

Memo User Guide



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Overview

The Memo function provides the ability to append additional free format information to any Pathway entity, such as a person, a property or an infringement. This feature is useful where no specific field or facility exists to capture the required data.

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

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

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

Parameters

This Chapter describes the establishment of the parameters that control the Memo system. The Parameters should be established prior to use of the Memo System. If Word Processing documents are to be linked to the Memo System, refer to the Word Processing User Guide for further parameter set-up.

Steps to establish Memo Parameters

- ☐ Establish Word Processing parameters if memos are to use the word processing interface. (Refer to the Word Processing User Guide for more information.)
- ☐ Establish Memo Data Types.
- ☐ Select overriding file locations for individual applications if required.
- ☐ Establish Memo Groups.(for each application)
- ☐ Establish Memo Types.(for each application)

Memo Types and Memo Groups may be deleted (F11 or Edit, Delete) providing no memos have been created against the Memo Type. If you wish to make a Memo Type inactive then the Active Flag should be unchecked on the Memo Type Maintenance Form.

The following topics are covered in this section:

[Maintain Data Types](#)

[Maintain Memo Groups and Types](#)

[User Security](#)

Maintain Data Types

This section describes the set-up of file and template locations required for each Data Type. The Data Types available within the Memo system include:-

- ☐ Excel and Lotus Spreadsheet
- ☐ Sound, Image and Video
- ☐ Word Processing link

Data Types are system defined. Please contact your supplier if a Data Type is required that is not catered for.

If a Data Type is not required for your installation then the Data Type should be made "inactive" by checking off the Active flag on the Data Type Maintenance form.

Data Type Selection Form

This Form enables the appropriate Data type to be selected for maintenance.

All available Data Types will be displayed. If any Data Types are not applicable to your installation then the Data Type should be made "inactive".

Data Type	Description
EXCEL5	Microsoft Excel 5 and 7 (Office 95)
EXCEL8	Excel 97 - Office 97
IMAGE	Uniface Image File Interface
LOTUS5	Lotus 123 Version 5
SOUND	Microsoft Media Player - Sound
VIDEO	Microsoft Media Player - Video
WORD	Stowe Word Processing Interface

Data Type Selection Form

Data Type

This field contains the Data Type codes available for selection.

This field is display only and may not be maintained.

Description

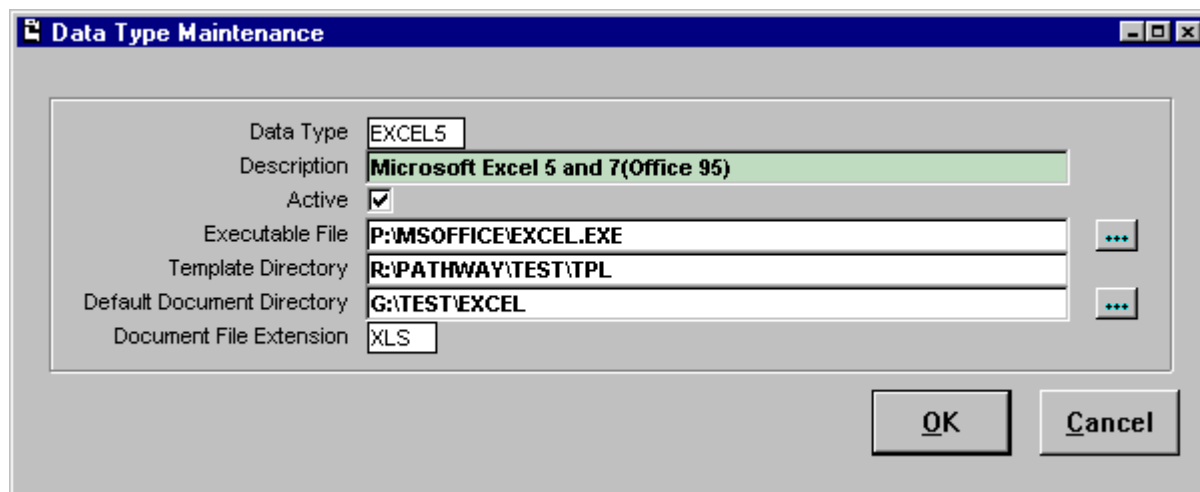
This field contains a further description of the Data Type codes available for selection.

This field is display only and may not be maintained.

Data Type Maintenance Form

This form enables document and template directory locations to be created or amended. Document directory details may be allocated for each application, or a single default directory may be used by all applications.

The Executable File name is also required for Spreadsheet Data Types.

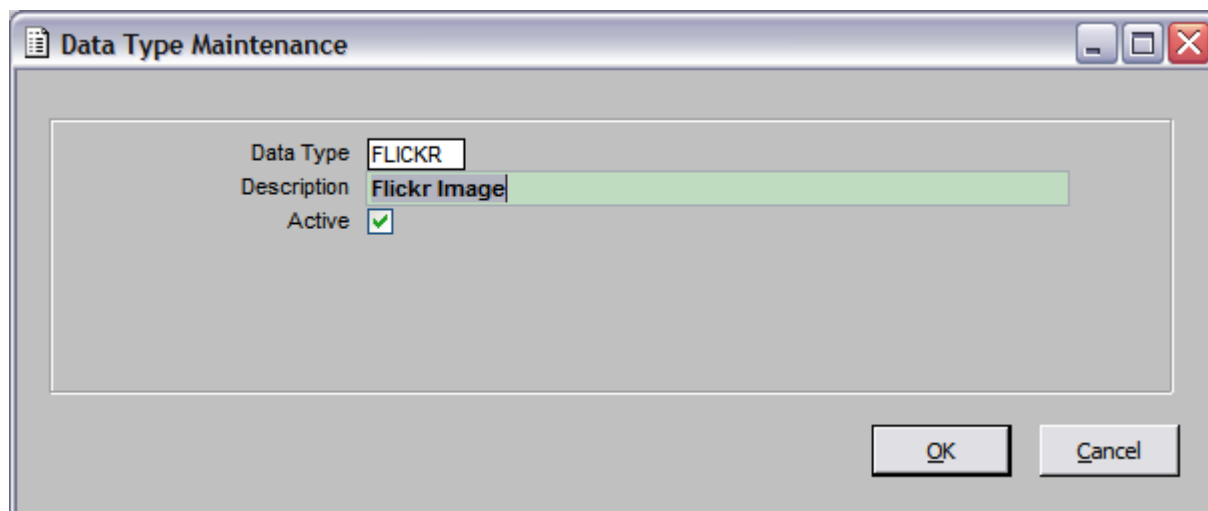


The 'Data Type Maintenance' dialog box is shown with the following fields:

Data Type	EXCEL5
Description	Microsoft Excel 5 and 7(Office 95)
Active	<input checked="" type="checkbox"/>
Executable File	P:\MSOFFICE\EXCEL.EXE
Template Directory	R:\PATHWAY\TEST\TPL
Default Document Directory	G:\TEST\EXCEL
Document File Extension	XLS

Buttons: OK, Cancel

Data Type Maintenance Form




The 'Data Type Maintenance' dialog box is shown with the following fields:

Data Type	FLICKR
Description	Flickr Image
Active	<input checked="" type="checkbox"/>

Buttons: OK, Cancel

Data Type Maintenance form for Flicker



The 'Data Type Maintenance' dialog box is shown with the following fields:

Data Type	YOUTUB
Description	YouTube Video
Active	<input checked="" type="checkbox"/>

Buttons: OK, Cancel

Data Type Maintenance form for You Tube

Memos throughout Pathway now support the use of YouTube videos in the smart client. To add a video select the memo type "YOUTUB" when creating a memo. A dialog is then available which allows a keyword search to be performed and a video selected. The video will then be played whenever the memo is viewed.

Flickr Integration

Memos throughout Pathway now support the use of Flickr images in the smart client. To add an image select the memo type "FLICKR" when creating a memo. A dialog is then available which allows a keyword search to be performed and an image selected. The image will then be displayed whenever the memo is viewed.

Note that it is the responsibility of council to organise a license with Flickr in order to use this feature. In particular a "Commercial API Key" is required. See the following for more information:

<http://www.flickr.com/services/api/tos>

<http://www.flickr.com/services/apps/create/commercial>

The Flickr API Key should be entered in the following smart client menu option (it will be a 32 character string of letters and digits).

Memos >> System Parameter Maintenance

If this is not specified then the Flickr search dialog in memos will not return any results.

Data Type

This field contains the Data Type selected for maintenance.

This field is display only and may not be maintained.

Description

This field contains the description of the Data Type. Maintenance may be performed to tailor the description of each Data Type.

For example:-

The standard description for Word Processing Data Types of 'Stowe Word Processing Interface' could be changed to reflect the word processor package being utilised.

Note:

While the data type cannot be changed, the exe file may change with later versions.

For example:-

Data Type Excel 5 may be used for Excel 5 and Excel 7 and Stowe Data Type Excel 8 may access the exe file stored in the Excel 97 directory.

Active

If this box is checked on, the Data Type will be available for use within the memo system.

If this box is checked off the Data Type will no longer be available for use. Any existing memos that use this Data Type will remain as entered. Any memos being maintained will not have this Data Type available for selection.

Executable File

This field is only required on the EXCEL and LOTUS Data Types.

This field contains the executable file name for the Data Type. The pop-up button is available to access File Manager (or similar depending on your operating system), to assist in the selection of the executable file for these Data Types.

The file name must have a file extension of .EXE.

Template Directory

This field is only required on the EXCEL and LOTUS Data Types.

This field contains the template directory, where the standard Stowe issued templates are held. The template directory path must not end in a backslash.

Directory templates for the Word Processing Data Type are defined within the Word Processing parameter options.

Refer to the Word Processing User Guide for information on how to establish the interface to Word Processing.

Default Document Directory

This field is only required on the EXCEL and LOTUS Data Types.

This field contains the Default Directory name for the storage of spreadsheets. The default directory will be utilised by all applications, unless the detail button is used to allocated separate directories by Application.

The directory path may be a single letter (e.g. R:), or a drive and a directory path (e.g. R:\EXCEL). The document path must not end in a backslash. The drive may be a local or network drive, although a network drive is advised if the documents require access by multiple staff.

Standard sub-directories will be appended automatically to the directory nominated. These sub-directories are STOWE\<Application identifier\MEMO. In the example above for name and address memos, the full directory path would be R:\EXCEL\STOWE\CNA\MEMO.

Document Directory details for the Word Processing Data Type are defined within the Word Processing parameter options.

Refer to the Word Processing User Guide for information on how to establish the interface to Word Processing.

Detail Button

This field is only required on the EXCEL and LOTUS Data Types.

By pressing the detail button, the Document Directory Maintenance form will be accessed. This enables the document directory for the storage of spreadsheets to be overridden for individual applications.

Document File Extension

This field is only displayed on the EXCEL and LOTUS Data Types.

This field contains the spreadsheet file extension of the nominated Data Type.

This field is display only and may not be maintained.

Document Directory Maintenance Form

This form enables the Document Directory to be defined for each Application (e.g. Property, Application etc). If no document directory is entered on this form, the Default Directory on the previous form will be used to store all the documents.

This form is only displayed for the EXCEL5 and LOTUS5 Data Types.

Application	Document Directory	Active
Animals	G:\TEST\EXCEL	<input checked="" type="checkbox"/>
Applications	G:\TEST\EXCEL	<input checked="" type="checkbox"/>
Authority Record	G:\TEST\EXCEL	<input checked="" type="checkbox"/>
Borrowers	G:\TEST\EXCEL	<input checked="" type="checkbox"/>
Catalogue Items	G:\TEST\EXCEL	<input checked="" type="checkbox"/>
Catalogue Record	G:\TEST\EXCEL	<input checked="" type="checkbox"/>
Customer Request	G:\TEST\EXCEL	<input checked="" type="checkbox"/>
Elections	G:\TEST\EXCEL	<input checked="" type="checkbox"/>
Infringements	G:\TEST\EXCEL	<input checked="" type="checkbox"/>

Continue Quit

Document Directory Maintenance Form

Application

This field contains a list of the available applications for which separate document directory structures may be defined.

Document Directory

This field contains the directory required for the storage of spreadsheets for the nominated Application.

The directory entered must be a valid directory.

The directory path may be single letter (e.g. R:), or a drive and a directory path (e.g. R:\EXCEL). The document path must not end in a backslash. The drive may be a local or network drive, although a network drive is advised if the documents require access by multiple staff.

Use of separate directories by application enables tighter security on the access to documents, depending on the Application in use. However it will restrict access to memos across the system and will require careful planning prior to implementation.

Active

If this box is checked on, the application will be able to use the specified Data Type (and the associated directory).

If this box is checked off the application will not able to use the specified Data Type (or the associated directory).

Maintain Memo Groups and Types

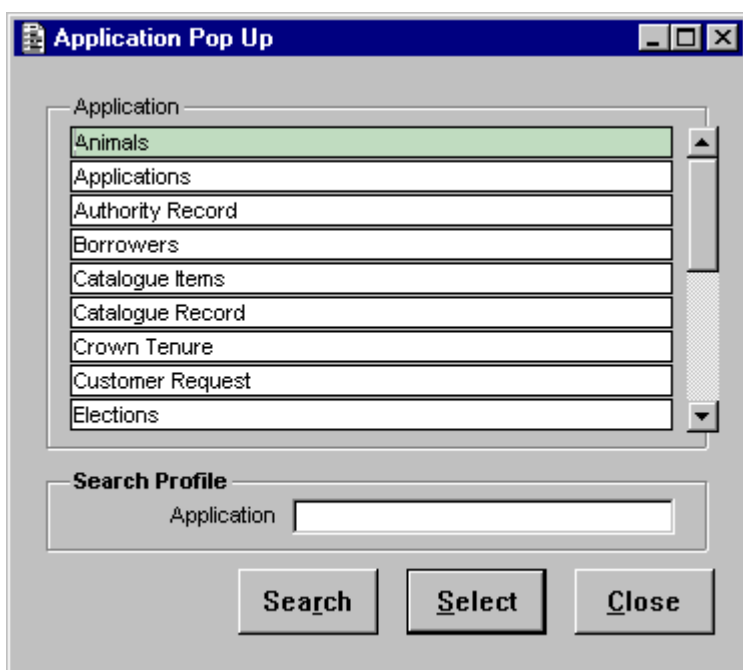
This section describes how to set-up the Memo structure.

This structure involves Memo Groups and Memo Types. A multiple level structure enables flexibility when performing the reporting and purging functions.

Memo Groups and Types are defined for each application (e.g. Property, Name and Address, Rates etc)

Application Pop Up Form

This form enables the selection of the application, for which Memo Groups and Memo Types are to be defined.



Application Pop Up Form

Application

This field contains a list of the applications available to be linked to memos. By selecting an application, the required Memo Groups and Memo Types for that application may be defined.

The Application codes are system defined and may not be maintained.


Search Profile - Application

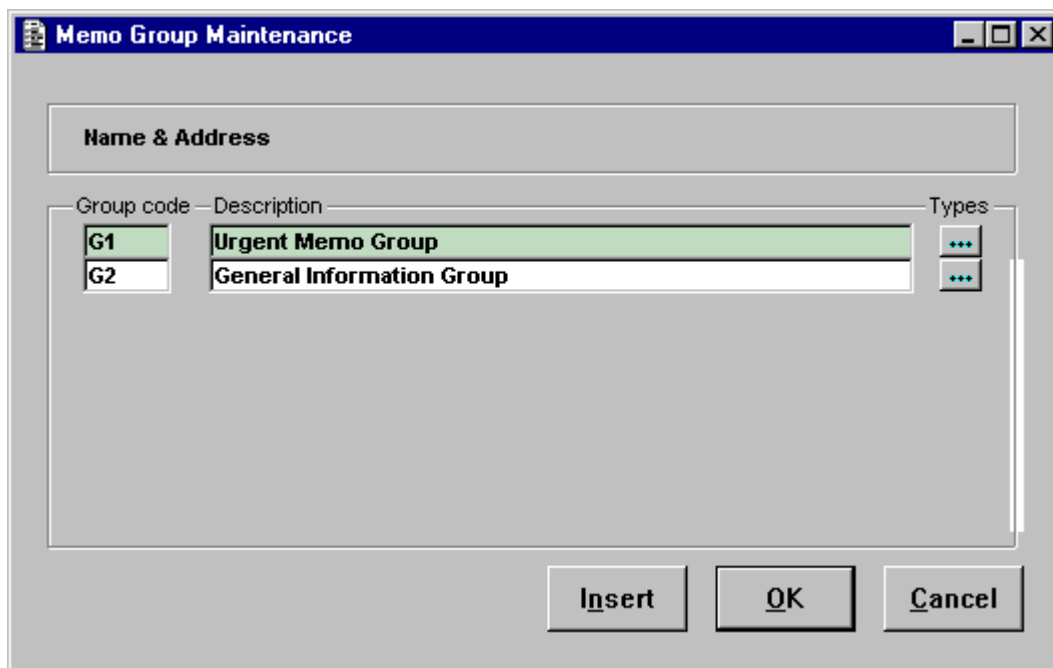
Enter an Application on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

Memo Group Maintenance Form

This form enables the Memo Groups to be defined for the selected application. Memo Groups are the highest grouping level within the memo function and assist in the selection of memos during reporting and purging functions.

The related application for the listed Memo Groups displays at the top of the form.

 If no Memo Groups are required for reporting or purging purposes, a single Memo Group should be defined for each application to make up the highest grouping level.



The screenshot shows the 'Memo Group Maintenance' window. It has a title bar with a standard icon, a minus button, a maximize button, and a close button. Below the title bar is a section labeled 'Name & Address' with a text input field. Underneath is a table with three columns: 'Group code', 'Description', and 'Types'. The table contains two rows: the first row has 'G1' in the first column, 'Urgent Memo Group' in the second, and a button with three dots in the third; the second row has 'G2' in the first column, 'General Information Group' in the second, and another button with three dots in the third. At the bottom of the window are three buttons: 'Insert', 'OK', and 'Cancel'.

Group code	Description	Types
G1	Urgent Memo Group	...
G2	General Information Group	...

Memo Group Maintenance Form

Application Description

This field contains the description of the application for which the memo groups are being maintained.

This field is display only and may not be maintained.

Group Code

This field contains the code which identifies each Memo Group. A six character alphanumeric code may be used to identify each Memo Group.

This field is mandatory.

Description

This field provides a detailed description of each Memo Group code.

This field is mandatory.

Types Detail Button

Pressing this button will present the Memo Types Maintenance Form on which memo types may be established for the Memo Group.

Memo Type Maintenance Form

This form enables the Memo Types to be defined within the selected Memo Group, for the selected application.

The use of memo types will further assist in the selection of memos during reporting and purging functions. A default Data Type may be defined for each memo type. The Data Type enables linking of Word Processing documents, Spreadsheets, Video and other options to memos.

The related application name and Memo Group description displays at the top of the form.

The screenshot shows the 'Memo Type Maintenance' window. At the top, a title bar reads 'Memo Type Maintenance'. Below it, a section header says 'Applications - Applications for Building - PACA - urgent type memos'. The main area contains a table with columns 'Memo Type', 'Description', and 'Active'. The table has two rows: one with 'URG' and 'urgent memo for type' (both highlighted in green), and another with 'THIS' and 'this is it'. To the right of the table are 'Move' buttons with up and down arrows. Below the table is a detailed configuration section for the 'URG' memo type. It includes fields for 'Memo Type' (URG), 'Description' (urgent memo for type), 'Effective for' (6 Week(s)), 'Terminate after' (8 Week(s)), 'Data Type' (with a pop-up button '>>'), 'Urgent' (checked), 'User Security' (unchecked), and 'Display on Linking from' (empty). At the bottom are four buttons: 'Links', 'Insert', 'Continue', and 'Quit'.

Memo Type Maintenance Form

Memo Type

This field contains the code which identifies each Memo Type
This field is mandatory.

Active

If this box is checked on, the Memo Type is available for selection and may be linked to individual memos.

If this box is checked off, the Memo Type is no longer available for selection. Any memo records created using this Memo Type will remain as entered. Any memo records being created will not have this Memo Type available.

Description

This field provides a detailed description of each Memo Type code.

This field is mandatory.

Data Type

This field contains a default Data Type for the particular Memo Type. Use of a default Data Type is optional. If specified, the default may be overridden when creating individual memos if required.

The pop-up button enables a Data Type to be selected from a list of available types (See Data Type Pop Up form). Eight options are available from the pop-up list, however Data Types that have been made "inactive" will not be included for selection.

- ☐ LOTUS Spreadsheet
- ☐ EXCEL Spreadsheet
- ☐ Sound
- ☐ Video

- ☐ Images
- ☐ Word Processing
- ☐ Flicker
- ☐ You Tube

Effective for

These fields enable a default effective period to be determined. This will enable the Effective To Date on a memo to be calculated automatically. The first field contains a numeric and the second field contains a qualifier for this number. Three options are available in the drop-down list

- ☐ Week(s)
- ☐ Month(s)
- ☐ Year(s)

The combination of these fields will indicate the effective period (e.g. 2 Weeks or 4 Months).

Initially, the numeric field will be blank awaiting user input. However, as these fields are mandatory, if they are not entered, users will be warned that the fields have not been entered.

When a memo is created using a Memo Type with an effective duration of one week, for example, the memo will display until the Expiry Date. After the Expiry Date has passed the memo will only display via the use of the 'Display Expired Memos' flag on the Memo Maintenance form.

Terminate after

These fields enable a default termination period to be determined. This will enable the Termination Date on a memo to be calculated automatically. The first field contains a numeric and the second field contains a qualifier for this number. Three options are available in the drop-down list

- ☐ Week(s)
- ☐ Month(s)
- ☐ Year(s)

The combination of these fields will indicate the termination period (e.g. 10 Months, 3 Years).

Initially, the numeric field will be blank awaiting user input. However, as these fields are mandatory, if they are not entered, users will be warned that the fields have not been entered.

This field is used in Memo Reporting and Memo Purging.

Urgent

If this box is checked on, the Memo Type is defined as Urgent.

All memos created with an Urgent Memo Type will become Urgent Memos. When an urgent memo is attached to a record (for example, a name), whenever that record is accessed the memo will be displayed before any other process may begin.

For example:

Urgent Memos linked to a particular property - will display first whenever the property is accessed via Property Maintenance.

An Urgent Memo will not be displayed if today's date is less than the "Effective From" date or greater than the "Effective To" date on the memo.

User Security

If User Security has been set in the Secured Function then the User Security Button is displayed on this form. Otherwise this Option is not seen by the User.

Upon selecting the User Security Option a list of Users is displayed showing the Security they have as to whether they are able to Add, Change or Delete this particular Memo Type. Upon creating a new Memo Type no Users will have access to the Memo Type. The User Security Option needs to be selected and the appropriate Users allocated the correct Add, Change and Delete options.

Cross App.

If this box is checked on, the Memo Type is defined as Cross Application. All memos created under the Cross Application Memo Type can be accessed from applications other than the one from which they were created. This Cross Application option relates specifically to Property and Name and Address memos.

For example:

A memo created against a particular name in the Name and Address Register, if cross application, will be able to be accessed wherever that name is linked to (Property Maintenance, Applications Maintenance etc)

Display on Linking from

This field determines whether an Urgent Memo will display when the record is selected from an application listed here. This field is only available when the Urgent flag is checked ON. When this field displays, the user is able to select the application/s to which this will apply. For example, a certain Memo Type in Property may only be valid to be shown in the Animals module and not in the Rates module. Alternatively, a Memo Type assigned to a Name may be applicable to Rates, Debtors, Water Billing, but not any other module. The Links button will display the Linked Applications Maintenance form to enable selection of the required modules.

Move Buttons

By pressing the Move buttons, the sequence of Memo types within a Memo Group can be amended.

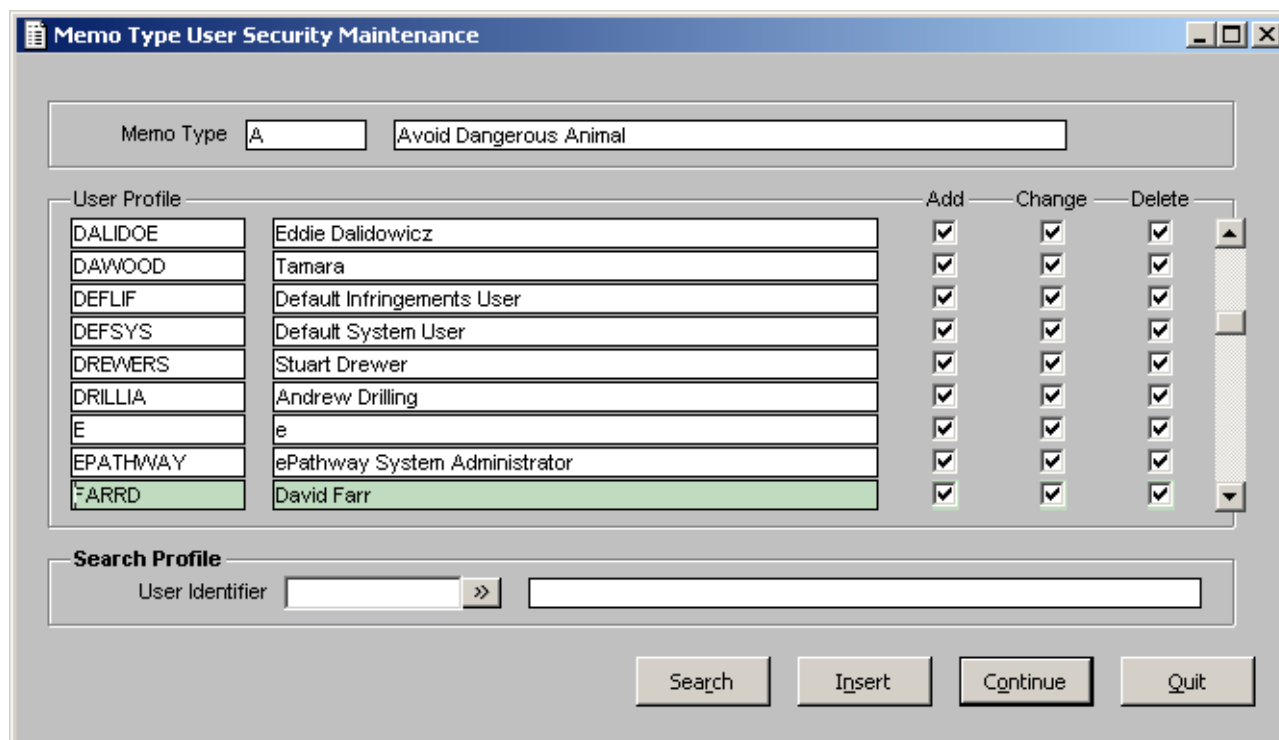
This enables the display of the Memo Structure - Groups/Types to be tailored for display when adding or maintaining memos.

User Memo Type Security Maintenance Form

If User Security over Memos has been defined within the Secured Functions then upon selecting the User Security Option from the Memo Type Maintenance Form will display this form. From here the setting of Users and their ability to Add, Change or Delete a Memo Type are defined. Only those Users who have been defined within the Menu Parameters / User Maintenance Menu as being allowed to Add, Change or Delete Memos are able to be selected for set up within this form.

When a new Memo Type has been defined and the User accesses this form for the first time for the Memo Type there will be no Users displayed. Selecting the Insert Button will allow selection of those Users who are to have access and use of the Memo Type.

Additionally if the User has access to the Menu Parameters / User Maintenance Menu then the Memo Security can be set there.



The screenshot shows a software window titled "Memo Type User Security Maintenance". At the top, there are two input fields: "Memo Type" with the value "A" and a description field containing "Avoid Dangerous Animal". Below this is a "User Profile" section containing a table of users. To the right of the table are three columns of checkboxes labeled "Add", "Change", and "Delete". At the bottom, there is a "Search Profile" section with a "User Identifier" field and a search button. Below the search section are four buttons: "Search", "Insert", "Continue", and "Quit".

User Profile		Add	Change	Delete
DALIDOE	Eddie Dalidowicz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DAWOOD	Tamara	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DEFLIF	Default Infringements User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DEFSYS	Default System User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DREWERS	Stuart Drewer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DRILLIA	Andrew Drilling	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
E	e	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EPATHWAY	ePathway System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FARRD	David Farr	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Search Profile
 User Identifier: >>
 Search Insert Continue Quit

Memo Type User Security Maintenance Form

Memo Type

The Memo Type Code and its Description that the Security is being defined for is displayed in this section of the Form.

User Profile

The User Identify and Name are displayed for the User that has been allowed use of the Memo Type. For each of the Users selected the Add, Change and Delete options need to be defined.

ADD Checkbox

Upon selecting a Name from the Insert Option the Add checkbox is automatically checked 'On'. If the selected User should not be able to 'Add' this particular Memo Type then the Add checkbox should be checked 'Off'.

CHANGE Checkbox

Upon selecting a Name from the Insert Option the Change checkbox is automatically checked 'On'. If the selected User should not be able to 'Change' this particular Memo Type then the Change checkbox should be checked 'Off'.

DELETE Checkbox

Upon selecting a Name from the Insert Option the Delete checkbox is automatically checked 'On'. If the selected User should not be able to 'Delete' this particular Memo Type then the Delete checkbox should be checked 'Off'.

Search Profile – User Name

If a particular name is required to be searched for then the User Id can be entered into this field and the Search Option selected to display that User's details for the particular Memo Type.

If the entered User has not been assigned access to the Memo Type then the form will display with no information and the User will need to select the Insert Option and select the required User to add them to the list of Users available to use the Memo Type.

Linked Applications Maintenance Form

The form allows selection of modules to be assigned to the 'Display on linking from' field in the Memo Type Detail Maintenance form. It allows the user to define from which other modules Urgent Memos should be displayed when a record with an Urgent Memo is selected to be linked.

Linked Applications Maintenance Form

Available Applications

Valid Module Links will display in the Available Applications section (on the left hand side of the form). Any or all of these applications may be moved to the "Selected" side of the form.

The following Applications can be assigned to display Name and Address Urgent Memos:

- Customer Service
- Registers
- Applications
- Debtors
- Licensing
- Rates Accounting
- Victorian Valuations
- Water Billing
- Animal Control

The following Applications can be assigned to display Property Urgent Memos:

- Customer Service
- Registers
- Applications
- Debtors
- Licensing
- Rates Accounting
- Water Billing
- Animal Control

The following Applications can be assigned to display Customer Service Urgent Memos:

- Registers

The following Applications can be assigned to display Applications and Licensing Urgent Memos:

- Customer Service
- Registers

The following Applications can be assigned to display Rates Urgent Memos:

- Customer Service

- Registers
- Victorian Valuations

The following Applications can be assigned to display Registers Urgent Memos:

- Customer Service

Selected Applications

These fields will display the modules which have been selected to "Display on Linking from". These modules will default into the "Display on Linking From" field on the Memo Type Detail Maintenance form. See further details under the previous field.

Select / Remove Buttons

The Select / Remove Buttons allow the User to select and remove the Applications that are to be used in the linking process.

Data Type Pop Up Form

This form contains a list of the available Data Types which may be linked to a Memo Type as a default.

Data Type	Description
EXCEL5	Microsoft Excel 5 and 7 (Office 95)
EXCEL8	Excel 97 - Office 97
IMAGE	Uniface Image File Interface
LOTUS5	Lotus 123 Version 5
SOUND	Microsoft Media Player - Sound
VIDEO	Microsoft Media Player - Video
WORD	Stowe Word Processing Interface

Search Profile

Data Type

Data Type Pop Up Form

Data Type

This field contains a list of the available Data Type Codes which may be selected to be linked to a Memo Type.

This field is display only and may not be maintained.

Six options are available from the pop-up list, however Data Types that have been made "inactive" will not be included for selection.

- ☐ LOTUS Spreadsheet
- ☐ EXCEL Spreadsheet
- ☐ Sound
- ☐ Video
- ☐ Images
- ☐ Word Processing

Description

This field contains a description of each Data Type.

This field is display only and may not be maintained.

The descriptions for Data Types may be maintained within the Data Type Maintenance form

Search Profile - Data Type

Enter a Data Type on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

User Security

User Security over Memos allows the control of who is able to Add, Change or Delete Memo Types from the various Modules that use Memos.

This is a Secured Function and can only be used if the option within the Secured Functions area of the System Parameters has been authorised.

Memo Security can be defined within the Menu Parameters / User Maintenance Option or from within the Memo Type Maintenance form.

Memo Type User Security Maintenance Form

If User Security over Memos has been defined within the Secured Functions then upon selecting the Security Option from the User Maintenance option within the Menu Parameters will display this form. From here the setting for a particular User and their ability to Add, Change or Delete for a Memo Type are defined.

Optionally, when a new Memo Type has been defined and the User accesses the User Security form they are able to maintain the Add, Change and Delete options from there. Selecting the Move Button will allow selection of those Memo Types that the particular User is to have access to.

User Memo Type Security Maintenance

User Authority

User Identifier: BARRYD Dave Barry

Active: ☒

Available Memo Types

T1	Special Instructions before release
T2	Special Instructions after release
T3	Functional Text
T8	word with no template
BARK	Bark has been damaged
GRAFF	Graffiti
SCRTCH	Scratched Surface
WARP	Warped Surface
BASE	base memo

Selected Memo Types

TT	URGENT MEMO TEST
URG	Urgent and Cross App Memo Type
URG2	another urgent memo 2
URGENT	urgent cross apps memo
WVB	Warrens Word eg
WORD8	word 8 memo
ALLTYP	test of memo in registers alltypes
EC1	Eddi's memo 1
NORM	normal memo

Add - Change - Delete

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Application

Application: LAP - Applications

Class: Applications Testing - PACC

Group: normal memos for pacc

Application

Application: CRG - Registers

Class: Links from Registers to other applications

Group: register memo

Application/Entity: >>

OK Cancel

User Memo Type Security Maintenance Form

User Authority – User Identifier

The selected User's Identifier and Name are displayed in this section of the form.

User Authority – Active

Upon first entry to this form the Active flag is set 'On'.

Available Memo Types

The Available Memo Type Codes and their Description are displayed in this section of the form. From this list it is possible to select the appropriate Memo Types for the various Modules that the User is able to either Add, Change or Delete.

As focus is moved down the List of Available Memo Types the Module that the Memo Type has been defined for is displayed in the Application/Entity fields.

Additionally if only those Memo Types for a particular Application/Entity are required then enter in the required information into the Application/Entity fields and the list of Available Memo Types for the entered Application/Entity will be displayed.

Selected Memo Types

The Selected Memo Type Codes and their Description are displayed in this section of the form. This list displays the selected Memo Types for the various Modules that the User is able to either Add, Change or Delete.

ADD Checkbox

Upon selecting a Memo Type from the Available Memo Type List the Add checkbox is automatically checked 'On'. If the selected User should not be able to 'Add' this particular Memo Type then the Add checkbox should be checked 'Off'.

CHANGE Checkbox

Upon selecting a Memo Type from the Available Memo Type List the Change checkbox is automatically checked 'On'. If the selected User should not be able to 'Change' this particular Memo Type then the Change checkbox should be checked 'Off'.

DELETE Checkbox

Upon selecting a Memo Type from the Available Memo Type List the Delete checkbox is automatically checked 'On'. If the selected User should not be able to 'Delete' this particular Memo Type then the Delete checkbox should be checked 'Off'.

Available Memo Types Application / Class / Group

The Application, Class and or Group will display for the Available Memo Types as the focus is moved from one Type to the next. This enables the User to see the Application that the Memo Type belongs to, the Class within that Application that the Memo Group belongs to (if applicable) and also the Group that the Memo Type belongs to.

For example if focus was placed on a Memo Type for Animals then all that would be shown in this area would be Application of 'LAN – Animals' and the Group Description for the Group that the Memo Type is for.

For an Application this information would show the Application of 'LAP – Applications', Class Description of the Class that the Memo Type has been defined for and the Group Description that the Memo Type belongs to.

Selected Memo Types Application / Class / Group

The Application, Class and or Group will display for the Selected Memo Types as the focus is moved from one Type to the next. This enables the User to see the Application that the Memo Type belongs to, the Class within that Application that the Memo Group belongs to (if applicable) and also the Group that the Memo Type belongs to.

For example if focus was placed on a Memo Type for Animals then all that would be shown in this area would be Application of 'LAN – Animals' and the Group Description for the Group that the Memo Type is for.

For an Application this information would show the Application of 'LAP – Applications', Class Description of the Class that the Memo Type has been defined for and the Group Description that the Memo Type belongs to.

Application/Entity

The Application/Entity field displays the Application that the Memo Type has been defined against.

As focus is moved down the List of Available Memo Types the Module that the Memo Type has been defined for is displayed in this field.

Additionally if only those Memo Types for a particular Application/Entity are required then enter in the required information into the Application/Entity fields and the list of Available Memo Types for the entered Application/Entity will be displayed.

Memo Type User Security

Memo Type User Security allows a default level of access to be set for each Memo Type and for this default level of access to be applied for all users who have not explicitly been granted access to the Memo Type.

Access to the Memo Type User Security and/or the Merge Type User Security authorized functions is required to use this new feature.

Defining the Default User

Pathway allows a Default User to be assigned on the System Parameter Maintenance form via the *System Administration ► System Parameters ► System Parameter Maintenance* menu option:-

Installation Details	
Installation Code	REL
Installation Name	Release Environment
Label Customisation Code	
Assignment File	.8401\Set.asn
Initialisation File	.8401\Set.ini
Standard Update Queue	STANDARD
Standard Report Queue	STANDARD
Alternate Report Queue	STANDARD
Background Job Queue	BACKGROUND
Administrator	SCAADMIN
Default User	DEFAULT

☒ Include Environment name in Subject for e-mail notifications
☒ Database Name: PthRel0307
☐ This Name:
 Subject Template: [&env;] ⊂ Name in upper case: ☐ Sample: ...

Options: ☐ Licence Details

Fig.1: System Parameter Maintenance

Note that the User Id of the selected user does not have to be 'DEFAULT': any User Id may be selected as the Default User.

A Default User may also be assigned to each Pathway module on the Application Code Maintenance form via the *System Administration ► System Parameters ► Application Code Maintenance* menu option:-

Application	Description	Active	Licence	Interface
ABK	Bookings Management	<input checked="" type="checkbox"/>
ACR	Customer Service	<input checked="" type="checkbox"/>
ACV	Administration Conversion	<input checked="" type="checkbox"/>
ARP	Administration Report	<input checked="" type="checkbox"/>
CAR	Accounts Receivable Interface	<input checked="" type="checkbox"/>
CAU	Auditing	<input checked="" type="checkbox"/>
CBT	Batch Processing	<input checked="" type="checkbox"/>
CCL	Calendar	<input checked="" type="checkbox"/>
CCP	Customer Profile	<input checked="" type="checkbox"/>

Application Details		
Default Calendar	ABK	Bookings Calendar
Standard Update Queue	STANDARD	Standard Job Queue
Standard Report Queue	STANDARD	Standard Job Queue
Alternate Report Queue	STANDARD	Standard Job Queue
Background Job Queue	BACKGROUND	Background Receipting
Default User	DEFAULT	Default User

Fig.2: Application Code Maintenance

The Default User defined at the system level will be used unless overridden:-

Application	Description	Active	Licence	Interface
ABK	Bookings Management	<input checked="" type="checkbox"/>
ACR	Customer Service	<input checked="" type="checkbox"/>
ACV	Administration Conversion	<input checked="" type="checkbox"/>
ARP	Administration Report	<input checked="" type="checkbox"/>
CAR	Accounts Receivable Interface	<input checked="" type="checkbox"/>
CAU	Auditing	<input checked="" type="checkbox"/>
CBT	Batch Processing	<input checked="" type="checkbox"/>
CCL	Calendar	<input checked="" type="checkbox"/>
CCP	Customer Profile	<input checked="" type="checkbox"/>

Application Details		
Default Calendar	ABK	Bookings Calendar
Standard Update Queue	STANDARD	Standard Job Queue
Standard Report Queue	STANDARD	Standard Job Queue
Alternate Report Queue	STANDARD	Standard Job Queue
Background Job Queue	BACKGROUND	Background Receipting
Default User	DEFAULTABK	Bookings Default User

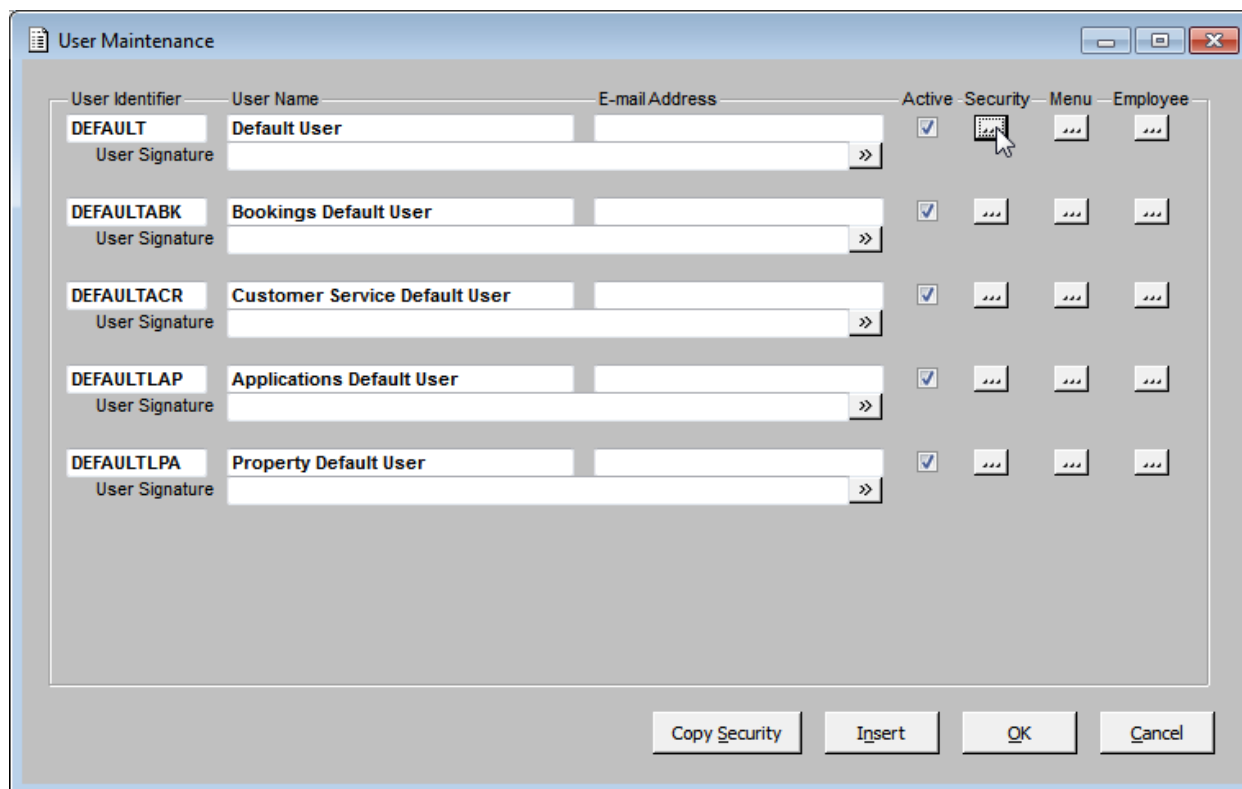
Fig.3: Application Code Maintenance – Default User overridden for ABK module

When checking the Default User access to a Memo Type or Merge Type, the Default User defined at the module level will be used. If the Default User has not been overridden at the module level, the Default User defined at the system level will be used.

Note that if the Default User is changed at either the module level or the system level, the change will not be reflected in existing Pathway sessions, because the information is cached on session start-up. New Pathway sessions must therefore be started for the new Default User value(s) to take effect.

User Maintenance

The default level of access is provided by creating or modifying the Default User record(s) in the *System Administration* ► *Menu* ► *User Maintenance* menu option:-



The **User Maintenance** dialog box is used to manage default users. It features a table with columns: User Identifier, User Name, E-mail Address, Active, Security, Menu, and Employee. Below the table are buttons for Copy Security, Insert, OK, and Cancel.

User Identifier	User Name	E-mail Address	Active	Security	Menu	Employee
DEFAULT	Default User		<input checked="" type="checkbox"/>			
DEFAULTABK	Bookings Default User		<input checked="" type="checkbox"/>			
DEFAULTACR	Customer Service Default User		<input checked="" type="checkbox"/>			
DEFAULTLAP	Applications Default User		<input checked="" type="checkbox"/>			
DEFAULTLPA	Property Default User		<input checked="" type="checkbox"/>			

Fig.4 User Maintenance

As many module Default User records as desired may be created. It is not required to create one for each module, as modules with no Default User override will use the system-level Default User.

Memo Types and Merge Types for which default access is to be defined may then be assigned to each Default User via the Security detail button and the User Security form:-



The **User Security** dialog box is used to assign security to a specific user. It includes fields for User Identifier and User Name, and a list of security options with checkboxes.

User Identifier	User Name
DEFAULT	Default User

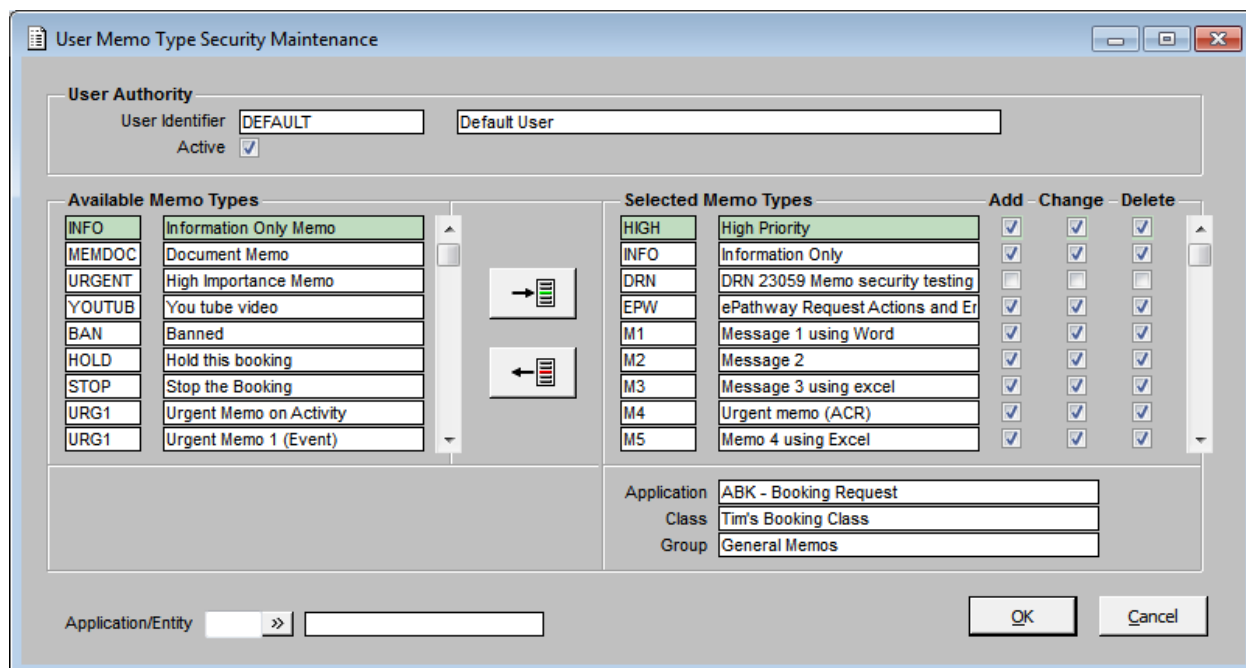
- ☒ GIS Security
- ☐ Document Management
- ☐ Conditions Security
- ☐ Memo Security
- ☐ Booking Class Security
- ☐ Merge Type Security

Buttons: Copy Security, Close

Fig.5: User Security

The Memo Security and Merge Type Security detail buttons may then be used to assign Memo Types (via the User Memo Type Security Maintenance form) and Merge Types (via the User Merge Type Security Maintenance form) to the Default User.

User Memo Type Security Maintenance



User Memo Type Security Maintenance

User Authority
 User Identifier: Default User
 Active: ☒

Available Memo Types		Selected Memo Types		Add - Change - Delete		
INFO	Information Only Memo	HIGH	High Priority	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MEMDOC	Document Memo	INFO	Information Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
URGENT	High Importance Memo	DRN	DRN 23059 Memo security testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
YOUTUB	You tube video	EPW	ePathway Request Actions and Er	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BAN	Banned	M1	Message 1 using Word	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HOLD	Hold this booking	M2	Message 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
STOP	Stop the Booking	M3	Message 3 using excel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
URG1	Urgent Memo on Activity	M4	Urgent memo (ACR)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
URG1	Urgent Memo 1 (Event)	M5	Memo 4 using Excel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Application:
 Class:
 Group:

Application/Entity: >>

Fig.3: User Memo Type Security Maintenance

Assign any Memo Types for which default access is to be defined, and set the Add, Change and Delete flags as desired for each assigned Memo Type.

For each assigned Memo Type, the default level of access will be applied for any User for whom explicit access to the Memo Type has not been defined.

For each Memo Type that is not assigned, no default level of access will be applied for a User for whom explicit access to the Memo Type has not been defined.

Memo Maintenance

This Chapter describes the maintenance processes available for the memo system. This involves the ability to attach memos and their associated documents (word processing, spreadsheet etc) to the required application record. Memos may be attached to the following applications.

- ☐ Applications
- ☐ Customer Service
- ☐ Elections
- ☐ Name and Address
- ☐ Rates
- ☐ Property
- ☐ Infringements
- ☐ Animals
- ☐ Licensing
- ☐ Meter Reading
- ☐ Registers
- ☐ Valuations
- ☐ Workflow

The following topics are covered in this section:

[The Memo Glyph](#)
[Memo Maintenance](#)
[Property Search](#)

The Memo Glyph

A Memo Glyph is used within these applications to indicate that memo details exist for a particular record. The "Glyph" is displayed in the top left hand corner of the application record form.

Memo details can be accessed from this glyph by double clicking, or from the Associated, Memo item on the Menu bar.



Memo Glyph

Memos may also be attached to individual data items on a record. In the example of the Infringements system a memo may be placed on a Registration Number as well as on the Infringement record. In this example whenever a Registration Number is used on multiple Infringement records the memo will be displayed. When memos exist on data items the glyph will be displayed as close as possible to the data item.

Memo Maintenance provides the function for memos to be added, deleted or changed. Memos may also be linked to various data types (for example Word Processing documents, spreadsheets, video files, sound files or picture files). Memo Maintenance also provides for the ability to move memos between Memo Types.

Steps to create a memo record

- ☐ Open the record that you wish to attach a memo to. e.g. a name record
- ☐ Access the memo system, either by double clicking on the Memo Glyph (if memos already exist) or by selecting Memo from the "Associated" menu item.
- ☐ From the Memo Selection Form press the New Button.
- ☐ From the Memo Type Selection Form highlight the memo type you wish to create and press the Select Button.
- ☐ On the Memo Maintenance Form enter the memo details and press Ok.
- ☐ To return to the maintenance form of your application press Close on the Memo Selection Form.

Steps to delete a memo record

Memo records may be deleted individually or via a bulk batch process. Refer to the Memo Purge chapter in this document to delete memos via batch processing.

- ☐ Access the memo you wish to delete.
- ☐ Press F11 or select "Edit, Delete" from the menu bar.
- ☐ A message will be displayed to confirm or cancel the delete. Press Yes to delete the memo or No to cancel the delete.

If a memo is deleted that has a Scope of Application then that memo will be removed from all records.



When deleting a memo any unique associated documents will also be deleted. Documents will not be deleted if they are linked to the Memo Type level.

Memo Maintenance

Memo Selection Form

This form displays all existing Memos (Precis details are displayed) and their associated Memo Types. This form is accessed by either clicking on the “Glyph” on the application record form or by selecting “Associated, Memo” from the Menu Bar. New Memos may be added from this form, or memos moved between Memo Types. Existing memos may be accessed by pressing the detail button alongside the memo text.

If no memos exist for the current record then this form will be blank.

Press the New Button to add a new memo. The Memo Type Selection form will be displayed in order to choose an appropriate Memo Type on which to base your memo.

Memos are displayed by ascending Effective Date sequence within Memo Type.

The screenshot shows a window titled "Memo Selection". Inside, there's a "Memo Type" section with a list box containing "TYPE 2", "Urgent memo 3", and "Please Note". To the right of the list box are checkboxes for "Urgent" and "Active", both of which are checked. Below the list box is a "Detail" section with a text area containing "Memo 3". At the bottom of the form is a checkbox labeled "Display Expired Memos" which is checked. To the right of this checkbox are three buttons: "Move", "New", and "Close".

Memo Selection Form

Memo Type

This field contains a list of existing Memo details. Precis details from each memo are displayed, grouped within Memo Type.

Memo Type descriptions are displayed in “Bold” font.

Precis descriptions are displayed in “Normal” font.

Only Memo Types with existing Memo details will be displayed.

The Memo entries within each Memo Type are displayed in order from the most recent to the oldest.

The Memo Types are displayed in the order in which they were sequenced on the Memo Type Maintenance form.

Detail Button

By pressing this button, the memo may be accessed for further maintenance or enquiry.

Urgent

If this box is checked on, it indicates that the associated Memo Type is for Urgent memos. Therefore all memos listed under this Memo Type will be urgent. Any memos created as an Urgent memo will be displayed first when accessing an application record.

This field is display only and may not be maintained.

Active

If this box is checked on, it indicates that the associated Memo Type is active, which means that new memos may be linked to this Memo Type.

If this box is checked off, it indicates that the Memo Type will not be available when creating new memos.

This field is display only and may not be maintained.

Detail

The detail box displays any detail attached to a memo.

Display Expired Memos

This flag allows users to swap the display of Memos between current and expired memos.

If there are no expired Memos for an Application record, the check box will not appear.

If an application record only has expired memos the form will be displayed with the check box visible.

Move Button

If pressed, this button will initiate the ‘Move Memo’ function.

To move a memo from one Memo Type to another:-

- ☐ Select the memo that you wish to move.
- ☐ Press the Move Button - The Memo Type Selection form will be displayed.
- ☐ Select the Memo Type that you wish to move the memo to.
- ☐ Press the Select Button.

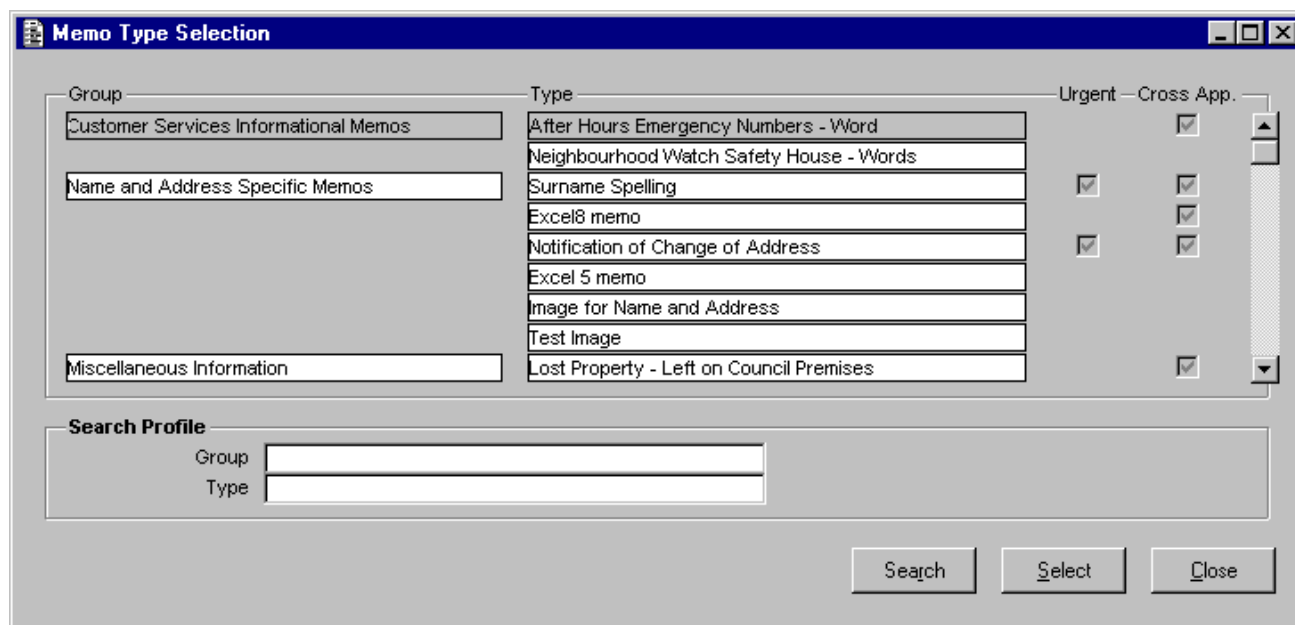
If you are moving a memo that has been designated as Urgent and you choose to move it to a type which is not urgent the following message will be displayed:

“You are moving an Urgent memo to a Non-urgent memo type. Do you wish to proceed?”

If you respond “Yes” the memo will be moved and will not have the “Urgent:” status set.

If you respond “No” the memo will not be moved and will remain attached to the previous memo type.

Memo Type Selection Form



The **Memo Type Selection** form is a window with a title bar containing a document icon and the text "Memo Type Selection". It features three main columns: "Group", "Type", and "Urgent - Cross App.". The "Group" column contains three text boxes with the following text: "Customer Services Informational Memos", "Name and Address Specific Memos", and "Miscellaneous Information". The "Type" column contains a list of memo types: "After Hours Emergency Numbers - Word", "Neighbourhood Watch Safety House - Words", "Surname Spelling", "Excel8 memo", "Notification of Change of Address", "Excel 5 memo", "Image for Name and Address", "Test Image", and "Lost Property - Left on Council Premises". The "Urgent - Cross App." column contains two columns of checkboxes. The first column has checkboxes for "After Hours Emergency Numbers - Word", "Surname Spelling", "Excel8 memo", "Notification of Change of Address", and "Lost Property - Left on Council Premises". The second column has checkboxes for "Neighbourhood Watch Safety House - Words", "Excel 5 memo", "Image for Name and Address", and "Test Image". Below these columns is a "Search Profile" section with two text boxes labeled "Group" and "Type". At the bottom right are three buttons: "Search", "Select", and "Close".

Memo Type Selection Form

Group

This field displays the Memo Group as set up in Memo Parameters. This field is display only and cannot be maintained.

Type

This field contains the description of the Memo Type as set up in Memo Parameters. This field is display only and cannot be maintained.

Urgent

If the Memo has been flagged as an Urgent Memo then a Tick will appear in this field against the Memo that has been defined as an Urgent Memo.

Cross App.

If the Memo has been flagged as a Cross Application Memo then a Tick will appear in this field against the Memo that has been defined as being able to be displayed Across Applications.

Search Profile – Group

Enter a Memo Group on which to base your search and use the Search Button to initiate the search. Wildcard searching is available on this field.

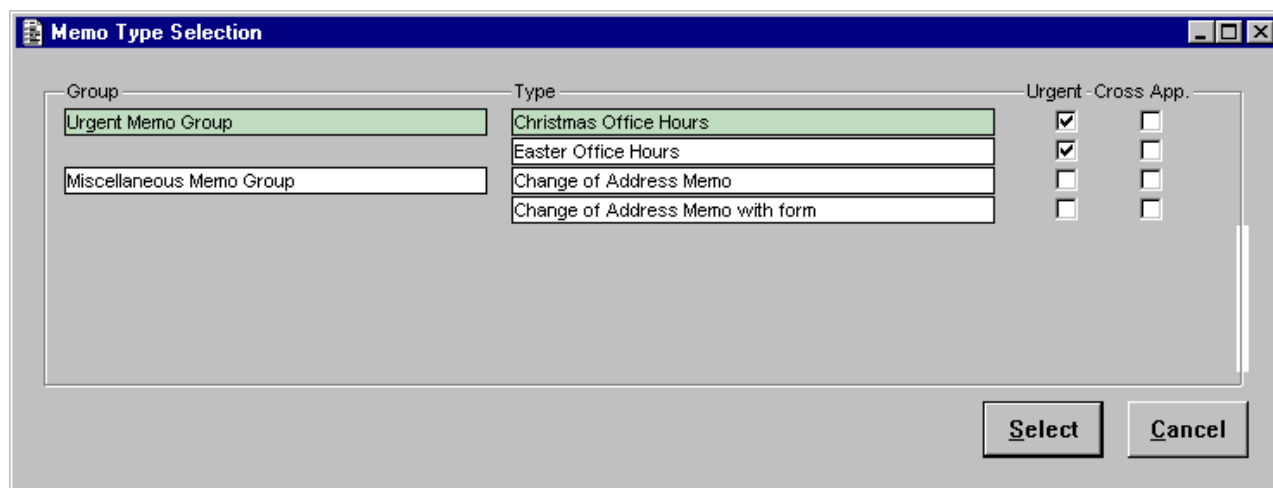
Search Profile – Type

Enter a Memo Type on which to base your search and use the Search Button to initiate the search. Wildcard searching is available on this field.

Memo Type Selection Form

This form enables the selection of a particular Memo Type, within a Memo Group for the purpose of adding or moving memos.

This form is accessed from the Memo Selection form when selecting the New or Move buttons.



The image shows a screenshot of a software window titled "Memo Type Selection". It contains three columns: "Group", "Type", and "Urgent - Cross App.". Under "Group", there are two entries: "Urgent Memo Group" (highlighted in green) and "Miscellaneous Memo Group". Under "Type", there are four entries: "Christmas Office Hours" (highlighted in green), "Easter Office Hours", "Change of Address Memo", and "Change of Address Memo with form". The "Urgent - Cross App." column has two columns of checkboxes. The first column has checkboxes checked for "Christmas Office Hours" and "Easter Office Hours", and unchecked for the others. The second column has all checkboxes unchecked. At the bottom right, there are "Select" and "Cancel" buttons.

Group	Type	Urgent	Cross App.
Urgent Memo Group	Christmas Office Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Easter Office Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Miscellaneous Memo Group	Change of Address Memo	<input type="checkbox"/>	<input type="checkbox"/>
	Change of Address Memo with form	<input type="checkbox"/>	<input type="checkbox"/>

Memo Type Selection Form

Group

This field contains a list of Memo Groups. The Memo Groups are for display purposes only, to add or move a memo, select the required Memo Type.

The Memo Groups are display only and may not be maintained.

Type

This field contains a list of all Memo Types within Memo Groups.

The Memo Types are display only and may not be maintained.

Urgent

If this box is checked on, it indicates that the associated Memo Type is for Urgent memos. Therefore any memos linked to this Memo Type will be urgent. The Urgent memo selection form will always display first when an urgent memo exists on a record.

This field is display only and may not be maintained.

Cross Application

If this box is checked on, the Memo Type is defined as Cross Application. All memos created under the Cross Application Memo Type can be accessed from applications other than the one from which they were created. This Cross Application option relates specifically to Property and Name and Address memos.

For example

A memo created against a particular name in the Name and Address Register, if cross application will be able to be accessed wherever that name is linked (Property Maintenance, Applications Maintenance etc).

This field is display only and may not be maintained.

Memo Maintenance Form

This form enables memo details to be created, maintained or deleted. Attachments may be included on a memo using the available Data Types (Word processing, Spreadsheet, Video etc).

Memo Maintenance Form

Application/Group/Type

This field displays the Application Name, Memo Group and Memo Type descriptions.

This field is display only and may not be maintained.

Precis

This field contains a summary of the memo. The precis text will appear on all memo selection screens. There are 50 alphanumeric characters available for the entry of Precis details

This field is mandatory.

Urgent

The Urgent Flag is defaulted from the particular Memo Type. However it is possible to vary the urgency of a particular Memo by changing the value in this field.

Details

This field contains the detailed memo text. Standard Windows editing facilities are available on this field.

Ctrl C - Copy text

Ctrl X - Cut text

Ctrl V - Paste text

This enables text to be copied from the Precis to Detail field if required.

Effective From

This field will default to the current date. If required, this date may be overridden.

Urgent Memos with an Effective From date greater than today's date will not be displayed on the Urgent Memo Selection Form.

Effective To

This field will default based on the Effective For Period defined in the Memo Type Parameters.

For example:

Current Date 27th May 1997
Effective for 1 month
Effective To 27th June 1997

The Effective To Date can be used to tailor the reporting and purge functions to enable certain memo records to be selected.

Urgent Memos with an Effective To date less than today's date will not be displayed on the Urgent Memo Selection form.

Termination Date

This field will default based on the Terminate Period defined in the Memo Type Parameters.

For example
Current Date 27th May 1997
Terminate to 1 Year
Termination Date 27th May 1998

The Termination Date can be used to tailor the reporting and purge functions to enable certain memo records to be selected.

Created by User

The Created by User field displays the User who created the Memo record. The Date and Time the Memo was added is also displayed. Upon adding a Memo this field is blank. It is only once a memo has been created and you access the Memo that the information is displayed in this field.

Modified by User

The Modified by User field displays the User who has changed the Memo record. The Date and Time the Memo was changed is also displayed. Upon adding and changing the Memo, this field is blank. It is only once a memo has been changed and you access the Memo again that the information is displayed in this field.

Scope

This field determines the scope of the particular memo. Two options are available via the "radio" buttons. Only one option may be selected.

- ☐ Record
- ☐ Application

Record scope will apply the memo only to the particular application record being maintained (i.e. particular name record)

Application scope will apply the memo to ALL records within the nominated application. (i.e. all name records).

Data Type

The Data Type field enables attachments to be linked to a basic text memo. Six options are available from the pop-up list. Data Types that are flagged as "inactive" at the system level will not be displayed.

- ☐ LOTUS Spreadsheet
- ☐ EXCEL Spreadsheet
- ☐ Sound
- ☐ Video
- ☐ Images
- ☐ Word Processing

A default Data type may be linked to a particular Memo Type. Any new memos added which are linked to this type will have the Data Type defaulted.

The Data Type (if defaulted from the Memo Type) may be changed if not applicable to this individual memo.

Once a Data Type has been nominated for a memo and saved it may not be changed.

Source

This field is only displayed where a Data type is established at the Memo Type level. These options are available from the drop down list.

- ☐ New Document
- ☐ Link to Type
- ☐ Copy from Type

New Document - If this option is taken the system will create a new empty document (or spreadsheet). Text or data may be entered and saved.

Link to Type - If this option is taken the system will automatically link this memo record to a document which was created at the Memo Type level. You may view the document (or spreadsheet) from the memo record but will not be able to maintain or save it.

Copy from Type - If this option is taken the system will copy the document (or spreadsheet) which was created at the Memo Type level and store it as a new document against the memo record. It may then be maintained and saved.

Description

This field contains the description of the Data Type.

This field is display only and may not be maintained.

Detail Button

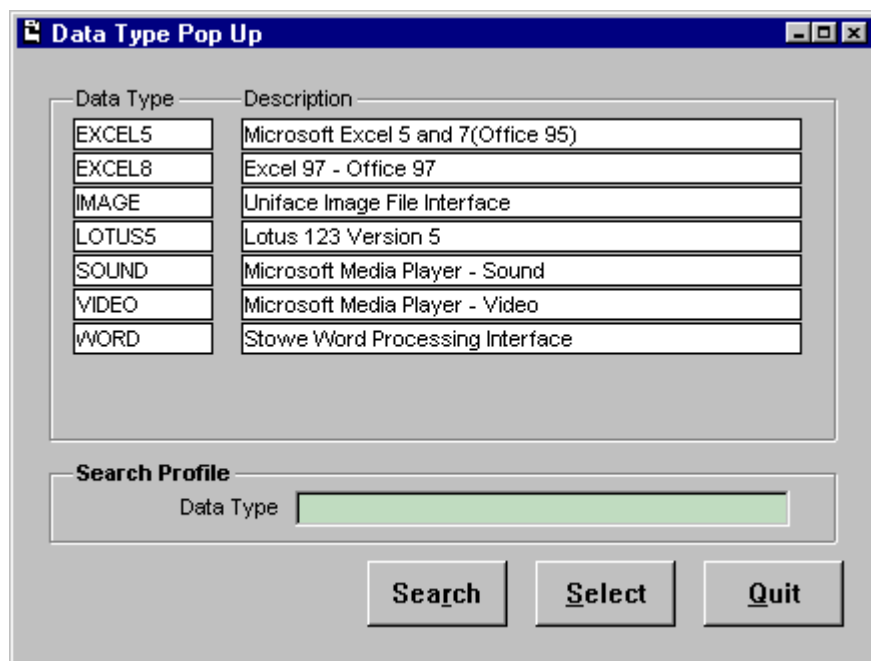
By selecting the Detail button, further details for the related Data Type will be displayed.

- ☐ If the Data Type is Word Processing then this button will initiate the appropriate Word Processor.
- ☐ If the Data Type is EXCEL then this button will initiate the EXCEL Spreadsheet program.
- ☐ If the Data Type is LOTUS then this button will initiate the LOTUS 123 Spreadsheet program.
- ☐ If the Data Type is IMAGE, SOUND or VIDEO then this button will initiate the Image/Sound/Video Memo Maintenance form. When creating a memo an Open Dialog box will be presented initially to select the associated file name e.g. a bitmap file, a sound file or a video file.

Data Type Pop Up Form

This form is presented when the pop up button is selected on the Data Type field.

Select a valid Data Type from this form on which to base your memo.



The 'Data Type Pop Up' dialog box contains a table with two columns: 'Data Type' and 'Description'. The table lists several data types and their corresponding descriptions. Below the table is a 'Search Profile' section with a text input field labeled 'Data Type'. At the bottom of the dialog are three buttons: 'Search', 'Select', and 'Quit'.

Data Type	Description
EXCEL5	Microsoft Excel 5 and 7 (Office 95)
EXCEL8	Excel 97 - Office 97
IMAGE	Uniface Image File Interface
LOTUS5	Lotus 123 Version 5
SOUND	Microsoft Media Player - Sound
VIDEO	Microsoft Media Player - Video
WORD	Stowe Word Processing Interface

Search Profile

Data Type

Search **Select** **Quit**

Data Type Pop Up Form

Data Type

This field contains the code associated with the Data Type.

This field is display only and may not be maintained.

Description

This field contains the full description of the Data Type.

This field is display only and may not be maintained.

Search Profile Data Type

Enter a Data Type code (or part of) on which to base your Search. Advanced Profile techniques may be used in this field (e.g. Wild Cards)


Image/Sound/Video Memo Maintenance Form

This form is presented whenever a memo has been designated as an Image, Sound or Video Data Type and the detail button is pressed on the Memo Maintenance Form.

When creating a memo an Open Dialog box will be presented initially to select the associated file name e.g. a bitmap file, a sound file or a video file.

To change a file name press the Load Button. You will be presented with the Open Dialog box to select a new file name.

To "play" a file of a Data Type of SOUND or VIDEO press the Play Button.

 If the image file is deleted from the system network (using File Manager or similar network tool) then any memos associated with that file will not display the image.

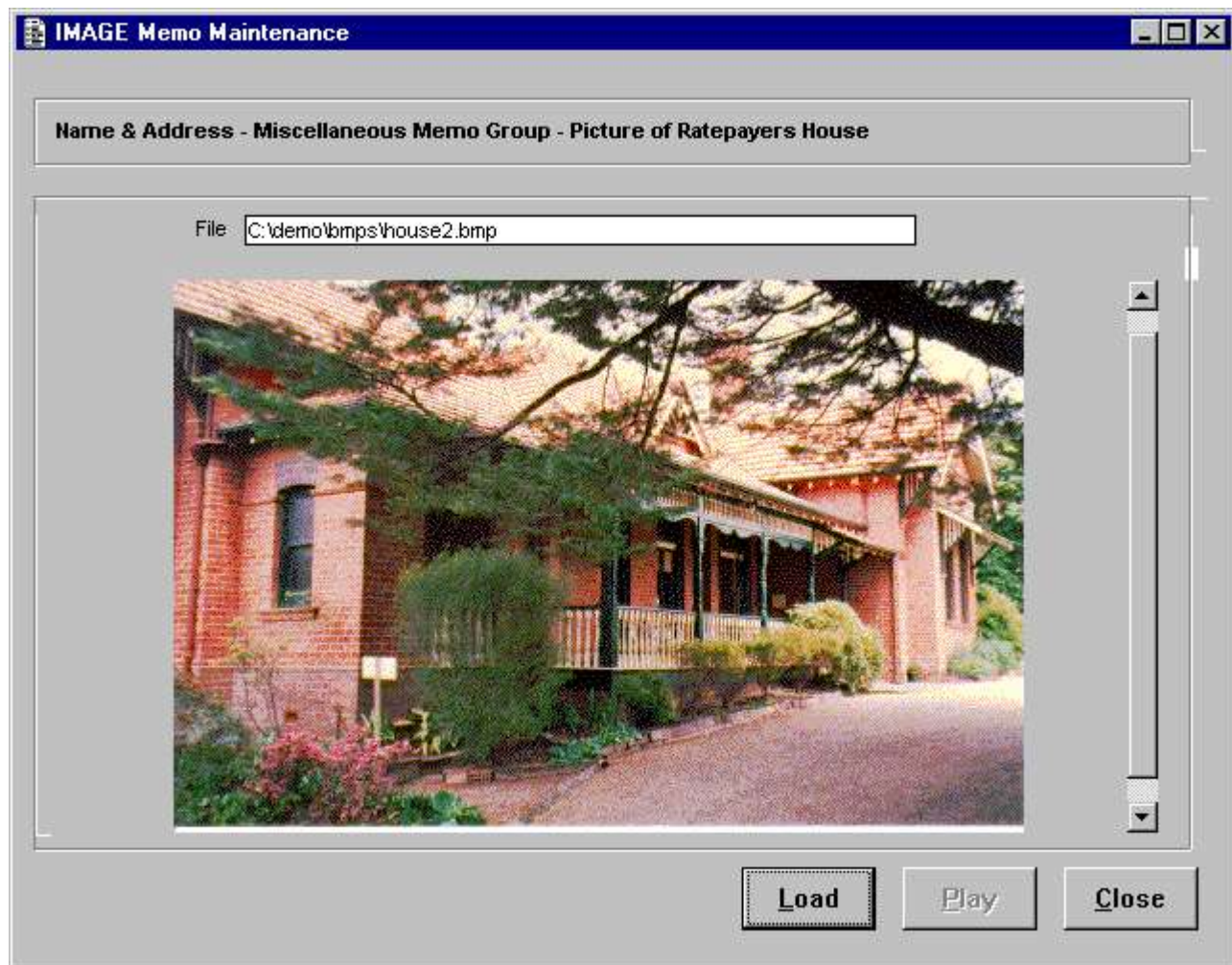


Image Memo Maintenance Form

Application/Group/Type

This field displays the Application Name, Memo Group and Memo Type descriptions.

This field is display only and may not be maintained.

File

This field displays the full file name of the associated file.

In the form example the file name is that of the bitmap file displayed.

This field is display only and may not be maintained.

Picture

This field will display the bitmap that has been associated with the memo.

This field is display only and may not be maintained.

Load Button

This button is used to link the memo to another file.

For example

If a bitmap file has been associated to the memo and you wish to associate to another bitmap then pressing this button will present you with an Open Dialog box. Select the bitmap file you wish to associate and press Open.

Play Button

This button is only accessible if the Data Type for the memo is either VIDEO or SOUND.

When pressed, this button will play the associated video or sound file.

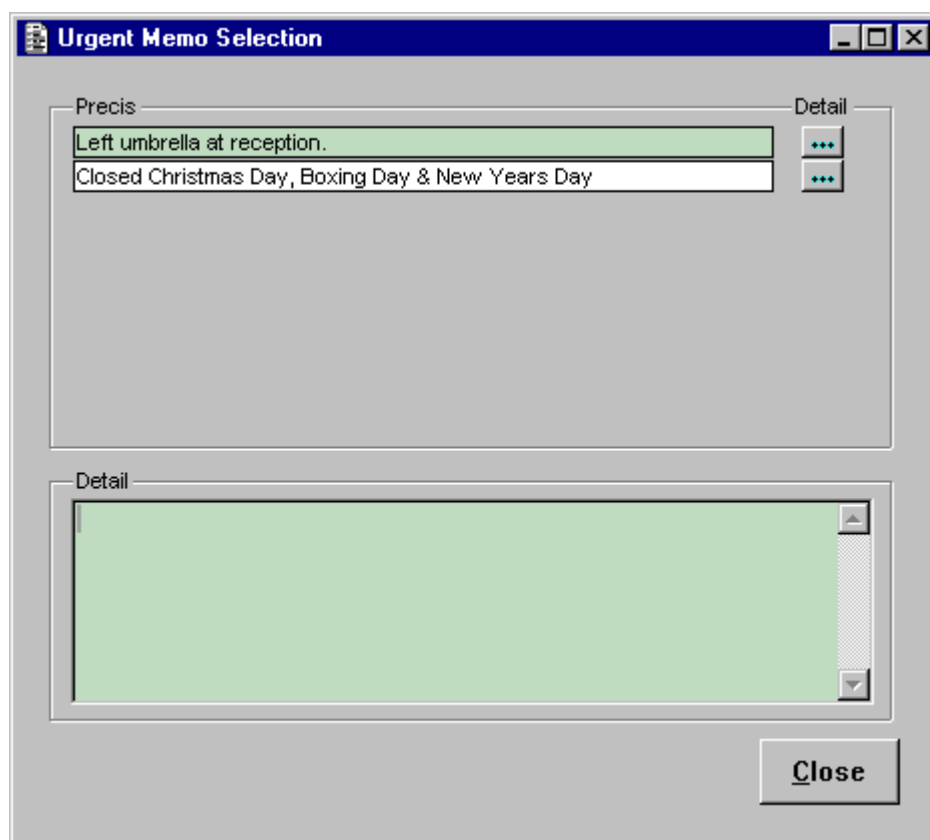
Urgent Memo Selection Form

This form displays all Memo which have been created under an Urgent Memo Type. The Urgent Memo Selection form will always display first when an urgent memo exists on an application record.

Urgent memos will only display if they meet the effective from and to date criteria. For example:-

- ☐ If today's date is less than the "Effective from" date, then the urgent memo will not be displayed.
- ☐ If today's date is greater than the "Effective to" date, then the urgent memo will not be displayed.

The detail button alongside the memo may be pressed to allow access to Memo Maintenance.



Urgent Memo Selection Form

Precis

This field displays the Urgent Memo precis.

This field is display only and may not be maintained.

Detail Button

By pressing this button, the Memo Maintenance form may be accessed for the selected Urgent Memo. This enables further text and attached details for the memo to be viewed or maintained.

Detail

This field contains further text details for the listed Memos. Selecting the required memo record will display the detail text available.

This field is display only and may not be maintained.

Property Search

Memos can be searched for from within Property Maintenance, from the Address Search Profile form.

Memo Search Profile Form

NOTE: For a search to work correctly, at least one Memo Group/Type must be highlighted in blue, otherwise if Search is clicked without highlighting anything, no results will be returned.

If all Memo Groups and Types are to be considered for the Search you will have to highlight all records displayed. This can be done by holding the Shift or Control Key while clicking the Memo Groups and Types required.

Memo Search Profile Form

Application

This field will display the application currently being used, in this case Property. This field is not maintainable.

Date Range

Enter a Date Range on which to base a search. When a Date Range is used, the Based On option will also be considered, so this field may require changing to suit your requirements.

Based On

Make a selection from the dropdown if your search is to be based on a date range. There are 3 options to choose from:

- Effective From Date
- Effective To Date
- Termination Date

The default is Effective From Date.

Group

This field displays the Memo Group as entered in the Parameters. This field is not maintainable.

Type

This field displays the Memo Types attached to each Memo Group as entered in the Parameters. This field is not maintainable.

Property Selection Form

This form is displayed when searching for Memo Groups and Types from the Address Search Profile form within Property Maintenance or Enquiry Modes.

Memo Details		Property Details	
Address/Customer Information : Urg	Please do not modify this address	3-4A Flame Tree Circuit, EASTWOOD SA 5063	
Address/Customer Information : Urg	Main access via lane at rear	996 52nd Streete, EASTWOOD SA 5063	
Address/Customer Information : Urg	Change of address details required	1 Alexandra Avenue, EASTWOOD SA 5063	
Address/Customer Information : Urg	8/1 AARDVARK ALLEY, EASTWOC	8, 1 Aardvark Alley, EASTWOOD SA 5063	
Address/Customer Information : Urg	Urgent change of country	1, Frogg palace, 1 Aardvark Alley, EASTWOOD SA ...	
Address/Customer Information : Urg	ttt	Unit 1A, Level 2, Aardvark Apartments, 12345 A...	
Address/Customer Information : Urg	Urgent Address	33 Supreme Way, PARKVILLE VIC.	
Address/Customer Information : Urg	memo on property	10 Main Streete, SPRINGFIELD DECAY	
Address/Customer Information : Urg	test	145-155 Cherrywood Drive, EASTWOOD SA 5063	

Memo Summary	Property Summary
Memo Type : ADDR1 - Urgent Address Details Memo Groups : A3 - Address/Customer Information Precis : Please do not modify this address Effective From : 17-Oct-1997 Effective To : 24-Oct-1997 Termination Date : 24-Oct-1997 Detail : Do not modify the address details of this property without	3-4A Flame Tree Circuit, EASTWOOD SA 5063 (Base, Occupancy, Land) Type: Standard Property Type Desc Inv Own Noms: Mr Nigel Spencer Zone Type(s): 1B - Non Urban 1(b) 2B2 - Residential 2B

Property Selection Form

Memo Details

This field displays the Memo Details. This field is not maintainable.

Property Details

This field displays the Property Details. This field is not maintainable.

Memo Summary

This Summary Panel displays Memo information relating to the record highlighted in the top portion of the form. This information is not maintainable.

Property Summary

This Summary Panel displays Property information relating to the record highlighted in the top portion of the form. This information is not maintainable.

Reporting

The following topic is covered in this section:

[Memo Reporting](#)

Memo Reporting

The Memo Reporting Option allows the User to select from a Specific Module of the Pathway System such as Name and Address or Applications. Once a Module has been selected one or more of the Memo Groups belonging to that module can be selected for Reporting on.

Memo Reporting Control Form

Memo Purge Control

Application: **Animals** >>

Date Range: [] to [] Based on: **Effective From Date** ▾

Group

- Bird Memo Group
- Dog Memo Group
- Impoundments

Type

- Birds reported lost
- Urgent bird information
- Excel 8 memo
- Wandering Street
- Brought in by person

Processing Options

☒ Report Only ☐ Update and Report

Query Result

Description: [] >>

Options Process Cancel

Memo Reporting Control Form

Reporting - Application

This field details the particular Module of the Pathway System selected for Reporting.

Reporting - Application Pop Up

The User may select this Pop Up Button to choose from the predefined list of Modules available.

Reporting - Class Pop Up

If the Application that is selected has Classes associated to it then the Class field and its Pop Up are displayed to further define the selection by a Class if required.

Reporting - Date Range

The Date Range fields are based upon a To and From date. The User should enter a To and From Date Range that is required for the selection of Memos to be Reported on.

Reporting - Based On

This field consists of two choices, the first being an Effective From Date the Second being the Termination Date.

If the Effective From Date is selected, Memos in the specific date range that are Effective From the first date will be included in the Report.

If the Termination Date Range is chosen, then the Reports will include Memos that are based on a Termination Date of the Memos selected.

Reporting - Group/Type

The form will list the particular Groups of Memos that have been created for the particular Module selected. Against each Group will be the associated Types.

These two fields are multi selectable, meaning that one or more Groups and one or more Types may be selected to include in the Report.

Reporting - Query Result - Description

The Query Result Field allows the user to enter a Predefined Query that may have been created to select specific Groups or Types of Memos to be reported on. The User may enter the name of the Query if know, or select the Pop Up Button to choose from the previously created Queries. Once selected, then the Processing may begin.

The Process button allows the User to proceed with the running of the Report. The Options button allows the User to select from predefined Reporting Types or see previously printed Reports.

Both the Processing Button and Options Buttons are fully described in the Batch Processing Manual.

Housekeeping

The following topic is covered in this section:

[Memo Purge](#)

Memo Purge

The Purge Function allows the bulk deletion of memo records according to criteria entered.

You may select only certain types or all types in nominated groups to be purged. In addition, date ranges are nominated for the purge process to limit the purge to memos falling within that date range.

This process will permanently delete memo records from the database. It is advisable to take a backup of your system prior to running this function. Any documents (i.e. spreadsheets and word processing) attached to memos that are purged will also be deleted.

Memo Purge Control Form

This form is used to select the memo types and a date range on which to base the purge process.

When the process is started any memos that match the selection criteria entered here will be deleted. Pressing OK will start the process. Pressing Cancel will return you to the Application Selection form and not process any records.

The batch processor forms will be displayed to enable the passing of the purge process to a job queue. This enables the job to be scheduled for execution.

This form is a “multi-select” form.

Memo Purge Control

Application: **Animals** >>

Date Range: [] to []

Based on: **Effective From Date** ▾

Group	Type
Bird Memo Group	Birds reported lost
	Urgent bird information
Dog Memo Group	Excel 8 memo
Impoundments	Wandering Street
	Brought in by person

Processing Options

☒ Report Only ☐ Update and Report

Query Result

Description: [] >>

Options Process Cancel

Memo Purge Form

Memo Purge - Application

An application name may be selected to restrict the purge to an individual application e.g. Rates memos only.

By selecting a valid application name from the Pop Up form only Memo Groups and Types for that application will be displayed for selection.

This field is optional. If left blank then all Memo Groups and Types will be displayed for selection.

Memo Purge - Date Range - From

Enter the date from which you wish to start the purge process. This field represents either the start Termination Date or the start Effective To Date depending on how the Based On field is set.

The date entered here must be less than the "To Date".

This field is mandatory.

This field works in combination with the "To Date" field and the "Based On" field.

Memo Purge - Date Range - To

Enter the date to which you wish to end the purge process. This field represents either the end Termination Date or the end Effective To Date depending on how the Based On field is set.

The date entered here must be greater than the "From Date"

This field is mandatory.

This field works in combination with the "From Date" field and the "Based On" field.

Memo Types selected for deletion that have either a "Termination Date" or an "Effective To Date" that falls within, or is equal to the date range entered will be purged.

Memo Types selected for deletion that have either a "Termination Date" or an "Effective To Date" that falls outside the date range entered will not be processed.

Memo Purge - Based On

You must nominate whether the date range entered is based upon either the Termination Date of the memos or the Effective To Date of the memos.

If the Termination Date is chosen then memos with a termination date that falls within, or is equal to the date range entered will be deleted.

If the Effective To Date is chosen then memos with an effective date that falls within, or is equal to the date range entered will be deleted.

Memo Purge - Group & Type

This field displays the Memo Groups and Types that are available for purging.

Groups and Types displayed here are dependent on the application selected in the Application field.

If an application name is entered in the Application field then only Groups and Types belonging to that application are displayed.

If no application name is entered then all Groups and Types are displayed.

To select Memo Types for deletion the standard "multi-select" feature must be used. Refer to the "How to Use" User Guide for more information on "multi-select".

Memo Purge - Processing Options

The options available are:

- Report Only
- Update and Report

Select Report Only to generate a report without updating the database.

Select Update and Report to generate a report as well as updating the database.

Memo Purge - Query Result - Description

The purging of memos may also be determined by the result of a query previously executed via the Query function.

Press the Pop Up button to select the result set that you wish to process.

If the Query Result field is used the purge process will only affect those records held within the query result.