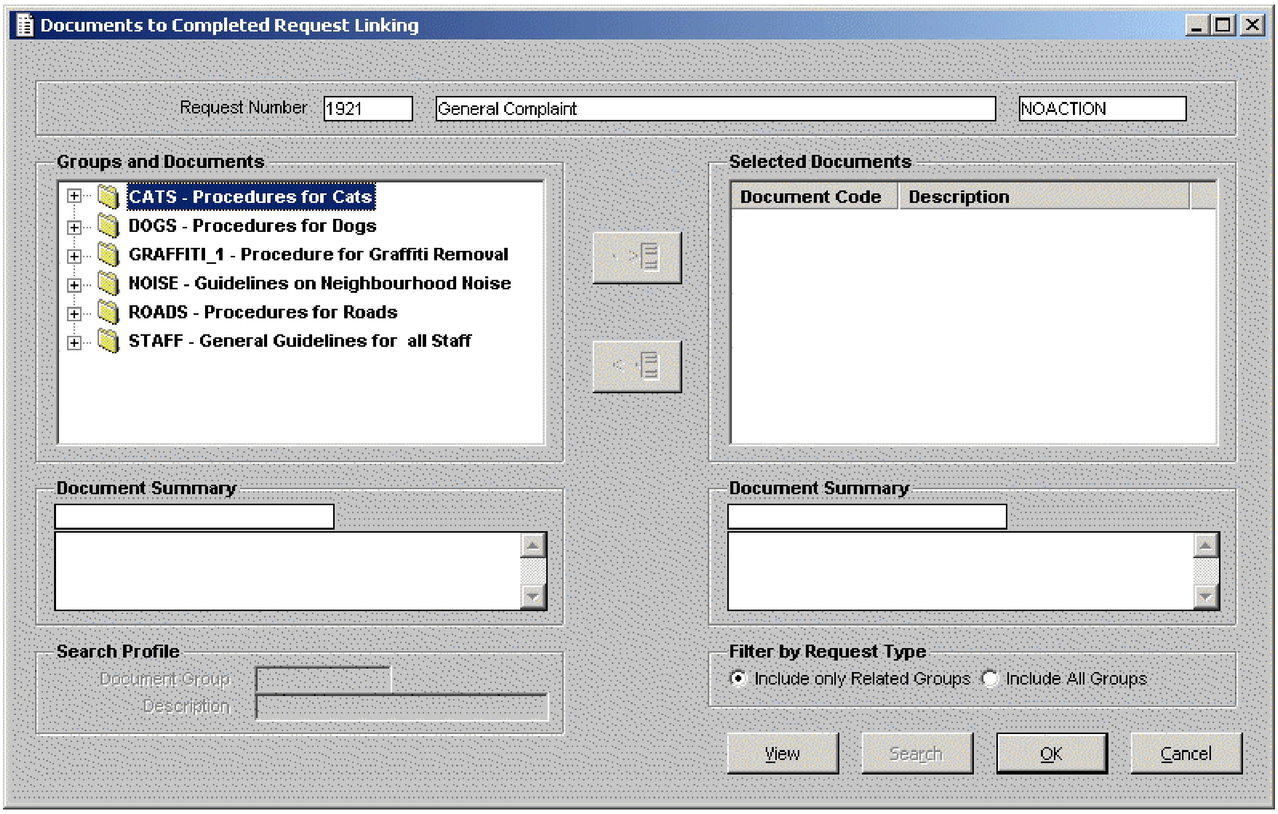
**Document Code/Description**

These fields allow documents to be linked to the Request. Documents may be inserted by selecting the Insert Button to add a blank occurrence, then keying in a Document Code or, alternatively, selecting one from the Pop Up.

**View Button**
Documents may be viewed on the screen. To do this, highlight a document then click the View Button.

## Documents To Completed Request Linking Form

This form displays upon completion of a Request which has Document Groups linked to the related Request Type. It allows the user to attach a document/s to the Request when the Request Status is changed to a completed status. If the Request Type has the flag 'Link Policy & Procedure Document' checked on at the Request Type Parameter level, then when a Request based on this Request Type is completed, this form will display to allow one or more documents to be linked to the Request.




*Documents to Completed Request Linking Form*

**Request Number**

These fields display the Request Number, Request Type and the Request Status of the current Request. These fields are display only and cannot be maintained.

**Groups and Documents**
This window displays the Document Groups and Documents available to be linked to the Request Type.

**Selected Documents**
This window displays the documents which have been selected for linking to the Request. The Select and Remove buttons can be used to select or deselect the documents.

**Document Summary**
These fields display the Document Type (Internal Note, External Windows Document etc) as well as the description of the document which has focus in the Groups and Documents window.

**Document Summary**

These fields display the Document Type (Internal Note, External Windows Document etc) as well as the description of the document which has focus in the Selected Documents window.

**Search Profile – Document Group/Description**

These fields may be used to conduct a search over the Groups and Documents window by Document Group and/or Description.

**Filter by Request Type**

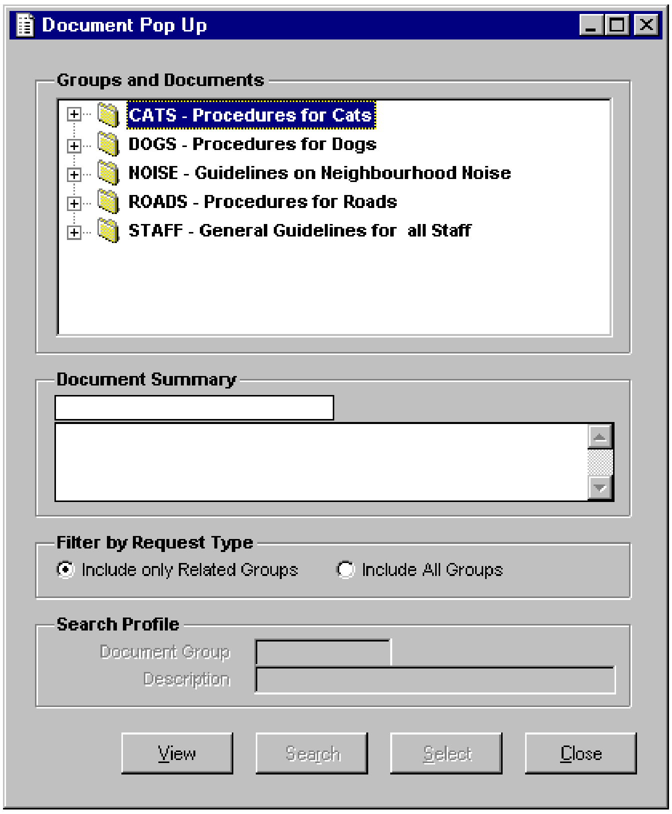
A filter may be used to limit the display of Groups and documents to Groups related to the Request Type. The options available are:

- Include only Related Groups
- Include All Groups

Selection is by radio button.

## Document Pop Up Form

This form displays existing Document Groups and Documents which are available for selection.




*Document Pop Up Form*

**Groups and Documents**

This window displays existing Document Groups and Documents which are available for selection. The Document Groups display as a hierarchical Tree with parent and child groups. The branches of the tree may be expanded and collapsed using the mouse or keyboard arrow buttons. Items can be selected by focusing on the required group and using the 'Select' button or F2. Initially, the Groups will display in a hierarchical fashion, however, if a Filter profile is specified, e.g. T*, the resultant Groups will be displayed at one level.

The 'Select' Button will only be available when a Document is highlight. If focus is on a Document Group, then the 'Select' Button will be dimmed.

**Document Summary**

These fields display the Document Type and Summary (for Documents that are not 'Restricted') for the currently highlighted Document in the list.

**Filter by Request Type**

The 'Filter by Request Type' radio buttons allow the display of Document Groups to be toggled between ALL Document Groups and those associated with the Request Type. The options are:

- Include Only Related Groups
- Include All Groups

**Search Profile**

A search profile may be entered in these fields to conduct a search over the Document Groups. This function is useful when there are a large number of Document Groups available. Wildcard searching is available. Using a filter will result in the retrieved Document Groups displaying at one level (i.e. not in a hierarchy).

**View Button**

Documents may be viewed on the screen. To do this, highlight a single document then click the View Button.

# Reference Type Maintenance

The Customer Service >> Parameters >> Reference Type Maintenance menu option has been updated to include additional parameters, i.e. “Available to Public” and “NAR Mapping”, for Smart Mobile CityWatch.

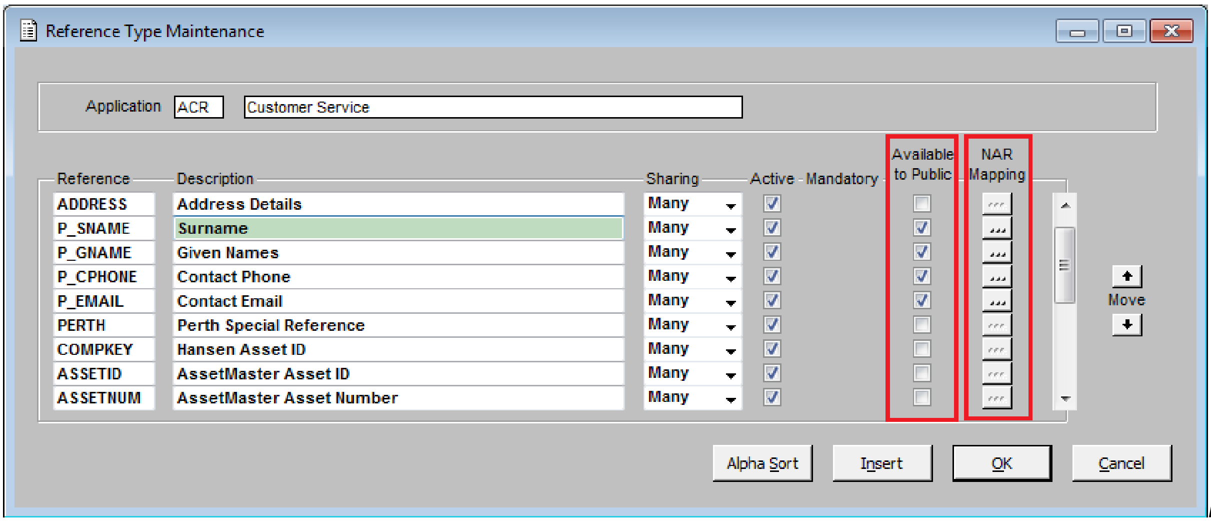


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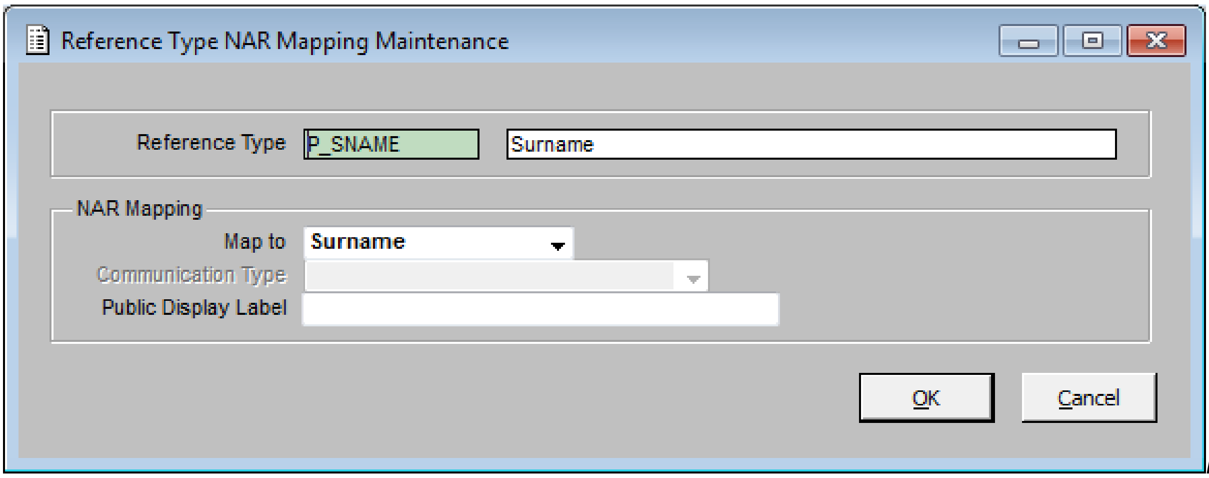
*Figure 1. Reference Type Maintenance (for Customer Service)*

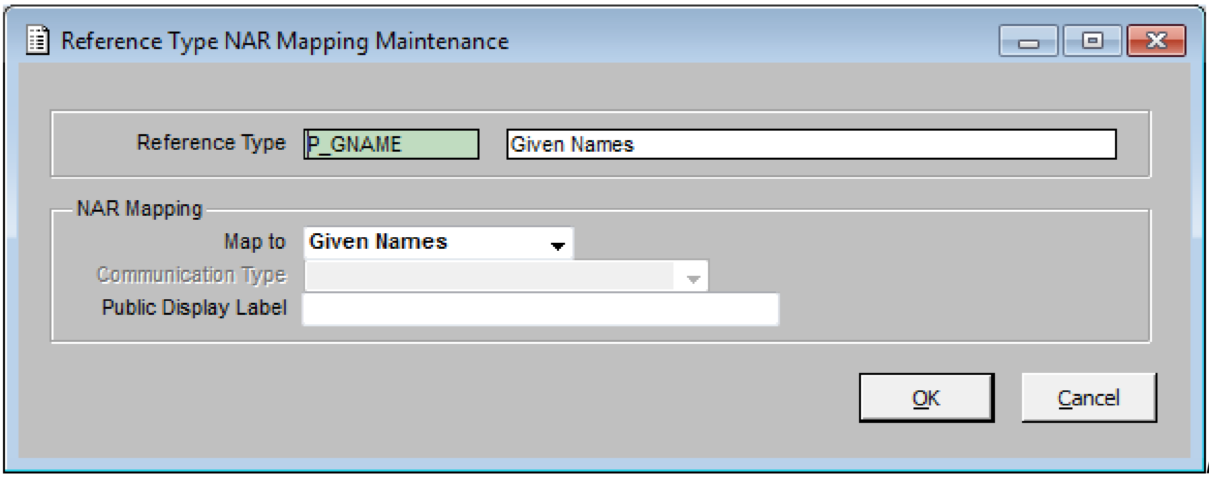
**Available to Public**
The “Available to Public” flag specifies whether the current reference type is available for the public user, i.e. only those reference types whose “Available to Public” flag is on will be available to CityWatch.

**NAR Mapping Maintenance**
The “NAR Mapping” allows mapping the current reference type to NAR’s “Surname”, “Given Names” or “Communication Type”. Detailing into the NAR mapping form allows the selection of which information will be mapped to the reference type.



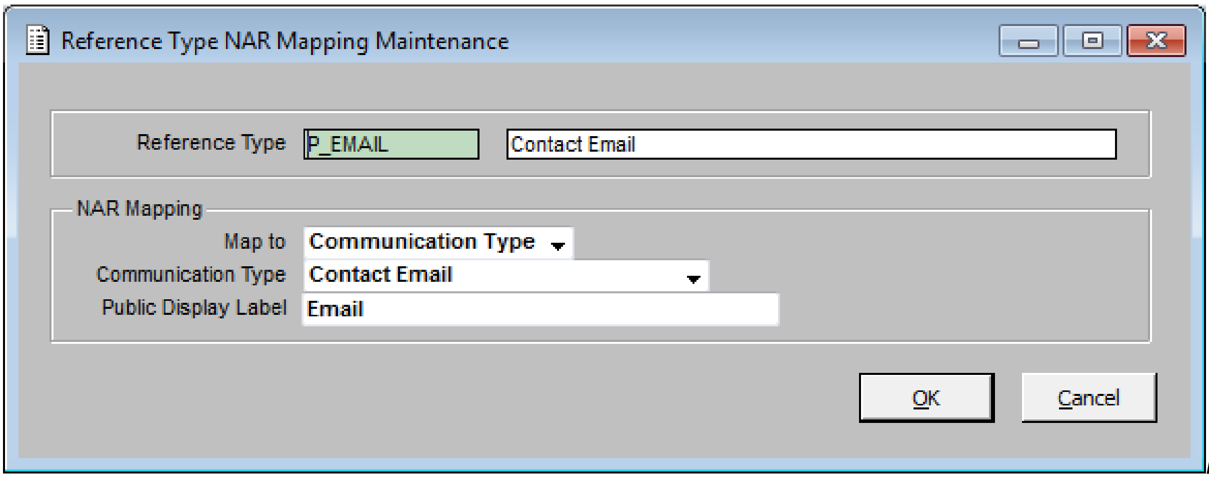
Fig

*Figure 2. Reference Type maps to NAR’s “Surname” field*



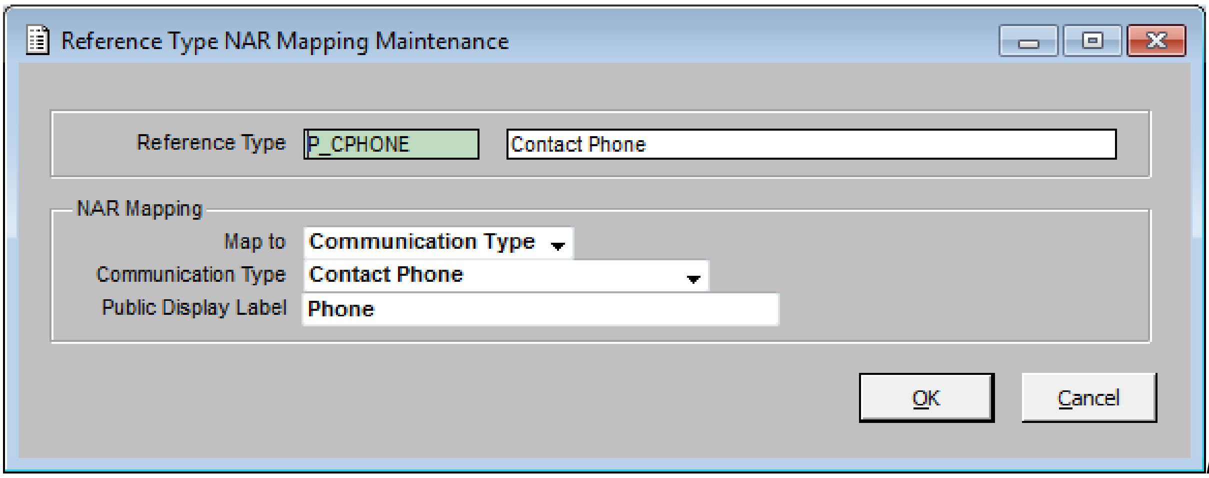

Fig

*Figure 3. Reference Type maps to NAR's "Given Names" field*




Fig

*Figure 4. Reference Type maps to NAR's "Contact Email" communication type*




Fig

*Figure 5. Reference Type maps to NAR's "Contact Phone" communication type*

Three mapping types are available:

- Surname – Map the reference type to NAR's "Surname" field (Figure 2)
- Given Names – Map the reference type to NAR's "Given Name" field (Figure 3)
- Communication Type – Map the reference type to one of the NAR's Communication Type (Figure 4 and 5)

Please note that only one reference type can be mapped to the “Surname” or “Given Name” field respectively. And the communication type mapping only allows for one reference type per communication type.

The form also allows the Smart Mobile CityWatch label (“Public Display Label”) to be specified. If no “Public Display Label” is specified then the default will be used; for the communication type fields the default will be the communication type’s description.

When Pathway receives the Request from CityWatch, the references for the Request will appear on the request under References. A technical prefix, for example “62=”, will be appended to the reference number for the communication details. Please do not remove the prefix if you wish to create a new Name later with these details or if you wish to find an existing Name and update the existing Name’s communication details.

When an officer receives the Request in Pathway and tries to add a Name link, Pathway will use the “Surname” and “Given Names” references to find existing Names within Pathway.

If an existing Name(s) is found, a Name selection screen will be displayed and allow the officer to choose a Name to link to the Request. On successfully linking the existing Name to the customer service request, the “prefix” of the Reference Number will be removed (e.g. 62=), and the existing Name’s communication details will be automatically updated with the information stored in the reference fields.

If an existing Name is not found, then the officer can create a new Name record. During the creation process, the new Name’s “Surname” and “Given Names” will be populated automatically based on the stored information from the reference fields. If the new Name has been saved successfully, the new Name’s communication details are updated automatically with the information stored in the reference fields, and the “prefix” or reference number is removed as well.

# History Log Action Parameters

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

Release 2.16 incorporates enhancements which provide for the logging of specific categories of data on, and related to a Customer Service Request. Additionally, new Secured Function Codes allow for these categories of information to be 'Blocked' from display on the various Request Summary information fields, both within the Customer Service module and in other related Pathway modules. By using a combination of these two features it is possible for users to control the viewing of information, and to track the activity on a Customer Service Request.

The various categories of information may be logged for any Modify and/or View activity, or not logged at all, as required. Whenever an occurrence of one of these categories is Created, Modified, Deleted or Viewed, in relation to a Customer Service Request, a log entry will be generated. In the case of 'Updates', the log data will include the 'Before' and 'After' values for the modified fields as well.

Note: When the Customer Service History Logging Authorised Function is checked ON then history logging will occur for all Request Types. The recorded History Log data will be available from Request Entry but the viewing of this information may be controlled by a Secured Function Code.

Note: This feature is separate from, and does not use existing Pathway Audit facilities. If configured, Pathway Auditing will be performed in addition to this logging facility.

Request Logging Categories

The following 'Categories' are available for logging. Each category is identified by a 'Data Code'.

- ANSWER Questionnaire Answer
- ASSOCREQ Associated Request Link
- ATTACH Attachment
- DOCREQS Letter Request
- DOCLINK Document
- DOCRESP Letter Response
- INSPECT Inspection
- JOBCARD Print Job Card
- MEMO Memo
- MODLNK Module Link
- NOTE Note
- P&PDOC Policy & Procedure Document
- REF Reference
- REQUEST Request
- SECREQ Secondary Request Link
- TASK Workflow Task

Authorised Function details

If the Authorised Function, 'Customer Service History Logging" is checked OFF (i.e. inactive) then the user will not have access to the History Log Report. In Customer Service>>Parameters>>System Parameters, the "History Log Merge Type" field will not be visible. When accessing Request Maintenance, the "History Log" option will not be visible on the Options menu. Additionally, the "View Req Summary" and "Access Request History Log" functions will not be among the Available Secured Functions on the Secured Functions Maintenance Form for a Request Type.

Request Summary - Secured Function Codes

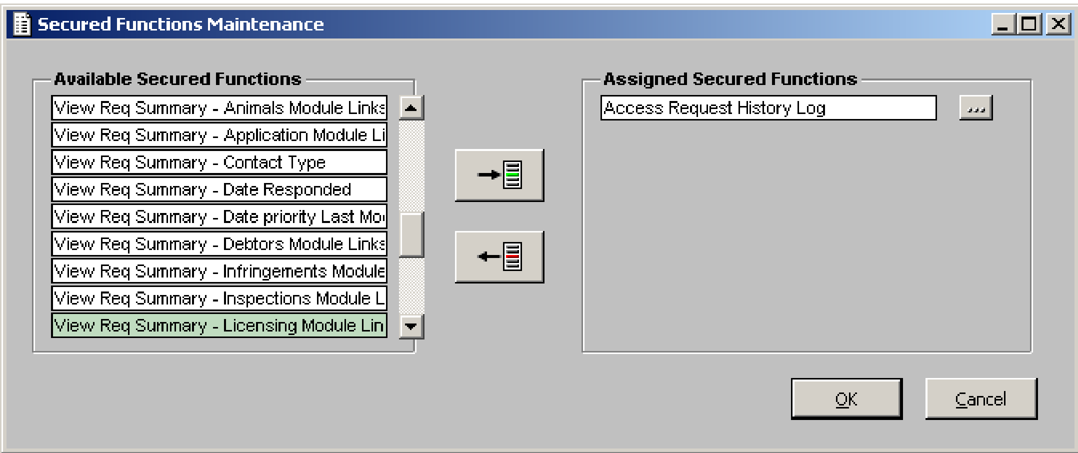
Additionally, there are 21 new Secured Function Codes defined for Customer Service. The first of these (Access Request History Log) grants access to the 'History Log' option in Request Maintenance. If this Function Code is unassigned, then the default action is to 'Disallow' the user from using the History Log option. The remaining 20 Function Codes define whether or not a user is to be allowed to view certain Request details in the various Summary Details forms. When these Function Codes are unassigned, then the default action is to 'Allow' the users to see the associated Request details. (refer to Secured Functions details in Request Type Parameters - 69)

Note: If you do nothing with these new parameters and Secured Functions, the system should operate as normal.

The following Secured Function Code provides for the control of access to the History Log and of the viewing of Request information on the various selection forms etc that include Request Summary information.

As with other Secured Function Codes these are assigned by Request Type.

- Access Request History Log




**Note:** When unassigned, or when assigned and a User is not named, this function code will ***DISALLOW*** users access to the History Log Enquiry, so it is necessary to explicitly grant user authority to this function.

The following Secured Functions are also controlled by the Customer Service History Logging Authorised Function, but, unrelated to history logging, they control whether certain categories of Request Summary details are able to be viewed by a user.

- View Req Summary - Animals Module Links
- View Req Summary - Application Module Links
- View Req Summary - Contact Type
- View Req Summary - Date Responded
- View Req Summary - Date priority Last Modified
- View Req Summary - Debtors Module Links
- View Req Summary - Infringements Module Links
- View Req Summary - Inspections Module Links
- View Req Summary - Licensing Module Links
- View Req Summary - Names Module Links
- View Req Summary - Property Module Links
- View Req Summary - Rates Module Links
- View Req Summary - References
- View Req Summary - Registers Module Links

- View Req Summary - Request Notes
- View Req Summary - Request Priority
- View Req Summary - Request Receiving Officer
- View Req Summary - Requestor Type
- View Req Summary - Respond by Date
- View Req Summary - Time Taken

**Note:** When unassigned, these function codes will *ALLOW* users to view the associated information. Once assigned, however, a User must be named on a Function Code in order to see the associated information in any Request Summary fields. Otherwise, the message '*** Details Blocked ***' will be shown instead. **Please note that, as a result of enhancements to improve performance, it may now be necessary to restart Pathway sessions in order for changes to Secured Function authorities to take effect.**

(Refer to further details in Request History - 224)

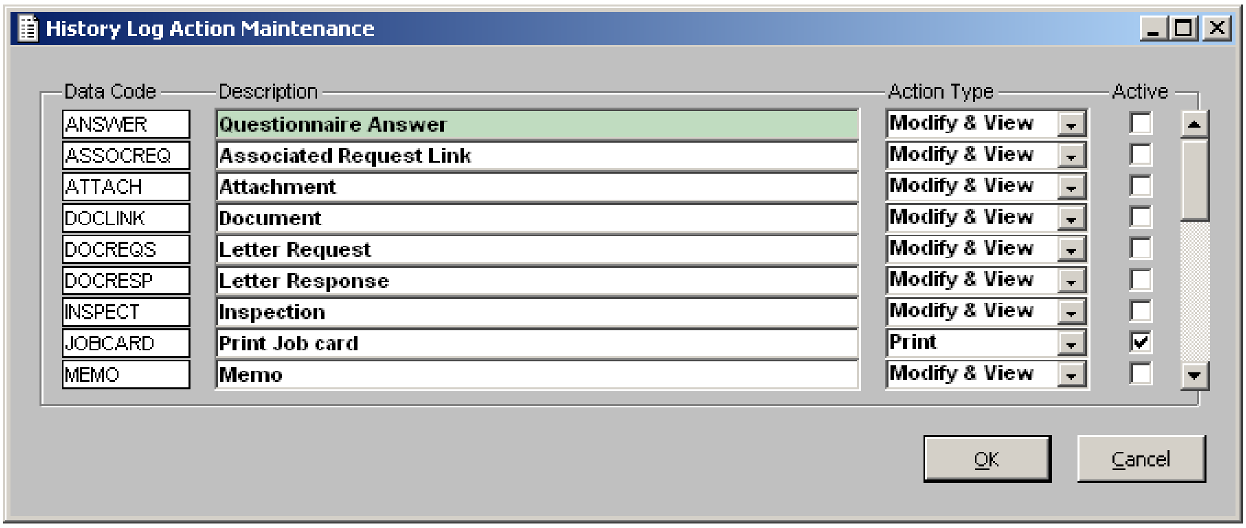
## History Log Action Maintenance Form

The History Log Action Maintenance form provides the ability to define what level of logging, if any, is to be performed for each of the Data Codes.

The Data Codes and their default descriptions are delivered as Initial Data with the Pathway Software Release. The very first time that the History Log Action Maintenance form is run, the Action Type parameter table will be populated with the default set of Data Codes. It is then up to the user to define which Data Codes are to be 'Active', and what level of logging is required. Additionally the Data Code descriptions may be altered to better suit your installation, and to match the other User Defined Labels that may also exist for Customer Service.

**NOTE:** It is NOT necessary for you to perform this maintenance if you do not wish to make use of the new History Logging facilities. If no action is taken, the Customer Service system will continue to operate normally. If this parameter maintenance option is executed, all the parameter records are initially set to 'Inactive' so that, once again, the Customer Service system will continue to operate normally. It is necessary for specific action to be taken to enable the logging of any of the Data Code categories.

As soon as any of the Data Codes have been made 'Active', logging of information relating to that Data Code will begin, once new Pathway sessions have been be started.



**Data Code / Description**

These fields display the Data Codes and their default Descriptions. The very first time that the History Log Action Maintenance form is run, the table will be populated with the default set of Data Codes. It is then up to the user to define which Data Codes are to be 'Active' and what level of logging is required.

> Note: The Data Code descriptions may be altered to better suit your installation, and to match the other User Defined Labels that may also exist for Customer Service.

**Action Type**

The Action Type field allows an Action Type to be selected from a dropdown list. The options available are as follows:

- Modify and View
- Modify
- View
- Print

**Active**

Initially, all Action parameters are set to 'Inactive' and hence no logging occurs. As soon as any of the Data Codes have been made 'Active', logging of information relating to that Data Code will begin, once a new Pathway session has been started.

# Maintenance

This section describes the process involved in maintaining Customer Requests.

The following topic is covered in this chapter:

Request Locking
Request Entry
Questionnaire Maintenance
Associated Requests
Request History
Multi Request Maintenance
Bulk Functions

# Request Locking

Pathway Customer Service now ensures that a given user has exclusive access to a Request while they have it open in Request Entry/Maintenance, i.e. Locking a Request in Request Entry/Maintenance.

Only the locking user or ‘SCASYS’ (System Administrator) can maintain a locked Request. If a Request is locked by other users other than the current user and ‘SCASYS’, the Request will be available for enquiry only.

Various Request Selection Forms have the facility to indicate whether a Request is locked and by whom.

All batch functions which intend to update Request(s) check the locking on a Request. If a Request is locked by any user, no update will be performed.

**Request Maintenance**

***Display mode or Maintenance mode***
Request Maintenance now checks whether a selected Request is currently locked or not.

If a Request is locked and the current user is the locking user, the Request is still maintainable. In most cases it means that the current user is maintaining the Request in another Request Maintenance session. (The user should avoid maintaining the same Request on different sessions as it might cause a database update error.)

If a Request is locked and the current logon user is not the locking user and not ‘SCASYS’, a message is displayed to indicate the Request is locked and will be available for enquiry only, as shown below:


*A warning message to indicate a Request is locked by another user*

If a Request is locked and the current logon user is the ‘SCASYS’, a message is displayed to indicate the Request is locked and either ‘Display’ mode or ‘Maintenance’ mode are available for selection, as shown below:


*A warning message shows the Request is locked*

If ‘Display’ is selected, the Request is displayed in enquiry mode. If ‘Maintenance’ is selected, the Request is displayed in maintenance mode.

***Update Secondary Requests***
When modifying the Status of a Primary Request, its Secondary Requests will be checked to see whether any of them are being locked or not. If one of the Secondary Requests is locked by another user, an error message ‘Secondary Request xxx is locked by xxx and cannot be updated’ is displayed, as shown below:


*An error message shows Secondary Request is locked by another user*

The Primary Request can be updated and its Status will be copied to all Secondary Requests if the logon user is the locking user or ‘SCASYS’.

***Delete a Request***

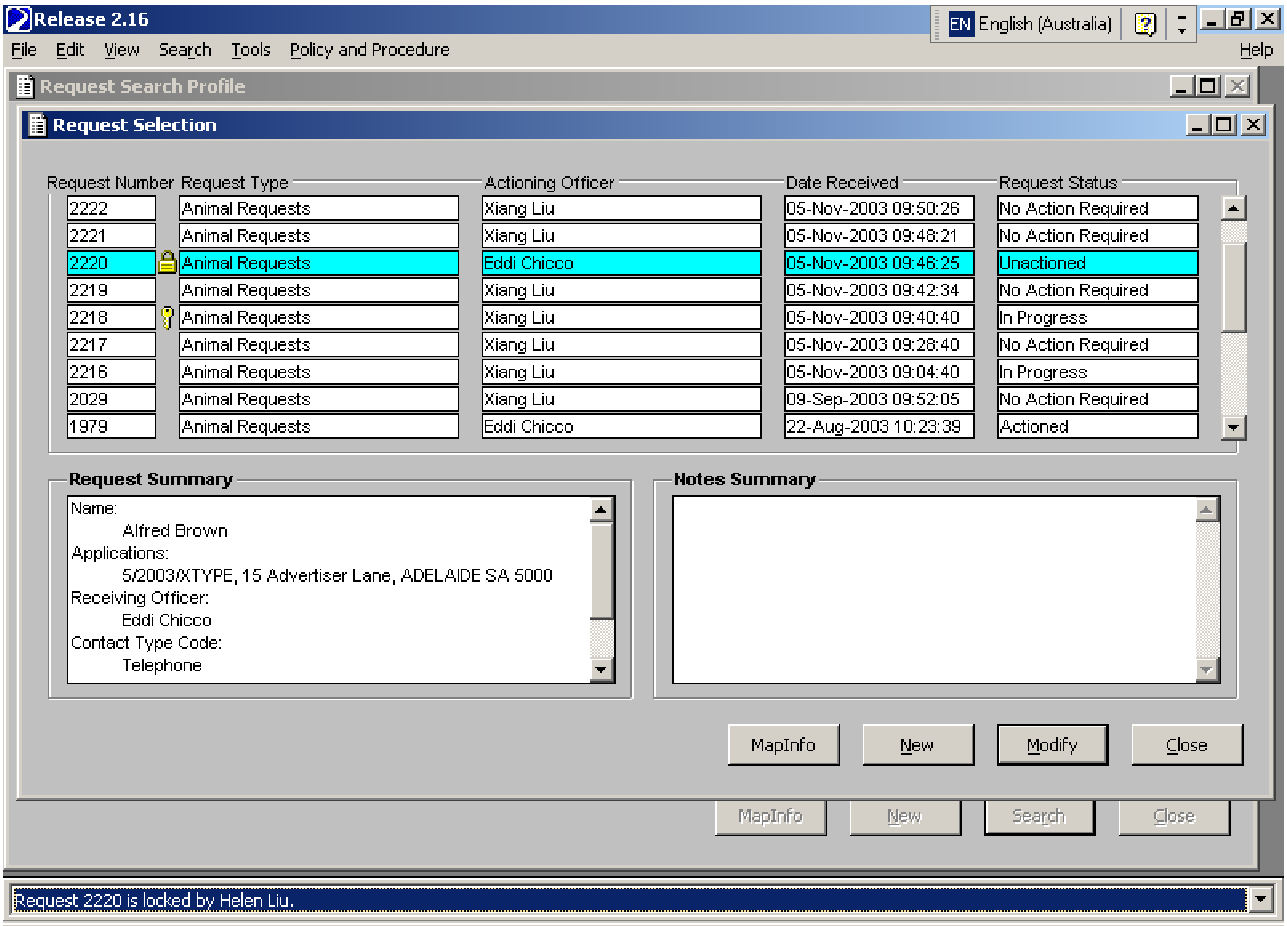
When deleting a Primary Request, a check is made to see whether its Secondary Requests are locked or not. If one of the Secondary Requests is locked by a user other than the current user or ‘SCASYS’, an error message ‘Secondary Request xxx is locked by xxx, and cannot be deleted’ is displayed and no deletion can be performed, as shown below:


*An error message shows Secondary Request is locked by other user*

The Primary Request and its Secondary Requests, including the locked Secondary Request(s), can be deleted if the current user is the locking user or ‘SCASYS’.

**Request Selection**

The Request Selection form will now display a little key and a little lock to indicate that a Request is locked. If a Request is locked and the current logon user is the locking user or ‘SCASYS’, the little key is displayed to indicate the Request is locked but the user still can maintain it. If a Request is locked and the current logon user is not the locking user or ‘SCASYS’, the little lock is displayed to indicate the Request is locked and will be available for enquiry only. When a locked Request gets focus, a message ‘Request xxx is locked by xxx’ is displayed in the Status bar, as shown below (the logon user is not ‘Helen Liu’ and is not System Administrator):

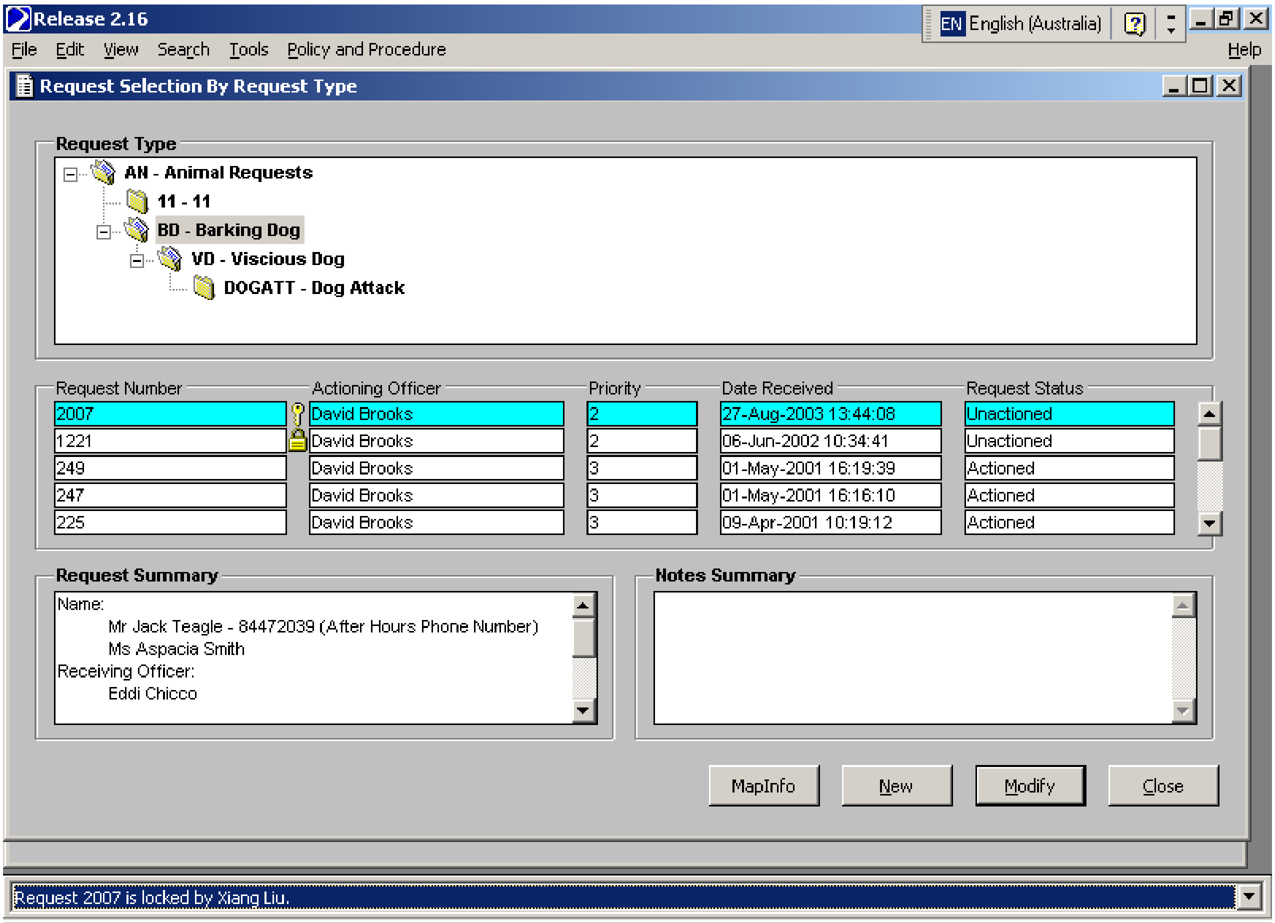



*Request Selection form shows locking details against Requests*

Requests which are in the process of being added (i.e. still in Request Entry) are not available in the Request Selection form if the current logon user is not the ‘creator’ and is not ‘SCASYS’. Otherwise they will be available for selection.

**Request Selection (Including Child Request Types’ Requests)**

Similarly, another Request Selection form, which also displays the Child Request Types’ Requests, will now display the locking details against Requests., as shown below (the logon user is ‘Xiang Liu’):

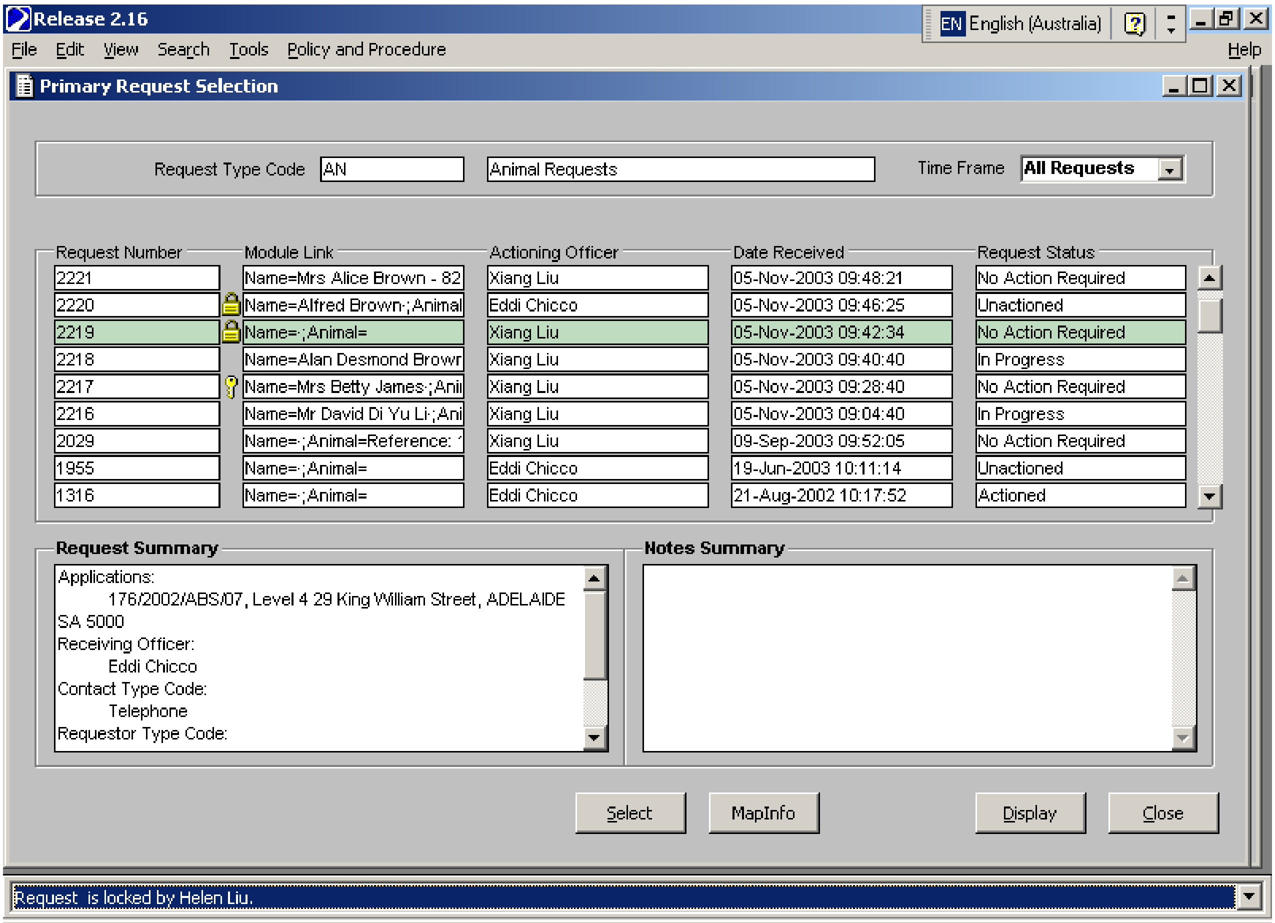



*Request Selection form shows locking details against the Child Requests*

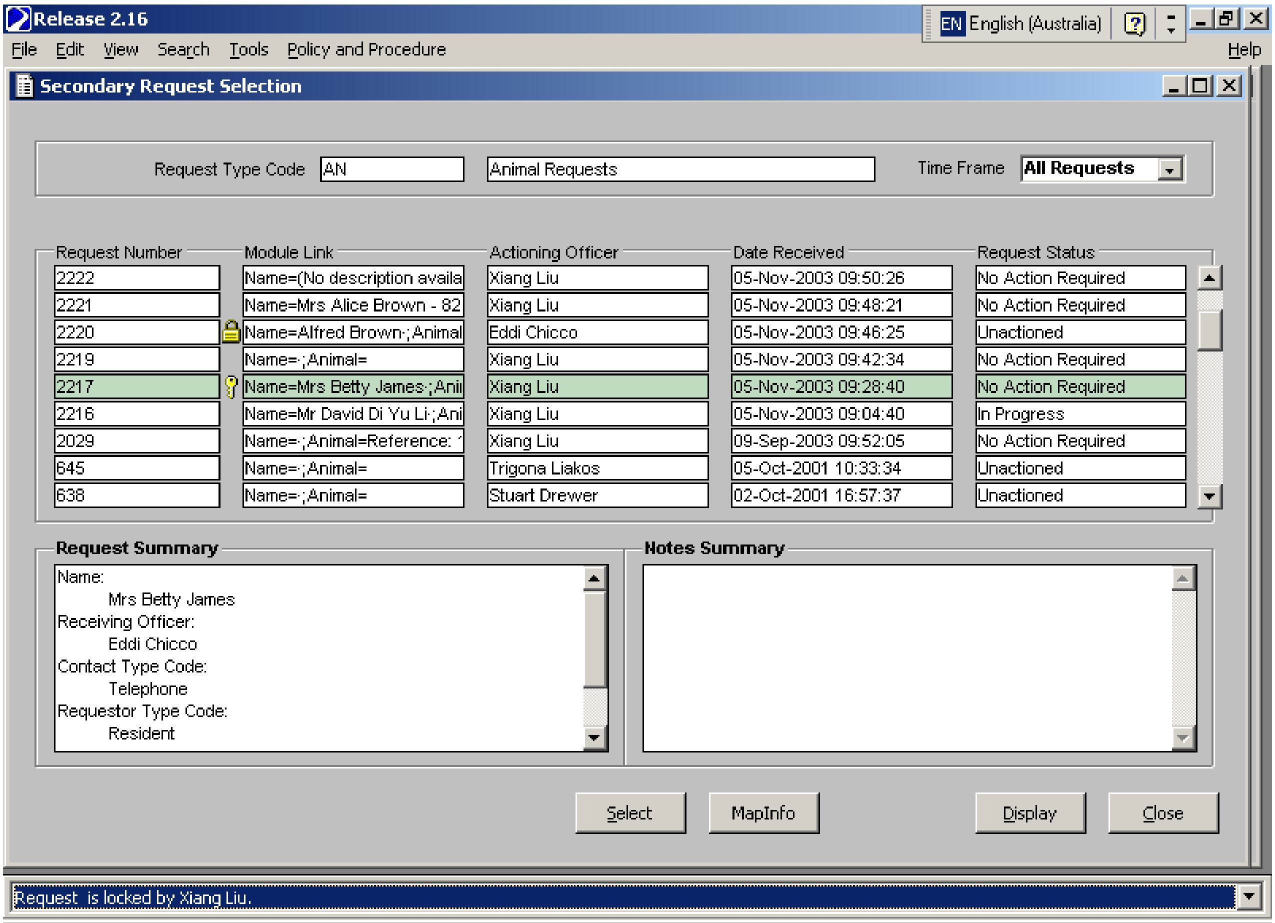
Similarly, Requests which are in the process of being added are not available in the Request Selection form if the current logon user is not the 'creator' and not 'SCASYS'.

**Primary/Secondary Request Selection**

Similar to the Request Selection form, the Primary/Secondary Request Selection form for linking Requests will now display the little lock or little key to indicate a locked Request. When the locked Request gets focus, the message 'Request xxx is locked by xxx' is displayed in the Status bar at the bottom of the window,. as shown below (The user who is logged on is 'Xiang Liu'):




*Primary Request Selection*

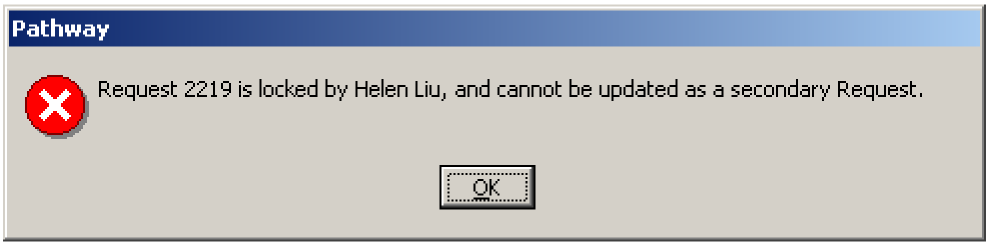



*Secondary Request Selection*

The Request being added is displayed on this selection form.

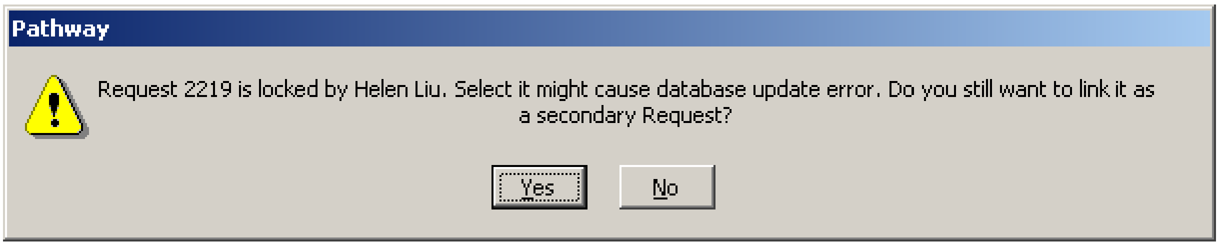
All locked Requests are available to be selected as a Primary Request.

If a locked Request is selected as a Secondary Request, and the current user is not the locking user or 'SCASYS', an error message 'Request xxx is locked by xxx, and cannot be updated as a secondary Request' is displayed and no link will be performed, as shown below:



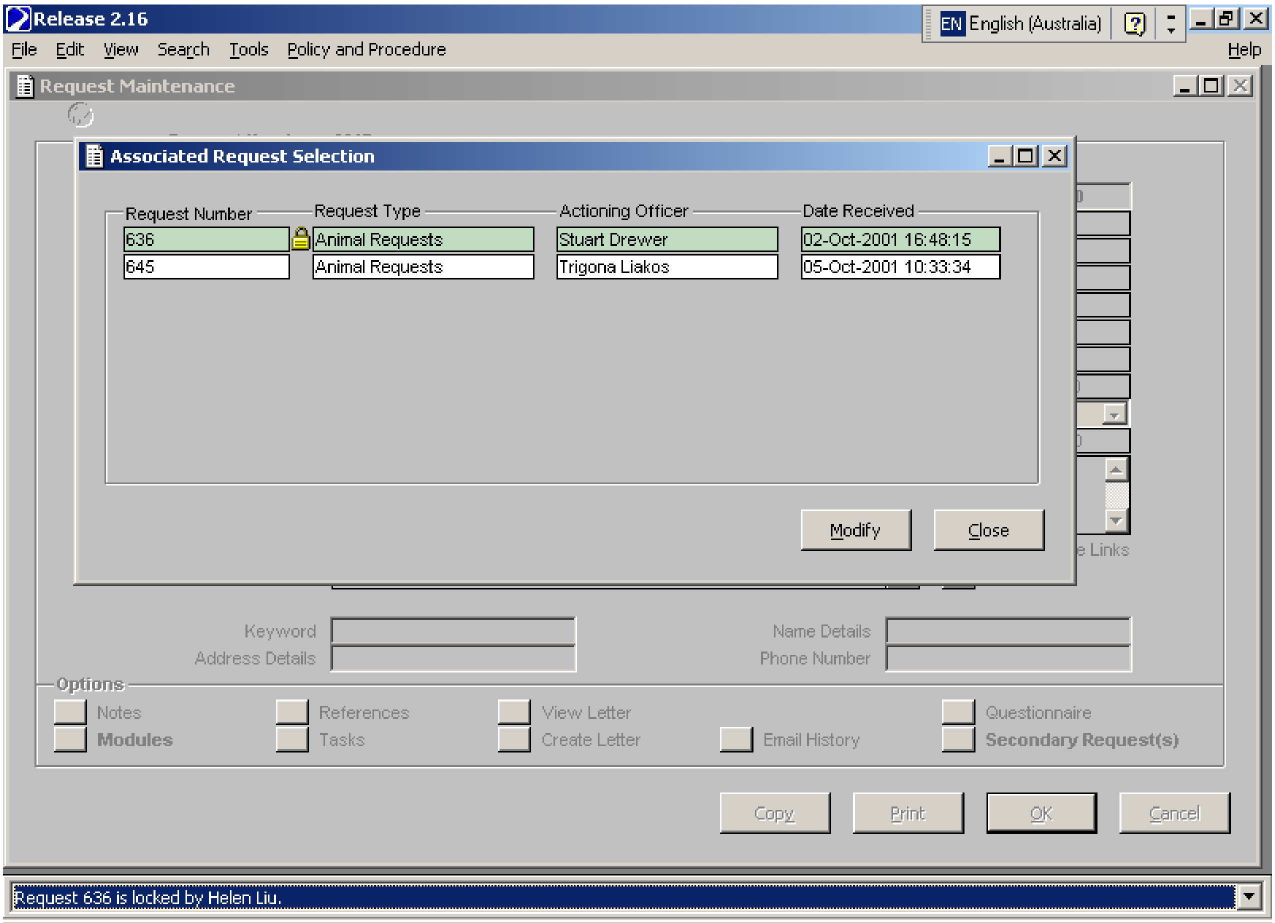

*Error message for Secondary Request Selection*

If a locked Request is selected as a Secondary Request, and the current user is 'SCASYS', a warning message is displayed to indicate the lock (as shown below). If the user selects 'Yes', the locked Request will be selected as a Secondary Request. Otherwise, no link is performed.




*Warning message for the System Administrator for Secondary Request Selection*

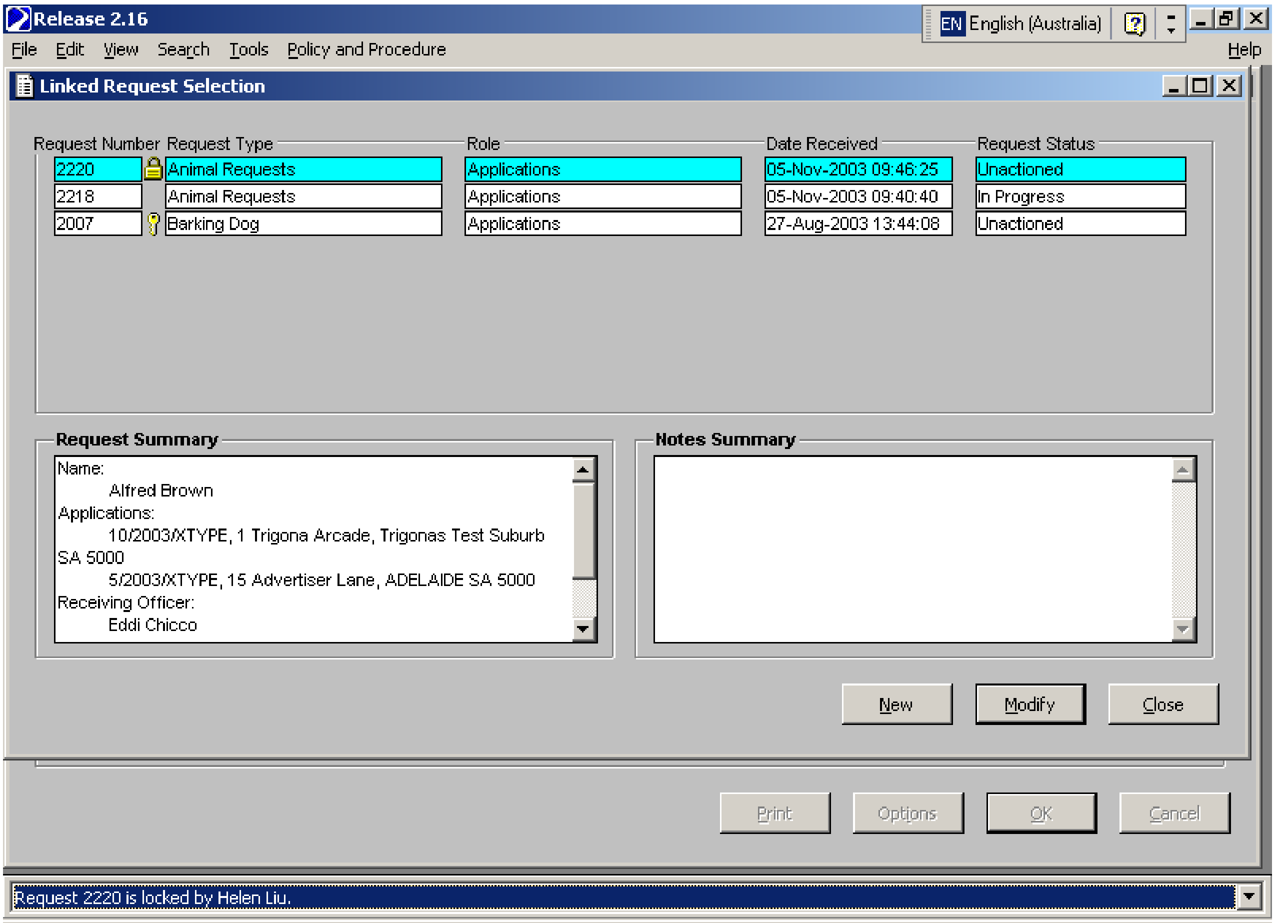
**Associated Request Selection**
The Associated Request Selection form has been modified to display the little lock or little key to indicate the lock on a Request. When a locked Request gets focus, a message 'Request xxx is locked by xxx' is displayed in the Status bar at the bottom of the window, as shown below:




*Associated Request Selection*

**Linked Request Selection**

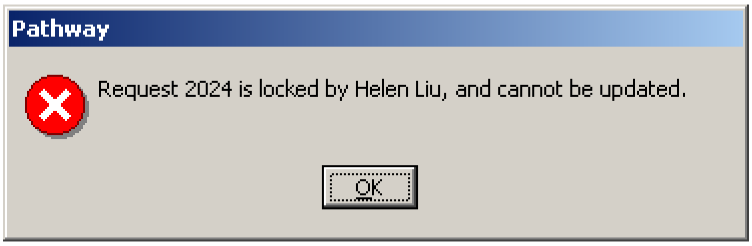
The Linked Request Selection form has been modified to display the little lock or little key to indicate that a lock exists on a Request. When a locked Request gets focus, a message 'Request xxx is locked by xxx' is displayed in the Status bar at the bottom of the window, as shown below:



*Linked Request Selection*

## Workflow System Action Execution

When a user intends to modify the Status of a Request using a Task which contains the system action to update a Request's Status, a check will be made to see whether the Request (and its Secondary Requests, if it is a Primary Request) is locked or not. If it is locked and the current logon user is not the locking user and is not 'SCASYS', an error message 'Request xxx is locked by xxx, and cannot be updated' is displayed (As shown), and the Task is not allowed be completed. No update is performed.



*An error message for updating a locked Request by a Task*

## Multiple Completion of Requests

The Multiple Completion of Requests batch function will now check if a Request is locked or not during the update processing. A warning message is included in the completion email if some Requests could not be updated because they were locked (regardless of who locked it).

## Responsible Officer Reassignment

The Responsible Officer Reassignment batch function will now check if a Request is locked or not during the update processing. A warning message is included in the completion email if some Requests could not be updated because they were locked (regardless of who locked it). A message: 'Request xxx is locked and cannot be updated' will be printed on the message log when a locked Request is encountered.

## Automatic Priority Escalation

The Automatic Priority Escalation batch function will now check if a Request is locked or not during the escalation processing.

There will be a warning in the completion email if some Requests could not be escalated because they were locked.

The message 'Request xxx is locked and cannot be updated' will be printed in the message log when a locked Request is encountered.

When the escalation is due and a given Request is locked, it is not updated. The email for a locked Request due for escalation will mention that another attempt will be made to escalate the Request when Automatic Priority Escalation is next run.

**Background Request Escalation**

The Background Request Escalation function will now check if a Request is locked or not during the escalation processing.

When an escalation is due and a given Request is locked, it will not be updated. The email for a locked Request due for escalation will mention that another attempt will be made to escalate the Request in 30 minutes.

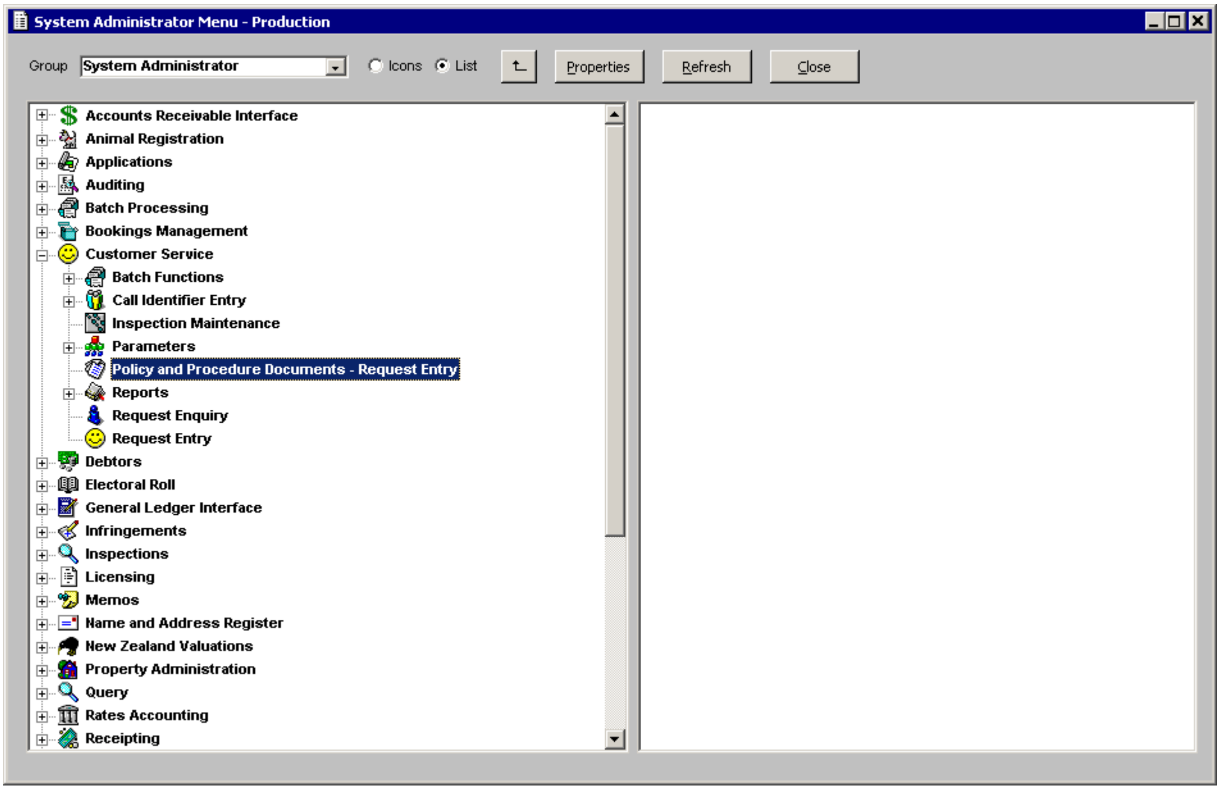
**Pressing the F3 key to exit to menu**

If the F3 key is selected during maintenance of a Request to return to perform a fast exit to the main menu, the lock on the Request will be released.

# Request Entry/Maintenance/Enquiry

Requests may be entered and maintained via the Request Entry option on the Customer Service menu. However, an alternative approach is available, namely, ‘Policy & Procedure Documents – Request Entry’. This menu option can be placed on appropriate user menus if required by Council to allow Customer service Operators to access Policy & Procedure Documents and create Requests from here and the Policy & Procedure Document form is required as the first screen.

**Note:** It is recommended that only one option is provided to Customer Service Operators. Providing both options may cause confusion for the user.



*Customer Service menu options showing alternative Request Entry option*

**Ability to place Requests in an On Hold State**
An enhancement was requested to be able to allow Requests to be placed in an On Hold state (available in Release 3.07 if licensed for the authorised function ‘On Hold Status Codes’).

When a Request’s Status is set to an On Hold Status (Completion Status = ‘Hold’), a new field, ‘Hold Activation Date’, will appear on the Request Enquiry and Request Maintenance forms.

After the On Hold period have completed, the Request’s Status will be automatically change to the On Hold Pending Status (Completion Status = ‘No’). A new field ‘Hold Completion Date’ will appear on the Request Enquiry and Request Maintenance forms.

The Thick Client lacks the screen real estate to show the same details as the Smart Client. As such the existing Completion Date field is now used to display one of 3 potential values:

| FIELD NAME(S) | DESCRIPTION |
|---|---|
| Completion Date | The Date upon which the Request was set to a Complete status.<br>Only shown if Request is currently Complete (and thus shows the date upon which this occurred) or if the Request has never been On Hold (in which case it will be blank). |
| Hold Activation Date | The date the Request was placed On Hold. |

| | |
|---|---|
| | Only shown if the Request is presently On Hold. |
| Hold Completion Date | The date the Request was last taken Off Hold.<br>Only shown if the Request is presently Incomplete, but has previously been On Hold. |

For more information on this topic please refer to the section titled 'On Hold Status Maintenance'.

## Request Search Profile

The Request Search Profile form is used to search for specific Customer Requests. In Enquiry Mode the User may only view the specific Customer Request, but may not modify any of the details on the Request.

If only a single record matches the search criteria entered the user will be presented with the Request Maintenance form.

If more than one record matches the search criteria the user will be presented with the Request Selection form from which to make their selection.

In addition, the user is able to select a Property Ward as an option at the Request details level. This allows the user to search, for example, for Animal Requests within a given Ward for a specific Animal Type by Breed.

Set up a default Retrieve Search Profile that will be entered automatically for you when opening this form. (Search Menu, Save) e.g. if you consistently use a profile of your user name as the Responsible Officer and a Status of Unactioned enter the appropriate fields and select Search from the Menu and then Save Search Profile as Favourite. Give the search profile a name e.g. "My default" and check the default box to on. Only one search profile may be nominated as the default.

Searching may be conducted using a combination of Request details and additional search profile details from other supported modules as well as References and Query results.

This means that it is possible to enter Request details, and click on one of the displayed Search Option buttons. If required, it is also possible to select a specific Role Type from the associated drop down boxes which will limit the search to that particular Role Type for that application Module. Note that not all related application Modules support the use of Role Types, and the 'Names' module does not support searching over 'All' Role Types.

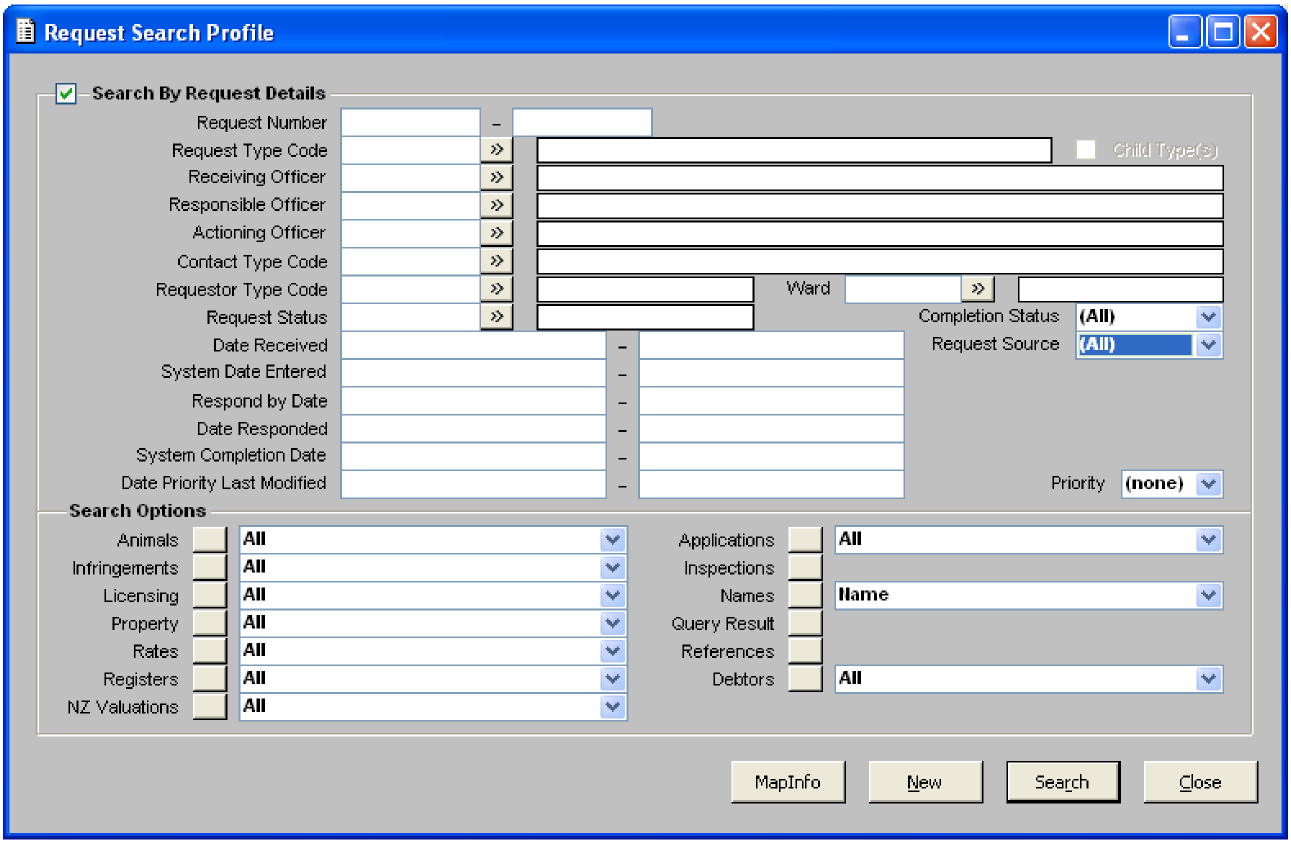
Note: The Query option will only appear if the authorised function "Documents and Query Search" for application 'LPA' is enabled. If customers do not have this option and require the ability to use Query for searching from Customer Service then it is advisable that they contact their account manager to organise the purchase of this function.

Having clicked on a Search Option you will be shown the Search Profile form for that application Module. On this form you may enter further profile details for that application, and click 'Search' on that form.

The search will then be performed and will select Customer Service Requests that meet both the Customer Service Search Profile, and have links to the related application Module that also meet the Search Profile details for that Module.

As an option, it is also possible to uncheck the 'Search by Request Type Details' check box, and perform a search based on the related application Module details only.

The results of these searches will be displayed on a 'combined' Selection Form. These combined Selection Forms display the items from the related application Module on the left, and the matching Customer Service Requests on the right of the form.



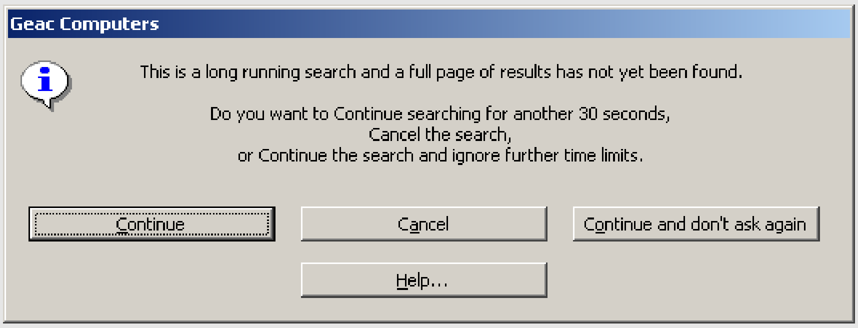

*Request Search Profile Form*

***NOTE: PERFORMANCE ISSUES IN CROSS MODULE SEARCHES***

*One significant issue that may arise when performing Cross Module Searching, is the amount of time that may be required to complete the search. This can be a particular problem on large databases where the combination of the Customer Service Search Profile and the application Module Search Profile result in a small number of 'hits' from a large number of records.*

*To assist users with this potential problem, the Search processes have been enhanced with a new 'Maximum Search Time' limit. The search time limit is specified at a system level by your administrator. The default value is  seconds.*

*When running one of these searches, if the time that the search has been executing, without displaying any results, exceeds the specified value then the user will be shown the following Information dialog message.*




*Message Dialog shown for long running searches.*

*This message dialog gives the user an opportunity to escape from a long running search. You may select to continue the search for another period of time, to cancel the search and return to the previous Search Profile form, or to continue the search regardless of how long the search may take. This final option is the equivalent of the previous behaviour for this type of search.*

*The Modules which have this limiting function included are:*
*Animal Registration*

*Applications/Licensing*
*Infringements*
*Names*
*Property Administration*
*Rates Accounting*
*References*
*Registers*

**Search By Request Details**
Check this flag is you wish to search by request details. All criteria entered in this area will be considered in the search (with the exception of the request number if entered).

**Request Number**

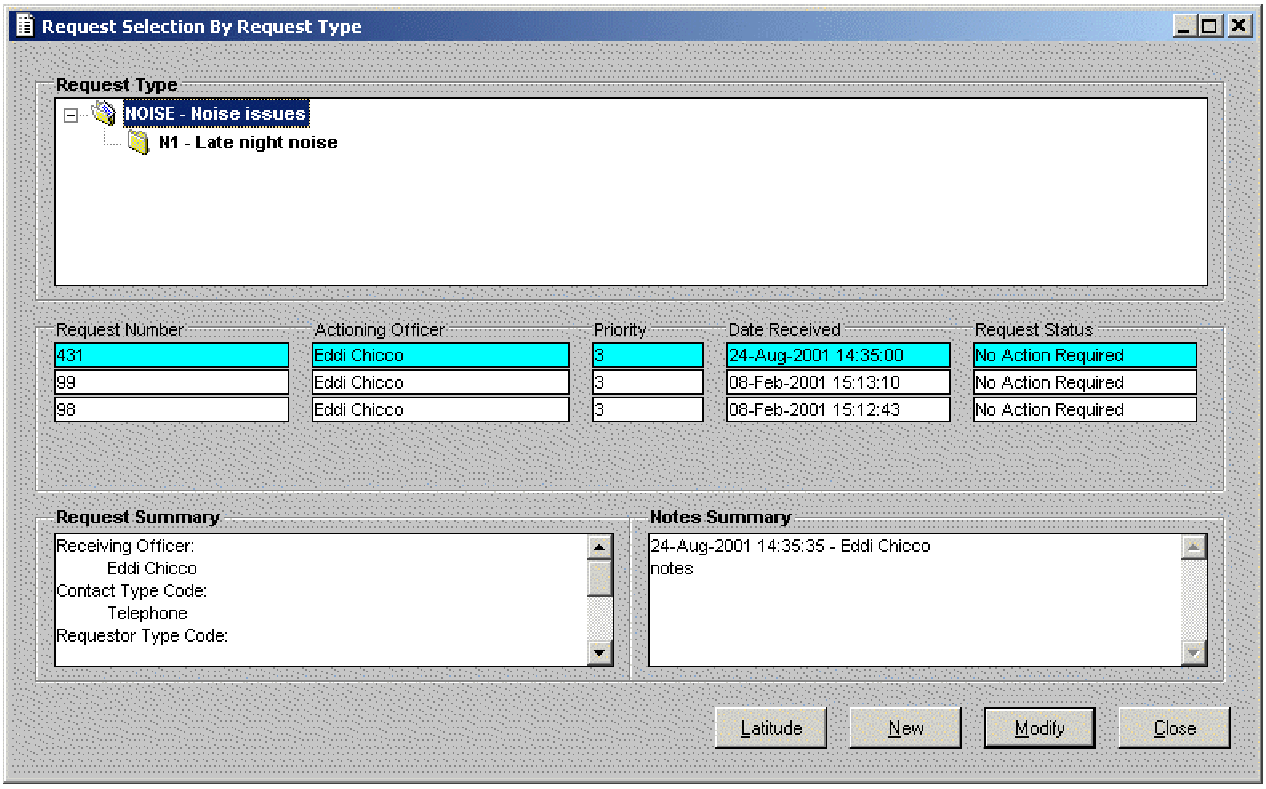
A Request Number range, if known, may be keyed into this field and then the Search Button selected to begin a search.

**Request Type Code**

A Request Type, if known, may be keyed into this field as part of the search criteria. The Pop Up Button may be selected to display the pre-defined list of Request Types. Once the Code is selected, the full description of the Request Type will be displayed.

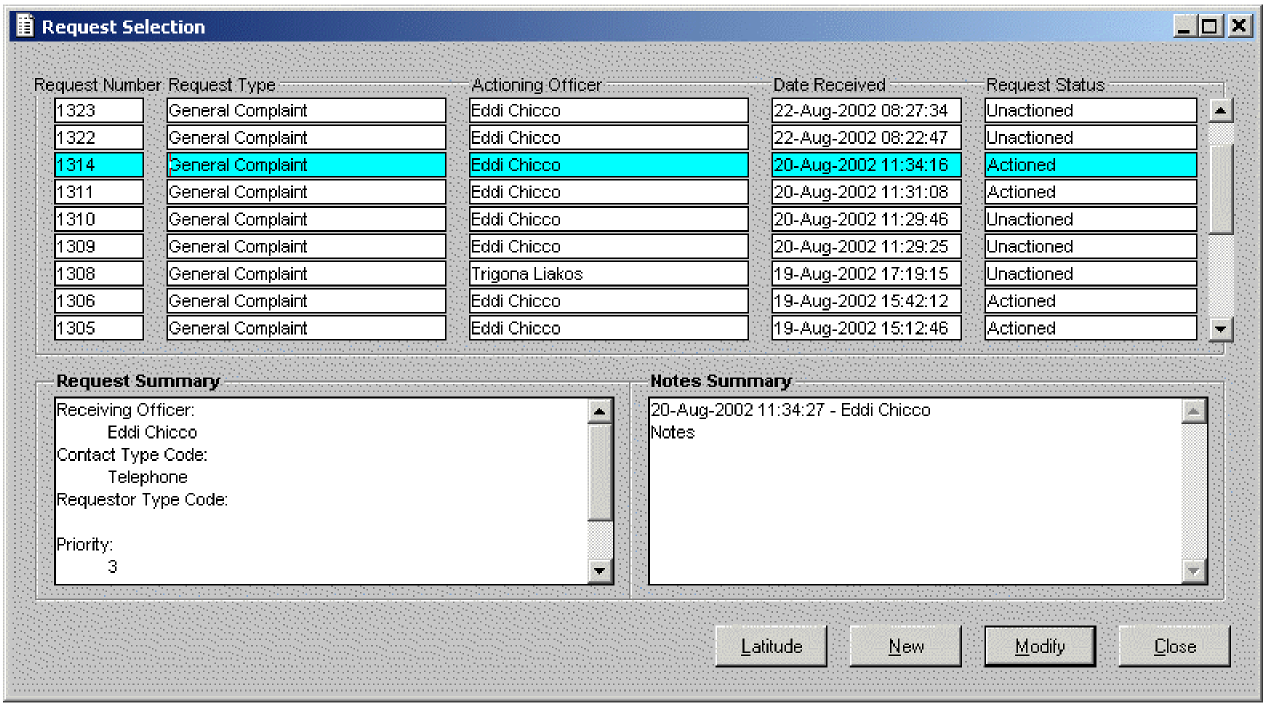
**Note:** If the Pop Up button is selected when this form has been invoked via the 'New' button on the Inspections Search Profile form, then the Inspection Request Type Pop Up form will display listing only those Request Types that have valid Inspection parameters defined.

**Child Type(s)**
This flag will become available once the Request Type is entered on the Search Profile form. If this flag is checked ON, then when a search is performed the Request Selection by Request Type form will display listing any Child Request Types beneath the Parent Type in an expandable hierarchy. Requests associated with a respective Request Type can be displayed in the middle pane by focusing on the Request Type, e.g.



*Request Selection by Request Type form which displays when Child Type(s) checkbox is ON*

If this checkbox is checked OFF, then when a search is performed the Request Selection form will display, e.g.



*Request Selection form which displays when Child Type(s) is checked OFF.*

### Receiving Officer

A Receiving Officer Code if known may be keyed into this field as part of the search criteria. The Pop Up Button may be selected to display the pre-defined list of Receiving Officers. Once the Code is selected, the full name of the Receiving Officer will be displayed.

### Responsible Officer

A Responsible Officer Code if known may be keyed into this field as part of the search criteria. The Pop Up Button may be selected to display the pre-defined list of Responsible Officer Codes. Once the Code is selected, the full name of the Responsible Officer will be displayed.

### Actioning Officer

An Actioning Officer Code if known may be keyed into this field as part of the search criteria. The Pop Up Button may be selected to display the pre-defined list of Actioning Officer Codes. Once the Code is selected, the full name of the Actioning Officer will be displayed.

### Contact Type Code

A Contact Type, if known, may be keyed into this field as part of the search criteria. The Pop Up Button may be selected to display the pre-defined list of Contact Types. Once the Code is selected, the full description of the contact type will be displayed.

### Requestor Type Code

A Requestor Type if known may be keyed into this field as part of the search criteria. The Pop Up Button may be selected to display the pre-defined list of Requestor Types. Once the Code is selected, the full description of the Requestor will be displayed.

### Ward

The user may select a Property Ward to include in the Search Profile. This allows the user to search for Animal Requests, for example, within a given Ward for a specific Animal Type, by Breed.

### Request Status

A Request Status, if known, may be keyed into this field as part of the search criteria. The Pop Up Button may be selected to display the pre-defined list of Request Statuses. Once the Code is selected, the full description of the Status will be displayed. If the Request Status is not to be considered then this field should be left blank. Request Statuses can be set up within parameters.

The following functionality for the Request Status applies when a 'Request Type Code' is nominated on this form.

If the Authorised Function 'Status Codes at Request Type Level' is authorised

- If one or more Status Codes has been assigned to the Request Type, then only those Status Codes that have been assigned to the Request Type will be valid and will display in the Pop Up form.
- (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes will be valid /displayed in the Pop Up form)

Where the site does not have authority to the new functionality

- Existing functionality will apply – i.e. all Status Codes will be valid / displayed in the Pop Up form)

**Completion Status**

The Customer Request Search Profile form allows searches to be filtered by Completion Status, allowing the user to optionally limit displayed Requests to those that are Completed, Incomplete and/or On Hold. This functionality has been included in all of the Search Options on the Customer Request Search Profile that support the filtering of selections based on details entered.

When a Completion Status of 'Complete' or 'Incomplete' are selected, the Request Status field will be dimmed and unavailable. Conversely, when a single Request Status (e.g. UNACTIONED) is selected for the search profile, the Completion Status field will be dimmed and unavailable.

**Request Source**

The Customer Request Search Profile form allows searches to be filtered by Request Source, allowing the user to optionally limit displayed Requests to those either created via Pathway, ePathway, Mobile Computing or (All).

**Date Received**

The user may select a date range to search for Requests within the Date Received Range. Enter a "from" and "to" date range.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April.

**System Date Entered**

The user may select a date range to search for Requests within the System Date Entered range. Enter a "from" and "to" range. This field is the date that the Request was entered into the system.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April.

**Respond By Date**

The user may select a date range to search for Requests within the Respond By Date range. Enter a "from" and "to" range. This field is the date that the Request is due to be actioned by.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April.

**Date Responded**

The user may select a date range to search for Requests within the Date Responded Range. Enter a "from" and “to” range. This field is the date that the Request was actioned.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered in the “from” and “to” fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April.

**System Completion Date**

The user may select a date range to search for Requests within the System Completion Date range. Enter a “from” and “to” range. This field is the date that the Request was completed in the system.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered in the “from” and “to” fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April.

**Date Priority Last Modified**

The user may select a date range to search for Requests within the Date Priority Last Modified Range. Enter a “from” and “to” range. This field is the date that the Request was actioned.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered in the “from” and “to” fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April.

**Priority**

Selecting from-1 –5 will limit the search to those requests with a matching Priority.

**Search Options**

The Customer Service Search Profile form now includes a set of ‘Option Buttons’ to provide access to the Search Profile forms for each of the following application Modules:

- Animals
- Applications
- Infringements
- Inspections
- Licensing
- Names
- Property
- Rates
- References
- Registers
- Debtors
- New Zealand Valuations

It is now possible to enter details in the ‘Search by Request Details’ section and then click on one of the displayed Search Option buttons. If required, it is also possible to select a specific Role Type from the associated drop down boxes which will limit the search to that particular Role Type for that module. Note that not all related modules support the use of Role Types, and the ‘Names’ module does not support searching over ‘All’ Role Types.

Additionally, a Customer Service Search Profile may also be applied to the results of a Customer Service ‘Query’ result set.

Note that the availability of the Option Buttons will depend upon the availability of the Modules in question. E.g.: For the Inspections option button to be displayed you must have both the ‘Inspections Maintenance’ authorised function, and the additional ‘Inspection Linkages’ authorised function installed.

Having clicked on a Search Option you will be shown the Search Profile form for that application Module. On this form you may enter further profile details for that application, and click ‘Search’ on that form.

The search will then be performed and will select Customer Service Requests that meet both the Customer Service Search Profile, and have links to the related application Module that also meet the Search Profile details for that Module.

As an option, it is also possible to uncheck the ‘Search by Request Type Details’ check box, and perform a search based on the related application Module details only.

The results of these searches will be displayed on a ‘combined’ Selection Form. These combined Selection Forms display the items from the related application Module on the left, and the matching Customer Service Requests on the right of the form. There are many of these forms, depending on the application Module involved.

When using these ‘Combined’ Selection forms, any actions taken will apply to the right hand items, i.e. Customer Service Requests. The Modify button, and in Select Mode the Select Button, will process the highlighted Requests. The ‘GIS’ button, if available, will prompt for a Property Role Type for the Customer Service Requests and will then show any Property Parcel information linked to the highlighted Requests for the selected Role Type.

**Animals Searching**

When the ‘Animals’ option button is selected, the Animal Search Profile form will display to allow the operator to enter selection details. Note that the final result will be filtered not only by the Animal selection criteria, but if ‘Select using Request Details’ is also selected then any search criteria entered in the fields of this section will also be used to perform the search.

Note: The only buttons for ‘Additional Search Options’ available on the Animal Search Profile are Names and References.

This functionality will allow users to search all Requests for an Animal of a particular Breed, Status or Registration Class etc. In effect the search criteria are used in combination.

**Applications Searching**

When the ‘Applications’ option button is selected, the Class Selection form displays to allow the operator to select a class. Subsequently, the Applications Search profile form displays to allow the operator to enter selection details. Note that the final result will be filtered not only by Application selection criteria, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

**Infringements Searching**

When the ‘Infringements’ option button is selected, the Infringement Type Selection form displays to allow the operator to select an Infringement Type. Subsequently, the Animal Infringements Search Profile form displays to allow the operator to enter selection details. Note that the final result will be filtered not only by Infringement selection criteria, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

**Licensing Searching**

When the ‘Licensing’ option button is selected, the Class Selection form displays to allow the operator to select a class. Subsequently, the Licensing Search Profile form displays to allow the operator to enter selection details. Note that the final result will be filtered not only by Licensing selection criteria, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

**Name Searching**

When the ‘Names’ option button is selected, the Owner – Search Profile form displays to allow the operator to enter name selection criteria. Note that the final result will be filtered not only by Name selection criteria, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

**Property Searching**

When the ‘Property’ option button is selected, the Address Search Profile form displays to allow the operator to enter selection details. Note that the final result will be filtered not only by Property selection criteria, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

Note: The only buttons for ‘Additional Search Options’ available on this form are Names and References.

**Query Searching**

Search by Query is a new option. It is a secured function. When the ‘Query’ button is selected the Query Search form displays to allow the operator to select a Customer Service query result via the Query Result Selection form accessed via the Pop Up button. Note that the final result will be filtered not only by the query result, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

**Rates Searching**

When the ‘Rates’ option button is selected, the Assessment Search Profile form displays to allow the operator to enter selection details. Note that the final result will be filtered not only by Rates selection criteria, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

**Reference Searching**

When the ‘References’ option button is selected, the References Search Profile form displays to allow the operator to enter selection details. Note that the final result will be filtered not only by Reference selection criteria, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

**Registers Searching**

When the ‘Registers’ option button is selected, the Register Pop Up form displays to allow the operator to select a Register Code. Subsequently, the Register Entry Search Profile form displays to allow the operator to enter selection details. Note that the final result will be filtered not only by Register selection criteria, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

**Debtors Searching**

When the ‘Debtors’ option button is selected, the Debtor Search Profile displays to allow the operator to select a Debtor Number. Subsequently, the Request Selection by Debtor Number form displays to allow the operator to select a record. Note that the final result will be filtered not only by Debtor selection criteria, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

**New Zealand Valuations Searching**

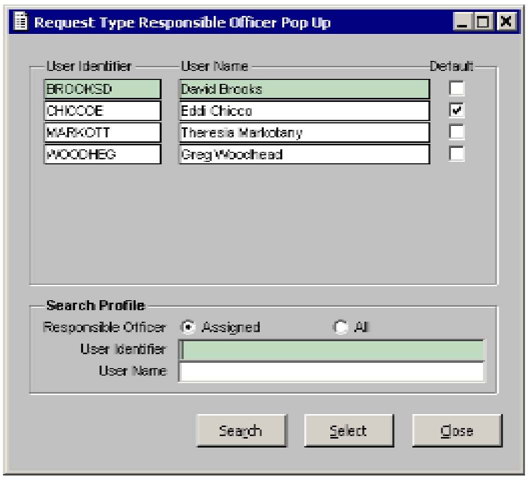
When the ‘NZ Valuations’ option button is selected, the Valuation Assessment Search Profile form displays to allow the operator to search for an Assessment. Subsequently, the Request by NZ Valuation Selection form displays listing all the records that match the search criteria. Note that the final result will be filtered not only by NZ Valuation selection criteria, but if ‘Select using Request Details’ is selected then any search criteria entered in the fields of this option will also be used to perform the search.

**Gis Interface Button**

Selection of this button will invoke the GIS Interface. This button will only display if the user has the appropriate authority.

## Request Type Responsible Officer Pop Up Form

The Request Type Responsible Officer Pop Up allows the selection of a User for the Responsible Officer field. Users are established in User Maintenance, which is accessible via System Administration >> Menu >> User Maintenance.




*Request Type Responsible Officer Pop Up form*

**User Identifier / User Name**

These fields display a unique User Id and Description for each user of the system. This list of User Names will vary depending on whether the Responsible Officer setting in the Search Profile is set to Assigned or All. This field is display only and cannot be maintained.

**Default**

The field displays the flag against the Responsible Officer which has been set up as the Default.

**Search Profile – Responsible Officer**

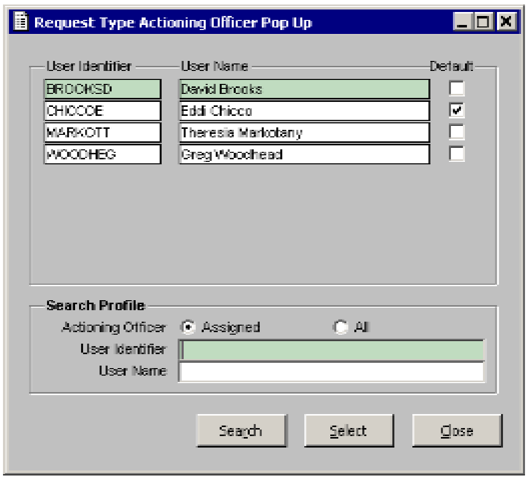
This field displays two radio buttons indicating which list of Responsible Officers is being displayed. If a Request Type with Responsible Officers set up has been entered on the Request Search Profile, then the Assigned button will be ON and the Responsible Officers displayed will be those that have been assigned to the Request Type. The user is able to switch from Assigned to All to display the full user list. If a Request Type has not been entered in the Search Profile, then these radio buttons will be dimmed.

**Search Profile - User Identifier / User Name**

Enter a User Id and/or Description on which to conduct a search. These fields are useful when there are more than 9 User records in the system. Wild card searching is available in these fields.

## Request Type Actioning Officer Pop Up Form

The Request Type Actioning Officer Pop Up allows the selection of a User for the Actioning Officer field. Users are established in User Maintenance, which is accessible via System Administration >> Menu >> User Maintenance.




*Request Type Actioning Officer Pop Up Form*

**User Identifier / User Name**

These fields display a unique User Id and Description for each user of the system. This list of User Names will vary depending on whether the Actioning Officer setting in the Search Profile is set to Assigned or All. This field is display only and cannot be maintained.

**Default**

The field displays the flag against the Responsible Officer which has been set up as the Default.

**Search Profile – Actioning Officer**

This field displays two radio buttons indicating which list of Responsible Officers is being displayed. If a Request Type with Responsible Officers set up has been entered on the Request Search Profile, then the Assigned button will be ON and the Responsible Officers displayed will be those that have been assigned to the Request Type. The user is able to switch from Assigned to All to display the full user list. If a Request Type has not been entered in the Search Profile, then these radio buttons will be dimmed.

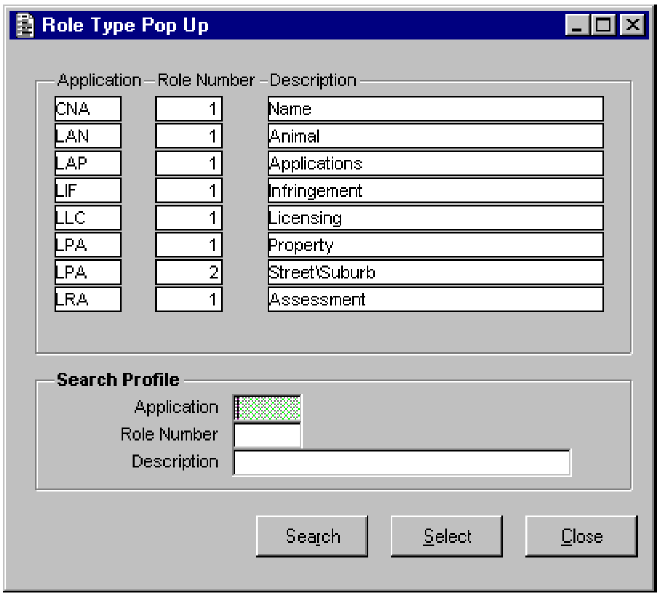
**Search Profile - User Identifier / User Name**

Enter a User Id and/or Description on which to conduct a search. These fields are useful when there are more than 9 User records in the system. Wild card searching is available in these fields.

## Role Type Pop Up Form

This Pop Up form displays all available Role Links to Customer Service.

It will display when creating a new user-defined Role Type. This form will display all the valid ‘Primary’ Role Types upon which a new User-defined Role Type can be based.




*Role Type Pop Up Form*

**Application**
This field displays the Application Code for the linked module.

**Role Number**
This field displays the Role Number for the Application.

**Description**
This field displays the Role Type Description.

**Search Profile**

Where a large number of records exist in a Pop Up form you may enter search profile details to target specific records.

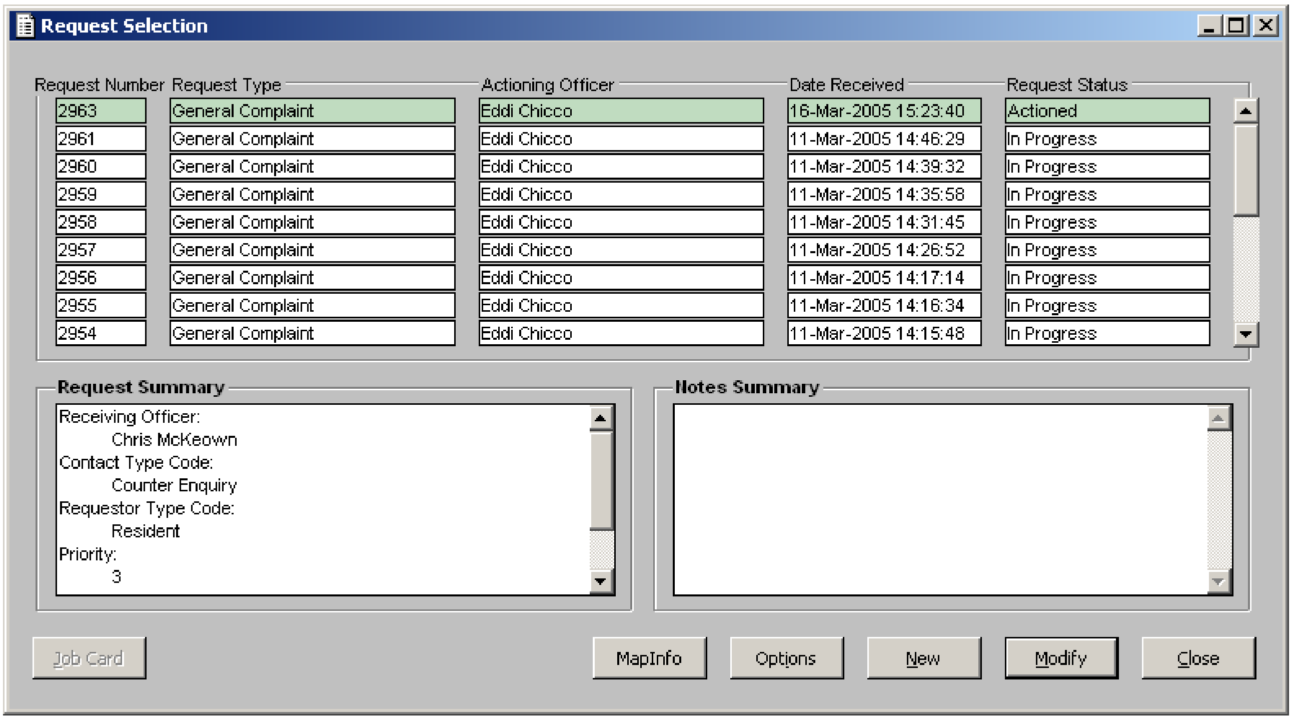
## Request Selection Form

This form will display if more than one customer request record matches your search criteria, and the Child Type(s) checkbox has not been checked.
From this form you may select a record to modify or create a new request.

Any Request which displays a lock or a key will be locked by another user , the same user in another session, or the System Administrator, and may not be available for maintenance. Refer to the section on Request Locking (148) for further details.

Note: If the user does not have access to the various “View Req Summary..” secured functions then some Summary details included on this form may not be viewable. The details will be replaced by the message “***Details Blocked***”. This function is controlled by the Authorised Function “Customer Service History Logging”.

The Options button allows the maintenance of Multiple Requests. See further details in Multi Request Maintenance.




*Request Selection Form*

**Number**
This field displays the request number.

This field is display only and may not be maintained.

**Request Type**
This field displays the full description of the request type.

This field is display only and may not be maintained.

**Actioning Officer**
This field displays the full name of the officer responsible for the request.

This field is display only and may not be maintained.

**Date Received**
This field displays the date and time the request was received.

This field is display only and may not be maintained.

**Request Status**
This field displays the status of the request.

This field is display only and may not be maintained.

**Request Summary**
This field displays main request details from the request that is selected in the top half of the form. Any Module and Reference Links will also be displayed. As you click on requests then this information changes.

If all the details are not visible you may use the scroll bar to move up and down the field. (Alternatively, press F2, double-click in the field or select View, Zoom from the menu, ).

This field is display only and may not be maintained.

**Notes Summary**
This field displays the notes details from the request that is selected in the top half of the form. As you click on requests then this information changes.

If all the details are not visible you may use the scroll bar to move up and down the field. (Alternatively, press F2, double-click in the field or select View, Zoom from the menu, ).

**Job Card Button**

The Job Card Button will only display if the user is authorised to the 'Print Job Card' function. Clicking this button or using the keyboard shortcut (ALT+J) begins the process of the Job Card Report for the selected Customer Service Request. Customer Service Requests are selected by using the multi-select functionality available on the Selection screen.

After clicking the 'Job Card' button the 'Processing Options' form displays to allow the user to enter a Description and gives the user the opportunity to override the default printer as well as nominating whether a header page is printed. (The header page lists all Request Numbers selected as well as giving a total number). The form also allows the user to cancel the process if required.

***Job Card Report***

The Job Card Report treats the printing of multiple Requests as a single job which ensures maximum performance in the printing process.

The numbering of pages is done in a manner that the first page in each Job Card print will be numbered 1 and then continuous numbers applied. For instance, four Requests are selected and the job will print 4 pages if no header page printed. Each page is numbered 1. If there is a secondary page for the Job Card, then the secondary page is numbered 2. Numbering is reset back to 1 for the next printed Request. If a Header page needs to be printed, the number of the Header page is always set to 1.

All Processed Jobs for the "Print Job Card" function can be reprinted or deleted by returning to the System Menu and selecting either 'Print Processed Jobs' or Delete Processed Jobs' from the Tools Menu.

Note: The Job Card Report is designed to be printed in portrait format instead of the standard landscape. The user may need to adjust their printer settings or define a new printer with portrait format settings in order to get the best effect.

When Job Cards are printed the parameters which have been set up will determine what content is printed. Job Card Parameters at the System Parameter level will be used if there are none set up at the Request Type level. If parameters have been set up at the Request Type level then these will be used instead of the System Parameters.

In addition, Child Request Types will use the parameters inherited from the Parent Request Type if parameters have not been set up for the Child Request Type.

See further details in Job Card Parameter Maintenance.

**GIS Interface Button**

Selection of this button will invoke the GIS Interface. This button will only display if the user has the appropriate authority.
Options Button

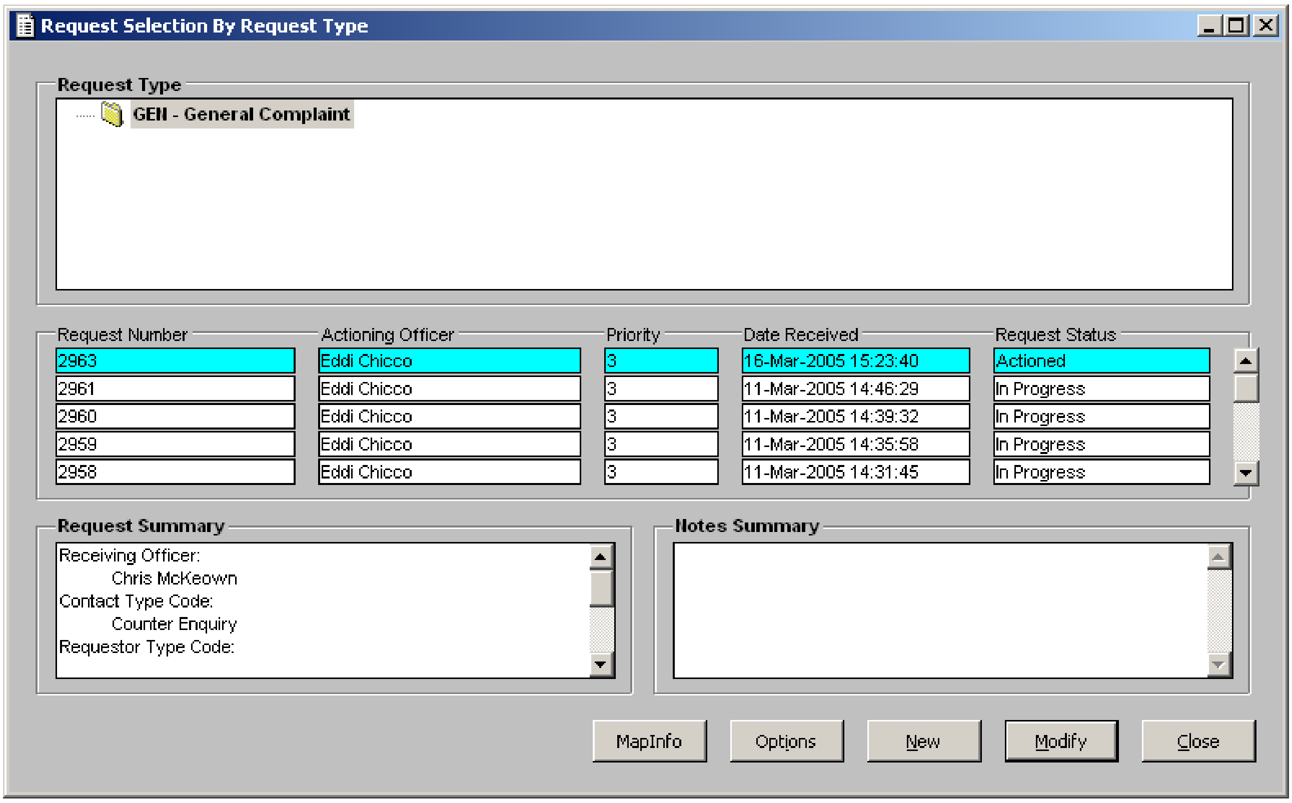
## Request Selection by Request Type Form

This form displays if you have checked the Child Type(s) flag ON in the Search Profile form. From this form you may select a record to modify or create a new Request.
This Selection form displays the Request Type initially entered in the Search Profile form, and includes any children for the Request Type as well. To view the children Request Types the user can either double click on the description of the Request Type, e.g. "DOG – Dog Complaints", or click on the [+] symbol to expand the branch.
The Requests that are displayed in the list (middle section) are refreshed each time the Request type is changed.
The ability to multi-select and maintain Requests of a single Request Type is available.
If there are no Requests linked to the Request Type that was selected on the Search Profile form then the Selection form will expand the first branch in the Request Type list.

A symbol [] is used to identify Request Types that cannot have Requests logged against them. This symbol is also used in the Request Type Pop Up. This allows users to quickly identify those Request Types that can have Requests logged against them and those that cannot.

Any Request which displays a lock or a key will be locked by another user , the same user in another session, or the System Administrator, and may not be available for maintenance. Refer to the section on Request Locking (148) for further details.

The Options button allows the maintenance of Multiple Requests. See further details in Multi Request Maintenance.



*Request Selection by Request Type Form*

**Request Type**
This field displays the Request Type(s) selected in the Search Profile. If the Child Type(s) checkbox was checked ON in the Search Profile, then any existing Child Request Types will also be listed here and can be accessed by double clicking the Parent Type or clicking the [+] alongside it.

**Request Number**
This field displays the Customer Request Number. Only those Requests matching the Request Type which has focus in the pane above will be listed here.

**Actioning Officer**
This field displays the Actioning Officer for the Request.

**Priority**
This field displays the Priority setting for the Request.

**Date Received**
This field displays the Date and Time at which the Request was created.

**Request Status**
This field displays the Request Status assigned to the Request.

**Request Summary**
This field displays main request details from the request that is selected in the middle of the form. Any Module and Reference Links will also be displayed. As you click on requests then this information changes.

If all the details are not visible you may use the scroll bar to move up and down the field. (Alternatively, press F2, double-click in the field or select View, Zoom from the menu, ).

This field is display only and may not be maintained.

**Notes Summary**

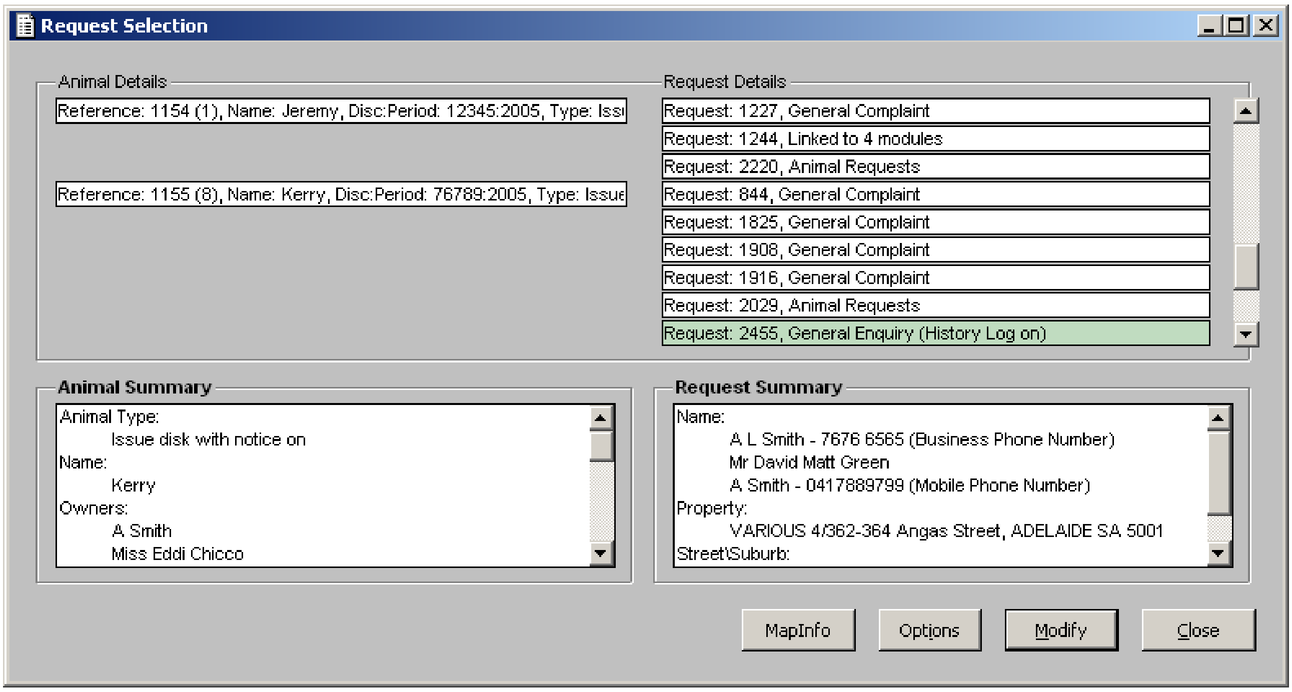
This field displays the notes details from the request that is selected in the middle of the form. As you click on requests then this information changes.

If all the details are not visible you may use the scroll bar to move up and down the field. (Alternatively, press F2, double-click in the field or select View, Zoom from the menu, ).

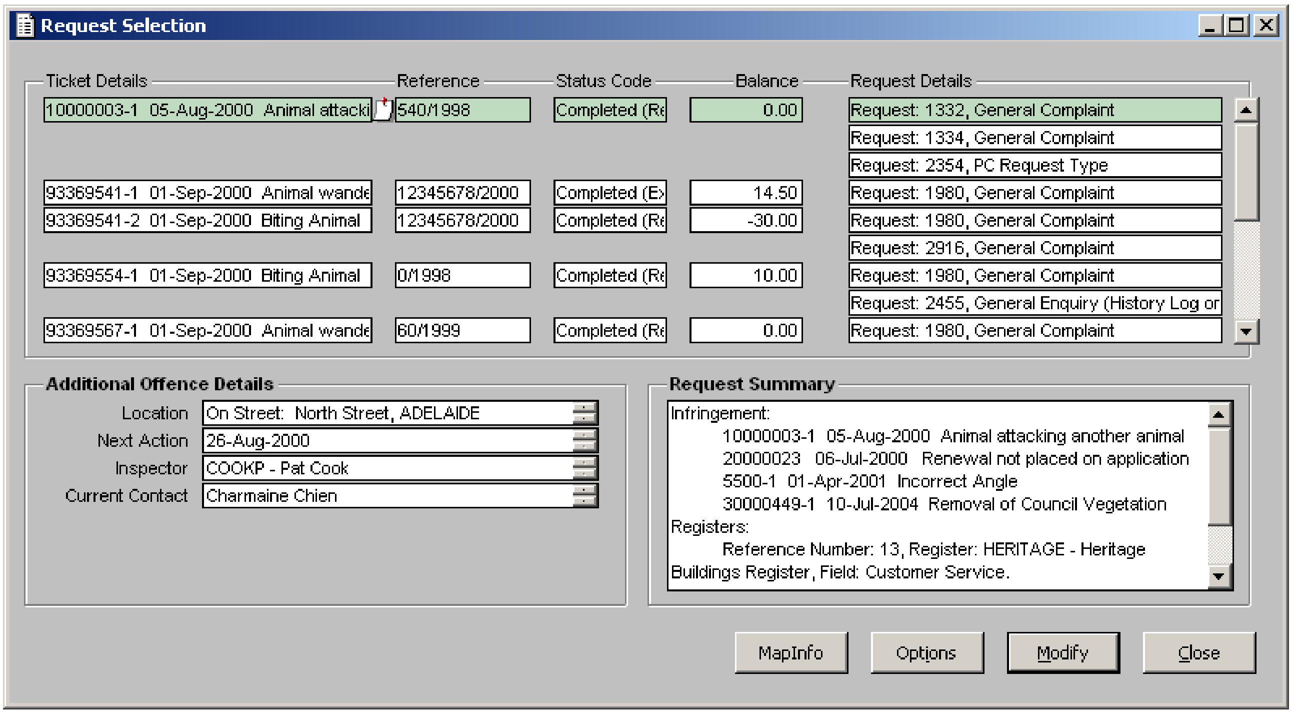
## Combined Selection Forms

Conducting Customer Request Searches using Request Details combined with other Search Options displays the results in a ‘combined’ Selection form. The following Selection Forms will display depending on which module Search button is selected to be used in combination with Request details:

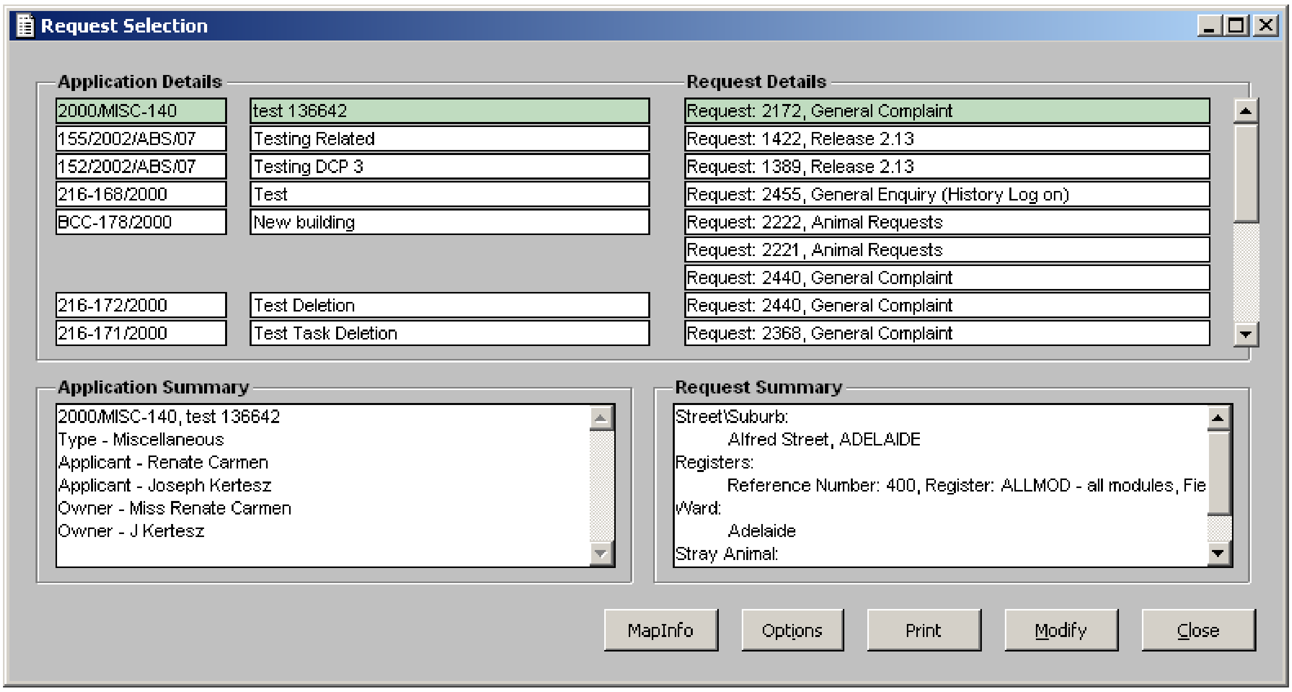
The Options button allows the maintenance of Multiple Requests. See further details in Multi Request Maintenance.



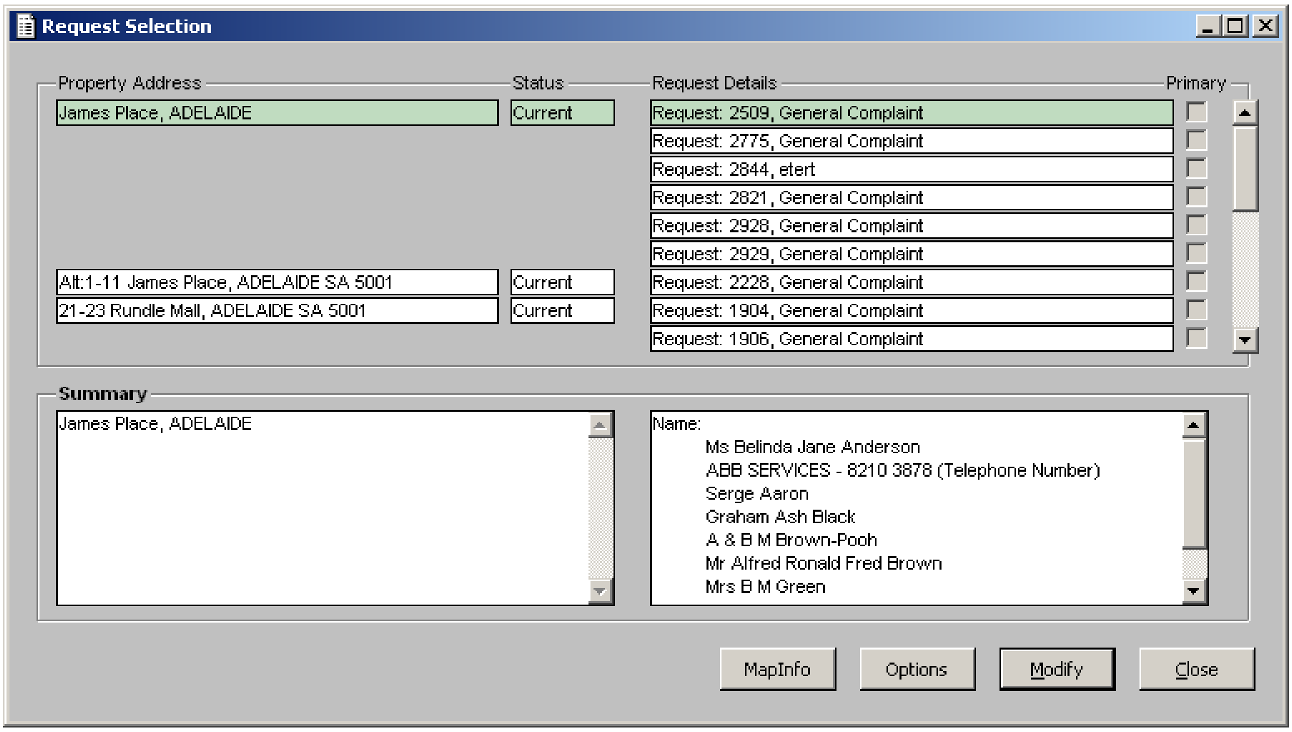

*Request Selection (Animals)*



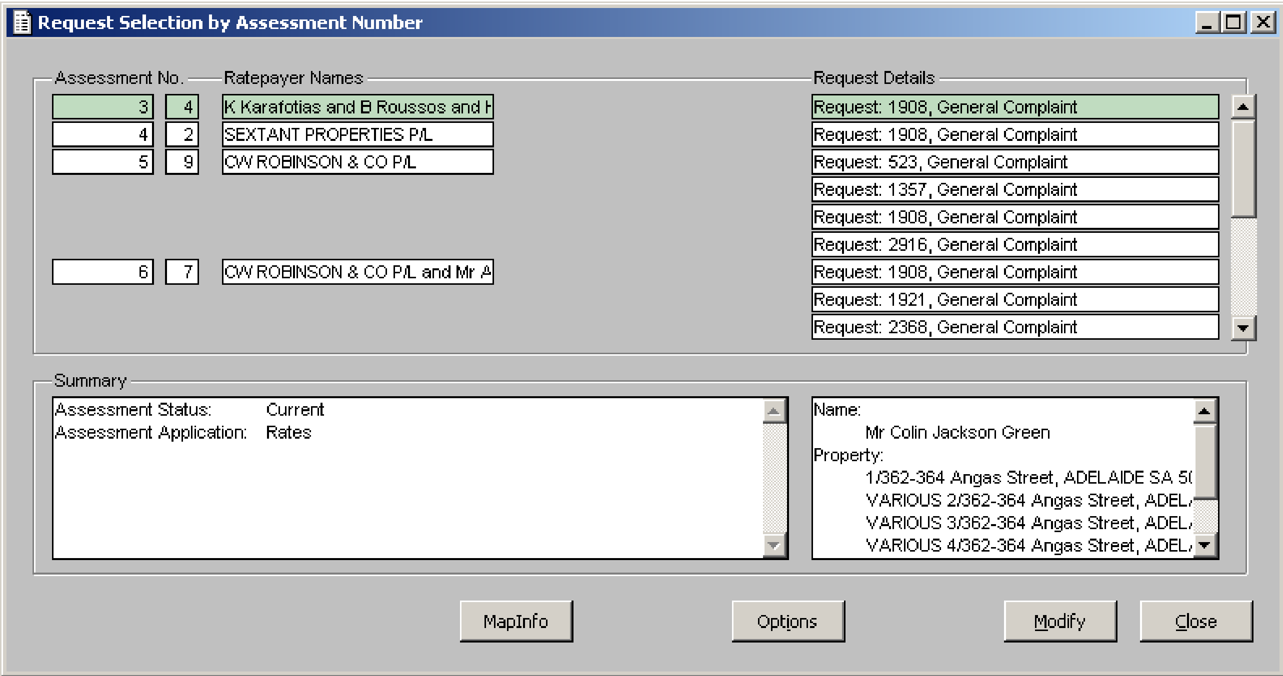

*Request Selection (Infringements)*



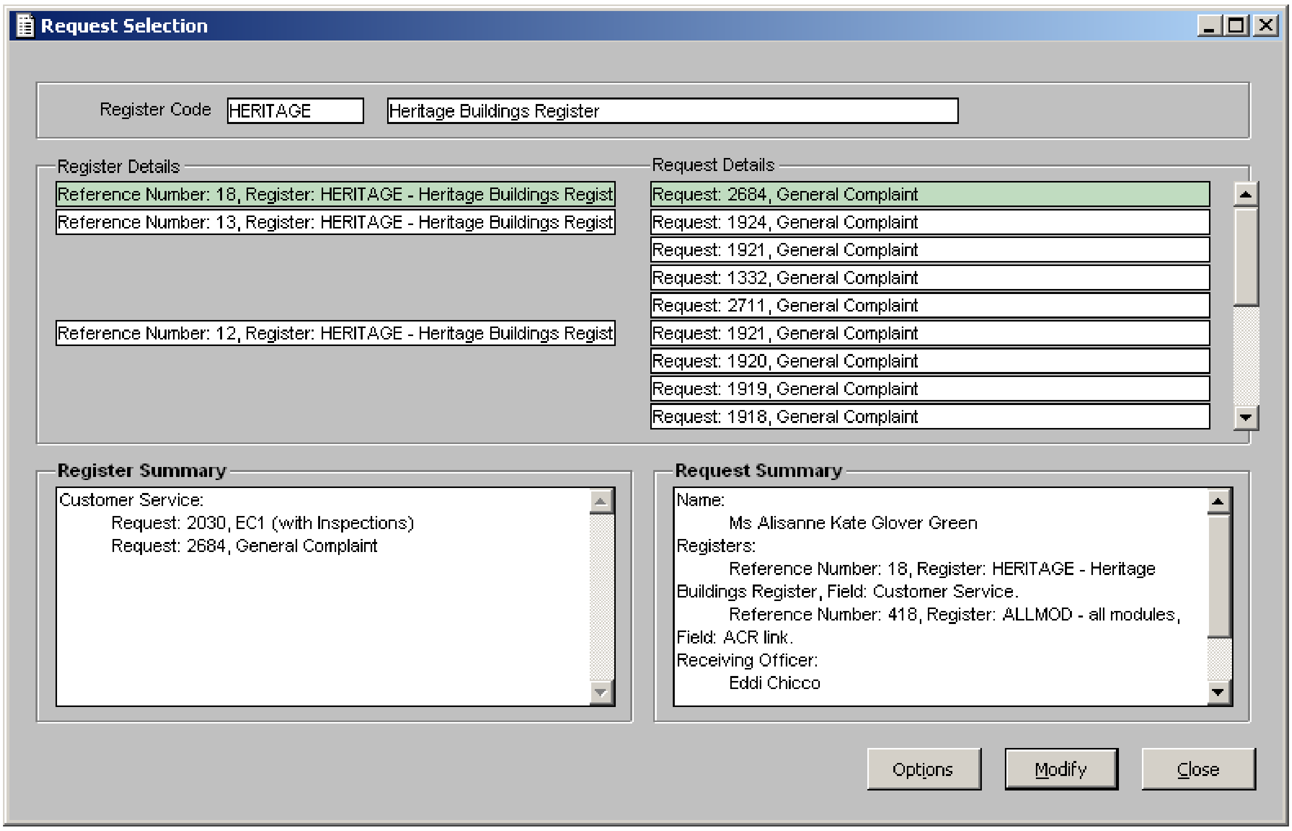

*Request Selection (Licensing / Applications)*



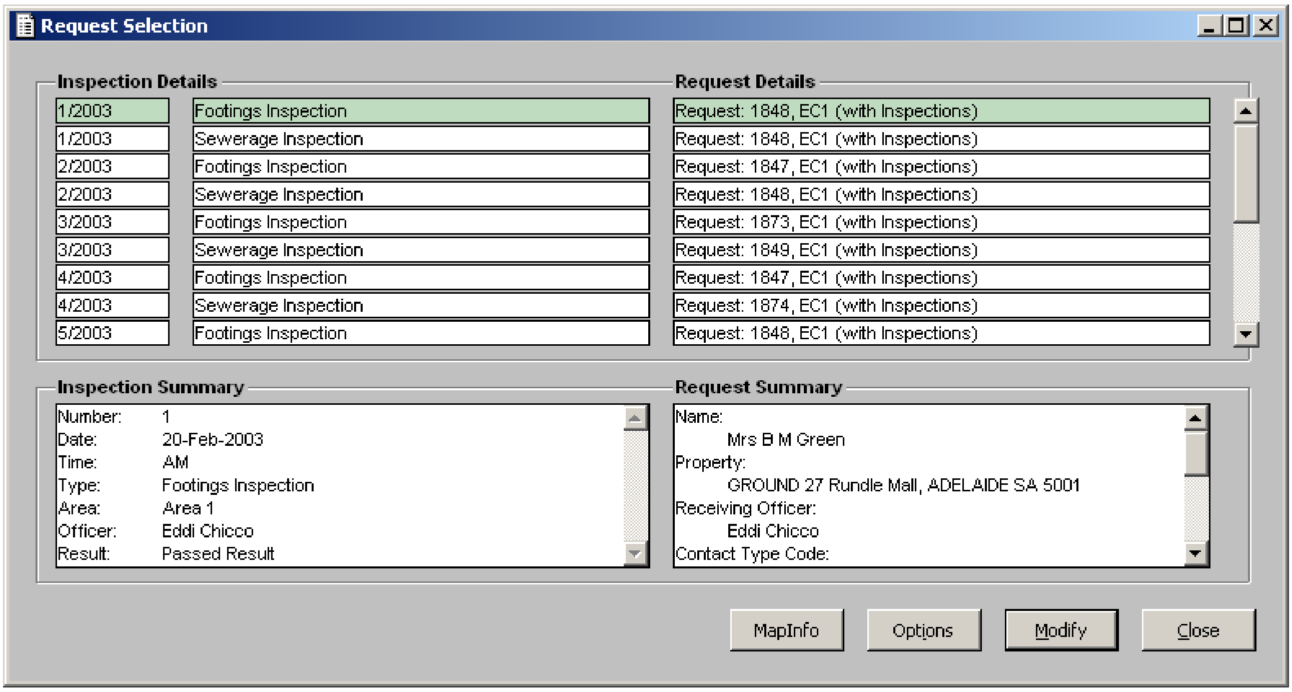

*Request Selection (Property)*



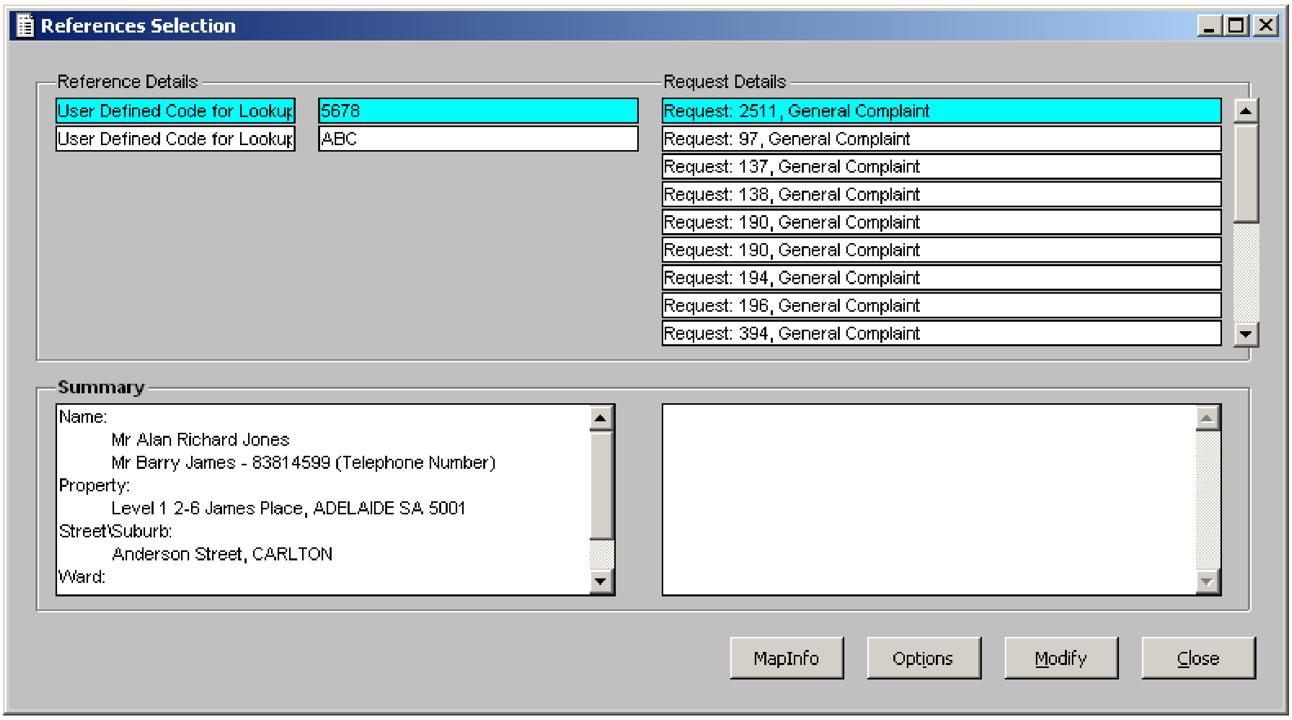

*Request Selection by Assessment Number (Rates)*



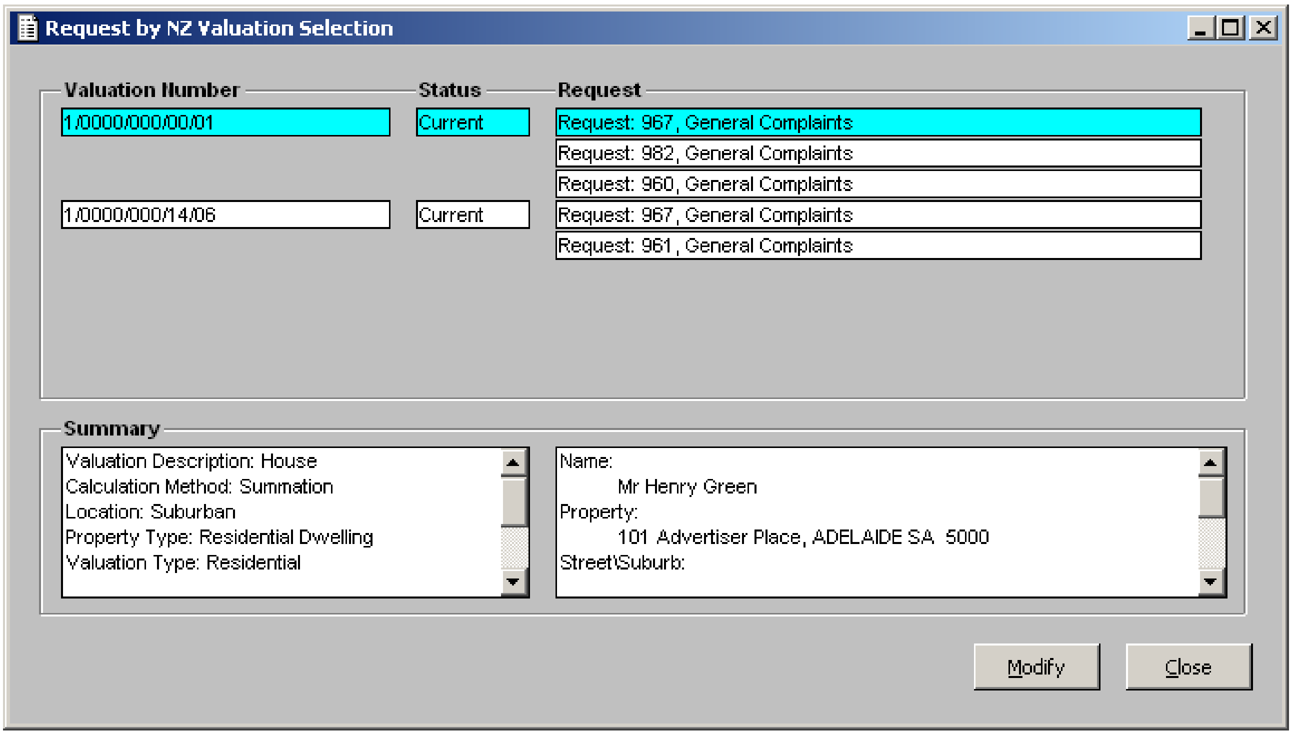

*Request Selection (Registers)*



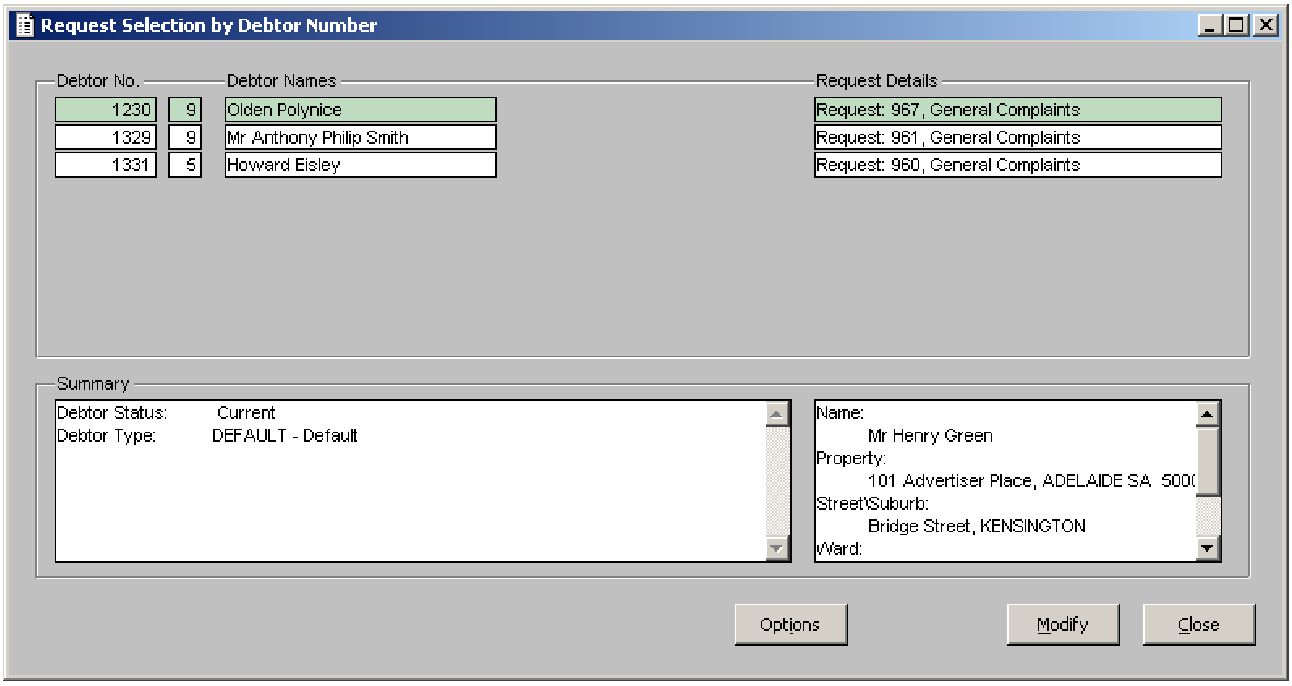

*Request Selection (Inspections)*




*Request Selection (References)*



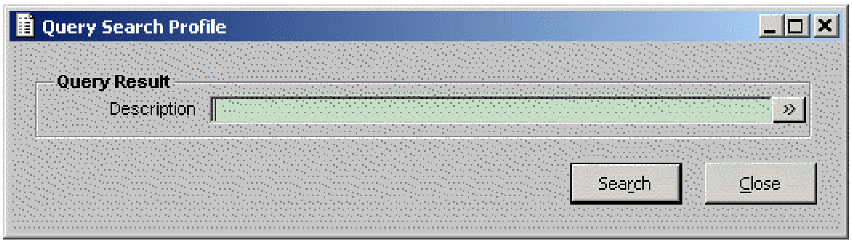

*Request by NZ Valuation Selection form*



*Request Selection by Debtor Number form*

## Query Result Search Profile

The Query Result Search Profile form displays when the Query Result Search Option button is selected in Customer Service Search Profile. It allows the user to search for a Query Result to use as part of the search profile to use in retrieving related Requests.



*Query Result Search Profile form*

**Query Result Description**

Enter a valid Query Result Description or select one from the Pop Up. Selecting the Search button displays the Request Selection form displaying the records which are included in the Query Result.

## Request Maintenance Form

The Request Maintenance Form is the main form that is used for creating Customer Requests. The form has some mandatory fields, others may be filled in at a later date.

This form is retitled to ‘Request Entry’ whenever a new Request is being added, in order to remove ambiguity for the user as to whether they are entering a new Request of maintaining an existing one.

Note: The Hot Link Menu is available from Request Entry and does not require that all mandatory links on the form be completed prior to accessing it. (The Hot Link Menu, if set up in parameters, is accessed by right-clicking on the form).

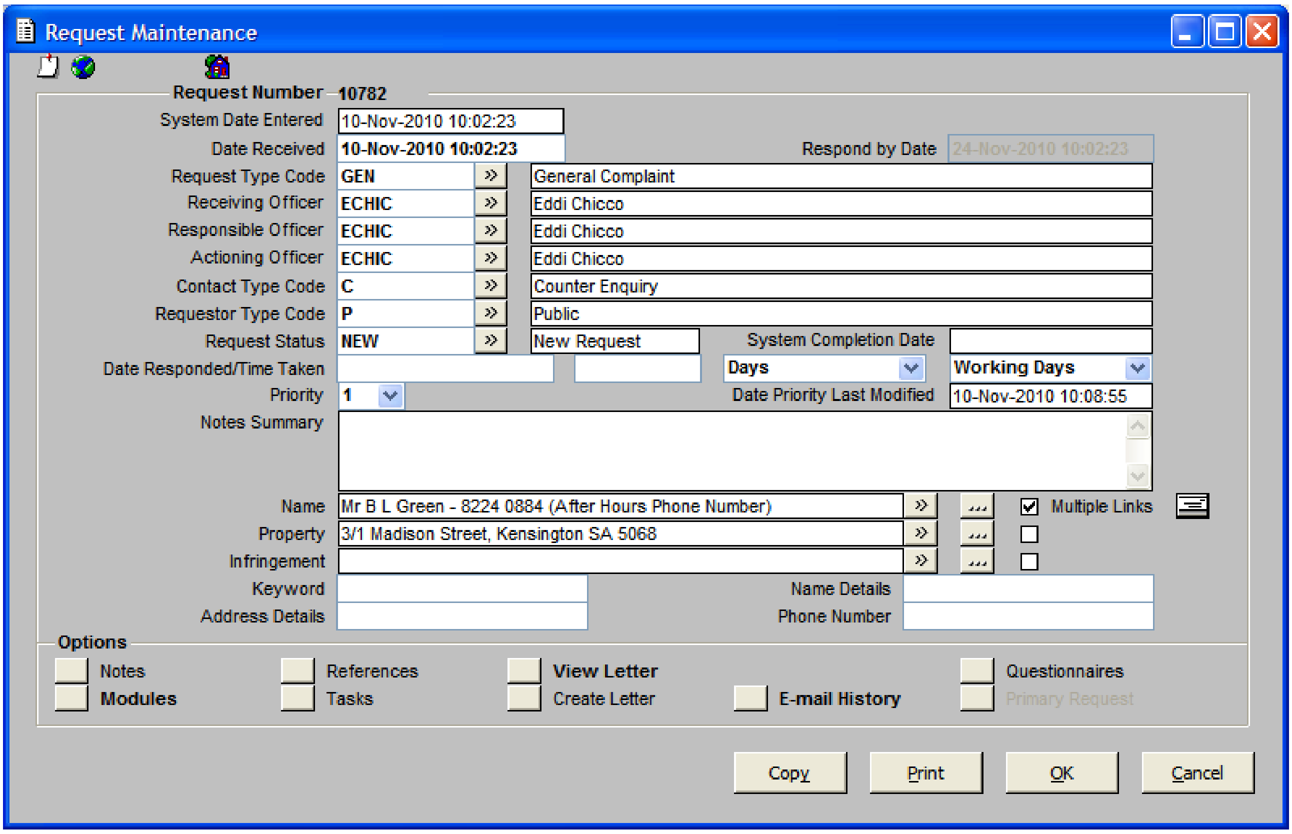
Note: If the user does not have access to the various "View Request Summary.." secured functions then some details included on this form may not be viewable. The details will be replaced by the message "***Details Blocked***". Any Reference fields which appear on this form will not be blocked from view. This function is controlled by the Authorised Function "Customer Service History Logging".

**Module Links**

Up to three Module Links may be specified to display on the Request Entry form. This allows for faster processing as the user does not need to click on the Modules button first. See details under Role Link Type.

**Hansen Asset Management Link**

A Witches Hat glyph will display if a Hansen Asset Management hot link is available on the Request Maintenance form. It will be red in colour if a Hansen Request has been created. See further details in the section on Hansen Asset Management System Hot Link.




*Request Maintenance Form*

**Primary and Secondary Requests**

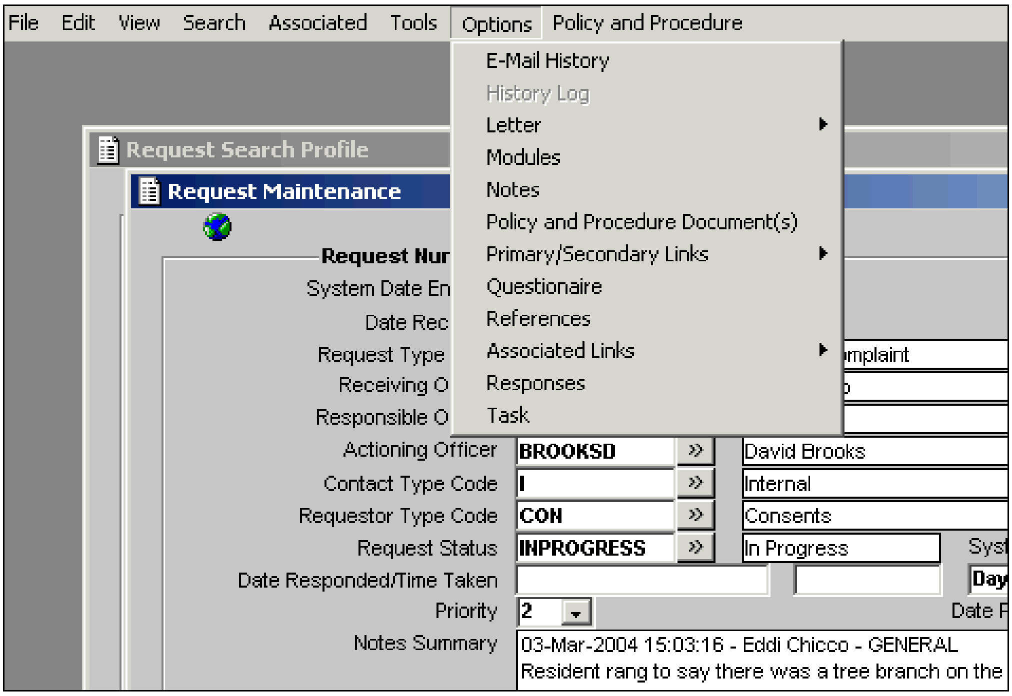
From the Request Entry form the user is able to link another Request to create a Primary or Secondary Link by selecting one of the following options from the Options / Request Link Menu:

- Create Primary Link
- Create Secondary Link

Options may be accessed via the Option buttons at the bottom of the form, or, alternatively, from the Options dropdown menu.

Secondary Requests will inherit various characteristics from the parent. If the Primary Request is completed, the Secondary Request will also be completed at the same time.

Provided that the Request is based on a Request Type where Inspection Parameters have been set up, and that the authorised function code is active, then the 'Inspections' option will be available on the Options dropdown menu on the toolbar.




*Portion of Request Entry form showing Options Menu items*

**Changing Request Type for an existing Request**

If the Request Type for an existing Request is changed after Questions for a Questionnaire have been answered, a Note is created containing details of the answered Questions. The details output to the Note include the Questionnaire to which the Questions belong.

**Questionnaire Processing for a new Request**

The Questionnaire processing that occurs when the [Ok] button is pressed for a new Request now caters for multiple Questionnaires for the Request Type.

When the [Ok] button is pressed for a new Request, it checks the 'Questionnaire Mandatory' and 'Display Questionnaire' flag settings for the Request Type.

*If 'Questionnaire Mandatory' is OFF and 'Display Questionnaire' is also OFF*

It accepts the new Request – without any Questionnaire processing.

*If 'Questionnaire Mandatory' is ON ('Display Questionnaire' is always also ON)*

If a Default Questionnaire has been nominated,

- It will present each Question for the Default Questionnaire one at a time.
- Once all Questions have been presented, it will display the Request Question Maintenance form – which will ensure that at least one of the Questions for that Questionnaire has been answered.

> NOTE: It only forces an answer to one of the Questions for the Default Questionnaire – even if there are other Questionnaires defined for the Request Type

If there is no Default Questionnaire

- It determines all 'valid' Questionnaires for the Request. This includes:-
  (a) All answered Questionnaires (regardless of Historic/Current or Active/Inactive status), plus
  (b) Any 'Current' 'Active Questionnaires with Questionnaire Code not matching any of those from point (a)

  Then, if only ONE valid Questionnaire exists
    - It will present each Question for the Questionnaire one at a time one.
    - Once all Questions have been presented, it will display the Request Question Maintenance form – which will ensure that at least one of the Questions for that Questionnaire has been answered.

  or, if MORE THAN ONE valid Questionnaire exists

- It will display the new Questionnaire Search Profile form to allow the user to select which Questionnaire must be answered

Once a Questionnaire has been selected,

- It will present each Question for the selected Questionnaire one at a time.
- Once all Questions have been presented, it will display the Request Question Maintenance form – which will ensure that at least one of the Questions for that Questionnaire has been answered.

| NOTE It only forces an answer to one of the Questions for any one of the Questionnaires. |
|---|

*If 'Questionnaire Mandatory' is OFF – but 'Display Questionnaire' is ON*
It determines all 'valid' Questionnaires for the Request
This includes:-
(a) All answered Questionnaires (regardless of Historic/Current or Active/Inactive status)
Plus
(b) Any 'Current' 'Active Questionnaires with Questionnaire Code not matching any of those from point (a)

Then, if only ONE valid Questionnaire exists

- It will present each Question for the Questionnaire one at a time – but will not force any of the Questions for that Questionnaire to be answered.
- Once all Questions have been presented, it will display the Request Question Maintenance form.

or, if MORE THAN ONE valid Questionnaire exists

- It will display the new Questionnaire Search Profile form to allow the user to select which Questionnaire will be answered

  Once a Questionnaire has been selected,

  - It will present each Question for the selected Questionnaire one at a time – but will not force any of the Questions for that Questionnaire to be answered.
  - Once all Questions have been presented, it will display the Request Question Maintenance form.

**Request Number**
The Request Number, which is located within the frame, is allocated automatically by the system.

This field is display only and may not be maintained.

**System Date Entered**
The System Date Entered field, which is a Date/Time field, is automatically populated at the same time as the Date Received with the same date and time, however, this field is not maintainable while the Date Received field is maintainable. This date/time is system-generated.

**Date Received**
When creating a new request the Date Received will be defaulted to the system date and time. This may be changed depending on the setting nominated in the Customer Service System Parameter. Initially, this field will be the same as the System Date Entered field.

**Request Source**
The Request Source field will be displayed, if the Request was created via ePathway or Mobile Computing. It will not be displayed if the record was created directly from Pathway.

**Respond By Date**
The Respond by Date is calculated based on the Priority settings of the Request Type. The Respond by Date will be calculated automatically once a Request Type has been selected. If a Calendar has been associated with the Request Type, then this calendar will be used to determine the 'Respond by Date'.

When a new Request is entered, if the Priority of the Request is changed by the Requestor Type setting or manually by the user, then the Respond by Date is automatically recalculated regardless of the user authority to maintain the 'Respond by Date'.

When a Request is being maintained and the Priority is changed by the user, the ‘Respond by Date’ is updated according to the parameter settings for the Request Type. If the Request Type is changed by the user then the Respond by Date is also recalculated based on the settings of the new Request Type. (This will only occur if the user has authority to change the Priority setting. However, if the user does not have authority to update the ‘Respond by Date’ but does have authority to change the Priority setting, then the ‘Respond by Date’ will be updated.)

The settings on the Request Type determine how this date is calculated. It is calculated based on the ‘Date Received’. If the ‘Date Received’ is changed then the ‘Respond by Date’ will also be changed accordingly, irrespective of whether the user has made a change to the ‘Respond by Date’.

The Respond by Date may be changed by the user on initial creation of the request. Once a Request has been saved, then this field may not be directly changed. However, this may be overridden if the user has been allocated the secured function at the parameter level. In this case the Respond by Date can be changed by this user.
If you are creating a Secondary Request then this field is not available for modification. The contents of the field are copied from the Primary Request

If a Request Type is a child Request Type then the child Request Type will inherit the security that is defined at the parent Request Type level.

For Example:
The following Request Type Structure exists.
DOG - Dog Reports
- DOGA - Dog Attack
  - DOGADD - Dog Attack by Dangerous Dog
  - DOGAN - Dog Attack by Normal dog
- DOGW - Dog Wandering
- DOGL - Dog Lost

The DOG Request Type will have the ability to record users who can modify the 'Respond by Date'. The users that have the authority to do this will also be able to change the 'Respond by Date' on all Request Types that are listed as children Request Types, i.e. DOGA, DOGADD, DOGAN, DOGW, DOGL.
If the Request Type is changed then the ‘Respond by Date’ will be recalculated based on the parameter settings recorded against the new Request Type.

Note: The Calendar setup which is in use by Customer Service, either at the System level or at the Request Type level, will affect the Respond by Date, e.g. if a Request is created at 8:43am and the default Priority setting has an estimated duration of 1 hour, the ‘Respond by Date’ time would be set to 9:43am unless the default Calendar specified a starting time of 9:00am. This would cause the time in the Respond by Date field to be set to 10:00am.

**Request Type Code**

The Request Type that is to be assigned to this Request should be keyed into this field. If the Code assigned to the Request type is known, simply key into the field. If the code is unknown, or if there are many Broad and Subordinate Request Types, select the Pop Up Button to display the list of Pre-defined Request Types.

If an information-only Request Type is selected (i.e. with a blue icon) an error message will display stating that ‘Requests cannot be logged against this Request Type.’

The ability to change the Request type of a Customer service Request is available under certain conditions.
The following functionality applies when **changing** a Request Type on a Customer Service Request:

- If the Request is either a Primary or a Secondary Request, the Request Type will be non-maintainable.
- The user will have the option to Cancel the change of Request Type when Tasks are linked.
- If the user has the authority, they will be given the option of whether or not to delete Started Tasks. Non-started Tasks will also be deleted if the Request Type is changed. If the user does not have the appropriate work flow authority, Tasks (Started or Non-started) will not be deleted.
- Module Links will only be kept if there is a corresponding Module on the new Request Type. If the old Module was Multiple and the new Module is Single, only the first link will be kept.
- If there is a Questionnaire with Answers linked to the Request, the details of the Questionnaire will be

copied to a Request Note and the questions and answers deleted.

- Documents will always be kept, regardless of whether there is a corresponding Merge Type on the new Request Type.

Note: Users will no longer be able to modify the Request Type of a Request that has linked Inspection records. In this case an error message will display if this is attempted. The only permissible alternative, in this case, will be to delete all Inspections on the Request, modify the Request Type as required, and then re-create the Inspection details.

**Receiving Officer**

A Receiving Officer will default to the user that is logged on. This may be changed if required. Key the code assigned to the new Receiving Officer, or select the Pop Up Button to choose from the pre-defined list.

**Responsible Officer**

Where the Request Type parameter has been established with a default Responsible Officer then the Responsible Officer will be defaulted onto the Request. If no Default Responsible Officer exists then users will be required to select a Responsible Officer when saving the Request.
The Responsible Officer may be changed at any time.
The Responsible Officer is mandatory against a Request.
No email notification will be sent to the Responsible Officer when a Request is logged or Notes are added.

**Actioning Officer**

Where the Request Type parameter has been established with a default Actioning Officer then the Actioning Officer will be defaulted onto the Request. If no Default Actioning Officer exists then users will be required to select an Actioning Officer when saving the Request.
The Actioning Officer is mandatory against a Request.
The Actioning Officer may be changed at any time.
When a new request is entered the Actioning Officer will be automatically e-mailed to say that a new request has been allocated.
If the Actioning Officer is changed then the new officer will be e-mailed to say that a request has been allocated.
If Notes are added or modified then this also initiates an email message to the Actioning Officer.

**Note**: The email which is sent to the Actioning Officer will contain a pathway.pth attachment. When this attachment is double-clicked a Uniface session will be started and the relevant Customer Service Request record will be displayed for maintenance. Once the OK or Cancel button is selected this new Pathway session will close. (This process will only start a new Uniface session if one is already running on the PC.)

**Contact Type Code**

A default Contact Type will be entered automatically by the system as per the Customer Service System Parameter setting.

The Contact Type may be changed at any time.

**Requestor Type Code**

A default Requestor Type will be entered automatically if it has been set up in System Parameters. The user may also enter a valid Requestor Code if known or alternatively press the pop up button associated with the field.

A setting in the Customer Service System Parameter will decide if the Requestor Type is mandatory.

**Request Status**

A default Request Status will be entered automatically by the system as per the Customer Service System Parameter setting when a new Request is created. Once a Request Type is entered, the Request Status set up as the default for the Request Type will default into this field. If a ‘Completed’ Status is selected, then the Date Responded and Time Taken fields will be calculated, based on the amount of time taken to complete the Request and the Calendar format, and defaulted into these fields.

An ‘Unactioned’ Status will leave a Request pending. It must be actioned at a later date.

An ‘Actioned’ Request denotes that the Request has been attended to and is completed as required. When an ‘Actioned’ Status is selected the Date Responded field and the time taken will be automatically updated. These may be changed if necessary.

If the Request Status is changed from an ‘Actioned’ to an ‘Unactioned’ Status then any values in the Date Responded and Time Taken fields will be erased automatically. (They may be re-instated manually if required)

This field is not available if you are maintaining a Secondary Request.

Further validation is made on the request if the Request Type has the Check Tasks flag turned on. If you try and make a request ‘Completed’ and there are outstanding Tasks in Work Flow a message will be displayed. The outstanding Work Flow tasks must be completed before the Request may be Actioned (or set to No Action Required).

**Rules applicable to the Authorised Function ‘Status Codes at Request Type Level’.**

When a new Request is created:-

- It initially sets the Status Code to the Default Status Code as defined in Parameters >> Request Status Maintenance.
- Once a Request Type is then entered, the Status Code is changed to the Default Status defined for the Request Type (if any).
- When the authorised function ‘Status Codes at Request Type Level’ is authorised, to ensure that the Status Code is valid for the nominated Request Type.
  - If no Default Status has been defined for the Request Type – but one or more Status Codes has been assigned to that Request Type, then the Status Code must be one of the assigned Status Codes for the Request Type
  - If no Status Codes have been assigned to the Request Type, then all Status Codes are valid.

When maintaining the Request Type for a selected Request:-

- If the Authorised Function ‘Status Codes at Request Type Level’ is authorised
  - If one or more Status Codes has been assigned to the selected Request Type, then only those Status Codes that have been assigned to the Request Type will be valid and will display in the Pop Up form.
  - (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes will be valid/displayed in the Pop Up form)
- Where the site does not have authority to the new functionality
  - Existing functionality will apply i.e. all Status Codes will be valid / displayed in the Pop Up form

NOTE: Existing Status Codes against open Customer Requests will remain until a user attempts to modify the Request Status – at which time the Status Code will be validated as per the rules outlined above.

NOTE: A red ‘M’ will be displayed next to the status description field, if a ‘Completion’ status has been entered via Mobile Computing. If the status is changed within Pathway, the letter M will be removed.

**System Completion Date**

The System Completion Date, which is a Date/Time field, will be automatically populated at the same time as the Date Responded field, however, unlike the Date Responded field, this field will not be maintainable. This date/time is system-generated.

If the status is changed from a completion status to a non-completion status the System Completion Date will reset to blank. When a Completion Date is added to the Request the System Completion Date will be defaulted to the date/time that the Completion Status was added.

**Date Responded**

This field records the date on which the customer was given a final response to the request. The date will be entered automatically if the Actioned Status is selected.
This field is not available if you are maintaining a Secondary Request.

**Time Taken**

The Time Taken field records how long the request has taken to be resolved. It will be calculated automatically by the system based on the difference between the Date Received and the Date Responded when the Actioned Status is selected.

The Time Taken field consists of two parts. The first part being the units of time and the second part being a drop down option and allows the user to select from the options of:

- None
- Minutes
- Hours
- Days
- Weeks

The Time Taken field will round up any fractions of time, e.g. 1.57 weeks will become 2 weeks.

This field is not available if you are maintaining a Secondary Request.

If the Date Responded is manually changed, the Time Taken will be adjusted after a confirmation message.

**Calendar Format**

The user is able to select between Working Days and Calendar Days using the dropdown. If Working Days is selected, then dates and time taken are calculated based on a working week which excludes weekends and public holidays. Start and Finish times will also be taken into account if the default Calendar has these parameters set up.
If the Calendar Format is changed after the completion of a Request, the Time Taken will be adjusted accordingly.

**Priority**

The Priority of the request will be defaulted based on the priority set at the Request Type level or alternatively the Priority set as an overriding priority on the Requestor Type. The 'Respond by Date' field on the Request is updated by the Priority setting according to the parameters on the Request Type.

Changing the Priority, either manually, or by changing the Request Type or Requestor Type, will have the effect of changing the Respond by Date according to the parameters set up at the Request Type level.

Note: If the Priority Escalation process is run and updates the Priority of a Request, the Respond by Date is **not** updated.

**Date Priority Last Modified**

This field displays the date the Priority was last modified. This field is display only.

When a Request is entered this date will be set to the date the Request was lodged. If a Request has the Priority maintained by a user, whether it has increased or decreased, then the date that the Priority changed will be updated. If the Priority is changed multiple times only the last date/time will be recorded.

**Notes Summary**

The Notes Summary field will display entries which the Customer Service Officer enters in the Notes Option.

This field is maintainable when adding a new Request, to enable details to be added without the need for entering the Request Notes Maintenance form to enter details. This field is not maintainable when an existing Customer Service Request is being maintained. Access to Notes, in this case, is via the Options button where additional Notes can be added.

This is described under the Notes Maintenance section. If there is more than one entry in this field, the down arrow will scroll through the selection or alternatively use the zoom feature (i.e. F2 or double clicking in the field)

**Role Link Type**

Three Module Links can be nominated to display on the Customer Service Request Maintenance form. These fields are maintainable in both Request Entry and Request Maintenance. These Module links can be sequenced by sorting them at the Request Type Parameter level. The description of these fields will vary depending on the Request Type selected and which modules have been selected to display on the Request Maintenance form.

**Example**

If the Property module has been selected for the Request Type and has been flagged as one of the modules to display on the Entry form then the label will be "Property" and the value of the field will be the property address.

To select a record (e.g. a Property Address) select the Pop Up Button associated with this field. You will be presented with the appropriate Search Profile.

**Note**: The user is also able to key directly into the module link field (where the module link is a Name, Property or Street/Suburb link) and then press Tab to activate the appropriate Search/Selection form. For example, for a Name module link field, entering "Smith, G" and selecting Tab is sufficient to initiate a search. For a Property module link field, entering "23 Abbott" and selecting the Tab key will possibly initially display the Street/Suburb Pop Up for the user to select the correct Abbott Street, and then proceed to the Property Selection form to refine the search. If only one Street/Suburb occurrence exists for a particular street (e.g. Bridge), then no Selection form will necessarily display, and the Street/Suburb will be returned into the field. Once a Name, Property or Street/Suburb has been selected, no further text can be entered into the field (i.e. it is display only), however, double-clicking in the field, pressing F2 or using the Pop Up allows the user to select another record.

Once a link has been established pressing the detail button will take you directly to the record selected. E.g. directly to the Property Summary form.

**Note**: The ability to display 3 Module Links on this screen is a secured function. If no authority has been obtained to use this function, only one Module Link will be displayed on this form.

This functionality is only available where the user is entering a NEW request.
Name Module links will display the default Communication details as well as the formatted name,
e.g. Ms Justine Green - 83726111 (Home Phone Number).

If multiple links exist for any particular module link, then the 'Multiple Links' flag will be checked on.

See Display of Cross-Application Urgent Memos.

**Multiple Links**

This checkbox is not maintainable and will be checked ON if multiple links exist for the displayed Module Link.

**Mailing Address Enquiry**

Clicking the 'envelope' button displays the Mailing Address Enquiry form.

**Reference Link Type**

Four Reference fields are displayed on the Request Entry/Maintenance form. These fields are maintainable in both Request Entry and Request Maintenance. The Reference Types of these fields are defined in Customer Service System Parameters to allow References to be entered before a Request Type is selected and to keep the Reference Types consistent across all Request Types. In the event of the Reference already existing as a link to Customer Service it will be automatically linked without any further prompting. If more than three References are required, these can be entered and maintained via the References Option.

**Note**: This is a secured function. If no authority has been obtained to use this function, then References will not display on this screen. Access to References will only be via the References Option Button.

**Notes Button**

Pressing this button will present the Notes Maintenance Form.

If Notes already exist for the request then the button label will be in bold typeface.

**View Letter Button**
Pressing this button will allow you to view any documents created for this request.

If documents exist for this request the button label will be in bold typeface.

**Questionnaires Button**
The Questionnaire button will only be available if a Questionnaire has been created against the Request Type (otherwise it will be dimmed).

When the Questionnaires button is pressed, it will do the following:-

- It determines all 'valid' Questionnaires for the Request.

  This includes:-
  a) All answered Questionnaires (regardless of Historic/Current or Active/Inactive status)
  Plus
  b) Any 'Current' 'Active' Questionnaires with Questionnaire Code not matching any of those from (a)

- If the Questionnaire has not been answered, it will display each 'valid' Question for the Questionnaire – one at a time – until all Questions have been processed.

- If there is more than one Questionnaire and none are flagged as the default Questionnaire, then the Questionnaire Search Profile will display to allow the user to choose which Questionnaire to present.

- Once all Questions have been presented, it will display the Request Question Maintenance form.

- If the Questionnaire has been answered, it will display the Request Question Maintenance form directly.

**Modules Button**
Pressing this button will present the Module Links Maintenance form. This form allows for links to be created to other records within Pathway. E.g. a Property record.

**Create Letter Button**
Pressing this button will present the Letter Maintenance form. This form allows you to create a document based on information contained in the current request.

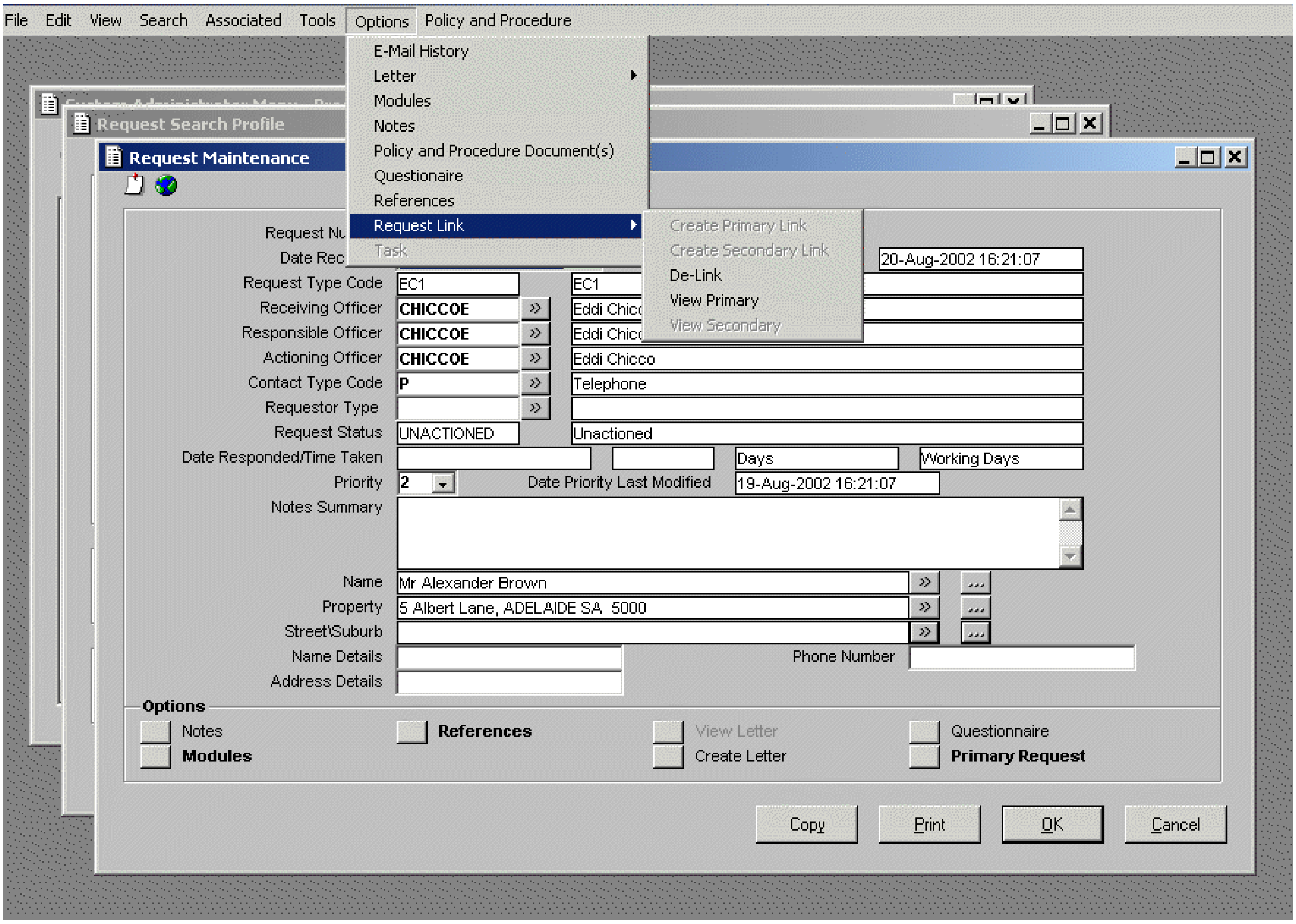
The Request must be linked to a Name record prior to selecting this option.

**Primary/Secondary Requests Button**
This button will only be displayed if you are maintaining a Primary or a Secondary Request.

**Primary Request**
If this button is displayed you are currently maintaining a Secondary Request. Press the Primary Request Button to maintain the primary request.

When maintaining a Secondary Request the Request Link option (from the Options Menu) will display the following options:

- De-Link
- View Primary



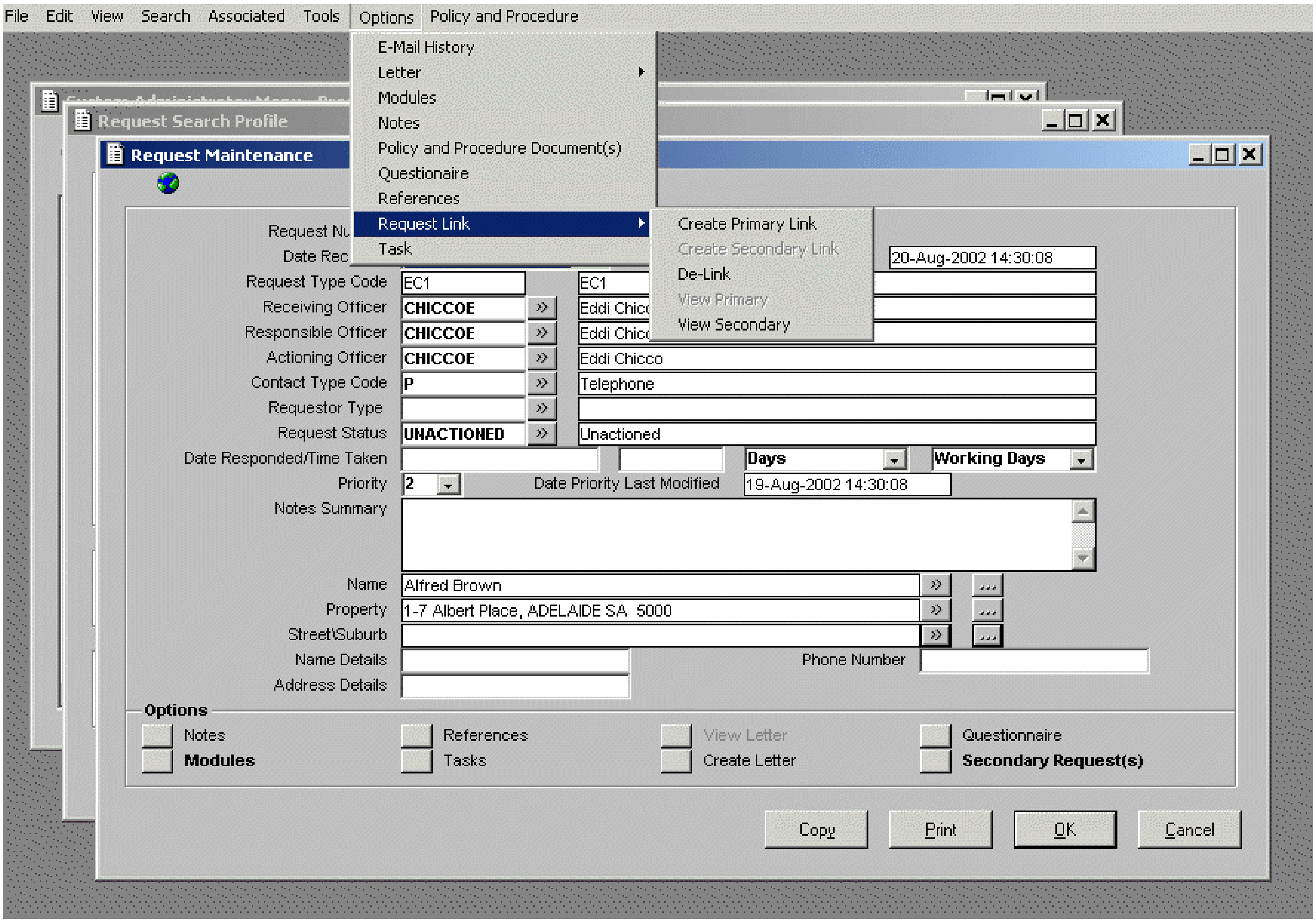

*Secondary Request showing Options available from Options/Request Link Menu*

**Secondary Request(s)**

If this button is displayed you are currently maintaining a Primary Request. Press the Secondary Requests Button to view a list of secondary requests (Associated Request Selection Form).

When maintaining a Primary Request the Request Link option (from the Options Menu) will display the following options:

- Create Primary Link
- De-Link
- View Secondary




*Primary Request showing options available from the Options/Request Link Menu*

**Tasks Button**

Pressing this button will present the Tasks against an application occurrence form. If tasks exist for this request the button label will be in bold typeface.

Refer to the Work Flow User Guide for more information on Tasks.

**References Button**

Pressing this button will present the Reference Maintenance form.

If References already exist for this request the button label will be in bold typeface.

**Inspections Button**

Selecting this button will display the Inspection Maintenance form. This form may also be accessed via the Inspections option on the Options menu (on the toolbar).

**Email History Button**

Selecting this button will display the Email Log Enquiry form. This button will be bolded if records exist. This form may also be accessed via the Email History option on the Options menu (on the toolbar).

**Refresh Button**

The Refresh Button is only available when requests are being created.

As Customer Service officers typically have the maintenance form ready to enter a new request the Refresh Button will re-set the Date Received to the current date and time and the Request Type field will be reset to nothing.

If Work Flow is being used then any Tasks that may have already been loaded will be deleted.

**Copy Button**
The Copy Button is designed to enable the Customer Service Officer to record more than one Request from the same Customer at the same time. The Copy button when selected will default the Customer Details, Contact Type, Requestor and Property Address Details if required.

In maintenance mode when the copy function is used for multiple Requests, a scroll bar allows the user to move back and forward between the Requests entered during this Request Entry.

E-mail will not be sent to the Responsible Officers until the last Request has been accepted.

**Print Button**
The Print Button allows the user to print a work order. Selecting the Print Button displays the Print Maintenance form where options can be selected to generate and/or print details of the Customer Request.

**Note**: This is a secured function. Authority is required for access to this button.

## Print Maintenance Form

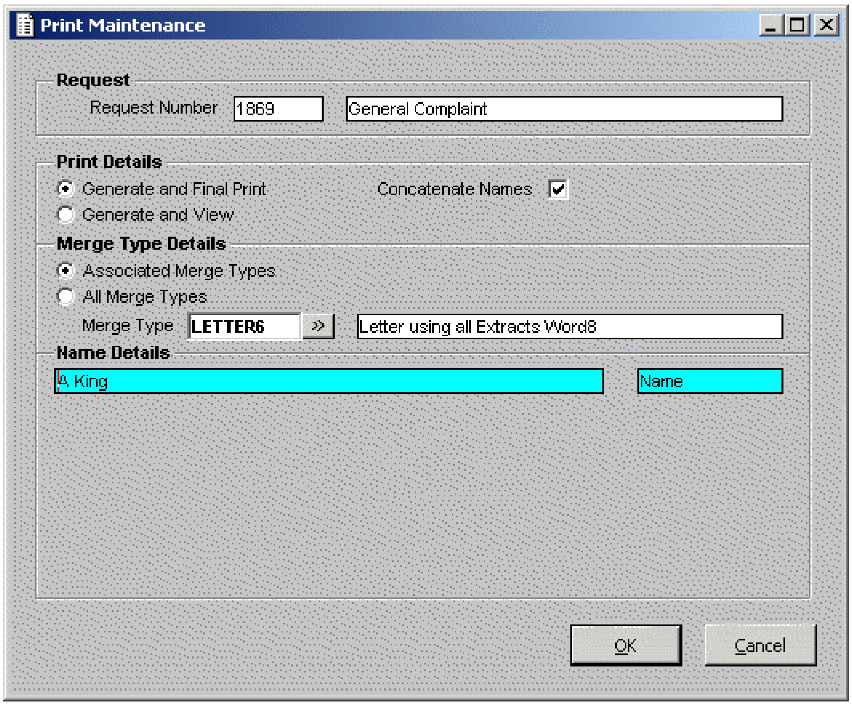
The Print Maintenance form is accessed via the Print button on the Customer Request Entry/Maintenance form. This form allows users to define options when generating or printing a document. The options available are:

Print Details:

- Generate and View
- Generate and Final Print
- Concatenate Names

Merge Type Details:

- Associated Merge Types
- All Merge Types




*Print Maintenance Form*

**Request Number**
These fields display the associated Request Number and description. These fields are display only and cannot be maintained.

**Print Details**

The print options available are as follows:

- Generate and View
- Generate and Final Print

These options are mutually exclusive. Selecting ‘Generate and View’ will generate the documents and allow the user to access and view the documents. ‘Generate and Final Print’ will generate and then print the documents.

**Note**: The Document Request and documents generated and/or printed by this option are automatically deleted following the generation/print and will not be stored against the Customer Service Request.

There is no requirement to have a Name Link stored against the Customer Service Request. If there are Name Links then these will be used as the Document Addressee on the Customer Service Request.

**Concatenate Names**

If the ‘Concatenate Names’ flag is checked on then a document will be created and addressed to all Name Links that are selected.

If the ‘Concatenate Names’ flag is checked off then a document will be generated for each Name Link that is selected. The first Name against the Customer Service Link will be used for the Document Address.

**Merge Type Details**

Selecting ‘Associated Merge Types’ will display Merge Types that are associated to the Request Type. ‘All Merge Types’ will display all Merge Types that have been defined for Customer Service and allow the user to select one Merge Type to be used for printing the document.

**Merge Type**

The Merge Type field will display the default Merge Type selected at the Request Type level. If no Merge Type was set at the Request Type level then the System Parameter default will be used. If no System Default has been set up then no Merge Type will be defaulted into the Merge Type field.

Selection of an appropriate Merge Type is by keying directly into the field or making a selection from the Pop Up.

**Name Details**

The Name Details section displays any Names that have been linked to the Customer Service Request. The document that is generated can be addressed to one or all names in this list dependant on the selection made. There is no requirement to have a Name Link stored against the Customer Service Request. If there are Name Links then these will be used as the Document Addressee on the Customer Service Request.

If the ‘Concatenate Names’ flag is checked on then a document will be created and addressed to all Name Links that are selected.

If the ‘Concatenate Names’ flag is checked off then a document will be generated for each Name Link that is selected. The first Name against the Customer Service Link will be used for the Document Address.

## Primary Request Selection Form

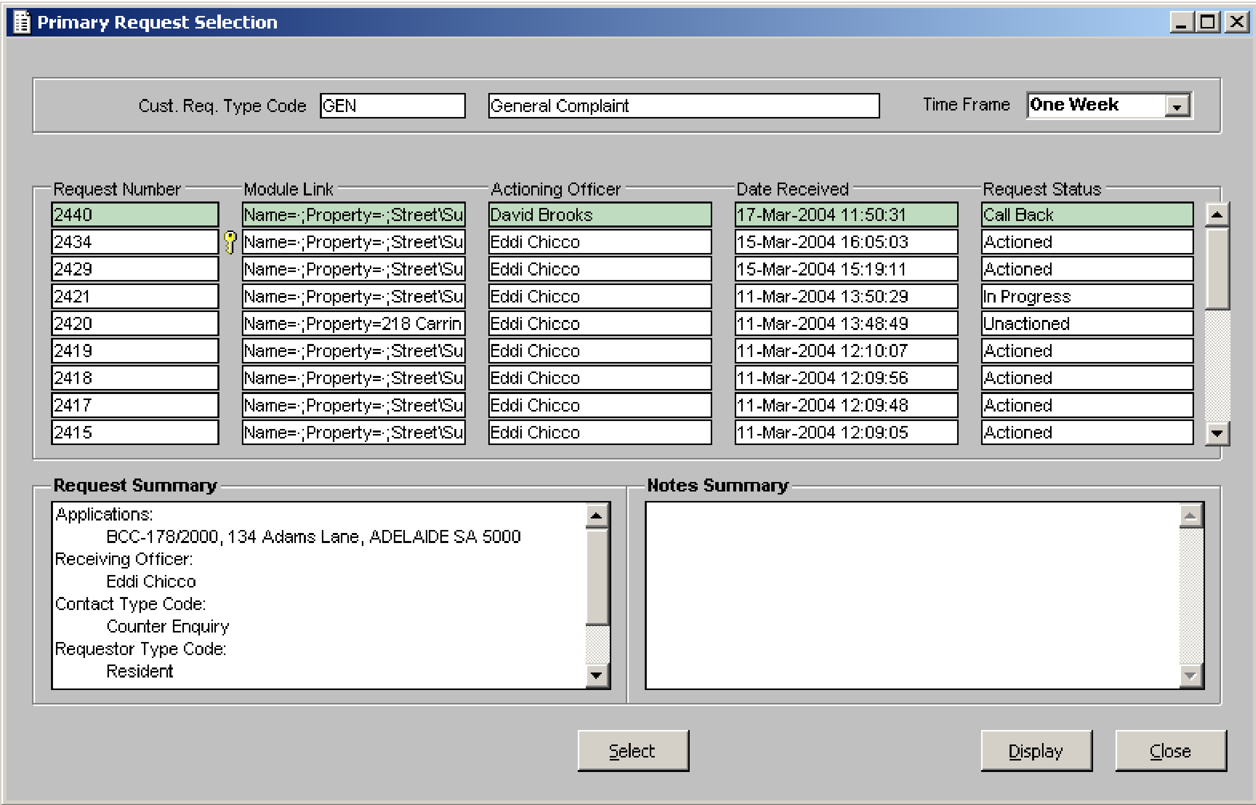
This form displays when creating a new request. If the Request Type entered has been established, with the automatic search feature turned on, then this form will display all requests entered for the same request type within the nominated time frame set at the parameter level.

The facility exists on this form to search over a different time period if required. If a request on this form is decided to be the Primary Request then highlight the appropriate request and press the Select Button. The request you are currently creating will become a secondary request, the Date to Respond By field will not be updated and the Status field will not be accessible. If Work Flow is being used no Tasks will be loaded onto the secondary request. When the Primary Request has been actioned the status will be automatically updated on the secondary request.

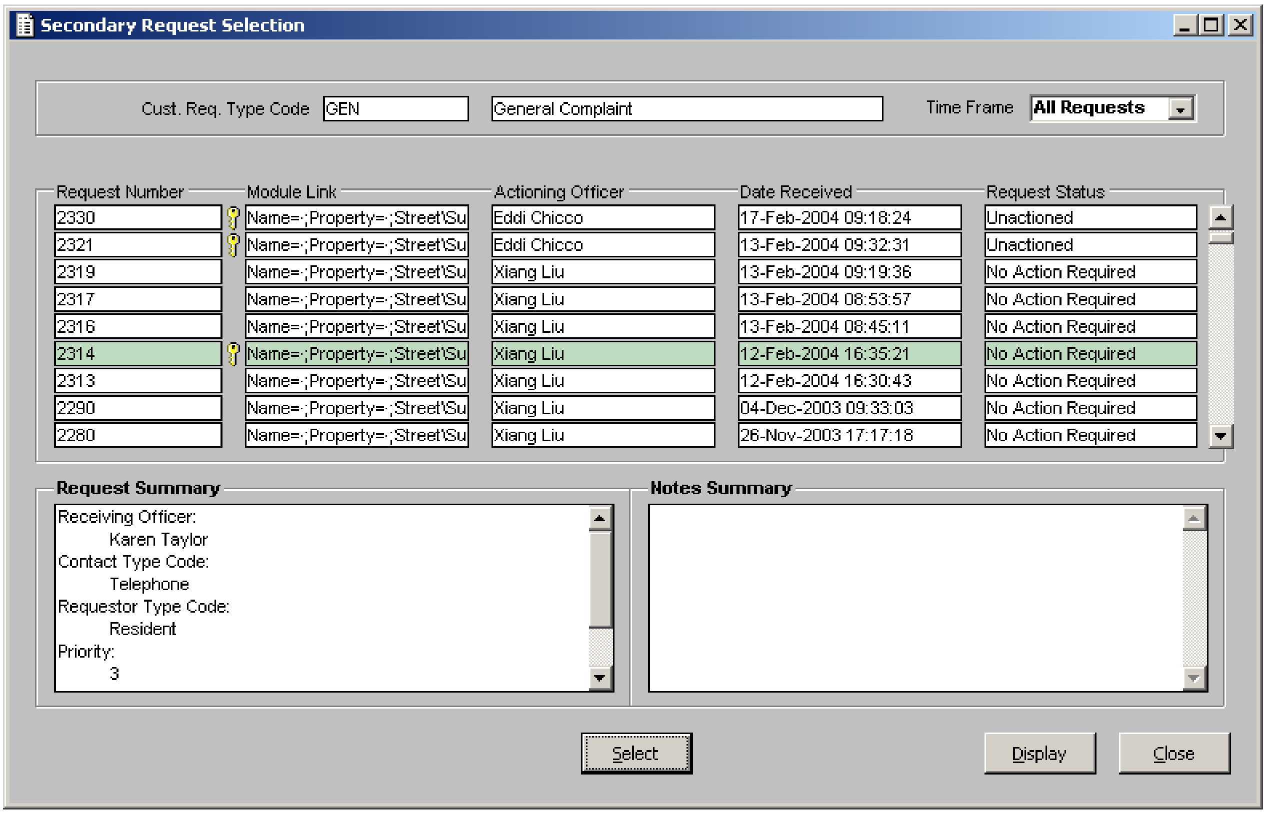
Only Primary Requests will be displayed on this form. You cannot attach a secondary request to another secondary request.

If you do not wish to link the request you are creating as a secondary request then press the Close Button.

Similar to the Request Selection form, the Primary/Secondary Request Selection form for linking Requests now displays the little lock or little key to indicate a locked Request. When the locked Request gets focus, the message 'Request xxx is locked by xxx' is displayed on the message area at the bottom of the window. Refer to the section on Request Locking (148) for further details.




*Primary Request Selection Form*




*Secondary Request Selection Form*

### Request Type Code

This field displays the request type code and description that is currently being entered.
This field is display only and may not be maintained.

### Time Frame

This field displays the time frame over which the system searched for primary requests that match the request type. By selecting a value from the drop down list you may extend or reduce the search time frame.

### Request Number

This field displays the request number of all primary requests that match the search criteria.
This field is display only and may not be maintained.

### Module Link

This field displays the primary module links for the primary request (i.e. only those module links which have been flagged to display on the Request Entry screen). This field is display only and may not be maintained.
If a Request Type has the Confidential flag checked on and the user does not have authority, then Module Links details will not be displayed. The following message will display instead:
*** This is a Confidential Request ***

### Actioning Officer

This field displays the current responsible officer for the primary request. This field is display only and may not be maintained.

### Date Received

This field displays the date the primary request was received. This field is display only and may not be maintained.

### Request Status

This field displays the current status of the primary request. This field is display only and may not be maintained.

### Request Summary

The Request Summary box displays details of the Customer Request, including any Module links which have been set up. This field is scrollable. If a Request Type has the Confidential flag checked on and the user does not have authority, then Request Summary details will not be displayed. The following message will display instead:

*** This is a Confidential Request ***
The current User does not have access to this information.

**Notes Summary**
The Notes Summary box displays details of any Notes which have been entered against the Customer Request. Each separate Note will be identified by the Date and Time as well as the Officer responsible for entering the Note. If a Request Type has the Confidential flag checked on and the user does not have authority, then Notes Summary details will not be displayed. The following message will display instead:
*** This is a Confidential Request ***
The current User does not have access to this information.

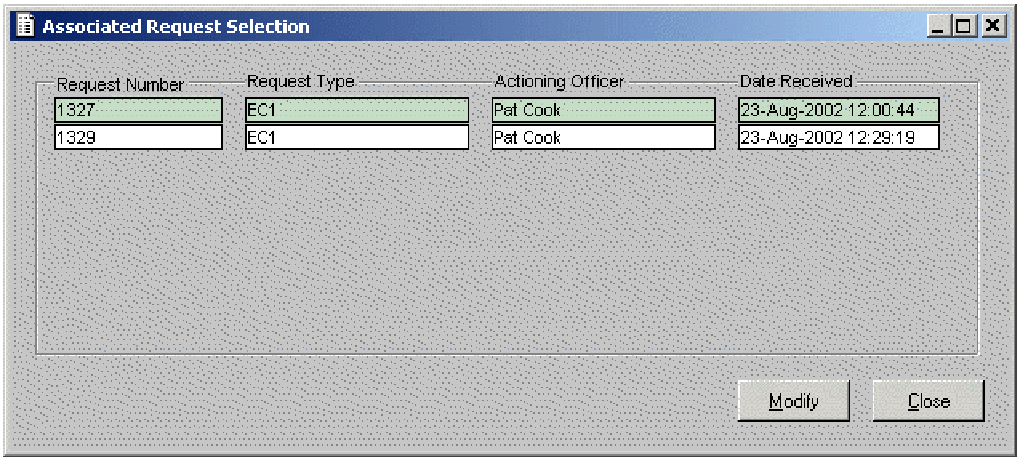
## Associated Request Selection Form

This form is presented when the Secondary Requests option button is pressed on the Request Maintenance form.

This form displays all requests that have been nominated as “Secondary” to the request currently being maintained.

From this form you may select a secondary request to modify or press cancel to return to the Primary Request.

The Associated Request Selection form now displays the little lock or little key to indicate the lock on a Request. When a locked Request gets focus, a message ‘Request xxx is locked by xxx’ is displayed at the bottom of the window. Refer to the section on Request Locking (148) for further details.



*Associated Request Selection Form*

**Number**
This field displays the request number of the secondary request.

This field is display only and may not be maintained.

**Request Type**
This field displays the request type of the secondary request.

This field is display only and may not be maintained.

**Actioning Officer**
This field displays the name of the current Actioning Officer for the secondary request.

This field is display only and may not be maintained.

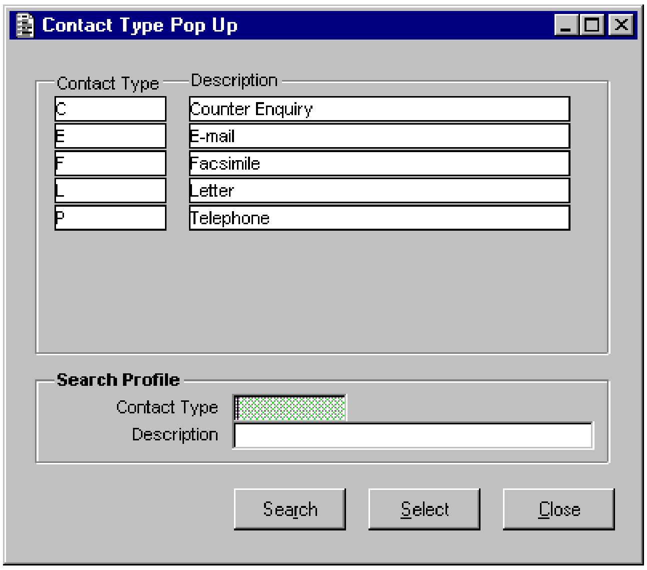
**Date Received**

This field displays the date and time that the secondary request was received.

This field is display only and may not be maintained.

## Contact Pop Up Form

This form is a standard pop up form. It will be displayed whenever the pop up button is pressed on the Contact field or an invalid contact code is entered.




*Contact Type Pop Up Form*

**Contact**
This field displays the contact type code.

This field is display only and may not be maintained.

**Description**
This field displays the full description of the contact type.

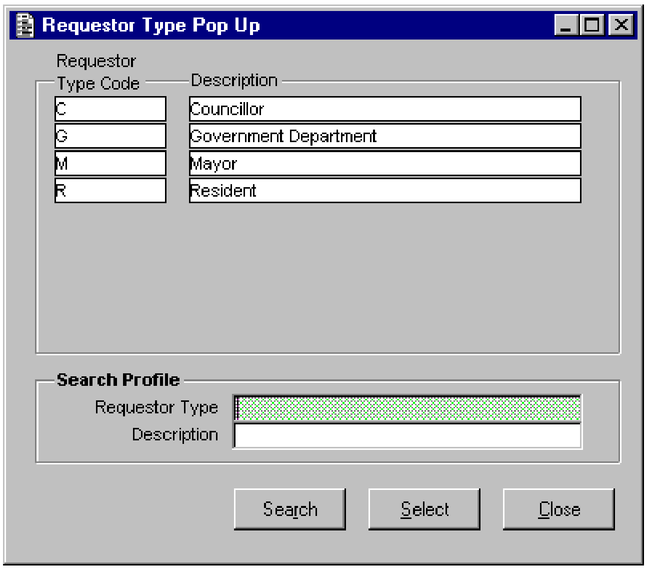
This field is display only and may not be maintained.

**Search Profile**
This area may be used to search for specific contact types.

Full wild card searching is available in these fields.

## Requestor Pop Up Form

This form is a standard pop up form. It will be displayed whenever the pop up button is pressed on the Requestor field or an invalid Requestor code is entered.



*Requestor Type Pop Up Form*

**Requestor Code**

This field displays the Requestor type code.

This field is display only and may not be maintained.

**Description**

This field displays the full description of the Requestor type.

This field is display only and may not be maintained.

**Search Profile**

This area may be used to search for specific requestor types.

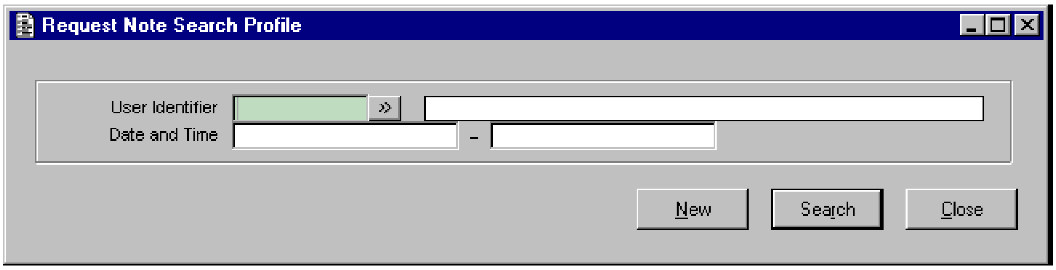
Full wild card searching is available in these fields.

## Request Note Search Profile Form

This form is presented when the Notes option button is pressed on the Request Maintenance Form (providing the Filter Flag is turned on for this form).

An unlimited number of Notes may be created for a Request.

From this form you may either enter a search profile to search on existing notes or create a new note by pressing the New Button.



*Request Note Search Profile Form*

**User Identifier**

Enter a valid User ID into this field to search for all notes written by a specific user. Alternatively press the pop up button associated with the field to display the user pop up form from which you may make a selection. The full user name is also displayed.

**Date and Time**

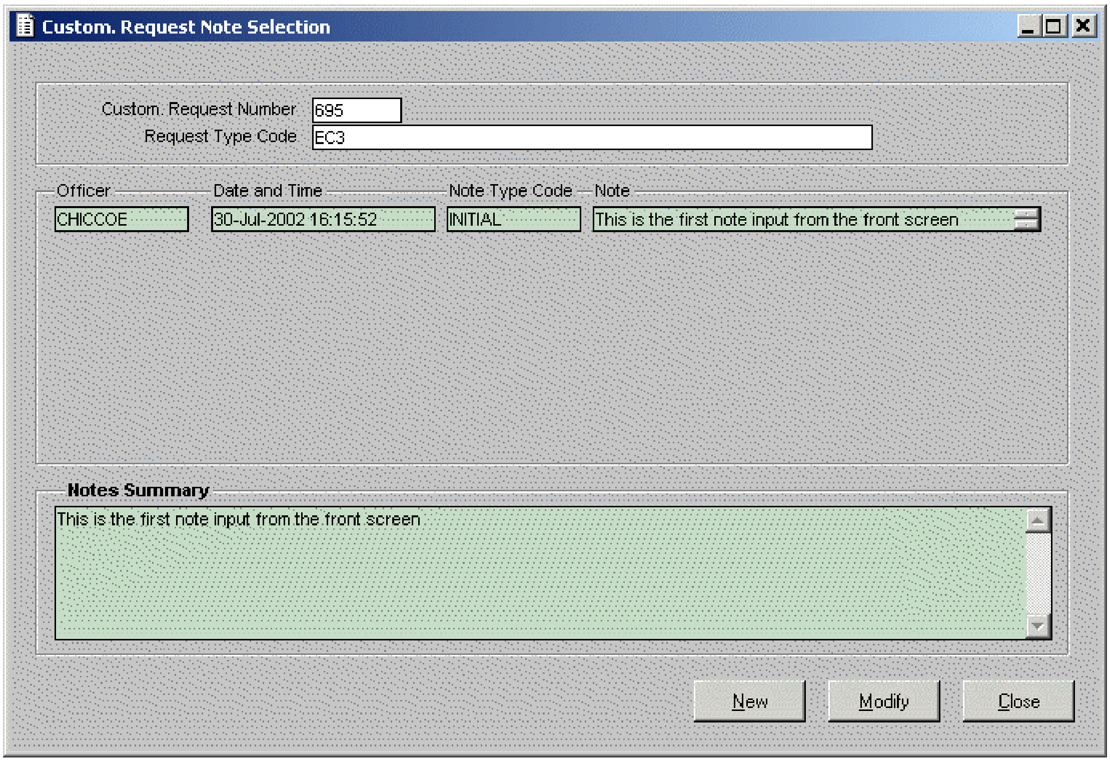
Enter a Date/Time range to restrict your search to those notes matching the search criteria. If no specific time is entered then 00:00:00 is assumed.

## Request Note Selection Form

This form displays all notes that match the search criteria entered.

An unlimited number of notes may be added to a single request.

From this form you may:-
- create new notes (New Button, F9 or Edit/New)
- modify an existing note (Select the note you wish to modify and press the Modify Button or double click)




*Request Note Selection Form*

**Number**

This field displays the Request Number that the Note is being created for. This field is display only and may not be maintained.

**Request Type**

This field displays the Request Type. This field is display only and may not be maintained.

**Officer**

This field displays the User Id of the officer that created the Note on the current Request. This field is display only and may not be maintained.

**Date/Time**

This field displays the date and time that the Note was created. This field is display only and may not be maintained.

**Note Type Code**

This field displays the Note Type of the selected Note. This field is display only and may not be maintained.

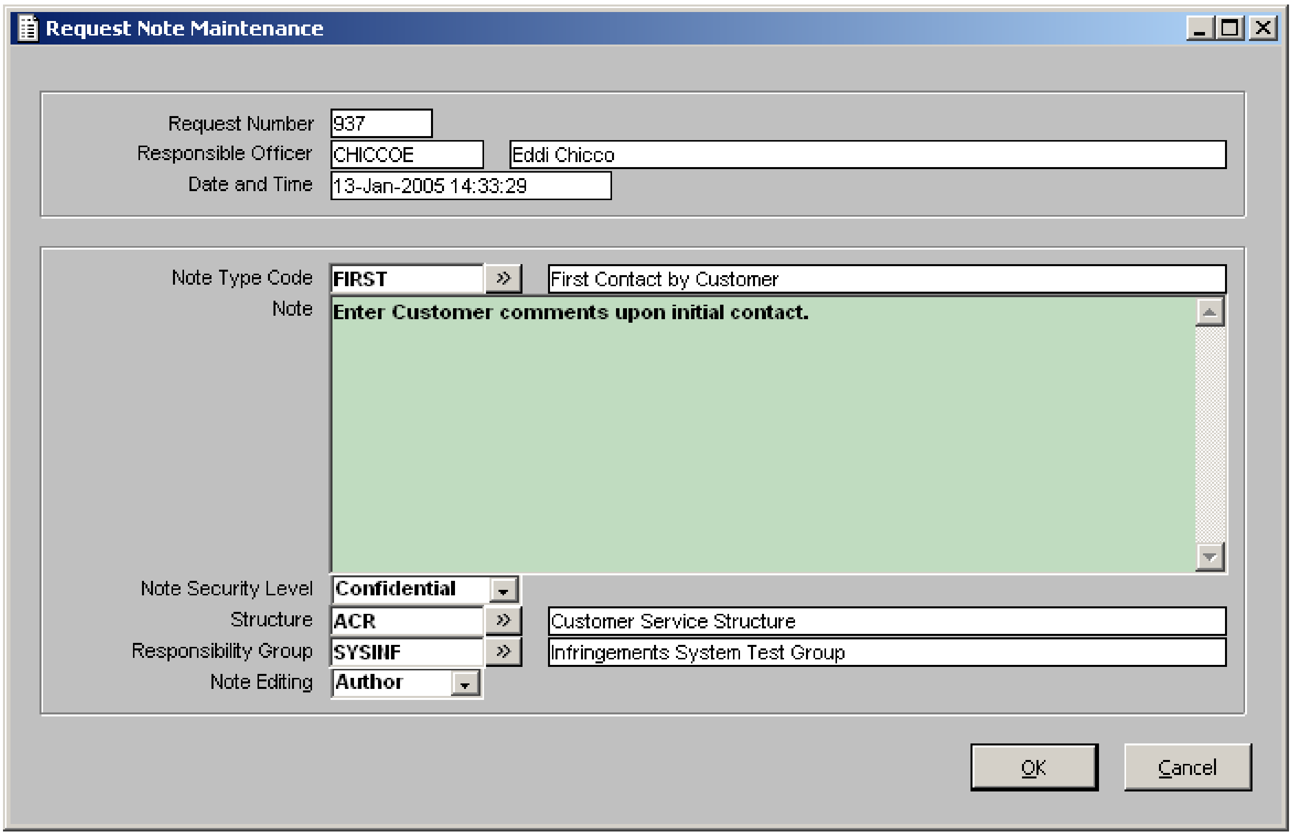
**Note**
This field displays the first line of the attached note. If the Note is 'Confidential' and the user is NOT in the Structure or Group assigned to the Note, then they should not see any details of the Note. This field is display only and may not be maintained.

**Notes Summary**
This field displays the full note details. If all the details cannot be viewed then the zoom function may be used. (Press F2, double click on the field or select View, Zoom). This field is display only and may not be maintained.

## Request Note Maintenance Form

This form allows you to :-

- enter and modify Note text
- delete an existing Note (F11 or Edit/Delete)




*Request Note Maintenance Form*

**Number**
This field displays the current request number.

This field is display only and may not be maintained.

**Responsible Officer**
This field displays the name of the officer that created the note.

This field is display only and may not be maintained.

**Date and Time**
This field displays the date and time that the note record was created.

This field is display only and may not be maintained.

**Note Type Code**

This field allows the Note Type Code to be selected from the Pop Up. Initially, when the form is opened, it will be set to the default Note Type. If you attempt to change the Note Type of the Note, then, after selecting another Note Type with template text, you will be prompted with a question about overwriting the Note with the Template from the new Note Type. Answer 'Yes' to overwrite the Note Text, answer 'No' to leave the Note Text alone, or answer 'Cancel' to abandon the change altogether.

If the Request Note Maintenance form has been accessed via the Workflow Task User Action based on the 'Newnote' System Action, the initial Note defaults will be derived from the Note Type chosen for the Request Type in the User Action parameters. There will also be an information message in the Task Bar saying: 'User Action Parameter Note Type has been applied.'

Note: If the user selects a Request for a Request type that does not have any parameters defined then the standard Note Type Default from the associated Parent Request Type will be applied.

In Request Maintenance, upon entry of a new Note, focus will be on the Note Type field with a default value displayed. On modification of a Note, focus will be placed in the Note field.

In Request Enquiry, when reviewing a Note, the cursor will be positioned in the Note field.

**Note**

This field allows for the entry of an unlimited amount of text to be entered against the customer request.

Don't forget that Spell Check is available (Tools, Spelling)

**Note Security Level**

This field allows a security Level to be selected from the dropdown. The options available are:

- General
- Restricted
- Confidential

If 'Confidential' is selected then the Structure and Responsibility Group fields become available to allow the user to place some security over the display and maintenance of the Request Note.

**Note**: It is possible to change the Structure and Group on the Note to exclude yourself. If you select a Structure and Group that you are not a member of then you will be excluded from ever seeing this Note again.

See also Note Security Parameters

**Structure and Responsibility Group**

For Confidential Notes, the Structure and Responsibility Group will be defaulted in from the Note Type parameters. These may be overridden at the Request Note Maintenance level. The nomination of a Structure and Group determine which Pathway users are able to view or work with a Note.

**Note Editing**

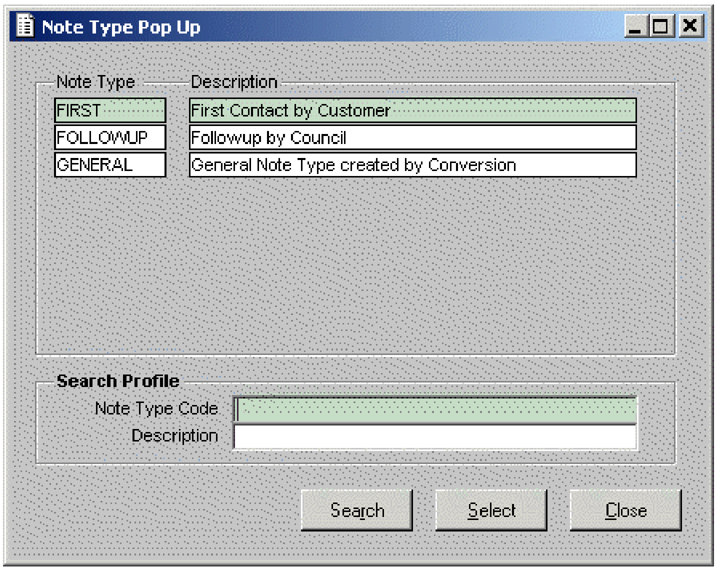
The Note Editing field controls who is able to make changes to Request Notes. It provides three options as follows:

- All – will allow all users to edit the note.
- Author – will allow only the author to edit the note (unless the user has Supervisor access)
- None – will not allow any user to edit the note (unless the user has Supervisor access)

Where a user has Supervisor Editing on Notes authority, they are able to access the "Note Editing" field against a Note to change the setting of this field. In addition they are able to edit the Note without having to change the "Note Editing" option.

## Note Type Pop Up Form

This form allows selection of a Note Type on which to base the current Request Note. It will display when the Note Type Code Pop Up button is selected from the Request Note Maintenance form.




*Note Type Pop Up Form*

### Note Type / Description

These fields display the available Note Types and Descriptions.

### Search Profile – Note Type Code / Description

These fields may be used to enter a Note Type Code and/or Description as a search profile. This feature is useful when there are more than 9 Note Types set up.

## Module Links Maintenance Form

This form is presented when the Modules option button is pressed on the Request Maintenance form or the Modules option is selected from the Options Menu.

This form lists all external module occurrences which may be linked to the current request. Each assigned Role Type will display with a button and heading. Alongside this will be listed all the Role links of that type for the Request. Multiple Role links will be listed with the Role Type button and heading being displayed only for the first link in the group. The user is able to see at a glance all the Role links for the Request.

To create a link, click on the required module name e.g. Property Administration and press the Insert Button (F9). The appropriate Search Profile will be presented e.g. Property Search Profile where you may enter your search criteria for the appropriate record. Alternatively, you may click on the button to the left of the module link name.

To remove an existing link, click on the appropriate linked record and press F11 (or Edit/Delete).

The detail button at the end of the linked record will take you directly to that record.

The Primary Role Types which can be linked to Customer Service are the following:

- Name
- Property
- Animal
- Street/Suburb
- Application
- Assessment
- Infringement

- Licensing
- Registers

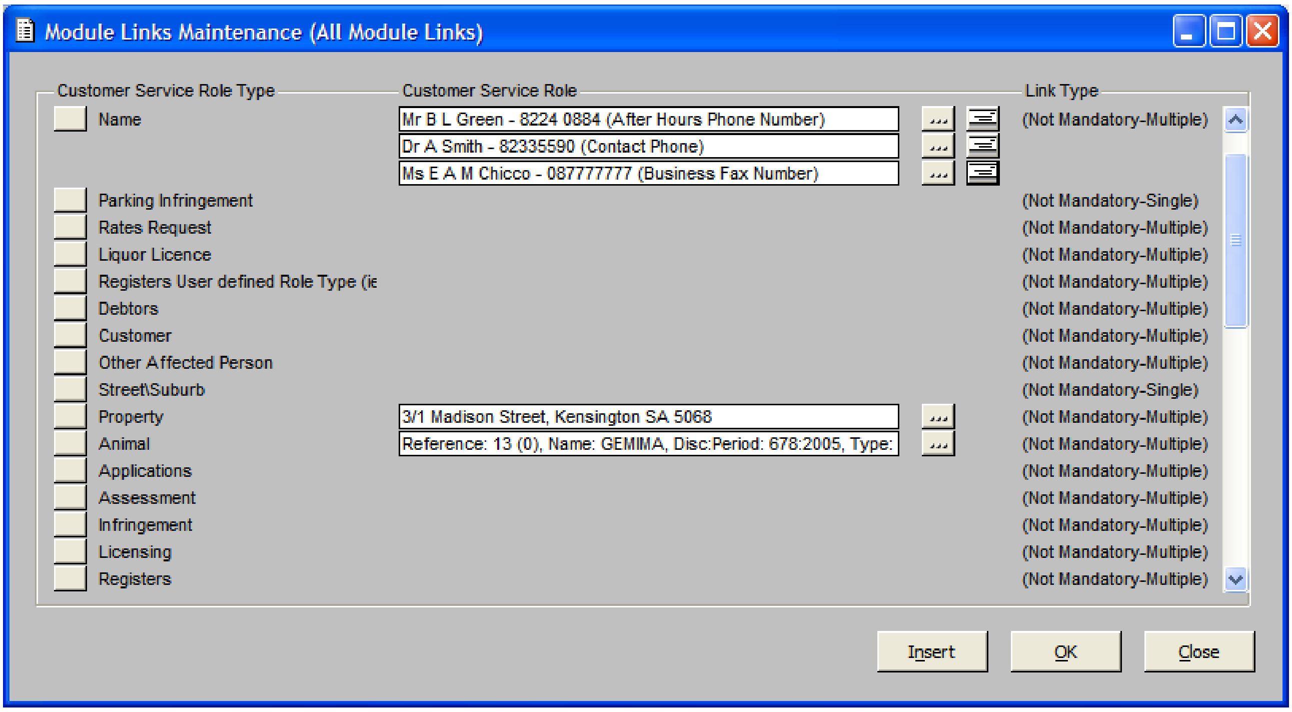
In addition to these, user defined Role Types based on the Primary Role Types will display if they have been assigned in the Request Type parameters.

Note: When adding or deleting links, the Insert and Delete actions occur immediately. That is to say, once a new link has been selected and added to the form, or when a link has been deleted, the actions have been committed to the database. Clicking on 'Cancel' will not give the user the option of backing out the changes.

Note: If the user does not have access to the various "View Req Summary.." secured functions then some details included on this form may not be viewable. The details will be replaced by the message "***Details Blocked***". This function is controlled by the Authorised Function "Customer Service History Logging".

**Display Of Cross-Application/Urgent Memos**

When creating a new Request and a Street/Suburb is selected to be linked to the Customer Service Request, a check will be made on any urgent Memos that are recorded against the Street selected. The display of the Urgent Memo will occur on selection of the Street. If the Urgent Memo, for the Street, is designated as a Cross Application Memo, then it will display when the Customer Service Request is maintained at a later time. If the Memo is not a Cross Application Memo, then it will only be displayed if you detail out to view the Street details. Specifying a Memo as a Cross Application Memo is achieved by checking on the 'Cross App' Checkbox in the Memo Maintenance Form for the selected Memo.




*Module Links Maintenance Form*

**Customer Service Role Type**

This button displays the name of the module link which may be created. Clicking the button will insert a new module link.

**Customer Service Role**

This field displays the description of the Role record which is linked to this customer request. Clicking the detail button against a role link will display the appropriate maintenance form for the linked record (depending on security).

**Examples**

If the link is a property record you will be presented with the Property Summary Form for the nominated property.

If the link is a name record from central Name and Address you will be presented with the Personal/Company Name Maintenance Form.

As new Role links are created the details of the selected link are added to the displayed form. If a Property or Street/Suburb link is added, and the system is set to automatically link Wards, then a Ward link will also be created (as long as the standard Ward Role type (LPA-3) is also associated with the Request Type).

Clicking the 'envelope' button displays the Mailing Address Enquiry form.

**Link Type**
This field describes the type of link which exists. The following options will display:

**(Not Mandatory)**
Indicates that the link is available but the user will not be forced to make an entry.

**(Mandatory)**
Indicates that the link is available and the user must create a link to the external module.

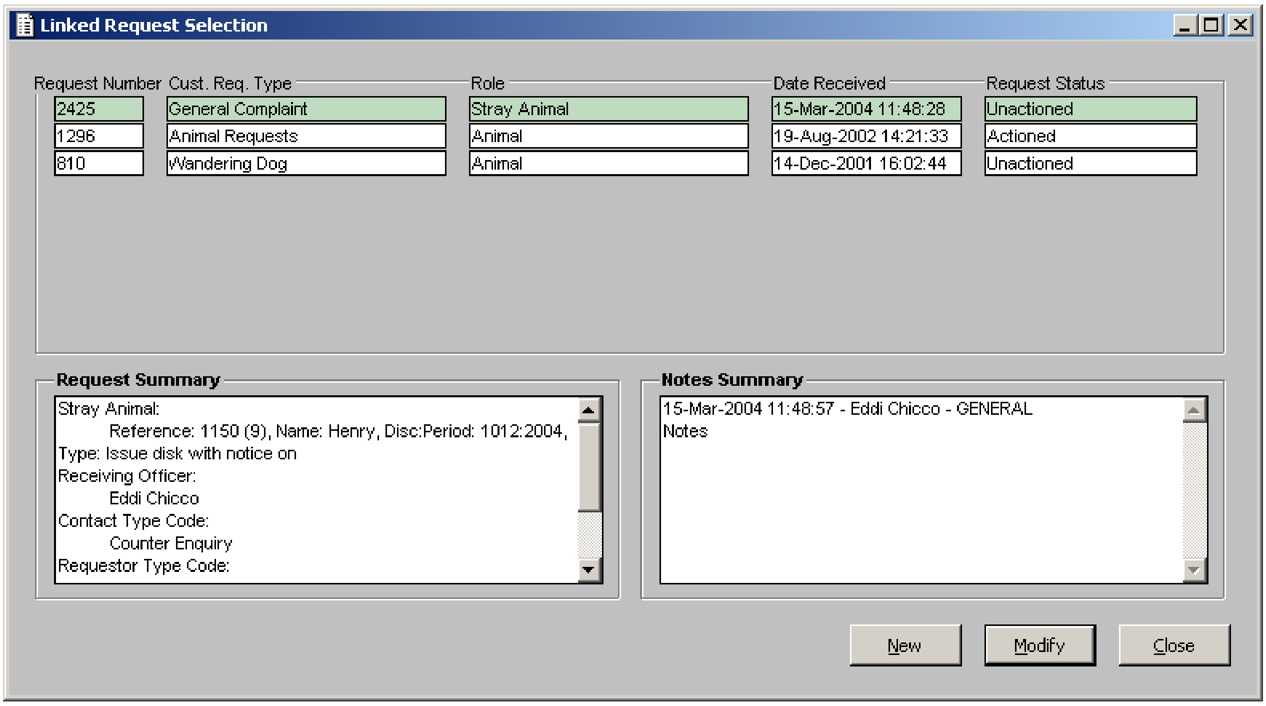
**(Multiple)**
Indicates that the user is able to select multiple records from the external module. For instance, multiple properties may be selected to link to the customer request.

**(Single)**
Indicates that the user may only select one record from the external module. For instance, only one property may be selected to link to the customer request.

## Linked Request Selection Form

The Linked Request Selection form displays when the Customer Service Module Link button or option is selected from another application e.g. Animal Registration. It enables Customer Service Requests to be linked to another record (e.g. Animal record) if the user has the required authority. Any linked Requests may be viewed and maintained via this form (if the user has the required authority).

Note: When an External Module (e.g., Application, Property) calls Customer Service to display all linked Customer Service Requests, users are able to create a new link or maintain an existing link if they are authorized.


Linked Request Selection

| Request Number | Cust. Req. Type | Role | Date Received | Request Status |
|---|---|---|---|---|
| 2425 | General Complaint | Stray Animal | 15-Mar-2004 11:48:28 | Unactioned |
| 1296 | Animal Requests | Animal | 19-Aug-2002 14:21:33 | Actioned |
| 810 | Wandering Dog | Animal | 14-Dec-2001 16:02:44 | Unactioned |

**Request Summary**
Stray Animal:
Reference: 1150 (9), Name: Henry, Disc:Period: 1012:2004,
Type: Issue disk with notice on
Receiving Officer:
Eddi Chicco
Contact Type Code:
Counter Enquiry
Requestor Type Code:

**Notes Summary**
15-Mar-2004 11:48:57 - Eddi Chicco - GENERAL
Notes

New Modify Close

*Linked Request Selection form*

**Request Number**
This field displays the Request Number.

**Request Type**
This field displays the Request Type description.

**Role**
This field displays the Role Type description of the Request (which can be user defined or system defined).

**Date Received**
This field displays the Date on which the Request was created.

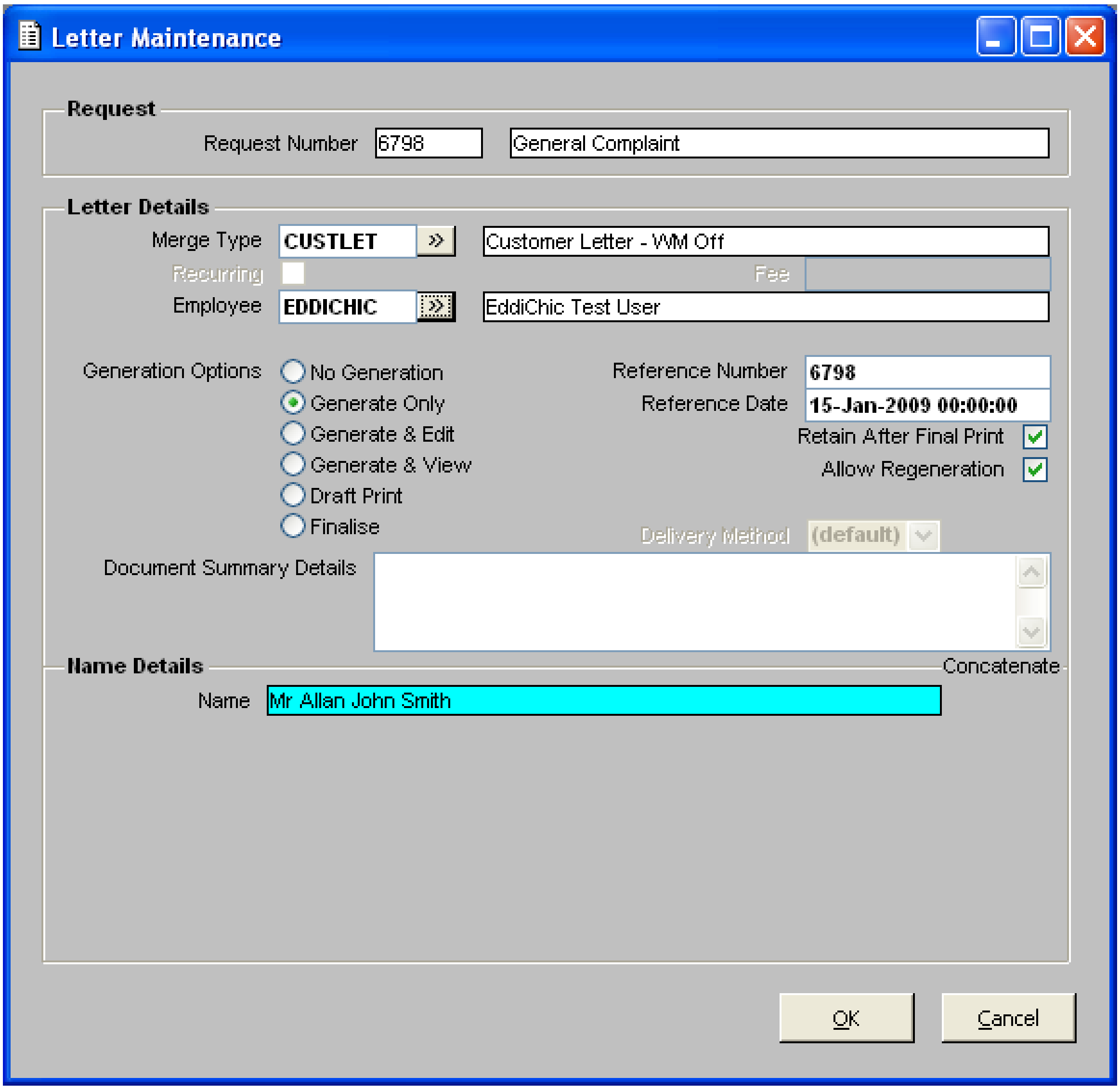
**Request Status**
This field displays the Status of the Request e.g. UNACTIONED.

**Request Summary**
The Request Summary box displays the Request details. The scroll bar may be used to view the entire contents.

**Notes Summary**
The Notes Summary box displays the Notes details. The scroll bar may be used to view the entire contents.

## Letter Maintenance Form

This form displays when the Create Letter option button is pressed on the Request Maintenance form. This form allows you to generate documents for the current customer request.




*Letter Maintenance Form*

Note: The customer request record must have a name link in order to perform this function.

**Request Number**

This field displays the current request number and request type.

This field is display only and may not be maintained.

**Merge Type**

Enter the merge type code applicable to the document you wish to create. Alternatively press the pop up button associated with the field to select from the Request Type Merge Type Pop Up.

**Recurring Flag**

If this checkbox is checked on, the document is flagged as recurring. Recurring letters may be identified to enable bulk selection and printing via the Document Batch Processing option. The Recurring default is set as a Merge Type Default.

**Employee**

The Employee field will contain default details if they were set up at the Merge Type level. These details may be overridden on this form by keying in appropriate details or selecting a different Employee from the popup. [The Pop Up will only display User Employee details that have been set up in User Maintenance].

**Fee**

This field contains the fee associated with the document request. This is an optional field which may not be displayed for certain Merge Types. This field is available for printing on documents.

**Generation Options**

The following options will be available for document generation:

- No Generation – This creates the document request without generation of the document.
- Generate Only – This option creates the request and generates the document. The document may be printed at a later date using one of the Print options or the Batch Print Facility.
- Generate & Edit – This option creates the request and generates the document. The document is automatically loaded for editing via Document Maintenance. When multiple documents are generated only the first document is automatically loaded for editing. After returning to Pathway from the edited document the Document Maintenance form will be available for any other documents to be selected for editing as required. This option can only be used when the selected Merge Type allows editing.
- Draft Print – This option creates the request, generates the document plus performs a Draft print of the document (which includes the watermark). This option can only be used when the selected Merge Type allows editing.
- Final Print – This option creates the request, generates the document plus performs a Final print of the document.

**Reference Number**

This field contains an optional Reference Number to identify the document being generated. This field is available for printing on documents

**Reference Date**

This field contains an optional reference date to identify the document being generated. This field is available for printing on documents.

**Retain after Final Print**

If this checkbox is checked on, word documents will be retained after they have been printed, to enable editing and further reprints if required. If the checkbox is checked off, printing a document will remove that document from the system. The document request will remain and the document will need to be regenerated if a reprint is required. The default on this parameter will depend on the 'Retain After Printing' option which is specified on the Merge Type. (Refer to the Merge Type Maintenance chapter for further details regarding defining Merge Types.) This flag setting can be overridden by the 'Retain After Printing' flag setting on the Batch Processing form.

**Allow Regeneration Flag**

If this checkbox is checked on, a document which has been generated may be regenerated as required (e.g. after changes to a Customer Request). The Allow Regeneration option will default as checked on when creating a new document request and may be checked off during the request entry process if required.

**Document Summary Details**

This field is a free-form text field which may be used to add summary notes to be recorded against the document.

**Name Details**

This list displays all the name records linked to the current customer request.

This is a multi-select list. When the form is accessed, all Names will be automatically selected. Click on the names that you wish to generate documents for. (Hold the Control key, or shift key, down as you do this).

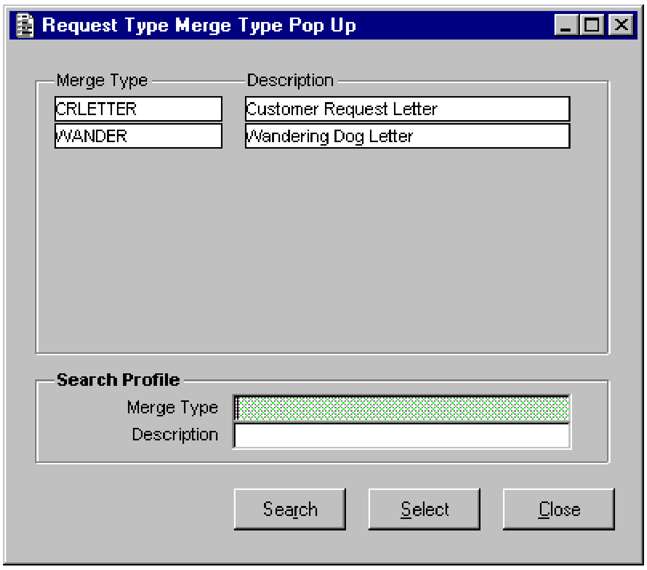
**Concatenate Names Flag**

The Concatenate flag is available when more than 1 name exists within a Role Type. If this flag is checked ON, multiple Names, within each Role Type group, will be concatenated (i.e. joined together) in one single document. If this flag is checked OFF, then individual letters will be created for each Name selected.

## Request Type Merge Type Pop Up Form

This form is a standard pop up form. It will be displayed whenever the pop up button is pressed on the Merge Type field or an invalid merge type code is entered.

This pop up list will display all available document templates for the request type.




*Request Type Merge Type Pop Up Form*

**Merge Type**
This field displays the code assigned to the merge type.

This field is display only and may not be maintained.

**Description**
This field displays the full description assigned to the merge type.

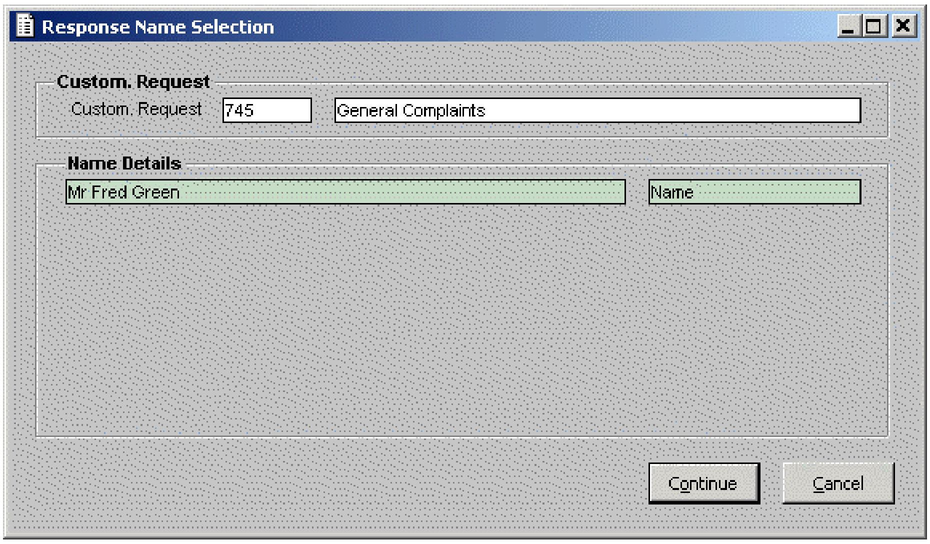
This field is display only and may not be maintained.

**Search Profile**
This area may be used to search for specific merge types.

Full wild card searching is available in these fields.

## Response Name Selection Form

The Response Name Selection form will display when the Insert button is selected to add a new Response to the Customer Request. Additionally, it will display when the Responses Option is selected from the Options Menu if there is more than one name linked to a Request. It will display all names linked to a Request and allow selection of one or many names to attach to a Response.




*Response Name Selection Form*

**Request**

This field displays the Request Number and Description of the current Request. These fields are display only.

**Name Details**

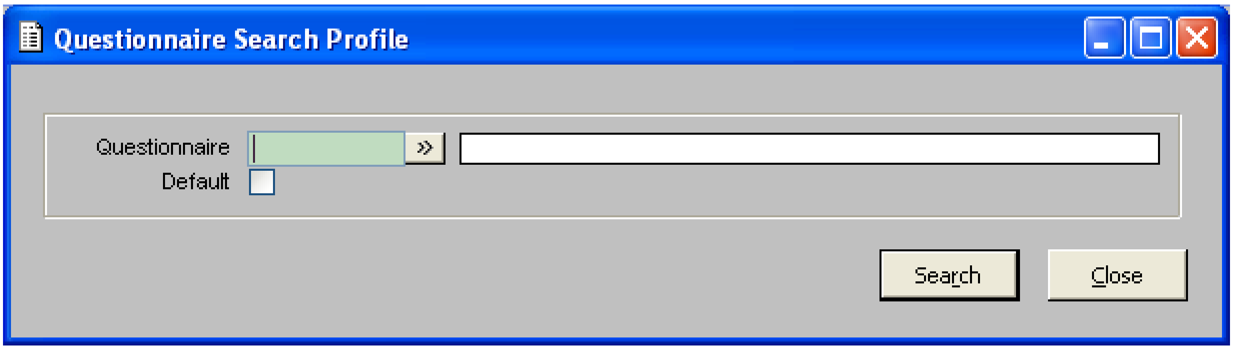
These fields display all names linked to the Request as Name Module links. Selecting one or more names and selecting the Continue button will default the selected names/s to the Response Maintenance form (Multi-selection of names will concatenate them).

# Questionnaire Maintenance

## Questionnaire Search Profile Form

The Questionnaire Search Profile form allows the user to either search for all Questionnaires or to refine the search by defining full or partial details of the Questionnaires to find and/or by selecting the Default Questionnaire only.

A Popup Up form will be displayed when the Questionnaire Pop Up button is pressed.



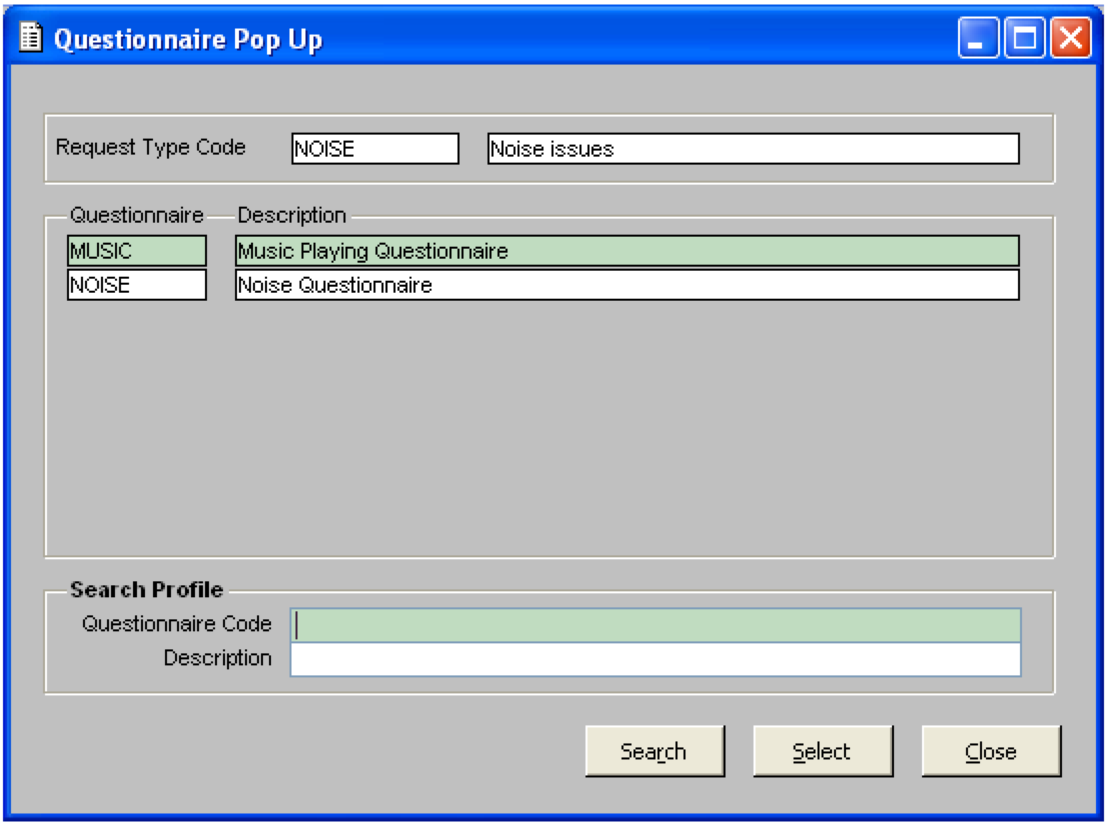

*Questionnaire Search Profile*

## Questionnaire Pop Up Form

The Questionnaire Pop Up form displays all Questionnaires for the Request that were found as a result of the search profile entered.

It allows the user to either select one of the displayed Questionnaires or to further refine the search criteria and search again.

When a Questionnaire is selected, it will return to the Questionnaire Search Profile form and will populate the 'Questionnaire' field with the selected Questionnaire.

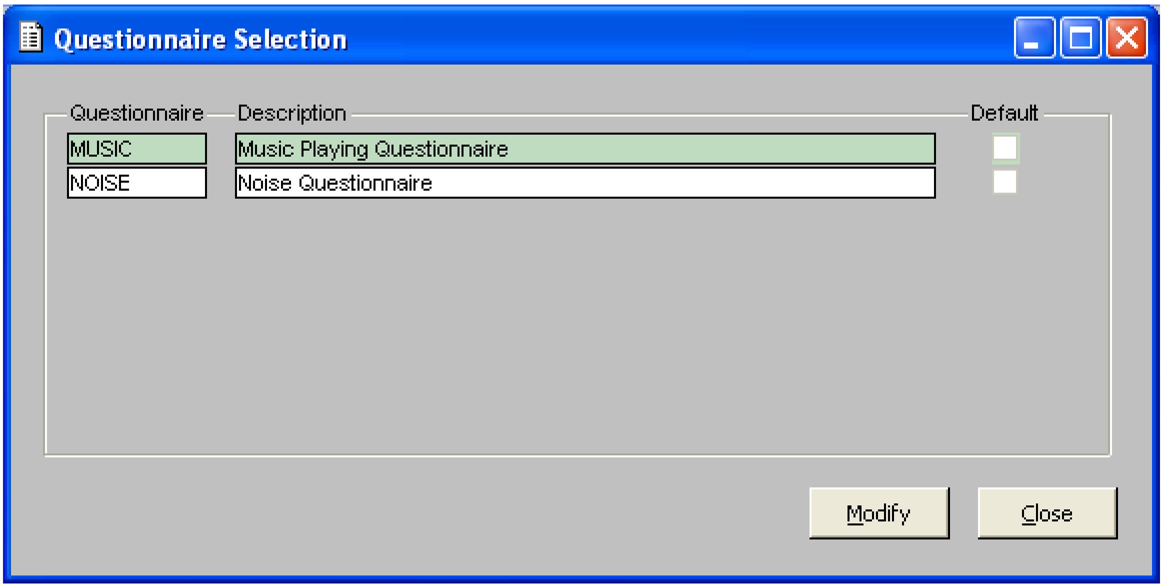



*Questionnaire Pop Up Form*

## Questionnaire Selection Form

Focusing on a Questionnaire and selecting the Modify button will display the Questions for that Questionnaire. If the Questionnaire has not yet been answered, the Questions will be displayed one at a time. Once a question is answered, the next question will display. Once all questions have been answered, the Request Question Maintenance form is displayed.

The Default flag will indicate if a Questionnaire has been flagged as the default Questionnaire.




*Questionnaire Selection form*

## Request Question Maintenance Form

This form displays all questions and their answers.

This form is displayed when the Questionnaires button is pressed on the Request Maintenance form and one or more Questions have been answered. When all the Questions have been answered for a Questionnaire, the message “Questionnaire is complete” will be displayed.

From this form you may press the More Button to insert missing answers. If all Questions have been answered, pressing the More Button will display the message “Questionnaire is Complete”.

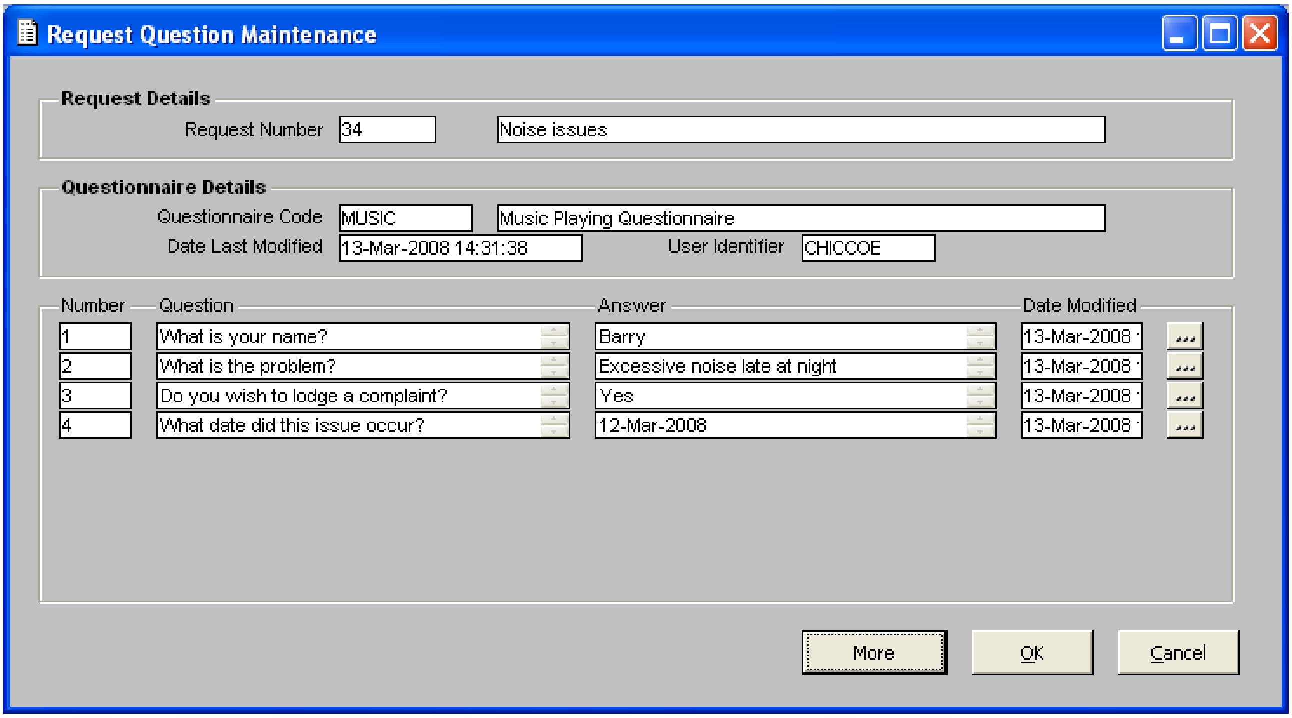
All Questions (and Answers) for the selected Questionnaire will display on this form regardless of whether or not they have been answered. Any Questions that have been skipped (as a result of a Skip To Answer) will be dimmed.

The is a Date Modified field for each Question which keeps a record of the date on which the Answer was last entered/changed.

To delete the Answer to a Question:-

1. Select the Question to be deleted and press the […] Detail button beside it.
   - When the Answer Maintenance form is displayed, take F11 or select Delete from the ‘Edit’ dropdown. This will delete the Answer. The Date Modified will record the date on which the deletion occurred.

> Note: If a Boolean Answer is changed or deleted, the answer to the selected question will be changed/deleted and all the following questions will also be deleted.




*Request Question Maintenance Form*

### Request Details

These fields display the current Request Number and Request Type to which the questionnaire is linked. This field is display only and may not be maintained.

### Questionnaire Details

The selected Questionnaire Code from the previous screen is displayed along with its description.

The Date Last Modified field will contain the most recent date that an Answer to any of the Questions was entered or modified.

The User Identifier field will contain the associated User Id of the User who was responsible for the most recent change.

**Question Number**
This field displays the question number. The number is allocated automatically by Pathway and may not be maintained.

**Question**
This field displays the question text. The Up/Down buttons may be used to display the full Question text if necessary. This field is display only and may not be maintained.

**Answer**
This field displays the answer given by the customer to the question. The Up/Down buttons may be used to display the full Answer text if necessary. This field is display only and may not be maintained.

**Date Modified**
This field will contain the most recent date on which the Answer to the Question was entered or modified.

**Detail Button**
Pressing this button will display the appropriate Answer form where you are able to add, modify or delete an Answer.

Note: To delete the Answer to a Question:- Select the Question to be deleted and press the […] Detail button beside it. When the Answer Maintenance form is displayed, take F11 or select Delete from the 'Edit' dropdown [The Delete Button has been removed].

**More Button**
When this button is pressed, the system will determine all unanswered Questions (taking into account the 'Skip To' values for any Boolean Questions) and present them one at a time to be answered. If all Questions have already been answered, it will simply issue a message saying the Questionnaire is complete.

## Boolean Question Maintenance Form

This form displays when a question is asked that requires a Yes/No type response. It will also be presented if the detail button is pressed on the Question Maintenance form against a "Yes/No" type question.

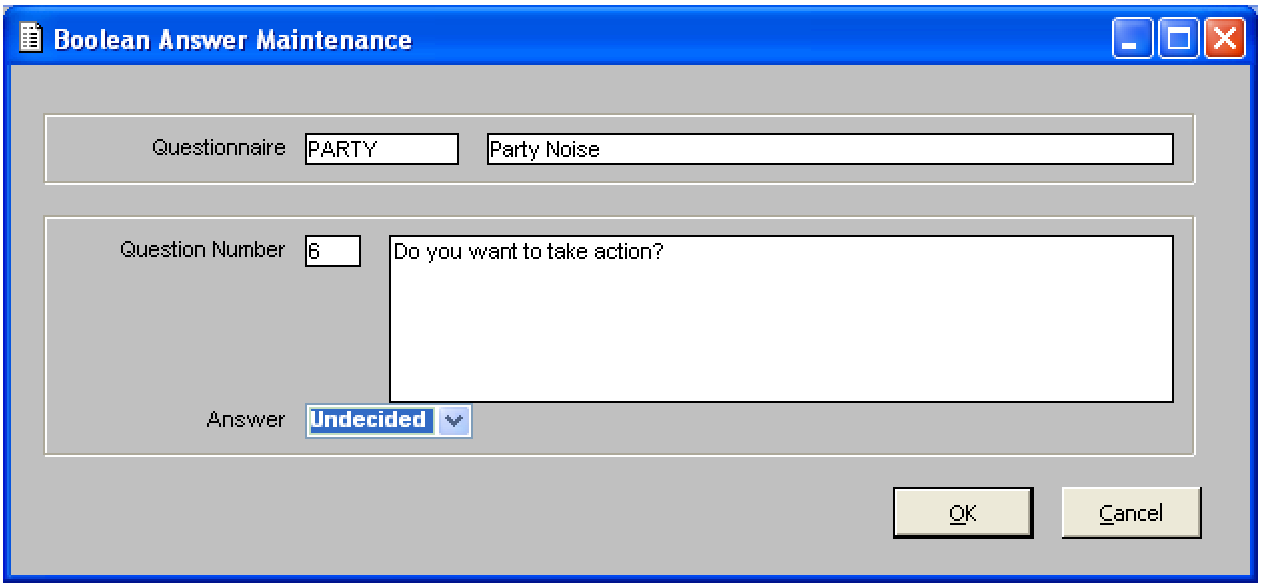
It includes the following features:

- It shows details of the Questionnaire to which the Question belongs.
- It allows the Answer to a Boolean Question to be changed

  NOTE: If the Question has a 'Skip To' Question defined, it will warn that, if the Answer is changed, the Answers to all following Questions will be deleted

- It allows the Answer to a Boolean Question to be deleted

  NOTE: If the Question has a 'Skip To' Question defined, it will warn that, if the Answer is deleted, the Answers to this Question and all following Questions will be deleted




*Boolean Answer Maintenance Form*

**Questionnaire Details**

These fields display the details of the Questionnaire to which the Question belongs.

**Question Details**

These fields display the Question number and the Question text. These details are display only and may not be maintained.

**Answer**

This field requires the entry of a Yes, No or "Undecided" response.

The Answer may be changed or deleted by detailing out.

NOTE: If the Question has a 'Skip To' Answer defined, it will warn that, if the Answer is changed, the Answers to all following Questions will be deleted.

Note: To delete the Answer to a Question:- Select the Question to be deleted and press the […] Detail button beside it. When the Answer Maintenance form is displayed, take F11 or select Delete from the 'Edit' dropdown [The Delete Button has been removed].

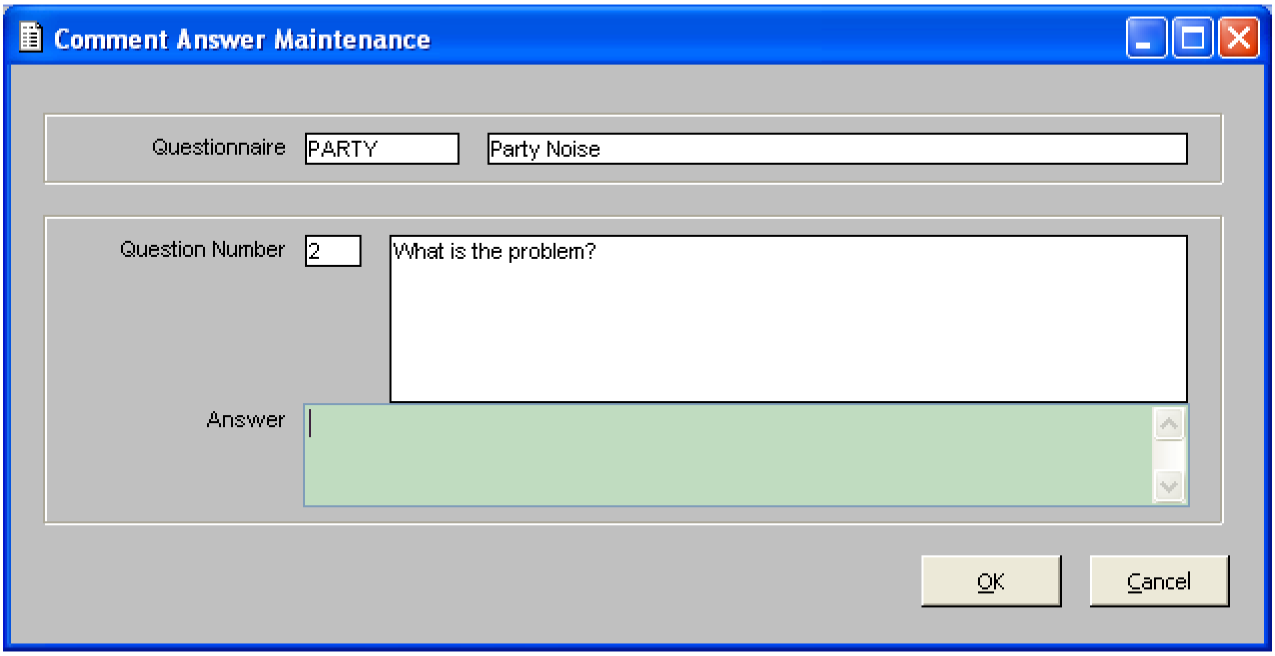
## Comment Answer Maintenance Form

This form displays when a Question is asked that requires a Comment type response which can extend over multiple lines.

It will also be presented if the detail button is pressed on the Question Maintenance form against a "Comment" type question.

It includes the following features:

- It shows details of the Questionnaire to which the Question belongs.
- It also allows the Answer to be deleted or modified.




*Comment Answer Maintenance Form*

**Questionnaire Details**

These fields display the details of the Questionnaire to which the Question belongs.

**Question Details**

These fields display the Question number and the Question text. These details are display only and may not be maintained.

**Answer**

This field allows the entry of an unlimited amount of text in response to the question.

A Comment type Answer may be deleted or modified by detailing out using the Detail Button.

Note: To delete the Answer to a Question:- Select the Question to be deleted and press the […] Detail button beside it. When the Answer Maintenance form is displayed, take F11 or select Delete from the 'Edit' dropdown [The Delete Button has been removed].

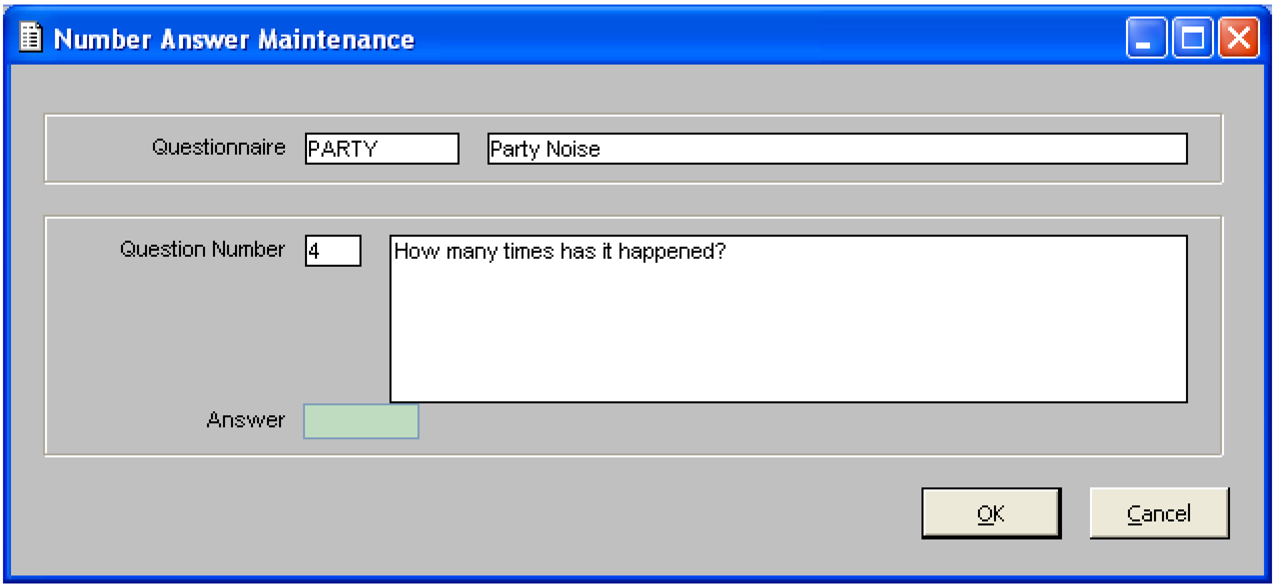
## Number Answer Maintenance Form

This form displays when a question is asked that requires a Number type response.

It will also be presented if the detail button is pressed on the Question Maintenance form against a "Number" type question.

It includes the following features:

- It shows details of the Questionnaire to which the Question belongs.
- It also allows the Answer to be deleted or modified.




*Number Answer Maintenance Form*

**Questionnaire Details**

These fields display the details of the Questionnaire to which the Question belongs.

**Question Details**

These fields display the Question number and the Question text. These details are display only and may not be maintained.

**Answer**

This field allows the entry of a number in response to the question.

A Number type Answer may be deleted or modified by detailing out using the Detail Button.

Note: To delete the Answer to a Question:- Select the Question to be deleted and press the […] Detail button beside it. When the Answer Maintenance form is displayed, take F11 or select Delete from the 'Edit' dropdown [The Delete Button has been removed].

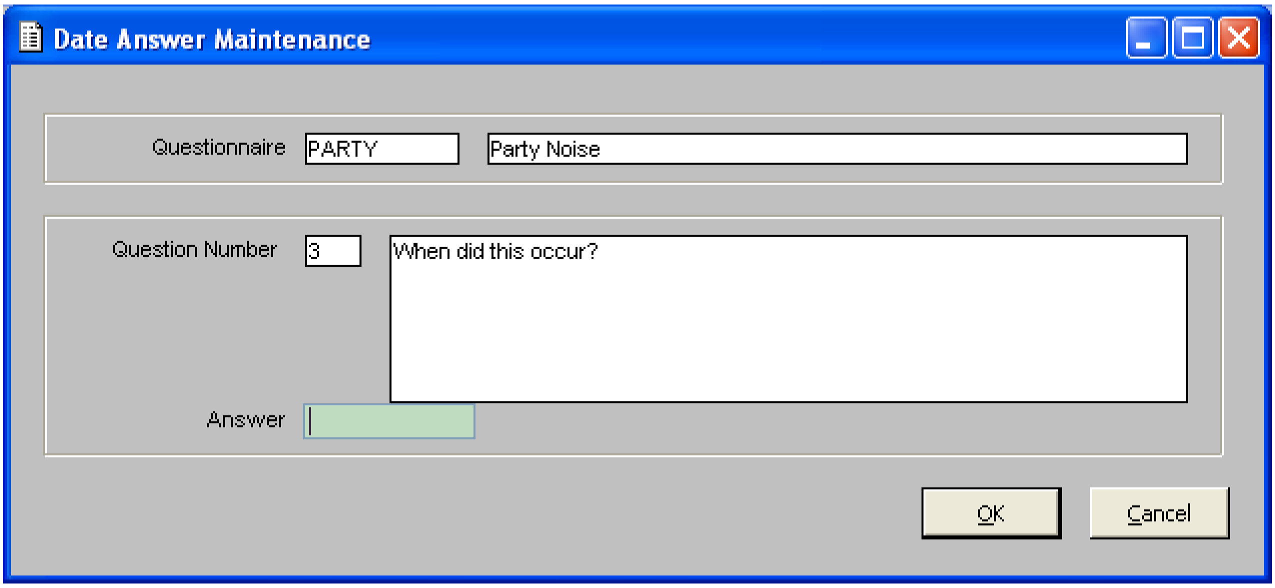
## Date Answer Maintenance Form

This form displays when a question is asked that requires a Date type response.

It will also be presented if the detail button is pressed on the Question Maintenance form against a "Date" type question.

It includes the following features:

- It shows details of the Questionnaire to which the Question belongs.
- It also allows the Answer to be deleted or modified.




*Date Answer Maintenance Form*

**Questionnaire Details**

These fields display the details of the Questionnaire to which the Question belongs.

**Question Details**

These fields display the Question number and the Question text. These details are display only and may not be maintained.

**Answer**

This field allows the entry of a Date in response to the question.

A Date type Answer may be deleted or modified by detailing out using the Detail Button.

Note: To delete the Answer to a Question:- Select the Question to be deleted and press the […] Detail button beside it. When the Answer Maintenance form is displayed, take F11 or select Delete from the 'Edit' dropdown [The Delete Button has been removed].

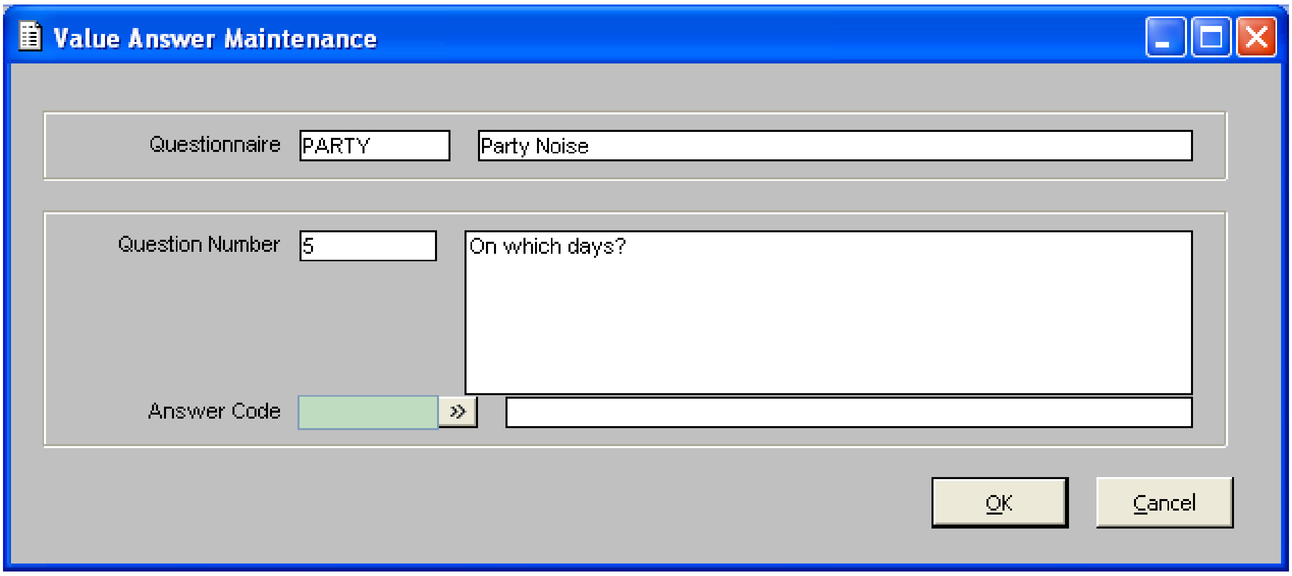
## Value Answer Maintenance Form

This form displays when a Question is asked that requires a selection to be made from a list of Values.

It will also be presented if the Detail button is pressed on the Question Maintenance form against a 'Value' type question.

It includes the following features:

- It shows details of the Questionnaire to which the Question belongs.
- It also allows the Answer to be deleted or modified.




*Value Answer Maintenance form*

**Questionnaire Details**

These fields display the details of the Questionnaire to which the Question belongs.

**Question Details**

These fields display the Question number and the Question text.  These details are display only and may not be maintained.

**Answer Code**

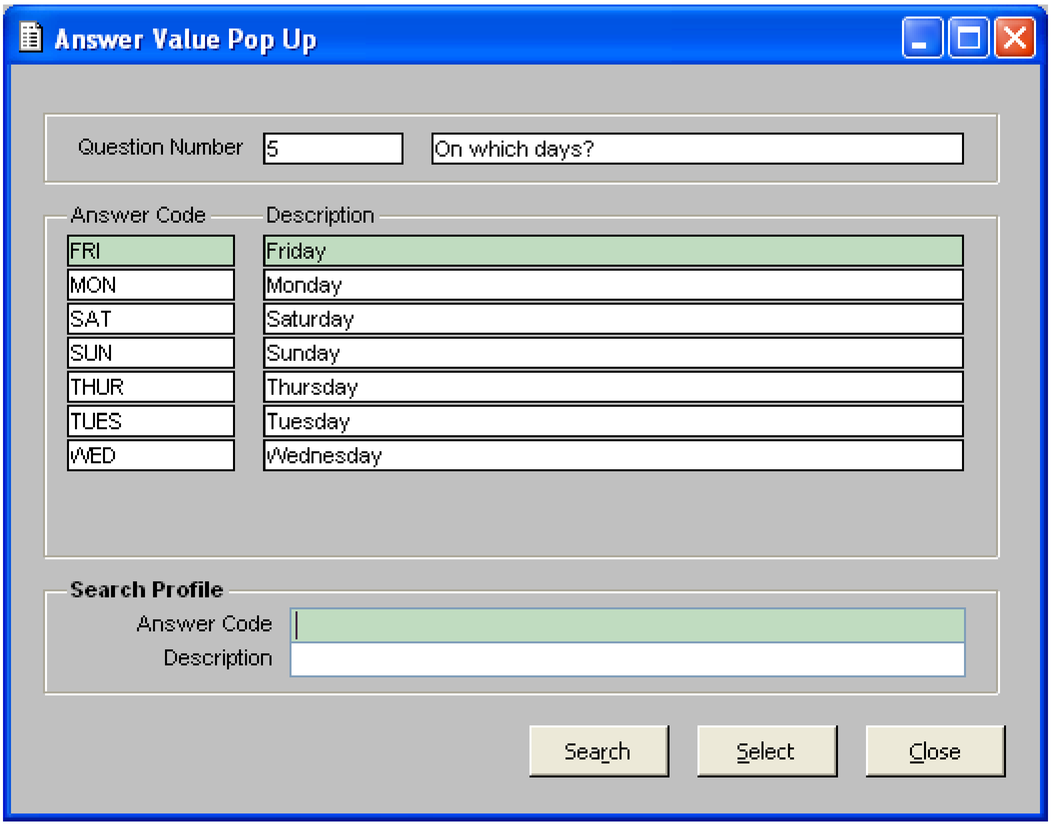
The Answer Code field allows a valid Answer to be keyed in or selected from the Pop Up.  The list of values presented in the Pop Up are set up in Questionnaire parameters.

A Value type Answer may be deleted or modified by detailing out using the Detail Button.

Note:  To delete the Answer to a Question:- Select the Question to be deleted and press the […] Detail button beside it.  When the Answer Maintenance form is displayed, take F11 or select Delete from the 'Edit' dropdown  [The Delete Button has been removed].

## Answer Value Pop Up Form

The Answer Value Pop Up allows the user to select a value from the displayed list in answer to the question. A search Profile is available to allow easy searching in the case of more than 9 values being available.



*Answer Value Pop Up form*

## Single Line Answer Maintenance Form

This form displays when a Question is asked that requires a Single Line type response.

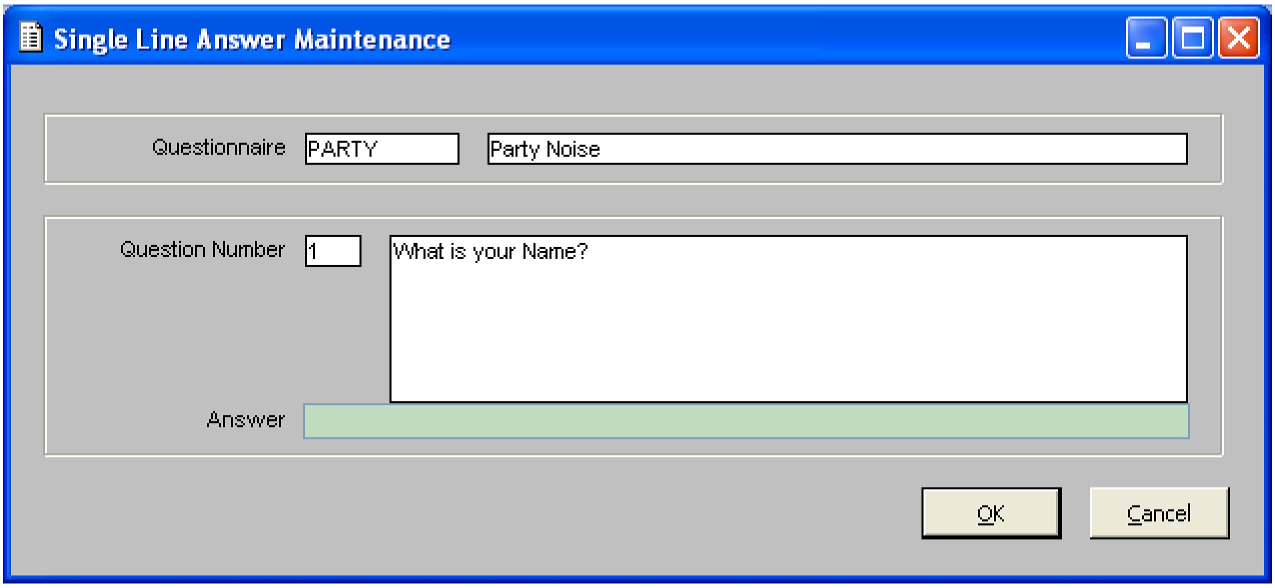
It will also be presented if the detail button is pressed on the Question Maintenance form against a “Single Line” type question.

The ‘Single Line’ Answer type can now be used as an alternative to the existing ‘Comment’ Answer type.

Note: The ‘Comment’ field is a multi-line ‘memo’ field which ePathway renders as a ‘Memo’ (multi-line) text box on the web page. The ‘Single Line’ question type by contrast will be a straight 50 character ‘string’ entry field.

It includes the following features:

- It shows details of the Questionnaire to which the Question belongs.
- It also allows the Answer to be deleted or modified.




*Single Line Answer Maintenance form*

**Questionnaire Details**
These fields display the details of the Questionnaire to which the Question belongs.

**Question Details**
These fields display the Question number and the Question text. These details are display only and may not be maintained.

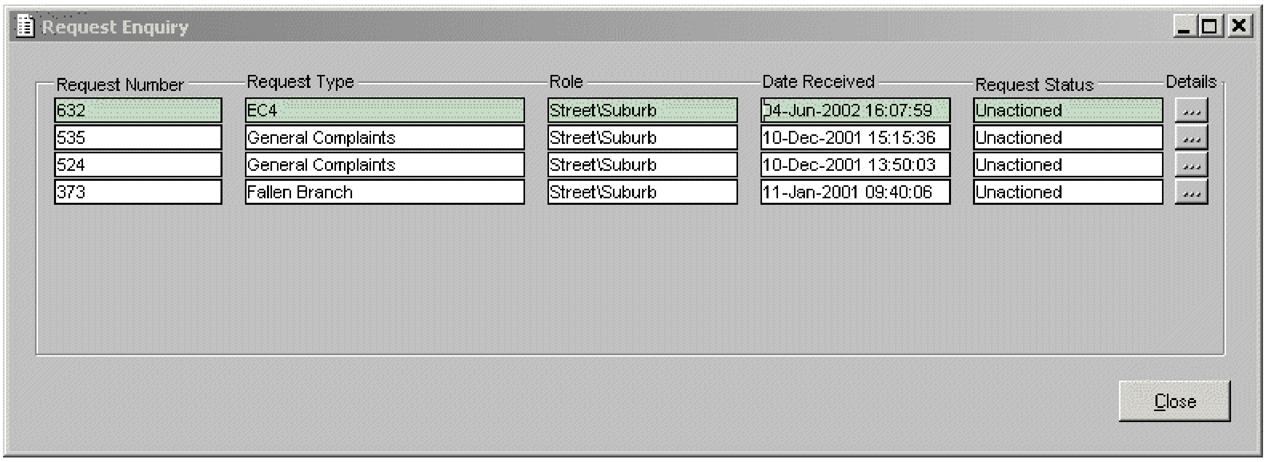
**Answer**
This field allows the entry of a single line 50 character string of text in response to the question.

A Single Line type Answer may be deleted or modified by detailing out using the Detail Button.

Note: To delete the Answer to a Question:- Select the Question to be deleted and press the […] Detail button beside it. When the Answer Maintenance form is displayed, take F11 or select Delete from the 'Edit' dropdown [The Delete Button has been removed].

## Request Enquiry Form

This form is displayed when a request is made from another application (say Animal Registrations) to view all Customer Requests for that particular record. This form displays all Customer Service links to that record.




*Request Enquiry Form*

**Request Number**
This field displays the number of the customer service record that is linked to the external record. This field is display only and may not be maintained.

**Request Type**
This field displays the description of the type of request. E.g. Wandering Dog, Barking Dog. This field is display only and may not be maintained.

**Role**
The Role Description field displays the Role Type of the link. This field is display only and may not be maintained.

**Date Received**
This field displays the date and time the customer request was received. This field is display only and may not be maintained.

**Request Status**
This field displays the status of the customer request. This field is display only and may not be maintained.

**Detail Button**
Pressing this button will take the user to the specific Customer Request record. The customer request record will not be maintainable.

# Associated Requests

Associated Requests are requests that are linked due to dependencies between Requests. e.g.: A Request by a customer requires two departments to perform tasks and each department requires their own request.

Selecting the Associated Links option from the Options Menu on the toolbar will allow a user to select an existing Request or create a new Request to associate.

Selecting an existing Request will link the request as an associated request and not update any details against the selected request. In addition, Requests which have been flagged as Primary Requests (linked through the Primary/Secondary function) within the system will be able to be linked as Associated Requests. Secondary Requests will **not** be able to be selected to be Associated Requests.

Selecting 'New' will create a new Request. The new Request will have the parent Request details copied across, following the rules associated with the 'Copy' function available, i.e. this will copy across Module links, Contact Type and Requestor Type details. 'Notes' information will not be copied across and the officer raising the Request will be required to add the required Note details to the request, as it is assumed that the Note details on the new Request will be specific to the action required for the Request being raised.

Any Request that has been linked as an Associated Request can have Associated Requests linked to it as well. An Associated Request will be able to be made into a Primary Request, having Secondary Requests linked to it, but will not be able to be linked as a Secondary Request.

An additional field, 'Allow Completion', is available against the Parent Request in an Associated Request relationship to allow the user to nominate whether the Parent Request can be closed if associated Requests are still open. By default this option will be set on to allow the completion of the request, independently of any Associated Requests.

If Allow Completion is off then a completion status is not able to be applied until all Associated Requests have been completed. This check is only performed at the first level of Associated Requests,. i.e. where there are Associated Requests to Associated Requests then the secondary level will not be checked to see if they are completed.

> Note: The 'Allow Completion' option does not override the setting at the Request Type level relating to Tasks requiring completion for the Request to be able to be completed.

A Request will be able to be associated to more than one request e.g. a Request was logged requesting that the footpath be repaired due to tree root damage. An additional request was logged requesting repair of a hole on the same footpath. A third request is raised that is allocated to the work crew to repair the footpath. This third request is linked to both requests that were raised as the one job will address the repair of the footpath for both reported issues.

An option is also available to allow the user to de-associate Associated Requests.

## Associated Links

Requests are able to be linked together via the Associated Links option on the Options Dropdown Menu. Clicking this option will display the following sub-options:

- Child Associated Link(s)
- Parent Associated Link(s)

> Note: If the open Request is a Secondary Request, it is not available to be linked and so the Parent and Child Associated Link (s) options will be dimmed.

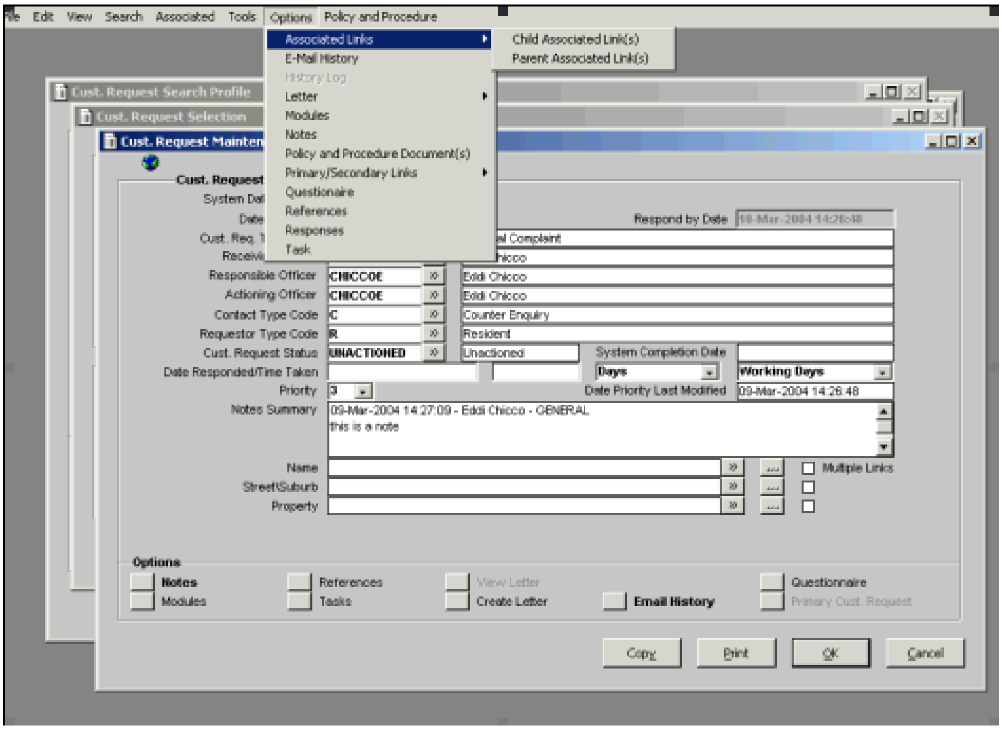
The following rules will apply when you attempt to associate a Request:

- If you select the calling Request you will get an error message
- If you select a Secondary Request you will get an error message

- If an Associated Request loop is going to be formed you will get en error message,

e.g.
Request A1 is the Child Associated Request to Request A3
Request A3 is the Child Associated Request to Request A2
If a new associated link between A1 and A2 is to be created ( i.e. Request A1 is to be the parent of Request A2) then an associated loop will be formed.

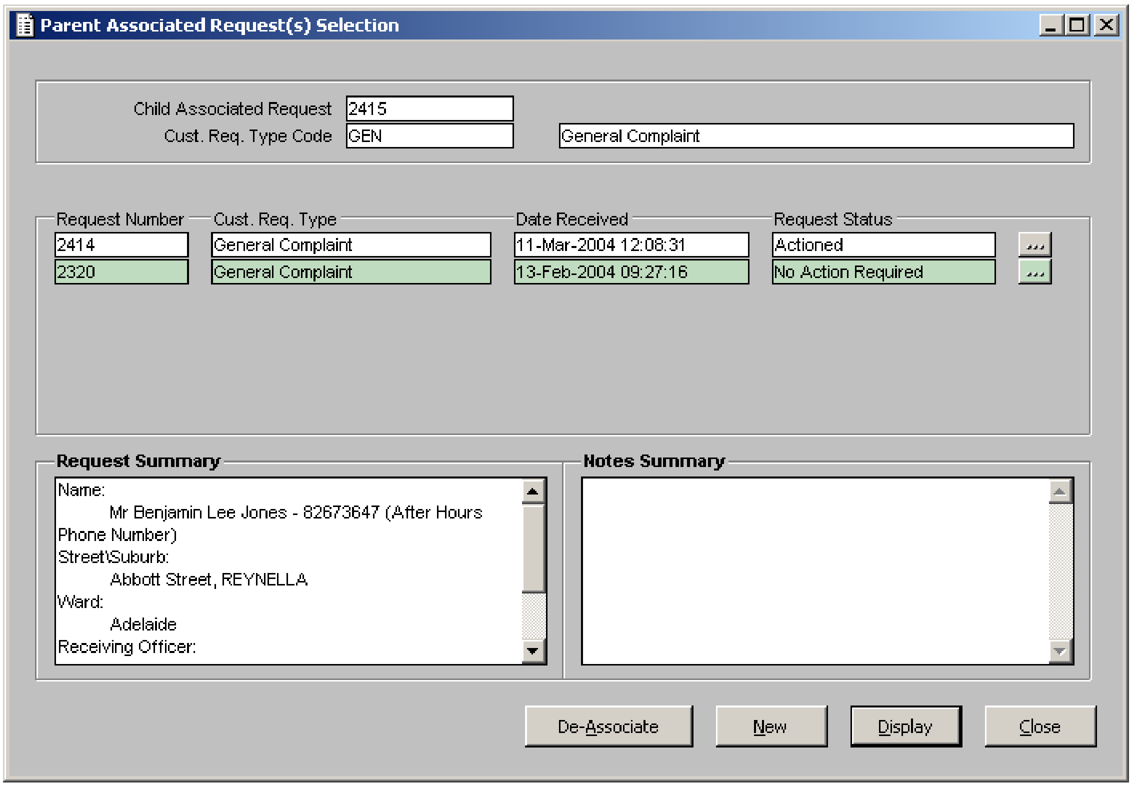
- Once an Associate Link is created you are able to change the Allow Completion flag which is defaulted to True. If this flag is ON, it means that the Parent Associated Request can be completed regardless of the Child Associated Request's status. If the flag is OFF, the Parent Associated Request cannot be completed if there are any outstanding Child Associated Requests.




## Parent Associated Request(s) Selection Form

This form displays when the Associated Links>>Parent Associated Link(s) option is selected from the Options Dropdown Menu. It shows Request 2404 as a Child Associated Request of Request 2391. Request 2391 being the Parent Associated Request.

Note: Request 2404 is not able to be linked as a Secondary Request now that it has been associated with other Requests




**Child Associated Request**
This field displays the current Request Number labelled as the Child Associated Request to all the Requests listed below (which are Parent Associated Requests).

**Request Type Code**
This field displays the Request Type Code and Description for the current Request.

**Request Number**
This field displays the Request Number of any Parent Associated Requests linked to the current Request.

**Request Type**
This field displays the Request Type of any Parent Associated Requests linked to the current Request.

**Date Received**
This field displays the Date Received of any Parent Associated Requests linked to the current Request.

**Request Status**
This field displays the Request Status of any Parent Associated Requests linked to the current Request.

**Detail Button**
Selecting the Detail button will display the Associated Request Details form where the Allow Completion flag may be maintained.

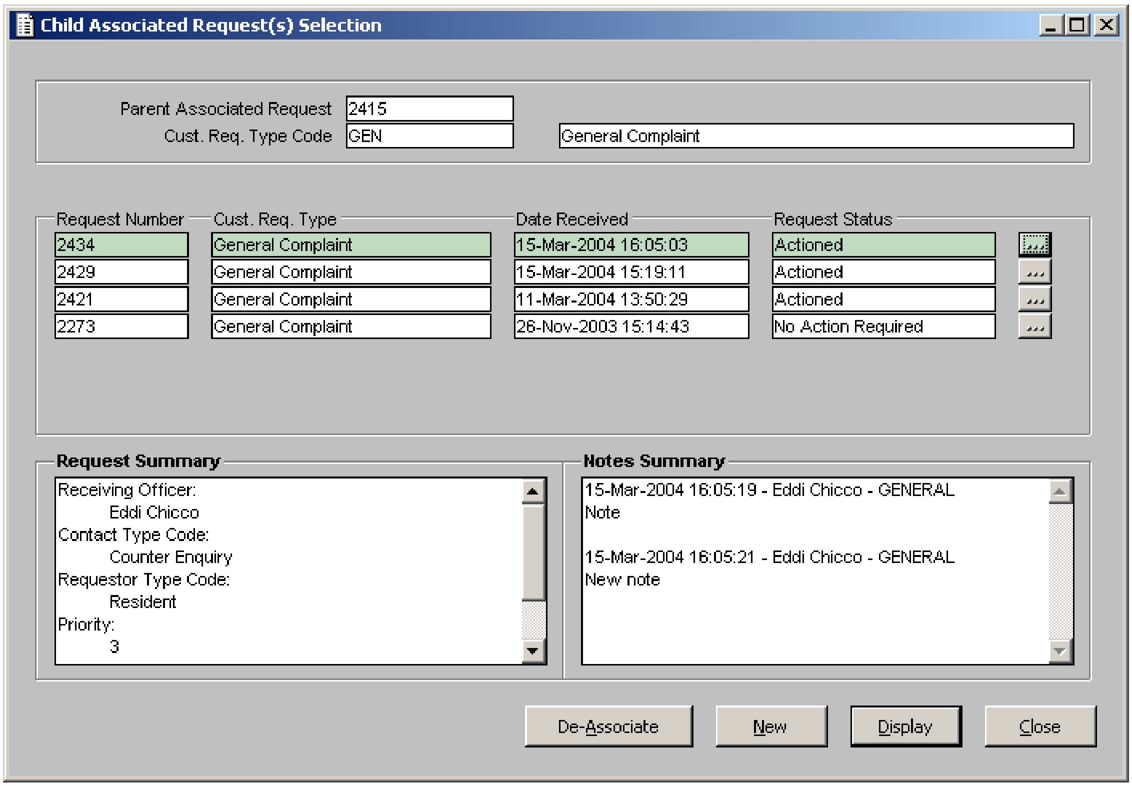
**Request Summary**
This summary box displays summary Request details for the Parent Associated Request which has focus.

**Notes Summary**
The Notes Summary box displays Notes details for the Parent Associated Request which has focus.

**De-Associate Button**
Selecting the De-Associate Button allows the user to de-associate the Request which has focus. This removes the link from the two Requests. If an Associated Request has Associated Requests, then the Associated Requests will remain with the de-associated Request, e.g. Request A1 has an associated Request A2, and A2 has associated Requests A3 and A4. De-associating Request A1 from A2 will not de-associate Requests A3 and A4.

## Child Associated Request Selection Form

This form displays when the Associated Links>>Child Associated Link(s) option is selected from the Options Dropdown Menu.




**Parent Associated Request**
This field displays the current Request Number labelled as the Parent Associated Request to all the Requests listed below (which are Child Associated Requests)

**Request Type Code**
This field displays the Request Type Code and Description for the current Request.

**Request Number**
This field displays the Request Number of any Child Associated Requests linked to the current (Parent) Request.

**Request Type**
This field displays the Request Type of any Child Associated Requests linked to the current (Parent) Request.

**Date Received**
This field displays the Date Received of any Child Associated Requests linked to the current(Parent) Request.

**Request Status**
This field displays the Request Status of any Child Associated Requests linked to the current (Parent) Request.

**Detail Button**
Selecting the Detail button will display the Associated Request Details form where the Allow Completion flag may be maintained.

**Request Summary**
This summary box displays summary Request details for the Child Associated Request which has focus.

**Notes Summary**

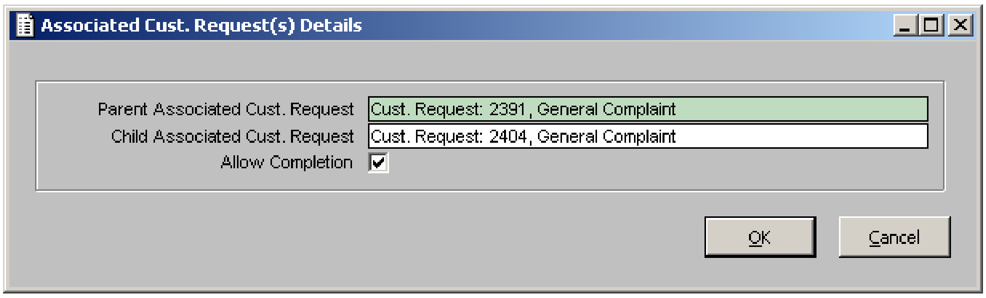
The Notes Summary box displays Notes details for the Child Associated Request which has focus.

**De-Associate Button**

Selecting the De-Associate Button allows the user to de-associate the Request which has focus. This removes the link from the two Requests. If an Associated Request has Associated Requests, then the Associated Requests will remain with the de-associated Request, e.g. Request A1 has an associated Request A2, and A2 has associated Requests A3 and A4. De-associating Request A1 from A2 will not de-associate Requests A3 and A4.

## Associated Request Details Form

This form displays the relationship between the Parent and Child Associated Requests and allows the ‘Allow Completion’ flag to be set.




**Parent Associated Request**

This field displays details of the Parent Associated Request which is linked to the Child Associated Request.

**Child Associated Request**

This field displays details of the Child Associated Request which is linked to the Parent Associated Request.

**Allow Completion**

The ‘Allow Completion’ flag allows the user to nominate whether the Parent Request can be closed if associated requests are still open. By default this flag will be set ON to allow the completion of a request, independently of any Associated Requests.

If ‘Allow Completion is OFF then a completion status will not be able to be applied until all Associated Requests have been completed. This check will only be performed at the first level of Associated Requests, i.e. where there are Associated Requests to Associated Requests then the secondary level will not be checked to see if they are completed.

> Note: The ‘Allow Completion’ flag will not override the setting at the Request type level relating to Tasks requiring completion for the Request to be able to be completed.

# Request History

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

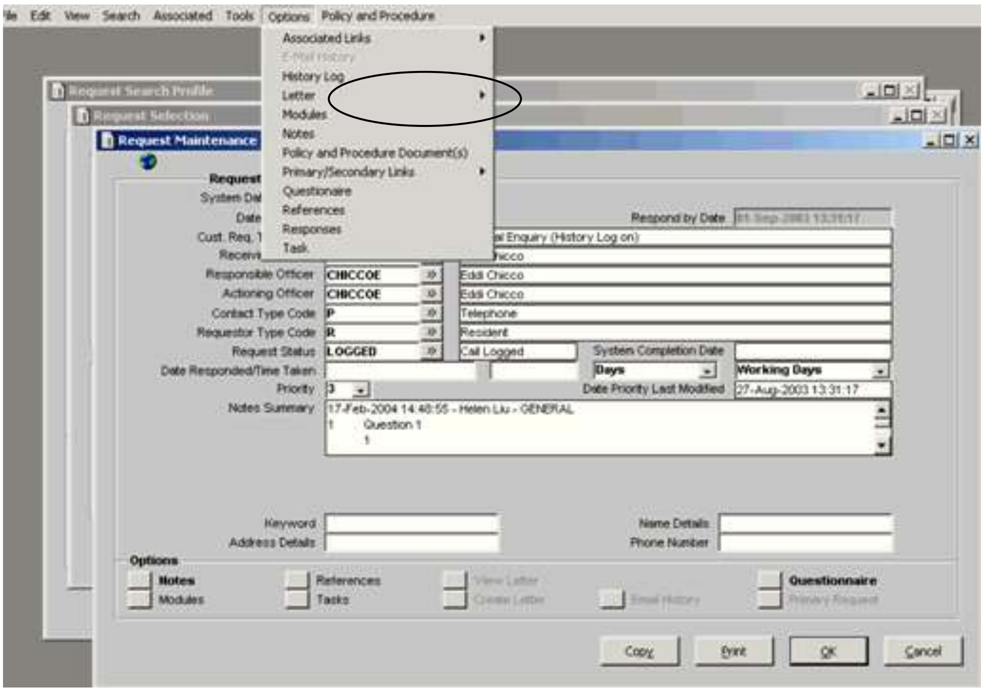
Customer Service allows the retention of a history of user- and system-initiated actions against a Request. The available actions are Infor-defined, but it is possible for sites to nominate which ones are recorded.

This facility is augmented with added security to enable control over the level of summary information that is displayed on the Request Selection form (and others). This ensures that users cannot get access to sensitive Request details via Summary displays. The action of viewing the information via the specific maintenance or enquiry form is logged at the discretion of customer sites, providing more information about when information has been viewed, and by whom.

As soon as the ‘Active’ flags are set on in ‘History Log Action Maintenance’, actions start to be logged. Then, in order to view the Request History Log, the secure function of ‘Access Request History Log’ must be assigned to the relevant user (in Request Type Parameters). This will provide access to the ‘History Log’ option from the Options menu.

Note: Unlike other Secured Function Codes, the default action for the ‘Access Request History Log’ function is to disallow access, so it is necessary to explicitly grant user authority to this function.

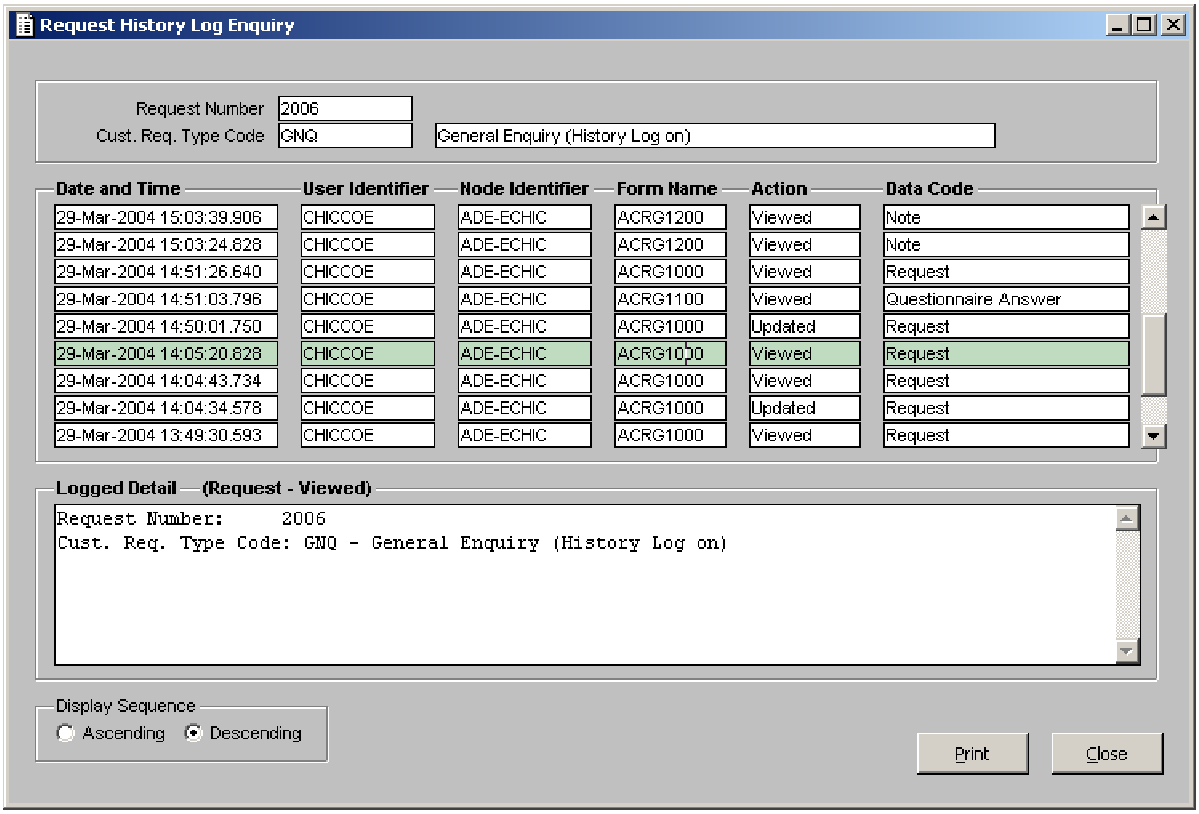
(Refer to further information in the Parameters section - 257)




## Request History Log Enquiry Form

The Request History Log Enquiry Form is accessed via the ‘Options’ Menu Bar drop down menu via the ‘History Log’ option which is available when the user is authorised via the Secured Function code “Customer Service History Logging”. It displays the details of all logged actions for the selected Request. The top section of the form lists the various log actions recorded for the Request. The lower section displays the recorded detail for the highlighted log entry. The values displayed in the ‘Logged Detail’ summary will vary depending on the type of ‘Action’ and the ‘Data Code’.

History Log details cannot be directly maintained or deleted by the user. However, all log entries associated with a Request will be deleted when the Request itself is deleted.



Request History Log Enquiry

Request Number: 2006
Cust. Req. Type Code: GNQ — General Enquiry (History Log on)

| Date and Time | User Identifier | Node Identifier | Form Name | Action | Data Code |
|---|---|---|---|---|---|
| 29-Mar-2004 15:03:39.906 | CHICCOE | ADE-ECHIC | ACRG1200 | Viewed | Note |
| 29-Mar-2004 15:03:24.828 | CHICCOE | ADE-ECHIC | ACRG1200 | Viewed | Note |
| 29-Mar-2004 14:51:26.640 | CHICCOE | ADE-ECHIC | ACRG1000 | Viewed | Request |
| 29-Mar-2004 14:51:03.796 | CHICCOE | ADE-ECHIC | ACRG1100 | Viewed | Questionnaire Answer |
| 29-Mar-2004 14:50:01.750 | CHICCOE | ADE-ECHIC | ACRG1000 | Updated | Request |
| 29-Mar-2004 14:05:20.828 | CHICCOE | ADE-ECHIC | ACRG1000 | Viewed | Request |
| 29-Mar-2004 14:04:43.734 | CHICCOE | ADE-ECHIC | ACRG1000 | Viewed | Request |
| 29-Mar-2004 14:04:34.578 | CHICCOE | ADE-ECHIC | ACRG1000 | Updated | Request |
| 29-Mar-2004 13:49:30.593 | CHICCOE | ADE-ECHIC | ACRG1000 | Viewed | Request |

Logged Detail (Request - Viewed)

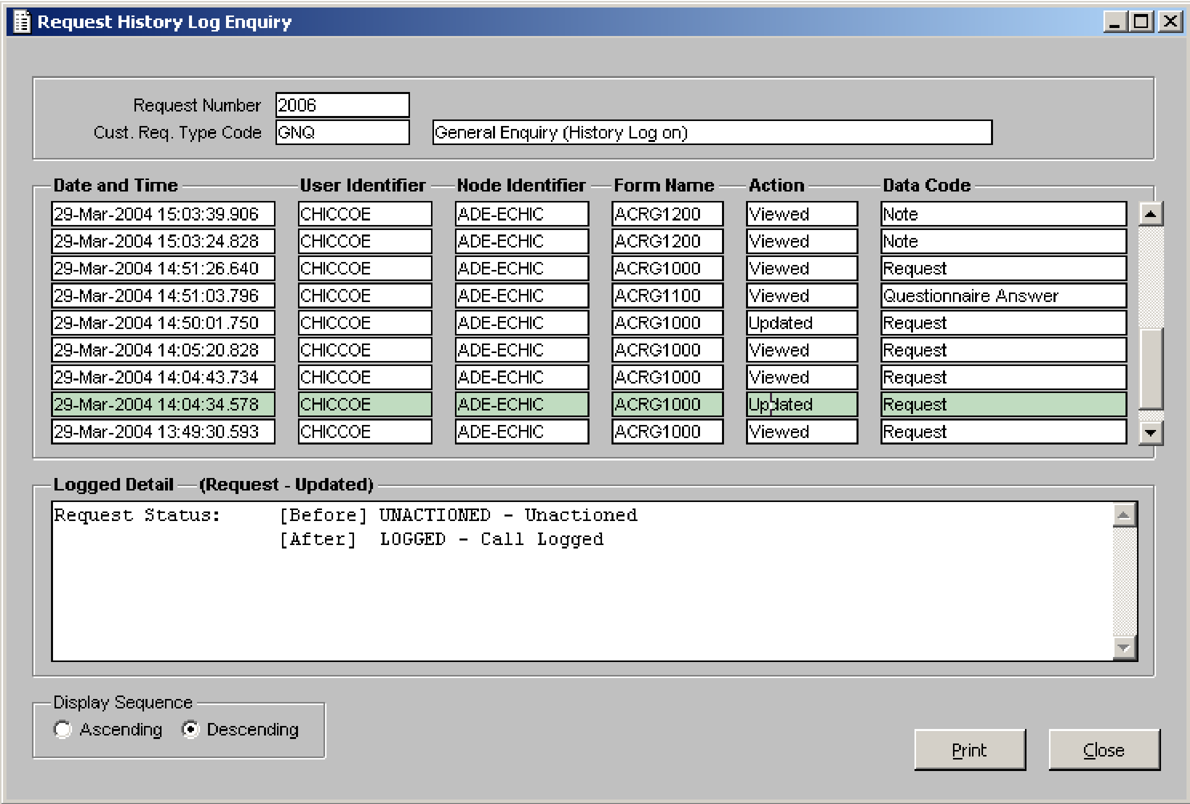
Request Number: 2006
Cust. Req. Type Code: GNQ - General Enquiry (History Log on)

Display Sequence: Ascending / Descending

Print Close

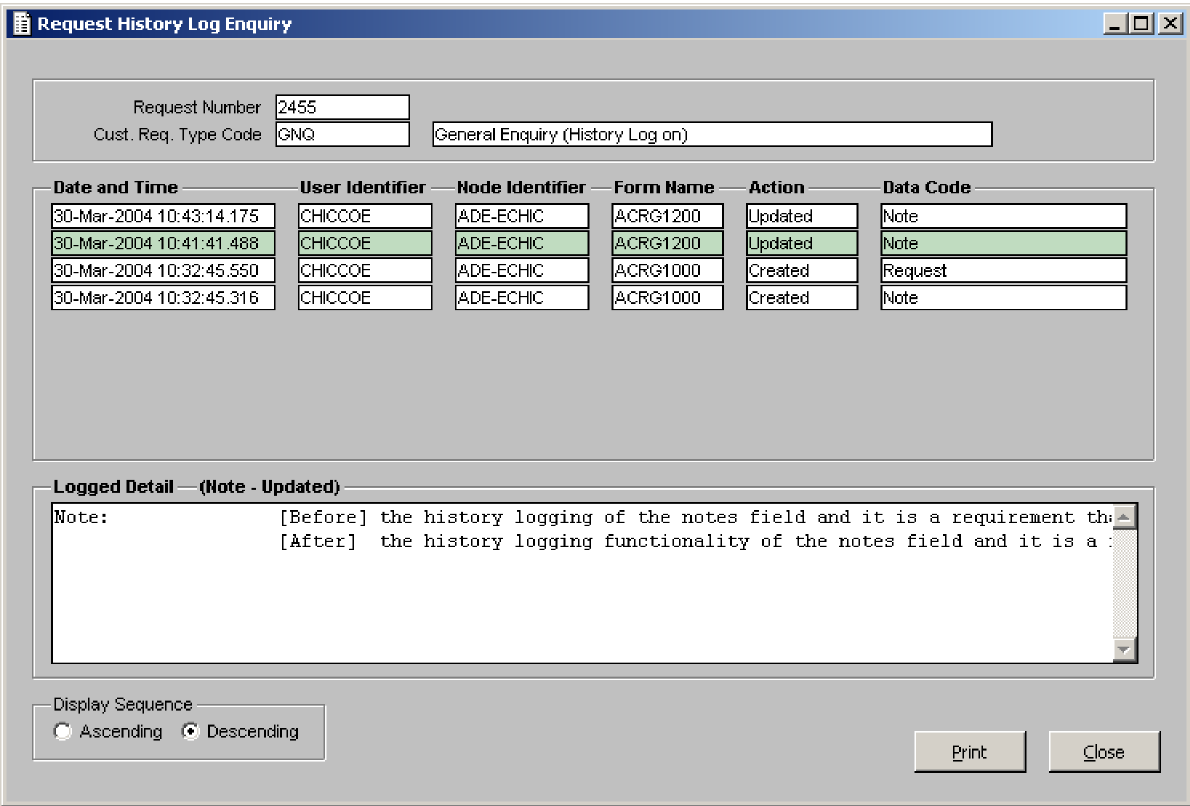
*Request History Log Enquiry form*

The detail display is made up of the recorded ‘Field Label’ and its associated value. In the case of an ‘Update’ action, the values recorded will display with a [Before] and [After] component, e.g.



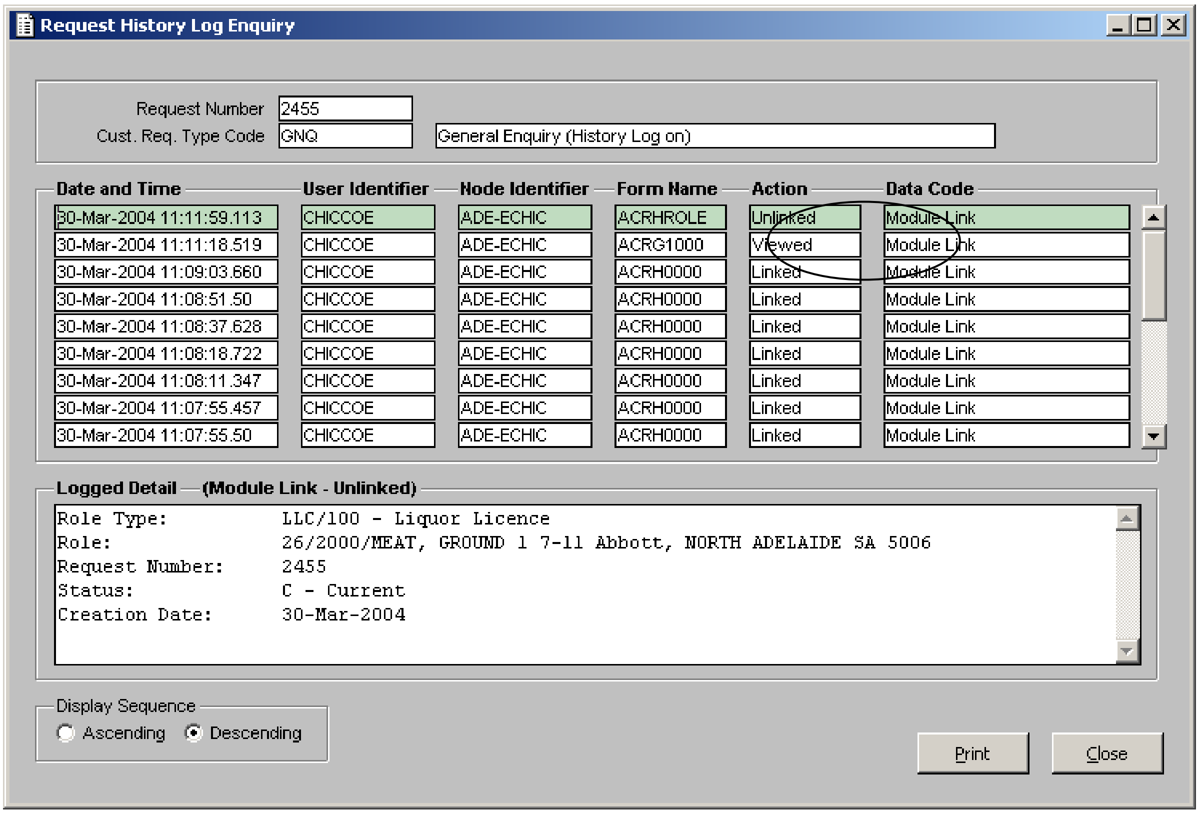

*Request History Log Enquiry form showing Summary details for an Update Action*

History logging for the Notes field will be recorded when any details are entered of modified in a Note. Up to 100 characters of the Note will be displayed on a single line. The Logged Detail Summary box will show the [Before] and [After] details from around the area of the first change made in the Note.




*Request History Log Enquiry showing Note details*

When a Module Link record is deleted (using F11) the History Logging action will be ‘Unlinked’.



Request History Log Enquiry

Request Number 2455

Cust. Req. Type Code GNQ General Enquiry (History Log on)

| Date and Time | User Identifier | Node Identifier | Form Name | Action | Data Code |
|---|---|---|---|---|---|
| 30-Mar-2004 11:11:59.113 | CHICCOE | ADE-ECHIC | ACRHROLE | Unlinked | Module Link |
| 30-Mar-2004 11:11:18.519 | CHICCOE | ADE-ECHIC | ACRG1000 | Viewed | Module Link |
| 30-Mar-2004 11:09:03.660 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |
| 30-Mar-2004 11:08:51.50 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |
| 30-Mar-2004 11:08:37.628 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |
| 30-Mar-2004 11:08:18.722 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |
| 30-Mar-2004 11:08:11.347 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |
| 30-Mar-2004 11:07:55.457 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |
| 30-Mar-2004 11:07:55.50 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |

Logged Detail (Module Link - Unlinked)

```
Role Type:          LLC/100 - Liquor Licence
Role:               26/2000/MEAT, GROUND 1 7-11 Abbott, NORTH ADELAIDE SA 5006
Request Number:     2455
Status:             C - Current
Creation Date:      30-Mar-2004
```

Display Sequence

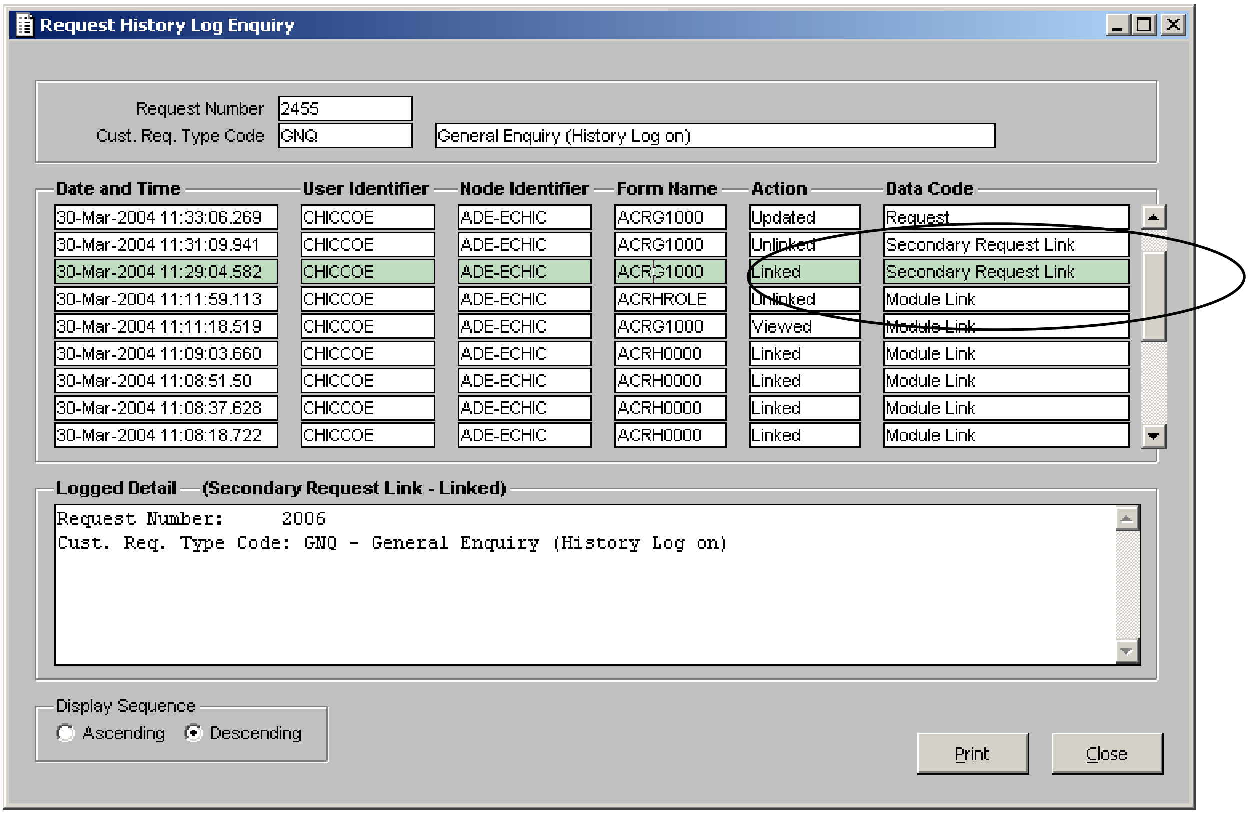
Ascending Descending

Print Close

*Request History Log Enquiry form showing an Unlinked Module Link*

When a Secondary Request is linked to a Request, the History Log details are recorded on the Primary Request. The entry will detail the Request Number of the linked Secondary Request.

Note: If the current Request is linked to another Request as a Secondary Request (i.e. the other Request is the Primary Request), then the History Log details will not be recorded on the current Request. The Primary Request will have a History Log record against it.



Request History Log Enquiry

Request Number 2455

Cust. Req. Type Code GNQ General Enquiry (History Log on)

| Date and Time | User Identifier | Node Identifier | Form Name | Action | Data Code |
|---|---|---|---|---|---|
| 30-Mar-2004 11:33:06.269 | CHICCOE | ADE-ECHIC | ACRG1000 | Updated | Request |
| 30-Mar-2004 11:31:09.941 | CHICCOE | ADE-ECHIC | ACRG1000 | Unlinked | Secondary Request Link |
| 30-Mar-2004 11:29:04.582 | CHICCOE | ADE-ECHIC | ACRG1000 | Linked | Secondary Request Link |
| 30-Mar-2004 11:11:59.113 | CHICCOE | ADE-ECHIC | ACRHROLE | Unlinked | Module Link |
| 30-Mar-2004 11:11:18.519 | CHICCOE | ADE-ECHIC | ACRG1000 | Viewed | Module Link |
| 30-Mar-2004 11:09:03.660 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |
| 30-Mar-2004 11:08:51.50 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |
| 30-Mar-2004 11:08:37.628 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |
| 30-Mar-2004 11:08:18.722 | CHICCOE | ADE-ECHIC | ACRH0000 | Linked | Module Link |

Logged Detail (Secondary Request Link - Linked)

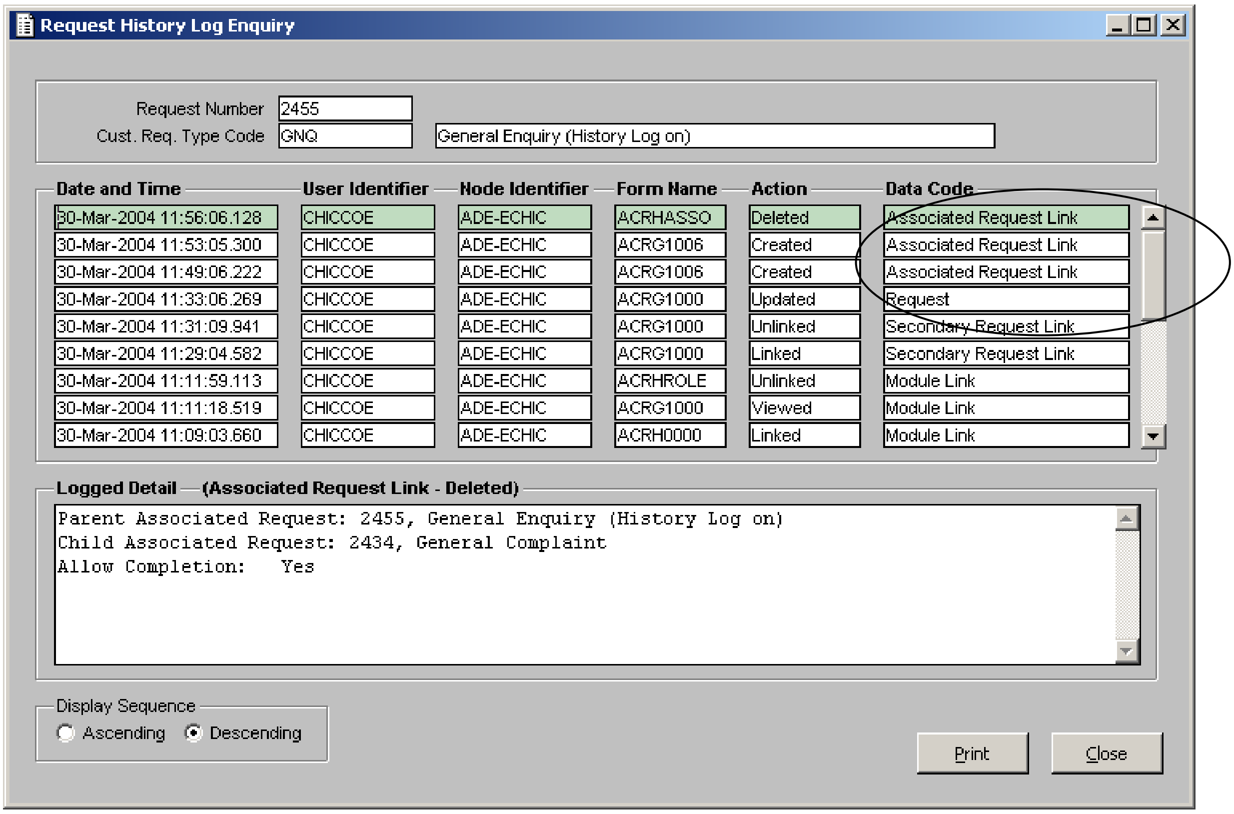
Request Number: 2006
Cust. Req. Type Code: GNQ - General Enquiry (History Log on)

Display Sequence
Ascending Descending

Print Close

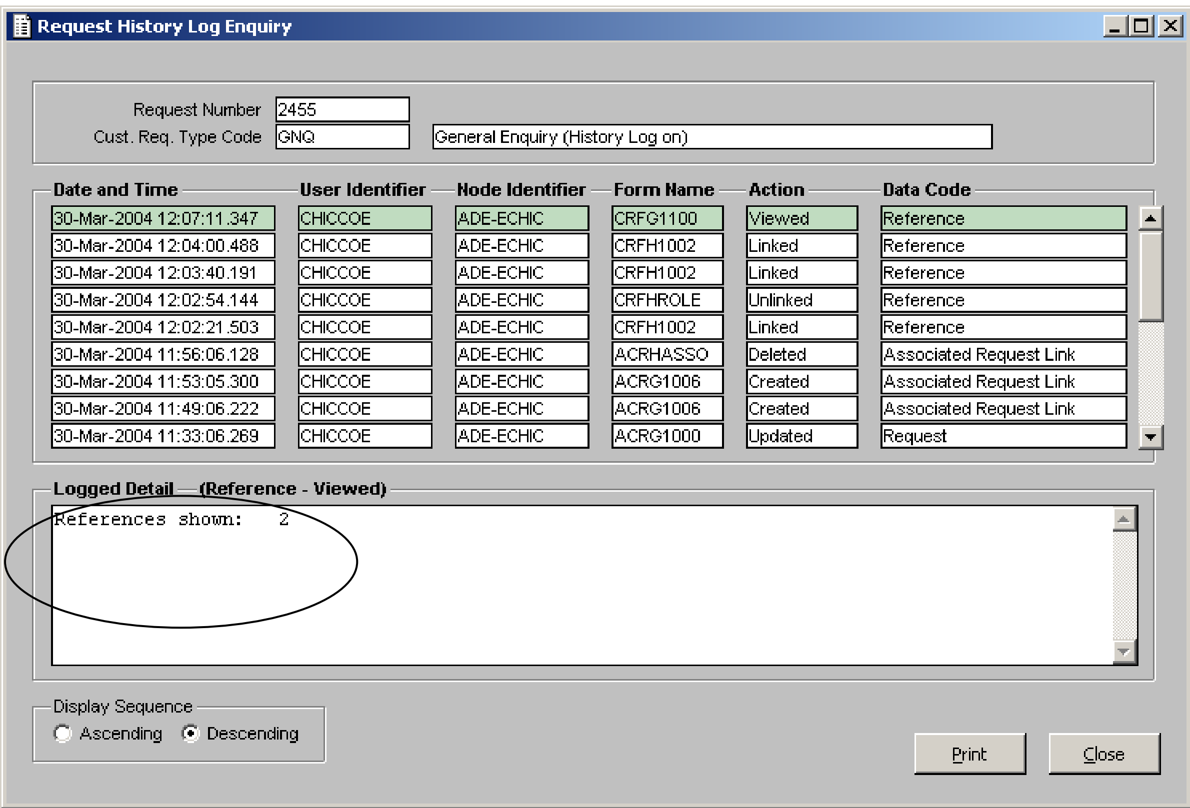
*Request History Log Enquiry form showing Secondary Request Link*

As with Primary/Secondary Links, Associated Parent/Child Links are logged against the ‘Parent’ Request.



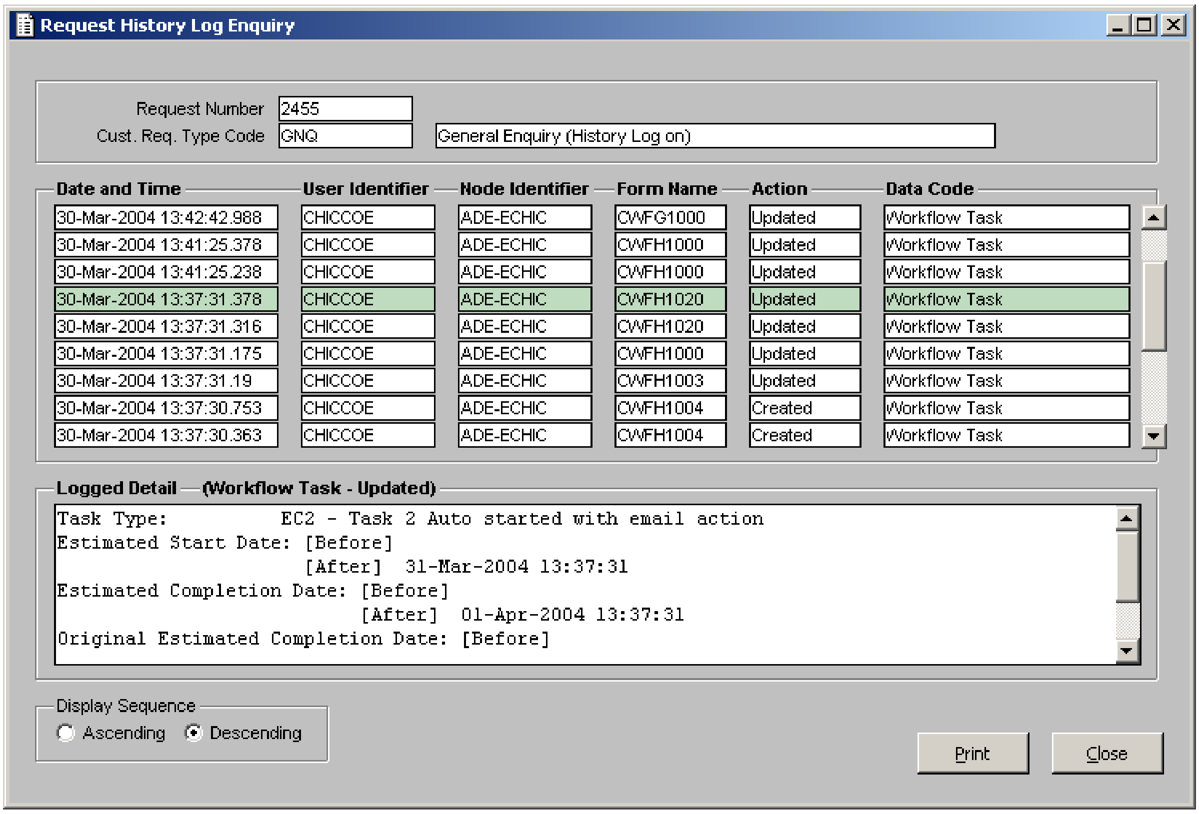

*Request History Log Enquiry showing Associated Request Link*

After viewing Reference Links there will be a ‘Viewed’ log entry recorded. When viewing References the log cannot record details of all possible Reference Links, therefore a simple count of the number of References on the initial link display is logged.



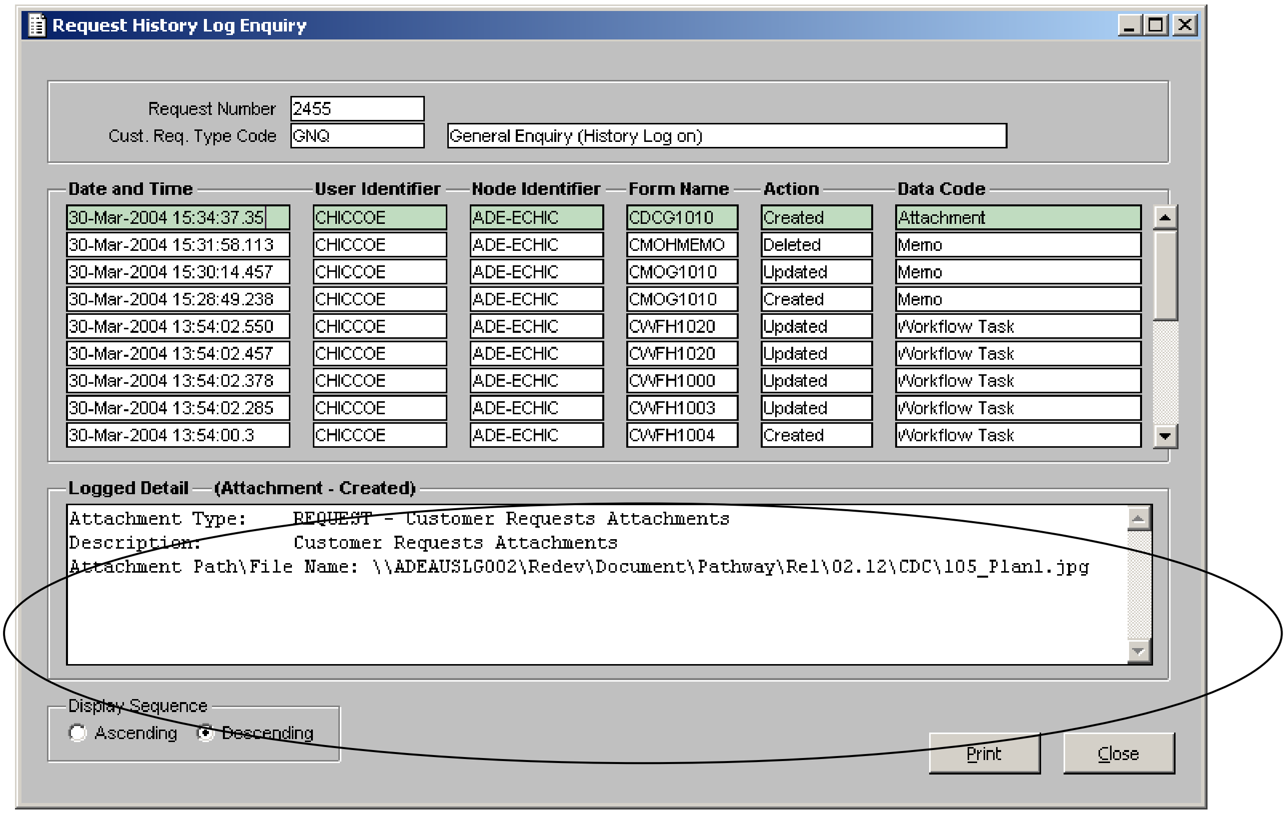

*Request History Log Enquiry showing the Logged Detail for References*

WorkflowTask Data Code logging generates many log entries. There will be a 'Created' and an 'Updated' entry for each Task that is added. The 'Created' entries detail the initial values assigned to each Task record. The 'Updated' entries show the initial values for Estimated Start Dates etc. There are two sets of records because the creation of the Tasks and the calculation of Start and End Dates etc are performed as separate steps. Also, for each Task that is modified there will also be a 'Viewed' log entry.



*Request History Log Enquiry form showing Workflow Task logged details*

The ‘Attach’ Data Code category covers any Create/View or Delete actions performed for File Attachments on a Request. When a new Attachment is added to a Request, a ‘Created’ log entry is written. The log entry will show the details of the attachment including the full Path/Filename.




*Request History Log Enquiry form showing Attachment log details*

**Request Number**
This field displays the selected Request Number.

**Request Type Code**
These fields display the Request Type Code and Description.

**Date and Time**
This field displays the Date and Time of the log entry (i.e. when the Action took place).

**User Identifier**
This field displays the User who performed the Action.

**Node Identifier**
This field displays the terminal/node/PC on which the action took place.

**Form Name**
This field displays the name of the Form which was viewed or modified

**Action**
This field displays the Action which was performed (Viewed or Updated) i.e. the type of log entry.

**Data Code**
This field displays the category of the log entry e.g. Request, Questionnaire Answer, Note etc.

**Logged Detail**
The Logged Detail field displays the recorded detail for the highlighted log entry. The values displayed in the Logged Detail Summary will vary depending on the type of Action and the Data Code. The detail display is made up of the recorded ‘field Label’ and its associated value. In the case of an ‘Update’ action, the values recorded will display with a [Before] and [After] component.

**Display Sequence**

By selecting a radio button, the user is able to select an ascending or descending display sequence for the actions displayed on this form. The default sequence is 'Descending'.

**Print Button**

The Print Button will only display when a History Log Merge Type has been set up in Customer Service System Parameters. This button then allows a document to be generated and printed based on this merge type. Clicking the 'Print' button will cause a full print out, via the Merge Type, of all the History details recorded for the current Request. History details are output in ascending Date and Time sequence.

Beware: This could generate a large number of pages of printed output. An alternative to using this Merge Type print facility is the History Log Report which offers a number of search filter criteria for selecting History Log details for printing.

Note: Each action of generating and printing a document will also be logged. In fact, pressing the 'Print' button will cause 5 log entries to be made.

# Multi Request Maintenance and Bulk Functions

Multi Request Maintenance functionality allows users to maintain details on Requests ‘in bulk’. This will allow users to quickly and easily update Requests with current information without having to maintain each Request individually.

If any of the selected bulk functions do not have parameters set up, then a warning message will display and the process cannot be continued.

If a Request is locked by another User, only the Print Function can be performed. An error will be reported in the Exception Report.

‘Add Note’ Function - If the user is not authorised to ‘Add Note’, the Note will not be added and an error will be reported in the Exception Report.

‘Add Reference’ Function - If the Reference Type is an old one which does not allow multiple links, then the Reference will not be added, and an error will be reported in the Exception Report.

‘Create Letter’ Function - If no Merge Type is selected, or there is no Name link on the Request, or the Name link does not belong to the selected Name Role Type, a letter cannot be created and an error will be reported in the Exception Report.

‘Workflow’ Function - No parameters can be set up for this function. A Task Summary form will display for each selected Request to let users add and perform any Tasks.

**Request Maintenance**

The options that are available in Request Entry are listed below, with a description of how the option functions.

*Add Note*

This function allows the user to enter a note to be added to all the selected Requests. Where different Request Types have been selected, then the user needs to nominate the Note Type to be used. By default, the “Default” note type will be allocated as the Note Type to use.
The user will enter the note details, and then the note will be added to all the Requests without the user having to cycle through each Request.

*Add Reference*

This displays a screen that allows the user to select a Reference Type and add a Reference against all the selected occurrences. The Reference will be added to all the Requests without the user having to cycle through all the Requests.

*Create Letter*

This function allows the user to generate a letter for the Request. The process displays a screen that allows the user to nominate which Name Roles to select for the letter and whether or not they should be concatenated. Where more than one name role is selected, then a letter will be produced for each name role. Where the names are not concatenated a letter will be produced for each individual name, otherwise a letter will be sent to the concatenated Names. The ability to select the Letter to generate will be made available per Request Type. The letter will be generated without presenting each Request.

*Print*

This option functions as per the “Print” button on Request Maintenance. This will allow the user to print a document that will not be retained against the request, e.g. Work Order Sheet. This process will interrogate the Request Type of the Requests selected and allow the user to nominate which document to use to print for each type of Request. The document will then be printed. The document will be printed without having to present each Request.

*Run Workflow*

This function allows the user to maintain the tasks that are against each Customer Service Request that has been selected. It also allows insertion and deletion of tasks. Its principal function is to allow users to execute the tasks that are recorded against each Customer Service Request. The workflow tasks will be presented for each Request that has been selected.

*Update Actioning Officer*

This function allows the user to update the Actioning Officer of the selected Requests to the Officer that is selected. This allows the user to update the Actioning Officer without presenting the user with each Request.

*Update Responsible Officer*

This function allows the user to update the Responsible Officer of the selected Requests to the Officer that is selected. This will allow the user to update the Responsible Officer without displaying each Request.

*Update Status*

This function will allow the user to update the Status of the selected Requests.
If a "Completion" Status is selected, then the current business rules will take effect, and only requests that can be completed will be updated with the completion status selected. Any requests that are not able to be completed will be presented to the user in a message at the end of the process. The user will then be responsible for taking any further action. The Status of each Request will be updated without presenting the user with each Request.

*Update Contact Type*

This function will allow the user to update the Contact Type of the selected Requests. This will allow the user to update the Contact Type of the Request in a single step.

For parameter details see Multi Request Maintenance Parameters.

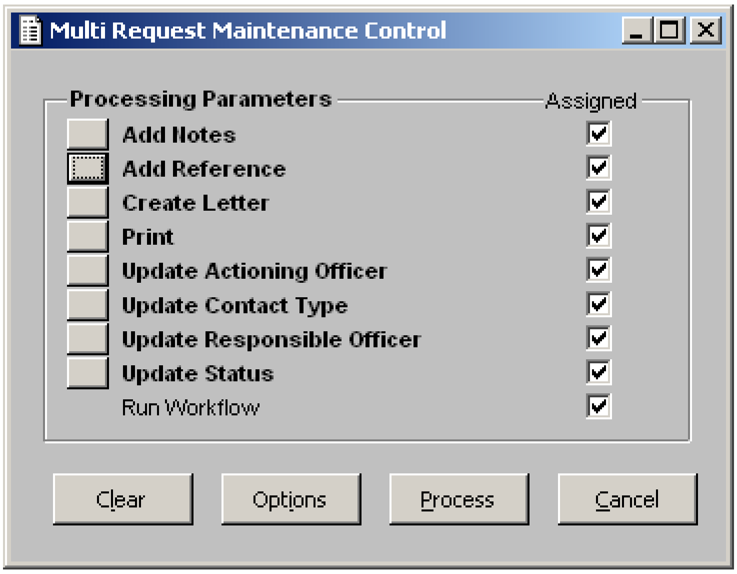
## Multi Request Maintenance Control form

This form is accessed via the 'Options' button on each of the Request Selection forms. The user would multi-select Requests on the Selection form, then select the 'Options' button to perform maintenance on all the selected Requests.

Initially, the user would assign the required Bulk Functions, then set up the required details for each active Bulk Function. The flags on the right-hand side of the form indicate which Functions need setting up. All active ones are mandatory.

The Process button performs the bulk update process. Cancelling on the form will delete any details that have been set up.

User and system defaults may be set up if desired.




*Multi Request Maintenance Control form*

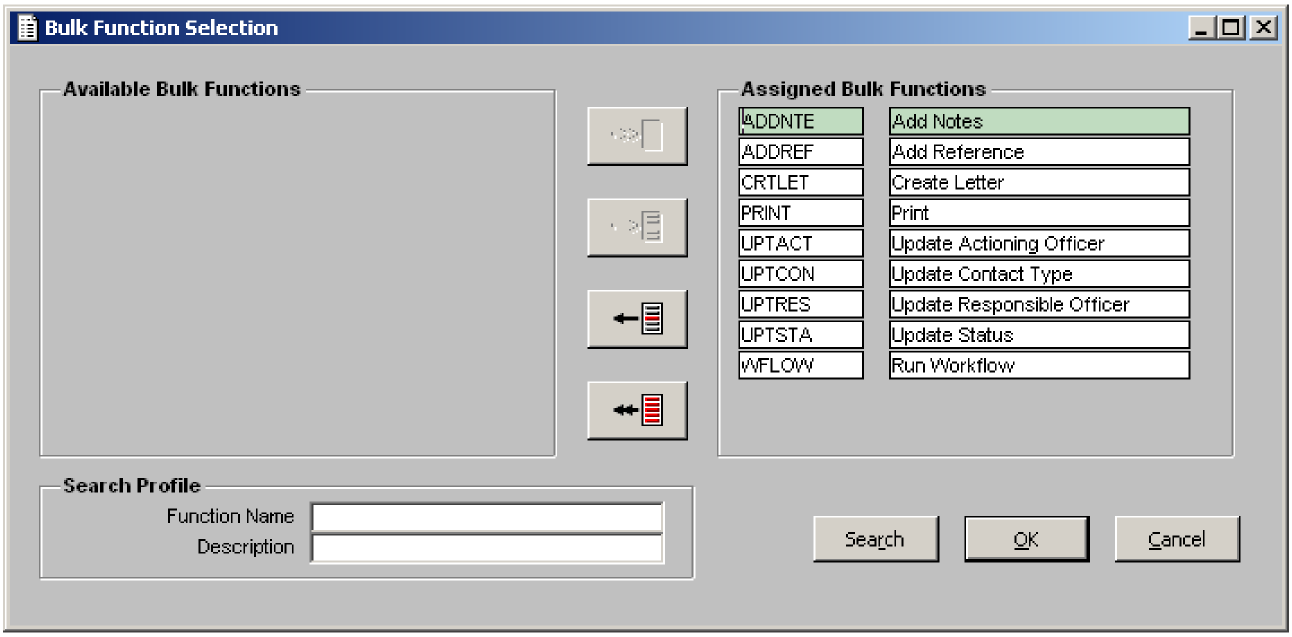
# Bulk Functions

When Bulk Functions have been assigned at the Parameter level (Customer Service>>Parameters>>System Parameters) via the Multi Request Maintenance Parameters Option button, they display on this form. When parameters are set up behind each button, the label becomes bolded and the ‘Assigned’ indicator becomes checked on. The Active flag may be checked OFF, if required, without deleting the parameters which have been set up. As a result, processing will not occur for that particular function.

The Clear button can be used to clear all parameters on this form. User defaults may also be set up to retrieve parameters which are used frequently.

## Bulk Function Selection form

The Bulk Function Selection form allows the user to assign available Bulk Functions for use in this session. Only those Functions which have been selected via Multi Request Maintenance Parameters will be available for selection.




*Bulk Function Selection form*

### Available Bulk Functions

All Bulk Functions which have been assigned via the Parameters will be available for selection on the right-hand side of this form. Selecting the ‘Select’ or ‘Remove’ buttons will move selected Functions from one side of the form to the other.

### Assigned Bulk Functions

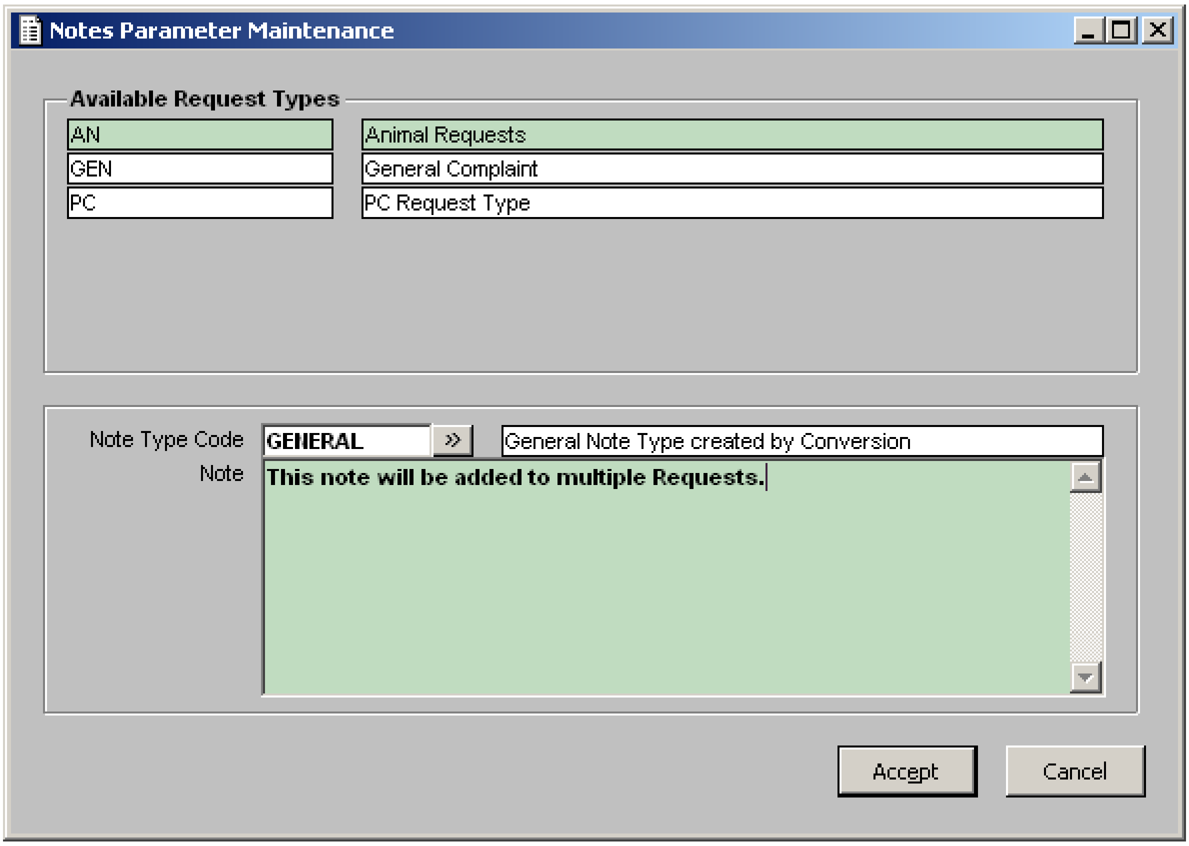
The user is able to select all or individual Bulk Functions to use in maintaining the selected Requests. Selecting the ‘Select’ or ‘Remove’ buttons will move selected Functions from one side of the form to the other

### Search Profile – Function Name/Description

Searching may be performed over the ‘Available’ side of the form by entering a Function Name and/or Description as the search criteria and selecting the Search button.

## Notes Parameter Maintenance form

The Notes Parameter Maintenance form displays when the 'Add Notes' option is selected from the Multi Request Maintenance Control form. It allows the user to add a Note of a selected Note Type to all selected Requests.



*Notes Parameter Maintenance form*

**Available Request Types**

These fields list the Request Types pertaining to the Requests which have been selected on the Request Selection form.

**Note Type Code**

Initially, the default Note Type for each Request Type will default into this field if a default has been set up. The user is able to change or select another Note Type from the Pop Up. If there is no default Note Type for the Request Type, this field will initially be blank. It is a mandatory field.

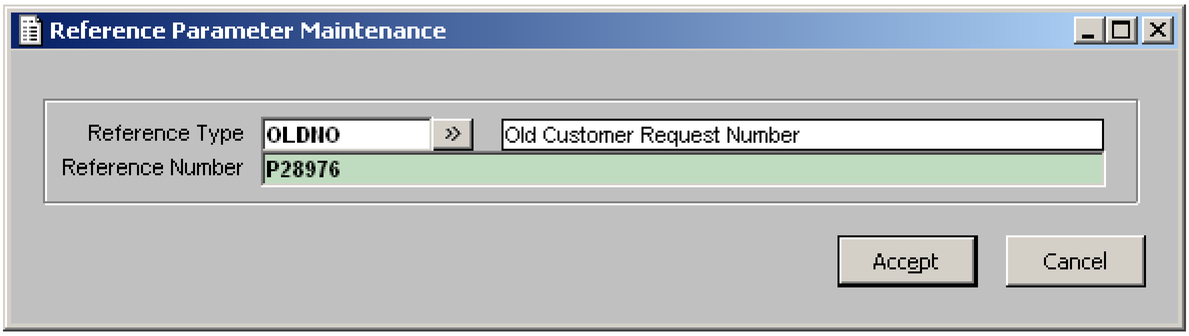
Note: If there are a number of Request Types listed in the Available Note Types section, a Note is required to be added for each Request Type.

**Note**

The Note field is a free text field which allows s a Note to be added to all selected Requests. It allows an unlimited amount of text to be entered. A Spelling Checker is available via the Tools menu option. This is a mandatory field.

## Reference Parameter Maintenance Form

This form displays when the 'Add Reference' option button is selected on the Multi Request Maintenance Control form. It allows the user to add a Reference to all selected Requests.



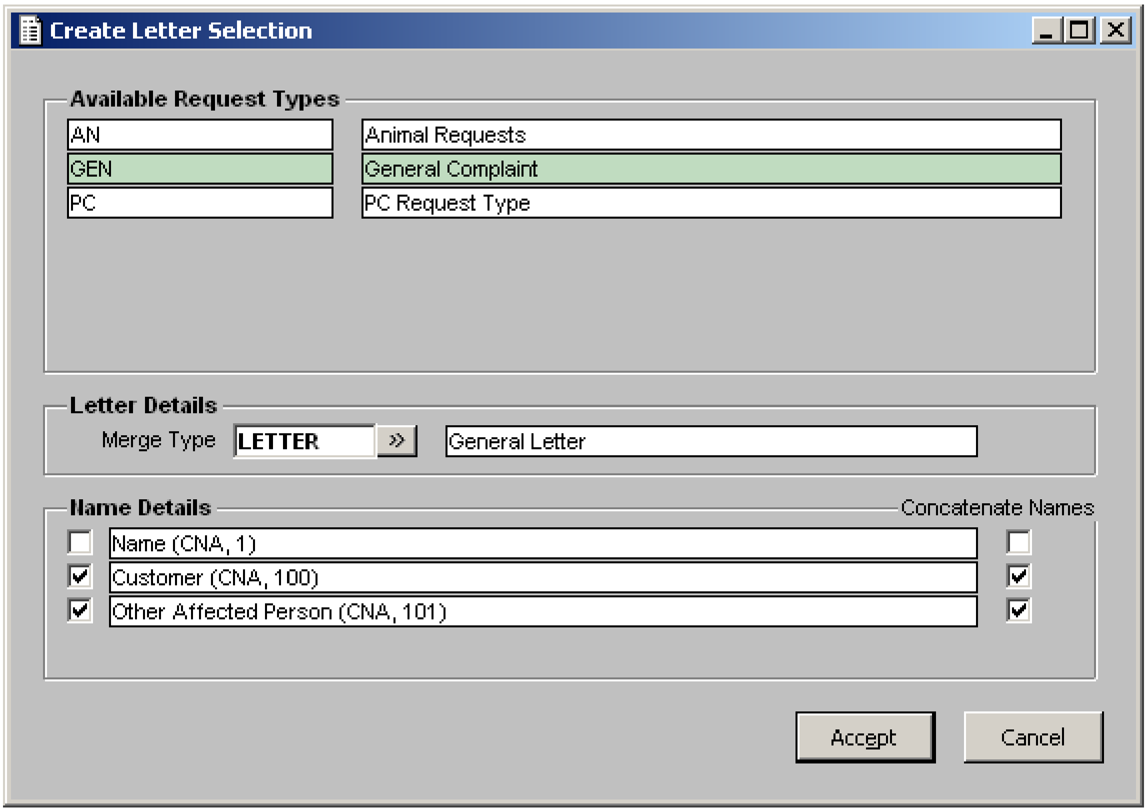

*Reference Parameter Maintenance Form*

**Reference Type/Number**

All Reference Types defined for Customer Service will be available for selection via the Pop Up. Alternatively a Reference Type may be keyed in. Once the Reference Type has been entered, a Reference Number (or details) must be keyed in. The Reference Number field is a mandatory field of up to 50 characters.

## Create Letter Selection Form

This form displays when the 'Create Letter' option button is selected on the Multi Request Maintenance Control form. It allows the user to create a document to attach to all selected Requests.




*Create Letter Selection Form*

**Available Request Types**

These fields list the Request Types pertaining to the Requests which have been selected on the Request Selection form.

**Letter Details**

For each Request Type listed in the 'Available Request Types' section, the default Merge Type will be defaulted into the Merge Type field. If no default Merge Type has been set up for a Request Type, then this field will initially be blank. The user may modify the details in this field either by keying in or selecting from the Pop Up. This field is mandatory.

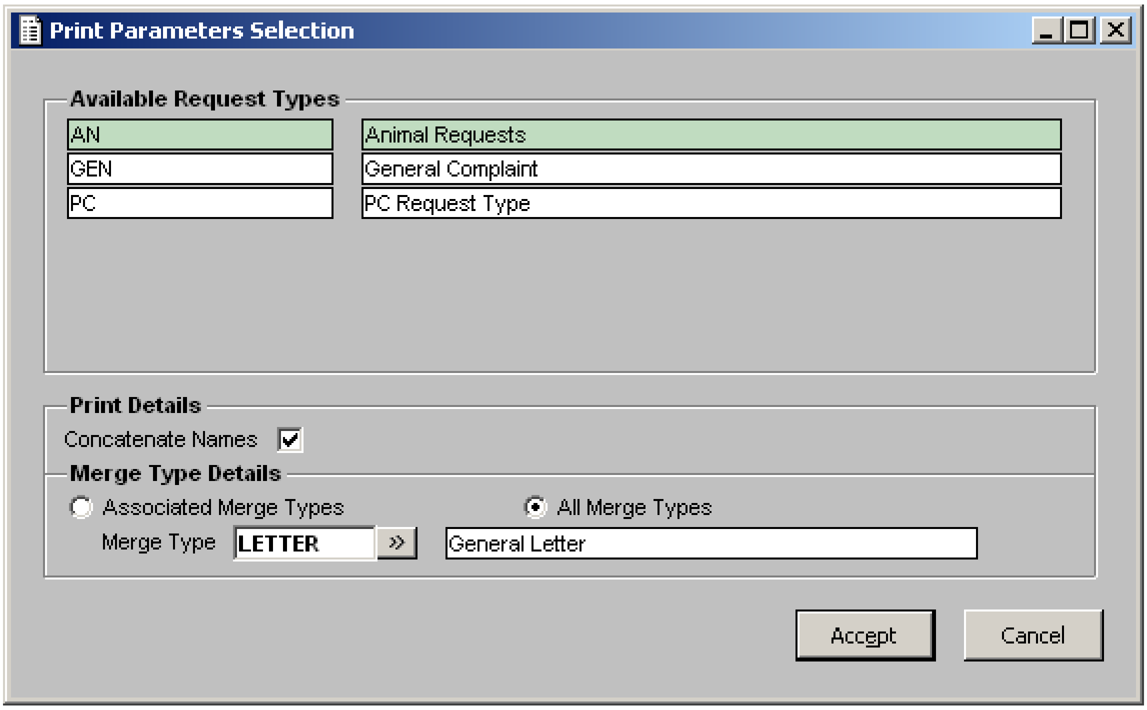
**Name Details**

All Name Role Types assigned to the Request Type which has focus will be listed here. If a Name Role Type is selected (by checking ON the flag preceding it) the letter will be addressed to the person associated with the Name Role Type link.

A Concatenate flag is also available to concatenate all Names together within a Role Type. If this flag is checked ON, and there is more than one Name associated with a Role Type, the document will list all Names as the Document Addressee, e.g. A J Brown and P S Smith.

## Print Parameters Selection Form

This form displays when the 'Print' option button is selected on the Multi Request Maintenance Control form. It allows parameters to be set up for printing the documents created by the 'Create Letter' option.




*Print Parameters Selection Form*

**Available Request Types**

These fields list the Request Types pertaining to the Requests which have been selected on the Request Selection form.

**Print Details**

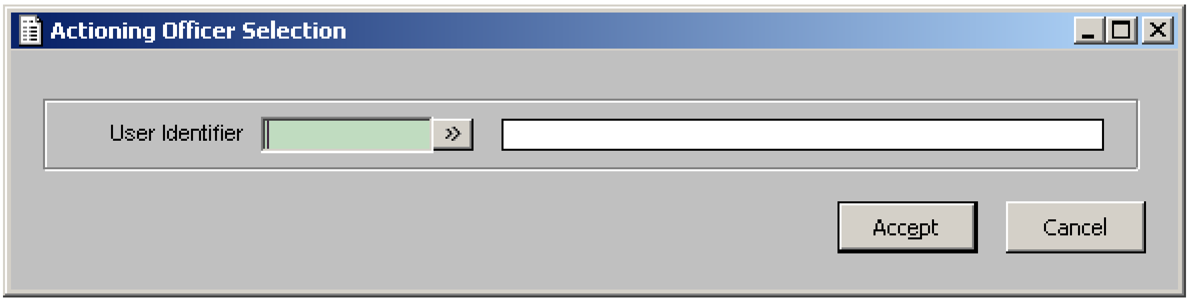
Normally, this function enables a document to be printed listing details of the Request and including the first Name, which is attached to the Request, in the relevant Name fields. If more than one Name is attached to a Request and the Concatenate flag has been checked ON, then the printed document will list all Names concatenated together, e.g. A J Brown and P J Smith.

**Merge Type Details**

For each Request Type listed in the ‘Available Request Types’ list, the default Merge Type for the Request Type will default into these fields. If the user is not authorised to use the Merge Type, then the default Merge Type from System Parameters will be used instead.

## Actioning Officer/Responsible Officer Selection Form

This form displays when the ‘Update Actioning Officer’ option button is selected on the Multi Request Maintenance Control form. It allows the Actioning Officer/Responsible Officer to be updated in all selected Requests.



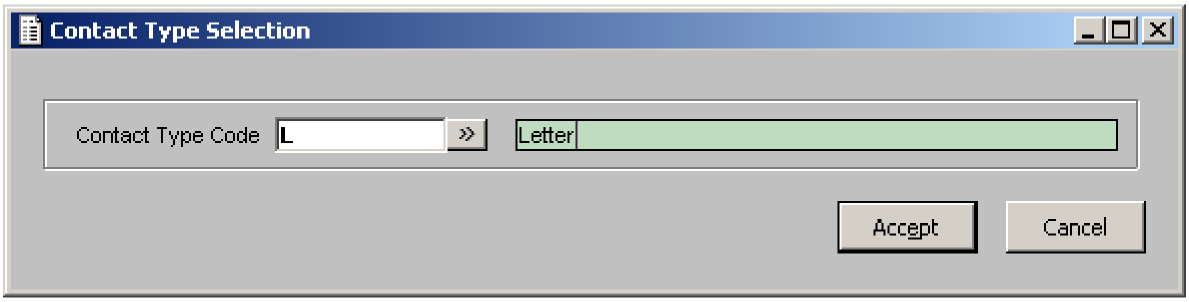

Update Actioning Officer form

### User Identifier

These fields allow entry or selection of a valid Pathway User.

## Contact Type Selection Form

This form displays when the ‘Update Contact Type’ option button is selected on the Multi Request Maintenance Control form. It allows the Contact Type to be updated in all selected Requests.




*Contact Type Selection Form*

### Contact Type Code

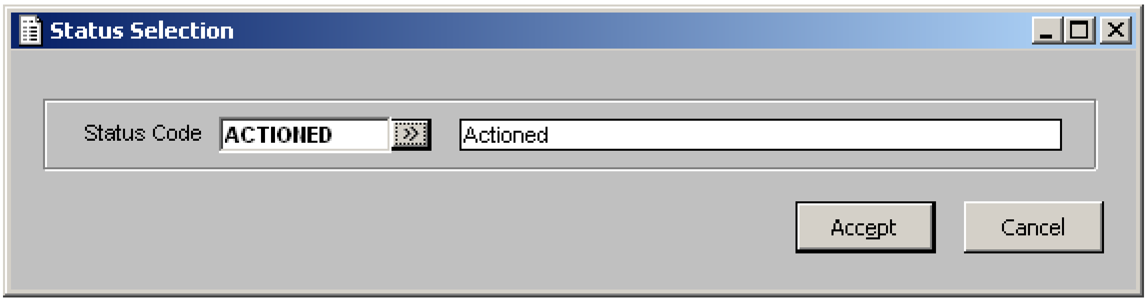
A Contact Type may be keyed in or selected from the Pop Up for updating all selected Requests.

Note: If a user-defined label has been used for the Contact Type label, then it will display on this form.

## Status Selection Form

This form displays when the 'Update Contact Type' option button is selected on the Multi Request Maintenance Control form. It allows the Contact Type to be updated in all selected Requests.

Where the site does not have authority to the 'Status Codes at Request Type Level' functionality the normal 'Status Selection' form will be displayed and the user is required to select a single Status Code that will be applied to all selected Requests.




*Status Selection Form*

**Status Code**
These fields allow a Status Code to be keyed in or selected from the Pop Up for updating all selected Requests.

NOTE All Status Codes will be valid / displayed in the Pop Up form

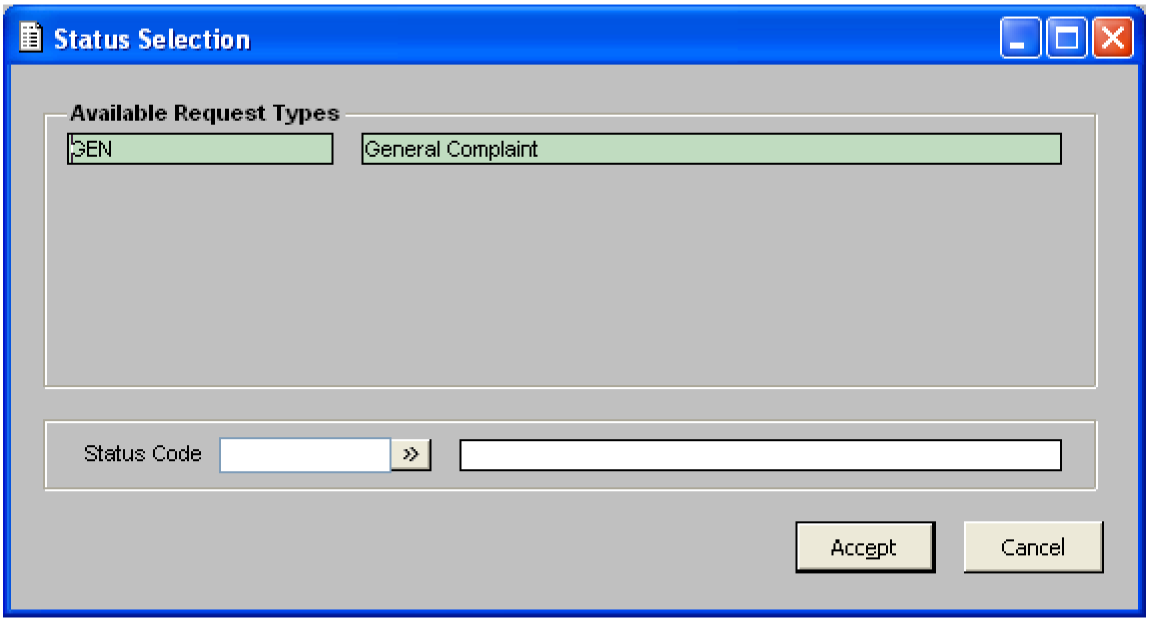
When the Process button is selected on the Multi Request Maintenance Control form, the Status for each of the selected Requests will be set to the single Status Code nominated on the 'Status Selection' form.

## Status Selection Form (Authorised Function)

When the Authorised Function 'Status Codes at Request Type Level' is active a new 'Status Selection' form will display when the Update Status button is selected on the Multi-Request Maintenance Control form.

This form will require the user to define a new Status Code for each Request Type found for the selected Requests.

When the Process button is selected on the Multi Request Maintenance Control form, the Status of each of the selected Requests will be set to the Status Code nominated for the Request Type of the Request on the 'Status Selection' form.




*Status Selection form (only used with 'Status Codes at Request Type Level' authorised Function*

**Available Request Types**
All selected Request Types will display in this section.

The user must highlight each Request Type and then enter or select a Status Code.

**Status Code**
If one or more Status Codes has been assigned to the Request Type, then only those Status Codes that have been assigned to the Request Type will be valid  and will display in the Pop Up form.

(If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status Codes will be valid / displayed in the Pop Up form)

# Reporting & Batch Functions

The following topics are covered in this chapter:

Overdue Warning Report
Customer Request Report
Application Tasks Report
Asset Exception Report
History Log Report
On Hold Report
Multiple Completion of Requests
Purging Requests
Automatic Priority Escalation
Responsible Officer Assignment
Reino Parking Meter Maintenance Output Interface
Reino Parking Meter Maintenance Input Interface

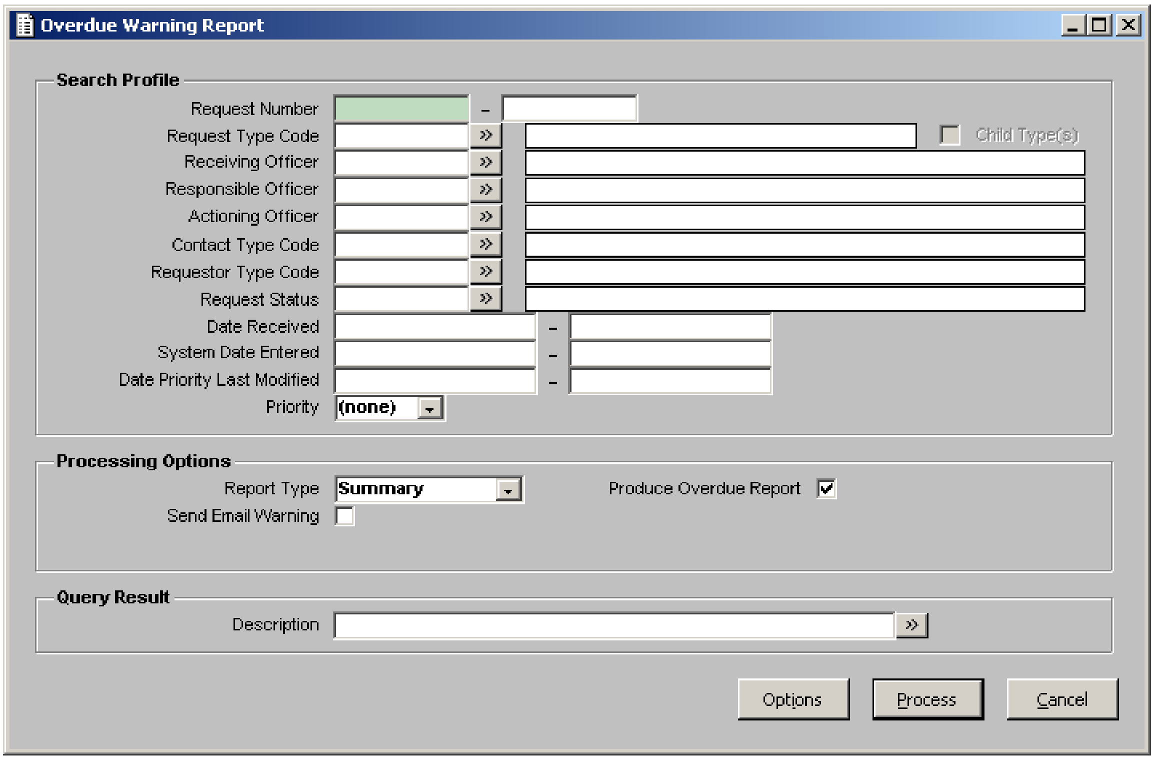
# Overdue Warning Report

The Overdue Warning Report allows the user to produce a Report (or send an e-mail warning) for any Customer Service Requests that have not been actioned (Request Status is Unactioned) and have a Date to Respond By less than today's date. The Report can also be used to send Overdue Warning Emails to the Responsible Officers of Requests that are Unactioned and are overdue or about to become overdue.

## Overdue Warning Report Form

The Overdue Warning Report Form allows the user to produce a Report for any Customer Service Requests that have not been actioned. (Request Status is Unactioned)

The report can be produced in detailed or summary form.




*Overdue Warning Report Form*

### Request Number

Enter a "from" and "to" request number range to restrict the report to a specific range of requests.

### Request Type Code

Enter a valid Request Type into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the request type will be displayed.

### Child Type(s)

This flag will become available once the Request Type is entered on the Search Profile form. It allows Child Request Types to be included in the search.

### Contact Type Code

Enter a valid Contact Type into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the Contact Type will be displayed.

Entering a Contact Type into this field will restrict the report to only requests that have a matching Contact Type. For example selecting a Contact Type of Phone will only list requests taken over the Phone.

**Receiving Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the report to only requests that have a matching User ID in the Receiving Officer field on the Request.

**Responsible Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the report to only requests that have a matching user id in the Responsible Officer field on the request.

**Actioning Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the report to only requests that have a matching user id in the Actioning Officer field on the request.

**Requestor Type Code**

Enter a valid Requestor type into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the Requestor type will be displayed.

Entering a Requestor type into this field will restrict the report to only requests that have a matching Requestor type. For example selecting a Requestor type of Councillor will only list requests submitted by Councillors.

**Request Status**

Enter a valid Request Status into this field or alternatively press the pop up button associated with the field to select from a list. The full description of the Request Status will be displayed.

Entering a Request Status into this field will restrict the report to only requests that have a matching Request Status. Only 'Incomplete' Statuses will be available for selection from the Pop Up.

**Functionality applicable to the authorised Function: 'Status Codes at Request Type Level'.**

New functionality has been added for the 'Request Status' field when a 'Request Type Code' is nominated.

If the Authorised Function is authorised

- If one or more Status Codes has been assigned to the selected Request Type, then only those Status Codes with 'Completed' set to 'No' that have been assigned to the Request Type will be valid and will display in the Pop Up form.
- (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes with 'Completed' set to 'No' will be valid/displayed in the Pop Up form)

Where the site does not have authority to the new functionality

- Existing functionality will apply – i.e. all Status Codes with 'Completed' set to 'No' will be valid/displayed in the Pop Up form)

**Date Received**

Enter a valid date range into the field(s) to restrict the report to requests matching that range.

> As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April.

**System Date Entered**

The user may select a date range to search for Requests within the System Date Entered range. Enter a "from" and "to" range. This field is the date that the Request was entered into the system.

> As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April.

**Date Priority Last Modified**

Enter a valid date range into the field(s) to restrict the report to requests matching that range.

> As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April.

**Priority**

Entering a priority number will restrict the report to requests that have a matching priority. If the Priority is not to be considered then (none) should be selected.

**Report Type**

The Report type offers the user two selections via drop down button. The User may select from a summary report or a detailed report. When in Summary Mode the report contains the following fields:

- Request Number
- Request Type
- Responsible Officer
- Date to Respond By

When in Detail mode the report contains the following fields:

- Request Number
- Request Type
- Responsible Officer
- Receiving Officer
- Requestor Type
- Contact Type
- Date Received
- Date to Respond By
- Priority
- Questionnaire Details
- Module Link Details

In Detail mode a new page is started for each Request.

**Produce Overdue Report**
If this flag is checked on a report will be generated.

If this flag is checked off, and the Send Email Warning is checked on, then an Email Warning only will be issued to the relevant Actioning Officers.

**Send Email Warning**
If the Send Email Warning Flag is checked on an e-mail will be sent to all Actioning Officers that a Request is overdue.

If this flag is not checked on then only the Report will be produced.

When the Send Email Warning is checked on the “Days Remaining Till Overdue” field will be displayed on the form.

**Using Search Profile as Filter**
This flag provides the ability to indicate whether the search profile that is used to produce the report should also be used in sending the reminder email message. If ‘Using Search Profile as Filter’ is set on, then the search criteria entered by the user is used in determining if an email reminder message is sent. If this option is off, then a reminder email message will be sent to any request that will become overdue in the specified number of days.

**Days Remaining till Overdue**
Enter the number of days remaining before the Request will be overdue. This flag is used in conjunction with the ‘Send Email Warning’ flag to send a reminder message to all Requests which will soon become overdue. If the ‘Using Search Profile as Filter’ flag is on, then the search criteria entered by the user will be used to determine if an email message is sent. If this option is off, then a reminder message will be sent to any request that will become overdue in the specified number of days.

**Notify Responsible Officer**
If the "Send Email Warning" flag is checked on, then the "Notify Responsible Officer" flag becomes available. This will send a 'Reminder' email to the Responsible Officer in addition to the Actioning Officer of a Request. Where the Actioning and Responsible Officer are the same then only one email will be sent.

**Query Result - Description**
The user may select from a predefined query result on which to base the Overdue Warning Report. The Query Result may be used in place of the Search Profile options, not in conjunction with them. When a query is selected, the user is able to nominate whether a reminder message should be sent. The option to specify a search profile is not available when a query is specified.

The Description field allows the user to enter the name of the Query if known, or use the Pop Up Button to select from a list of pre-defined Queries based on the Customer Service Module.

Once the Options are selected, the user may select the specific Processing Options required to produce the Report. Full details on Batch Processing may be found in the Batch Processing Manual.

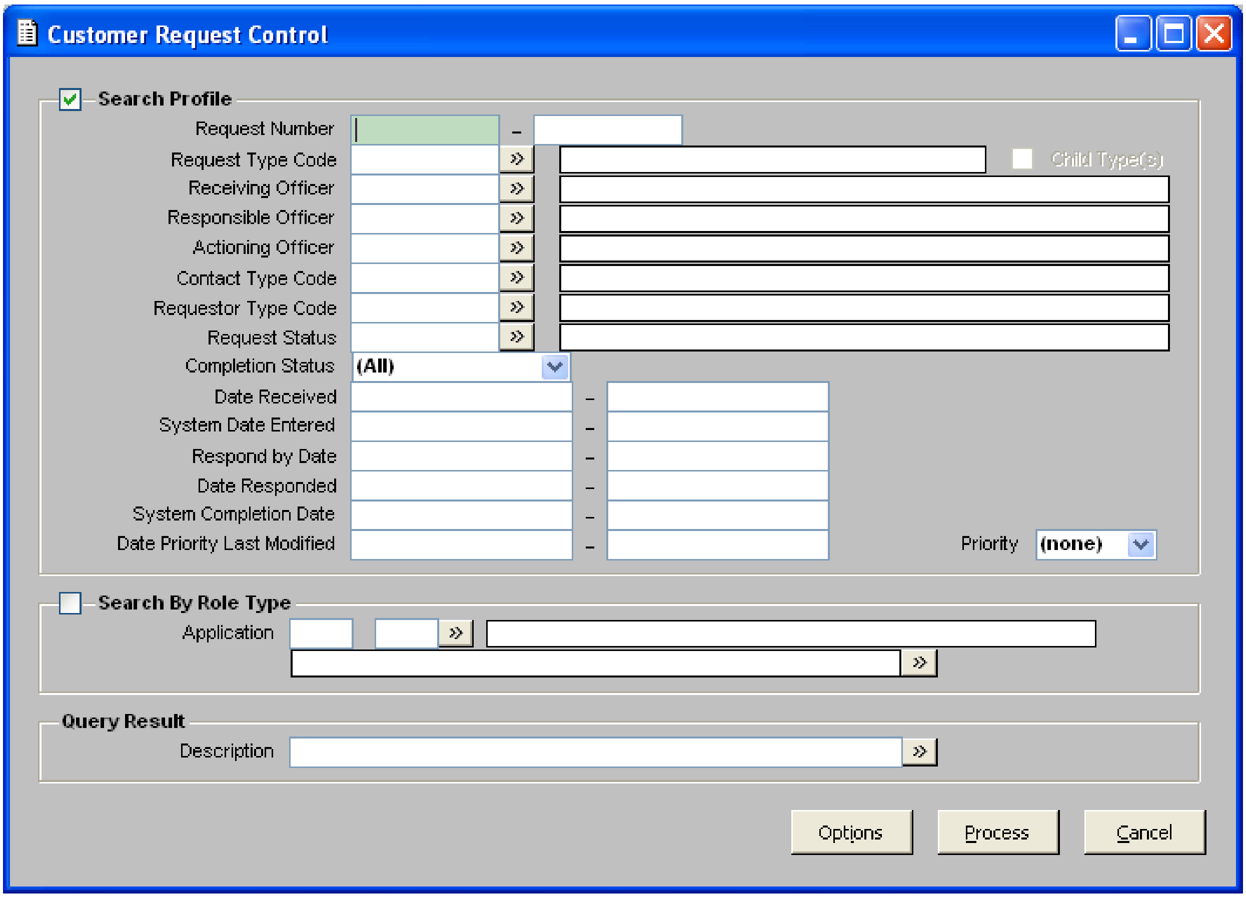
# Customer Request Report

The Customer Request Report is a generic report that may be used to select various requests based on specific search criteria.

## Customer Request Report Control Form

This report is a generic report that may be used to select various requests based on specific search criteria.

Output from this report is stored in the reporting entities ARPCR01 (Request details), ARPCR02 (Request Notes), ARPCR03 (Request Answers) and ARPCR04 (Request Module Links). Generic export may be used to generate flat files from these entities.




*Customer Request Report Form*

### Search Profile Flag

Check this flag on when the data is to be filtered by any of the fields specified in the first section of the form. This flag will be checked on by default upon entering this form.

### Request Number

Enter a “from” and “to” request number range to restrict the report to a specific range of requests.

### Request Type Code

Enter a valid Request Type into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the request type will be displayed.

Entering a request type into this field will restrict the report to only requests that have a matching request type. For example selecting a request type of Barking Dog will only list requests of that nature.

**Contact Type Code**

Enter a valid Contact type into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the contact type will be displayed.

Entering a Contact Type into this field will restrict the report to only requests that have a matching Contact Type. For example selecting a Contact Type of Phone will only list requests taken over the Phone.

**Responsible Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the report to only requests that have a matching user id in the Responsible Officer field on the request.

**Actioning Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the report to only requests that have a matching user id in the Actioning Officer field on the request.

**Receiving Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the report to only requests that have a matching user id in the Receiving Officer field on the request.

**Requestor Type Code**

Enter a valid Requestor type into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the Requestor type will be displayed.

Entering a Requestor type into this field will restrict the report to only requests that have a matching Requestor type. For example selecting a Requestor type of Councillor will only list requests submitted by Councillors.

**Request Status**

Enter a valid Request Status into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the Request Status will be displayed.

Entering a Request Status into this field will restrict the report to only requests that have a matching Request Status. All Statuses will be available for selection from the Pop Up.

**Functionality applicable to the authorised Function: 'Status Codes at Request Type Level'.**

New functionality has been added for the 'Request Status' field when a 'Request Type Code' is nominated.

If the Authorised Function is authorised

- If one or more Status Codes has been assigned to the selected Request Type, then only those Status Codes that have been assigned to the Request Type will be valid and will display in the Pop Up form.
- (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes will be valid/displayed in the Pop Up form)

Where the site does not have authority to the new functionality

- Existing functionality will apply – i.e. all Status Codes will be valid/displayed in the Pop Up form)

**Completion Status**
The Customer Request Control form allows filtering by Completion Status, allowing the user to optionally limit Requests reported on to those either Completed or still Incomplete.

When a Completion Status of 'Complete' or 'Incomplete' is selected, the Request Status field will be dimmed and unavailable. Conversely, when a single Request Status (e.g. UNACTIONED) is selected for the search profile, the Completion Status field will be dimmed and unavailable.

**Date Received**
Enter a valid date range into the field(s) to restrict the report to requests matching that range.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April. Dates selected from the Calendar will assume the current Time.

**System Date Entered**
The user may select a date range to search for Requests within the System Date Entered range. Enter a "from" and "to" range. This field is the date that the Request was entered into the system.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April. Dates selected from the Calendar will assume the current Time.

**Date to Respond by**
Enter a valid date range into the field(s) to restrict the report to requests matching that range.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April. Dates selected from the Calendar will assume the current Time.

**Date Responded**
Enter a valid date range into the field(s) to restrict the report to requests matching that range.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April. Dates selected from the Calendar will assume the current Time.

**System Completion Date**

The user may select a date range to search for Requests within the System Completion Date range. Enter a "from" and "to" range. This field is the date that the Request was completed in the system.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April. Dates selected from the Calendar will assume the current Time.

**Date Priority Last Modified**

Enter a valid date range into the field(s) to restrict the report to requests matching that range.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the "from" and "to" fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the 1st April to the 5th April (inclusive) then the from and to date range will need to be 1st April to the 6th April. Dates selected from the Calendar will assume the current Time.

**Request Status**

Select a Request Status from the drop down list to restrict the report to requests matching that status. If the Request Status is not to be considered then (none) should be selected.

**Valid Request Statuses are:**

- Unactioned
- Actioned
- No Action Required
- Request Complete
- Requires/Required Action

The Request Complete status will report over all requests with either an Actioned or No Action Required status.

The Requires/Required Action status will report over all requests with either an Actioned or Unactioned status.

**Priority**

Entering a priority number will restrict the report to requests that have a matching priority. If the Priority is not to be considered then (none) should be selected.

**Search by Role Type Flag**

Check this flag on when the data is to be filtered by any of the fields specified in the second section of the form (Search by Role Type). This flag will be checked on when any Role Type field is entered.

**Search by Role Type**

Entering a Role Type will restrict the report to requests that only have a link to the nominated module.

**Example**

If the Role Type LPA 1 is entered then only requests that have a property link will be reported.

**Application Description**

This field gives the ability to restrict the report to requests that only have a link to the nominated record.

**Example**
If the Role Type LPA 1 has been nominated then a property address may be selected (via the Pop Up button). Only requests that are linked to that property address will be reported.

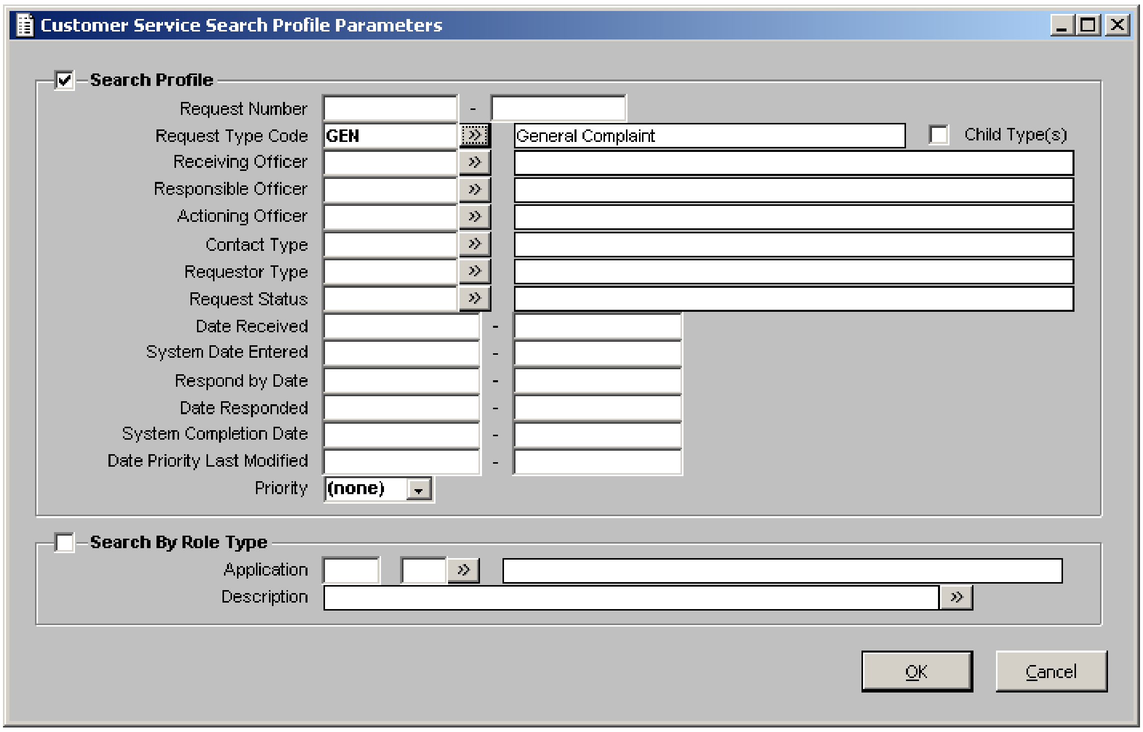
**Query Result**

The report may be restricted to only those requests that have been selected via a Query. When a Query Result set is used then all other Search Profile information on the form is ignored.

# Application Tasks Report

## Customer Service Search Profile Parameters Form

This search profile allows further filtering prior to running the Application Tasks Report.




*Customer Service Search Profile Parameters Form*

### Request Number

A Request Number range may be entered into this field to select one Request or a range of Requests to include in the report.

### Request Type Code

A Request Type, if known, may be keyed into this field. The Pop Up Button may be selected to display the pre-defined list of Request Types. Once the Code is selected, the full description of the Request Type will be displayed.

### Child Type(s)

This flag will become available once the Request Type is entered on the form. It allows Child Request Types to be included in the search profile.

### Contact Type

A Contact Type, if known, may be keyed into this field. The Pop Up Button may be selected to display the pre-defined list of Contact Types. Once the Code is selected, the full description of the Contact Type will be displayed.

### Responsible Officer

A Responsible Officer Code, if known, may be keyed into this field. The Pop Up Button may be selected to display the pre-defined list of Responsible Officer Codes. Once the Code is selected, the full name of the Responsible Officer will be displayed

**Actioning Officer**

An Actioning Officer Code, if known, may be keyed into this field. The Pop Up Button may be selected to display the pre-defined list of Actioning Officer Codes. Once the Code is selected, the full name of the Actioning Officer will be displayed.

**Receiving Officer**

A Receiving Officer Code, if known, may be keyed into this field. The Pop Up Button may be selected to display the pre-defined list of Receiving Officers. Once the Code is selected, the full name of the Receiving Officer will be displayed.

**Requestor Type**

A Requestor Type, if known, may be keyed into this field. The Pop Up Button may be selected to display the pre-defined list of Requestor Types. Once the Code is selected, the full description of the Requestor will be displayed.

**Request Status**

Select a Request Status from the Pop Up to select Requests matching that status. If the Request Status is not to be considered then this field should be left blank(none) should be selected. Request Statuses are user defined and can be set up within parameters.

**Date Received**

The user may select a date range to select Requests within the Date Received Range. Enter a “from” and “to” date range.

**System Date Entered**

The user may select a date range to search for Requests within the System Date Entered range. Enter a “from” and “to” range. This field is the date that the Request was entered into the system.

**Respond by Date**

The user may select a date range to select Requests within the Respond By Date range. Enter a “from” and “to” range. This field is the date that the Request is due to be actioned by.

**Date Responded**

The user may select a date range to select Requests within the Date Responded Range. Enter a “from” and “to” range. This field is the date that the Request was actioned.

**System Completion Date**

The user may select a date range to search for Requests within the System Completion Date range. Enter a “from” and “to” range. This field is the date that the Request was completed in the system.

**Date Priority Last Modified**

The user may select a date range to select Requests within the Date Priority Last Modified Range. Enter a “from” and “to” range. This field is the date that the Request was actioned.

**Priority**

Selecting from-1 –5 will limit the search to those requests with a matching Priority.

**Search by Role Type - Application / Description**

If this flag is checked on then the report will be produced based on a specific module link. E.g. by property address.

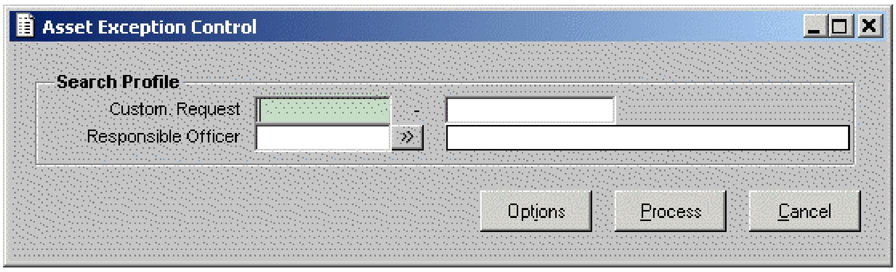
Enter a valid role code or select from the available pop up.

**Example**

To select all requests that have been lodged against a specific property address then select the role link type of LPA 1. The Pop Up button on the next field may then be pressed. The Property Search Profile form will be displayed from which you can enter the required property address.

# Asset Exception Report

## Asset Exception Control Form



*Asset Exception Control Form*

**Search Profile – Request**

Enter a Request Number or range of Request Numbers over which to conduct your report.

**Search Profile – Responsible Officer**

Enter a Responsible Officer over which to run your report. Alternatively, you may select one from the Pop Up.

# History Log Report

## History Log Report Control Form

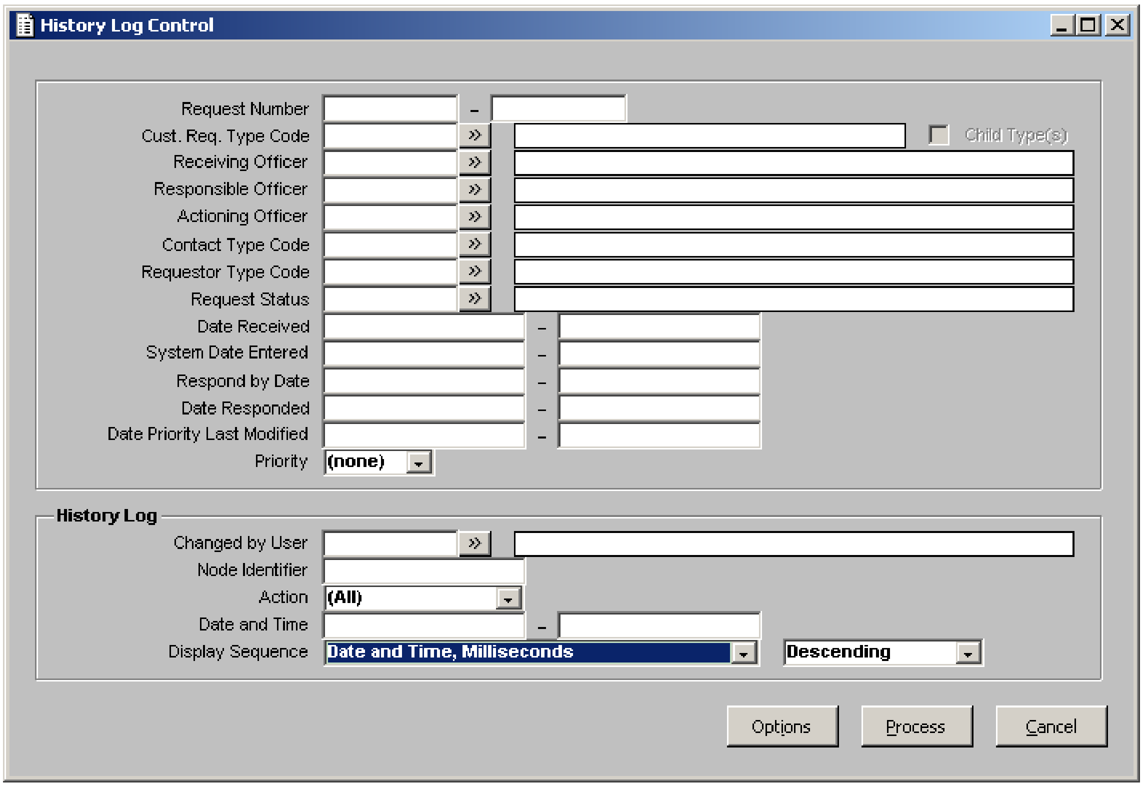
The History Log Report Control form offers similar search filter capabilities to the customer Service Request Report, and additionally provides for the filtering of the History Log details from the selected Requests.

Additional History Log filter fields are;

- The User Id of the user who caused the log entry to be made
- The Node Id of the PC on which the log entry was made
- The type of log entry
- A range of Date and Time values.

It is also possible to sequence the log entries within each Request by Ascending/Descending Date and Time, or by Date and Time within User-Id.

See also History Log Action Parameters and Request History.




*History Log Control form*

**Request Number**

Enter a “from” and “to” request number range to restrict the report to a specific range of requests.

**Request Type Code**

Enter a valid Request Type into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the request type will be displayed.

Entering a request type into this field will restrict the report to only requests that have a matching request type. For example selecting a request type of Barking Dog will only list requests of that nature.

Checking the ‘Child Types’ flag ON will include any child Request Types in the search.

**Receiving Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the report to only requests that have a matching user id in the Receiving Officer field on the request.

**Responsible Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the report to only requests that have a matching user id in the Responsible Officer field on the request.

**Actioning Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the report to only requests that have a matching user id in the Actioning Officer field on the request.

**Contact Type Code**

Enter a valid Contact Type into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the contact type will be displayed.

Entering a Contact Type into this field will restrict the report to only requests that have a matching Contact Type. For example selecting a Contact Type of Phone will only list requests taken over the Phone.

**Requestor Type Code**

Enter a valid Requestor type into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the Requestor type will be displayed.

Entering a Requestor type into this field will restrict the report to only requests that have a matching Requestor type. For example selecting a Requestor type of Councillor will only list requests submitted by Councillors.

**Request Status**

Enter a valid Request Status into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the Request Status will be displayed.

Entering a Request Status into this field will restrict the report to only requests that have a matching Request Status. All Statuses will be available for selection from the Pop Up.

**Date Received**

Enter a valid date range into the field(s) to restrict the report to requests matching that range.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the “from” and “to” fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the $1^{st}$ April to the $5^{th}$ April (inclusive) then the from and to date range will need to be $1^{st}$ April to the $6^{th}$ April. Dates selected from the Calendar will assume the current Time.

**System Date Entered**

The user may select a date range to search for Requests within the System Date Entered range. Enter a “from” and “to” range. This field is the date that the Request was entered into the system.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the “from” and “to” fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the $1^{st}$ April to the $5^{th}$ April (inclusive) then the from and to date range will need to be $1^{st}$ April to the $6^{th}$ April. Dates selected from the Calendar will assume the current Time.

**Respond By Date**

Enter a valid date range into the field(s) to restrict the report to requests matching that range.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the “from” and “to” fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the $1^{st}$ April to the $5^{th}$ April (inclusive) then the from and to date range will need to be $1^{st}$ April to the $6^{th}$ April. Dates selected from the Calendar will assume the current Time.

**Date Responded**

Enter a valid date range into the field(s) to restrict the report to requests matching that range.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the “from” and “to” fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the $1^{st}$ April to the $5^{th}$ April (inclusive) then the from and to date range will need to be $1^{st}$ April to the $6^{th}$ April. Dates selected from the Calendar will assume the current Time.

**Date Priority Last Modified**

Enter a valid date range into the field(s) to restrict the report to requests matching that range.

As this field is a date and time field it should be noted that the time will also be taken into consideration when the search is performed. Dates entered manually (i.e. keyed in) in the “from” and “to” fields will assume a time of 00:00:00 and therefore results may not be what was expected. E.g. if you wish search for all requests lodged from the $1^{st}$ April to the $5^{th}$ April (inclusive) then the from and to date range will need to be $1^{st}$ April to the $6^{th}$ April. Dates selected from the Calendar will assume the current Time.

**Priority**

Entering a priority number will restrict the report to requests that have a matching priority. If the Priority is not to be considered then (none) should be selected.

**History Log – Changed by User**

This field allows a UserID to be entered or selected from the Pop Up.

**History Log – Node Identifier**
This field allows a PC/Terminal/Node to be keyed in to identify the log entry.

**History Log – Action**
This field allows the selection of an Action from the dropdown list. The available options are as follows:

- (All)
- Created
- Deleted
- Linked
- Unlinked
- Updated
- Viewed
- Printed

**History Log – Date and Time**
These fields allow a date range to be entered over which to run the report.

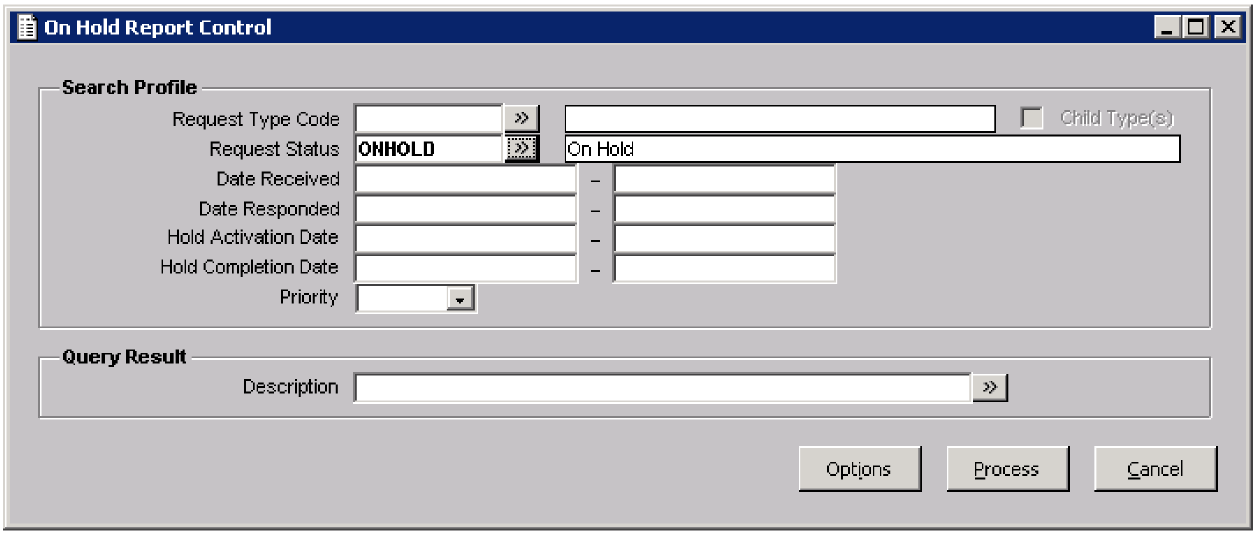
**History Log – Display Sequence**
This field allows the user to select a Display Sequence for the report. The options available are as follows:

- Date and Time, Milliseconds
- UserID, Date and Time, Milliseconds

In addition the user is able to select either ascending or descending order. The default is 'Descending'.

# On Hold Report

A new On Hold Report has been defined within the Smart and Thick Client, which allows selection by Request Type, Status (restricted to On Hold Status codes only), Date Ranges and Priority. All search fields are optional.




Once the Search Profile options have been set as required, press the Process button. You will then be prompted to type in a Description, choose a Run Type and Printer.

An e-mail will be sent to the person who submitted the Report listing the submission time details, search criteria and number of matching Requests.

The report can be run with or without printing the Header Page.

# Multiple Completion of Requests

The Multiple Completion of Requests function will “complete” all requests that match the search criteria. A Status of Actioned, a completion date and a responsible officer will be written to the selected requests.

For each Request processed, if the Check Tasks flag is set ON, a check for incomplete Tasks will occur. If any incomplete Tasks exist, then the Request will not be completed.

The Multiple Completion of Requests Report will include a list of the Requests that could not be completed due to incomplete Tasks, as well as a list of Requests that were completed as part of the Multiple Completion of Requests Batch Job. Only Requests that were unactioned, and are within the Retrieve Profile, are listed in the Report.

The Multiple Completion of Requests Report also allows previously processed jobs to be reprinted.

This report will also perform a check against the ‘Allow Completion’ indicator of Associated Requests before a Request can be completed.

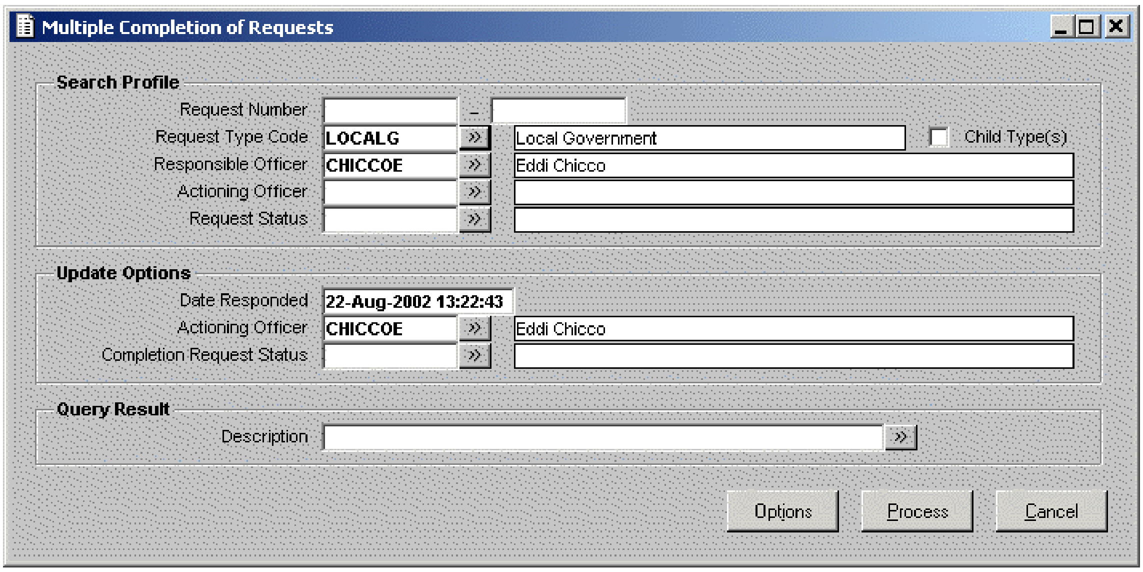
The Multiple Completion of Requests batch function will check if a Request is locked or not during the update processing. A warning message is included in the completion email if some Requests could not be updated because they were locked (regardless of who locked it).

## Multiple Completion of Requests Form

The Multiple Completion of Requests function will “complete” all requests that match the search criteria. A Status of Actioned, a Date Responded, System Completion Date, and a responsible officer will be written to the selected requests.

If you are using Work Flow with Customer Service then generally the Request would be completed once all Tasks are completed.

There are two sections to the generated report. Section 1 details all requests that have been made Complete. Section 2 details all requests that fell within the search criteria however could not be completed due to outstanding work flow tasks and the Check Tasks flag has been set to ON for the Request Type.



*Multiple Completion of Requests Form*

**Request Number**

Enter a “from” and “to” request number range to restrict the process to a specific range of requests.

**Request Type Code**

Enter a valid Request Type into the field or alternatively press the pop up button associated with the field to select from a list. The full description of the request type will be displayed.

Entering a request type into this field will restrict the process to only requests that have a matching request type. For example selecting a request type of Barking Dog will only complete requests of that nature.

**Child Type(s)**

This flag will become available once the Request Type is entered on the form. It allows Child Request Types to be included in the search profile.

**Responsible Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the process to only requests that have a matching user id in the Responsible Officer field on the request.

**Actioning Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

Entering a user id into this field will restrict the process to only requests that have a matching user id in the Actioning Officer field on the request.

**Request Status**

Enter a valid Request Status into this field, or, alternatively, select the pop up button associated with the field to select from a list.

Entering a Request Status into this field will restrict the process to only requests that have a matching Request Status on the request.

**Functionality applicable to the Authorised Function: ‘Status Codes at Request Type Level’.**

New functionality has been added for the ‘Request Status’ and ‘Completion Status’ fields when a ‘Request Type Code’ is nominated.

If the new authorised function ‘Status Codes at Request Type Level’ is authorised

For the ‘Request Status’ field

- If one or more Status Codes has been assigned to the selected Request Type, then only those Status Codes with ‘Completed’ set to ‘No’ that have been assigned to the Request Type will be valid and will display in the Pop Up form.
- (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status Codes with ‘Completed’ set to ‘No’ will be valid / displayed in the Pop Up form)

For the ‘Completion Status’ field

- If one or more Status Codes has been assigned to the selected Request Type, then only those Status Codes with ‘Completed’ set to ‘Yes’ that have been assigned to the Request Type at the parameter level will be valid and will display in the Pop Up form.
- (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes with ‘Completed’ set to ‘Yes’ will be valid / displayed in the Pop Up form)

Where the site does not have authority to the new functionality

For the ‘Request Status’ field

- Existing functionality will apply – i.e. all Status Codes with ‘Completed’ set to ‘No’ will be valid / displayed in the Pop Up form)

For the ‘Completion Status’ field

- Existing functionality will apply – i.e. all Status Codes with ‘Completed’ set to ‘Yes’ will be valid / displayed in the Pop Up form)

Note: When this process is run, and the Status Code nominated as the ‘Completion Status’ is not valid for the Request Type of a Request, the Request will not be updated with the ‘Status Code’ nominated as the ‘Completion Status’ and an exception will be printed on the report.

**Update Options - Date Responded**

Enter a date and time that will be recorded against the Requests that will be marked as completed. This date and time will be written to the “Date Responded” field.

This field is mandatory.

**Update Options - Actioning Officer**

Enter a valid User ID into the field or alternatively press the pop up button associated with the field to select from a list. The full name of the user will be displayed.

The officer name entered into this field will be written as the Actioning Officer on each of the completed requests.

This field is mandatory.

**Update Options - Completion Request Status**

Enter a valid Request Status into this field or, alternatively, select one from the Pop Up. Only Request Statuses which have a status of Completed are available for selection in this form.

When the Multiple Completion of Requests function is run, a ‘completed’ Status, a completion Date and a Responsible Officer will be written to the selected Requests.

**Query Result - Description**

The user may select from a predefined query result to base the Multiple Completion of Requests on. The Query Result is used in place of the Search Profile selected options not in conjunction with them.

The Description field allows the user to enter the name of the Query if known, or use the Pop Up Button to select from a list of pre-defined Queries based on the Customer Service Module.

# Purging Requests

The Purging Requests function will delete all requests from the database that match the search profile. Only Actioned requests are purged. It is recommended that the function be run in "Report Only" mode first and the report is checked for accuracy prior to running in "Update" mode.

The details of any Tasks associated with the Request(s) being purged will be displayed in the Report.

A check will also be made to determine if any Associated Requests are not completed. If these exist then the deletion of the Request will not be allowed.

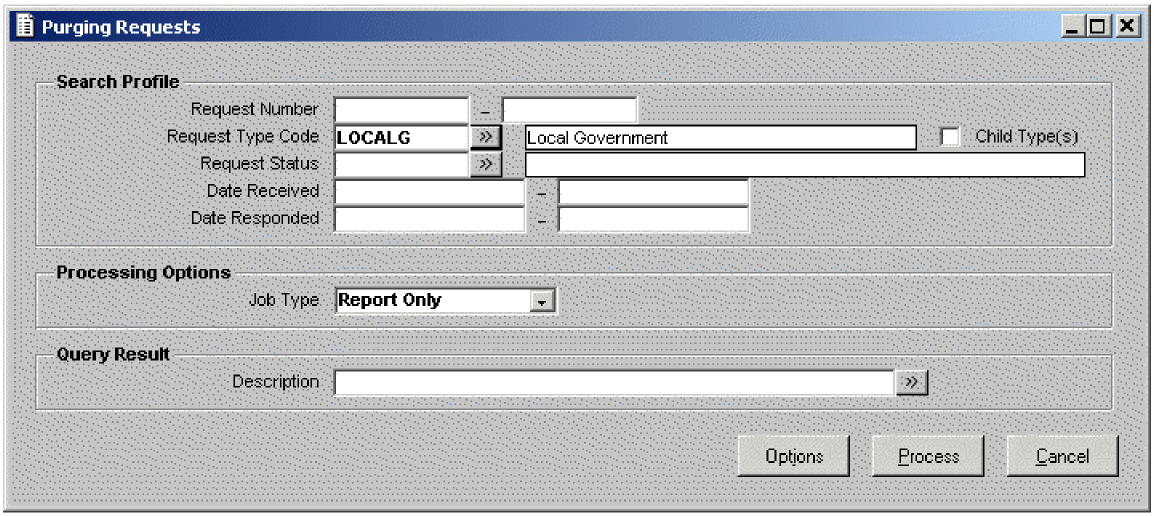
## Purging Requests Form

The Purging Requests function will delete all requests from the database that match the search profile. Only Actioned requests are purged. It is recommended that the function be run in "Report Only" mode first and the report is checked for accuracy prior to running in "Update" mode.

If Work flow is being used and the Check Tasks flag is set OFF then all Tasks associated with the Requests will also be purged regardless of their completion status.

If The Check Tasks flag is set ON for a particular Request Type and incomplete Tasks exist, then these Requests will not be purged as their Request Status is not set to 'Actioned''.

A check will also be made to determine if any Associated Requests are not completed. If these exist then the deletion of the Request will not be allowed.




*Purging Requests Form*

### Request Number

Enter a "from" and "to" request number range to restrict the process to a specific range of requests.

Only requests received within the nominated request number range will be purged.

### Request Type Code

Enter a specific request type to be purged. The code may be entered directly or alternatively press the pop up button associated with the field.

If a request type is nominated then only requests with the nominated request type will be purged.

**Child Type(s)**
This flag will become available once the Request Type is entered on this form. It allows Child Request Types to be included in the purge.

**Request Status**

This field allows the user to select a specific request status for the purge function. The options which are available from the Pop Up will only include Statuses with a Completion Status of 'Yes'. Note that Unactioned requests may not be purged.

Note: As of Release 3.04, the Status field may be left blank to include all Completed Statuses.

**Functionality applicable to the authorised function: 'Status Codes at Request Type Level'.**

New functionality has been added (in Release 3.03) for the 'Request Status' field when a 'Request Type Code' is nominated.

If the Authorised Function is authorised

- If one or more Status Codes has been assigned to the selected Request Type, then only those Status Codes with 'Completed' set to 'Yes' that have been assigned to the Request Type will be valid and will display in the Pop Up form.
- (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes with 'Completed' set to 'Yes' will be valid/displayed in the Pop Up form)

Where the site does not have authority to the new functionality

- Existing functionality will apply – i.e. all Status Codes with 'Completed' set to 'Yes' will be valid/displayed in the Pop Up form)

**Date Received**

Enter a "from" and "to" received date range to restrict the process to a specific range of requests.

If a date range is nominated then only requests received within the date range will be purged.

**Date Responded**

Enter a "from" and "to" responded date range to restrict the process to a specific range of requests.

If a date range is nominated then only requests that have a Date Responded within the date range will be purged.

**Processing Options**

The Processing Options allow the user to select from the options in the drop down list: - Report only or Update and Report.

The Report only option allows the user to produce a report to ensure that they are happy with the Requests that are to be purged.

The Report and Update option when selected and processed will both purge the selected Requests and produce a report as well.

**Query Result - Description**

The user may select from a predefined query result to base the Purge Requests on. The Query Result may used in place of the Search Profile selected options not in conjunction with them.

The Description field allows the user to enter the name of the Query if known, or use the Pop Up Button to select from a list of pre-defined Queries based on the Customer Service Module.

# Automatic Priority Escalation

Priority Escalation is a job that can be scheduled by users to run either on a server or a nominated PC. Users are able to manually stop and start the Priority Escalation Process. Users have the option of scheduling the Priority Escalation Process to start and end automatically. Where the process is started automatically users have the option of setting the start and end times of the process. Users are able to view the jobs that are on the queue at any time.

To determine if a request needs to be escalated the following criteria is used:

- The request must be of a Request Type which has Priority Escalation set on.
- The request must be set to a Non-Completion Status.
- The last date/time that Priority Escalation occurred is used to determine if the priority on the request should be updated.

If the escalation units against a priority are not set or zero then there will be no escalation against a request with a priority of that level.

A request will be selected for priority escalation when the last date that priority escalation occurred plus the escalation time units for the priority is less that the current date and time. The Customer Service Calendar and the Calendar Format will be taken into account when determining which requests should have the priority escalated.

For example:
Request Type of “DEBRIS”.
Notify Responsible Officer is set on.
The Request Type has the Calendar Format set to Working Days and Customer Service is using a calendar where there are no public holidays and weekends are non-working days. The working day is flagged as 9am to 5pm.

- Priority 1

Escalation time Unit : 4 hours
Users to Notify : CEO, Department Manager

- Priority 2

Escalation time Unit : 2 days
Users to Notify : Department Manager

- Priority 3

Escalation time Unit : 5 days
Users to Notify : Work Crew Team Leader, Department Manager

- Priority 4

Escalation time Unit : 15 days
Users to Notify : Work Crew Team Leader

- Priority 5
- Escalation time Unit : 30 days

There are five requests in the system with a Request Type of “DEBRIS”.

- Request 1

Priority : 1
Date Lodged : 14/01/2000 9:50 am
Date Priority was last updated : 14/01/2000 9:50 am

- Request 2

Priority : 2
Date Lodged : 13/01/2000 11:00 am
Date Priority was last updated : 13/01/2000 11:00 am

- Request 3

Priority : 3
Date Lodged : 14/01/2000 4:00 p.m.
Date Priority was last updated : 14/01/2000 4:00 p.m.

- Request 4

Priority : 4
Date Lodged : 04/01/2000 9:00 am
Date Priority was last updated : 04/01/2000 9:00 am

- Request 5

Priority : 5
Date Lodged : 14/01/2000 10:00 am
Date Priority was last updated : 14/01/2000 10:00 am

The priority escalation process will update the priorities on the above requests with the following results.

- Request 1

Priority : 1
Date Lodged : 14/01/2000 9:50 am
Date Priority was last updated : 14/01/2000 1:50 p.m.
Responsible Officer is e-mailed.
CEO & Department Manager e-mailed with the re-notification message.

- Request 2

Priority : 1
Date Lodged : 13/01/2000 11:00 am
Date Priority was last updated : 17/01/2000 11:00 am (as the 15th & 16th are a weekend).
Responsible Officer is e-mailed.
CEO & Department Manager e-mailed with the Priority Updated message.

- Request 3

Priority : 2
Date Lodged : 14/01/2000 4:00 p.m.
Date Priority was last updated : 21/01/2000 4:00 p.m.
Responsible Officer is e-mailed.
Department Manager e-mailed with the Priority Updated message.

- Request 4

Priority : 3
Date Lodged : 04/01/2000 9:00 am
Date Priority was last updated : 04/02/2000 9:00 am
Responsible Officer is e-mailed.
Work Crew Team Leader & Department Manager e-mailed with the Priority Updated message.

- Request 5

Priority : 4
Date Lodged : 14/01/2000 10:00 am
Date Priority was last updated : 25/02/2000 10:00 am
Responsible Officer is e-mailed.
Work Crew Team Leader e-mailed with the Priority Updated message.

On a secondary iteration the following would be produced.

- Request 1

Priority : 1

Date Lodged : 14/01/2000 9:50 am
Date Priority was last updated : 17/01/2000 9:50 a.m.
Responsible Officer is e-mailed. CEO & Department Manager e-mailed with the re-notification message.

- Request 2

Priority : 1
Date Lodged : 13/01/2000 11:00 am
Date Priority was last updated : 17/01/2000 3:00 p.m. (as the 15th & 16th are a weekend).
Responsible Officer is e-mailed.
CEO & Department Manager e-mailed with the re-notification message.

- Request 3

Priority : 2
Date Lodged : 14/01/2000 4:00 p.m.
Date Priority was last updated : 23/01/2000 4:00 p.m.
Responsible Officer is e-mailed.
Department Manager e-mailed with the Priority Updated message.

- Request 4

Priority : 2
Date Lodged : 04/01/2000 9:00 am
Date Priority was last updated : 11/02/2000 9:00 am
Responsible Officer is e-mailed.
Department Manager e-mailed with the Priority Updated message.

- Request 5

Priority : 3
Date Lodged : 14/01/2000 10:00 am
Date Priority was last updated : 17/03/2000 10:00 am
Responsible Officer is e-mailed.
Work Crew Team Leader & Department Manager e-mailed with the Priority Updated message.

## Automatic Priority Escalation Form

The Automatic Priority Escalation form allows the Priority Escalation Process to be defined and run either interactively or scheduled to be run at a later time.

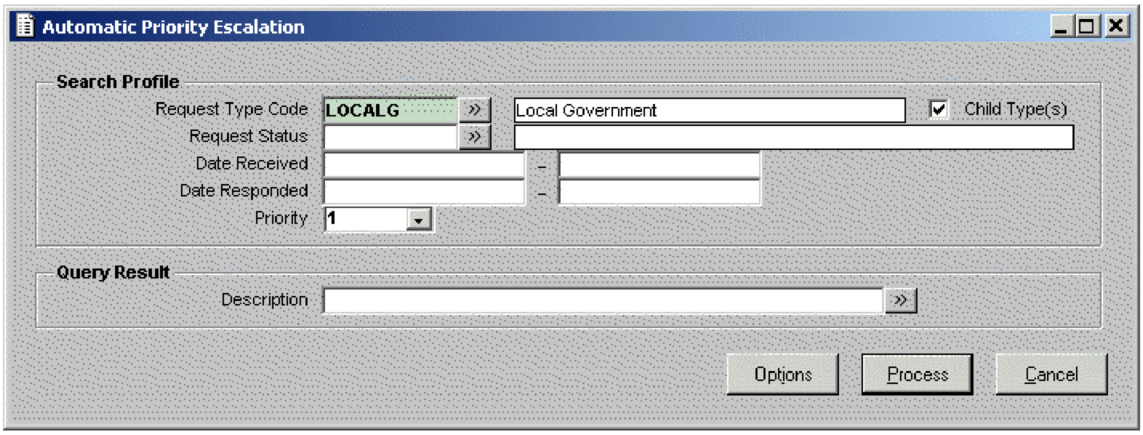
The Automatic Priority Escalation batch function will check if a Request is locked or not during the escalation processing.  There is a warning in the completion email if some Requests could not be escalated because they were locked. A message ‘Request xxx is locked and cannot be updated’ is printed in the message log when a locked Request is encountered.

When the escalation is due and a given Request is locked, it is not updated. The email for a locked Request due for escalation mentions that another attempt will be made to escalate the Request when Automatic Priority Escalation is next run.

### Background Request Escalation

The Background Request Escalation function will also check if a Request is locked or not during the escalation processing.

When an escalation is due and a given Request is locked, it is not updated. The email for a locked Request due for escalation will mention that another attempt will be made to escalate the Request in 30 minutes.




*Automatic Priority Escalation Form*

### Request Type Code

Enter a Request Type Code, if known, or alternatively, one can be selected from the Pop Up.

### Child Type(s)

This flag will become available once the Request Type is entered on the Search Profile form.  It allows Child Request Types to be included in the search.

### Request Status

Enter a Request Status, if known, or alternatively, one can be selected from the Pop Up. Only Statuses of ‘Incomplete’ will be available for selection from the Pop Up.

**Functionality applicable to the Authorised Function: ‘Status Codes at Request Type Level’.**

New functionality has been added for the ‘Request Status’ field when a ‘Request Type Code’ is nominated.

If the Authorised Function is authorised

- If one or more Status Codes has been assigned to the selected Request Type, then only those Status Codes with ‘Completed’ set to ‘No’ that have been assigned to the Request Type will be valid and will display in the Pop Up form.
- (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes with ‘Completed’ set to ‘No’ will be valid/displayed in the Pop Up form)

Where the site does not have authority to the new functionality

- Existing functionality will apply – i.e. all Status Codes with ‘Completed’ set to ‘No’ will be valid/displayed in the Pop Up form)

**Date Received**

A date range may be entered in these fields to process Request Types created within that date range.

As these Date fields are Date/Time fields, dates entered will assume a time of 00:00:00.

A date may be keyed in, or alternatively, by double-clicking in the field or pressing F2, a date can be selected from the Calendar Pop Up. Valid date formats are:
01-May-2000
010500
01052000
1/5/00
1.5.00

**Example:**
Entering a date range of 28/3/99 to 30/3/99 will only return results where the Date is between 28/3/99 00:00:00 and 30/3/99 00:00:00. Which will effectively be those records for the 28th and 29th March only.

**Date Responded**

A date range may be entered in these fields to process Request Types where the Date Responded lies within that date range.

As these Date fields are Date/Time fields, dates entered will assume a time of 00:00:00.

A date may be keyed in, or alternatively, by double-clicking in the field or pressing F2, a date can be selected from the Calendar Pop Up. Valid date formats are:
01-May-2000
010500
01052000
1/5/00
1.5.00

**Example:**
Entering a date range of 28/3/99 to 30/3/99 will only return results where the Date is between 28/3/99 00:00:00 and 30/3/99 00:00:00. Which will effectively be those records for the 28th and 29th March only.

**Priority**

Select a Priority value from the drop-down. Each Priority value needs to be processed separately, i.e. the user is unable to process all Priority levels in a single job.

**Query Result - Description**

The Query Result is used in place of the Search Profile selected options not in conjunction with them.
The Description field allows the user to enter the name of the Query if known, or use the Pop Up Button to select from a list of pre-defined Queries based on the Customer Service Module.

# Responsible Officer Reassignment

The Customer Service module now provides the ability to update the Actioning and Responsible Officers of Requests. The process allows the update of Request Type Parameters, open Requests, Task Type Parameter settings and open Tasks.

*How it works:*

***Updating Responsible Officer on Request Type(s)***
If you want to update any Request Types, specify the Responsible Officer and / or Replacement Officer and tick the ‘Update Request Types’ option.

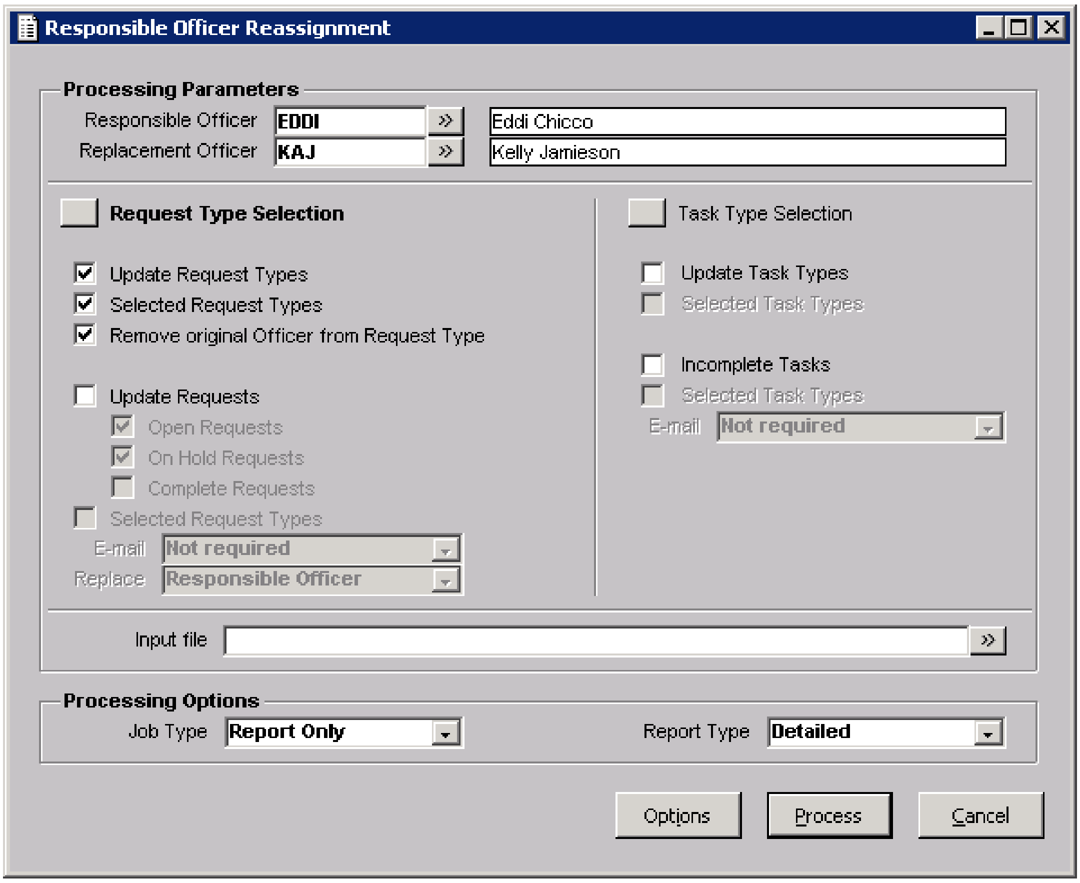
If both the Responsible Officer and Replacement Officer are provided, all the settings of the Responsible Officer will be copied to the Replacement Officer. Also the original Responsible Officer will be removed if the ‘Remove original Officer from Request Type’ is ticked otherwise the officer will remain.

If only the Responsible Officer is provided, the Responsible Officer will be removed against the selected Request Type(s) if the ‘Remove original Officer from Request Type’ it ticked.

If only the Replacement Officer is provided, the Replacement Officer will be added as a Responsible Officer against the selected Request Type(s) (but only if the Replacement Officer has not been not assigned before).

To update specific Request Types, in addition to the steps above, detail out on the ‘Request Type Selection’ option button to select or remove the Request Types required. You must also tick the ‘Selected Request Types’ option (otherwise it will ignore the ‘Request Type Selection’ made and update all Request Types matching the nominated officers).

This process can be run in ‘Report only’ mode or ‘Update and Report’ mode.



*Responsible Officer Reassignment Control showing settings for Request Type processing*

***Updating an Open Request***

The ability to update the Responsible Officer and Actioning Officer of Open, On Hold and / or Complete Request(s) has been made available.

Both Responsible Officer and Replacement Officer are mandatory when updating Requests.

Users are able to choose which type of Request to update (Open, On Hold and / or Complete requests).

Users can also select the replacement option (the request's Responsible Officer, Actioning Officer or Both).

To update Request linked to specific Request Types, detail out on the 'Request Type Selection' option button to select or remove the Request Types required. You must also tick the 'Selected Request Types' option below the 'Update Requests' option (otherwise it will ignore the 'Request Type Selection' made and update all Request matching the nominated officers).

This process can be run in 'Report only' mode or 'Update and Report' mode.

If this process is run in 'Update and Report' mode, users will be able to nominate their E-mail options as follows:

- *Option : Not Required*

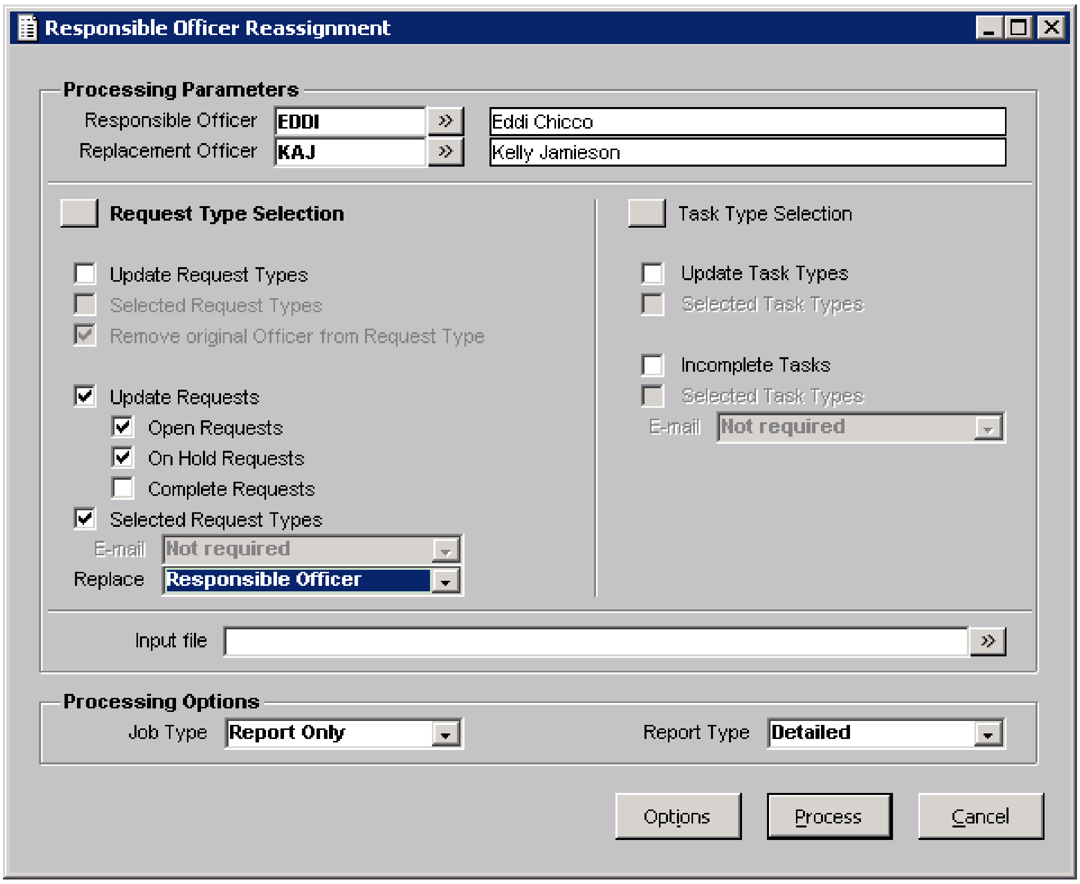
This option does not send email to the Replacement Officer regarding the new replacement.

- *Option : Individual Request*

This option sends an email to the Replacement Officer for every Open Request Updated.

- *Option : Summary*

At end of the processing, an email will be sent to the Replacement Officer with all the Open Requests updated.



*Responsible Officer Reassignment Control showing settings for processing open requests as well as Request Types*

***Updating the Default Responsible Officer of Workflow Customer Service Task Types***

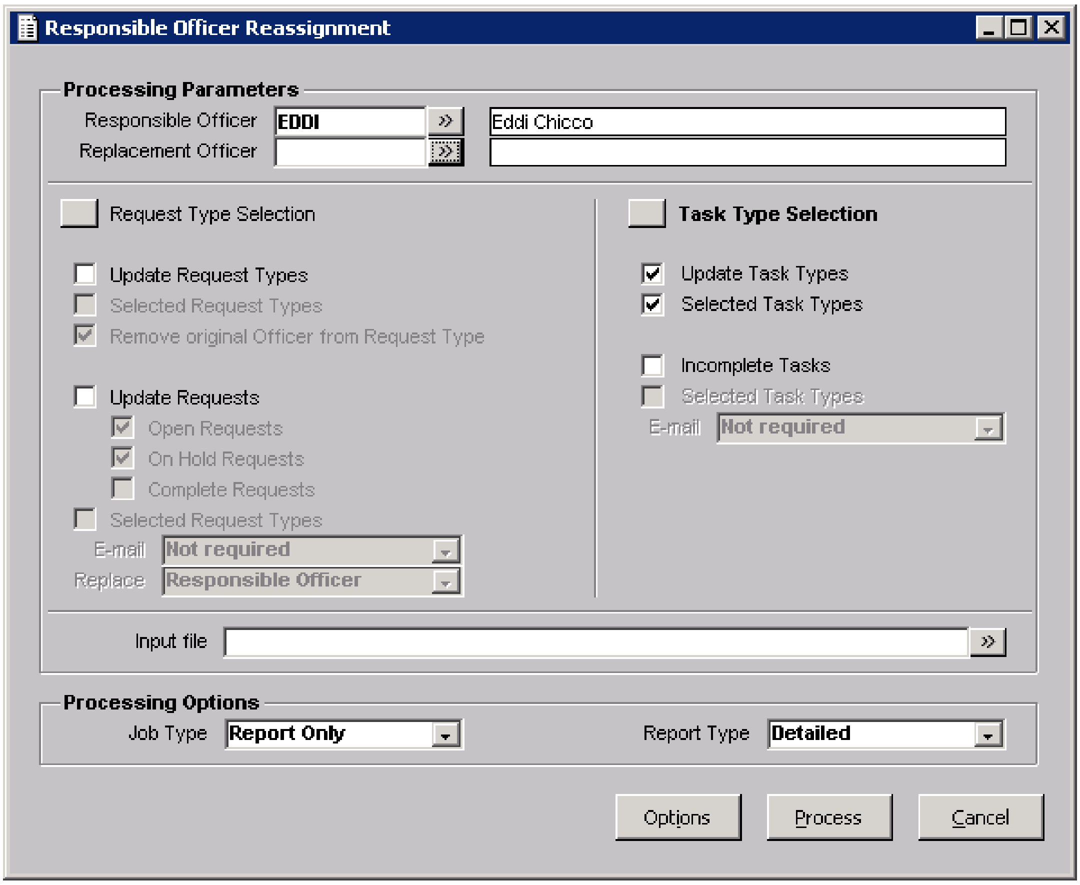
The ability to nominate the Customer Service Workflow Task Types that need to be updated has been made available.

Only the Responsible Officer field is required for this process (the Replacement Officer is not required). During this processing, if the default Responsible Officer of the Task Types match the nominated Responsible Officer, the default Responsible Officer will be removed so there will be no default Responsible Officer for the Task Types.

If you want to update any Workflow Task Type, specify the Responsible Officer and tick the ‘Update Task Types’ option.

To update specific Workflow Task Types, in addition to the steps above, detail out on the ‘Task Type Selection’ option button to select or remove the Task Types required.  You must also tick the ‘Selected Task Types’ option (otherwise it will ignore the ‘Task Type Selection’ made and update all Task Tasks matching the nominated officer).

This process can be run in ‘Report only’ mode or ‘Update and Report’ mode.



*Responsible Officer Reassignment Control showing Workflow Task Type processing*

***Updating the Responsible Officer of Workflow Customer Service Incomplete Tasks***

The ability to update the Responsible Officer of Incomplete Tasks has been made available.

Both the Responsible Officer and Replacement Officer are mandatory when updating Incomplete Tasks.

During the processing, if the Replacement Officer is not defined in the Task Responsibility Structure and Group, an error will be reported and the original Task Responsible Officer will not be replaced or removed.

If you want to update the Workflow Task Types on any Incomplete Task, specify the Responsible Officer and Replacement Officer and tick the 'Incomplete Tasks' option.

To update specific Workflow Task Types, in addition to the steps above, detail out on the 'Task Type Selection' option button to select or remove the Task Types required. You must also tick the 'Selected Task Types' option below the 'Incomplete Tasks' option (otherwise it will ignore the 'Task Type Selection' made and update all Task Tasks matching the nominated officers).

This process can be run in 'Report only' mode or 'Update and Report' mode.

If this process runs in 'Update and Report' mode, users will be able to nominate their email options as follows:

- *Option : Not Required*

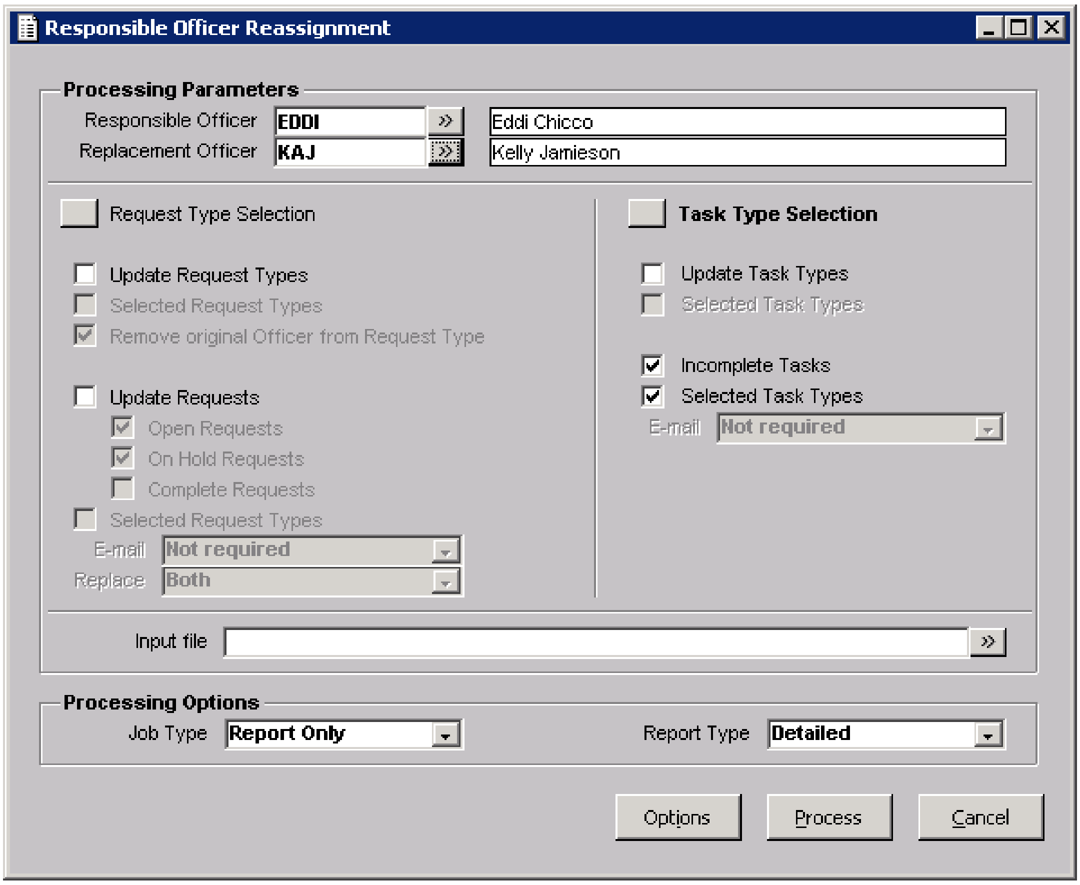
This option does not send email to the Replacement Officer regarding the new replacement.

- *Option : Individual Task*

This option sends an email to the Replacement Officer for every Incomplete Task Updated.

- *Option : Summary*

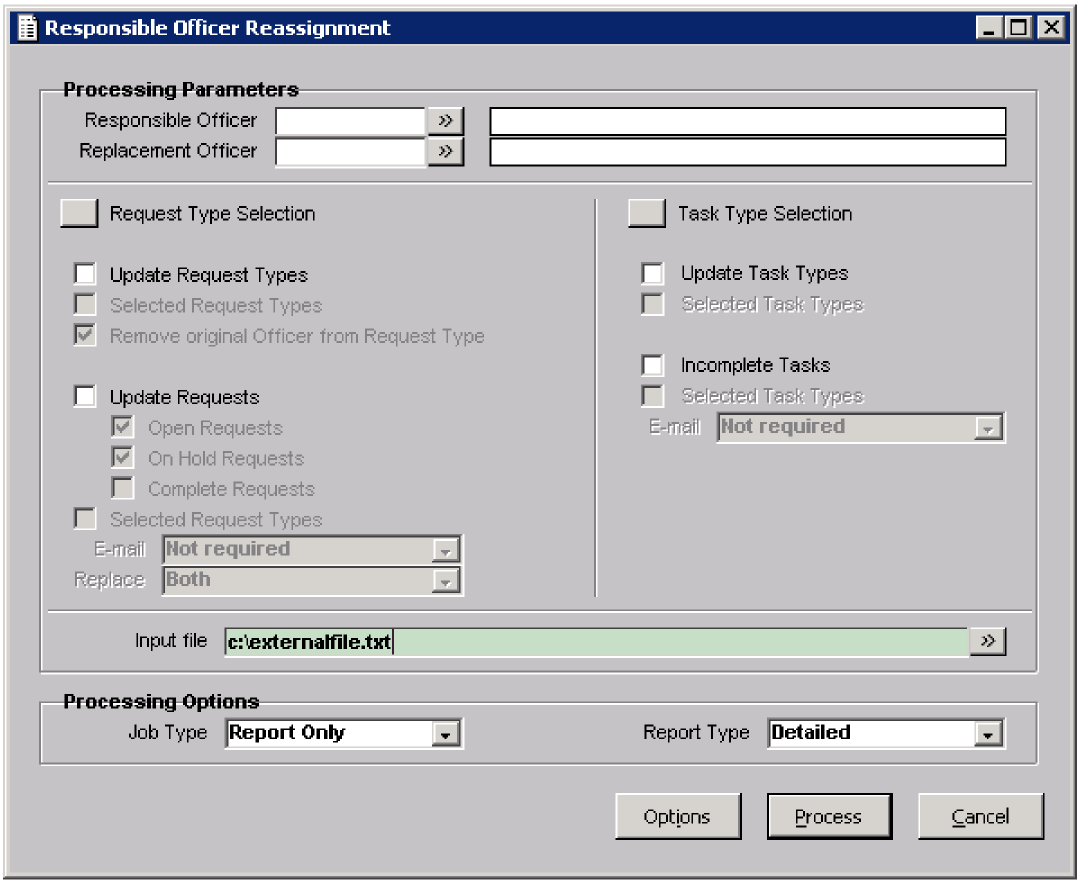
At end of the processing, an email will be sent to the Replacement Officer listing all the Incomplete Tasks updated.




*Responsible Officer Reassignment Control showing Workflow incomplete Task processing*

***Updating using an External File***

The ability to update the various officer details from an external file has been made available. Users are able to take an external file produced from an external source and update the officer details.



*Responsible Officer Reassignment Control showing External file processing*

The input file must be in CSV format (without field names – fields would be determined by position). The layout of the input file is defined by the following:

| Field | Field Name | Description | Valid Values | Notes |
|---|---|---|---|---|
| Field 1 | Responsible Officer | Old Responsible Officer to be replaced | Valid Pathway Uer ID | Mandatory when updating Open Requests, Task Type and Tasks |
| Field 2 | Replacement Officer | New Responsible Officer. | Valid Pathway Uer ID | Mandatory when updating Open Requests and Tasks |
| Field 3 | Update Request Types Flag | Update Request Type Responsible Officer | Y<br>N | Mandatory<br>Y – Yes<br>N - No |
| Field 4 | No. of Request Types | Total count of Request Types to update | Numeric | Mandatory<br>0 if not required to update Request Type |
| Next field | Request Type Codes | A list of Request Type Codes separated by comma | Valid Request Type Codes. | Mandatory when updating Request Types |
| Next field | Selected Request Types Flag | Update Open Requests under the supplied Request Type Codes | Y<br>N | Mandatory<br>Y - Yes<br>N – No |
| Next field | Update Open Requests Flag | Update Open Requests | Y<br>N | Mandatory<br>Y – Yes<br>N – No |
| Next field | Email option for Open Requests | Email to new Responsible Officer option | N<br>R<br>S | Mandatory<br>N - Not required<br>R – Every Request updated |

| | | | | |
|---|---|---|---|---|
| | | | | S - Summary update Information sent at end of process |
| Next field | Replacement Option | Replace Responsible Officer, Actioning Officer or Both. | A<br>R<br>B | Mandatory<br>A – Replace Actioning Officer only<br>R – Replace Responsible Officer<br>B –Replace Both |
| Next field | Update Task Types flag | Remove Customer Service Task Type Responsible Officer | Y<br>N | Mandatory<br>Y - Yes<br>N – No |
| Next field | No. of Task Types | Total count of Task Types | Numeric | mandatory<br>0 if not required to update Task Types |
| Next field | Task Type Codes | A list of Request Type Codes separated by comma | Valid Task Type Code | Mandatory when updating Task Types |
| Next field | Selected Task Type flag | Update Incomplete Tasks under the supplied Task Type Codes. | Y<br>N | Mandatory<br>Y - Yes<br>N - No |
| Next field | Update Incomplete Tasks flag | Update Incomplete Task Responsible Officer | Y<br>N | Mandatory<br>Y - Yes<br>N - No |
| Next field | Email Option for Incomplete Tasks | Email to new Responsible Officer option | N<br>T<br>S | Mandatory<br>N – Not required<br>T – Every Task Updated<br>S – Summary update Information sent at end of process |

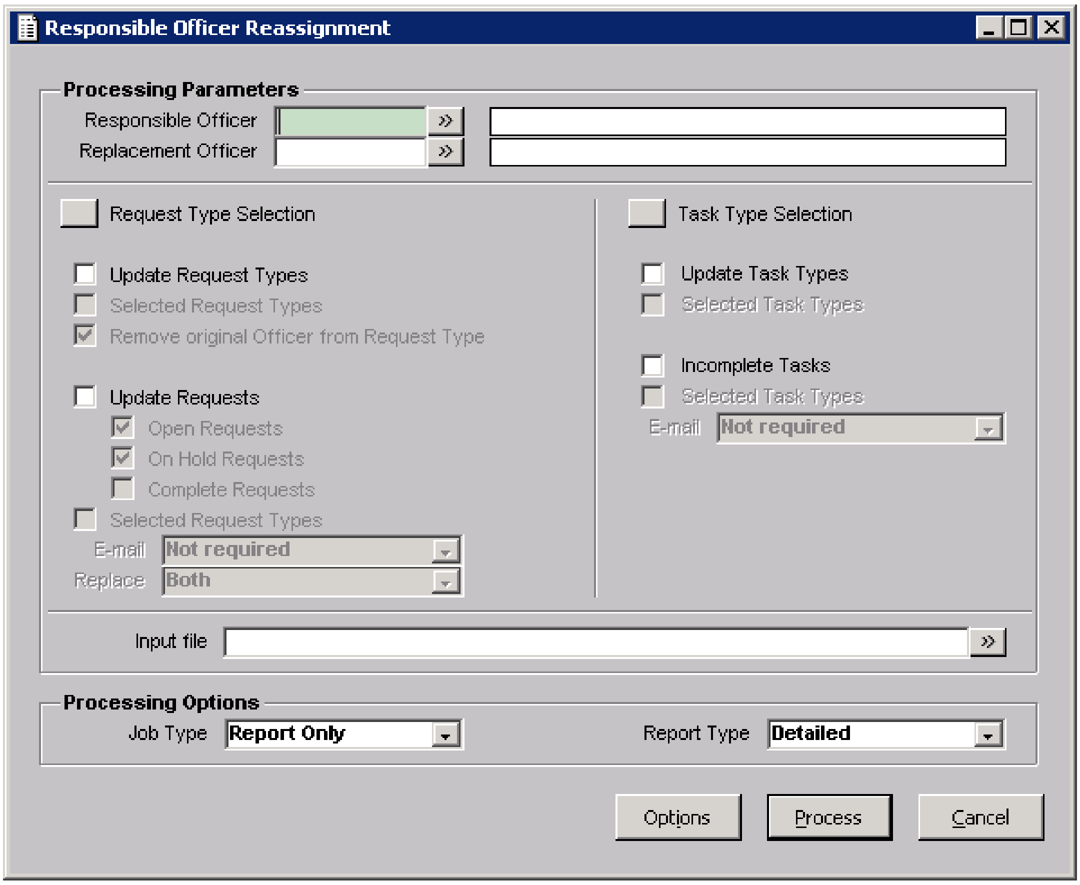
Sample file

HELIU,TLIAK,Y,3,ALLMOD,TL,HL,Y,Y,S,B,Y,3,ASSET,EMAIL,XITSKT,N,Y,S
SDREW,TLIAK,N,0,N,Y,R,A,Y,3,CBACK,LETTER,BANK,Y,Y,S

## Responsible Officer Reassignment Form

This form provides the user with the ability to update Responsible Officers and/or Actioning Officers in selected Request Types as well as in open Requests. In addition it allows the Responsible Officer to be updated in Workflow Task Types as well as in uncompleted Tasks.
For a detailed description of this functionality please refer to the section on Responsible Officer Reassignment (272).

The Responsible Officer Reassignment batch function will check if a Request is locked or not during the update processing. A warning message is included in the completion email if some Requests could not be updated because they were locked (regardless of who locked it). And a message ‘Request xxx is locked and cannot be updated’ is printed on the message log when a locked Request is encountered. Refer to the section on Request Locking (148) for further details.




*Responsible Officer Reassignment Form*

**Processing Parameters – Responsible Officer**

These fields allow a valid user to be keyed in or selected from the Pop Up as the Responsible Officer. Once selected or entered, the description will default into the Description field.

Both the Responsible Officer and Replacement Officer are mandatory when updating Incomplete Tasks. During the processing, if the Replacement Officer is not defined in the Task Responsibility Structure and Group, an error will be reported and the original Task Responsible Officer will not be replaced or removed.

Similarly, if the Responsible Officer and Replacement Officer are the same, an error message will display asking the user to select different users.

**Processing Parameters – Replacement Officer**

These fields allow a valid user to be keyed in or selected from the Pop Up as the Replacement Officer. Once selected or entered, the description will default into the Description field.

Both the Responsible Officer and Replacement Officer are mandatory when updating Incomplete Tasks. During the processing, if the Replacement Officer is not defined in the Task Responsibility Structure and Group, an error will be reported and the original Task Responsible Officer will not be replaced or removed.

**Request Type Selection**

Selecting the Request Type Selection button will take the user to the Request Type Selection form where available Request Types may be selected for inclusion in the Officer Reassignment process.

Note: The field label will become bold if any Request Types have been selected.

**Update Request Types**
The 'Update Request Types' flag should be checked on if Request Types are to be included in the Responsible Officer update.

**Selected Request Types**
The Selected Request Types flag is controlled by the 'Update Request Types' flag along with the 'Request Type Selection' status, i.e. this flag will only be available when the 'Update Request Types' flag is checked on and the 'Request Type Selection' label is bold. Otherwise it will be dimmed and unavailable.

**Remove original Officer from Request Type**
During processing, all of the settings of the Responsible Officer will be copied to the Replacement Officer. If the 'Remove original Officer from Request Type' flag is ticked the Responsible Officer will be removed from the Request Type otherwise if un-ticked, the officer will remain.

**Update Requests**
The 'Update Requests' flag will allow users to update the officers on the requests. To update requests, both the Responsible and Replacement Officers must be specified. When this flag is checked on, it causes the 'Selected Request Types' flag to become available for selection.

**Open Requests**
The 'Open Requests' flag should be checked on when uncompleted Requests are to be included in the Responsible/Actioning Officer replacement process. When this flag is checked on, it causes the 'Selected Request Types' flag to become available for selection.

Example:
If a Request Type has been selected (via the Request Types Selection button), Open Requests has been checked ON and Selected Request Types has also been checked ON, then Officer Replacement will apply to both the Request Type selected (in parameters) and any open Requests of the selected Request Type.

**On Hold Requests**
The 'On Hold Requests' flag should be checked on when uncompleted Requests on hold are to be included in the Responsible/Actioning Officer replacement process.

**Complete Requests**
The 'Complete Requests' flag should be checked on when completed Requests are to be included in the Responsible/Actioning Officer replacement process.

**Selected Request Types**
The Selected Request Types flag is controlled by the 'Open Requests' flag along with the 'Request Type Selection' status, i.e. this flag will only be available when the 'Open Requests' flag is checked on and the 'Request Type Selection' label is bold. Otherwise it will be dimmed and unavailable.

**Email**
This field is controlled by the 'Open Requests' flag as well as the 'Job Type' selection, i.e. only when the 'Open Requests' flag is checked ON and the 'Job Type' is set to 'Update and Report' mode will it become available. Otherwise it is dimmed. The default email option is 'Not Required.'.

If the Officer Replacement process runs in Update and Report mode, users are able to nominate their email options as follows.

- *Option : Not Required*

This option does not send email to the Replacement Officer regarding the new replacement.

- *Option : Individual Task*

This option sends an email to the Replacement Officer for every Open Request Updated.

- *Option : Summary*

At end of the processing, an email will be sent to the Replacement Officer listing all the Open Requests updated.

**Replace**

The 'Replace' option is controlled by the 'Open Requests' flag. If 'Open Requests' is checked ON, then this field will become available. Otherwise it will be dimmed. It allows selection from a dropdown list of the following options:

- Actioning Officer
- Responsible Officer
- Both

The default value is 'Both' (i.e. Actioning Officer and Responsible Officer).

**Task Type Selection**

Selecting the Task Type Selection button will take the user to the Task Type Selection form where available Task Types may be selected for inclusion in the Officer Reassignment process.

If no Task Types are selected, then any processing will apply to ALL Task Types.

If Task Types have been selected and the 'Selected Task Types' flag (for updating Task Types) is on, then the nominated Responsible Officer will be removed from the selected Task Types (if the Replacement Officer is blank).

Note: The field label will become bold if any Task Types have been selected.

**Update Task Types**

This flag controls the removal of the Responsible Officer from Task Types. If no Task Types are selected in 'Task Type Selection', then ALL tasks are targeted. In order that only selected Task Types are processed, then a selection needs to be made in 'Task Type Selection' and the 'Selected Task Types' flag checked ON.

A user must be selected in the Responsible Officer field before updating the Task Type Officer.

**Selected Task Types**

The 'Selected Task Types' flag is controlled by the 'Update Task Types' flag along with the 'Task Type Selection' status, i.e. this flag will only be available when the 'Update Task Types' flag is checked on and the 'Task Type Selection' label is bold. Otherwise it will be dimmed and unavailable.

**Incomplete Tasks**

The 'Incomplete Tasks' flag should be checked on when uncompleted Tasks are to be included in the Responsible/Actioning Officer replacement process. When this flag is checked on, it causes the 'Selected Task Types' flag to become available for selection.

**Selected Task Types**

The 'Selected Task Types' flag is controlled by the 'Incomplete Tasks' flag along with the 'Task Type Selection' status, i.e. this flag will only be available when the 'Incomplete Task Types' flag is checked on and the 'Task Type Selection' label is bold. Otherwise it will be dimmed and unavailable.

**Email**

This field is controlled by the 'Incomplete Tasks' flag as well as the 'Job Type' selection, i.e. only when the 'Incomplete Tasks' flag is checked ON and the 'Job Type' is set to 'Update and Report' mode will it become available. Otherwise it is dimmed. The default email option is 'Not Required.'.

If the Officer Replacement process runs in Update and Report mode, users are able to nominate their email options as follows.

- *Option : Not Required*

This option does not send email to the Replacement Officer regarding the new replacement.

- *Option : Individual Task*

This option sends an email to the Replacement Officer for every Incomplete Task Updated.

- *Option : Summary*

At end of the processing, an email will be sent to the Replacement Officer listing all the Incomplete Tasks updated.

**Input File**

This field allows an external input file to be specified (e.g. externalfile.txt). Users are able to use an external file produced from an external source and update Officer details. The input file must be in CSV format (without field names - as fields will be determined by their position). The layout of the input file will be as follows:

| Field | Field Name | Description | Valid Values | Notes |
|---|---|---|---|---|
| Field 1 | Responsible Officer | Old Responsible Officer to be replaced | Valid Pathway Uer ID | Mandatory when updating Open Requests, Task Type and Tasks |
| Field 2 | Replacement Officer | New Responsible Officer. | Valid Pathway Uer ID | Mandatory when updating Open Requests and Tasks |
| Field 3 | Update Request Types Flag | Update Request Type Responsible Officer | Y<br>N | Mandatory<br>Y – Yes<br>N - No |
| Field 4 | No. of Request Types | Total count of Request Types to update | Numeric | Mandatory<br>0 if not required to update Request Type |
| Next field | Request Type Codes | A list of Request Type Codes separated by comma | Valid Request Type Codes. | Mandatory when updating Request Types |
| Next field | Selected Request Types Flag | Update Open Requests under the supplied Request Type Codes | Y<br>N | Mandatory<br>Y - Yes<br>N – No |
| Next field | Update Open Requests Flag | Update Open Requests | Y<br>N | Mandatory<br>Y – Yes<br>N – No |
| Next field | Email option for Open Requests | Email to new Responsible Officer option | N<br>R<br>S | Mandatory<br>N - Not required<br>R – Every Request updated<br>S - Summary update Informa sent at end of process |
| Next field | Replacement Option | Replace Responsible Officer, Actioning Officer or Both. | A<br>R<br>B | Mandatory<br>A – Replace Actioning Officer only<br>R – Replace Responsible Officer<br>B –Replace Both |
| Next field | Update Task Types flag | Remove Customer Service Task Type Responsible Officer | Y<br>N | Mandatory<br>Y - Yes<br>N – No |
| Next field | No. of Task Types | Total count of Task Types | Numeric | mandatory<br>0 if not required to update Task Types |
| Next field | Task Type Codes | A list of Request Type Codes separated by comma | Valid Task Type Code | Mandatory when updating Task Types |
| Next field | Selected Task Type flag | Update Incomplete Tasks under the supplied Task Type | Y<br>N | Mandatory<br>Y - Yes<br>N - No |

| | | | | |
|---|---|---|---|---|
| | | Codes. | | |
| Next field | Update Incomplete Tasks flag | Update Incomplete Task Responsible Officer | Y<br>N | Mandatory<br>Y - Yes<br>N - No |
| Next field | Email Option for Incomplete Tasks | Email to new Responsible Officer option | N<br>T<br>S | Mandatory<br>N – Not required<br>T – Every Task Updated<br>S – Summary update Informa<br>sent at end of process |

<u>Sample file</u>

SMITHJ,BROWNP,Y,3,ALLMOD,TL,HL,Y,Y,S,B,Y,3,ASSET,EMAIL,XITSKT,N,Y,S
GREENF,HARRISONT,N,0,N,Y,R,A,Y,3,CBACK,LETTER,BANK,Y,Y,S

**Processing Options – Job Type**

The user may choose from the following options:

- Report Only
- Update and Report

If 'Report Only' is selected then reports are generated but no data is updated. If 'Update and Report' is selected, then the Officer Replacements will physically take place as well as the report generation.
The default value for the 'Job Type' field is 'Report Only'.

Note: The email field will only become available when the 'Update and Report' option is selected.

**Processing Options – Report Type**

The user may choose from the following Report Type options:

- Detailed
- Summary

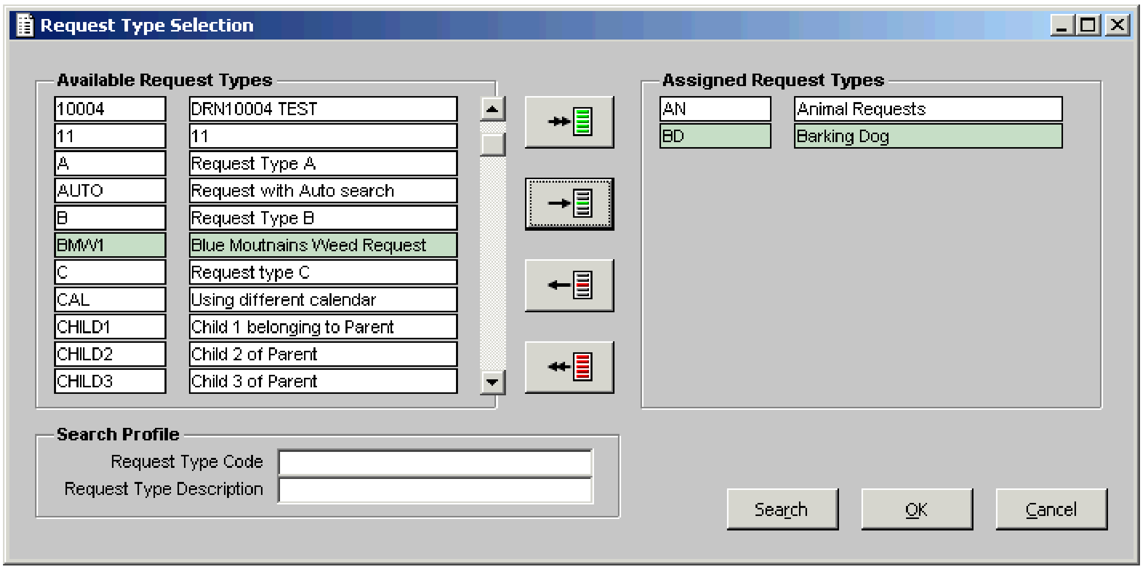
The default value for the 'Report Type' field is 'Detailed'.

'Detailed' report is available for all options. 'Summary' report is only available for Open Requests and Incomplete Tasks, i.e. when the 'Open Requests' and/or 'Incomplete Tasks' flags are checked on, or when using an input file for processing. In these cases both Detailed and Summary options would be available as Report Type options. Otherwise, only the 'Detailed' option is available.

Note: The email field will only become available when the 'Update and Report' option is selected.

## Request Type Selection Form

This form is used to select Request Types for inclusion in the Responsible Officer Reassignment process. The Select and Remove buttons are used to move Request Types from the 'Available' side to the 'Assigned' side of the form.




*Request Type Selection form*

**Available Request Types**

The fields on the left side of the form contain the Request Types which are available for selection.

**Assigned Request Types**

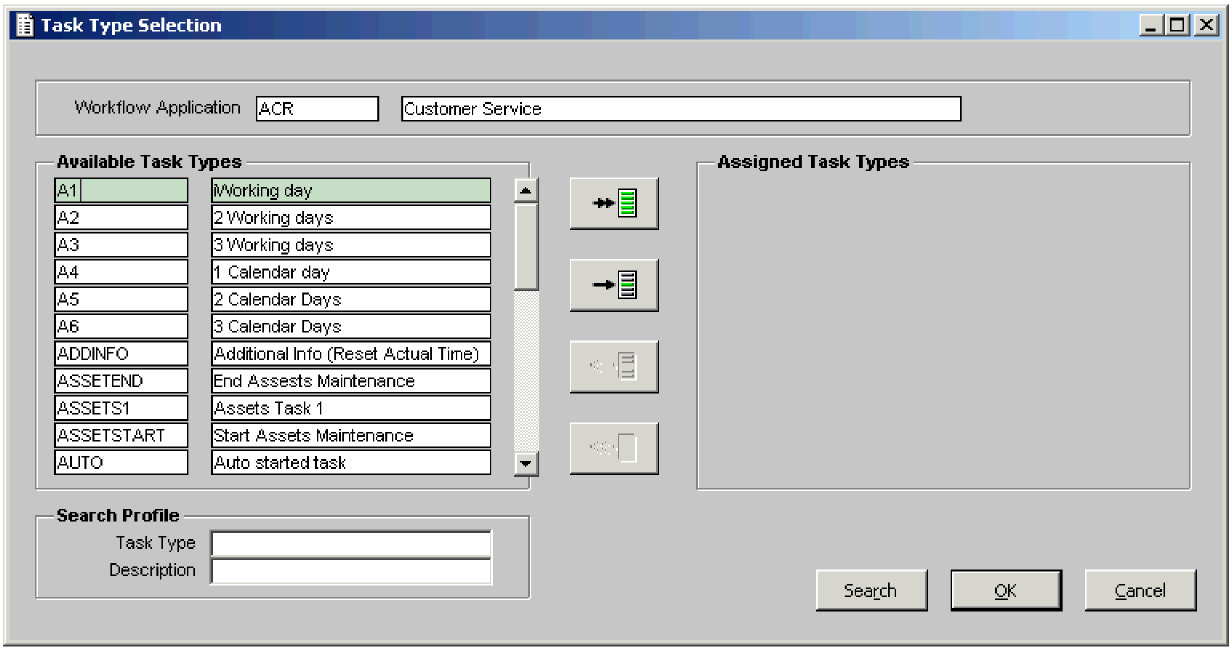
The fields on the right hand side of the form contain the Request Types which have been assigned.

**Search Profile – Request Type Code/Description**

These fields allow the user to enter a Request Type Code and/or Description as a search profile to find a particular Request Type or group of Request Types. This can be useful when there are more than 9 Request Types to search through.

## Task Type Selection form

This form is used to select Task Types for inclusion in the Responsible Officer Reassignment process. The Select and Remove buttons are used to move Task Types from the 'Available' side to the 'Assigned' side of the form.




*Task Type Selection Form*

### Workflow Application

These fields display the Workflow Application Code and Description.

### Available Task Types

The fields on the left side of the form contain the Task Types which are available for selection.

### Assigned Task Types

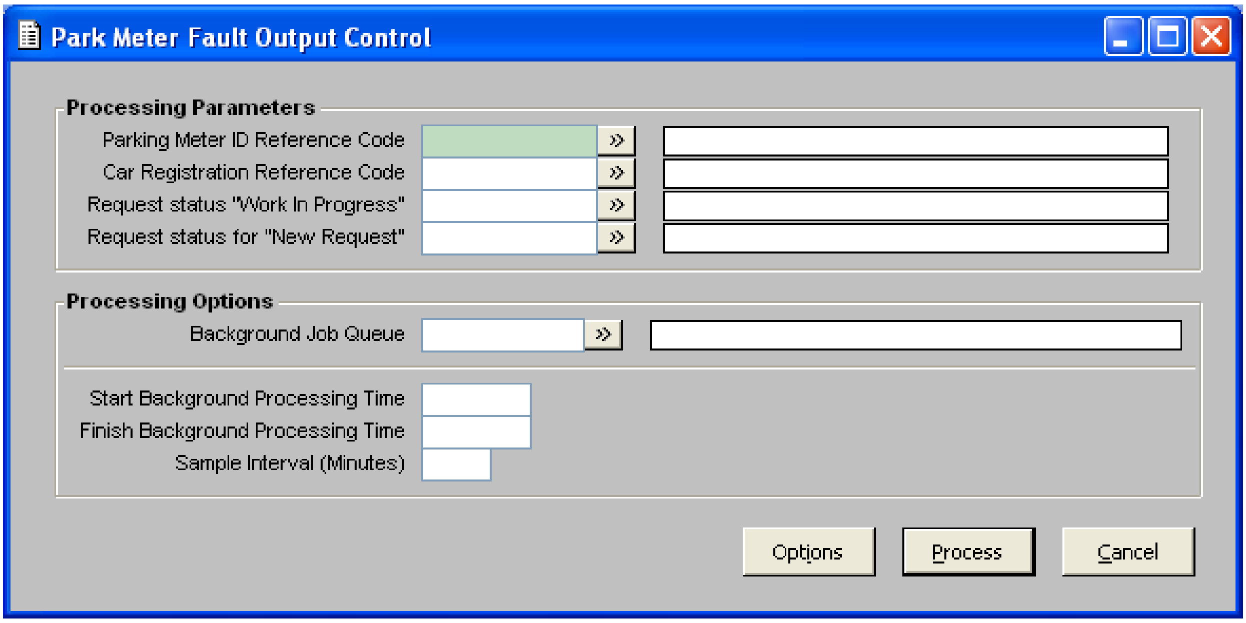
The fields on the right hand side of the form contain the Task Types which have been assigned.

### Search Profile – Task Type/Description

These fields allow the user to enter a Task Type Code and/or Description as a search profile to find a particular Task Type or group of Task Types.  This can be useful when there are more than 9Task Types to search through.

# Reino Parking Meter Maintenance Output Interface

The Customer Service Module provides an Interface to the Reino Parking Meter Maintenance system. Customer Service Requests are logged for faulty or damaged Parking Meters and a file can be periodically downloaded to the Reino Parking Meter Maintenance system.



*Park Meter Fault Output Control form*

**Processing Parameters – Parking Meter ID Reference Code**

Select the Parking Meter ID Reference Code to be used. This must first be set up in the parameters so that it can be selected. The Parking Meter ID Reference Code must to be set to “EQUIPMENT”.

**Processing Parameters – Car Registration Reference Code**

Select the Car Registration Reference Code to be used. This must first be set up in the parameters so that it can be selected. The Car Registration Reference Code must be set to “REGISTRAT”.

**Processing Parameters – Request Status “Work in Progress”**

Select the Request Status “Work in Progress” to be used. This must first be set up in the parameters so that it can be selected. The Request status for “Work in progress” must be set to “WIP”. Once processed by the Output process the Customer Request will have its Request Status set to this.

**Processing Parameters – Request status for “New Request”**

Select the Request Status for a New Request to be used. This must first be set up in the parameters so that it can be selected. The Request status for “New Request” must be set to “NEW”.

**Processing Options – Background Job Queue**

Select the Background Job Queue to be used by this process. A background job queue should be created to be used solely by this process.

**Processing Options – Start Background Processing Time**

Set the Start Background Processing Time for the time to start the processing. A job will be scheduled on the nominated Background Job Queue to commence at this time.

**Processing Options – Finish Background Processing Time**

Set the Finish Background Processing Time for the time to stop the processing. Jobs will stop being scheduled on the nominated Background Job Queue after this time. The Background Job Queues will however not be stopped at this time.

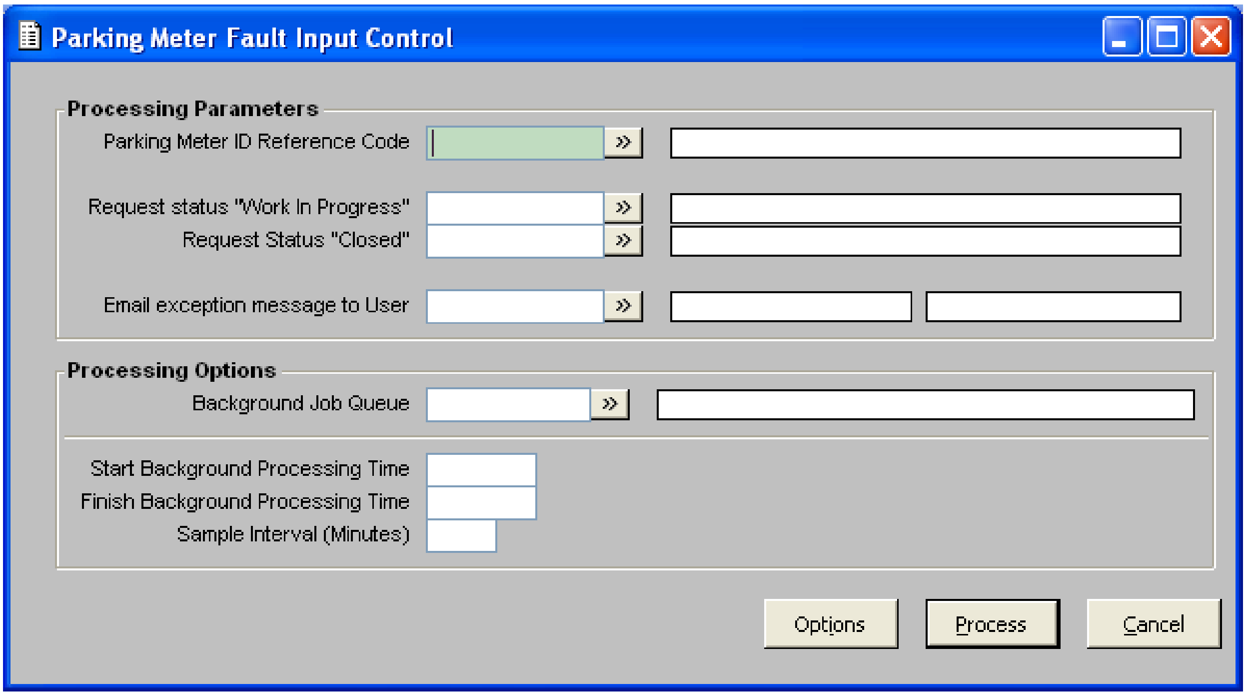
**Processing Options –Sample Interval (Minutes)**

Enter a time span for the process to schedule the next job. If the interface is to look for new records every 5 minutes then 5 should be entered. Once a job is processed on the nominated Background Queue another job will be scheduled to be processed after this time.

# Reino Parking Meter Maintenance Input Interface

The Customer Service Module provides an Interface to the Reino Parking Meter Maintenance system. Customer Service Requests are logged for faulty or damaged Parking Meters and a file can be periodically uploaded by the Reino Parking Meter Maintenance system.

Note: A modification has been made (in Release 2.21) to the Parking Meter Fault input to allow the entry of a Note Type Code to use on the new notes created when a Request is updated. Note that this Note Type needs to be defined on the Request Type or the Request Type's parent, and if not found, the process will look for a 'GEN' Note Type on the Request Type, and if that is not found the Note Type on an existing Note on the Request is used. If no Note Type can be established, an exception will be generated. An additional change has been made to exception processing. If an exception is produced, then the CMACTIVE flag on the CIFRINP record will be set to 2. The CMACTIVE flag is set to 1 for all successful records. Modifications have also been made to ensure Exception emails are sent to the User selected on the Control form.



*Parking Meter Fault Input Control*

**Processing Parameters – Parking Meter ID Reference Code**

Select the Parking Meter ID Reference Code to be used. This must first be set up in the parameters so that it can be selected. The Parking Meter ID Reference Code must to be set to “EQUIPMENT”.

**Processing Parameters – Request Status “Work in Progress”**

Select the Request Status “Work in Progress” to be used. This must first be set up in the parameters so that it can be selected. The Request status for “Work in progress” must be set to “WIP”.

**Processing Parameters – Request Status “Closed”**

Select the Request Status “Closed” to be used. This must first be set up in the parameters so that it can be selected. The Request status for “Closed” must be set to “CLOSED”.

**Processing Parameters – Email exception message to User**

Select the user to be notified by e-mail of any exception messages. The selected user must have an e-mail address nominated.

**Processing Options – Background Job Queue**

Select the Background Job Queue to be used by this process. A background job queue should be created to be used solely by this process.

**Processing Options – Start Background Processing Time**

Set the Start Background Processing Time for the time to start the processing. A job will be scheduled on the nominated Background Job Queue to commence at this time.

**Processing Options – Finish Background Processing Time**

Set the Finish Background Processing Time for the time to stop the processing. Jobs will stop being scheduled on the nominated Background Job Queue after this time. The Background Job Queues will however not be stopped at this time.

**Processing Options –Sample Interval (Minutes)**

Enter a time span for the process to schedule the next job. If the interface is to look for new records every 5 minutes then 5 should be entered. Once a job is processed on the nominated Background Queue another job will be scheduled to be processed after this time.

# Appendix A

# Asset Management Integration

## Hansen Asset Management Interface and Pathway Customer Service.

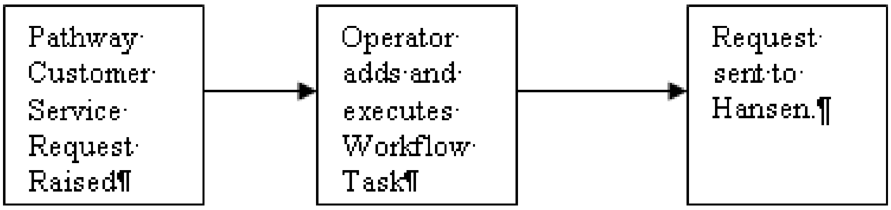
### Overview of Functionality

This section details the interface between Pathway Customer Service and Hansen Asset Management software.

The functionality provides Customer Service staff and Works Department staff with the ability to enter Requests and complete them as required.

Customer Service Staff are able to enter the details into Pathway Customer Service. When the operator determines that the request needs to be sent to the Works Department for action, a Pathway Customer Service Workflow Task is added to the Request. When the task is executed it initiates the process that will ultimately create a Hansen Work Order. The creation of the Hansen Request can only be initiated by the user creating and executing the specific Task against the Customer Service Request.

The Task is defined by Customer Service staff and uses a System action defined by Infor. This action initiates the process that results in a Hansen request being created.




### Asset Management Product Maintenance

A new entry has been defined in Asset Management Product Maintenance.

### Customer Service System Parameters

Customer Service System Parameters should be set by the user to indicate that the Asset Product Code is ‘HANSEN’ and a Reference Type will need to be selected.

The Reference Type is used to record the Hansen record number against the Customer Service Request. This allows a search to be conducted using the Hansen Job number.

### Customer Service Workflow Parameters

A User Action needs to be created by users based on the System Action of ‘Assets’. This action needs to be associated to a Task Type so that a Request can be created in Hansen.

### Customer Service Maintenance

To create a Hansen Job Request the following workflow needs to be implemented.

1. A request is received by council and recorded in Customer Service.
2. An assessment is made and it is determined that a Request is required in Hansen

3. The Task Type that has been defined to create a Hansen Request is created as a Task against the Customer Service Request and executed.
4. The Task is executed and calls Hansen to create the Request

   Pathway constructs the related parameters into an XML string under the XML document definition agreed with Hansen. Pathway calls the Hansen COM Interface to pass the XML string to create a Hansen Job Request. Once the Hansen Job Request is created, Hansen constructs related parameters into an XML string under the XML document definition defined by INFOR. Hansen then calls the Pathway COM Interface to pass the XML string to create References against the Pathway Customer Service Request.

Once the Hansen Job Request's status is changed or Notes are added against the Customer Service Request, Hansen passes the related XML string to Pathway via the COM Interface to update the Request status or add notes against the request.

Following is the sample XML string that is sent to Hansen


```
"<?xml version="1.0"?>
<XML>
 <HANSEN_COMMAND>
  <Name>RAISE SERVICE REQUEST</Name>
  <CSR_NO>53832</CSR_NO>
  <REQUEST_TYPE>Hansen</REQUEST_TYPE>
  <REQUEST_TYPE_DESC>DRN8501 Hansen's Interface</REQUEST_TYPE_DESC>
  <RESPONSIBLE_OFFICER>PSMITH</RESPONSIBLE_OFFICER>
  <REQU_RESPOFFICER>026</REQU_RESPOFFICER>
  <REQU_ACTNOFFICER>PSMITH</REQU_ACTNOFFICER>
  <LOG_DATE>19-Nov-2002 14:08:42</LOG_DATE>
  <ACTION_BY_DATE>21-Nov-2002 14:08:42</ACTION_BY_DATE>
  <CONTACT_FIRST_NAME>JOHN</CONTACT_FIRST_NAME>
  <CONTACT_SURNAME>BROWN</CONTACT_SURNAME>
  <CONTACT_HOUSE_NO>54</CONTACT_HOUSE_NO>
  <CONTACT_STREET_NAME>WELLINGTON</CONTACT_STREET_NAME>
  <CONTACT_STREET_TYPE>Street</CONTACT_STREET_TYPE>
  <CONTACT_SUBURB>ADELAIDE</CONTACT_SUBURB>
  <CONTACT_POSTCODE>5000</CONTACT_POSTCODE>
  <CONTACT_PHONE></CONTACT_PHONE>
  <PROBLEM_PROPERTY_DETAILS>John's House - Section 22A-24A, Suite 33A-34B, John's House, 5A-13A Acacia Boulevard, EASTWOOD SA 5063</PROBLEM_PROPERTY_DETAILS>
  <PROBLEM_HOUSE_NUMBER>5A-13A</PROBLEM_HOUSE_NUMBER>
  <PROBLEM_UNIT_NUMBER>22A-24A</PROBLEM_UNIT_NUMBER>
  <PROBLEM_STREET_NAME>Acacia</PROBLEM_STREET_NAME>
  <PROBLEM_STREET_TYPE>Boulevard</PROBLEM_STREET_TYPE>
  <PROBLEM_SUBURB>EASTWOOD</PROBLEM_SUBURB>
  <PROBLEM_POSTCODE>5063</PROBLEM_POSTCODE>
  <STREET_NAME>52nd</STREET_NAME>
  <STREET_TYPE>Street</STREET_TYPE>
  <STREET_SUBURB>EASTWOOD</STREET_SUBURB>
  <STREET_POSTCODE></STREET_POSTCODE>
  <PROBLEM_RATING>2</PROBLEM_RATING>
  <NOTE_DETAILS></NOTE_DETAILS>
 </HANSEN_COMMAND>
</XML>
"
```


When a request is made for a new record in Hansen the following details are made available to Hansen to record against the job request. Items are sourced from the Customer Service Request and it is essential that similar fields exist in Hansen in order that the information can be sent from Pathway to Hansen.

- Customer Service Request Number
- Request Type details
- Responsible Officer details

- Actioning Officer details
- Name details
- Property Location details
- Street/Suburb details
- Date Submitted
- Date to Respond by
- Priority
- Note details from the Customer Service Request

**Rules applying to the Pathway – Hansen Interface**

The following rules apply in the Customer Service – Hansen interface:

- ***If the task that initiates the Job Request is deleted then no action is taken in Pathway Customer Service or Hansen.***

- If a Job Request is not created in the first instance when Hansen is called then the action against the Task will still be completed. If the user wishes to initiate another call to Hansen to raise a Job Request then a new Task needs to be added against the Customer Service Request.

- A Pathway Customer Service Request could have many Hansen Job Requests linked, but a Job Request will only ever be linked to one Pathway Customer Service Request.

- If the Hansen Job Request is deleted then no action will be taken in Pathway Customer Service. (i.e. any References created will remain. )

- If the Pathway Customer Service Request is deleted then no action is taken in Hansen.

- Hansen needs to return the Job Request number to Pathway Customer Service to enable the Reference details to be created. This allows users to access the Hansen Job Request from Customer Service.

- Responsible Officers and Actioning Officers (User IDs) in Hansen should match those in Pathway.

- The Asset Exception Report will list any errors encountered by Pathway in processing Job Requests from Hansen e.g. Incorrect Responsible Officer, Status etc. Any reported errors will need to be manually corrected within Customer Service.

- The Customer Service Request Type Code which will generate Hansen Job Requests will be defined up to 5 characters so as to match Hansen's requirement.

**Installation Requirements**

There are a number of installation requirements and procedures that need to be followed to ensure that the interface works seamlessly.

The Pathway requirements include the set up of a Background Processing Queue that is used to service the Hansen updates that are made, and the set up of the Pathway Customer Service Parameters. Pathway release 2.13 (SP2) is a minimum requirement in order to implement this interface.

Customers should note that specific Hansen installation requirements may exist and that specific details should be sought from Hansen.

**Pathway Setup Parameters**

1. Go to References >> Reference Type Maintenance
2. Click 'New' button on the Reference Type Search Profile form
3. Copy the data from figure 1
4. Click OK and return to System Menu.

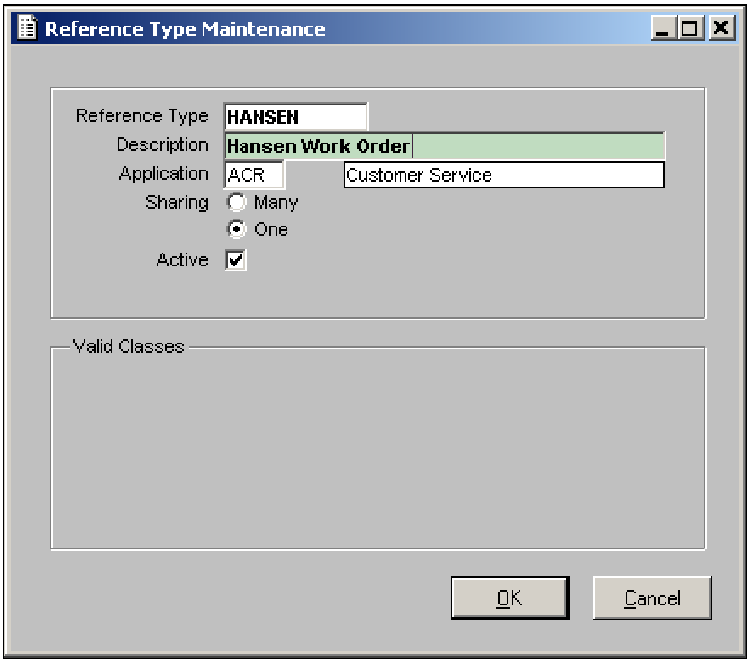



*Figure 1: Reference Type set up*

5. Go to Customer Service >> Parameters >> System Parameters
6. Select "Hansen" as Hansen Product Code and "Hansen" as the Asset Reference Type (Figure 2)
7. Click OK

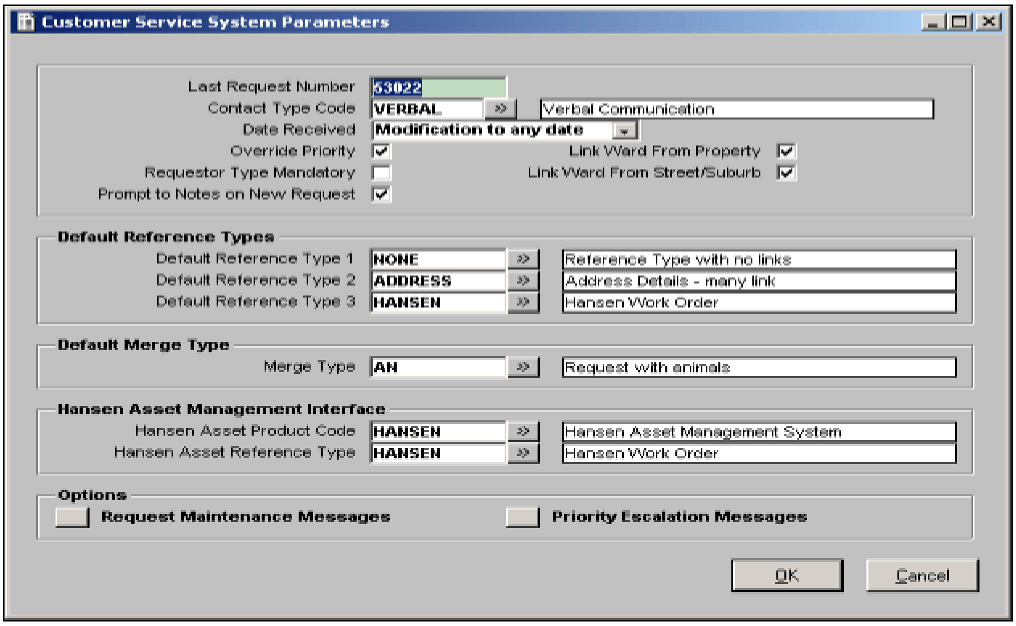



*Figure 2: Set up Customer Service system parameters for Hansen Asset System*

8. Go to Customer Service >> Parameters >> User Defined Label Maintenance
9. You can define your Asset Management System Label here. This user defined label will appear wherever the Assets label is used in the system. Figure 3 is an example.
10. Click OK

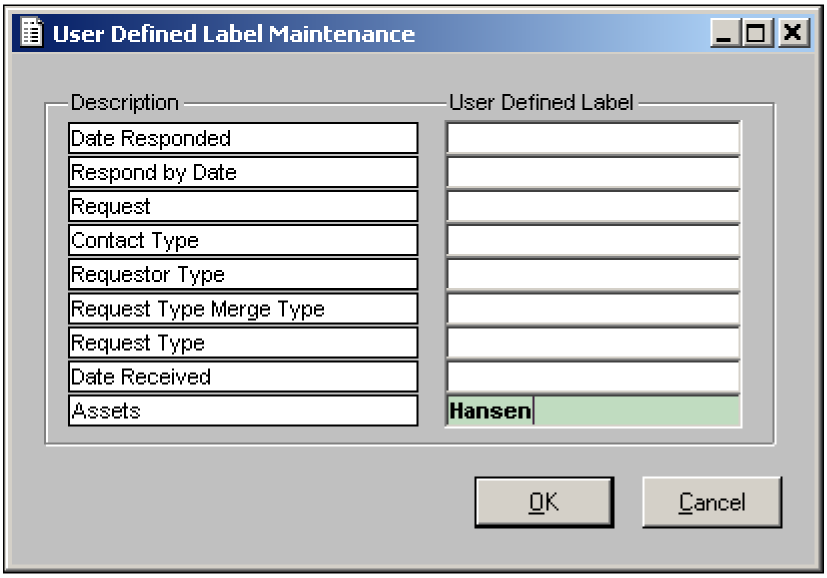



*Figure 3: Set up user defined label for Hansen*

11. Go to Customer Service >> Parameters >> Work Flow Parameters >> User Action Maintenance
12. Click the New button on the User Action Search Profile.
13. Copy the data from Figure 4.
14. Click OK

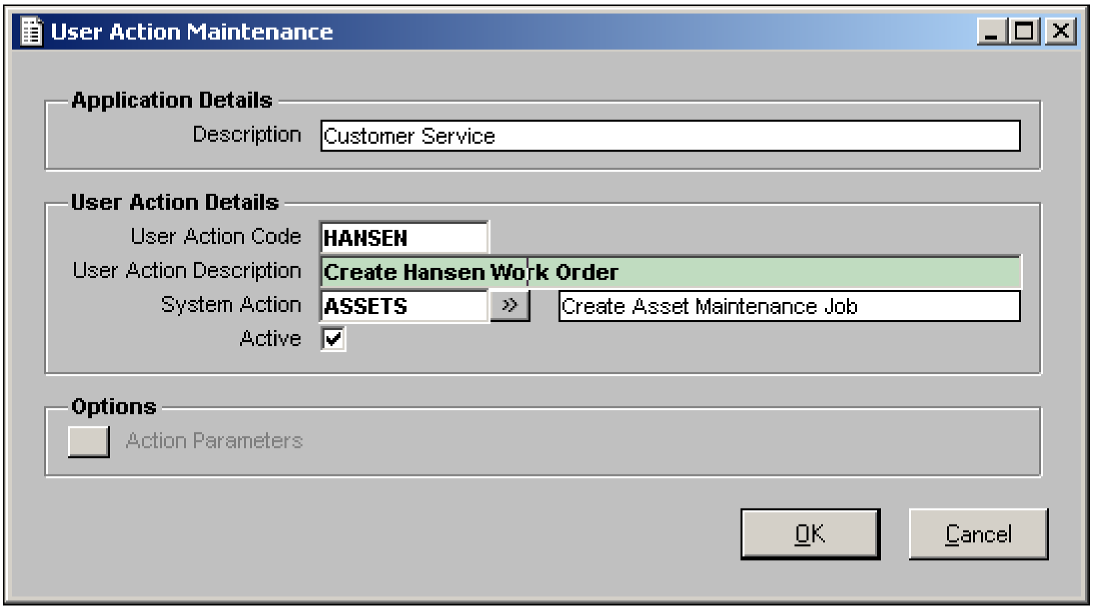



*Figure 4: Define a new user action with the System Action "ASSETS"*

15. Go to Customer Service >> Parameters >> Work Flow Parameters >> Task Type Maintenance
16. Click the New button to create a new Task Type which will create the Hansen Work Order.
17. Detail out on the "Task Type Actions" Option button . Assign the User Action you just created in figure 4 to this new Task Type. Figure 5 is an example
18. Click OK

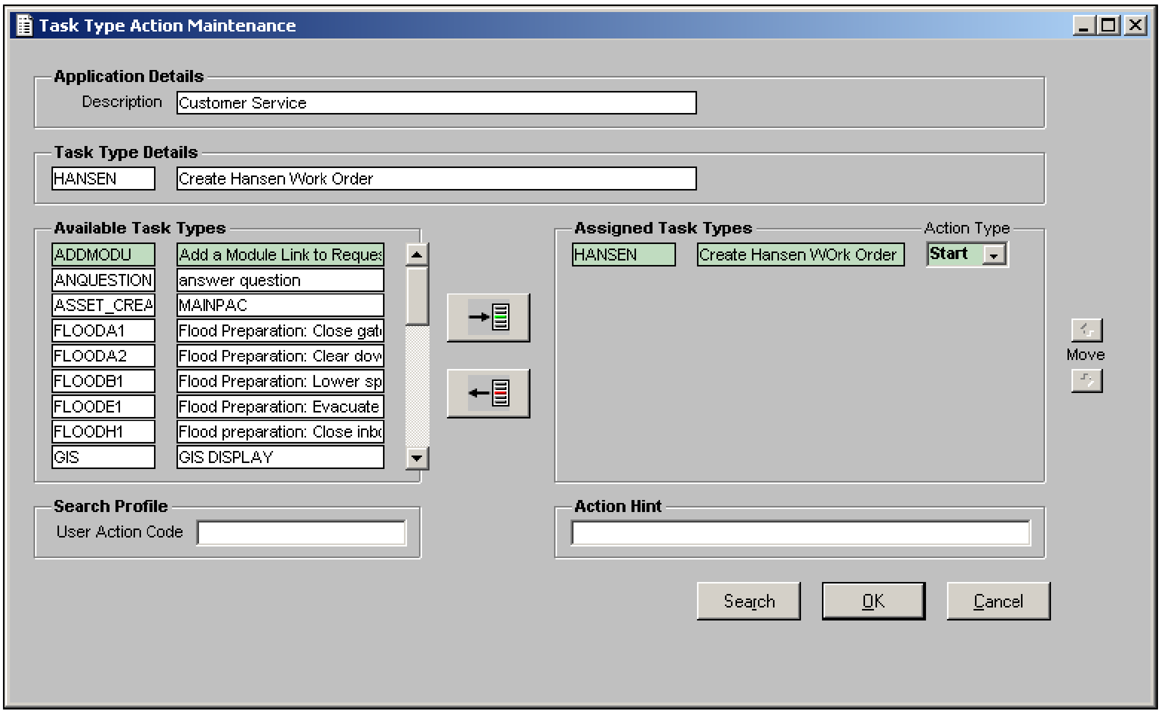


*Figure 5: Assign User Action to task Type*

**Step 20 ~ 22 must be performed if you want to create a new Background Processing Job Queue to process requests from Hansen. If you want to use an existing Background Processing Job Queue, please ignore step 26 to 29.**

19. Go to Batch Processing >> Maintain Job Queue at Administrator Level
20. Click the Insert button on Job Queue Maintenance form.
21. Insert a new Background Processing Queue, (Figure 6 is an example). This new Job Queue will be the default job queue for the Customer Service module.
22. Click OK

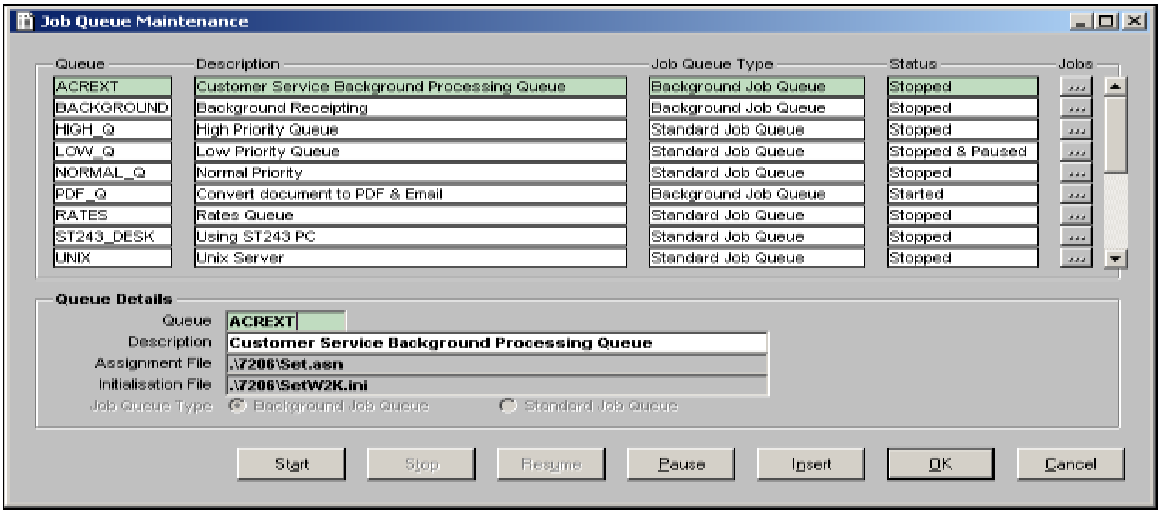


*Figure 6: Set up new Background Processing Job Queue*

23. Go to System Administration >> System Parameters >> Application Code Maintenance.
24. Select the Background Processing Job Queue which you intend to process requests from Hansen. Figure 7 is an example.
25. Click OK

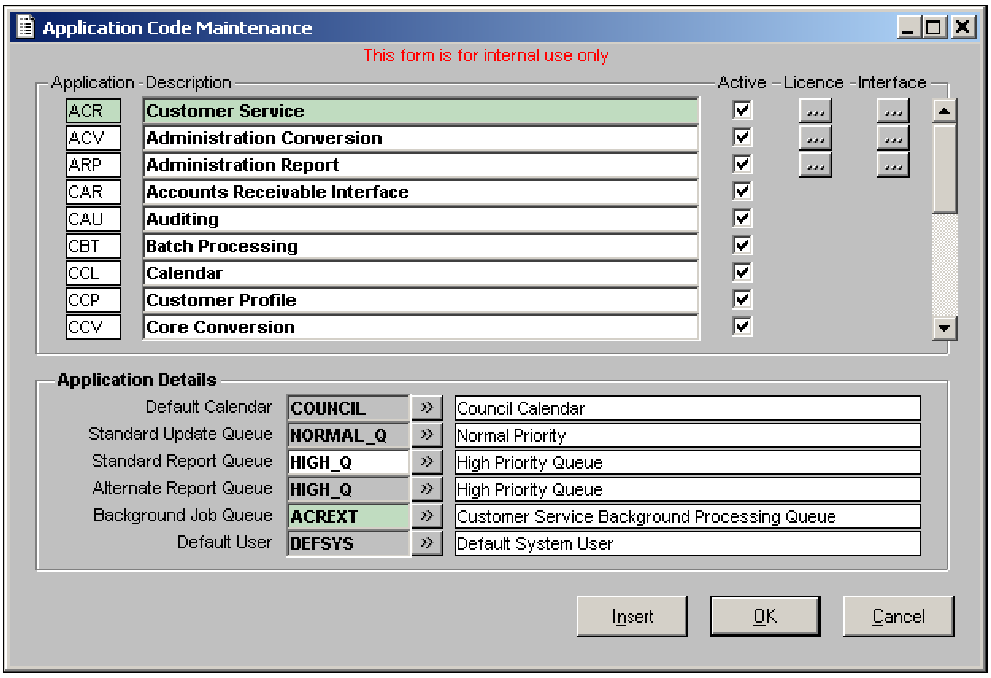



*Figure 7: Set up default Background Processing Job Queue for "ACR"*

**IMPORTANT INFORMATION**

Please make sure related Hansen Users have been added as Pathway users. If the USERID passed by Hansen does not match any Pathway user, the related function will not be performed and an exception will be produced.

---

## HANSEN AND CONFIRM INTERFACE

The interface functions for these systems have been modified to validate a Status Code passed in using the rules defined for this DRN.

i.e. If the Authorised Function IS NOT authorised

All Status Codes are valid - as per existing functionality

If the Authorised Function IS authorised

If one or more Status Codes has been assigned to the selected Request Type, then only those Status Codes that have been assigned to the Request Type will be valid.
(If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes will be valid)

# Asset Master Integration

## Overview

Pathway to AssetMaster integration is available from Thick Client Release 3.01. The Integration allows for the created of an Asset Master Work Order Request from with Pathway Customer Service Request. This integration is a secured function and is access with a valid code to Authorised Function '*AssetMaster Work Orders & Asset Management*'

Control of the updates to the Pathway Customer Service Request is then passed to AssetMaster. Changes of Status codes within Asset Master will be reflected in Pathway via a change to the Pathway Status Code and a Note being added to the request. These updates are processed through a background queue.

Present functionality allows for a one to one relationship between the two systems.

Upon entering a Pathway customer Service request, the Work Order Glyph will be displayed. A Yellow Glyph indicating that there is currently no link to a Work Order or Asset. A Red Gyph indicating a link to either a Work Order Request or an Asset. Where there is a link to both, and the Glyph is activated, the user will be prompted as to whether they wish to be taken to the Work Order Request or the Linke Asset.

Property Maintenance will also display the Work Order Glyph. This will indicate a link to a Council owned Asset in AssetMAster. Activiating the Glyph will take the user to the Asset in Assetmaster.

## Parameters and Required Setup

### System Requirements

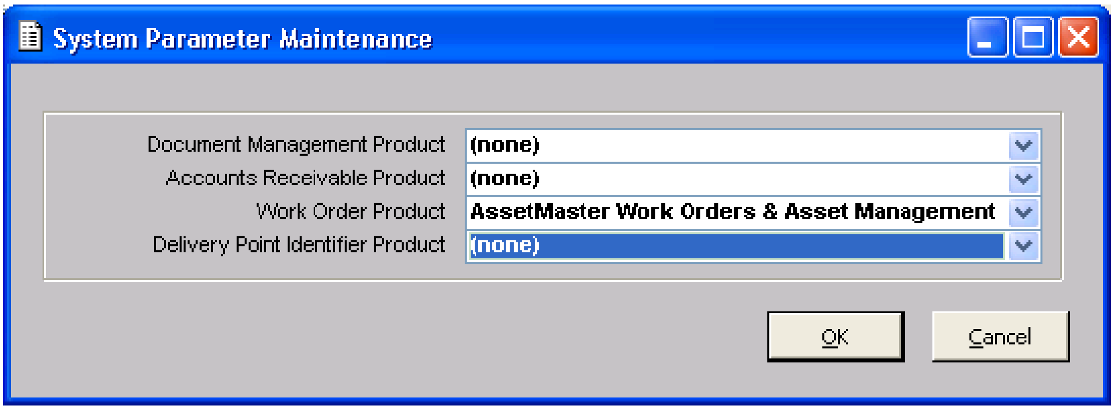
***AppLauncher***
The AssetMaster integration has been developed using AppLauncher as the interim product to allow communication to occur between AssetMaster and Pathway.

***Pathway Install/AssetMaster Install***
For Interactive functionality between Pathway Thick Client and AssetMaster it is a requirement to have both Pathway and Assetmaster available to the Client machine desktop.

**Authority Code**
Ensure that council has the required Authorised Code for Authorised Function - AssetMaster Work Orders & Asset Management

### Integration System Parameter Maintenance

System Administrator Menu - Production >> System Administration >> Integration >> System Parameter Maintenance

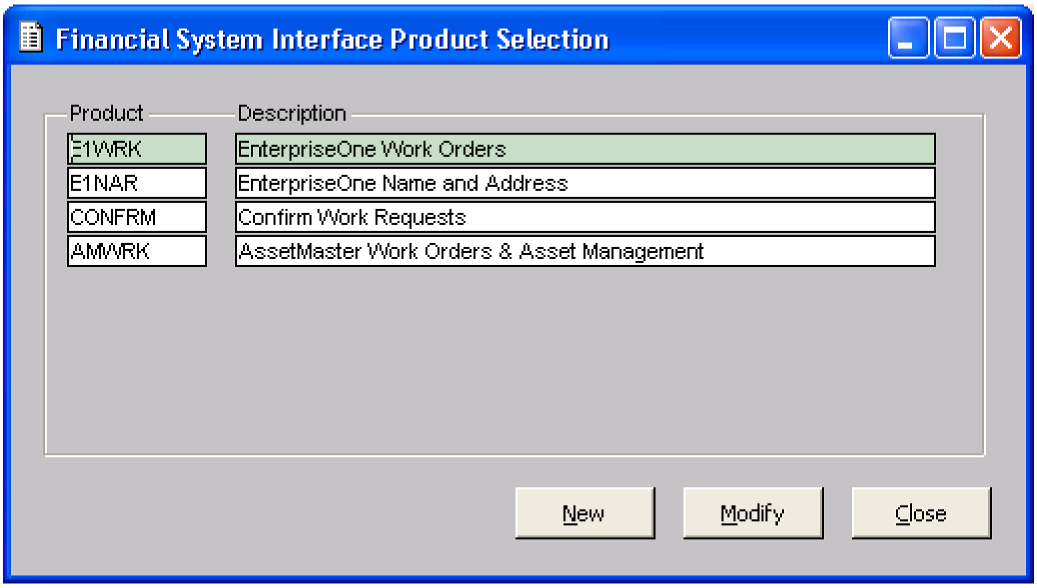



*System Parameter Maintenance Form*

Access the System Parameter Maintenance form within the Integration Parameters and select AssetMaster Work Orders & Asset Management as the Work Order product.

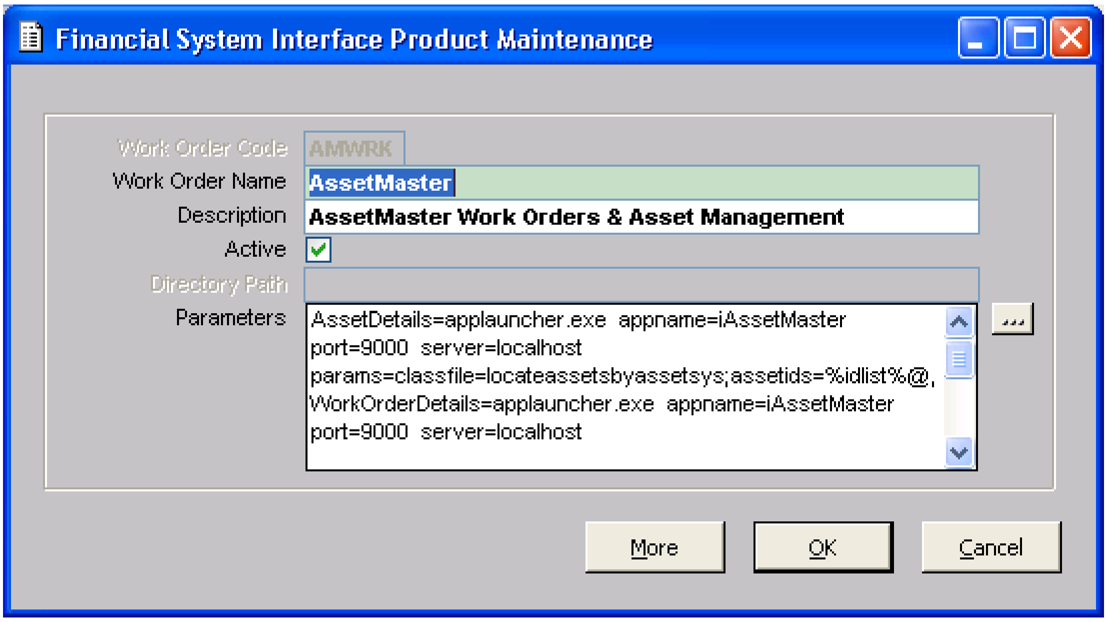
## Financial Systems Interface Product Parameters

System Administrator Menu - Production >> System Administration >> Integration >> Financial System Parameters >> Financial System Interface Product Parameters




*Financial System Interface Product Selection Form*

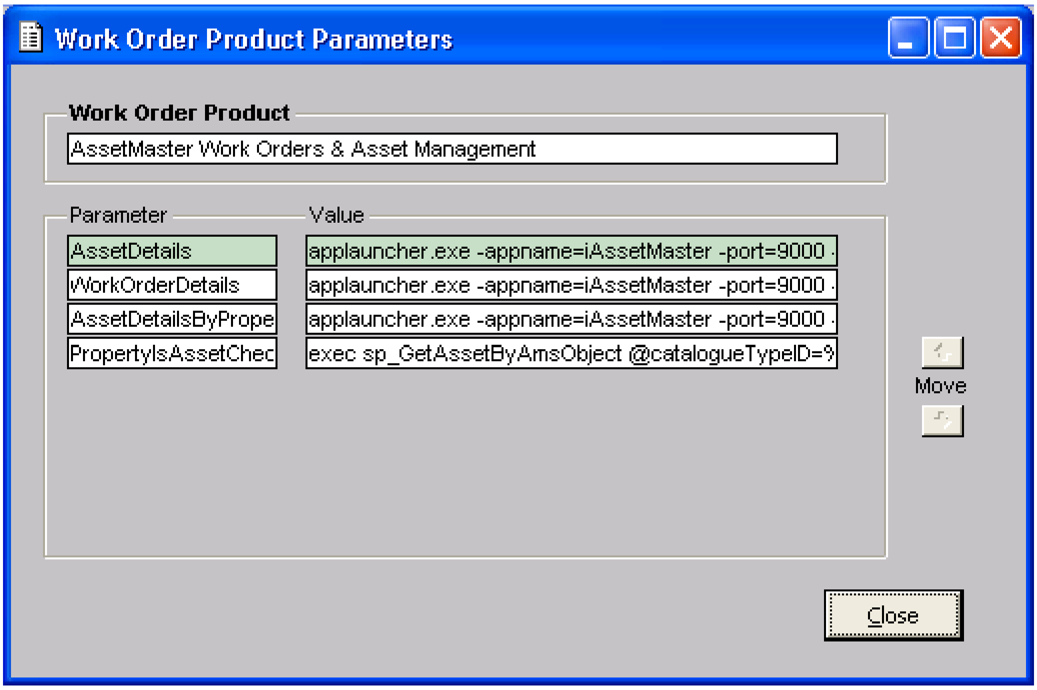
Select AMWRK and click on Modify to set up the required parameters.



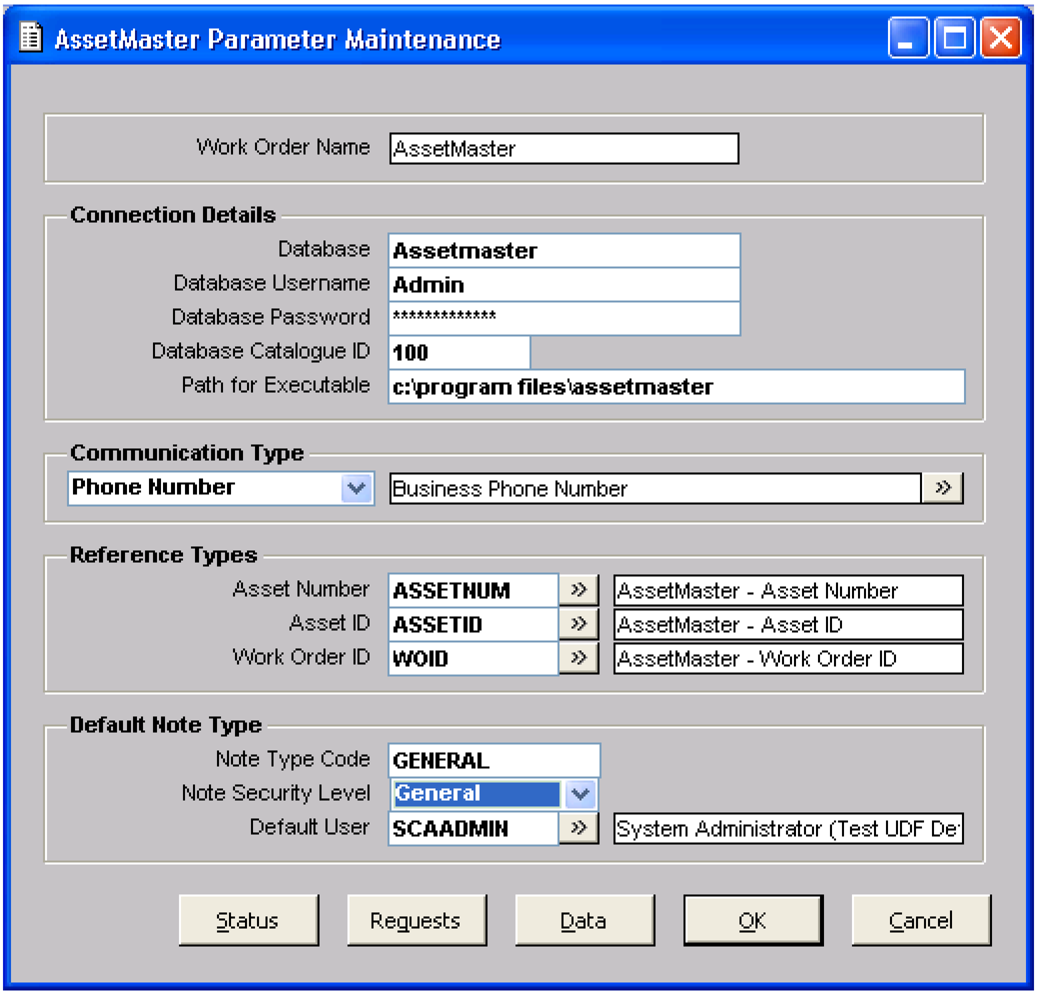

*Financial System Interface Product Maintenance Form*

Click on the More button to access the AssetMaster Parameter Maintenance Form.

The details displayed in the Parameters box are the requirements for Pathway to launch AppLauncher. Taking the Detail button on this field will take you to another view of the enquiry only parameters. These parameters are controlled by Infor.




## AssetMaster Parameter Maintenance




*AssetMaster Parameter Maintenance Form*

**Connection Details**

| | |
|---|---|
| DataBase | The Asset Master DataBase Name |
| Database Username | The Asset Master UserName to be used to log on. |
| Database Password | The passwords for the User Name – encrypted. |
| Database Catalogue ID | Catalogue ID will be 100. |
| Path for Executable | The Path to the AssetMaster executable. |

**Communication Type**

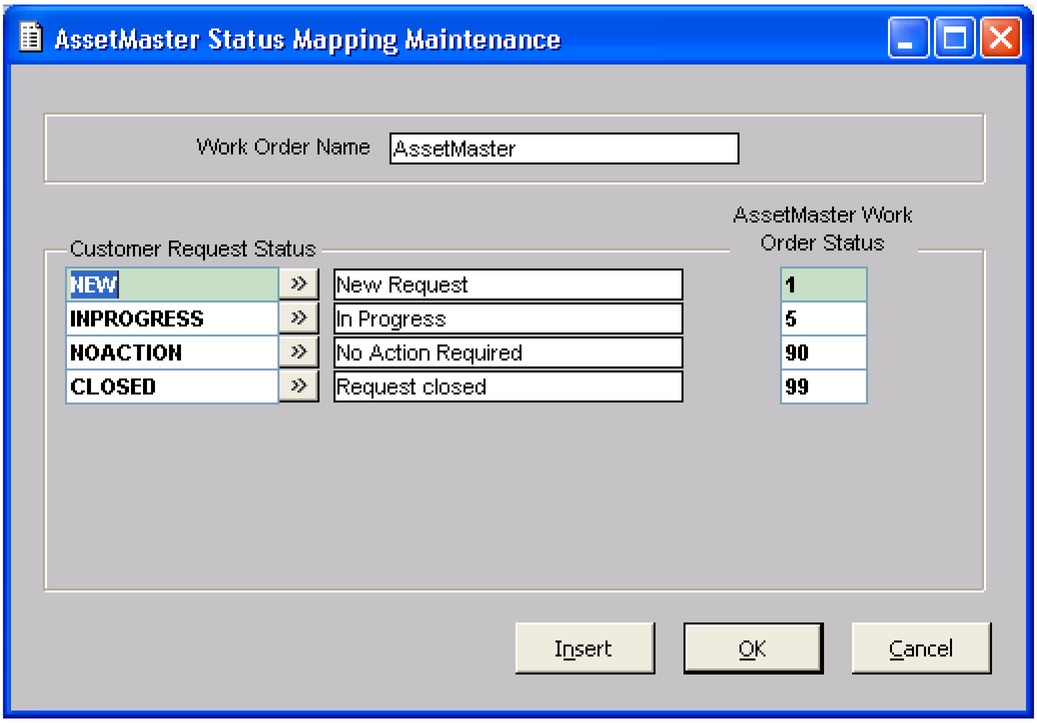
**Reference Types**

| | |
|---|---|
| Asset Number | Select the Customer Service Reference Type for Asset Number |
| Asset ID | Select the Customer Service Reference Type for Asset ID |
| Work Order ID | Select the Customer Service Reference Type for work Order ID |

**Default Note Type**

| | |
|---|---|
| Note Type Code | Enter the Note Type Code (no validation) |
| Note security Level | Enter the Note Type Security Level required – General, Restricted, Confidential |
| Default User | Select the UserID that will be attached to the notes created by the AssetMaster update process. |

## AssetMaster Parameter Maintenance – Status

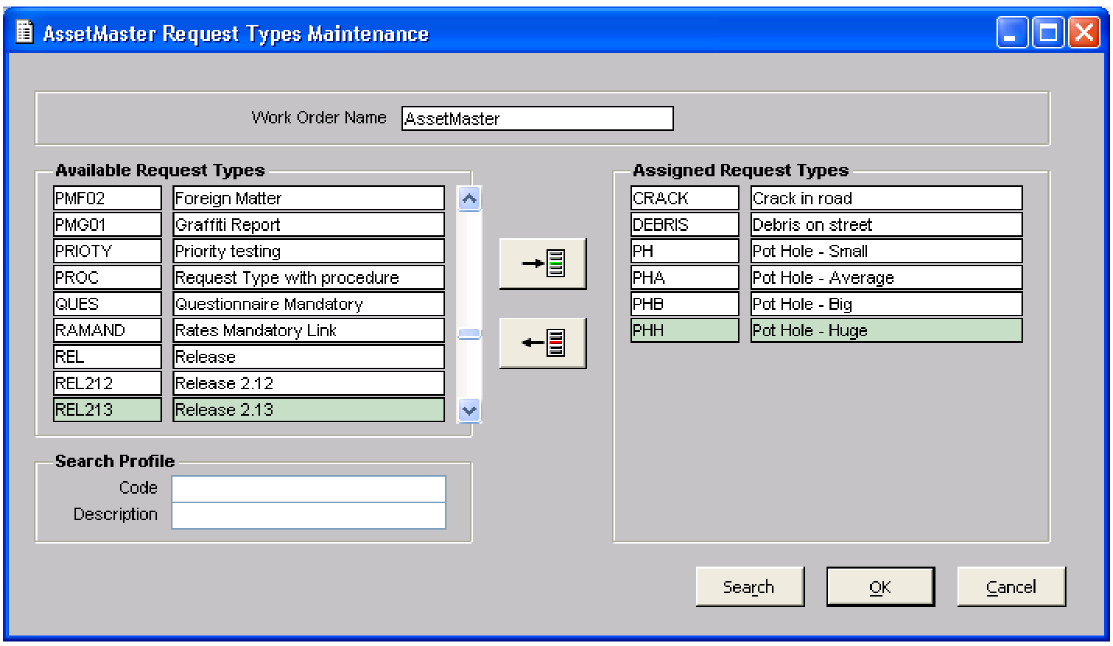



*AssetMaster Status Mapping Maintenance Form*

The Status Parametesr allow for the mapping of the Pathway Customer Service Reqeust Status Code to the AssetMaster Work Order Status Codes.

Use the Insert button to add as many records as required.  The above represents that setup currently in use at Melbourne City Council.

## AssetMaster Parameter Maintenance – Requests

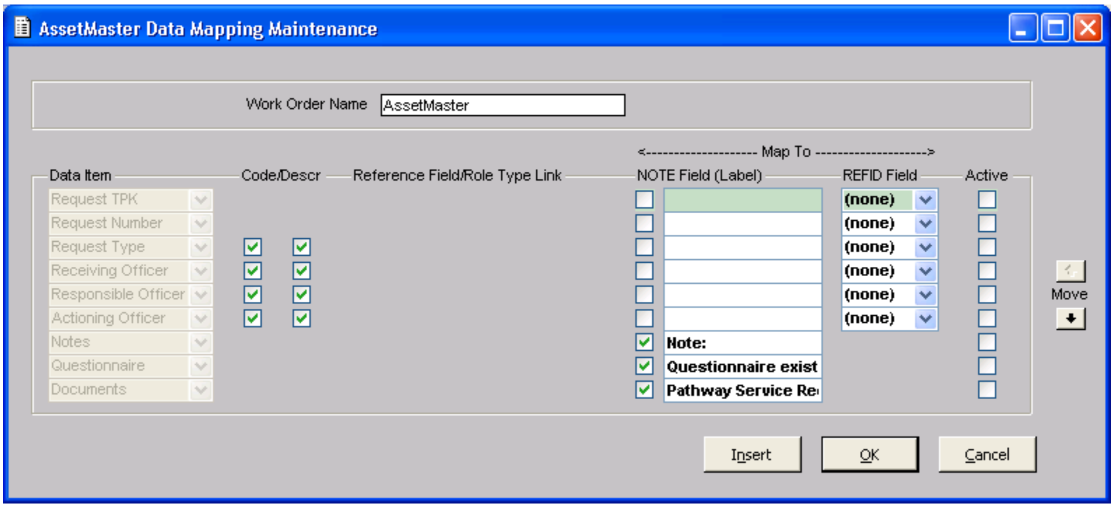



*AssetMaster Request Type Maintenance Form*

The AssetMaster Request Type Maintenance form allows for the nomination of those request types that are required to create a Work Order Request.

Use the move buttons to allocate those requests for which AssetMaster Work Order requests could be required.

## AssetMaster Parameter Maintenance – Data




*AssetMaster Data Mapping Maintenance Form*

The Asset DataMapping Maintenance parameters allow for information in Pathway to be mapped to a destination field in AssetMaster.

Additionally the information contained in the Note added into pathway is controlled here.

**Data Item**
**Code/Decr**
**Reference Field/Role Type Link**
**Map to Note**
**Map to REFID field**

Activate the data items to be mapped, and select a destination.

If being mapped to the NOTE field, check on the NOTE field checkbox and enter the text to be used to prefix the data;

If being mapped to a REFID field, select the REFID field from the dropdown list.
Not all Pathway fixed fields are available on this form, only those that were specified as being mapped to a field in CIFAMWO are included. These are:

Request TPK (TPKACRREQU.ACRREQU) : will always be mapped to EXTID2.
may also optionally be mapped to NOTE and/or any REFID field

Request Number (REQUNUM.ACRREQU) : will always be mapped to EXTID1.
may also optionally be mapped to NOTE and/or any REFID field

Request Type (REQTCODE.ACRREQT / DESCR.ACRREQT) may optionally be mapped to NOTE and/or any REFID field

Receiving Officer (USERID.CSYUSER / USERNAME.CSYUSER) USERID will always be mapped to REPORTED_BY, USERID and/or USERNAME may also optionally be mapped to NOTE and/or any REFID field

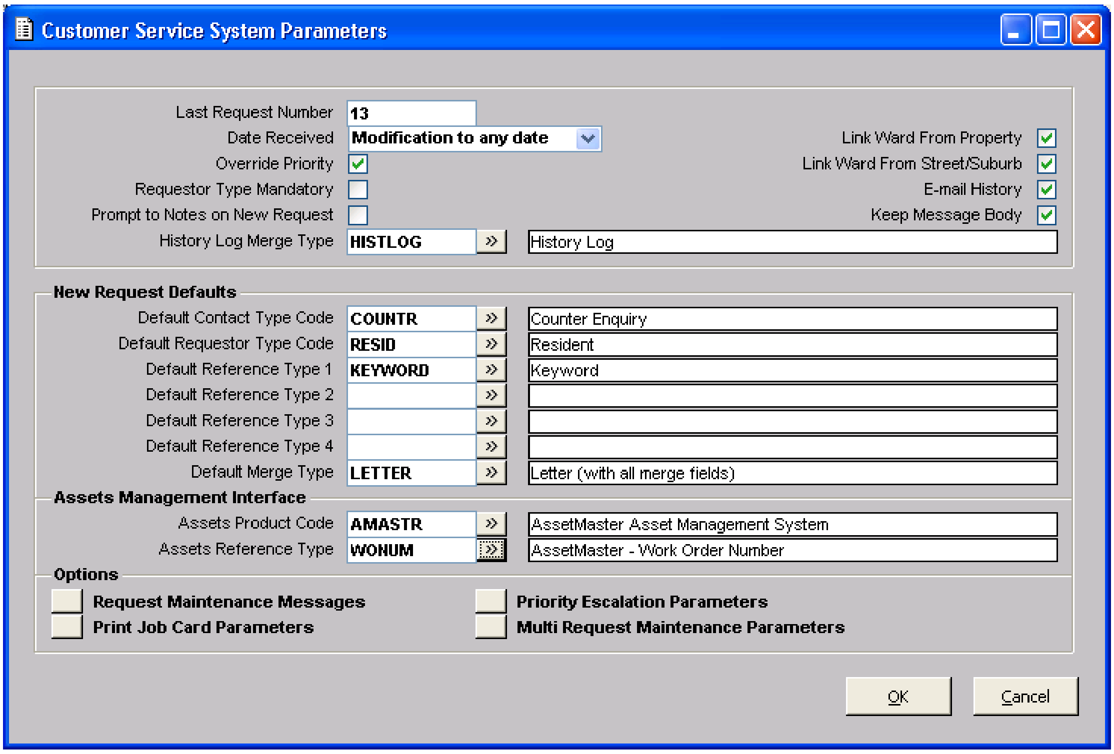
Responsible Officer (USERID.CSYUSER / USERNAME.CSYUSER) : USERID will always be mapped to SUPERVISORID; USERID and/or USERNAME may also optionally be mapped to NOTE and/or any REFID field

Actioning Officer (USERID.CSYUSER / USERNAME.CSYUSER) : USERID will always be mapped to OWNINGOFFICERNAME; USERID and/or USERNAME may also optionally be mapped to NOTE and/or any REFID field

Questionnaire : if the mapping is Active, the Questionnaire data will be mapped to SPECIAL_INSTR with the label text being mapped to the NOTE field Documents
if the mapping is Active, the label text will be mapped to the NOTE field

## Customer Service Parameters

System Administrator Menu - Production >> Customer Service >> Parameters >> System Parameters



*Customer Service System Parameters Form*

**Assets Product Code**
The Assets Product Code should be set to AMASTR for AssetMaster Asset Management System. Enter the AMASTR code or select from the popup selection field.

**Assets Reference Type**
One Reference Type is held in the Customer Service System Parameters for use in AssetMaster. This Reference type is user defined and is set up in the following Menu Option. System Administrator Menu - Production >> Customer Service >> Parameters >> Reference Type Maintenance

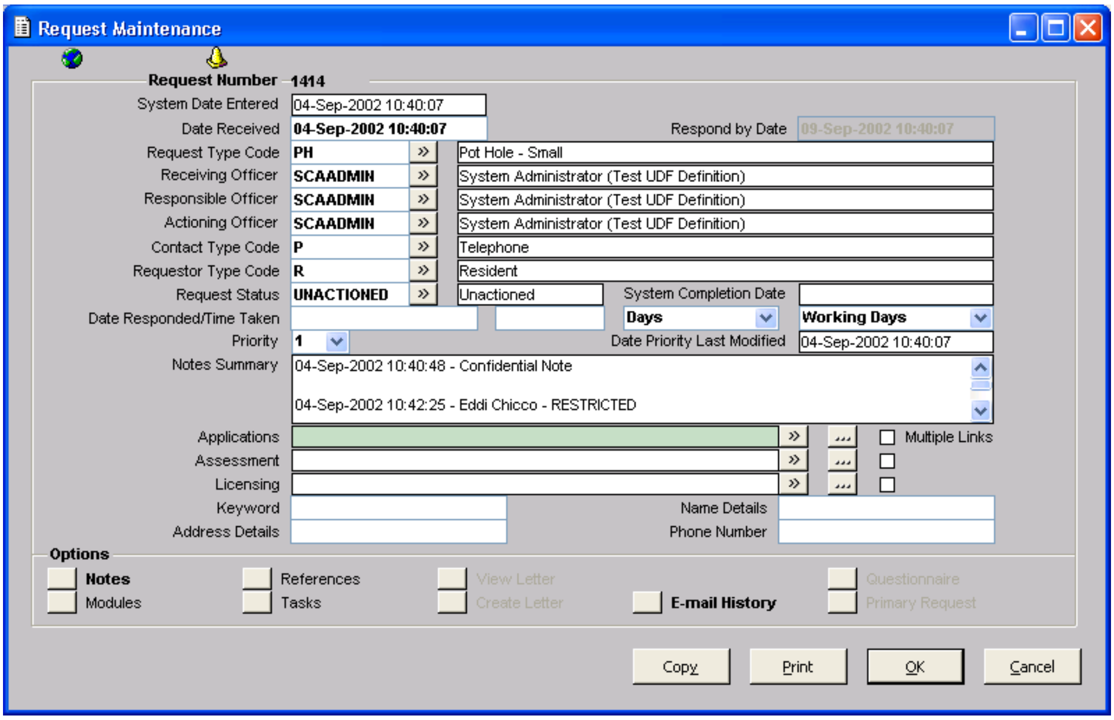
Enter the code if known or select from the list of available reference types using the pop Selection field.

Other reference fields for this interface are recorded in the Financial Interface Product Parameters.

## Access from Pathway to AssetMaster

## Customer Service Request Maintenance

System Administrator Menu - Production >> Customer Service >> Request Entry




*Request Maintenance Form*

 Yellow Glyph – the Appearance of the Yellow Work Order Glyph identifies that this request currently has no links to an AssetMaster work order or an AssetMaster Asset record.

Red Glyph
Associated Menu

## Creation of Interface Table

Due to the complexity of the AssetMaster interface table, we are unable to create

### AMS_WKO_EXT – AssetMaster Work Order

This table holds work order requests generated by the creation of a new Customer Request in Pathway. The requests will be polled for and processed by AssetMaster.

Note that this table is defined by AssetMaster. Because the combined size of all the columns breaks a Uniface limit (and in any case, Uniface would attempt to generate an overflow table), the table will not be created in Uniface, but will be created using the following script, and will be written to via an INSERT INTO SQL statement used in conjunction with the `sql` proc statement:-

Activate the data items to be mapped, and select a

**MS SQL Server version:**

```
CREATE TABLE [AMS_WKO_EXT](

[WKOID] [int] NULL,
[EXTID1] [varchar](50) NULL,
[EXTID2] [varchar](50) NULL,
[WKOID_USER] [varchar](20) NULL,
[PROGID] [int] NULL,
[ACTID] [int] NULL,
[BUDGETID] [int] NOT NULL,
[CREATED_BY] [varchar](50) NULL,
[GENERATEOFFICERID] [varchar](50) NULL,
[OWNINGOFFICERNAME] [varchar](50) NULL,
[OWNINGDIVISIONID] [varchar](50) NULL,
[CREATIONDATE] [datetime] NOT NULL,
[OBJECTID] [int] NULL,
[WORK_COMPLETE] [int] NULL,
[NOTE] [varchar](2000) NULL,
[PRIORITY] [int] NULL,
[STATUS] [int] NULL,
[STATUS_DATE] [datetime] NULL,
[MAINTTYPEID] [int] NULL,
[WARRANTY_DATE] [datetime] NULL,
[REPORTED_BY] [varchar](50) NULL,
[REPORTED_DATE] [datetime] NULL,
[SUPERVISORID] [varchar](50) NULL,
[PARENTWKOID] [int] NULL,
[EXP_START_DATE] [datetime] NULL,
[EXP_FINISH_DATE] [datetime] NULL,
[SCHED_START_DATE] [datetime] NULL,
[SCHED_FINISH_DATE] [datetime] NULL,
[ACT_START_DATE] [datetime] NULL,
[ACT_FINISH_DATE] [datetime] NULL,
[LAST_MODIFIED_BY] [varchar](50) NULL,
[LAST_MODIFIED_DATE] [datetime] NULL,
[CONTACTID] [int] NULL,
[CONTRACTID] [int] NULL,
[REFID1] [varchar](255) NULL,
[REFID2] [varchar](255) NULL,
[REFID3] [varchar](255) NULL,
[REFID4] [varchar](255) NULL,
[GLCODE1] [varchar](50) NULL,
[GLCODE2] [varchar](50) NULL,
[GLCODE3] [varchar](50) NULL,
[GLCODE4] [varchar](50) NULL,
[REFID5] [varchar](255) NULL,
[REFID6] [varchar](255) NULL,
[REFID7] [varchar](255) NULL,
[REFID8] [varchar](255) NULL,
[REFID9] [varchar](255) NULL,
[REFID10] [varchar](255) NULL,
[REFID11] [varchar](255) NULL,
[REFID12] [varchar](255) NULL,
[REFID13] [varchar](255) NULL,
[REFID14] [varchar](255) NULL,
[REFID15] [varchar](255) NULL,
[REFID16] [varchar](255) NULL,
[REFID17] [varchar](255) NULL,
[REFID18] [varchar](255) NULL,
[REFID19] [varchar](255) NULL,
[REFID20] [varchar](255) NULL,
[REFID21] [varchar](255) NULL,
[REFID22] [varchar](255) NULL,
[REFID23] [varchar](255) NULL,
[REFID24] [varchar](255) NULL,
[REFID25] [varchar](255) NULL,
[REFID26] [varchar](255) NULL,
[REFID27] [varchar](255) NULL,
[REFID28] [varchar](255) NULL,
[REFID29] [varchar](255) NULL,
[REFID30] [varchar](255) NULL,
[REFID31] [varchar](255) NULL,
[REFID32] [varchar](255) NULL,
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[REFID42] [varchar](255) NULL,
[REFID43] [varchar](255) NULL,
[REFID44] [varchar](255) NULL,
[REFID45] [varchar](255) NULL,
[REFID46] [varchar](255) NULL,
[REFID47] [varchar](255) NULL,
[REFID48] [varchar](255) NULL,
[REFID49] [varchar](255) NULL,
[REFID50] [varchar](255) NULL,
[SPECIAL_INSTR] [varchar](1000) NULL,
[INT_STATUS] [varchar](50) NULL,
[INT_RECORD_TYPE] [varchar](50) NULL,
[INT_ORIGIN_SYS] [varchar](50) NULL,
[INT_CREATE_DATE] [datetime] NULL,
[INT_PROCESS_DATE] [datetime] NULL)
```
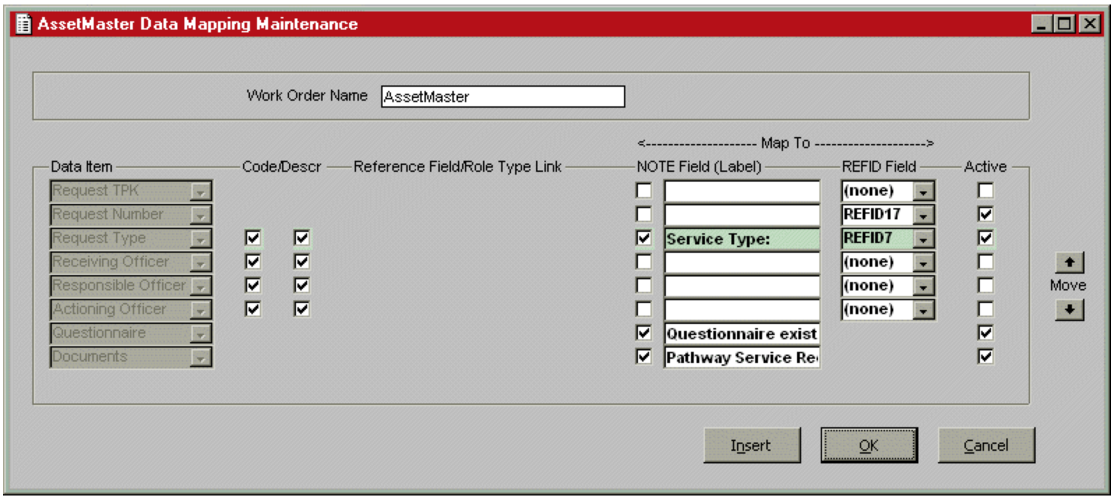
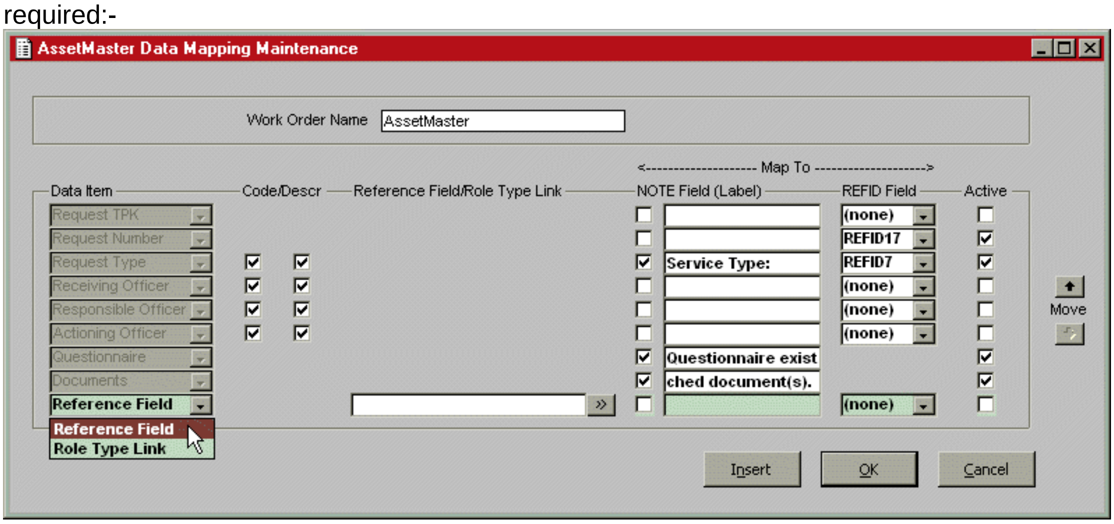

**Oracle version:**

```
CREATE TABLE "AMS_WKO_EXT"(

"WKOID" NUMBER(12),
"EXTID1" VARCHAR2(50),
"EXTID2" VARCHAR2(50),
"WKOID_USER" VARCHAR2(20),
"PROGID" NUMBER(12),
"ACTID" NUMBER(12),
"BUDGETID" NUMBER(12) NOT NULL,
"CREATED_BY" VARCHAR2(50),
"GENERATEOFFICERID" VARCHAR2(50),
"OWNINGOFFICERNAME" VARCHAR2(50),
"OWNINGDIVISIONID" VARCHAR2(50),
"CREATIONDATE" DATE NOT NULL,
"OBJECTID" NUMBER(12),
"WORK_COMPLETE" NUMBER(12),
"NOTE" VARCHAR2(2000),
"PRIORITY" NUMBER(12),
"STATUS" NUMBER(12),
"STATUS_DATE" DATE,
"MAINTTYPEID" NUMBER(12),
"WARRANTY_DATE" DATE,
"REPORTED_BY" VARCHAR2(50),
"REPORTED_DATE" DATE,
"SUPERVISORID" VARCHAR2(50),
"PARENTWKOID" NUMBER(12),
"EXP_START_DATE" DATE,
"EXP_FINISH_DATE" DATE,
"SCHED_START_DATE" DATE,
"SCHED_FINISH_DATE" DATE,
"ACT_START_DATE" DATE,
"ACT_FINISH_DATE" DATE,
"LAST_MODIFIED_BY" VARCHAR2(50),
"LAST_MODIFIED_DATE" DATE,
"CONTACTID" NUMBER(12),
"CONTRACTID" NUMBER(12),
"REFID1" VARCHAR2(255),
"REFID2" VARCHAR2(255),
"REFID3" VARCHAR2(255),
"REFID4" VARCHAR2(255),
"GLCODE1" VARCHAR2(50),
"GLCODE2" VARCHAR2(50),
"GLCODE3" VARCHAR2(50),
"GLCODE4" VARCHAR2(50),
"REFID5" VARCHAR2(255),
"REFID6" VARCHAR2(255),
"REFID7" VARCHAR2(255),
"REFID8" VARCHAR2(255),
"REFID9" VARCHAR2(255),
"REFID10" VARCHAR2(255),
"REFID11" VARCHAR2(255),
"REFID12" VARCHAR2(255),
"REFID13" VARCHAR2(255),
"REFID14" VARCHAR2(255),
"REFID15" VARCHAR2(255),
"REFID16" VARCHAR2(255),
"REFID17" VARCHAR2(255),
"REFID18" VARCHAR2(255),
"REFID19" VARCHAR2(255),
"REFID20" VARCHAR2(255),
"REFID21" VARCHAR2(255),
"REFID22" VARCHAR2(255),
"REFID23" VARCHAR2(255),
"REFID24" VARCHAR2(255),
"REFID25" VARCHAR2(255),
"REFID26" VARCHAR2(255),
"REFID27" VARCHAR2(255),
"REFID28" VARCHAR2(255),
"REFID29" VARCHAR2(255),
"REFID30" VARCHAR2(255),
"REFID31" VARCHAR2(255),
"REFID32" VARCHAR2(255),
"REFID33" VARCHAR2(255),
"REFID34" VARCHAR2(255),
"REFID35" VARCHAR2(255),
"REFID36" VARCHAR2(255),
"REFID37" VARCHAR2(255),
"REFID38" VARCHAR2(255),
"REFID39" VARCHAR2(255),
"REFID40" VARCHAR2(255),
"REFID41" VARCHAR2(255),
"REFID42" VARCHAR2(255),
"REFID43" VARCHAR2(255),
"REFID44" VARCHAR2(255),
"REFID45" VARCHAR2(255),
"REFID46" VARCHAR2(255),
"REFID47" VARCHAR2(255),
"REFID48" VARCHAR2(255),
"REFID49" VARCHAR2(255),
"REFID50" VARCHAR2(255),
"SPECIAL_INSTR" VARCHAR2(1000),
"INT_STATUS" VARCHAR2(50),
"INT_RECORD_TYPE" VARCHAR2(50),
"INT_ORIGIN_SYS" VARCHAR2(50),
"INT_CREATE_DATE" DATE,
"INT_PROCESS_DATE" DATE);
```

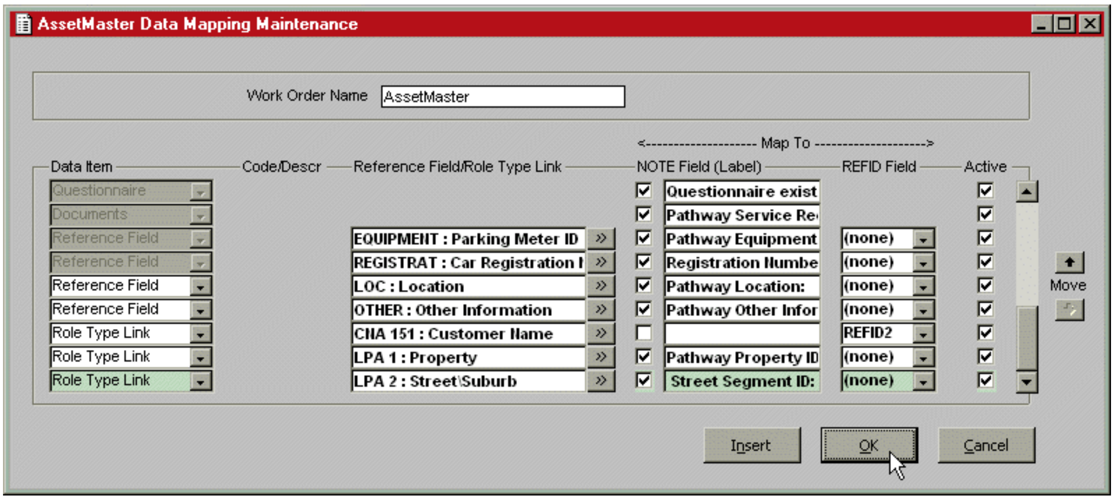
destination (if being mapped to the NOTE field, check on the NOTE field checkbox and enter the text to be used to prefix the data; if being mapped to a REFID field, select the REFID field from the dropdown list).
Not all Pathway fixed fields are available on this form: only those that were specified as being mapped to a field in CIFAMWO are included. These are:
Request TPK (TPKACRREQU.ACRREQU) : will always be mapped to EXTID2; may also optionally be mapped to NOTE and/or any REFID field
Request Number (REQUNUM.ACRREQU) : will always be mapped to EXTID1; may also optionally be mapped to NOTE and/or any REFID field
Request Type (REQTCODE.ACRREQT / DESCR.ACRREQT) : may optionally be mapped to NOTE and/or any REFID field
Receiving Officer (USERID.CSYUSER / USERNAME.CSYUSER) : USERID will always be mapped to REPORTED_BY; USERID and/or USERNAME may also optionally be mapped to NOTE and/or any REFID field
Responsible Officer (USERID.CSYUSER / USERNAME.CSYUSER) : USERID will always be mapped to SUPERVISORID; USERID and/or USERNAME may also optionally be mapped to NOTE and/or any REFID field
Actioning Officer (USERID.CSYUSER / USERNAME.CSYUSER) : USERID will always be mapped to OWNINGOFFICERNAME; USERID and/or USERNAME may also optionally be mapped to NOTE and/or any REFID field
Questionnaire : if the mapping is Active, the Questionnaire data will be mapped to SPECIAL_INSTR with the label text being mapped to the NOTE field
Documents : if the mapping is Active, the label text will be mapped to the NOTE field




Reference Fields and Role links: any Reference Field or Role Type Link (selectable via a pop-up) may be defined for mapping to NOTE and/or any REFID field. Use the Insert button to add mappings as required:-



Use the pop-up button to select the required Reference Field or Role Type Link, then map to the NOTE field and/or a REFID field.
Once the mappings are defined, the Move buttons may be used to control the order in which data items mapped to the NOTE field are concatenated.
Press OK when done.




## Hansen and AssetMaster E-mail Recipient Notification

The Hansen and AssetMaster interfaces have been enhanced to retry an update to a Pathway Customer Service Request received from the interface that failed because the Request was locked by an interactive Pathway user.

Such failures were not notified to the user, and the update was lost.

Each update that fails due to the Request being locked is now notified to a nominated Pathway User by e-mail, and the update request will be flagged for reprocessing.

### Hansen

The background process will now check via the Customer Service Global Interface whether the Request nominated on the incoming update request is locked before attempting to process it. If the Request is locked, a record will be written to the ACREXCP table with the new status field (LOCKSTATUS) set to 'LOCKED_RETRY', and the update will not be attempted. The background process will attempt to process any records with a status of 'LOCKED_RETRY' again on the next pass of the file.

This retry process will continue until the Request is found to be no longer locked and the update is successfully processed (or fails for some other reason). To prevent a plethora of e-mail notifications being sent if retries for the same update request are processed in quick succession due to light incoming traffic, a notification will not be sent if the previous notification for the same update request was sent within the last 15 minutes.

### AssetMaster

The background process will now check via the Customer Service Global Interface whether the Request nominated on the incoming update request is locked before attempting to process it. If the Request is locked, the status (INT_STATUS field on the table CIFAMNT) of the incoming update request will be set to 'LOCKED_RETRY', and the update will not be attempted. The background process will attempt to process any records with a status of 'LOCKED_RETRY' again once it has finished processing the current incoming XML document, and again the before proceeding to process any new update requests from the next incoming XML document.

This retry process will continue until the Request is found to be no longer locked and the update is successfully processed (or fails for some other reason). The ACREXCP record will then be deleted. To prevent a plethora of e-mail notifications being sent if repeated retries for the same update request are processed in quick succession due to light incoming traffic, a notification will not be sent if the previous notification for the same update request was sent within the last 15 minutes.

**E-mail Notifications**

All e-mail notifications generated from the Hansen interface will be sent to the Pathway User nominated in the Customer Service System Parameters. If no Pathway User is nominated, no e-mail notification will be sent.

All e-mail notifications generated from the AssetMaster Interface will continue to be sent to the Pathway User nominated on the AssetMaster Work Order Input Control form: however, if no Pathway User is nominated, the Pathway User nominated in the Customer Service System Parameters will be used by default (if no Pathway User is nominated in the Customer Service System Parameters, no e-mail notification will be sent).

## Confirm Interface

**Parameters:**

Set the Work Order Product in: System Administration >> Integration >> System Parameter Maintenance to "Confirm".

Setup Request Types for Confirm via System Menu >> System Administration >> Integration >> Financial System Parameters >> Financial System Interface Product >> CONFRM >> Modify >> More.

Setup Plan Types for Confirm via System Menu >> System Administration >> Integration >> Financial System Parameters >> Financial System Interface Product >> CONFRM >> Modify >> More >> Plans.

**Processing:**

A ‘Create Work Order’ option will display in the Options panel under Processes. This option is specific to Confirm and should not be seen for any other interface.

When the ‘Create Work Order’ option is invoked, the following should occur:

a. If the Request is one which is linked to a single Plan which is a registered Confirm Plan Type, then it should create the Work Order Reference, hide the "Create Work Order" Process Optioo and bold the "Work Orders" Option with details of the External Reference.

b. If the Request is one which is linked to a multiple Plans which are registered Confirm Plan Types, then it should result in user selection of the Plan Type followed by creation of the Work Order Reference, hide the "Create Work Order" Process Optioo and bold the "Work Orders" Option with details of the External Reference.

c. If the Request is one which is linked to a Plan which is not a registered Confirm Plan Type then it should result in a message: "Confirm Request could not be created as no valid Site Codes could be found. Check the Property or Street/Suburb Links.”