

# **References User Guide**



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

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# Overview

The References system provides the means by which additional, user defined references can be added to records within an application to assist with data retrieval.

The references can be defined as;

Sharing One – only one record in the application can have the same information in the reference field

**Or**

Sharing Many – many records in the application can have the same information in the reference field.

The ability to add references to an individual record is available via each of the main Land Information applications.

Additionally, References can be loaded via a File against the relevant Pathway Records.

# Parameters

The following topics are covered in this chapter:

[Reference Types](#)

[Reference Role Type Filter](#)

[Application & Class Maintenance](#)

[Reference Extract Filter](#)



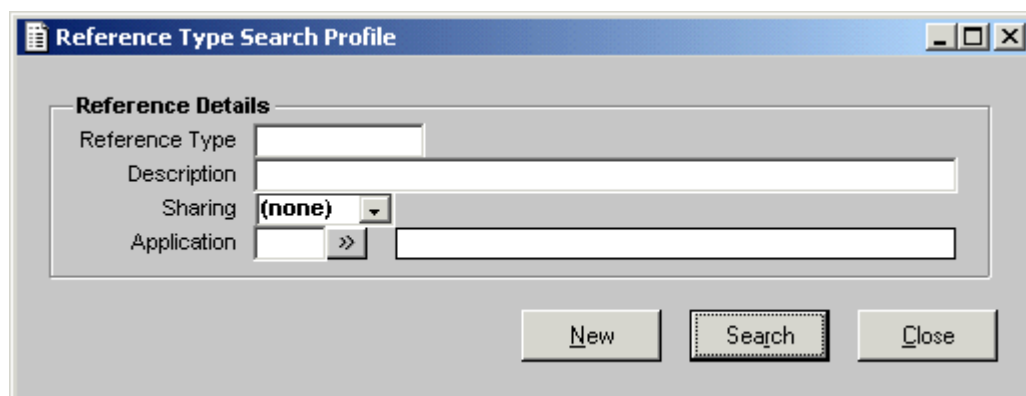
## Reference Types

This section enables Reference Type parameters to be defined. Reference Types are recorded against various entities (Properties, Applications etc) and enable an additional access path to that entity.

### Reference Type Search Profile Form

This form enables Reference Types to be selected based on various search criteria. Where more than one Reference matches the search criteria, the Reference Selection form will be displayed otherwise the selected Reference will be displayed to allow enquiry or maintenance.

One or many of the search criteria may be used to identify the required reference parameter record.

The image shows a software window titled "Reference Type Search Profile". Inside the window, there is a section labeled "Reference Details" which contains four input fields: "Reference Type" (a text box), "Description" (a text box), "Sharing" (a drop-down menu currently showing "(none)"), and "Application" (a text box with a ">>" button next to it). Below these fields are three buttons: "New", "Search", and "Close".

*Reference Type Search Profile Form*

#### Reference Type

This field enables a search to be performed on a specific Reference Type code. Wild card searching is available on this field.

#### Description

This field enables a search to be performed on a Reference Type description. Wild card searching is available on this field.

#### Sharing

This field enables a search to be performed based on the Sharing option of a Reference. Three options are available from the drop-down list.

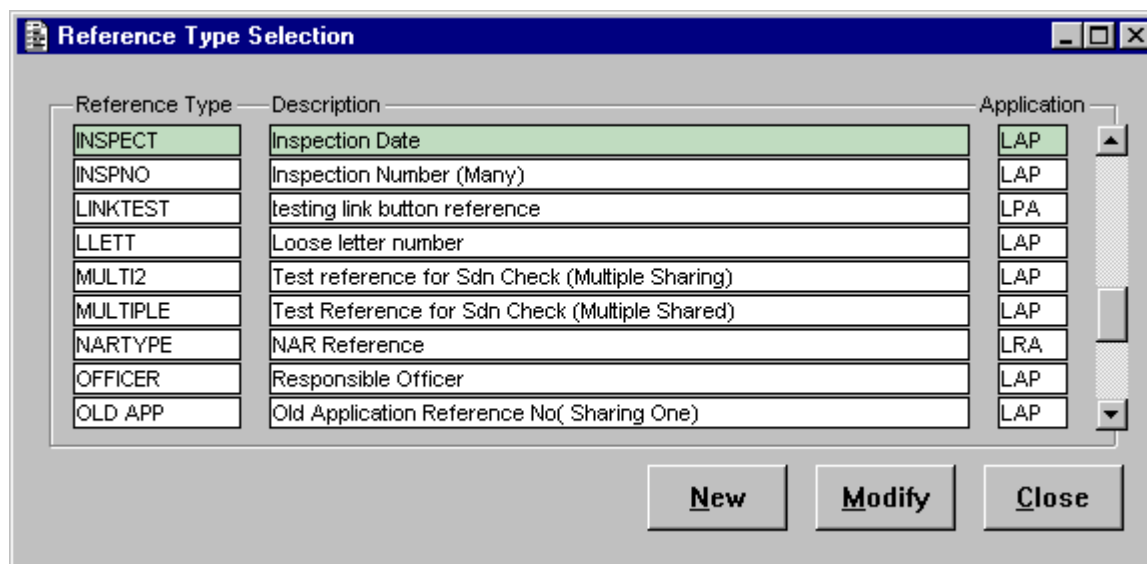
- One
- Many
- None

#### Application

This field enables a search to be performed based on Reference Types for a particular application code. The pop-up button can be used to access a list of available application codes. The Applications are system definable and cannot be maintained. When an application code is selected, the related description of this application will also be extracted.

### Reference Type Selection Form

This form displays a list of Reference Types, which match the previously entered search criteria. References may be selected from this list for further enquiry or modification.



The image shows a software window titled "Reference Type Selection". It contains a table with three columns: "Reference Type", "Description", and "Application". The table lists several reference types and their corresponding descriptions and application codes. At the bottom of the window are three buttons: "New", "Modify", and "Close".

Reference Type	Description	Application
INSPECT	Inspection Date	LAP
INSPNO	Inspection Number (Many)	LAP
LINKTEST	testing link button reference	LPA
LLETT	Loose letter number	LAP
MULTI2	Test reference for Sdn Check (Multiple Sharing)	LAP
MULTIPLE	Test Reference for Sdn Check (Multiple Shared)	LAP
NARTYPE	NAR Reference	LRA
OFFICER	Responsible Officer	LAP
OLD APP	Old Application Reference No( Sharing One)	LAP

*Reference Type Selection Form*

### Reference Type

This field displays the Reference Type code for each application. No modification or deletion of this field is allowed. Reference Types may be selected from this form for further enquiry or modification.

### Description

This field displays a further description of each Reference Type code. No modification or deletion of this field is allowed. Reference Types may be selected from this form for further enquiry or modification.

### Application

This field displays the Application Code (abbreviation) that Reference Type applies to. No modification or deletion of this field is allowed. Reference Types may be selected from this form for further enquiry or modification.

## Reference Type Maintenance Form

This form enables various details relating to individual Reference Types to be maintained.

The screenshot shows the 'Reference Type Maintenance' window. It contains the following fields and controls:

- Reference Type:** A text box containing '10'.
- Description:** A text box containing 'type 10'.
- Application:** A text box containing 'LAP' and a 'Pop Up' button to its right.
- Sharing:** Two radio buttons, 'Many' (unselected) and 'One' (selected).
- Active:** A checked checkbox.
- Sequence:** A text box containing '...'.
- Valid Classes:** A list box containing 'PC Building Application - TA'.
- Sequence:** A text box containing '...'.
- Buttons:** 'Insert', 'OK', and 'Cancel' at the bottom.

*Reference Type Maintenance Form*

### Reference Type

This field contains the Reference Type Code. An alphanumeric code of up to 10 characters may be entered.

### Description

This field contains the Reference Description. This description will further clarify the use of the Reference Type.

### Application

This field contains the Application Code to which the Reference Type applies. The Pop Up button can be used to select from a list of Application Codes. The description of the selected Application Code will display alongside the selected Application Code. All Reference Types must be linked to a specific Application.

### Sharing

This field can either be set to "Many" or "One". Setting it to "Many" means that once a reference record is created for the Reference Type, it is able to be linked to another Reference from another property record, assessment record etc.

Setting the field value to 'One' means that the reference record is unable to be linked to another reference record.

### Active

If this box is checked on, the Reference Type is available for selection within Reference Maintenance. Reference Types which are made inactive after they have been linked can still be viewed via the relevant application, but no new records can be added using the Reference Type.

### Mandatory

If this flag is checked on, entry of this Reference Type is mandatory against the Application.

### Sequence

The Sequence Option is available to sequence the Reference Types in the required sequence for use within the Module. Selecting this option will display all the References associated to the Module in the sequence that they are currently in.

Note that new References are added to the end of the list and will need to be re sequenced if this is not the required position of the Reference.

### Valid Classes

This field relates to Application related references only (i.e. Reference Types that have an Application code of LAP, LLC or LIF). A list of valid Classes for the Application system may be accessed using the Pop Up button. If a Reference is related to a particular Application Class Code, this tailors the use of the Reference Type within the Applications system to only Applications with that Type.

### Sequence

The Sequence Option is available to sequence the Reference Types in the required sequence for use within the Module. Selecting this option will display all the References associated to the Class in the sequence that they are currently in.

Note that new References are added to the end of the list and will need to be re sequenced if this is not the required position of the Reference.

## Application Pop Up Form

This form assists in the selection of an Application Code, which is linked to a Reference Type. The Application details on this form are system defined and cannot be maintained.

Application	
LAP	Application
LIF	Infringement
LPA	Property Administration
LRA	Rates Accounting
LVL	Valuation

**Search Profile**

Application

*Application Pop Up Form*

### Application

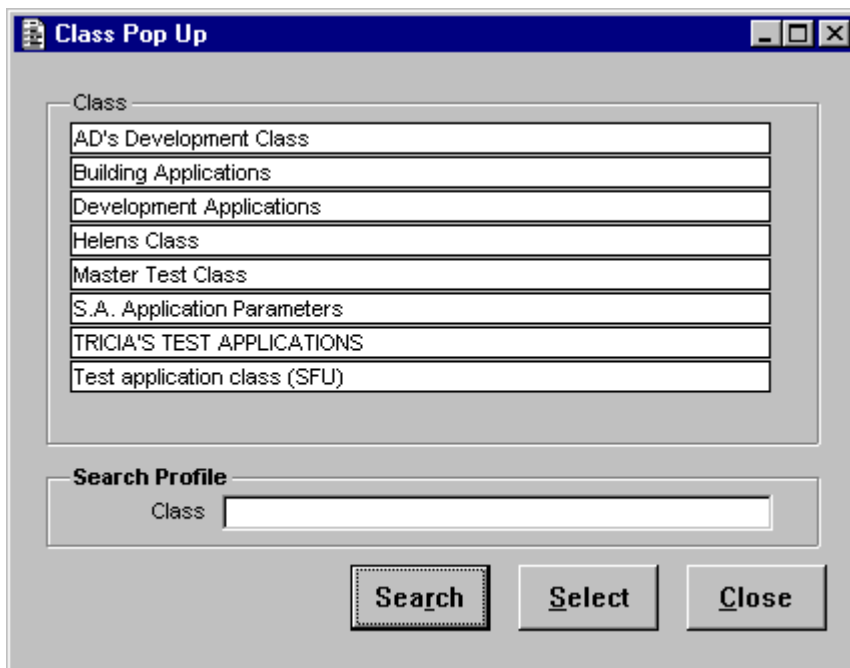
This field contains a list of available Application Codes (abbreviated Application Code and full Application Description). These Applications may be linked to the Reference Type being created or maintained.

### Search Profile - Application

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

## Class Pop Up Form

This form assists in the selection of a valid Class, which can be linked to Application related Reference Types.

A screenshot of a 'Class Pop Up' dialog box. The title bar is blue with the text 'Class Pop Up' and standard window control buttons. The main area is divided into two sections. The top section, labeled 'Class', contains a list box with eight entries: 'AD's Development Class', 'Building Applications', 'Development Applications', 'Helens Class', 'Master Test Class', 'S.A. Application Parameters', 'TRICIA'S TEST APPLICATIONS', and 'Test application class (SFU)'. The bottom section, labeled 'Search Profile', contains a text input field with the placeholder text 'Class'. Below the input field are three buttons: 'Search', 'Select', and 'Close'.

*Class Pop Up Form*

**Class**

This field contains a list of valid Classes from within the Application system. These Classes may be linked to the Reference Type being created or maintained.

**Search Profile - Class**

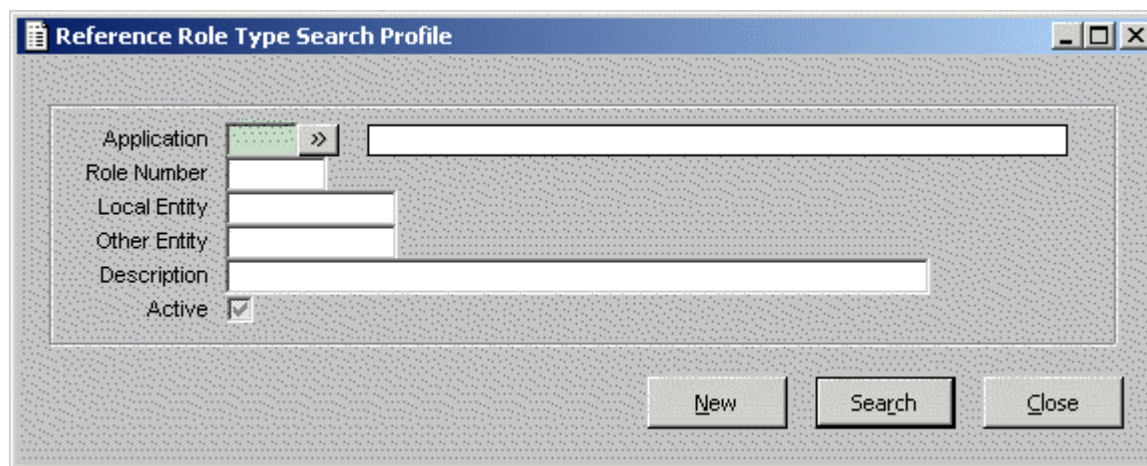
Enter a Class on which to base your search and use the Search button to initiate the search. Wild card searching is available on this field.

## Reference Role Type Filter

This section refers to the System Parameters defined at the System Level for References. The information in this menu should not be maintained by the User. For further information please contact Infor.

### Reference Role Type Search Profile Form

This form enables the searching of Reference Role Types. The information in this menu should not be maintained by the User. For further information please contact Infor.

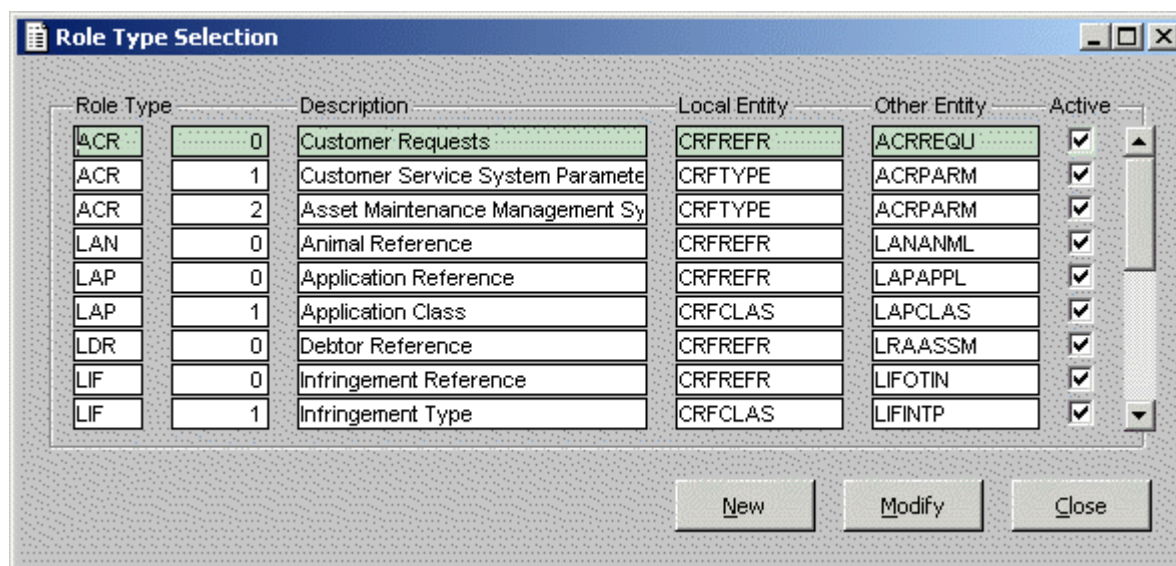


The screenshot shows a window titled "Reference Role Type Search Profile". It contains several input fields: "Application" with a dropdown arrow, "Role Number", "Local Entity", "Other Entity", and "Description". There is also an "Active" checkbox which is checked. At the bottom right, there are three buttons: "New", "Search", and "Close".

Reference Role Type Search Profile Form

### Role Type Selection Form

This form enables the searching of Reference Role Types. The information in this menu should not be maintained by the User. For further information please contact Infor.



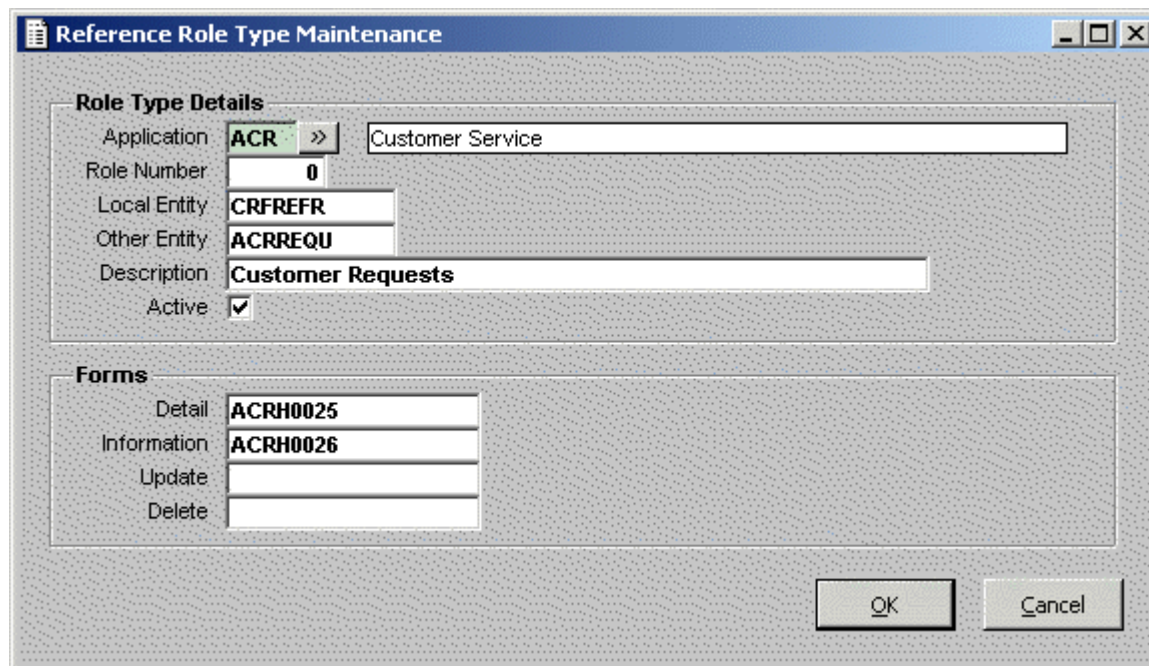
The screenshot shows a window titled "Role Type Selection". It contains a table with the following columns: Role Type, Description, Local Entity, Other Entity, and Active. The table lists various role types and their associated entities. At the bottom right, there are three buttons: "New", "Modify", and "Close".

Role Type	Description	Local Entity	Other Entity	Active	
ACR	0	Customer Requests	CRFREFR	ACRREQU	<input checked="" type="checkbox"/>
ACR	1	Customer Service System Paramete	CRFTYPE	ACRPARM	<input checked="" type="checkbox"/>
ACR	2	Asset Maintenance Management Sy	CRFTYPE	ACRPARM	<input checked="" type="checkbox"/>
LAN	0	Animal Reference	CRFREFR	LANANML	<input checked="" type="checkbox"/>
LAP	0	Application Reference	CRFREFR	LAPAPPL	<input checked="" type="checkbox"/>
LAP	1	Application Class	CRFCLAS	LAPCLAS	<input checked="" type="checkbox"/>
LDR	0	Debtor Reference	CRFREFR	LRAASSM	<input checked="" type="checkbox"/>
LIF	0	Infringement Reference	CRFREFR	LIFOTIN	<input checked="" type="checkbox"/>
LIF	1	Infringement Type	CRFCLAS	LIFINTP	<input checked="" type="checkbox"/>

Role Type Selection Form

## Reference Role Type Maintenance Form

This form enables the searching of Reference Role Types. The information in this menu should not be maintained by the User. For further information please contact Infor.



The screenshot shows a Windows-style application window titled "Reference Role Type Maintenance". It contains two main sections: "Role Type Details" and "Forms".

**Role Type Details:**

- Application: ACR >> Customer Service
- Role Number: 0
- Local Entity: CRFREFR
- Other Entity: ACRREQU
- Description: Customer Requests
- Active: ☒

**Forms:**

- Detail: ACRH0025
- Information: ACRH0026
- Update:
- Delete:

At the bottom right, there are "OK" and "Cancel" buttons.

*Reference Role Type Maintenance Form*

## Assign Reference Maintenance

This form, which is selected at the Application Type Maintenance Parameter allows for the addition of one or more references to be loaded at the application lodgement process.

Select from the list of available references and move them to the right hand side to assign them.

*Application Reference Maintenance form*

#### **Application Reference – Class Details**

This is the description of the Class of Applications selected.

#### **Application Reference – Application Type Details**

This is the Description of the Application Type selected.

#### **Application Reference – Available References**

This is a list of references that are available for selection for this Application Type.

#### **Application Reference – Assigned References**

References moved to the Assigned side of the form will be added to the application during the lodgement process.



## Application & Class Maintenance

The information in this menu should not be maintained by the User. For further information please contact Infor.

### Application Maintenance Form

The information in this menu should not be maintained by the User. For further information please contact Infor.

Application	Name	Uses	Classes	Active
ACR >> Customer Service	ACRREQU	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...
LAN >> Animal Control	LANANML	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...
LAP >> Application	LAPAPPL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...
LDR >> Debtors	LRAASSH	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...
LIF >> Infringement	LIFINTP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...
LLC >> Licensing	LAPAPNO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...
LPA >> Property Administration	LPAPROP	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...
LRA >> Rates Accounting	LRAASSM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...
LTW >> Trade Waste	LTWASSM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	...

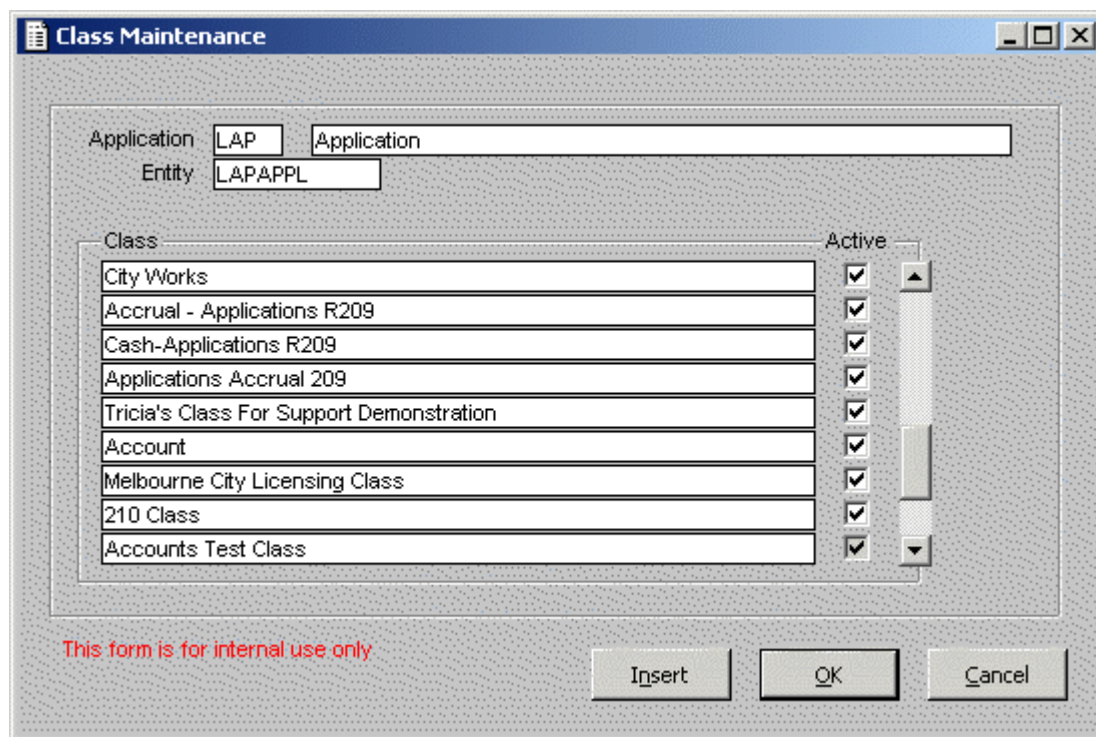
This form is for internal use only

Insert OK Cancel

*Application Maintenance Form*

### Class Maintenance Form

The information in this menu should not be maintained by the User. For further information please contact Infor.



The **Class Maintenance** dialog box is used for managing application classes. It features a title bar with standard window controls. The main area contains input fields for 'Application' (set to 'LAP') and 'Entity' (set to 'LAPAPPL'). Below these is a table with two columns: 'Class' and 'Active'. The table lists ten classes, all of which are currently active (checked). At the bottom left, a red text label reads 'This form is for internal use only'. At the bottom right, there are three buttons: 'Insert', 'OK', and 'Cancel'.

Class	Active
City Works	<input checked="" type="checkbox"/>
Accrual - Applications R209	<input checked="" type="checkbox"/>
Cash-Applications R209	<input checked="" type="checkbox"/>
Applications Accrual 209	<input checked="" type="checkbox"/>
Tricia's Class For Support Demonstration	<input checked="" type="checkbox"/>
Account	<input checked="" type="checkbox"/>
Melbourne City Licensing Class	<input checked="" type="checkbox"/>
210 Class	<input checked="" type="checkbox"/>
Accounts Test Class	<input checked="" type="checkbox"/>

This form is for internal use only

Insert OK Cancel

*Class Maintenance*

## Reference Extract Filter

This section explains the Reference Extract Filter and its use in the CWP module within each Application. If References are required to be included in documentation being produced by the Module then the Reference Extract Filter form can be used to refine the References that are included in the document.

### References Extract List Filter Form

The References Extract List Filter Form is displayed from within the Letter Extract menu in the Parameters within each of the Modules. It is associated to the Extract that is used to enable References to be included in the documentation to be produced.

Upon selection of the Additional Filter Button from the Extract Type Maintenance Form the User is presented with the Reference Type available to be used for the Module currently being maintained and also the Status and Status Date fields to enable the User to nominate only References for a certain Status or for a Status Date.

One or many of the criteria may be used to identify the required Reference information to be included on the documentation.

*References Extract List Filter Form*

#### Reference Type(s)

The Reference Types available for the Module are displayed in this section of the Form. If a particular Reference Type is required to be included in the documentation then it should be moved to the Selected Reference Type section of the form.

#### Selected Reference Type(s)

The Reference Types that have been selected to be included in the documentation are shown in this section of the form. If a Reference is no longer required to be included, then it should be moved back to the Reference Type section of the form.

#### Reference Details - Status

The Status field allows the User to nominate the Status of the References that are to be included in the documentation. Upon entering into this form the field is set to 'None' however the User is able to change this if only References with a certain Status are to be included.

The options available from the drop-down list are:

- None
- Current
- Proposed
- Historic

**Reference Details – Status Date**

The Status Date field allows the User to nominate the Date of the References that are to be included in the documentation. Upon entering into this form the field is blank however the User is able to enter in the required Date or use the Calendar Pop Up to select the Date.

# Maintenance

The following topic is covered in this chapter:

[Reference Maintenance](#)

## Reference Maintenance

This section describes the linking of various Reference Type parameters to required entities (e.g. Properties, Applications). Reference details may be added, changed and removed from the entities via Reference Maintenance.

On leaving the Reference Number field in the Reference Maintenance form a check is made to see if the Reference already exists.

### **Adding a Reference**

A Reference can be inserted in Reference Maintenance. If the Reference added already exists then a link will be automatically created.

### **Modifying a Reference**

Because of the automatic linking function on Reference Maintenance, when a Reference is modified additional checks are made on the modified Reference.

#### ***The original Reference is not linked***

A check is made to see if the newly entered Reference exists and if it does then a link is created. If the newly entered Reference is unique it is merely modified.

#### ***The Original Reference was linked***

If the original Reference was linked there are four possible options that can be applied. The options are Create, Modify, Link and Consolidate. A check is made to see that the newly entered Reference already exists. If the newly entered Reference does not exist, the user has the options of Create or Modify References. If the newly entered Reference does exist, the user can Link or Consolidate References.

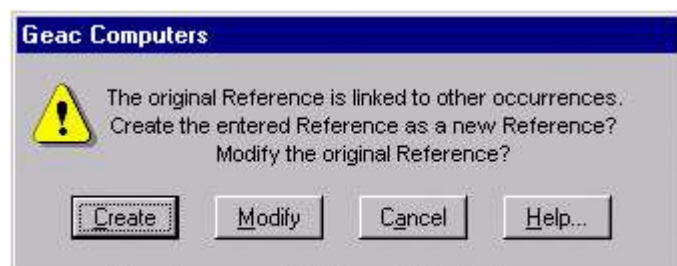
#### ***The newly entered Reference does not exist***

If the newly entered Reference does not already exist and it is linked to other occurrences then the user is required to choose a course of action, e.g.

The original Reference is linked to other occurrences.

Create the entered Reference as a new Reference?

Modify the original Reference?



**Question on modifying a linked reference.**

'Create' will remove the original Reference and create a new Reference for the occurrence. The old Reference is unlinked and a new Reference is created.

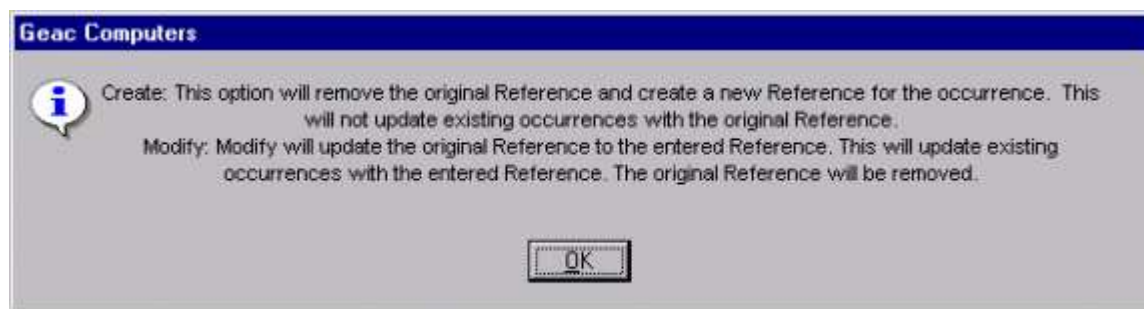
'Modify' will update the original Reference to the newly entered Reference. This will update existing occurrences with the entered Reference. The original Reference will be removed.

'Cancel' drops the User straight back to the Reference Number field.

'Help' displays the following information:

Create: This option will remove the original Reference and create a new Reference for the occurrence. This will not update existing occurrences with the original Reference.

Modify: Modify will update the original Reference to the entered



**Help Information Message.**

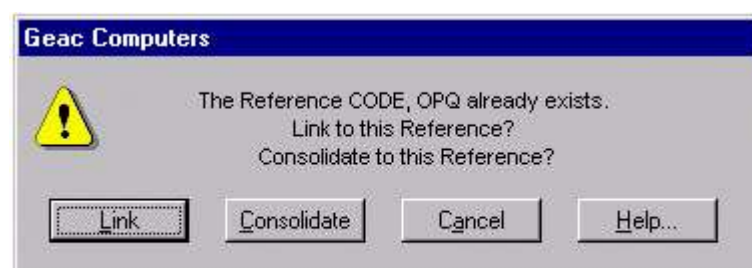
### ***The newly entered Reference exists.***

If the new reference does exist then the question asked is:

The Reference "Reference Type", "Reference Number" already exists.

Link to this Reference?

Consolidate to this Reference?



**Question on modifying a linked reference .**

'Link' will remove the link to the original Reference and create a link to the Reference entered. (Note the Reference entered already exists on other occurrences).

'Consolidate' will link all occurrences linked to the original Reference to the Reference entered. The original Reference will be removed.

'Cancel' drops straight back to the reference number field.

'Help' will display the following information:

Link: This option will remove the link to the original Reference and create a link to the Reference entered. (Note the Reference entered already exists on other occurrences).

Consolidate: This option will link all occurrences linked to the original Reference to the Reference entered. The original Reference will be removed.



**Help Information message.**

### ***Single Links Only Reference Types***

Some Reference Types do not allow multiple links of a reference i.e. The Reference Number is unique. If a Reference is entered which has a type that allows a single link only, and the Reference already exists, an error message is displayed.

The error message reads:

Reference Type "Reference Type" does not allow multiple links.

A Reference of "Reference Number" already exists for Reference Type "Reference Type".





Single link error message.

### Changing Reference Type

Modifying a reference by changing its Reference Type will also check for new and existing links. This is done on leaving the reference number field.

## References Search Profile Form

The References Search Profile displays when the Reference Option button is selected.

References Search Profile Form

### Reference Type

Enter a valid Reference Type or select one from the Pop Up.

### Reference

Enter a valid Reference to limit your search, or leave this field blank to include all References.

When using the Status field as part of your search profile, do not include a Reference, as the Status will be ignored and all occurrences of the particular Reference will be retrieved e.g.

(1) Searching on the following will retrieve all Name References that are Historic

Reference Type: NAME  
Status: HISTORIC

(2) Searching on the following will retrieve all Name References of TOM regardless of their status

Reference Type: NAME  
Reference: TOM  
Status: HISTORIC

### Status

Select a Reference Status from the drop down. Valid choices are:

- (any)
- Current
- Historic
- Proposed

The default is (any).

All References regardless of their Status can be searched on. However, when using the Status field as part of your search profile, do not include a Reference, as the Status will be ignored and all occurrences of the particular Reference will be retrieved e.g.

(1) Searching on the following will retrieve all Name References that are Historic

Reference Type: NAME

Status: HISTORIC

(2) Searching on the following will retrieve all Name References of TOM regardless of their status

Reference Type: NAME

Reference: TOM

Status: HISTORIC

### Status Date

Enter a valid Status Date Range to limit the search, or leave these fields blank to include all dates.

## Reference Selection Form

The Reference Selection Form displays the References that matched the search criteria that were entered on the Search Profile Form. Information relating to the module record is displayed in the Summary section of the Form. The Summary section also displays the Reference Type, Number, Status and Link Status.

**References Selection**

Reference Details		Property Details
Pat Property Reference	GAMEAU PROPERTIES TEST FOR 50 CH	2 Gameau Close, ADELAIDE SA 5000
Pat Property Reference	REFMANY11	<b>6 Gameau Close, ADELAIDE SA 5000</b>
Pat Property Reference	REFMANY22	1 Warwick Avenue, COOKSVILLE SA 5006
Pat Property Reference	REFMANY33	4 Warwick Avenue, COOKSVILLE SA 5006
		5 Warwick Avenue, COOKSVILLE SA 5006
		1 Warwick Avenue, COOKSVILLE SA 5006
		5 Warwick Avenue, COOKSVILLE SA 5006
		1 Warwick Avenue, COOKSVILLE SA 5006
		2 Warwick Avenue, COOKSVILLE SA 5006

**Summary**

Reference Type: PATPROP	6 Gameau Close, ADELAIDE SA 5000 (Base, Occupancy, Land) Type: Standard Alternately known as: 5 Andrew Street, ADELAIDE SA 5000 Occupier: Miss Alicia Kate Balnaves
Reference Number: GAMEAU PROPERTIES TEST FOR 50 CHARACTERS REQUIRED	
Reference Status: Historic 26-Jun-2003	
Link Status: Historic 26-Jun-2003	

Options    Modify    Close

*References Selection Form*

### Reference Details

These fields display the selected Reference Type and Description.

### Details

This field displays the Details of the Module relating to the Reference record. In the above example the Animal Details are shown.

### Summary boxes

The Summary box on the left displays the Reference details. The Summary box on the right displays the Module details. In the above example the Animal Details are shown.

If this form is called from the Customer Service Search Profile, then the Summary boxes will display the Customer Request Details on the left hand side and the Notes Details on the right hand side. If the Request is confidential and the user does not have access to it, a warning message will display in both Summary boxes.

## Reference Maintenance Form

This form enables the creation of Reference details on a particular entity. (E.g. Property or Applications) The Reference attached to the entity provides an additional search path to access that entity.

For example

A Reference of an 'Old Assessment Number' may be defined on a Property. Via the Property Search Profile form, this Reference could be used to identify the property in future searches.

For additional information on adding and maintaining References please refer to details under the previous heading.

*Reference Maintenance Form*

### Reference Type

This field contains the Reference Type Code required. These are defined within the Reference Type Parameters. The pop-up button enables a list of available Reference Types to be accessed for selection.

### Description

This field contains the Reference Type Description.

### Reference Number

This field contains the Reference details which relate to the selected Reference Type.

For example

If the Reference Type is "Old Property Number", the Reference Number would contain the Old Property Number for the property being maintained (e.g. P125421)

### Reference Status

This field contains the Status of the Reference Type attached to the property. This status detail is informational only. Three Status options are available from the drop-down list. The Status will default to current on entry of a new Reference Type.

- Current
- Historic
- Proposed

NOTE:- Where the Reference is Linked to other entries and the Reference Status is changed, the following message is displayed to the User 'All links to this reference will be changed to historic. Continue? Yes, No'.

### Status Date

This field contains the Date that the Status on the Reference Type changed. For a new Reference Type, with a Status of Current, the Date will default to the current date. If the Status is changed, this Date will automatically reflect the Date that the Status was changed (i.e. current date).

This Date may be overridden if required.

### Links Button

This button is used to view the Additional Links Enquiry form, in order to see the other Module Records that this Reference is also linked to.

### Link Status

This field is set for the actual Link. Unlike the Status field (which represents the Status of the actual Reference and is the same on all linked records) the Link Status reflects the Status of the Link to the actual Module Record that it has been selected on. Therefore this field can be different on each Link Record.

### Link Status Date

This field is set for the actual Link. Unlike the Status Date field (which represents the Date the Status of the actual Reference was changed and is the same on all linked records) the Link Status Date reflects the Date the Status of the Link to the actual Module Record that it has been selected on, had been updated.

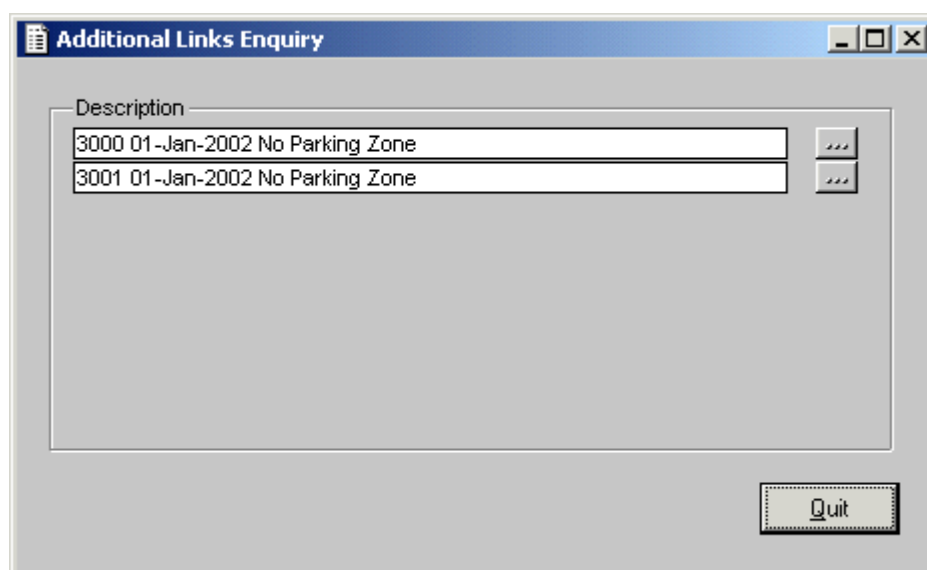
Therefore this field can be different on each Link Record.

### 'Link To' Button

This button is used to Link to an existing Reference within the system.

## Additional Links Enquiry

This form allows you to see what other records (property, application etc) are linked to the selected Reference. Nothing can be changed in this form, as all information is for display only.



*Additional Links Enquiry Form*

**Description**

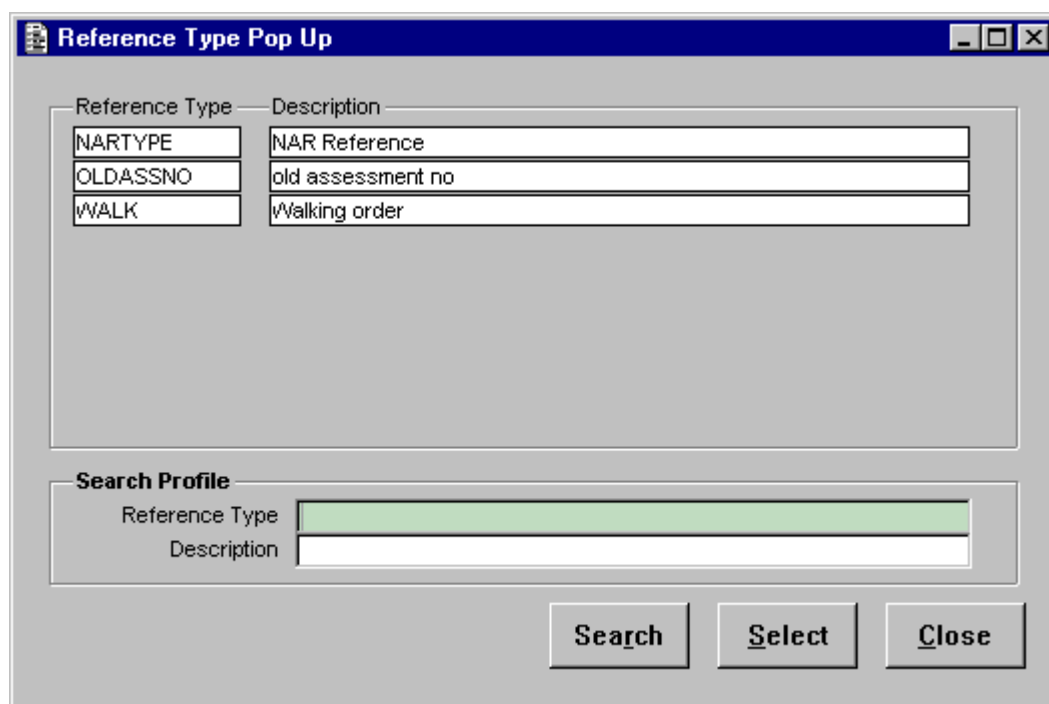
This field shows the description of the relevant property address, rates assessment number etc.

This field is display only and cannot be maintained.

There is a Detail Button positioned at the end of each Link Record. Selecting the Detail Button will display the Link in Maintenance mode. For example if the Link was for an Application Reference then detailing out on the Detail Button would display the Linked Application in Maintenance Mode.

**Reference Type Pop Up Form**

This form enables the selection of available Reference Types to be linked to a new or existing Reference.



The screenshot shows a window titled "Reference Type Pop Up". It contains a table with two columns: "Reference Type" and "Description". The table lists three entries: "NARTYPE" with description "NAR Reference", "OLDASSNO" with description "old assessment no", and "WALK" with description "Walking order". Below the table is a "Search Profile" section with two input fields: "Reference Type" and "Description". At the bottom of the window are three buttons: "Search", "Select", and "Close".

Reference Type	Description
NARTYPE	NAR Reference
OLDASSNO	old assessment no
WALK	Walking order

**Search Profile**

Reference Type

Description

*Reference Type Pop Up Form*

**Reference Type**

This field contains the Reference Type codes available for selection. No modification or deletion of this field is allowed.

**Description**

This field contains the Reference Description associated with each of the Reference Types available for selection. No modification or deletion of this field is allowed.

**Search Profile - Reference Type**

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

**Search Profile - Description**

Enter a Description on which to base your search and use the Search button to initiate the search. Wild card searching is available on this field.

**Reference Pop Up Form**


This form is used to link previously existing references to a record (e.g. property, application, rates assessment etc). The search profile can be used to select the reference record which is required.

**Reference Pop Up**


Reference Type	Reference Number	Status	Status Date
TRADENAME	BAKERS DELIGHT	Current	30-Sep-1997
TRADENAME	CACTUS CAFE	Current	14-Nov-1997
TRADENAME	CARLISLE ENTERPRISES	Current	09-Dec-1997
TRADENAME	KRISSY'S	Current	08-Dec-1997
TRADENAME	PAM'S PLACE	Current	08-Dec-1997
TRADENAME	SMITH RESIDENCE	Current	09-Dec-1997
TRADENAME	SPDFGH	Current	12-Jan-1998
TRADENAME	TEST TRADING	Current	08-Jan-1998
TRADENAME	THIS IS BRIAR CLOSE	Current	11-Feb-1998

**Search Profile**

Reference Type:   Trading Name:

Reference Number:

Status:  

Status Date:

**Search** **Select** **Quit**

Reference Pop Up Form

**Reference Type**

This field shows the type of the reference. Reference Types are specified in the Reference Type Maintenance form.

This field is display only and cannot be maintained.

**Reference Number**

This field shows the individual reference number for the reference. These are created in the Reference Maintenance form.

This field is display only and cannot be maintained.

**Status**

This field shows the individual status for each reference record. Statuses for references are allocated when they are created in the Reference Maintenance form.

This field is display only and cannot be maintained.

**Status Date**

This field shows the individual Status Date for each reference record. Status Dates for references are allocated when they are created in the Reference Maintenance form.

This field is display only and cannot be maintained.

**Search Profile - Reference Type**

In these fields, a Reference Type can be specified on which to search on. Use the Pop Up button or double click in the field to bring up the Reference Type field.

**Search Profile - Reference Number**

This field can be used to search for an individual Reference Number. Wild card searching is available on this field.

**Search Profile - Status**

This field can be used to search for a group of records with a particular Status. Use the drop down arrow to display a list of possible Statuses.

**Search Profile - Status Date**

This field can be used to search for a record or records with a particular Status Date. Double click on this field to bring up the Calendar Pop Up form.

## Reference Type Maintenance Form

This form is used by Applications, Licensing and Infringements to add a Reference record to an individual record. Generally, the form will be found via the options menu (or form) in a main summary form (i.e. Infringements Summary etc). Any References created with this form will then be specific to the application they were created in.

Reference Type	Description	Sharing	Active
APPNO	Application Number (One)	One	<input checked="" type="checkbox"/>
APPROVALNO	Approval Number (One)	One	<input checked="" type="checkbox"/>
INSPNO	Inspection Number (Many)	Many	<input checked="" type="checkbox"/>
PLANNO	Plan Reference Number (Many)	Many	<input checked="" type="checkbox"/>
PREVNO	Previous Application Number (Many)	Many	<input checked="" type="checkbox"/>
SUBPLAN	Subsidiary Plan Numbers (Many)	Many	<input checked="" type="checkbox"/>
TESTING	testing (one)	One	<input checked="" type="checkbox"/>
TMANYT	test for many option links	Many	<input checked="" type="checkbox"/>

*Reference Type Maintenance Form*

### Description

This field describes the Application or Licensing Class being used, or the Infringement Type. This field is display only and cannot be maintained.

### Reference Type

This field displays a short description of the type of reference. Up to six alphanumeric characters may be used.

### Reference Description

This field displays a longer Description of the Reference. Up to 50 alphanumeric characters may be used.

### Sharing

This field is used to specify whether the Reference value is able to be used for more than one record. For example, if the value for this field is set to "One", then only one application record can have the Reference value associated with it at any one time. When it is set to "Many", any number of application records can use the same Reference value.

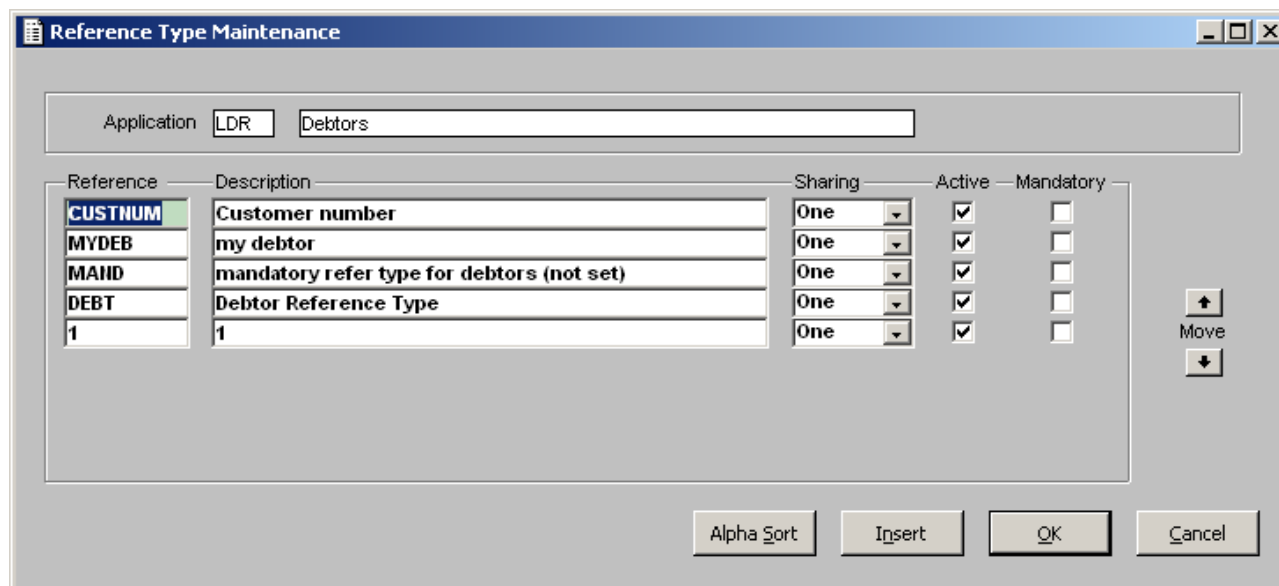
### Active

If this box is checked on, the Reference Type is available for selection within an Application (e.g. Infringements, Licensing). Reference Types which are made inactive after they have been linked can still be viewed via the relevant application, but no new records can be added using the Reference Type.

## Reference Type Maintenance Form

This form is used by all other Modules other than Applications, Licensing and Infringements to add a Reference record to an individual record. The form is displayed when the Sequence option is selected for a Reference Type via the Reference Type Maintenance Menu with the individual Module or within the Reference module itself.

**NOTE:** When References are added they are placed at the end of the Reference List and the Move Buttons will need to be used if the Reference is to be repositioned.



The screenshot shows the 'Reference Type Maintenance' window. At the top, there's a header bar with the title and window controls. Below it, an 'Application' field is set to 'LDR' and a text field contains 'Debtors'. The main area is a table with columns: Reference, Description, Sharing, Active, and Mandatory. The table contains five rows of data. To the right of the table are 'Move' buttons (up and down arrows). At the bottom are 'Alpha Sort', 'Insert', 'OK', and 'Cancel' buttons.

Reference	Description	Sharing	Active	Mandatory
CUSTNUM	Customer number	One	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MYDEB	my debtor	One	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MAND	mandatory refer type for debtors (not set)	One	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DEBT	Debtor Reference Type	One	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1	1	One	<input checked="" type="checkbox"/>	<input type="checkbox"/>

*Reference Type Maintenance Form*

### Application

This field describes the Module being used. This field is display only and cannot be maintained.

### Reference Type

This field displays a short description of the type of reference. Up to six alphanumeric characters may be used.

### Reference Description

This field displays a longer Description of the Reference. Up to 50 alphanumeric characters may be used.

### Sharing

This field is used to specify whether the Reference value is able to be used for more than one record. For example, if the value for this field is set to "One", then only one application record can have the Reference value associated with it at any one time. When it is set to "Many", any number of application records can use the same Reference value.

### Active

If this box is checked on, the Reference Type is available for selection within an Application (e.g. Infringements, Licensing). Reference Types which are made inactive after they have been linked can still be viewed via the relevant application, but no new records can be added using the Reference Type.

### Mandatory

If this box is checked on, the Reference Type is Mandatory for the Module. The Mandatory option is only available for the LRA and LDR modules. Upon entering in a new Assessment for one of these modules, if the Reference is flagged as Mandatory then the User is asked to add in the Reference.



# External Reference Import

The following topics are covered in this chapter:

[Import Format Maintenance](#)  
[Import External References](#)  
[Process External References](#)

# Import Format Maintenance

The Import Format Maintenance function is used to define the format that is to be used when the External File is loaded into Pathway. Multiple Import Formats can be created via this option.

It should be noted that the Validation process will expect the following formats for the various Modules when checking the validity of the Application Reference.

The Application Reference is the Field to be used to find the Application Record that is to be updated with the Reference Record.

This information will be obtained from the Import Field APPLNREF. As validation of external references varies from module to module, each module will expect different data in this field. The particular requirements of each module are as follows:-

## Applications & Licensing References

The APPLNREF field will expect enough components for the System to recognise it as a unique number. The format required is:-

999/YYYY/SS/AA

Where 999 = Application/Licence Number  
 YYYY = Application/Licence Year  
 SS = Staged details (only required on Staged Applications)  
 AA = Amended detail (only required on Amended Applications)

## Infringement References

The format required is:-

9999-X

Where 9999 = Infringement Number  
 X = Offence Number

Note that the Offence Number is optional, however if the Infringement has more than one Offence and the Offence Number is not listed an error will be reported.

## Rates, Debtors & Trade Waste References

The Assessment Number is the value that will be expected in the APPLNREF field. If the Validate Check Digit parameter is on, then the check digit is expected as the last digit of the Assessment Number and included in the validation.

## Property References

The Property Key is the value that will be expected in the APPLNREF field. If an attempt is made to create a Reference record against a Historic Property then an error will be reported during the Validation process.

## Customer Request References

The Request Number is expected in the APPLNREF field.

## Animal Control References

The Animal Reference Number is the value that will be expected in the APPLNREF field. If the Validate Check Digit parameter is on, then the check digit is expected as the last digit of the Animal Reference Number and included in the validation.

## Victorian Valuations References

The Assessment Number is expected in the APPLNREF field.

## New Zealand Valuations References

The TPKLVZVAL number is expected in the APPLNREF field.

Additionally the following fields will be truncated if the import data exceeds the length of the field;

<b>Field Name</b>	<b>Description</b>	<b>Length</b>
APPLNREF.CRFIREF	Application Reference	50
TYPECODE.CRFIREF	Reference Type Code	10
TYPEDESCR.CRFIREF	Reference Type Description	50
REFNUMBER.CRFIREF	Reference Number	50
STATUS.CRFIREF	Reference Status	1

## Import Format Maintenance Form

The Import Format Maintenance form allows the defining of Formats that are to be used for the loading of External References into Pathway. Information such as the Description, Number of References, and Type of File are defined on this form. A Detail Button takes the user to the Import Format Details form where the details of each of the lines of the file can be entered.

*Import Format Maintenance Form*

### Code

The Code relating to the Import Format is displayed in this field. This field is maintained by the User. A Code of up to 6 characters can be entered.

### Description

A 50 character Description field is available to describe the Import Format. This field is maintainable by the User.

### Number of References

The Number of References is used to define the number of references that are expected to be created per line of the Import File.

For example if 4 was selected in this field, when the User detailed out to the Import Format Details Maintenance form there would be 4 records available for the User to define the Reference information in.

### Import Format

The Import Format defines whether the file being loaded is in 'CSV' (Comma Separated Delimited) or 'Fixed Width' format. Depending on what is defined in this field for the Format will then determine whether the Start / End Position fields or the Field Number fields are available for the User to define.

### Text Qualifier

If the Import Format is defined as 'CSV' then the Text Qualifier field needs to be set to inform the process of the delimiter character that has been used within the Import File.

The Text Qualifier field is used to specify whether single or double quotation marks are to be used to encompass a text field.

If the single quote is selected from the drop down list then imported fields will be contained within a single quote symbol (''). A comma will still separate the fields.

If the double quote is selected from the drop down list then imported fields will be contained within a double quote symbol (""). A comma will still separate the fields.

If (default) is selected from the drop down list then imported fields will only be separated by a comma.

### Active

The Active field informs the User that the Format is available for use to import External Reference Files. If the Active field is checked off then the Format is not available to be used to import External References.

### Import Format Details Button

The Import Format Details Button displays the Import Format Details Maintenance form. This is where the details of each reference per line/record will be entered and maintained.

## Import Format Details Maintenance Form

The Import Format Details Maintenance form allows the defining of details of each reference per line/record. The Application (module), Class (if applicable to the selected module) and Reference Type may be selected for each reference of the file. If more than 1 Reference is expected per line/record of the Import file then Application (module), Class (if applicable) and Reference Type are mandatory entries for each reference.

If the File to be loaded contains only the Reference Number and Application Reference then there is no need to select the Module that the file is for. The Import Format Reference Detail Button can still be selected and the required fields nominated and formatted. When the File is loaded via the Import External References menu then the Application can be nominated at that time.

The Detail Button next to the reference will display the Import Format Reference maintenance form to allow the defining of the position of the reference fields for that record within the line of the Import File.

Import Format Details Maintenance

Code: PATLPA

Description: pats prop ref test - csv

Import Format: Comma Separated (CSV)

Sequence: 1 Application: LAP Application

Class: Building Applications P211

Reference Type: PATSONE one only

Insert OK Cancel

Import Format Details Maintenance Form

**Code**

The Code for the Import Format that has been selected is displayed in this field. This is a non maintainable field.

**Description**

The Description of the Import Format that has been selected is displayed in this field. This is a non maintainable field.

**Import Format**

The Import Format field details the format being defined as either 'CSV' (Comma Separated Delimited) or 'Fixed Width' format. Depending on what has been defined in the Format field on the Import Format Maintenance form will then determine whether the Start / End Position fields or the Field Number fields are available for the User to define on this form.

**Sequence**

The Sequence field is used to distinguish between each reference contained within one line/record of the import file. By changing the Sequence value this field will re-sequence the display on the form when the form is next selected.

**Application**

The Application that the Reference is to be loaded for is displayed in this field. The Application Code can be entered directly into the field or the Pop Up can be used to display a list of the Applications available for the function. Depending on the Application Code selected will depend on whether additional fields are then displayed on the form.

If an Application Code is selected that has Classes or Types then the form will display a Pop Up form to enable the User to select the Class or Type required. This information is then displayed in an additional field named Class on the bottom section of the Form.

If the File to be loaded contains only the Reference Number and Application Reference then there is no need to select the Module that the file is for. The Import Format Reference Detail Button can still be selected and the required fields nominated and formatted. When the File is loaded via the Import External References menu then the Application can be nominated at that time.

**Import Format Reference Detail Button**

Selecting the Import Format Reference Detail Button takes the User out to the Import Format Reference Maintenance Form where the required fields that will be in the file and are to be updated are selected.

This process is to be done for each record that appears on the Import Format Details Maintenance form.

**Class**

The Class field will only display when the record currently in focus has an Application Code of either LAP (Applications), LLC (Licensing) or LIF (Infringements). This displays the Class for the Module that the Reference update process will occur for.

**Reference Type**

The Reference Type nominates the Reference that is to be updated from the File. This field can be left blank if there is only 1 Reference per line/record on the file. If more than 1 Reference is expected per line/record of the import file then the Reference Type is mandatory for each Reference.

**Import Format Reference Maintenance Form**

The Import Format Reference Maintenance form allows the defining of the position of the Reference Fields within the Import file. The following fields can be selected:-

- REFNUMBER – Reference Number
- APPLNREF – Application Reference
- STATUS – Reference Status
- STATUSDATE – Reference Status Date
- TYPECODE – Reference Type

If the file format has been set to Fixed Width then the Start and End Positions of the fields will need to be set. If the file format has been set to CSV then the position number of the field within a line/record of the file will need to be defined.

Additionally the following fields will be truncated if the import data exceeds the length of the field;

<b>Field Name</b>	<b>Description</b>	<b>Length</b>
APPLNREF.CRFIREF	Application Reference	50
TYPECODE.CRFIREF	Reference Type Code	10
TYPEDESCR.CRFIREF	Reference Type Description	50
REFNUMBER.CRFIREF	Reference Number	50
STATUS.CRFIREF	Reference Status	1

NOTE: The fields REFNUMBER and APPLNREF are mandatory on all references.  
If the field STATUS is on the file being input it can only be 1 Character in length.  
The letters 'C' for Current, 'H' for Historic or 'P' for Proposed can be used.

**Import Format Reference Maintenance**

Import File Format: MODC modules - csv

Application: LAP Application

Class: Applications for Building - PACA

Reference Type: MULTI Many Selection

Sequence: 1

Field Name	Description
STATUS	Reference Status
STATUSDATE	Reference Status Date
TYPECODE	Reference Type Code

Field Name	Start Position	End Position	Field Number
APPLNREF			1
REFNUMBER			3

OK Cancel

Import Format Reference Maintenance Form – CSV Format

*Import Format Reference Maintenance Form - Fixed Width Format*

### Import File Format

The Code and its Description that has been selected for the Import Format are displayed in this field. These field is non maintainable.

### Application

The Application Code and its Description that has been selected is displayed in this field. This is a non maintainable field.

### Class

If the Application selected also had a Class nominated then the Description of the Class for the Application is displayed in this field. If there is no Class associated to the Application then this field is not displayed. This is a non maintainable field.

### Reference Type

If a Reference Type has been nominated for the Application then the Reference Type Code and its Description are displayed in this field. This is a non maintainable field.

### Sequence

The Sequence Number that has been assigned to the Application Record is displayed in this field. This is a non maintainable field.

### Field Name

The Fields available for selection are displayed in this area. Select the required field and move it to the right so that it can be defined.

NOTE: The fields REFNUMBER and APPLNREF are mandatory on all references.

If the field STATUS is on the file being input it can only be 1 Character in length.

The letters 'C' for Current, 'H' for Historic or 'P' for Proposed can be used.

### Description

The Descriptions of the Fields available for selection are displayed in this area.

### Field Name

The Field Name shows the Field that has been selected as being included in the file that is to be loaded. Once the Field Name has been selected either the Start and End Position fields will need to be set or if they are not available then the Field Number will need to be entered.

NOTE: The fields REFNUMBER and APPLNREF are mandatory on all references.



If the field STATUS is on the file being input it can only be 1 Character in length. The letters 'C' for Current, 'H' for Historic or 'P' for Proposed can be used.

### Start Position

The Start Position and End Position fields are only available when the File Format has been defined as Fixed Width. If the File Format has been defined as CSV then these fields are not available for use.

When the File Format has been defined as Fixed Width then the Start Position field is used to identify where on a line/record of the File this field's information is to be found. The End Position is then used to identify the End point of the information.

The following fields will be truncated if the import data exceeds the length of the field;

<i><b>Field Name</b></i>	<i><b>Description</b></i>	<i><b>Length</b></i>
APPLNREF.CRFIREF	Application Reference	50
TYPECODE.CRFIREF	Reference Type Code	10
TYPEDESCR.CRFIREF	Reference Type Description	50
REFNUMBER.CRFIREF	Reference Number	50
STATUS.CRFIREF	Reference Status	1

### End Position

The End Position and Start Position fields are only available when the File Format has been defined as Fixed Width. If the File Format has been defined as CSV then these fields are not available for use.

When the File Format has been defined as Fixed Width then the End Position field is used to identify where on a line/record of the File this field's information stops. The Start Position is used to identify the starting point of the information.

The following fields will be truncated if the import data exceeds the length of the field;

<i><b>Field Name</b></i>	<i><b>Description</b></i>	<i><b>Length</b></i>
APPLNREF.CRFIREF	Application Reference	50
TYPECODE.CRFIREF	Reference Type Code	10
TYPEDESCR.CRFIREF	Reference Type Description	50
REFNUMBER.CRFIREF	Reference Number	50
STATUS.CRFIREF	Reference Status	1

### Field Number

The Field Number field is only available when the File Format has been defined as CSV. If the File Format has been defined as Fixed Width then this field is not available for use.

The value entered into the Field Number identifies on a line/record of the File the data that is to be used to find this field's information.

# Import External References

The Import External References option is used to load the External file into a temporary table and allow validation processes to occur prior to being updated into Pathway against the relevant records.

## Import External References Control Form

The Import External References Control form enables a file containing External References to be imported into an External Reference table. Once the file has been processed via this option the information will be available in the Process External References menu where the information can be validated and maintained and updated into Pathway.

Various selections are available from this form. For information about each Selection Field refer to the actual Field Help for the Selection Field.

*Import External References Control Form*

### Import Format

The Import Format field is used to identify the Format that is to be used for the importing of the Reference information. Entry in this field is mandatory. If the Import Format is not known then the Pop Up can be used to display a list of available Formats for selection.

If the Import Format nominated has the Application, Class (if applicable) and or the Reference Type defined on it then these fields on this form are not available of use.

### Application

If the Import Format that has been selected did not include the Application that the References are for, then the Application field is available for the User to enter in the Module to be used. The Application then becomes a mandatory field.

If the Import Format selected does include an Application then the Application field on this form is dimmed and the User is not able to enter in any information.

Upon entering in the Application if it is one of either Applications, Licensing or Infringements the User is prompted with the Classes associated to the Module so that the applicable Class can be selected. This Class information is then returned to the form and displayed in the Class field.

### Class

The Class field is only available for the Application Types of Applications, Licensing and Infringements. For all other Application Types this field is non maintainable.

If the Import Format that has been selected did not include the Application that the References are for, and the Application field above has been set at either Applications, Licensing or Infringements then the Class field will display the Class that the References relate to for the Application.

### Reference Type

If the Import Format that has been selected did not include the Reference Type that the References are for, then the Reference Type field is available for the User to enter in the Reference Type to be used. The Reference Type field then becomes a mandatory field.

If the Import Format selected does include a Reference Type then the Reference Type field on this form is dimmed and the User is not able to enter in any information.

If the Pop Up button is selected then the Application Pop Up form is displayed. The User then needs to select the Application being updated. This in turn will display the Reference Types associated to the Application.

### Status

If the Status for the Reference is not included in the file being loaded then the value that has been selected here will be used. If this field is left blank and there is no Status included on the file then the system will default in Current as the Status for the Reference Records.

The Status field on the file being input can only be 1 Character in length. The letters 'C' for Current, 'H' for Historic or 'P' for Proposed can be used.

### Status Date

The Status Date is the default Date to be applied to all imported References if it has not been defined on the Import Format. If this field is left blank and there is not a Date on the import File then the system will default in the System Date as the Status Date.

### Validate

The Validate Option allows the User to determine whether to validate the data in the File at the time of loading the file via this process or not. If the Validation is not done at this time the User can use the Validate Option within the Process External References Menu. Only those Records that have passed validation will be updated into the Reference System.

If the Validate Checkbox is not flagged on then the Report Option will not be available for the User to use. The Report Option will only display if the Validate Checkbox has been flagged on.

### Report

The Report Option defaults to Summary upon entry into this form. If the Validate Checkbox has not been flagged on, then the Report Option is not available for selection. The Report Option will only display if the Validate Checkbox has been flagged on.

The Options available via the Dropdown are:-

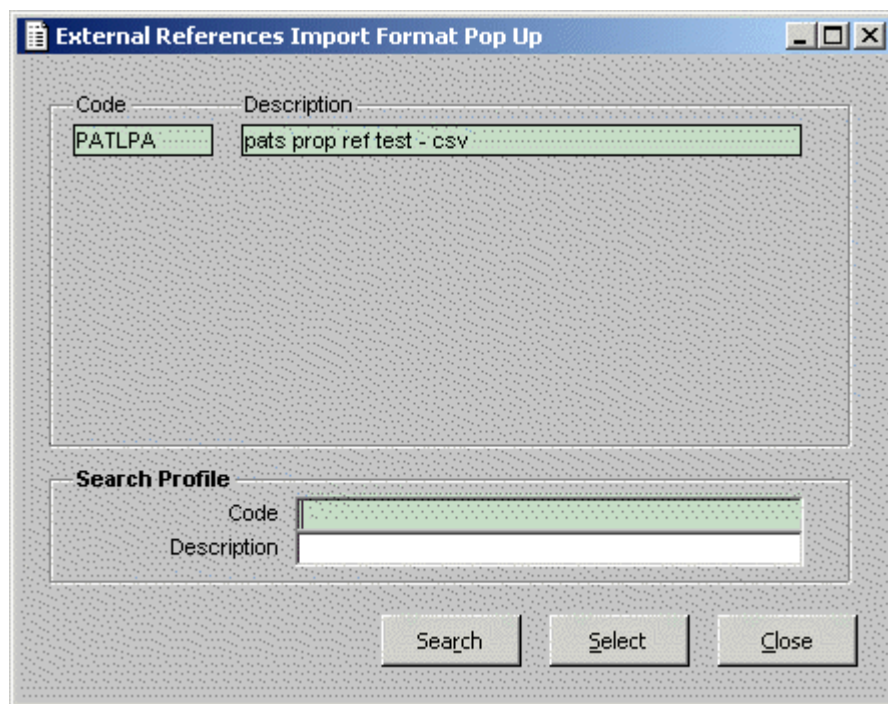
- None (no report produced)
- Summary (only details of References in Error will be output)
- Detail (details of all References in the file will be output)

### Filename

The Filename field contains the directory of where the Reference File is to be located. If the path is not known then the User can select the Detail Button to find and identify the File required to be loaded.

## External References Import Format Pop Up Form

The External References Import Format Pop Up form allows the User to select the Import Format that is to be used for the importing of the External Reference File. The Import Formats shown on this Pop Up form have been defined within the Import Format Maintenance menu.



The dialog box titled "External References Import Format Pop Up" contains a table with two columns: "Code" and "Description". The first row shows "PATLPA" in the Code column and "pats prop ref test - csv" in the Description column. Below the table is a "Search Profile" section with two input fields: "Code" and "Description". At the bottom are three buttons: "Search", "Select", and "Close".

Code	Description
PATLPA	pats prop ref test - csv

**Search Profile**

Code:

Description:

Search Select Close

*External References Import Format Pop Up Form*

**Code**

The Import Format Code available for selection is displayed in this field.

**Description**

The Description of the Import Format available for selection is displayed in this field.

**Search Profile - Code**

The Search Profile – Code field can be used to search for the required Import Format if it is not displayed as one of the first 9 Format Records available.

**Search Profile - Description**

The Search Profile – Description field can be used to search for the required Import Format if it is not displayed as one of the first 9 Format Records available.

## Process External References

The Process External References option allow the validation, maintenance and deletion of External Files that have been entered into the temporary files before the External Reference data is updated against the actual records. Users are able to run reports and the validation process before the update is completed.

### Process External References Form

The Process External References Form allows the User to maintain, validate, delete and update the Import Files that have been imported into Pathway via the Import External References Menu.

This option lists all the batches of External References that have not been imported into the main Reference table. From this form it is possible to select one or more batches for processing. The processing options available are:-

- Delete
- Validate
- Validate and Update

With both the Validate and Validate and Update options a report can be produced in either summary or detail format.

From this form it is possible to select one or more Batches for processing.

Batch	Date / Time	Number of References	Validation Status
1	28-May-2003 08:56:30	3	Validated, No Errors
2	28-May-2003 09:03:03	3	Validated, Errors
3	28-May-2003 09:07:45	3	Validated, No Errors

**Processing Options**

Option: **Validate Only**

Report: **Summary**

Options Process Cancel

*Process External References Form*

#### Batch

The Batch Number that has been assigned to the file by the System is displayed in this field. This number will start at number One and increment as the Files are loaded into the system. If there are no Batches left to be updated then the System will start to allocate the Batch Number from One again.

#### Date / Time

The Date / Time field displays the date and time that the Import File was loaded into the System.

#### Number of References

The Number of References field displays the total number of References that have been created via the upload function. If for example each record contained 3 References and there were 3 records in the file when it was loaded, then the Number of References for this file would show as 9.

### **Validation Status**

The Validation Status shows the current Status of the Import File. If the Import File had been loaded without Validation being checked on then the status for the File would display as 'Not Yet Validated'. If errors had been encountered during the validation process then the Status field could display 'Validated, Errors'. The Validation Status field explains to the User what might be required to be reviewed and corrected.

### **External Reference Selection Detail Button**

The External Reference Selection Detail Button will display the External Reference Records that have been created when the Import File was loaded. From this display the User is able to review any records that may be in error or adjust any entries.

### **Processing Options - Option**

Upon entry into the form the Option is set to Validate Only. This can be changed by using the Dropdown. The Options available are:-

- Validate Only
- Validate & Update
- Delete

#### Validate Only

The Validate Only option will verify each Reference against the defined Application and the Reference Type. Any errors encountered will be reported if the Report Option has been nominated.

#### Validate & Update

The Validate & Update option will verify each Reference against the defined Application and the Reference Type. Those Reference records that pass the validation process will be updated into the main Reference table and linked to the module record. References that are successfully created into the Reference table are deleted from the Batch and the Batch itself will be deleted if no other Reference records remain. Any errors encountered will be reported if the Report Option has been nominated and will remain in the Batch for the User to review.

#### Delete

The Delete option will remove a Batch from the External Reference tables. When this option has been selected then the Report Option is not available.

### **Processing Options - Report**

With both the Validate and Validate & Update Options it is possible to output a Summary or Detailed Report of the validation process.

The Options available via the Dropdown are:-

- None (no report produced)
- Summary (only details of References in Error will be output)
- Detail (details of all References in the file will be output)

## **External Reference Selection Form**

After selecting the Detail button from the External References form the details of the file are displayed on this form.

The form lists all the External References in the batch and their Validation Status. If required, the Search Profile available at the bottom of the form can be used to narrow the References displayed to those that match the search criteria.

If the Modify Button is selected against the record then the details of the selected External Reference will be available for maintenance. Additionally if validation is required for a particular record then the Modify Button should be selected so that the selected record can be validated prior to attempting to update the batch.

**Batch Details**

Batch Number: 2      Number of References: 9  
 Date / Time: 26-Jun-2003 11:24:55      Status: Validated, Errors

Reference Number	Reference Type	Application	Application Reference	Status	Validation Status
ASSFOR166303	OLDNO	LPA	166303	Current	Validated, Errors
ASSFOR166304	OLDNO	LPA	166304	Current	Validated, Errors
ASSFOR166305	OLDNO	LPA	166305	Current	Validated, Errors
1FOR166303	OLDNO	LPA	166303	Current	Validated, No Errors
REFMANY11	PATPROP	LPA	166305	Current	Validated, Errors
REFMANY33	PATPROP	LPA	166303	Current	Validated, Errors
REFMANY44	PATPROP	LPA	166304	Current	Validated, Errors
1FOR166304	PATSONE	LPA	166304	Current	Validated, Errors
1FOR166305	PATSONE	LPA	166305	Current	Validated, Errors

**Search Profile**

Reference Number:       Application Reference:   
 Status:       Status Date:   
 Validation Status:       Class:   
 Application:  >>   
 Reference Type:  >>

Search      Modify      Close

*External Reference Selection Form*

#### Batch Details – Batch Number

The Batch Number that has been assigned to the file by the System is displayed in this field.

#### Batch Details – Date / Time

The Date / Time field displays the date and time that the Import File was loaded into the System.

#### Batch Details – Number of References

The Number of References field displays the total number of references that have been created via the upload function. If for example each record contained 3 References and there were 3 records in the file when it was loaded, then the Number of References for this file would show as 9.

#### Batch Details - Status

The Status field shows the current Validation Status of the Import file.

#### Reference Number

The Reference Number that is to be loaded against the Application is displayed in this field. This information was obtained from the Import Field REFNUMBER.

#### Reference Type

The Reference Type field shows the Reference Type Code that the Reference Number will be updated to for the Application.

#### Application

The Application Code is shown in this field. This is the Module that the Reference Type is for.

#### Application Reference

The Application Reference is the Reference to be used to find the Application Record that is to be updated with this Reference Record.

This information was obtained from the Import Field APPLNREF. As validation of external references varies from module to module, each module will expect different data in this field. The particular requirements of each module are as follows:-

#### Applications & Licensing References

The APPLNREF field will expect enough components for the System to recognise it as a unique number. The format required is:-

999/YYYY/SS/AA

Where 999 = Application/Licence Number  
 YYYY = Application/Licence Year  
 SS = Staged details (only required on Staged Applications)  
 AA = Amended detail (only required on Amended Applications)

#### Infringement References

The format required is:-

9999-X

Where 9999 = Infringement Number  
 X = Offence Number

Note that the Offence Number is optional, however if the Infringement has more than one Offence and the Offence Number is not listed an error will be reported.

#### Rates, Debtors & Trade Waste References

The Assessment Number is the value that will be expected in the APPLNREF field. If the Validate Check Digit parameter is on, then the check digit is expected as the last digit of the Assessment Number and included in the validation.

#### Property References

The Property Key is the value that will be expected in the APPLNREF field. If an attempt is made to create a Reference record against a Historic Property then an error will be reported during the Validation process.

#### Customer Request References

The Request Number is expected in the APPLNREF field.

#### Animal Control References

The Animal Reference Number is the value that will be expected in the APPLNREF field. If the Validate Check Digit parameter is on, then the check digit is expected as the last digit of the Animal Reference Number and included in the validation.

#### Victorian Valuations References

The Assessment Number is expected in the APPLNREF field.

#### New Zealand Valuations References

The TPKLVZVAL number is expected in the APPLNREF field.

### **Status**

The Status field displays the Status of the Reference. This field is display only. If the Status requires changing then the Modify Button can be selected.

### **Validation Status**

The Validation Status shows the Status of the individual Reference Record. It is possible that one record will have no errors but another may not be valid. Once a Record has been validated and there are no errors the Status will show 'Validated, No Errors'. Once all the Records have been validated and have a Status of 'Validated, No Errors' then the Batch Status will reflect this same Status.

### **Search Profile - Reference Number**

If a particular Reference Number is required to be displayed then the User can enter in the Reference Number (or part thereof) and search for the records. Wildcard searching is available in this field.

### **Search Profile - Application Reference**

If a particular Application Reference is required to be displayed then the User can enter in the Application Reference (or part thereof) and search for the records. Wildcard searching is available in this field.

### **Search Profile - Status**



If particular Reference Records are required to be displayed for a particular Status then the User can select the required Status from this field and search for the records. A Status of either 'Historic', 'Current' or 'Proposed' can be selected.

**Search Profile - Status Date**

If particular Reference Records are required to be displayed with a particular Status Date then the User can enter in the required Date in the field and search for the records.

**Search Profile - Validation Status**

If particular Reference Records are required to be displayed with a particular Validation Status then the User can select the required Validation Status from this field and search for the records. A Validation Status of either 'Validated, Errors', 'Validated, No Errors', 'Not Yet Validated' or 'Validated, Existing Reference' can be selected.

**Search Profile - Application**

If Reference Records for a particular Application are required to be displayed then the User can enter in the required Application Code (or use the Pop Up to display a list of valid Application Codes) and search for the records.

Note that if the Applications (LAP), Licensing (LLC) or Infringement (LIF) applications are selected the User will be prompted to select the Class that is to be used with the Application Code. The Class that is selected will display in the Class field.

**Search Profile - Class**

If the User has selected an Application Code of either 'LAP', 'LLC' or 'LIF' then they will have had to select the associated Class for the Application. The selected Class is displayed in this field.

**Search Profile - Reference Type**

If Reference Records for a particular Reference Type are required to be displayed then the User can enter in the required Reference Type Code (or use the Pop Up to display a list of valid Reference Types) and search for the records.

If an Application Code has been nominated in the Application Code field then the Reference Types associated to that particular Application Code will be displayed for the User to select the required Type.

If an Application Code has not been nominated in the Application Code field, then when the Reference Type is selected the User will be prompted as to which Application / Class the Reference Type is for. Once the Application Code has been selected then the Reference Types for that Application will be displayed for the User to select the required Type.

**External Reference Maintenance Form**

If the Modify Button had been selected against the reference record then the details of the selected External Reference are displayed on the External Reference Maintenance Form. From this form the fields Application Reference, Status, Status Date, Application, Class (if applicable) and Reference Type are able to be maintained. It is also possible to validate the details of this individual External Reference by selecting the Validate button.

*External Reference Maintenance Form*

### Reference Number

The Reference Number that is to be loaded against the Application is displayed in this field. This information was obtained from the Import Field REFNUMBER.

### Validation Status

The Validation Status field can be either 'Validated, Errors', 'Validated, No Errors', 'Not Yet Validated' or 'Validated, Existing Reference' displayed

The Validation Status shows the Status of the individual Reference Record. It is possible that one record will have no errors but another may not be valid. Once a Record has been validated and there are no errors the Status will show 'Validated, No Errors'.

### Application Reference

The Application Reference is the Reference to be used to find the Application Record that is to be updated with this Reference Record.

This information was obtained from the Import Field APPLNREF. As validation of external references varies from module to module, each module will expect different data in this field. The particular requirements of each module are as follows:-

#### Applications & Licensing References

The APPLNREF field will expect enough components for the System to recognise it as a unique number. The format required is:-

999/YYYY/SS/AA

Where 999 = Application/Licence Number  
 YYYY = Application/Licence Year  
 SS = Staged details (only required on Staged Applications)  
 AA = Amended detail (only required on Amended Applications)

#### Infringement References

The format required is:-

9999-X

Where 9999 = Infringement Number  
 X = Offence Number

Note that the Offence Number is optional, however if the Infringement has more than one Offence and the Offence Number is not listed an error will be reported.

#### Rates, Debtors & Trade Waste References

The Assessment Number is the value that will be expected in the APPLNREF field. If the Validate Check Digit parameter is on, then the check digit is expected as the last digit of the Assessment Number and included in the validation.

#### Property References

The Property Key is the value that will be expected in the APPLNREF field. If an attempt is made to create a Reference record against a Historic Property then an error will be reported during the Validation process.

#### Customer Request References

The Request Number is expected in the APPLNREF field.

#### Animal Control References

The Animal Reference Number is the value that will be expected in the APPLNREF field. If the Validate Check Digit parameter is on, then the check digit is expected as the last digit of the Animal Reference Number and included in the validation.

#### Victorian Valuations References

The Assessment Number is expected in the APPLNREF field.

#### New Zealand Valuations References

The TPKLVZVAL number is expected in the APPLNREF field.

### **Status**

The Status that was assigned to the Reference Record when loaded is shown in this field. If this particular Reference Record is required to have a different Status then the User can select the required Status from the Dropdown. A Status of either 'Historic', 'Current' or 'Proposed' can be selected.

### **Status Date**

The Status Date that was assigned to the Reference Record when loaded is shown in this field. If this particular Reference Record is required to have a different Status Date then the User can enter in the required Date or use the Calendar Pop Up to select the date.

### **Application**

The Application Module that the Reference Record was loaded against is shown in this field. If this particular Reference Record is required to have a different Application then the User can enter in the required Application Code or use the Pop Up to select the required Application.

If the Application Code is changed then the Reference Type field will be blanked out and the User will need to select the required Reference Type for the record.

### **Class**

If the Application Code is either 'Applications', 'Licensing' or 'Infringements' then the Class that has been associated to this Code is displayed in this field. If the Application Code is not one of these three then the Class field is not displayed.

### **Reference Type**

The Reference Type that the Reference Record was loaded against is shown in this field. If this particular Reference Record is required to have a different Reference Type then the User can enter in the required Reference Code or use the Pop Up to select the required Code.

Only those Reference Types associated to the Application Class selected will be displayed or available for selection in this field.

If the Application Code has been changed then the Reference Type field is blank and the User will need to select the required Reference Type for the record.

