Work Flow User Guide

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Your suggestions and comments regarding this documentation are highly regarded. Please send or fax any suggestions to your Infor Public Sector office – lghelpdesk@infor.com.

SOUTH AUSTRALIA
PO Box 360
Goodwood SA 5034
Tel: +61 8 8372 6111
Fax: +61 8 8372 6199

NEW SOUTH WALES
Level 3,
40 Miller Street
North Sydney, NSW 2060
Tel: +61 2 9021 7100
Fax: +61 2 9021 7298

NEW ZEALAND
Infor Public Sector NZ
93 Grafton Road
PO Box 2733
Auckland, NZ
Tel: +64 9 309 1860
Fax: +64 9 356 1860

VICTORIA
Level 8, 1 Southbank Blvd
Southbank, Vic 3006
Tel: +61 3 8608 8500
Fax: +61 3 8608 8599

QUEENSLAND
Level 13, 50 Cavill Avenue
Surfers Paradise, QLD 4217
Tel: +61 7 5635 4344

Pathway 3.09 (Thick Client Version)

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WORK FLOW USER GUIDE

Overview

Work Flow has been developed as a Core System (using the module code CWF). The purpose of this is to make Work Flow available to all Pathway modules.

At Release 2.06 Work Flow was integrated with Customer Service only.

At Release 2.07 Work Flow was integrated with the Customer Service, Applications and Licensing modules.

Some of the following terms and their explanations may assist when first investigating the Work Flow Module.

General Terms

Action

An Action is the smallest piece of work that the user may perform, such as printing a letter or sending e-mail.

Task

A Task is a logical piece of work that the user must perform. A Task may have many Actions recorded against it. A Task may be to ring a customer, close a call or send a notification letter.

When Actions are recorded against Tasks they are nominated as either Start or End Actions. As a Start Action they will be initiated automatically by the system when the user or the system starts a Task. As an End Action they will be initiated automatically by the system when the user completes a Task.

Procedure

A Procedure is a logical grouping of Tasks. The Procedure simplifies the loading of Tasks onto a record, such as a Customer Request.

A Customer Request that is in regard to a barking dog would potentially require many Tasks to be loaded onto it. By establishing a Procedure at the parameter level and linking the Procedure to a Request Type the required tasks are loaded automatically onto the customer request record.

The Procedure also initially controls

- The sequence in which the Tasks must be performed
- Dependencies between the Tasks (i.e. Task A must be completed before Task B can be started)
- How each of the Tasks are started (i.e. Manually by the User or Automatically on completion of the previous Task)

Calendar Formats and Duration

When establishing the Work Flow module it is **essential** that the Calendar system be set up correctly for the module.

Workflow uses the default Calendar defined in the System Parameters, however if there has been a calendar defined within the Application Class or Licensing Class then Workflow in these Modules will use this Calendar instead.

The Calendar used must specify all non-working days and contain start and end times for a working day.

The estimated duration for a task contains the length of time that the task is expected to take. It works in conjunction with the Duration Format (Minutes, Hours, Days etc.) and the Calendar in use by Work Flow. Using a combination of the expected duration for the Task and the Calendar used by Work Flow the estimated completion dates are calculated.

Example

Task is Started - Monday 2nd August 1999 @ 9:20 am
Calendar format is Working Days
Saturday and Sunday are non-working days.

1 minute Est. End = Monday 2nd August 1999 @ 9:21 am

1 hour Est. End = Monday 2nd August 1999 @ 10:20 am

1 day Est. End = Tuesday 3rd August 1999 @ 9:20 am

1 week Est. End = Monday 9th August 1999 @ 9:20 am

1 month Est. End = Thursday 2nd Sept 1999 @ 9:20 am (If this date was a non working day the result would be Friday 3rd Sept)

1 year Est. End = Wednesday 2nd August 2000 @ 9:20 am

7 days Est. End = Tuesday 10th August 1999 @ 9:20 am

It should also be noted that the Start Time and Finish Time assigned to the Calendar that Work Flow is using also has bearing on the calculation of estimate dates/times.

Example

If Calendar Start Time = 9:00 and End Time = 18:00 **and**
Estimate duration of task = 2 hours

Task is started at 17:30:00.

The Estimated end will be tomorrow @ 10:30:00

Linking Tasks (Previous and Next Tasks)

When a Procedure is established you have the ability to nominate the relationship between Tasks. This allows you to set dependencies as to whether a particular task should be completed before another task is started. (This is referred to as Previous and Following/Next Tasks)

When a Task is completed that has a following/next Task nominated and that Task has an attribute of ‘Auto’ then that Task will be automatically started on completion of the previous task.

If a Task has an attribute of ‘User’ and has a previous Task assigned to it, then it may not be started by the User until all Previous Tasks have been completed. A message will be displayed to the User that previous Tasks have not been completed.

Task Security

The responsibilities system governs who has access to Tasks and what Work Flow functions the Officer may perform.

Each Task that is created is allocated, as a minimum, a Responsibility Structure and a Responsibility Group.

The following examples illustrate under what conditions a task may be maintained. The Responsibility Structure is established as follows:-

CEO Group John

MANAGR Group

Betty
David

INSP Group

Alan
Ken

Example 1

The MANAGR Group has been assigned and Betty has been nominated as the Responsible Officer to a Task.

If Betty tries to modify the task it will be maintainable and the authorised functions will then determine what Betty is allowed to do.
If David tries to modify the task it will be called in display mode.
If Alan tries to modify the task it will be called in display mode.
If Ken tries to modify the task it will be called in display mode.
If John tries to modify the task it will be maintainable and the authorised functions will then determine what John is allowed to do.

Example 2

The MANAGR Group is assigned to a Task. No Responsible Officer has been nominated.

If Betty tries to modify the task it will be maintainable and the authorised functions will establish what she is allowed to do. On maintaining the Task the Responsible Officer field will be automatically updated with Betty.

If David tries to modify the task it will be maintainable and the authorised functions will establish what he is allowed to do. On maintaining the Task the Responsible Officer field will be automatically updated with David.

If John tries to modify the task it will be maintainable and the authorised functions will establish what he is allowed to do. On maintaining the Task, if no Responsible Officer has been assigned then an error message will be displayed. The system will not automatically assign a Responsible Officer, as John is not contained within the MANAGR Group which is assigned to the Task.

If Ken tries to modify the task it will be called in display mode.
If Alan tries to modify the task it will be called in display mode.

Parameters

Work Flow is established at the individual application level. For example work flow is set up for Customer Service separately to work flow for Applications.

This enables greater flexibility and security within the work flow module.

The following topic is covered in this section:

System Parameters

System Parameters

For each Module that Work Flow is to be used for the parameters are set up individually. In the case of the Applications Module, Work Flow is established for each individual Class.

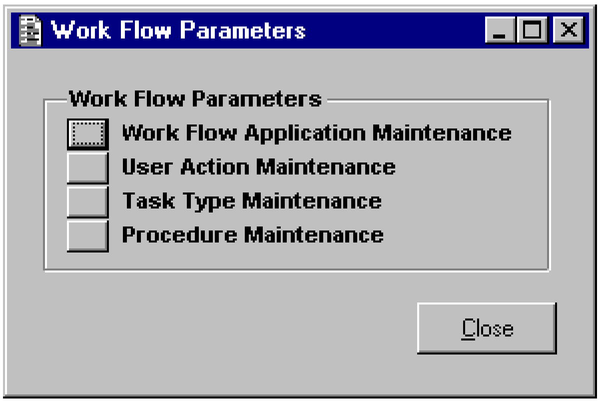
The following section describes the establishment of work flow for the Customer Service Module. It is laid out in the order in which you would typically set up the system.

Work Flow Parameters Form

This form is the driving form for establishment of the Work Flow parameters.

On the very first entry to the Work Flow parameters this form will be bypassed and the Work Flow Application Maintenance form will be presented automatically.

Each of the option buttons will take you to the appropriate parameter form.



Work Flow Parameters Form

Work Flow Application Maintenance
Pressing this button will present the Work Flow Application Maintenance form.

This form allows the establishment of system level Work Flow parameters for the module you are establishing work flow for e.g. Customer Service.

It defines some default settings for the module as well as the security.

User Action Maintenance
Pressing this button will present the User Action Maintenance form.

An Action is the smallest piece of work that the user may perform, such as printing a letter or sending e-mail.

Task Type Maintenance
Pressing this button will present the Task Type Maintenance form.

A Task is a logical piece of work that the user must perform. A Task may have many Actions recorded against it. A Task may be to ring a customer, close a call or send a notification letter.

Procedure Maintenance
Pressing this button will present the Procedure Maintenance form.

A Procedure is a logical grouping of Tasks. The Procedure simplifies the loading of Tasks onto a record, such as a Customer Request.

A Customer Request that is in regard to a barking dog would potentially require many Tasks to be loaded onto it. By establishing a Procedure at the parameter level and linking the Procedure to a Request Type the required tasks are loaded automatically onto the customer request record.

The Procedure also initially controls

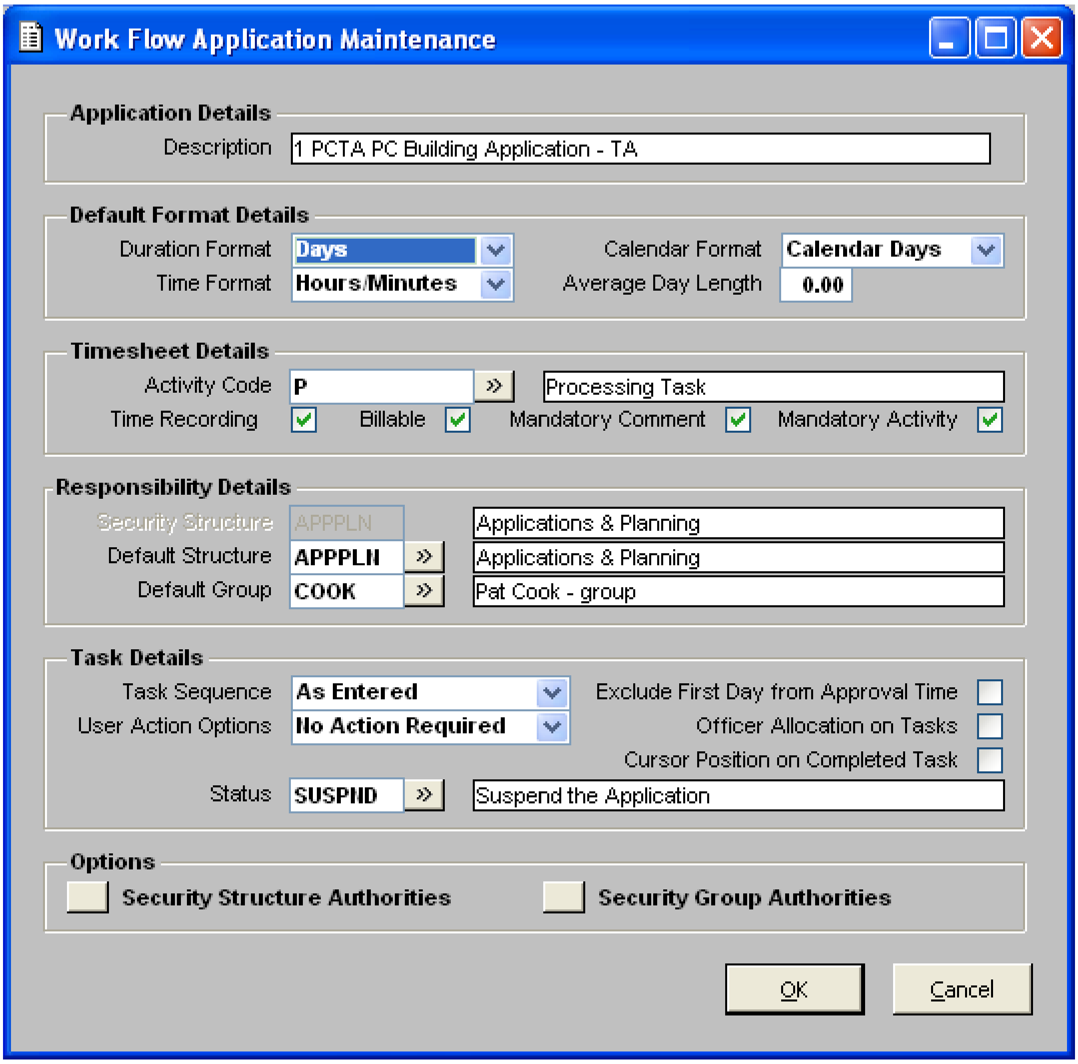
- The sequence in which the Tasks must be performed
- Dependencies between the Tasks (i.e. Task A must be completed before Task B can be started)
- How each of the Tasks are started (i.e. Manually by the User or Automatically on completion of the previous Task)

Work Flow Application Maintenance Form

This form allows the establishment of system level Work Flow parameters for the module you are establishing work flow for e.g. Customer Service, Application, Licensing.

It defines some default settings for the module as well as the security. Additionally if Timesheet Entry is required to be available for the module then the parameter needs to be flagged 'On' within this form.

NOTE: - The field 'Officer Allocation on Tasks' will only display if the Authorised Function has been activated within the System Parameters.



Work Flow Application Maintenance Form

Application Details – Description

This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

Default Format Details - Duration Format
This field contains the default setting for the duration format within work flow.

Where times are being recorded against tasks this field determines the default time format. This is a default setting only and the format may be overridden at any time.

Valid options are:-

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

Where Average Days is in use the Value in the Average Days parameter will be used in the calculation of time taken.

Default Format Details - Calendar Format
This field contains the default setting for the calendar format within work flow.

Where estimate times are being recorded against tasks this field determines whether all days are to be considered or just working days.

For example
If today is Wednesday and a task takes 5 days and the calendar format is set to **working days** then the task should be completed by next Tuesday (assuming that Saturday and Sunday are non-working days).

If today is Wednesday and a task takes 5 days and the calendar format is set to calendar days then the task should be completed by Sunday.

This is a default setting only and the format may be overridden at any time.

Default Format Details - Time Format
Where estimate and actual time spent against tasks is being entered this field controls the entry format.

Hours/Minutes
The entry will be made in hours and minutes e.g. 2.50 will be 2 hours and 50 minutes.

Decimal
The entry will be made in hours and decimal fractions of hours e.g. 2.50 will be 2 hours and 30 minutes.

Default Format Details - Average Day Length
The field is used by the Application and Licensing Approval Times report process. Average Day Length is not used in other Modules, for example in Customer Service.

Within Approval Times Calculations the Average Day Length is applied to Tasks that use the Working Days Format. The total hours of the Task is divided by the Average Day Length to calculate the number of days the Task took, to 2 decimal places.

If whole days are requires instead of hours in a day then this field should be left blank.

Timesheet Details – Activity Code
Setting the Activity Code defines a default activity to be applied to all User Action Timesheets for the Module.

Timesheet Details – Time Recording
If Timesheet Recording is required for the Workflow within the Module then this field should be flagged 'On'. When the Timesheet Recording field is flagged 'On' then the Billable and Activity Code fields are available for entry. If the field is flagged 'Off' then these fields are dimmed.

The Timesheet Recording field enables additional fields to be displayed as that Task can be defined as having Time Recording registered for them along with any billable information. If used within the Application / Licensing Modules than Fees can also be assigned to Tasks and these Fees added when the Task is performed within Maintenance of the Application / Licence.

Timesheet Details - Billable
Setting this field 'On' will then set on all new User Actions to Billable. This is a default setting for the Task.

Timesheet Details – Mandatory Comment
Setting this field 'On' will then force the entry of Comment details on a Timesheet Entry during Add Mode within the Module/Class where this flag has been set. .Note that this flag is not used when maintaining a Timesheet Entry hence the entry of the Comment field is not mandatory.

Timesheet Details – Mandatory Activity
Setting this field 'On' will then force the entry of the Activity details on a Timesheet Entry during Add Mode within the Module/Class where this flag has been set. .Note that this flag is not used when maintaining a Timesheet Entry hence the entry of the Activity field is not mandatory.

Security Structure

This field contains the name of the responsibility structure that governs the authorised functions for Work Flow within this specific module. (It does not determine which structures, groups and responsible officers are assigned to tasks.)

This Structure is application specific. For example, if you are setting up Work Flow in Licensing then this Structure must be a Licensing Structure, it cannot be a Customer Service Structure. This is because an officer may be authorised to Insert and Delete Tasks within Customer Service however you do not want them to Delete Tasks on a License record.

Authorised functions are:-

- Insert Task
- Delete Task
- Delete Tasks that have not been Started
- Repeat Task
- Allocate Officer
- Change Assigned Officer
- Insert Procedure
- Maintain Estimate Dates
- Maintain Actual Dates
- Maintain Task Properties
- Suspend Task
- Order Task

Example
As a minimum for customer service establish a Customer Service Structure that contains the Default User in one group and all Managers, Supervisors etc in another group.

Assign those authorised functions that everyone is allowed to perform to the group containing the Default User e.g. Insert Task, Repeat Task, and Insert Procedure.
Then assign all authorised functions to the Manager/Supervisor group.

Default Structure

This field contains the name of the default responsibility structure that will be used for assigning tasks to groups and officers. This is a default structure only and may be changed at the individual Task level.

Example
The default structure may be the Customer Service structure however some tasks will be assigned to groups and/or officers within another structure e.g. Health Licensing. When the Task Type parameter is established the Customer Service structure will be automatically assigned to the Task Type however this would be overridden at this stage by the Health Licensing structure.

This field is NOT mandatory.

Default Group

This field contains the name of the default Group (within the default structure) that will be used for assigning tasks to groups and/or officers. This is a default group only and may be changed at the individual Task level.

This field is NOT mandatory.

Task Details – Task Sequence
This parameter allows the user to nominate a preferred Task display order for each application that interfaces with Workflow. The options available in the drop down list are:

- As Entered
- Actual Start Date
- Estimated Start Date

<u>‘As Entered’</u>
This option shows the Tasks in the same order as defined on the associated Procedure if applicable, or as inserted/added individually, regardless of their Estimated or Actual Start Dates.

Tasks that are Inserted or Repeated will be sequenced within the existing Tasks as per the user’s response to the “*Do you want to link after the selected task or do nothing?*”, or the “*How would you like to link to the selected Task (After/Before/Neither)*”, dialog that is presented once a Task to insert has been selected. Selecting ‘After’ will place the inserted Task following the selected Task. Selecting ‘Before’ will place the inserted Task prior to the selected task. Selecting ‘Nothing’ or ‘Neither’ will place the inserted Task prior to the selected Task in this case.

Tasks displayed using this sequence could appear to be ‘out of order’ with respect to their linking to one another, Estimated or Actual Start Dates, and durations.

<u>‘Actual Start Date’ (Default)</u>
This option shows the Tasks in the order of their Actual Start Date/Time. If a task has not been started, then the Estimated Start Date/Time will be used. This option most closely resembles the current ordering, and will still result in some ‘re-ordering’ of the display sequence as Start Dates change. Tasks that are ‘Inserted’ or ‘Repeated’ will be sequenced based on their derived Estimated Start Dates.

<u>‘Estimated Start date’</u>
This option shows the Tasks in the order of their Estimated Start Date/Time. Tasks that are ‘Inserted’ or ‘Repeated’ will be sequenced based on their derived Estimated Start Dates.

(further details in Troubleshooting section (178))

Task Details – User Action Options
The User Action Options parameter is used to control the processing of Tasks once all the ‘Actions’ have been completed for the Task.

This is set at the Workflow Parameter level but can be overridden at a Task Type level. The default value of the Workflow Parameter level is ‘No Action Required’ but this can be changed.

The available options for the ‘User Action Option’ are:-
- No Action Required (default setting)
- Complete a Task
- Confirm Completion

The processes that are performed depending on the setting are:-

No Action Required
When a Task is started and all User Actions are processed then no End Task is performed

Complete a Task
When a Task is started and all User Actions are processed then the End Task is performed.

Confirm Completion
When a Task is started and all User Actions are processed then a confirm completion message is displayed asking whether the User wants to complete the Task or not.

NOTE: When the Task has no User Action attached then no End Task is performed regardless of the value of the 'User Action Options'.

Additional functionality has been added for DRN 26870 for ePathway Lodgement only.

'Auto Start' tasks will now be allowed and initiated for ePathway lodgements using the following two methods only:

METHOD 1
Task Type Maintenance - **"User Action Options" set to "No Action Required**" AND all actions assigned to the Task Type are "non-interactive" in nature e.g. Change a Status.

METHOD 2
Task Type Maintenance - No Actions are assigned to the Task Type.

Note: The above is only relevant to ePathway. Pathway business rules will not be impacted.

Task Details – Exclude First day from Approval Time
When this flag has been set 'ON' for an Application Class, all Progress and Approval Time calculations on Applications for that Class will have one day added to the 'Start Date' of the calculations. This requirement is to address legislation in specific Local Government authorities. (**Note: this only applies for calculations in the Applications module).

If the flag is set off then calculations will use the normal calculation start date ie Task Start or Application Lodgement or Application date, depending on your use of authorised function and parameter settings.

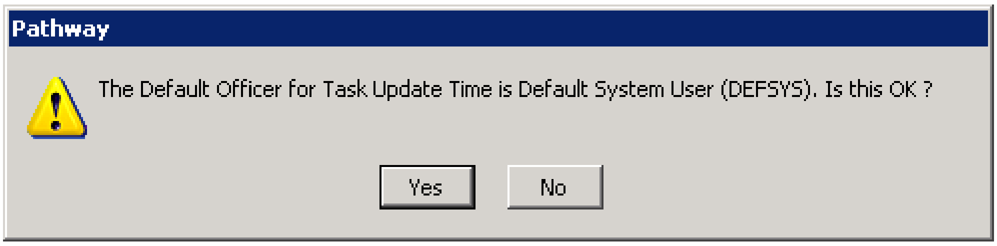
Task Details – Officer Allocation on Tasks
The 'Officer Allocation on Tasks' field will only display when the Authorised Function within the System Parameters has been activated.

When this field is left flagged 'OFF' then there is no change to the normal Workflow processing.

When this field is flagged 'ON' then the following applies:
- When inserting a new Workflow Task the Responsible Officer field will be set to blank.
- When the Task is started a Message will be displayed (see following for examples) asking if the Default Officer, either the Officer on the Task, or if it is blank, the logon User, should be used as the Responsible Officer of this Task.

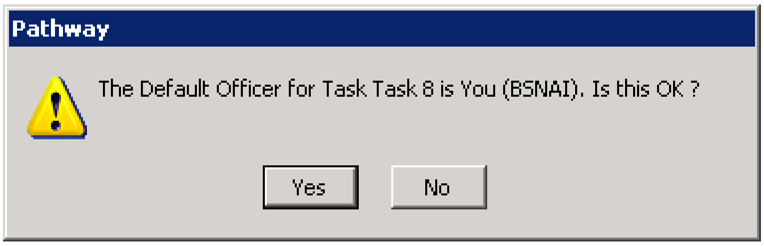
Examples:

Message when there is a Default Officer nominated within the Task Type Maintenance



-OR-

Message where there is NO Default Officer within the Task Type Maintenance for the Task



- If 'Yes' is selected, the User displayed in the Message will be used as the Responsible Officer on the Task.

- If 'No' is selected, a popup will appear to allow the selection of another User in the current Structure.

Note that where there is only one User in the Structure the Pop Up will not appear and that User will automatically be selected.

The same rules will apply when a Procedure is inserted.
- All Tasks, when initially inserted, will have the Responsible Officer set to blank.
- If the Task is Auto started then the above Pop Up is displayed
- If the Task is Auto started in batch mode, the Default User will be used.

Task Details – Cursor Positioned on Completed Task
When the 'Cursor Position on Completed Task' flag is turned 'On' the Task Summary form functions as follows: When a Task is completed, focus returns back to the *current* Task.

When the 'Cursor Position on Completed Task' flag is turned 'Off' the Task Summary form functions as follows: When a Task is completed, focus returns to the *next available* task.

This parameter setting will control the focus once in the Task Summary form. In the case where the user comes in to the form for the FIRST time, focus is always placed on the first incomplete task, irrespective of the parameter setting.

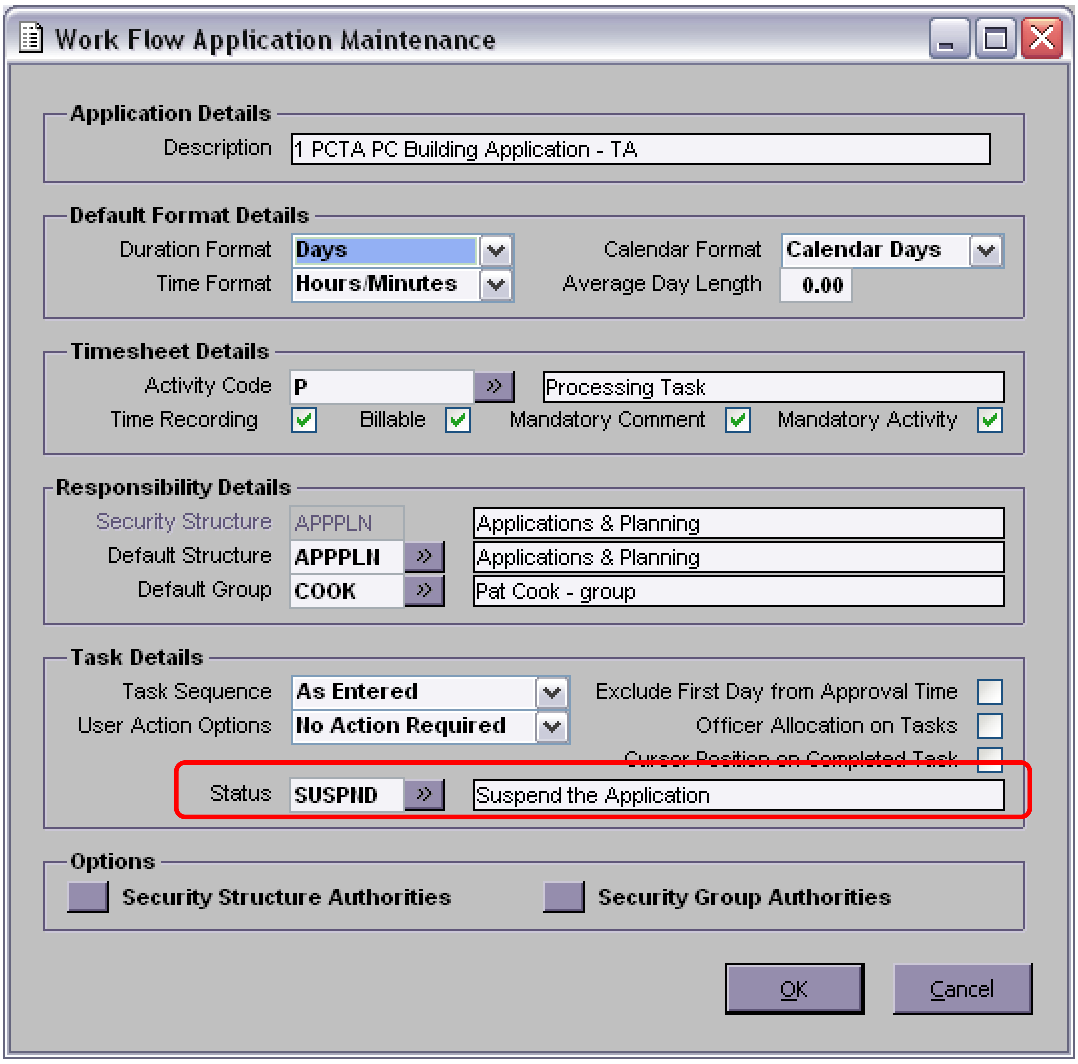
Task Details – Suspended Task Status
Allows the status of an Application to be changed based on a Task being suspended

SUSPENDED TASK UPDATE OF APPLICATIONS/LICENCES

The Status of an Application/licence can now be changed based on a Task being suspended and then having the original Status of Application/Licences be reverted to once the Suspension is removed or the Suspension date ends.

A new field 'Status' is available for Application Parameters on the Work Flow Application/Licence Maintenance form.

Application/Licence Parameters >> Workflow Parameters >> Workflow Application Maintenance



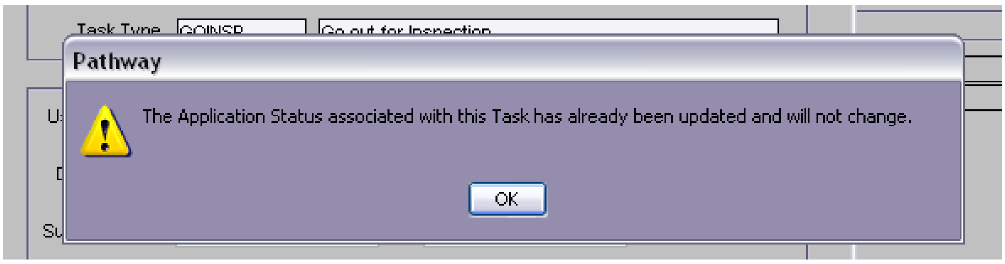
The Status codes available are those from the Status Codes via Application/Licencing Class Parameters.

When a Status Code has been selected and populates this parameter field, the following occurs.

Upon the entry of a Suspension on a Task, the Application/Licence Status is changed to that of the parameter setting. An Asynchronous Batch job is created to change the Application/Licence Status back once the Suspension is over.

When the Suspension is removed, changed to the past or ends, the Application/Licence Status reverts back to the previous Status before the Suspension was added.
The system stores the previous Status code prior to the Suspension being added.

If an additional workflow action that is to change the Status of an Application/Licence is actioned, then the user is presented with a warning advising that the Application/Licence Status is set to one that indicates a Task has been suspended and prevents the Status change from occurring.



Where a Status Code is NOT selected and the parameter field remains blank, the following occurs.

Upon the entry of a Suspension on a Task, the Application/Licence Status remains as it was.

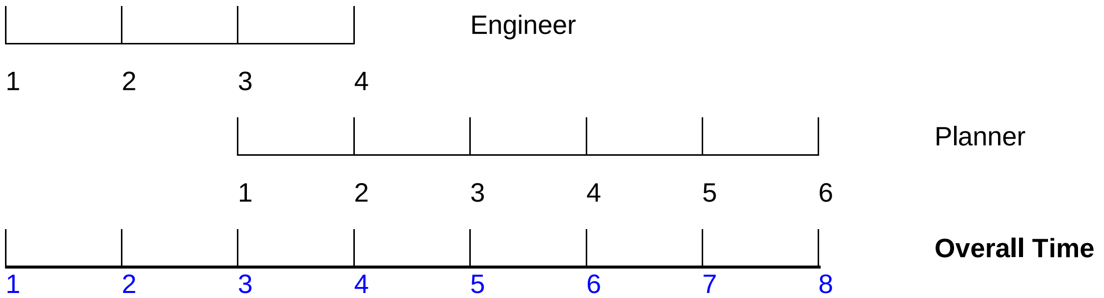
When the Suspension is removed or ends the Status does not change.

Where an additional workflow action that is to change the Status of the Application/Licence is invoked then the Status of the Application/Licence changes accordingly.

MULTIPLE AND OVERLAPPING SUSPENSIONS ON ANY ONE TASK

Pathway now allows multiple Suspension Records to be added to any one Task at a time and also allows overlapping Tasks.

The “stop the clock” time calculations for these overlapping tasks are the overall time – i.e. from the beginning of the first suspension to the end of the last suspension. An example is show below.



Security Structure Authorities Button
Pressing this button will present the Assign Task Authority Options form. The form is used to assign what authorised functions are permitted for the Work Flow system as a whole.

The form that will be presented is a Core Responsibility Form. Please refer to the Responsibility User Guide for more information on the use of the form.

Authorised functions are:-

Insert Task
This function allows for the insertion of additional tasks into a work procedure at the individual record level. For example against a particular Customer Service Request it may be necessary to add a specialised task that is not generally loaded as part of the normal procedure.

Delete Task
This function allows for the deletion of a task from a work procedure at the individual record level. For example against a particular Customer Service Request it may be necessary to delete a task that is not required for this request. Assigning this authorised function will give the user the authority to delete Tasks that have been Started.

Delete Tasks not Started
This function allows for the deletion of a task from a work procedure at the individual record level. Only deletion of Tasks that have **not** been Started is allowed.

Repeat Task
This function allows for the repeating of a task within a work procedure at the individual record level. For example repeating a site inspection. (Note that Insert Task works in a similar way to this function.)

Allocate Officer
This function allows for the allocation of an officer to a specific task where no officer has previously been assigned.

Change Assigned Officer
This function allows for the re-allocation of an officer to a specific task where an officer has previously been assigned.

☞ Please note that if a Task is Completed then authority to change responsible officer is not allowed. As a workaround to this you could remove the completed date on the task (providing you have “Maintain Actual Dates” authority) which would then change the status of the Task to incomplete.

Insert Procedure
This function allows for the addition of a procedure to a specific record. (A procedure is a logical group of tasks.)

Maintain Estimate Dates
This function allows for the modification (where necessary) of Estimated dates for an individual task. (The work flow system will automatically calculate Estimated dates when loading tasks.)

Maintain Actual Dates
This function allows for the modification (where necessary) of Actual dates for an individual task.

Maintain Task Properties
This authorised function controls the maintenance of the following fields on the Task.
Record Actual Time
Include in Total Time
Include in Approval Time
Charge Status
Calendar Format
Duration Format
Initiated

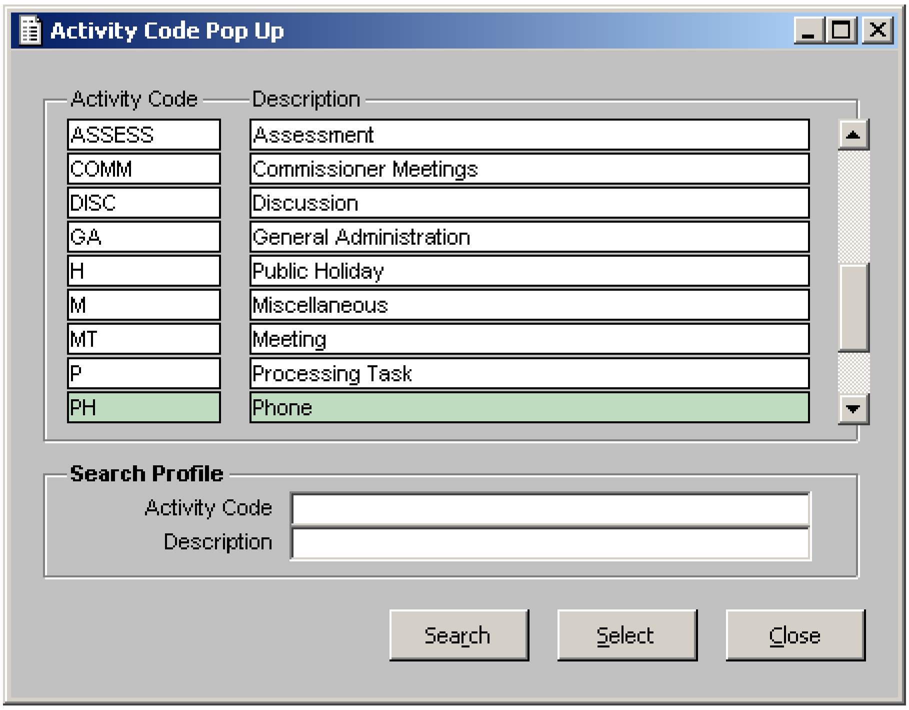
Security Group Authorities
Pressing this button will present the Responsibility Group Selection form. The form is used to assign what authorised functions are permitted for each individual group within the Responsibility Structure.

Only Authorised functions that have been selected via the Security Structure Authorities process will be available for assigning to a group.

The form that will be presented is a Core Responsibility Form. Please refer to the Responsibility User Guide for more information on the use of the form.

Activity Code Pop Up Form

This form is presented when the Activity Code Pop Up button is pressed.



Activity Code Pop Up Form

Activity Code / Description
The available Activity Codes are listed in this area.

Search Profile – Activity Code
If the Activity Code is not displayed then the Activity Code required (or part thereof) can be entered into the Search Profile and the search option selected. Wildcard searching is available in this field.

Search Profile – Description
If the Activity Description is not displayed then the Activity required (or part thereof) can be entered into the Search Profile and the search option selected. Wildcard searching is available in this field.

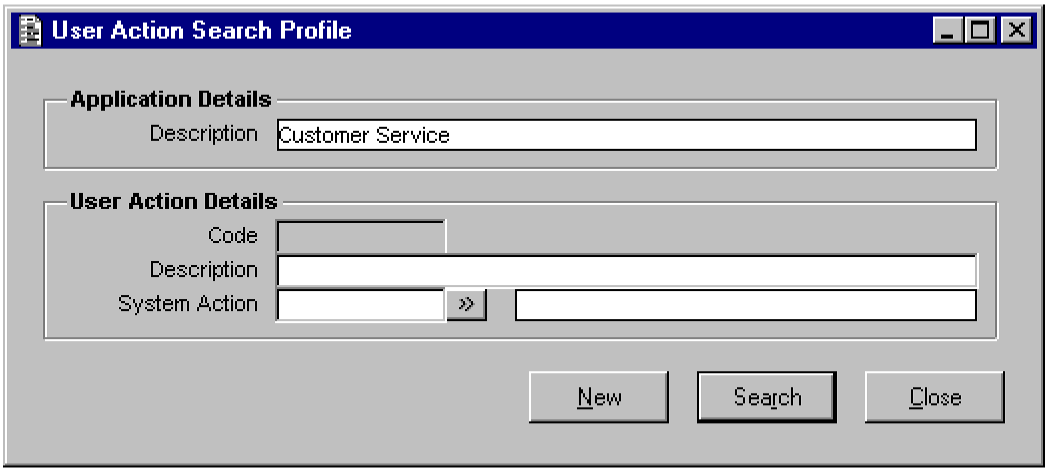
User Action Search Profile Form

This form is presented when the User Action Maintenance button is pressed on the Work Flow Parameters form.

It allows for the entry of search criteria for all Actions established in the system.

If no criteria are given and Search is pressed then all User Actions will be displayed.

New user actions may also be created from this form by pressing the New Button. (F9)



User Action Search Profile Form

Application Details – Description
This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

Code
Enter a code (or part thereof) on which to base your search. Full wild card searching is available on this field.

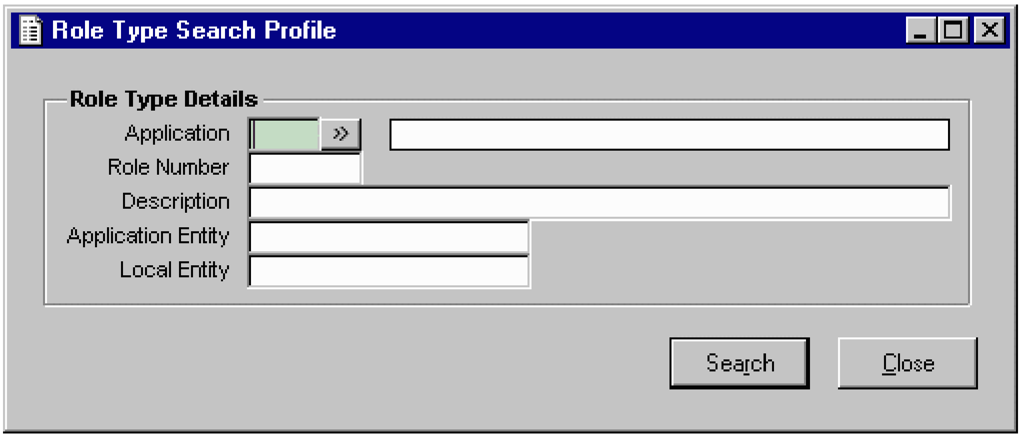
Description
Enter a description (or part thereof) on which to base your search. Full wild card searching is available on this field.

System Defined Action

Enter a valid System Action type or select from the Pop Up form by pressing the Pop Up button associated with the field if you wish to condition the search by action type. e.g. all Mail type actions.

Role Type Search Profile Form

This form is accessed via System Administration/Workflow Parameters, and is available in Internal or Customer mode. It allows entry of a search profile for Role Type Maintenance.



Role Type Search Profile Form

Application

An Application Code can be keyed in, or alternatively, one can be selected from the popup.

Role Number
Enter a Role Number on which to base your search. Wildcard searching is available on this field.

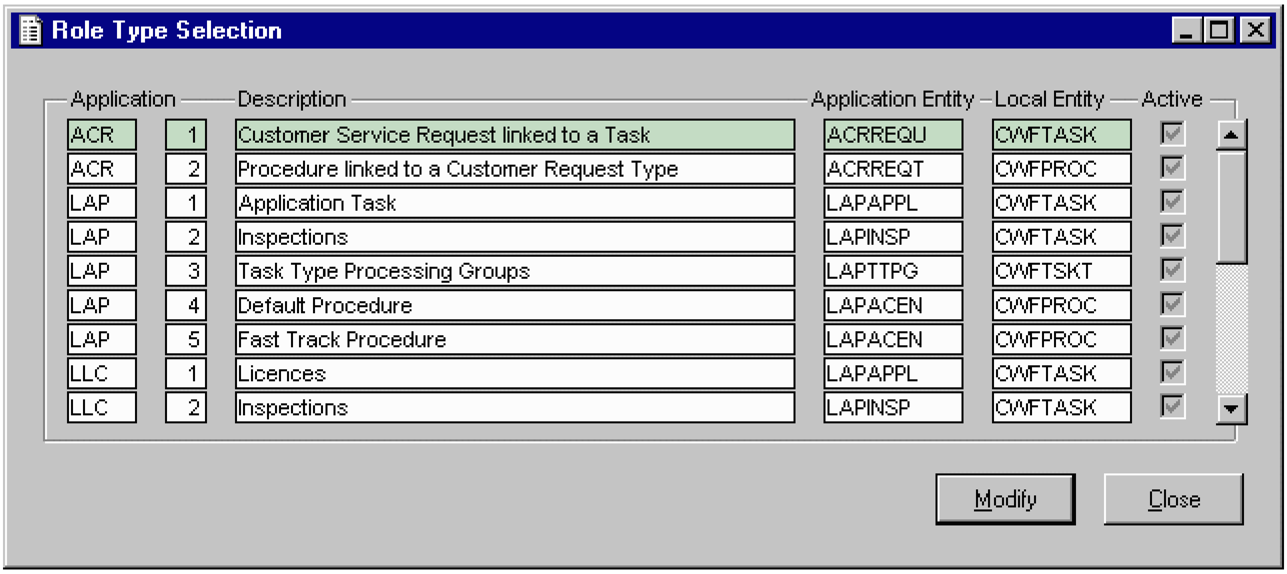
Description
Enter a Role Type Description on which to base your search. Wildcard searching is available on this field.

Application Entity
Enter an Application Entity on which to base your search. Wildcard searching is available on this field.

Local Entity
Enter a Local Entity on which to base your search. Wildcard searching is available on this field.

Role Type Selection Form

This form allows selection of a Role Type to maintain.



Role Type Selection Form

Application
These fields display the Application Code and the Role Number belonging to the Role Type.

Description
This filed displays a Description of the Role Type.

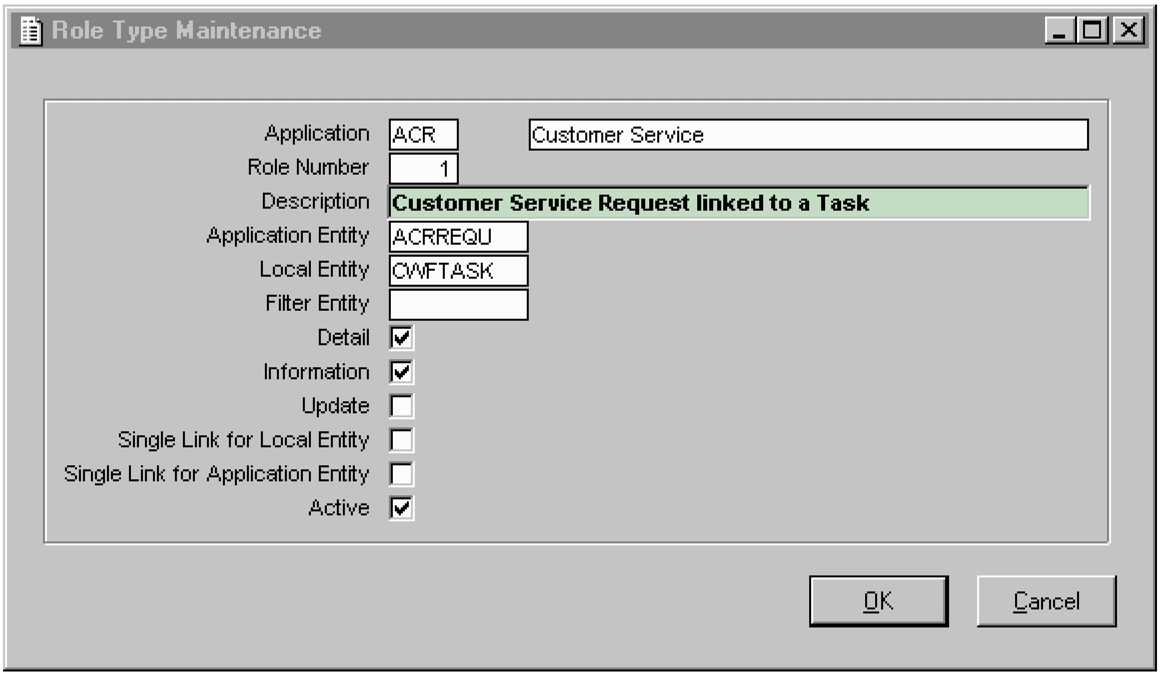
Application Entity
This field displays the Application Entity associated with the Role Type.

Local Entity
This field displays the Local Entity associated with the Role Type.

Active
This field displays whether record is active or not.

Role Type Maintenance Form

This form allows maintenance of the selected Role Type. In Customer mode, maintenance is only allowed on the Description field. All other fields are display only.



Role Type Maintenance Form

Application

These fields display the Application Code and Description details.

Role Number

This field displays the Role Number.

Description

This field allows the Role Type Description to be maintained.

Application Entity

This field displays the Application Entity associated with the Role Type.

Local Entity

This field displays the Local Entity associated with the Role Type.

Filter Entity

This field displays the Filter Entity associated with this Role Type.

Detail

Information

Update

Single Link For Local Entity

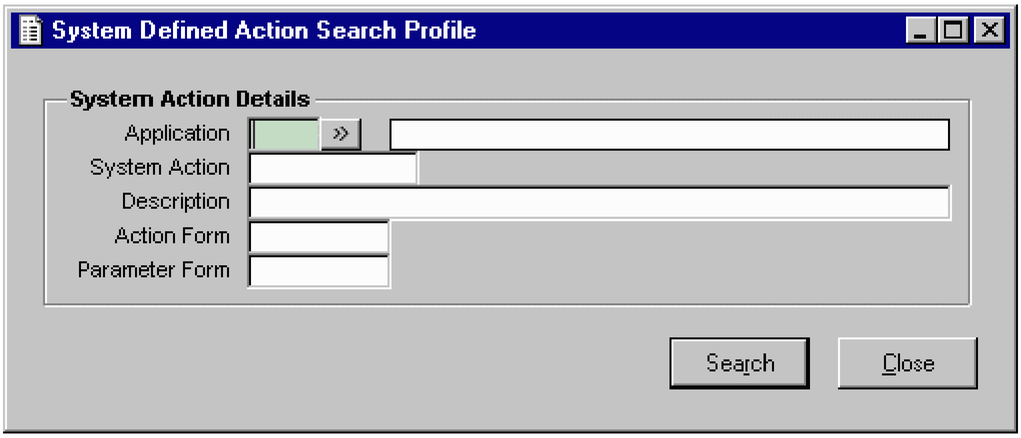
Single Link for Application Entity

Active

The Active flag will be checked on if this Role Type has been made available to the system.

System Defined Action Search Profile Form

This form allows a search profile to be entered on which to base a search for a System Defined Action.



System Defined Action Search Profile Form

Application

An Application Code can be keyed in or, alternatively, one can be selected from the pop up.

System Action

Enter a System Action on which to base your search. Wildcard searching is available on this field.

Description

Enter a System Defined Action Description on which to base your search. Wildcard searching is available on this field.

Action Form

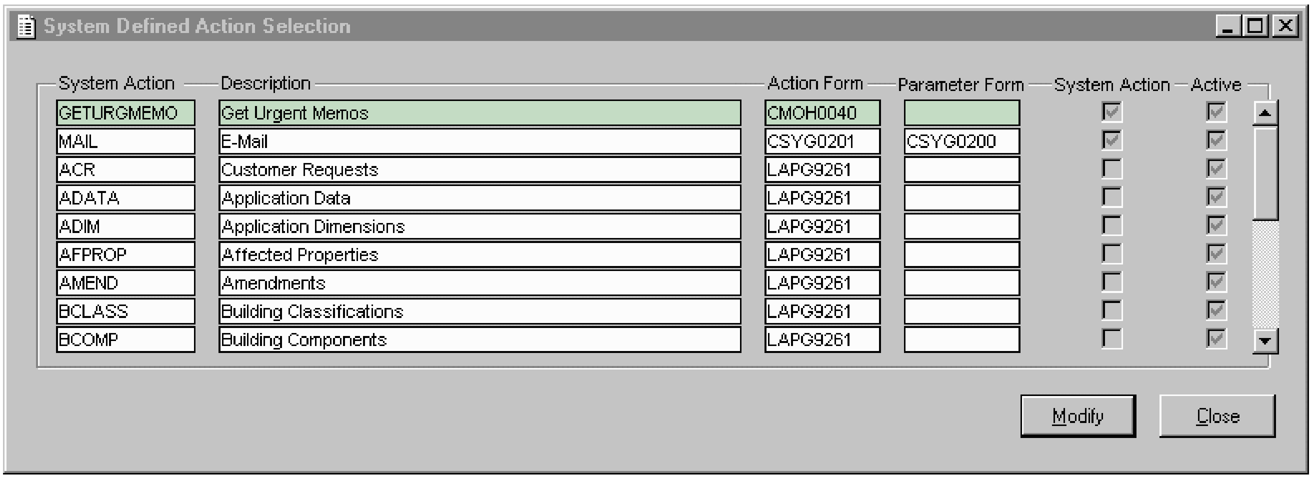
Enter an Action Form on which to base your search. Wildcard searching is available on this field.

Parameter Form

Enter a Parameter Form on which to base your search. Wildcard searching is available on this field.

System Defined Action Selection Form

This form allows selection of a System Defined Action to maintain.



System Defined Action Selection Form

System Action

This field displays the System Action Code. This field is display only.

Description

This field displays a Description of the System Action. This field is display only.

Action Form

This field displays the Action Form Associated with the System Defined Action.

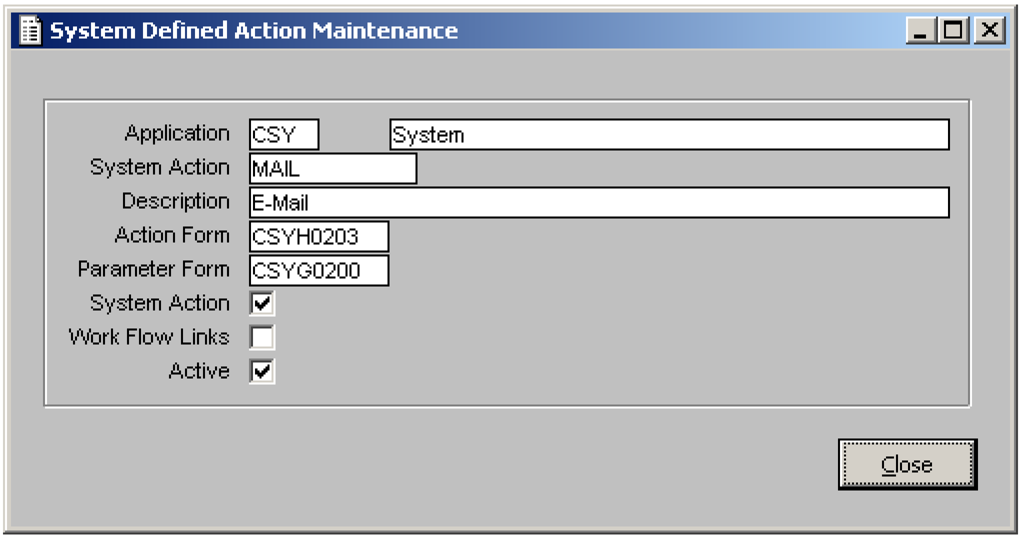
Parameter Form
This field displays the Parameter Form associated with the System Defined Action.

System Action
This field displays whether the record is a System Action or not.

Active
This field displays whether the record is active or not.

System Defined Action Maintenance Form

This form displays details of the selected System Defined Action. All fields are display only in Customer mode.



System Defined Action Maintenance Form

Application
These fields display the Application Code and Description. These fields cannot be maintained.

System Action
This field displays the System Action name. This field is display only and cannot be maintained.

Description
This field displays the System Action Description. This field is display only and cannot be maintained.

Action Form
This field displays the Action Form associated with this System Action. This field is display only and cannot be maintained.

Parameter Form
This field displays the Parameter Form associated with this System Action. This field is display only and cannot be maintained.

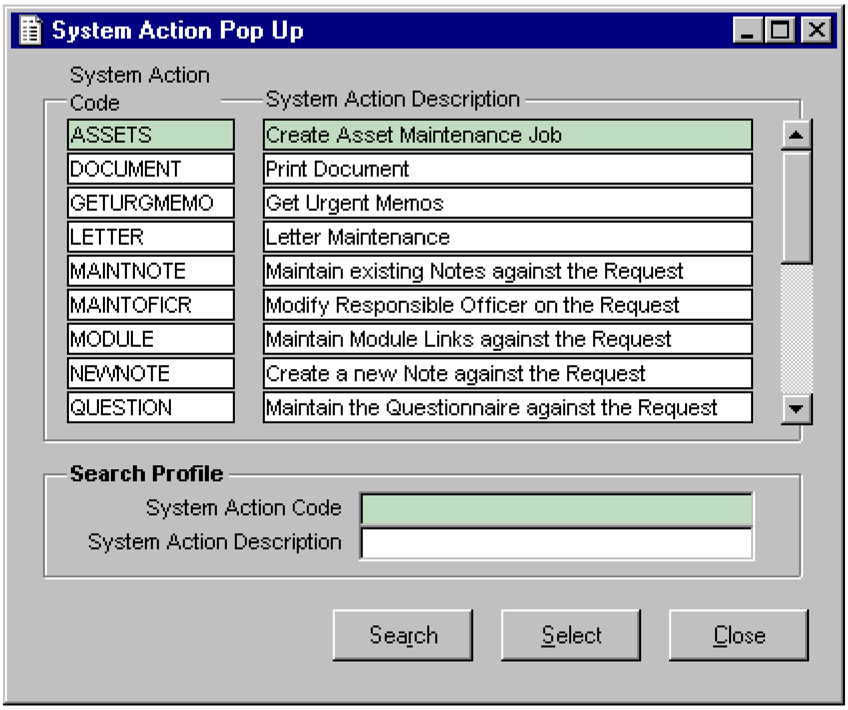
System Action

Workflow Links

Active
This flag will be checked on if this System Action has been made available to the system.

System Action Pop Up Form

This form displays all valid System Actions for the application you are establishing work flow for.



System Action Pop Up Form

The following System Actions are available in all modules using Workflow – Applications, Licensing, Property, Customer Service, and Bookings Management:

- GETURGMEMO – Get urgent memo
- GISDISPLAY – Display on GIS
- MAINTMEMO – Maintain Memos
- MAIL – E-mail
- WFQUESTION – Ask A Question

The following System Actions are only available in the Applications Module and Licensing Module:

- ACR – Customer Requests
- ADATA – Application/Licence Data
- ADIM – Application/Licence Dimensions
- CFO – Check Outstanding Fees – This action presents the user with the Check Outstanding Fees form. The user is unable to progress with the application until funds are allocated to the outstanding fees.
- CHGTYP – Change Application/Licence Type
- COND – Conditions
- CONS – Consents
- DECN – Decisions
- FEES – Fees
- INSP – Inspections
- INSPSE – Start/End Inspection Details
- LETER – Letters/Notices
- LETRSEND – Send Letter
- LIF – Infringements
- LOCN – Locations
- MAJMIN – Development/Licence Categories
- NAMES – Names
- REFS – References
- REGIST – Registers
- RELAP – Applications/Related Applications

- RESETC – Reset Cashier Warning Flag
- RESP – Correspondence Received/Responses
- SETC – Set Cashier Warning Flag
- STAT – Change Application/Licence Status
- WRKFLW – Workflow
- UPDTIMEATT – Update Time Attributes

The following System Actions are only available in the Licensing Module:

- FSI - Food Safety Information
- PURP – Purpose Codes
- TRFR – Transfers
- VEHC – Vehicle Details

The following System Actions are only available in the Application Module:

- ADDLPACERT – Add a Property Certificate
- AFPROP – Affected Properties
- AMEND – Amendments
- BCLASS – Building Classifications
- BCOMP – Building Components
- BDATA – Building Data
- CONT – Contribution Fees
- DDATA – Development Data
- DEVDEP – Development Departures
- EXTD – Extensions
- JOINT – Joint Applications
- MISCD – Miscellaneous Data
- PRCR – Permits and Certificates
- SDATA – Subdivision Data
- ZL – Zones and Land Uses

The following System Actions are only available in the Property Module:

- GISREF - Check GIS Reference
- LAN – Animals – Check
- LAP – Applications – Check
- LDR_BAL – Debtors – Check Balance
- LLC – Licensing – Check
- LRA_ARR – Rates Check - Arrangements
- LRA_ASSM – Rates – Check Assessment
- LRA_BAL – Rates – Check Balance
- LRA_DDBT – Rates – Check Direct Debits
- LRA_POST – Rates – Check Postponed
- LRA_REB – Rates – Check Rebates
- LRA_VAL – Rates – Check Valuation Type
- LWB_MET – Water – Check Meters
- SERV – Property – Check Services

The following System Actions are only available in the Customer Services Module:

- ASSETS – Create Asset Maintenance Job
- ASSOC – Display Child Associated Request Selection Form
- ASSOP – Display Parent Associated Request Selection Form
- DOCUMENT - Print Document
- LETTER - Letter Maintenance
- MAINTINSP – Maintain Inspections attached to a Request
- MAINTNOTE – Maintain existing Notes against the Request
- MAINTOFICR – Modify Responsible Officer on the Request
- MAINTRESPO – Modify Responsible Officer on a Request
- MNTPP – Display Policy & Procedure Documents
- MODULE – Maintain Module Links against the Request
- NEWNOTE – Create a new Note against the Request
- NEWREFR – Create New Reference

- PRIORITY – Modify Request Priority
- QUESTION – Maintain the Questionnaire against the Request
- REFERENCE – Maintain References against the Request
- STATUS – Modify the Status on the Request
- VIEWASSET – View Asset Associated with a Request
- VIEWLETTER – View Letter attached to a Request

The following System Actions are available in New Zealand Valuations:

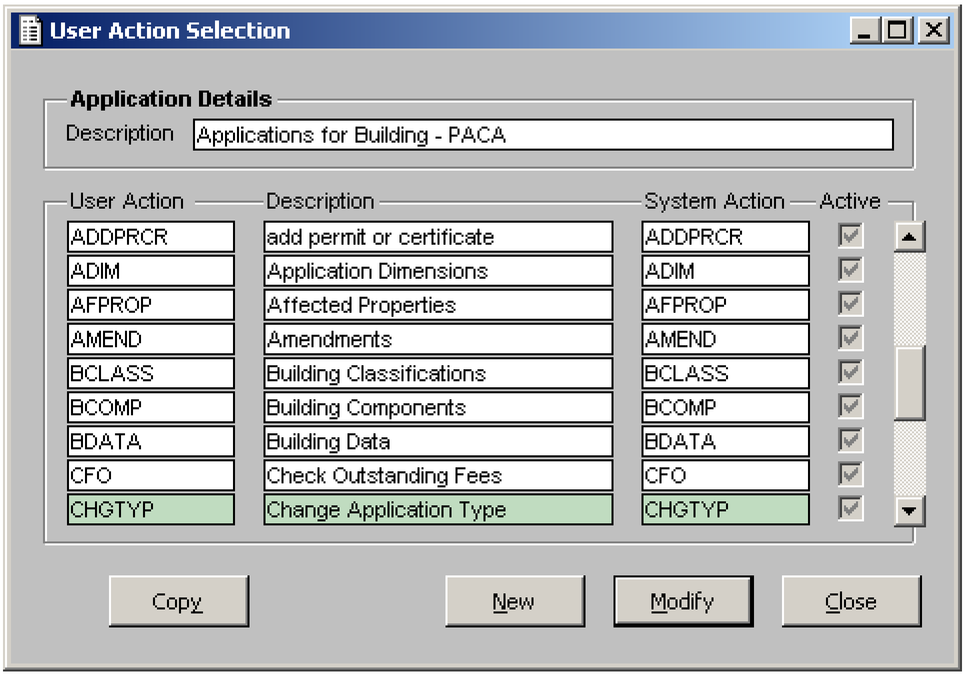
Code and Description
These fields contain the valid code and full description of system defined Action Types. These fields are display only and may not be maintained.

Search Profile - Code & Description
Where the required information is not displayed (i.e. the list is large) you may restrict the list by entry of values into these fields. Full wild card searching is available on these fields.

User Action Selection Form

This form is presented when more than one user actions match the search criteria entered.

From this form you may select a user action to modify by pressing the Modify Button or create a new action by pressing the New Button. If there is a need, the Copy Button can be selected to create copies of a selected User Action.



User Action Selection Form

Application Details – Description
This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

Code
This field contains the user defined code that has been assigned to the user action. This field is display only and may not be maintained.

Description
This field contains the full description that has been assigned to the user action. This field is display only and may not be maintained.

System Defined Action
This field contains the system action type that has been assigned to the user action. This field is display only and may not be maintained.

Active
If this field is checked on then the Action is available for use within the system.

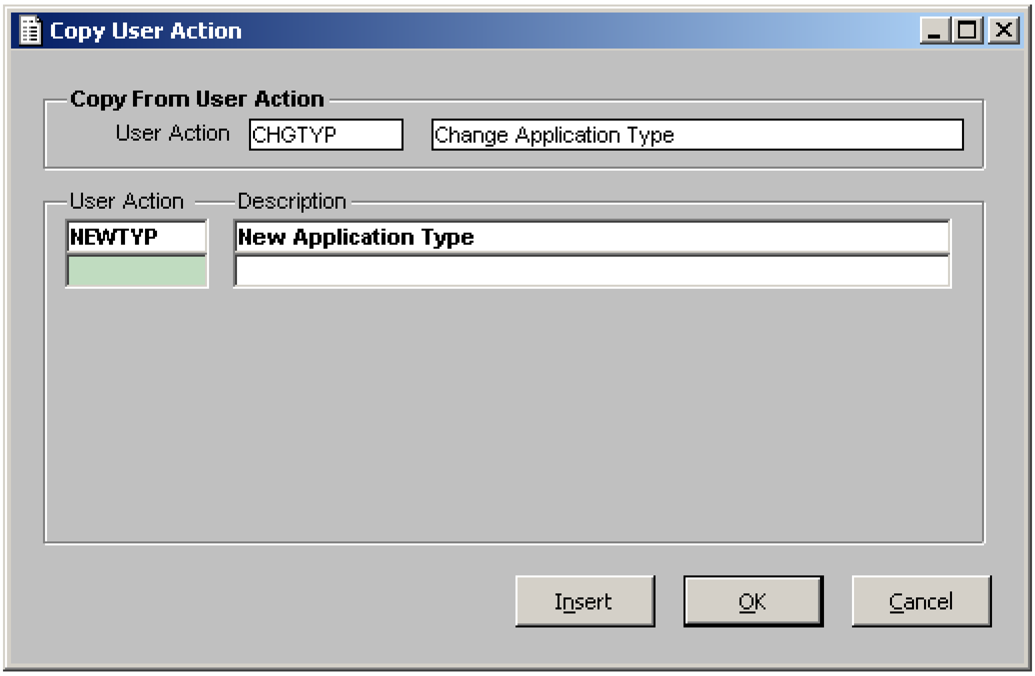
Copy
If the Copy Option Button is selected then the User Action currently in focus will be copied to create a new User Action(s) as defined on the Copy User Action Form.

Copy User Action Form

This form is presented when the Copy Button has been selected from the User Action Selection Form.

From this form you are able to create duplicates or copies of the nominated User Action. These are exact copies of the original User Action. These duplicates can then be modified if required. For example if the User Action for a Email has been copied then the copy may required the Subject section to be different to that of the original User Action.

It is possible to create more than one copy of the User Action by using the Insert Button to insert a new line for the additional User Action and Description.



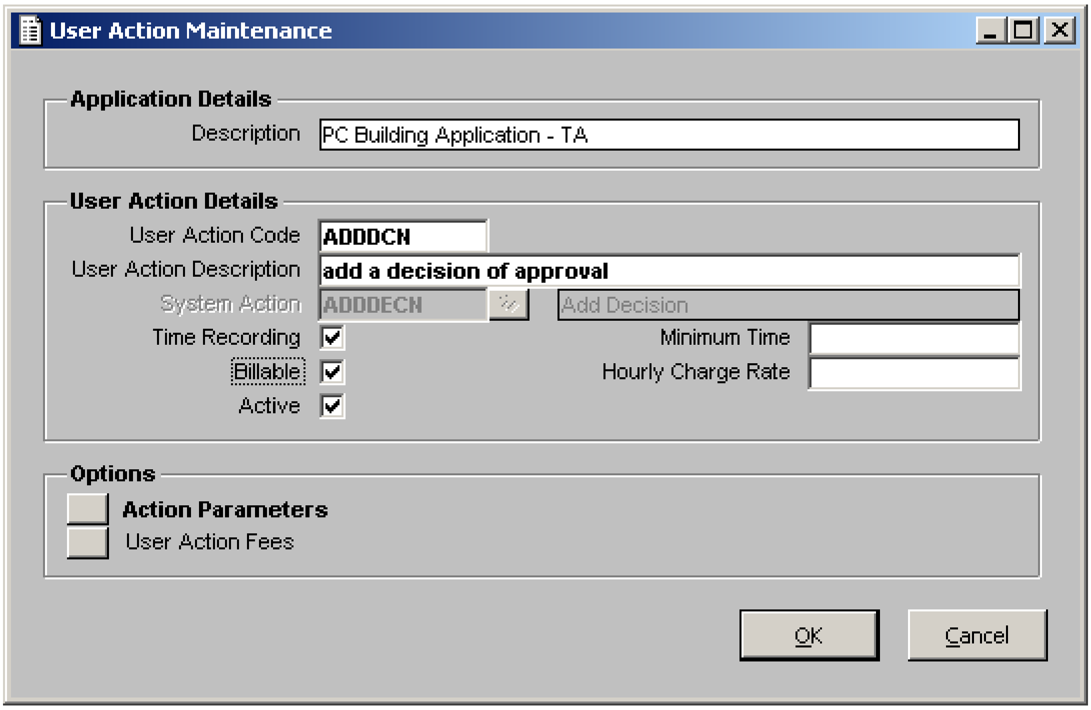
Copy User Action Form

Copy From User Action
The Copy from User Action field displays the User Action Code and Description that has been nominated as the User Action to be copied from.

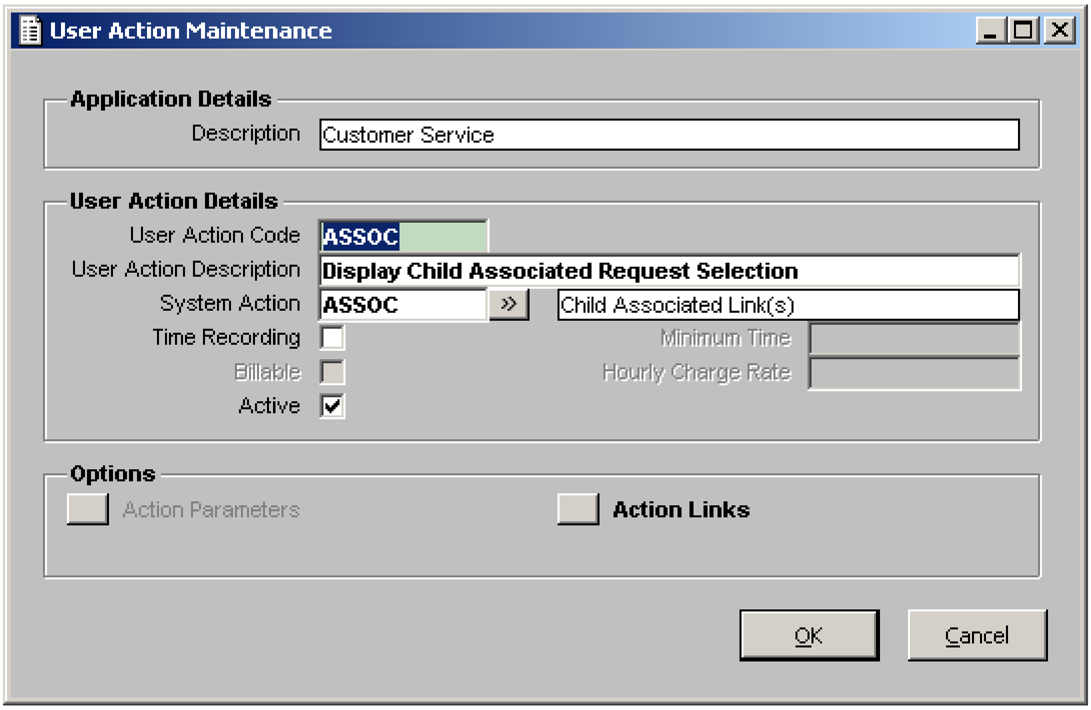
User Action / Description
The User Action and Description fields are use to nominate what the copied User Action is to become. Enter in the User Action Code and its Description and when the OK button is selected it will be used to created the new User Action from the Copy From User Action.

User Action Maintenance Form

This form allows for the entry, modification and deletion of user defined actions. All user defined actions are based on system action types.



User Action Maintenance Form



User Action Maintenance form showing Action Links button (used in Customer Service functions)

Application Details – Description
This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

Code
This field contains a unique ten character code for the User Action. This field is mandatory.

Description
This field contains a fifty character description for the User Action. This field is mandatory.

System Defined Action

Enter a valid system action type to associate to the user action type. Use the pop up button associated with the field to select via the System Action Pop Up Form. The full description of the system action type will be displayed.

Event and Facility Bookings System Actions

CREATELETT
This Action allows the user to select the persons to receive a letter, and then allows the selection and generation of the required letter. It allows selection of recipients from the Role Types currently linked to the Request (e.g. Customer, Affected Party etc).

NEWNOTE
This Action allows the user to create a new Note against the Booking, where note information is required to be recorded against the request.

MAINTNOTE
This Action presents all existing Notes against a Booking and allows the user to select a Note and perform any maintenance required.

UPTSTATUS
This Action allows the user to optionally nominate the Status to which the Request should be set. NOTE: The new Status will not be evident until the Booking Request is refreshed.

WFQUESTION
This Action allows questions and a selection of answers to be defined which will determine the particular Workflow Action that will be executed. This Action is also available to other modules. [See Workflow Question User Action]

Customer Service System Actions

ASSOP
This System Action Type will display the Parent Associated Request Selection form listing any Parent Associated Requests.

ASSOC
This System Action Type will display the Child Associated Request Selection form listing any Child Associated Requests.

ASSETS
This System Action Type will activate the Asset Maintenance interface to enable an Asset Maintenance Job to be processed for the record that the task is linked to.

The ASSETS System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action

DOCUMENT
This System Action Type will print a document. It will perform the same functionality as if the Action was performed manually on Request Maintenance (i.e. Selecting the Print Button on the Request Maintenance form).

The DOCUMENT System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action. A default Merge Type may be assigned to the User Action or the Merge Type can be left blank to allow a selection to be made from the available Merge Types.

LETTER
This System Action Type will allow for the automatic creation of a Letter. It will perform the same functionality as if the Action was performed manually by selecting The Create Letter Button on Request Maintenance.

The LETTER System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action. A default Merge Type may be assigned to the User Action or the Merge Type can be left blank to allow a selection to be made from the available Merge Types.

Note: A Name Module Link must exist on the Customer Request before this Action can be used. If there are no name links specified against the Request then this action will remain uncompleted

NEWNOTE
This System Action Type will automatically go to Note Maintenance or Note Selection to allow the addition of a new Note. It will perform the same functionality as if the Action was performed manually by selecting the Notes Button on Request Maintenance.

The NEWNOTE System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action. If a new Note is added and the author of the Note is not the Responsible Officer then the Responsible Officer will be sent an email to indicate that a new Note has been added.

Note: If the user cancels on the Note Maintenance form, the action will remain un completed.

MAINTNOTE
This System Action Type will automatically go to Request Note Selection to allow the maintenance of an existing Note. If no other Notes already exist, then this Action will display the Request Note Maintenance form to enable a new Note to be added. It will perform the same functionality as if the Action was performed manually by selecting the Notes Button on Request Maintenance.

The MAINTNOTE System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action. If a new Note is added and the author of the Note is not the Responsible Officer then the Responsible Officer will be sent an email to indicate that a new Note has been added.

NEWREFR
This System Action allows the creation of a New Reference It will perform the same functionality as if the Action was performed manually by selecting the Reference Button on Request Maintenance and then the Insert button.

REFERENCE
This System Action Type will automatically go to Reference Maintenance to allow the addition of a new Reference or maintenance of an existing Reference. It will perform the same functionality as if the Action was performed manually by selecting the Reference Button on Request Maintenance.

The REFERENCE System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

QUESTION
This System Action Type will automatically go to Question Maintenance to allow the maintenance of Questions and Answers. It will perform the same functionality as if the Action was performed manually by selecting the Questionnaire Button on Request Maintenance.

The QUESTION System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

Note: A Questionnaire needs to exist on the Request Type before this Action can be used. If there is no Questionnaire defined against the Request Type, the action will nevertheless complete.

MODULE
This System Action Type will automatically go to Module Links Maintenance to allow the maintenance of Module Links. It will perform the same functionality as if the Action was performed manually by selecting the Module Button on Request Maintenance.

The MODULE System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

Note: Module Links need to be defined on the Request Type before this Action can be used.

MAINTOFICR
This System Action Type will allow the maintenance of the Actioning Officer. It will perform the same functionality as if the Action was performed manually by selecting a Userid in the Actioning Officer field on Request Maintenance. A default Actioning Officer may be assigned to the User Action or the field can be left blank to allow a selection to be made from the Request Type Actioning Officer Pop Up or from the User Pop Up if no Actioning Officers have been set up for the Request Type.

The MAINTOFICR System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

Note: If no Actioning Officer is selected from the Pop Up, then the action will remain uncompleted.

MAINTRESPO
This System Action Type will allow the maintenance of the Responsible Officer. It will perform the same functionality as if the Action was performed manually by selecting a Userid in the Responsible Officer field on Request Maintenance. A default Responsible Officer may be assigned to the User Action or the field can be left blank to allow a selection to be made from the Request Type Responsible Officer Pop Up or from the User Pop Up if no Responsible Officers have been set up for the Request Type.

The MAINTRESPO System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

Note: If no Responsible Officer is selected from the Pop Up, then the action will remain uncompleted.

MAIL– also available in Applications/Licensing and Property Modules
This System Action type will allow for the automatic sending of e-mail where the User Action has been assigned to a Task. Press the Action Parameters Button to set up the e-mail record.

GETURGMEMO– also available in Applications/Licensing and Property Modules
Assigning this System Action type will, when a Task is started or completed, display any Urgent Memos for the record that the task is linked to.

MAINTMEMO– also available in Applications/Licensing and Property Modules
Assigning this System Action type will, when a Task is started or completed, display Memos for the record that the task is linked to. It will perform the same functionality as if the Action was performed manually by selecting the Associated menu and Memo option.

The MAINTMEMO System Action needs to be included in a User Action and assigned to a Workflow Task as a Start Action.

MNTPP
This System Action will display any Policy & Procedure documents linked to the Customer Request, and it will allow documents to be linked.

STATUS
This System Action Type will update the Status of the Customer Service Request. It will perform the same functionality as if the Action was performed manually by selecting the Request Status Pop Up on Request Maintenance. A default Status may be assigned to the User Action or the field can be left blank to allow a selection to be made from the Request Status Pop Up.

The STATUS System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

GISDISPLAY – also available in Applications/Licensing and Property Modules
This System Action Type will activate the GIS Interface and display the Property or Street/Suburb linked to the Request. It will perform the same functionality as if the Action was performed manually by selecting the GIS button on the Request Maintenance form.

The GISDISPLAY System Action needs to be included in a User Action and assigned to a Workflow Task as a Start Action.

Note: Module Links need to be defined on the Request Type before this Action can be used.

VIEWLETTER
This System Action allows the user to view all documents that have been created against the Customer Service Request (similar to the View Letter option from the Maintenance screen)

VIEWASSET
This System Action allows the user to view any Assets that have been linked to the Customer Service Request (similar to the 'Associated, Assets…' pull down option from the menu).

PRIORITY
This System Action can update the Priority level of a Customer Service Request.
When a user Action uses this System Action, where the default priority and override priority have been set at the parameter level, and the Customer Request matches the default priority, the Request will be updated with the override priority and the User Action will be completed. If there is no default and override priority setting at the parameter level, a Priority Selection form will display and allow the user to select the override priority. If a priority is selected, the customer request will be updated and the User Action will be completed. If there is no priority selected, the User Action will not be completed.

Applications System Actions

ACR – also available in the Licensing Module
This System Action Type will display the Request Enquiry. It will perform the same functionality as if the Action was performed manually by selecting the Link to Customer Requests option from the Application/Licence Summary.

The ACR System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

ADATA – also available in the Licensing Module
This System Action Type will display the Application Data Maintenance .to allow the maintenance or addition of Application Data. It will perform the same functionality as if the Action was performed manually by selecting the Application Data option from the Application/Licence Summary.

The ADATA System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

ADMIN – also available in the Licensing Module
This System Action Type will display the Dimensions Maintenance to allow for the addition of Application Dimension. It will perform the same functionality as if the Action was performed manually by selecting the Application Data option from the Application/Licence Summary.

The ADMIN System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

AFPROP
This System Action Type will display the Affected Properties Maintenance to allow for the insertion of Affected Properties or Other Interested Parties. It will perform the same functionality as if the Action was performed manually by selecting the Affected Properties option from the Application Summary.

The AFPROP System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

AMEND
This System Action Type will display the Amendments Maintenance to allow for the insertion of an Amendment record. It will perform the same functionality as if the Action was performed manually by selecting the Amendments option form the Application Summary.

The AMEND System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

ADDCOND - also available in the Licensing Module
This System Action enables Conditions to be created for an Application or Licence record when the Action is executed. This new Action provides Council with the ability to nominate multiple Condition Types for which the newly created Condition records will be based upon through its Add Condition Action Parameter Maintenance form.

ADDCONDECN - also available in the Licensing Module
This System Action enables Decision records to be created for Consents, of a specific Consent Type, linked to an Application or Licence. This new Action provides Council with the ability to nominate Consent Type and Decision Type parameters, which are used in creating Decision records (of the nominated Decision Type) for Consents (of the nominated Consent Type).

BCLASS
This System Action Type will display the Building Classifications Maintenance to allow for the maintenance of Building Classification data linked to the Application record. It will perform the same functionality as if the Action was performed manually by selecting the Building Classifications option from the Application Summary.

The BCLASS System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

BCOMP
This System Action Type will display the Building Components Maintenance to allow for the insertion and maintenance of the Building Components linked to the Application record. It will perform the same functionality as if the Action was performed manually by selecting the Building Components option from the Application Summary.

The BCOMP System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

BDATA
This System Action Type will display the Building Data Maintenance to allow for the maintenance of the Building Data linked to the Application record. It will perform the same functionality as if the Action was performed manually by selecting the Building Data option from the Application Summary.

The BDATA System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

CFO– also available in the Licensing Module
This System Action Type will display the Check O/S Fees, selecting the Modify Outstanding Fees option allows the fees to be modified. The User cannot proceed with the Task until fees are paid using either the Paid button on the Application Fees Maintenance or allocating funds from the Prepaid Allocation Option.

The CFO System Action needs to be included in a User Action and assigned to a Workflow Task as either a Start or End Action.

CHGTYP– also available in the Licensing Module
This System Action Type will display the Change Application Type Maintenance to allow for the Application record to be changed from the existing Type to any other Application Type available for selection from the Application Type Pop Up. It will perform the same functionality as if the Action was performed manually by selecting the Change Application Type option from the Application Summary.

The CHGTYP System Action needs to be included in a User Action and Assigned to a Workflow Task as either a Start or End Action.

ADDCLOCK – Adds a specified Clock(s) to an Application.

HOLDCLOCK – Allows a nominated Clock to be ‘Held’ with a specific Hold Reason.

MAINTCLOCK – Takes the user to the Clock Maintenance form.

STARTCLOCK – Allows for the starting of a nominated Clock.

STOPCLOCK – Allows for the 'Stopping' of a nominated Clock

UNHLDCLOCK – Allows for the releasing of a previously Held Clock.

HOLDCLOCK – Hold a Processing Clock
This System Action will Hold a Processing Clock as per the Action Parameters provided.

UPDTIMEATT
This System Action can update Time Attributes of a Task.
This Action allows the update of the following fields against a Task:
- Include in Approval
- Include in Total Actual

The Action provides two options:
- Reset Include in Approval
- Reset Include in Total Actual

If 'Reset Include in Approval' is checked on then the 'Include in Approval' flag will be checked off against Tasks.

If 'Reset Include in Total Actual' is checked on then the 'Include in total Actual' flag will be checked off against Tasks.

The following additional parameters will also be able to be set:
<u>Update all Completed Tasks</u> – If this is set on, then all tasks that have been completed will have 'Include in Approval Time', 'Include in Total Actual' set off.

<u>Update nominated Completed Tasks</u> – If this is set on, then all tasks for a specific Task Type that have been completed will have 'Include in Approval Time, 'Include in total Actual' set off based on the above indicators. This option allows users to nominate specific Task Types that will be used to update the relevant 'Time attributes'.

<u>Days since Lodgement</u> This will allow the user to nominate the number of days that will be used in determining whether the nominated Tasks will have the 'Time attributes' updated. The Lodgement Date will be sourced from the application that is being processed. The Workflow Calendar is used in determining the date that determines the 'Stop the Clock' date. The current system date (which is sourced from the PC that is executing the task) is used to calculate the duration since the Application was lodged. This is then used to determine whether or not tasks will have the 'Time attributes' reset.

<u>Calendar format</u> – This allows the user to nominate 'Working Days' or 'Calendar Days'. The default is Working Days. The Calendar format is used in determining the 'Stop the Clock' date.

<u>Debtors System Actions</u>

LDR_BAL
This action will prompt the User to check the Debtors Balance

<u>Property System Actions</u>

LPA_ASSOC
This action will prompt the user to check the Associated Properties

LPA_COND
This action will prompt the user to check the Property Conditions

LPA_GISREF

This action will prompt the user to check the GIS Reference

LPA_ODEBTS
This action will prompt the user to check the Other Property Related Debts

LPA_SERV
This action will prompt the user to check the Services assigned to a property

<u>Rates System Actions</u>

LRA_ARR
This action will prompt the user to check the Arrangements on an Assessment

LRA_ASSM
This action will prompt the user to check the Assessment

LRA_BAL
This action will prompt the user to check the Assessment Balance

LRA_DDBT
This action will prompt the user to check the Direct Debit on an Assessment

LRA_DRG
This action will prompt the user to check the Current Debt Recovery Group on the Assessment

LRA_NRR
This action will prompt the user to check the Non Rateable Reason on the Assessment

LRA_POST
This action will prompt the user to check Postponed Rates on the Assessment

LRA_REB
This action will prompt the user to check the Rebates on the Assessment

LRA_REL
This action will prompt the user to check the Related Assessments for the Assessment

LRA_VAL
This action will prompt the user to check the Valuation on the Assessment

<u>Water System Actions</u>

LWB_MET
This action will prompt the user to check the Water Meter

Time Recording

If Time Recording is to be collected for this User Action then this field needs to be set 'On'. Once flagged 'On' then the Minimum and Billable fields become available for the User to enter in information.

NOTE: The Time Recording and Billable Flags are defaulted from the Workflow Application Parameters but can be overridden.)

Minimum Time

The Minimum Time field is only available for entry once the Time Recording Option has been flagged 'On'. This is used to enter the default in the Minimum Time that is to be recorded for the User Task during Timesheet Entry.

The following is how the Minimum Time value will be defaulted at the time the Timesheet entry is being entered.

- If there is an entry in the Minimum Time field on the User Action form then it is defaulted in
- If there is no entry in the Minimum Time field on the User Action then the Minimum Time entered against the current User in the Responsibility Group of the Task will be defaulted in
- If there is no entry in the Minimum Time field for the User in the Responsibility Group of the Task then the Minimum Time field on the Workflow User Parameter will be defaulted in
- If there is no entry in the Minimum Time field on the Workflow User Parameter for the User then the field will be defaulted in as blank

Billable

The Billable field is only available for entry once the Time Recording Option has been flagged 'On'. When the Billable flag is set 'On' then the Hourly Charge Rate field becomes available for the User to enter in an Hourly Rate to be defaulted during Timesheet Entry of this Task.

NOTE: The Time Recording and Billable Flags are defaulted from the Workflow Application Parameters but can be overridden.)

Hourly Charge Rate

The Hourly Rate field is only available for entry on the Billable field has been set 'On'. When the Billable flag is set 'On' then the User can enter in the default Rate to be used during Timesheet Entry of this Task.

The following is how the Hourly Charge Rate will be defaulted at the time the Timesheet entry is being entered.

- If there is an entry in the Hourly Charge Rate field on the User Action form then it is defaulted in
- If there is no entry in the Hourly Charge Rate field on the User Action then the Hourly Charge Rate entered against the current User in the Responsibility Group of the Task will be defaulted in
- If there is no entry in the Hourly Charge Rate field for the User in the Responsibility Group of the Task then the Hourly Charge Rate field on the Workflow User Parameter will be defaulted in
- If there is no entry in the Hourly Charge Rate field on the Workflow User Parameter for the User then the field will be defaulted in as blank

Active Flag

If this flag is turned on then the user action type is available for use by the system.

If this flag is turned off then any records currently linked will remain unaffected however any new entries will not have this user action available for selection.

Action Parameters

The Action Parameters Option will become available depending on the System Action that has been selected. If there is a requirement to add further Parameters for the System Action to be performed then the User can select this option to set these Parameters up. For example if the MAIL System Action type is selected then pressing this button will present the E-mail Action Parameter Maintenance form.

User Action Fees

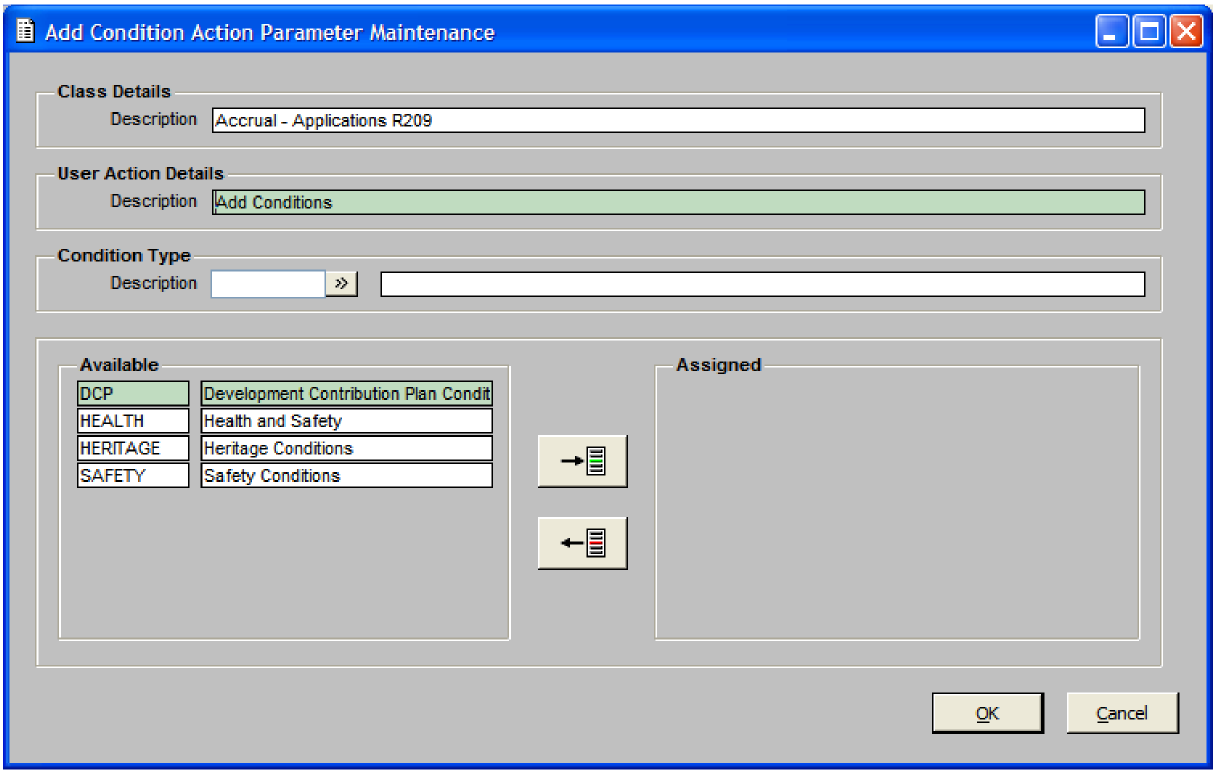
Selecting the User Action Fees Option allows the selection of the Timesheet Fees that are to be loaded when the Task has Timesheet information entered for it. This option is only available for the Application and Licensing Modules and where the Time Recording field is flagged 'On'.

Action Links Button

Selecting the Action Links button displays the User Action Link Maintenance form where email actions may be linked to be activated at the same time as the specified User Action.

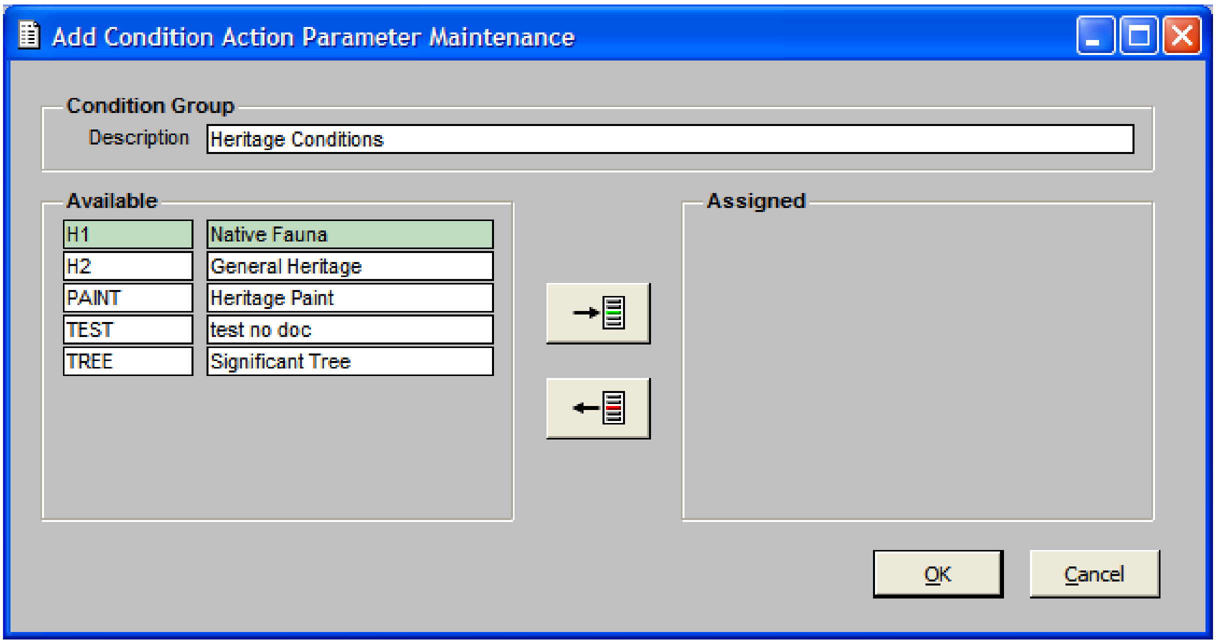
Add Condition Action Parameter Maintenance Form

A new action has been added to Pathway Workflow (as of Release 3.04) called 'Add Conditions'. This Action enables Conditions to be created for an Application or Licence record when the Action is executed. This new Action provides Council with the ability to nominate multiple Condition Types for which the newly created Condition records will be based upon through its Add Condition Action Parameter Maintenance form, as shown below.



Add Condition Action Parameter Maintenance form

The Add Condition Action Parameter Maintenance form allows Council to nominate a single Condition Type or multiple Condition Groups. The nominated values will be used in creating Conditions against an Application or Licence when the Workflow Action is executed. When a Condition Group is nominated, Council can detail out to a sub-ordinate parameter form to nominate the specific Condition Types for a Condition Group to be used in creating Condition records.

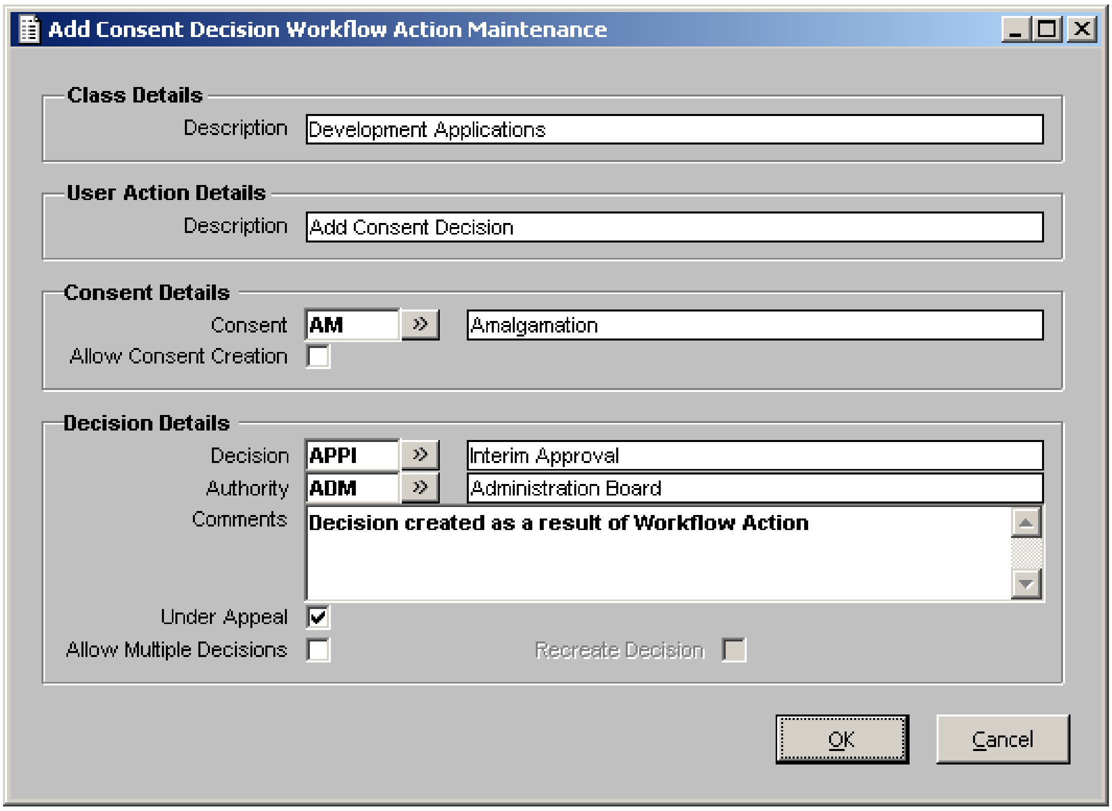


Add Condition Action Parameter Maintenance form

In the scenario where a Condition Group is nominated and no Condition Types have been selected for that Group, Condition records will be created for every Condition Type linked to that Group.

Add Consent Decision Workflow Action Maintenance Form

An enhancement has been made to Pathway Workflow (Release 3.04), where a new Workflow Action, Add Consent Decision, has been introduced. This Action enables Decision records to be created for Consents, of a specific Consent Type, linked to an Application or Licence. This new Action provides Council with the ability to nominate Consent Type and Decision Type parameters, which are used in creating Decision records (of the nominated Decision Type) for Consents (of the nominated Consent Type).



Add Consent Decision Workflow Action Maintenance form

Allow Consent Creation

The Allow Consent Creation parameter governs whether a new Consent record should be created when the Workflow Action is executed. This parameter is only applicable when a Consent, of the nominated Consent Type, is not linked to the Application or Licence the Workflow Action is executed for.

Allow Multiple Decisions

The Allow Multiple Decisions parameter enables Council to specify whether a Decision should be created for a Consent where Decisions already exist. When this parameter is de-activated, Decisions will not be created for Consents that have linked Decisions.

Recreate Decision

The Recreate Decision parameter enables Council to specify whether a Decision, of the nominated Decision Type, should be created if an existing Decision, of the same Type, is already linked to a Consent. This field is only available when the Allow Multiple Decisions parameter is activated.

Authority Type

The default Authority Type that will be assigned to newly created Decision records as a result of executing the Add Consent Decision Workflow Action.

Comments

The default Comments that will be assigned to newly created Decision records as a result of executing the Add Consent Decision Workflow Action.

Under Appeal

The default value that will be assigned to newly created Decision records as a result of executing the Add Consent Decision Workflow Action.

Add Processing Clocks Action Parameter Maintenance

This form allows for the nomination of Processing Clocks to be added to an Application.

If the Processing Clock nominated is already on the Application and is not Stopped then no action is performed.

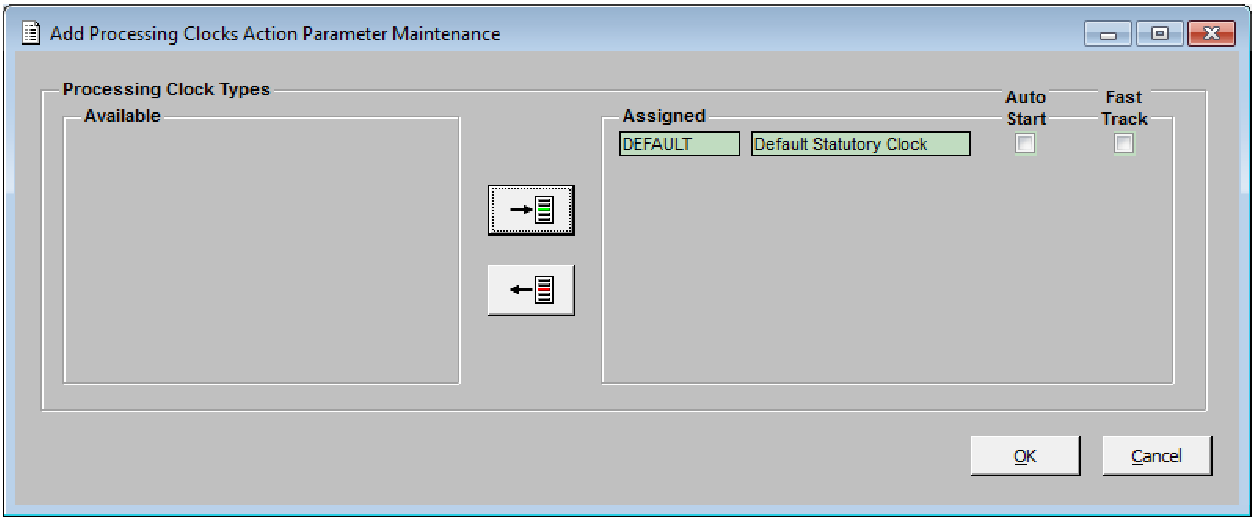
When the Clock/s are loaded the following occurs:

The Clock 'Status' is set to 'Not Started'

'Fast Track' is set to the 'Fast Track' parameter.

'Estimated Duration' is set to Estimated Duration from the Clock parameter – refer 'Fast Track Option'

To Start the Clock refer the Action 'Processing Clock – Start'



Available Processing Clock Type
This field defines the name of the Processing Clock that can be assigned.

All valid Clocks for this Application Class will be listed.

Assigned Processing Clock Type
This field defines the name of the Processing Clocks that have been assigned.

Clocks Assigned to the right hand column will be added to an Application when the User Action is run.

Auto Start
Set to 'OFF' to load the Clock(s) without Starting

Set to 'ON' to load the Clock(s) and Start

Fast Track
Set to 'OFF' to Start the Clock(s) with the 'Estimated Duration'

Set to 'ON' to Start the Clock(s) with the 'Estimated Duration (Fast Track)'

Hold Processing Clock Action Parameter Maintenance

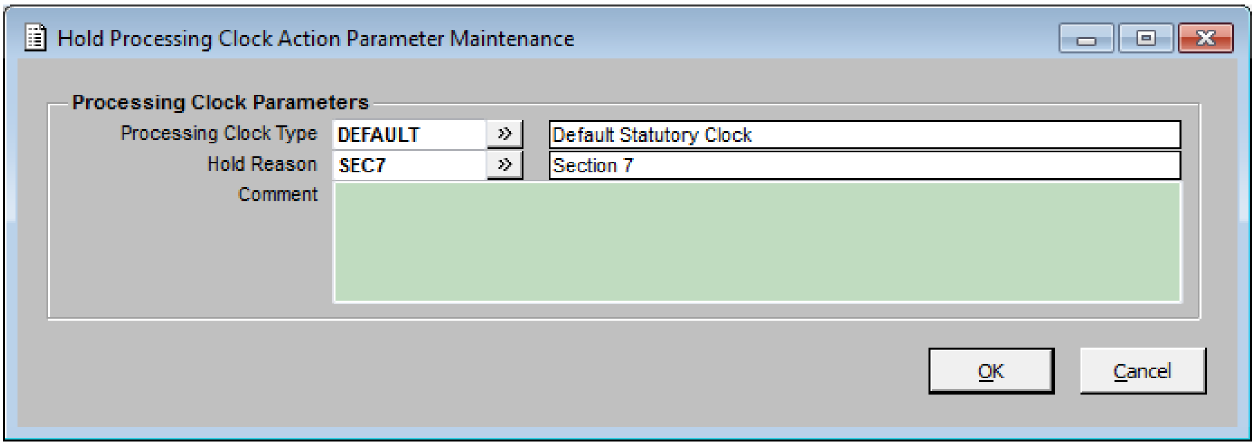
This form allows for the nomination of a Processing Clock to be Held and the Hold Reason.
A Processing Clock will be Held even if a Processing Clock is already being Held

If any Processing Clock is 'Stopped' then no action is applied.

The Hold Action creates a Hold Record against the Clock. Refer Hold parameters for further details.

The Status of the Clock is set to 'On Hold'.

A Processing Clock History record is created.



Processing Clock Type
This field defines the name of the Processing Clock to be Held. This field is mandatory.

Hold Reason
This field defines the Hold Reason. This field is mandatory.

Comment
This field contains a comment that will be written to the Hold record on the Clock. This field is mandatory.

Start Processing Clock Action Parameter Maintenance

This form allows for the nomination of a Processing Clock to be Started.

Ignores the selected Processing Clock if the select Processing Clock is not loaded

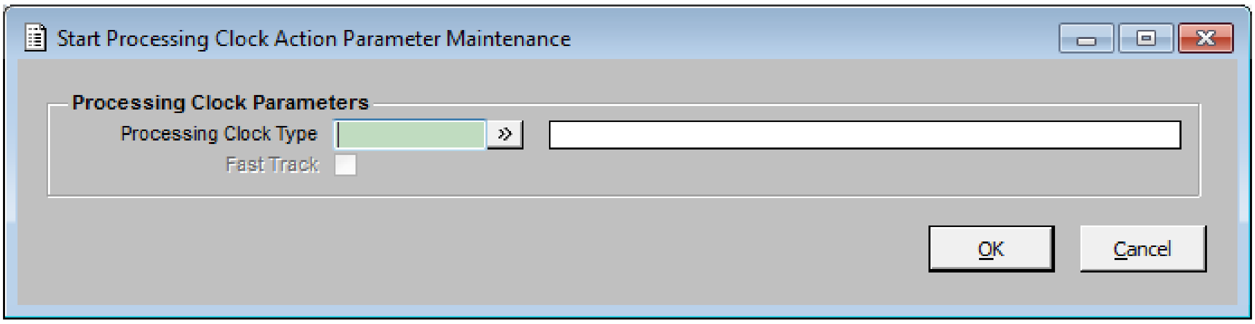
When the clock is started the following applies:

Clock Status is set to 'Processing'
Sets the 'Original Estimated Stopping Date' to the System Date/Time plus 'Estimated Duration.
Sets 'Started By' to the current User
A Processing Clock History record is created.

Setting the Started Date.

If the Processing Clock is linked to Applications and the Clock has been defined in the Application Class or Application Type parameters then the 'Started' date/time will be the Lodgement Date/Time or the Application Date as per those parameters.

Otherwise the System Date/Time will be used.



Processing Clock Type
This field defines the name of the Processing Clock to be Held. This field is mandatory.

Fast Track
This option is dimmed if the Processing Clock has no Fast Track Duration i.e. default to 'OFF'

Set to 'OFF' to Start the Clock with the 'Estimated Duration'

Set to 'ON' to Start the Clock with the 'Estimated Duration (Fast Track)'

Stop Processing Clock Action Parameter Maintenance

This form allows for the nomination of a Processing Clock to be Stopped.

If the Processing Clock has already been stopped then no processing is performed.

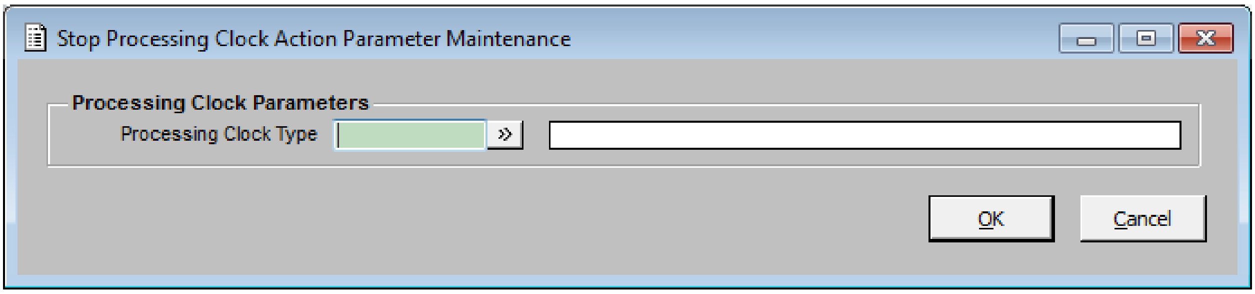
Stopping the Processing Clock updates the:

'Stopped' Date/Time of a Clock with the System Date/Time

Sets the Processing Clock Status to 'Stopped'

Creates a Processing Clock History record

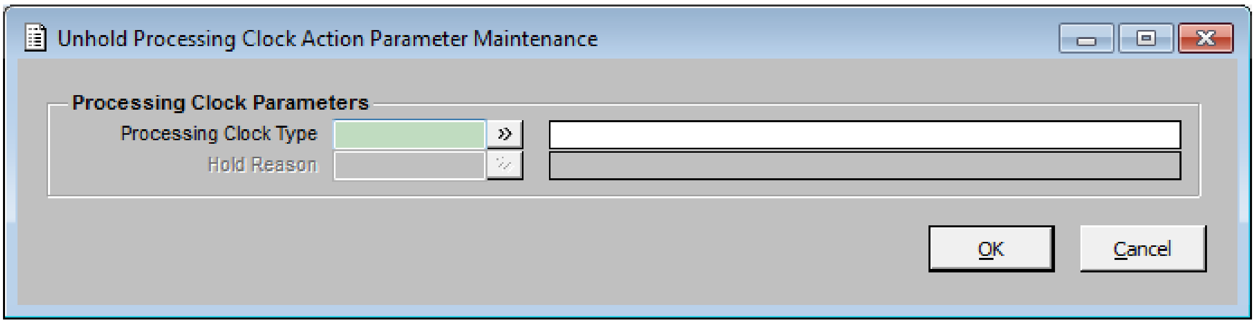
The Clock is 'refreshed' as it will no longer be included in the Batch Update function.



Processing Clock Type
This field defines the name of the Processing Clock to be Held. This field is mandatory.

UnHold Processing Clock Action Parameter Maintenance

This form allows for a previously ‘Held’ Clock to be released.



Processing Clock Type
This field defines the name of the Processing Clock to be Released. This field is mandatory.

Hold Reason
This field allows for a specific Hold Reason to be ended.

If a Held Reason is specified then only that Held Reason is ended.

If no Held Reason has been specified then all Held Reasons are ended.

If any Held Reason on a Processing Clock that is already ended will be ignored.

The ‘Hold To Date’ – Refer Hold parameter for further details

Create a Processing Clock History record

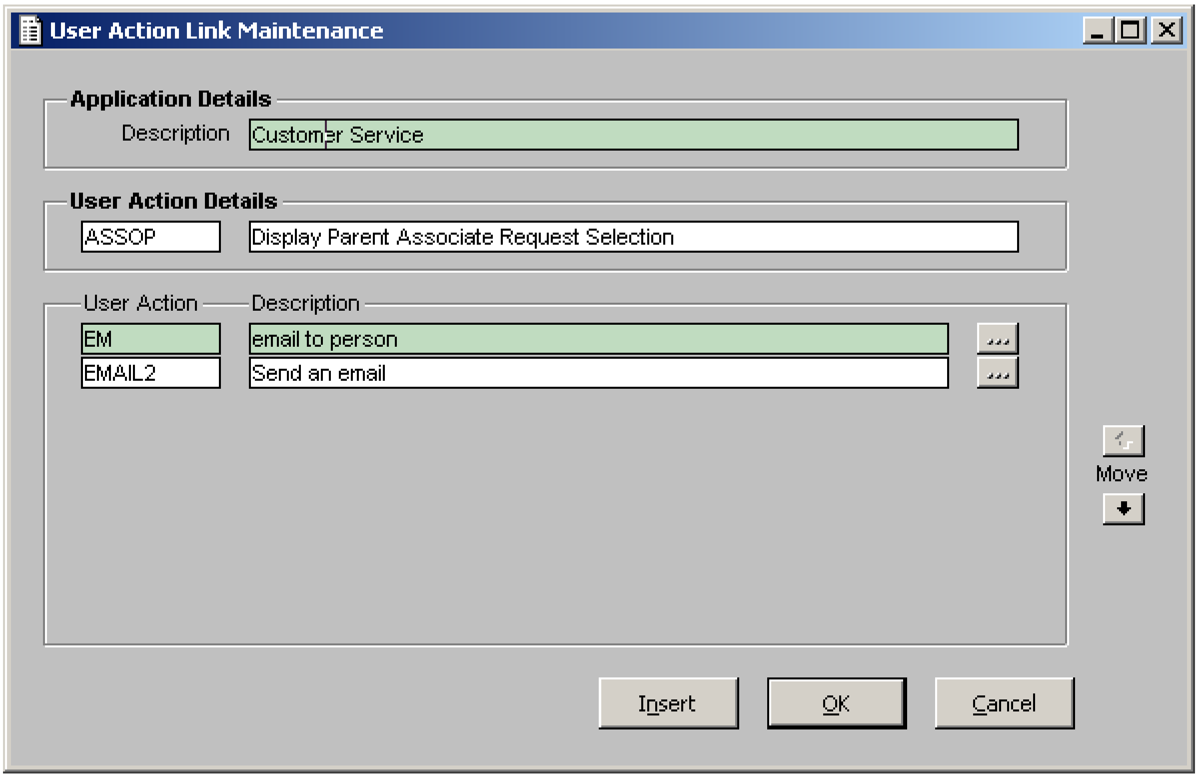
If the Held record did not hold the Clock then there is no reason to update the Clock

If there are still Processing Clock Holds running then there is no reason to update the Clock

Otherwise the Status of the Clock is set to ‘Processing’

User Action Link Maintenance Form

This form allows a User Action (email) to be linked to another User Action. When the first User Action is fired off, any email actions specified in this form will also be fired off.



User Action Link Maintenance Form

Application Details - Description
This field displays the Application details. This form is only currently used by the Customer Service Application.

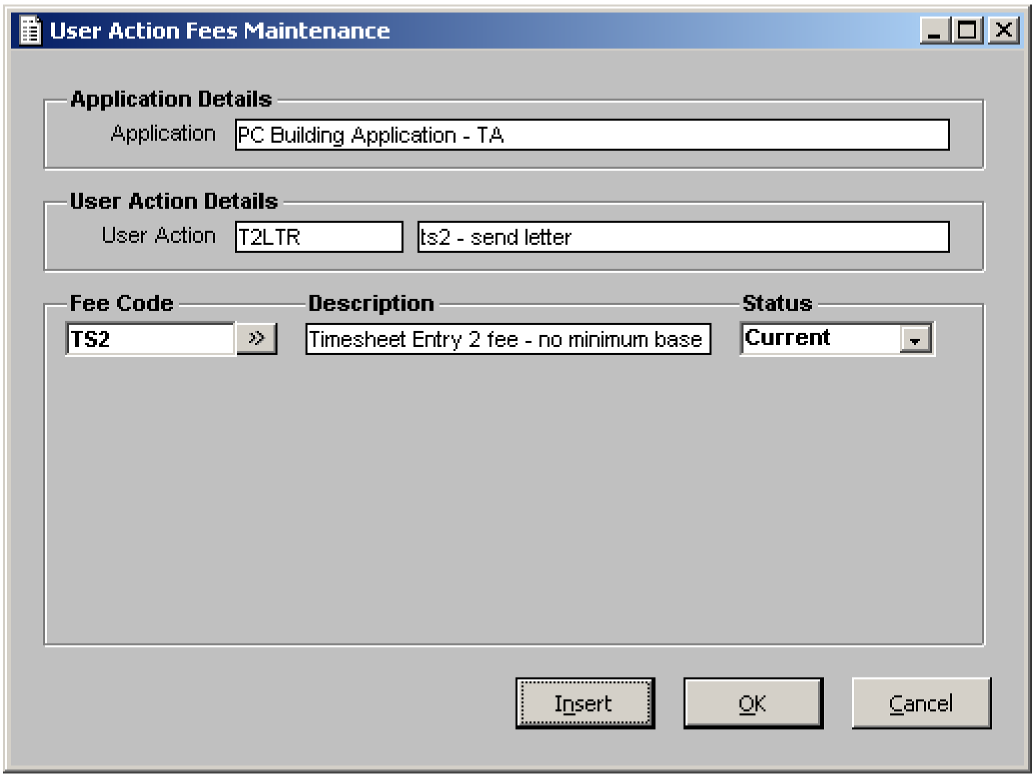
User Action Details
These fields display the User Action being maintained.

User Action / Description
This field allows an email User Action to be linked to the User Action being maintained. When the Insert button is selected the user is able to search for and select an email action from the pre-defined email user actions. The detail button allows display and maintenance of the linked user action.

User Action Fees Maintenance Form

The User Action Fees Maintenance Form allows the selection of the Timesheet Fees that are to be loaded when the Task has Timesheet information entered for it during Maintenance of an Application or Licence.

This option is only available for the Application and Licensing Modules where the Time Recording Flag is ‘On for the Action. Other Modules using Workflow cannot assign Timesheet fees.



User Action Fees Maintenance Form

Application Details – Application/Licence
The Application/Licence Class that the Workflow information is being setup for is displayed in this field.

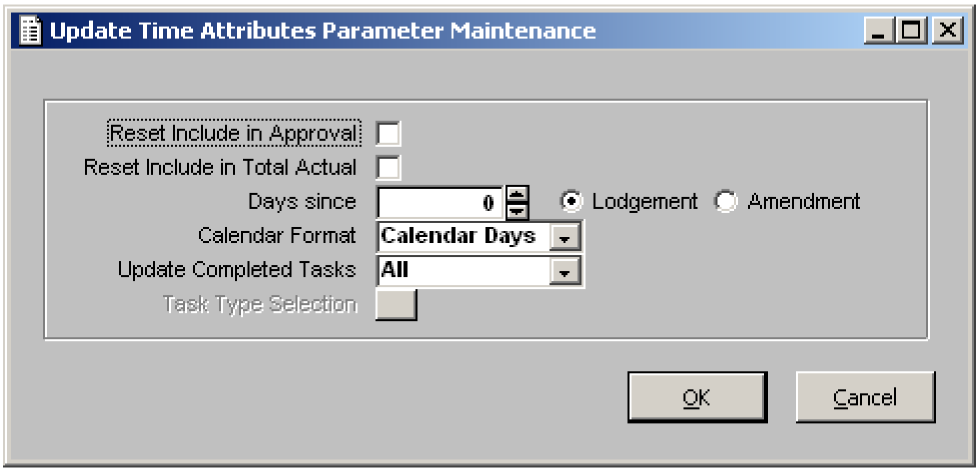
User Action Details – User Action
The User Action that has been selected is displayed in this field.

Fee Code & Description
The Timesheet Fee that has been assigned to the User Action is shown in this field along with its description.

Status
The Status field displays the status of the Timesheet fee for the User Action. The default option is Current but this can be changed to Proposed or Historic.

Update Time Attributes Parameter Maintenance Form

The Update Time Attributes User Action allows the clock on Tasks to be reset to zero based on the Lodgement Date or the latest Amendment date.



Update Time Attributes Parameter Maintenance Form

A new parameter has been introduced in the “Update Time Attributes Parameter Maintenance” screen (in Release 2.19 SP2) to allow for the selection between a “Lodgement Date” or the latest “Amendment Date” to be used to determine whether Tasks can be reset.

These checkboxes allow users to indicate if the Action is to be based on the Lodgement Date of an Application or the date of an Amendment Record. The default will be the Lodgement Date.

Users are also be able to choose the number of days to allow since the Lodgement/Amendment Date for processing the Action.

Users may set up a Workflow Task that can be inserted as required. This Task would have the user Actions of Amendments as well as the UPDTIMEATT action. Where an Amendment is required to be added to the Application, the Task should be inserted at the appropriate spot within the Workflow or the Application. When the Task is started, an Amendment recorded against the Application should be created. The UPDTIMEATT action would then be processed and the Amendment Date will be used instead of the Lodgement Date resulting in the resetting of the workflow clock to ‘0’ from that point.

Reset Include in Approval

If ‘Reset Include in Approval’ is checked on then ‘Include in Approval’ will be checked off against Tasks when the System Action UPDTIMEATT is run.

Reset Include in Total Actual

If ‘Reset Include in Total Actual’ is checked on then ‘Include in Total Actual’ will be checked off against Tasks when the System Action UPDTIMEATT is run.

Days since Lodgement/Amendment

This field allows the user to nominate the number of days that will be used in determining whether the nominated Tasks will have the ‘Time Attributes’ updated. The Checkboxes allow users to indicate if the Action is based on the Lodgement Date of an Application or the Date of an Amendment Record within the Applications Option. The Lodgement Date will be sourced from the Application that is being processed. The default will be the Lodgement Date. The Workflow calendar will be used in determining the date that determines the ‘Stop the Clock’ date. The current system date (which is sourced from the PC that is executing the Task) will be used to calculate the duration since the Application was lodged. This will then be used to determine whether or not the task will have the ‘Time attributes’ reset. (to be added to after testing)

Calendar Format

This allows the user to nominate ‘Working Days’ or ‘Calendar Days’. The default is ‘Working Days’. The Calendar format is used in determining the ‘Stop the Clock’ date.

Update Completed Tasks

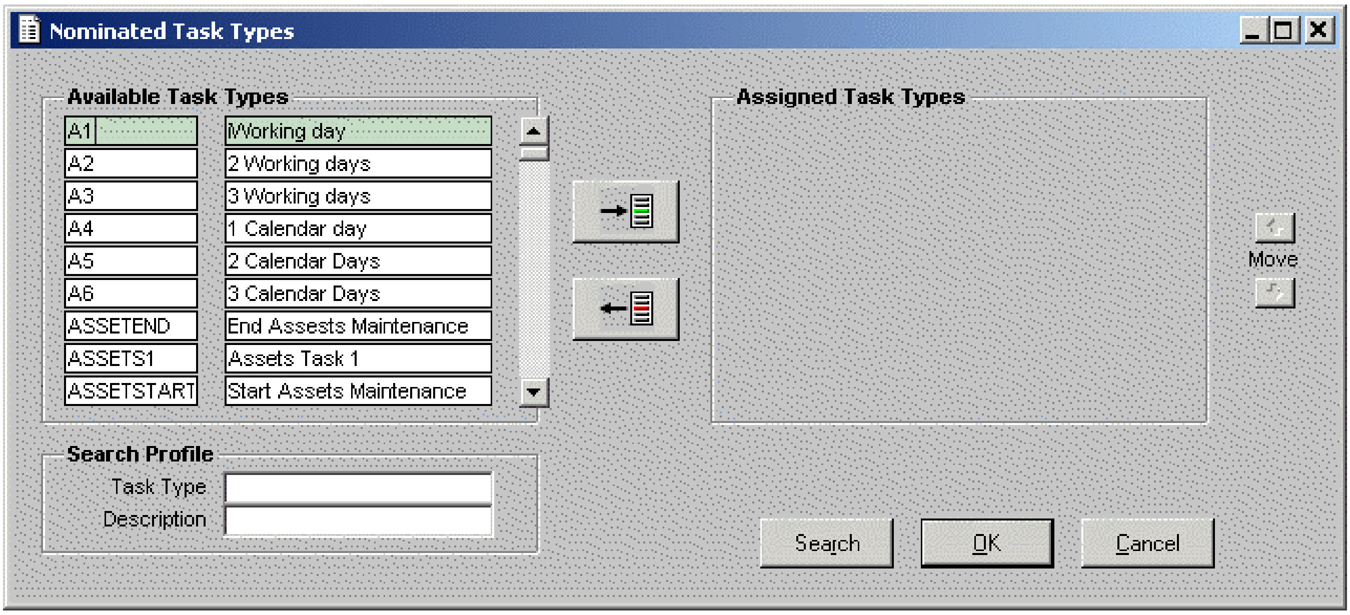
If ‘All’ is selected from the dropdown, then all tasks that have been completed will have ‘Include in Approval Time’ and ‘Include in total Actual’ set off.

If ‘Nominated’ is selected from the dropdown, then all tasks for a specific Task Type that have been completed will have ‘Include in Approval Time’ and ‘Include in Total Actual’ set off. This option allows users to nominate specific Task Types that will be used to update the relevant ‘Time attributes’.

Task Type Selection
Selection of this button displays the Nominated Task Types form which allows the user to select specific Task Types to be used with the ‘Update Completed Tasks’ option.

Nominated Task Types Form

Selection of the Task Type Selection button on the ‘Update Time Attributes Parameter Maintenance’ form displays the Nominated Task Types form which allows the user to select specific Task Types to be used with the ‘Update Completed Tasks’ option.



Nominated Task Types Form

Available Task Types
These fields display the Task Types which are available for selection. Click the Select or Remove buttons to select and remove Task Types.

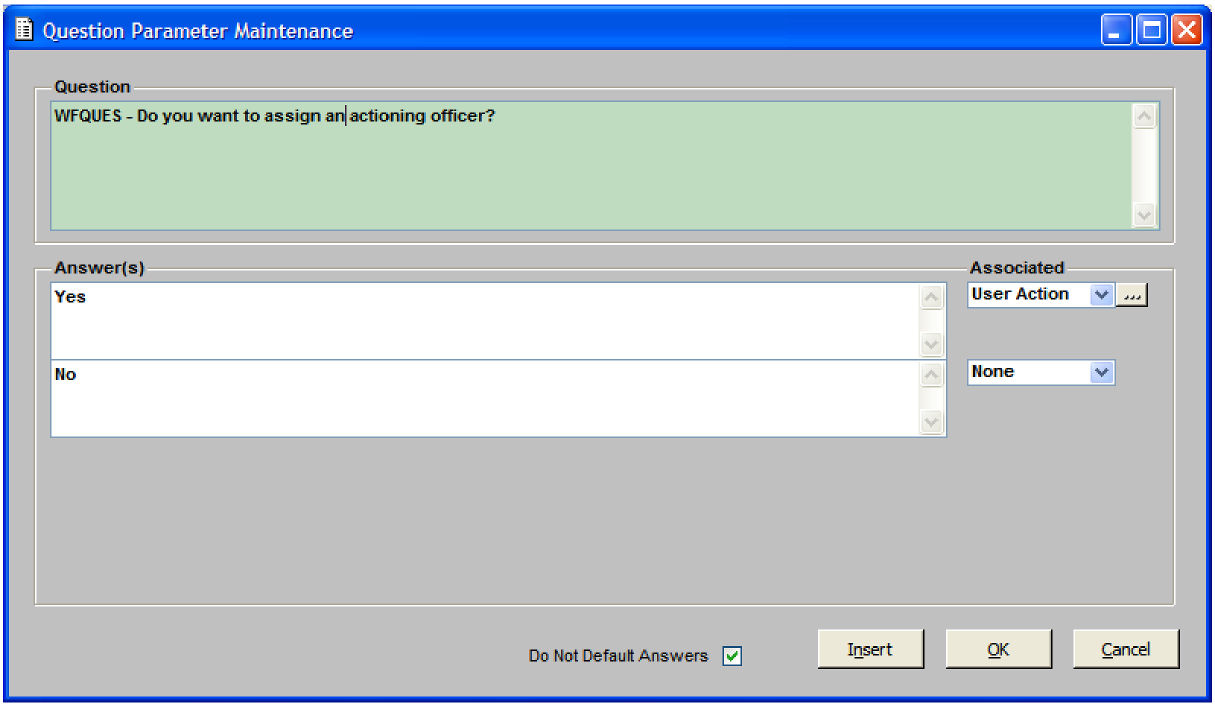
Assigned Task Types
These fields display the Task Types which have been assigned. Click the Select or Remove buttons to select and remove Task Types.

Search Profile – Task Type / Description
These search fields are available for searching the Available Task Types. This function is convenient when there are more than 9 occurrences. Wildcard searching is available in these fields, e.g. AS*.

Question Parameter Maintenance Form

The Question Parameter Maintenance form displays when the Action Parameters Option button is selected on the User Action Maintenance form when the WFQUESTION User Action is selected.

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



Question Parameter Maintenance Form

Question

The Question is entered into this field. This has a maximum of 250 characters.

Answer(s)

Each Answer allows a text response to be added up to 250 characters and allows Procedures, Task Types or Actions to be associated to the Answer.

Associated

There are four options available in the dropdown for the 'Associated' field. These are:-

- Procedure
- Task Type
- User Action
- None

When the user selects the required options then the Associated Maintenance form for the selection options will be displayed to enable the user to select the required items for the Answer. For example if Procedure is selected then the Associated Procedures Maintenance form will be displayed to allow the selection of the required Procedure(s).

If a User Action is associated to an Answer, then the original User Action will be completed and the attached User Action(s) will be added and executed immediately against the current Task.

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

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

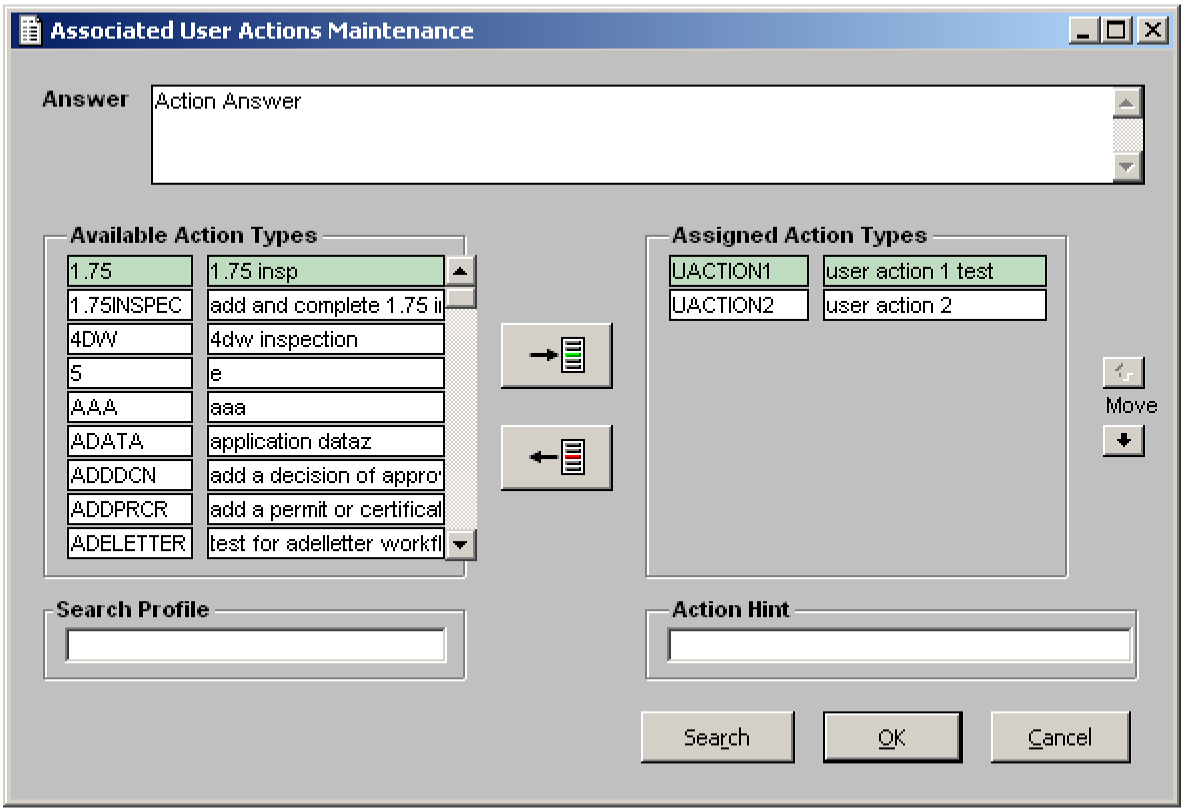
If 'None' is selected, then no User Action, Procedure or Task will be inserted upon answering the Question. When executing a User Action where such an Answer is selected, the User Action will be flagged as Completed and no User Action, Procedure or Task will be inserted, and the next User Action (if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

Do Not Default Answers

Check this flag off if you want the first answer to be checked ON by default.

Associated User Actions Maintenance Form

The Associated User Actions Maintenance form displays when the Associated field for an Answer has been set to 'User Action'. This form will automatically display when the Associated field is set to allow the user to select the required User Action(s) to be applied if this Answer is nominated as being required for the Question.



Associated User Actions Maintenance Form

Answer
The Answer that the User Action(s) are to be associated to is displayed in this field.

Available Action Types

The Available User Actions are shown in this list. The user can use the Add or Remove buttons to move the required User Action to the Assigned section.

Assigned Action Types

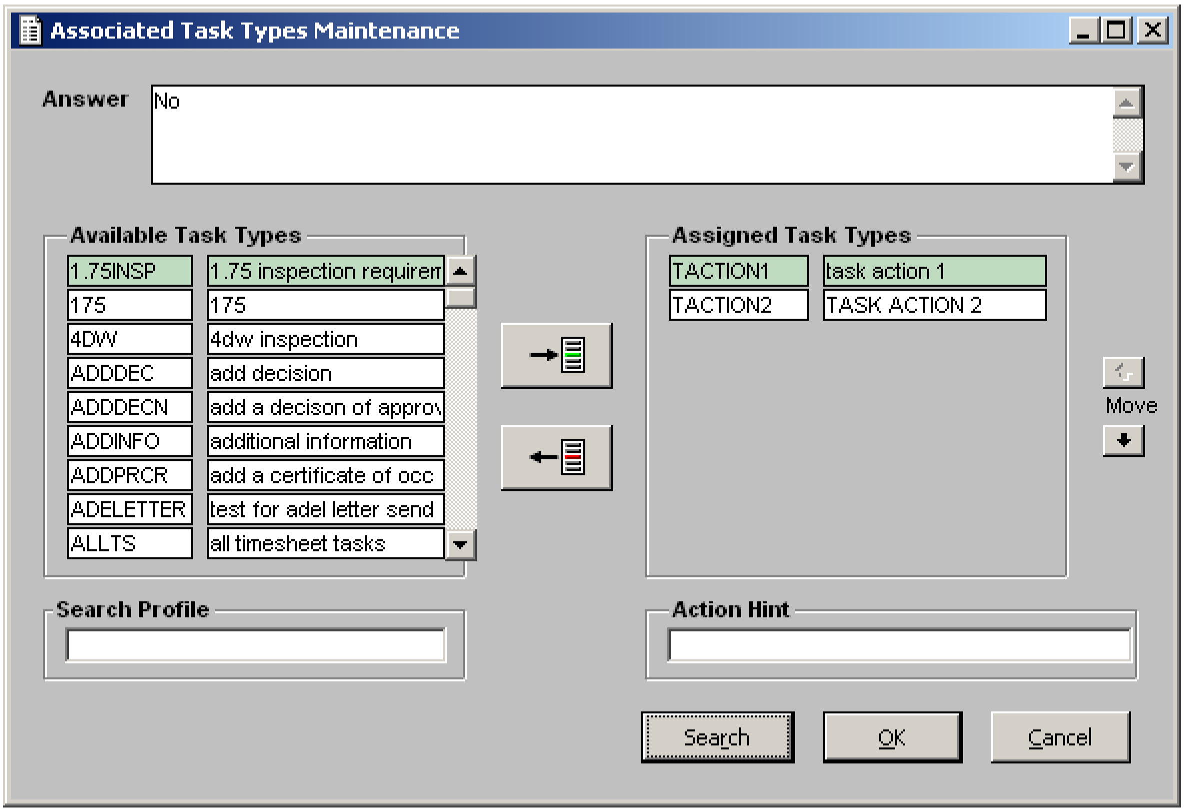
The Assigned Action Types shows those User Actions that have been assigned to the Answer. The user can use the Add or Remove buttons to select or remove User Actions.

Search Profile
The Search Profile can be used to search for certain User Action Code. Enter in the required Code and select the Search Option.

Action Hint
An Action Hint can be entered into this field. This is only applicable to User Actions that are assigned in this form.

Associated Task Types Maintenance Form

The Associated Task Types Maintenance form displays when the Associated field for an Answer has been set to 'Task Type'. This form will automatically display when the Associated field is set to allow the user to select the required Task Type(s) to be applied if this Answer is nominated as being required for the Question.



Associated Task Types Maintenance Form

Answer
The Answer that the Task Type(s) are to be associated to is displayed in this field.

Available Task Types

The Available Task Types are shown in this list. The user can use the Add or Remove buttons to move the required Task Type to the Assigned section.

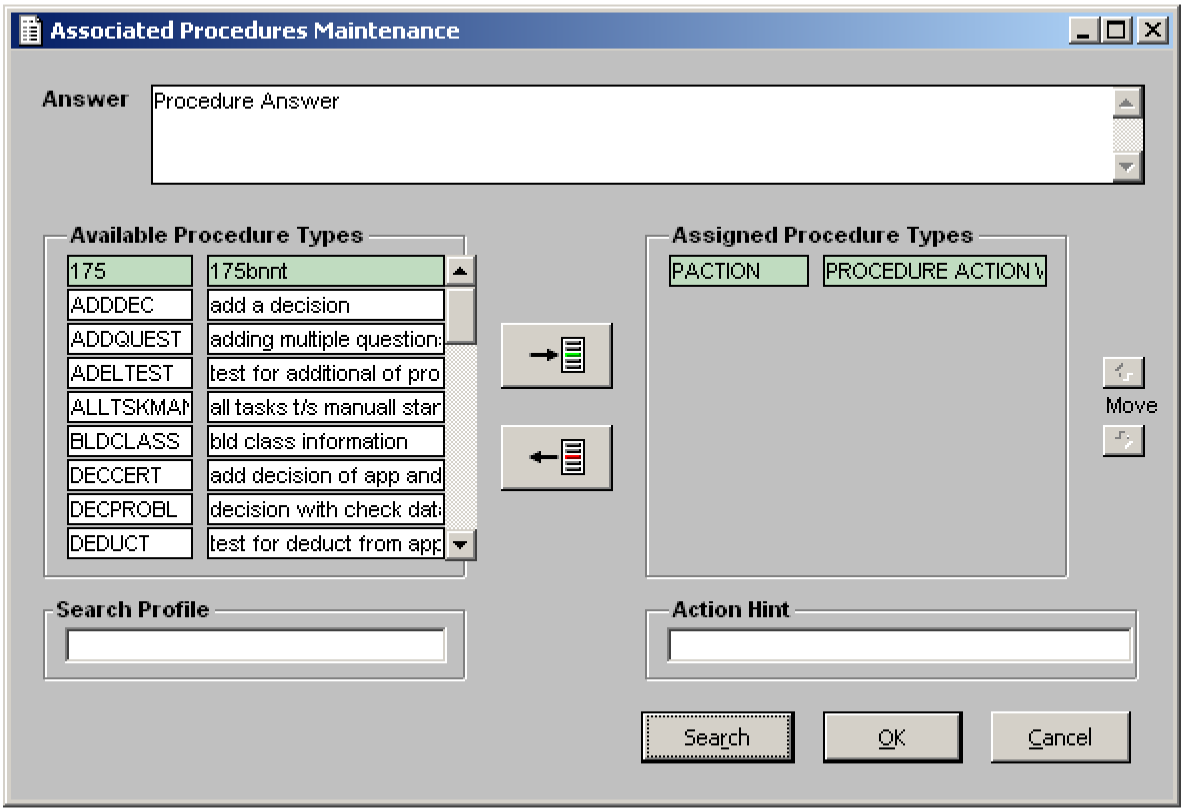
Assigned Task Types
The Assigned Task Types shows those Task Types that have been assigned to the Answer. The user can use the Add or Remove buttons to select or remove Task Types.

Search Profile
The Search Profile can be used to search for certain Task Type Code. Enter in the required Code and select the Search Option.

Action Hint
An Action Hint can be entered into this field. This is only applicable to User Actions and therefore is not applicable for Task Types assigned in this form.

Associated Procedures Maintenance Form

The Associated Procedures Maintenance form displays when the Associated field for an Answer has been set to 'Procedure. This form will automatically display when the Associated field is set to allow the user to select the required Procedure(s) to be applied if this Answer is nominated as being required for the Question.



Associated Procedures Maintenance Form

Answer
The Answer that the Procedure(s) are to be associated to is displayed in this field.

Available Procedure Types

The Available Procedure Types are shown in this list. The user can use the Add or Remove buttons to move the required Procedure Type to the Assigned section.

Assigned Procedure Types

The Assigned Procedure Types shows those Procedures that have been assigned to the Answer. The user can use the Add or Remove buttons to select or remove Procedure Types.

Search Profile
The Search Profile can be used to search for certain Procedure Type Code. Enter in the required Code and select the Search Option.

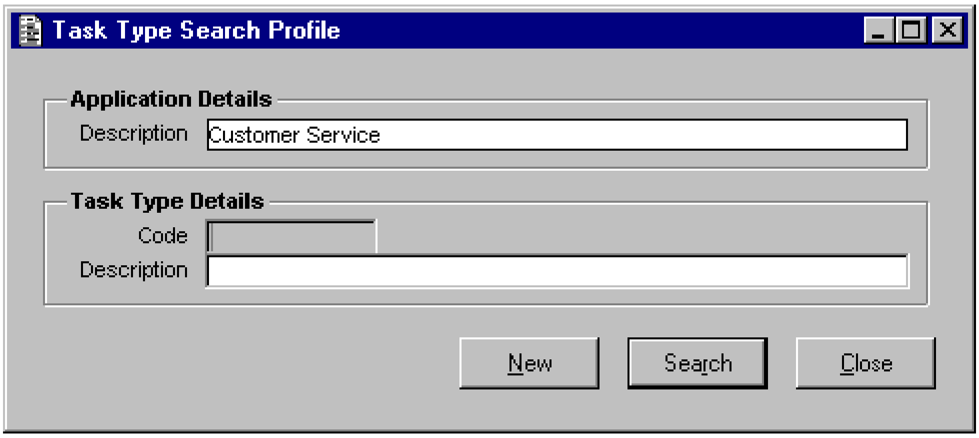
Action Hint
An Action Hint can be entered into this field. This is only applicable to User Actions and therefore is not applicable for Procedure Types assigned in this form.

Task Type Search Profile Form

This form is presented when the Task Type Maintenance button is pressed on the Work Flow parameter form.

It allows for the entry of a search criteria for all Task types established in the system. If no criteria are given and Search is pressed then all Task types will be displayed.

New Task types may also be created from this form by pressing the New Button. (F9)



Task Type Search Profile Form

Application Details – Description
This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

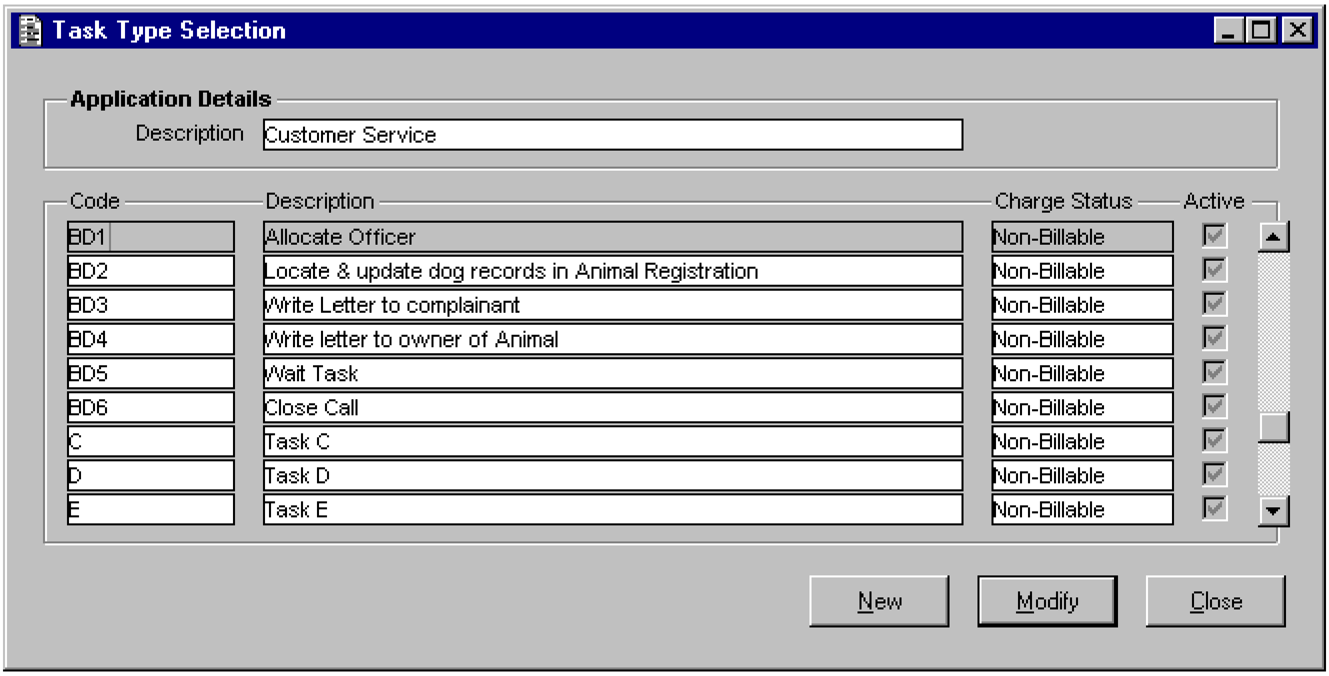
Code
Enter a code (or part thereof) on which to base your search. Full wild card searching is available on this field.

Description
Enter a description (or part thereof) on which to base your search. Full wild card searching is available on this field.

Task Type Selection Form

This form is presented when more than one task type matches the search criteria entered.

From this form you may select a task type to modify by pressing the Modify Button or create a new task type by pressing the New Button.



Task Type Selection Form

Application Details – Description

This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

Code

This field contains the user defined code that has been assigned to the task type.

This field is display only and may not be maintained.

Description

This field contains the full description of the task type.

This field is display only and may not be maintained.

Charge Status

This field displays the charge status assigned to the task type.

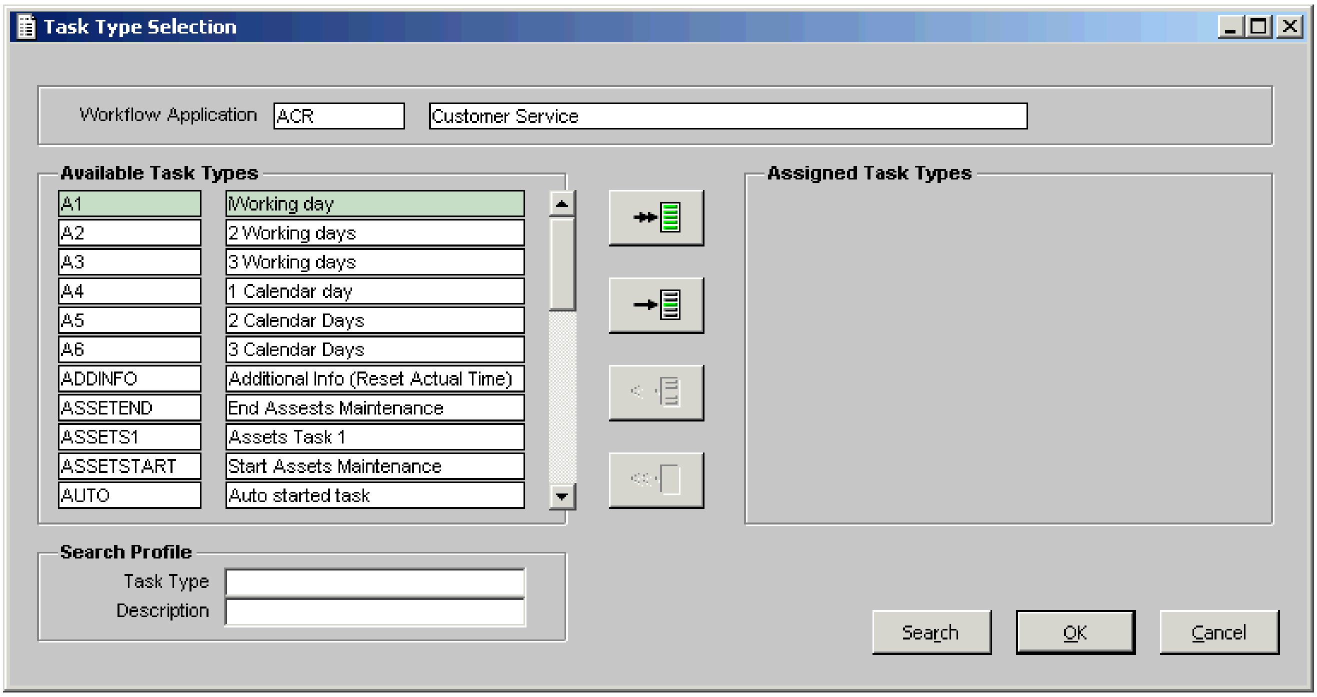
This field is display only and may not be maintained.

Active

If this flag is checked on then the Task Type is available for use within the system.

Task Type Selection form (used from other applications)

This form is used to select Task Types from other applications (e.g. The Responsible Officer Reassignment process in Customer Service). The Select and Remove buttons are used to move Task Types from the ‘Available’ side to the ‘Assigned’ side of the form.



Task Type Selection form

Workflow Application

These fields display the Workflow Application Code and Description.

Available Task Types

The fields on the left side of the form contain the Task Types which are available for selection.

Assigned Task Types

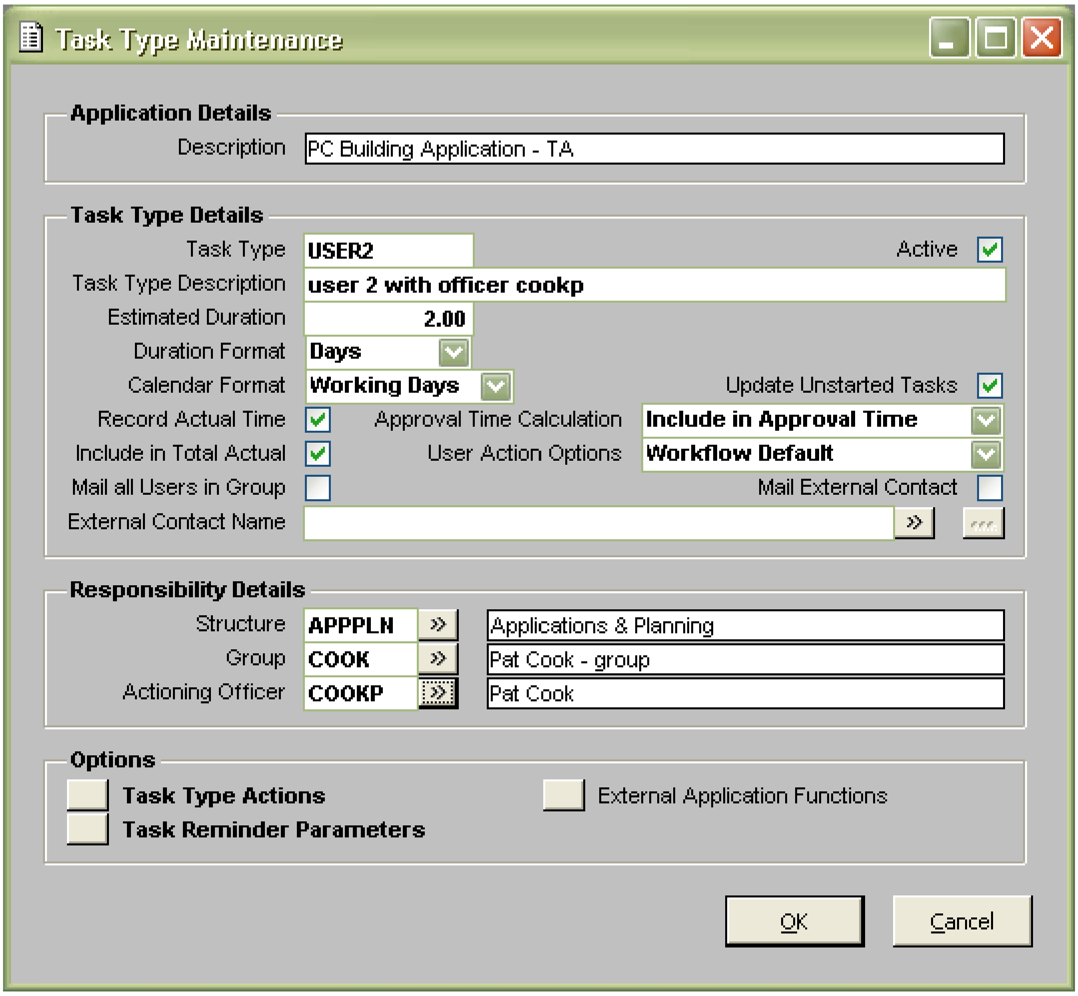
The fields on the right hand side of the form contain the Task Types which have been assigned.

Search Profile – Task Type/Description
These fields allow the user to enter a Task Type Code and/or Description as a search profile to find a particular Task Type or group of Task Types. This can be useful when there are more than 9Task Types to search through.

Task Type Maintenance Form

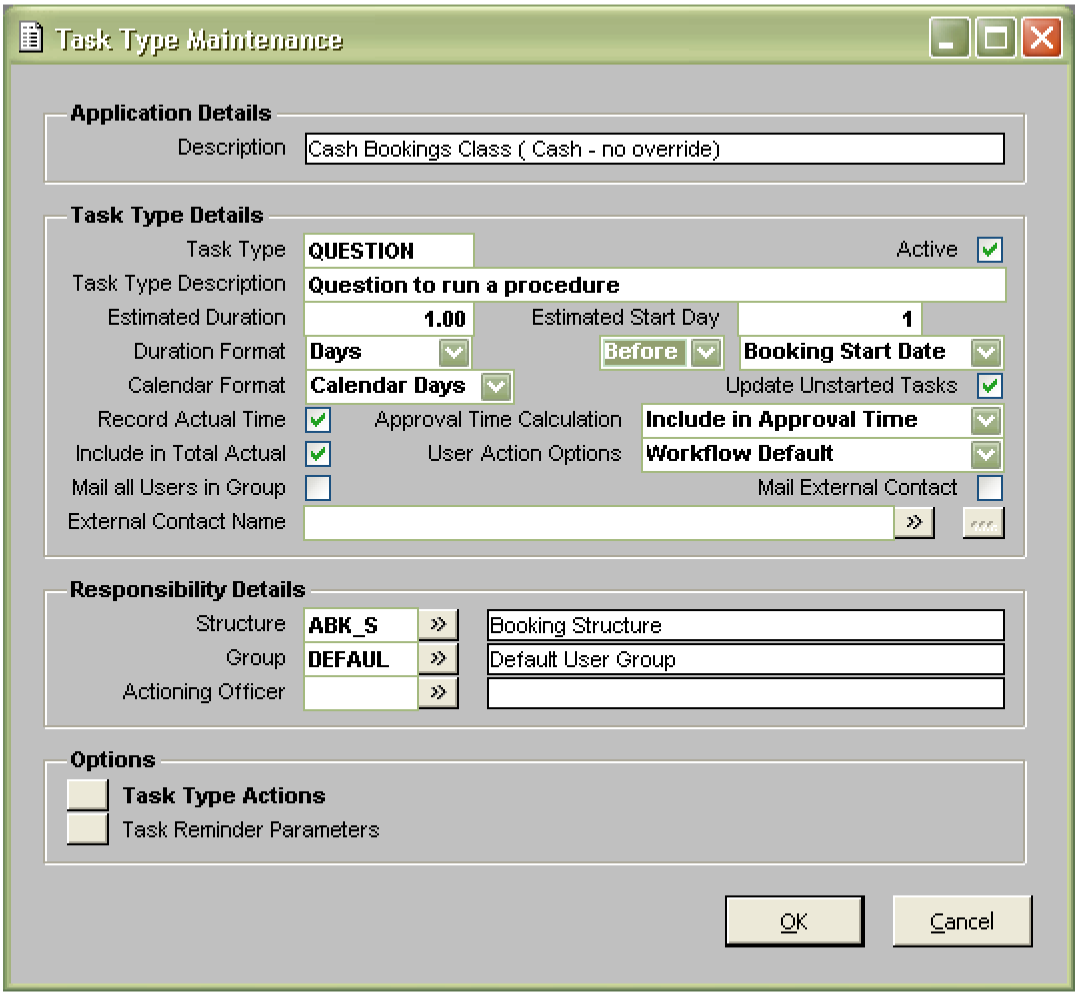
This form allows for the creation, maintenance and deletion of all tasks to be used by the Work Flow module.

User Actions may be assigned to the Task Type. Task Reminder Parameters (which is an authorised function) may also be set up to send reminder emails to selected Pathway users with details about Tasks which are nearly due or overdue.



Task Type Maintenance Form

New fields have been introduced in this form to cater for requirements within the Event and Facility Bookings Module to allow the user to nominate that a Task needs to occur “X” days before or after the Booking Date. An example of a situation where this would be used is for tasks that indicate that a Bond is required to be refunded, in which case, the task must occur “X” days after the booking and should not occur before. Similarly, there could be certain tasks that need to occur before the actual Booking Date and they need to take place “X” days before the Booking Date. See Estimated Start Day for further details.



Task Type Maintenance form showing Estimated Start fields (used for Bookings Module)

Application Details – Description
This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

Code
This field contains a ten character unique code for the task type. This field is mandatory.

Description
This field contains a fifty character description for the task type.

This description is displayed on the users in-tray and when viewing tasks for a particular record. It is important that this description is meaningful. This field is mandatory.

Estimated Duration
This field contains the length of time that the task is expected to take. It works in conjunction with the Duration Format field and the Calendar Format field.

The Estimated dates on the task record are calculated based on this value.

Example
Task is Started - Monday 2nd August 1999 @ 9:20 am
Calendar format is Working Days
Saturday and Sunday are non-working days.

1 minute	Est. End = Monday 2nd August 1999 @ 9:21 am
1 hour	Est. End = Monday 2nd August 1999 @ 10:20 am
1 day	Est. End = Tuesday 3rd August 1999 @ 9:20 am
1 week	Est. End = Monday 9th August 1999 @ 9:20 am

1 month	Est. End = Thursday 2nd Sept 1999 @ 9:20 am (If this date was a non working day the result be Friday 3rd Sept)
1 year	Est. End = Wednesday 2nd August 2000 @ 9:20 am
7 days	Est. End = Tuesday 10th August 1999 @ 9:20 am

It should also be noted that the Start Time and Finish Time assigned to the Calendar that Work Flow is using also has bearing on the calculation of estimate dates/times

Example
If Calendar Start Time = 9:00 and End Time = 18:00 and
Est duration of task = 2 hours
Task is started at 17:30:00.
The Estimated end will be tomorrow @ 10:30

Estimated Start Day

The functionality provided by these fields is currently specific to the Event and Facility Bookings Module, but may be extended to other modules at a future time. These fields allow the user to specify whether a Task needs to occur a specified number of days before or after the Booking Date. This could be used where a Bond is required to be refunded a specific number of days after the booking has taken place. Other Tasks may need to occur before the actual Booking Date and must occur “X” days before the Booking Date.

The Estimated Start Day field allows a number to be entered, e.g. 5. This refers to the *number* of days before or after the Booking Date.

The additional fields require a selection from dropdowns:

- Before
- After

- Booking Start Date
- Booking End Date

The Booking Date is determined in the following way. Where multiple Booking Lines exist against the Booking request, then the first Booking Line date is used to calculate the Estimate Dates for Tasks that need to occur X days before the start of a Request. The last Booking Line date is used to calculate the Estimate Dates for Tasks that need to occur X days after the Booking has occurred. If a single Booking Line exists against a Request, then the date against the Booking Line is used as the Booking Date for those Tasks that need to occur before and after the Booking Date.

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

Duration Format
This field contains the format in which the Estimated duration has been given.

Valid values are:-

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

This field is used in conjunction with the Estimated Duration and Calendar format fields to provide estimated dates for the task.

For more information refer to help on the Estimated Duration field.

Calendar Format

This field determines whether or not non-working days (i.e. weekends, public holidays) are to be taken into consideration when determining estimated task dates.

If Working Days is selected then the calculation of estimated dates within work flow will not include any date within the Calendar System that has been flagged as non-working.

If Calendar Days is selected then the calculation of estimated dates within work flow will include all calendar days, even those flagged as non-working days.

For more information refer to help on the Estimated Duration field.

Update Unstarted Tasks

When this flag is checked ON any changes made to the Task Type itself can change unstarted Tasks when the update process is run. Where the Flag is OFF the updates will not occur. Tasks that have been started will not be affected by this process.

The following fields will be updated for any unstarted Tasks when a Task Type has been modified and flagged to updated via the Batch Process.

- Responsibility Structure
- Responsibility Group
- Responsibility User
- Estimated Duration
- Original Estimate
- Duration Format
- Calendar Format
- Mail all users in a Group
- Mail external contact
- Record Actual Time
- Include in Total Actual
- Approval Time Calculation

The Batch process used to update Unstarted Tasks is found in the Workflow Module menus.

Active Flag

If this check box is turned on then the Task type is available for use by the work flow system.

If this check box is turned off then the Task type is no longer available for use. Any records currently using this Task type will remain unaffected, however the Task type will no longer be available for selection.

Billable Task

This feature is not yet implemented, future development.

Record Actual Time

If this flag is checked on, then the user will be forced to enter the actual time spent on the task.

If this flag is not checked on, then the user will not be prompted for entry of actual time, i.e. if the 'Record Actual Time' flag is off, then the system will calculate the Actual Duration based on the Actual Start and Completion Dates.

Include in Total Actual

If this flag is checked on then the Actual Time Spent on the task will be included on the Actual Times Report.

If this flag is not checked on then any Actual Time Spent that is entered will not be included on the Actual Times Report.

This flag cannot be set on if the Record Actual Time flag is off.

Approval Time Calculation
The Approval Time Calculation field is used to nominate how the Task is to be used to calculate the Approval Time.

Users can choose from 3 options:-
- Include in Approval Time
- Exclude from Approval Time
- Deduct from Approval Time

User Action Options
The User Action Options parameter is used to control the processing of Tasks once all the 'Actions' have been completed for the Task.

This is set at the Workflow Parameter level but can be overridden at a Task Type level. The default value of the Task Type level is 'Workflow Default' but this can be changed.

The available options for the 'User Action Option' are:-
- Workflow Default (default setting)
- No Action Required
- Complete a Task
- Confirm Completion

The processes that are performed depending on the setting are:-

Workflow Default
This indicates that the 'User Action Options' at the Workflow Parameter level is always applied to this Task Type.

No Action Required
When this Task Type is started and all User Actions are processed then no End Task is performed

Complete a Task
When this Task Type is started and all User Actions are processed then the End Task is performed.

Confirm Completion
When this Task Type is started and all User Actions are processed then a confirm completion message is displayed asking whether the User wants to complete the Task or not.

NOTE: When the Task Type has no User Action attached then no End Task is performed regardless of the value of the 'User Action Options'.

Mail all Users in Group
If this flag is turned on then whenever the task is started (by a previous task) all users within the responsibility group assigned to this task will receive an e-mail message advising a task has been started and for which record it belongs.

Mail External Contact
If this flag is turned on the user (when starting the task) will be prompted for an external contact name. This function is not currently available.

External Contact Name
This field establishes a link between the task type and a name held within the Name and Address system.

You may enter a name directly into this field (e.g. brown, john) and if a match (or matches) is found it will be displayed on the Name Selection Form.

If the name is not entered into this field the pop up button may be pressed which will display the Name and Address Search Profile from which you may either enter a search criteria or create a new name (subject to security).

If you wish to remove a name from this field, highlight the name displayed and press the delete key.

The use of this name function is not currently available

External Contact Name Detail Button

This button is only available if a name has been selected. Pressing this button will present the Name Maintenance/Enquiry form for the linked name record.

Structure

This field contains the name of the responsibility structure that is assigned to the task.
Only Groups and Users within this Structure will be able to access the Task.
The structure that is nominated on the Work Flow Parameter Maintenance form as the default structure will automatically be inserted into this field. If a different structure is required then overtype the structure code with another structure code or alternatively press the pop up button associated with the field. Any structure defined within Pathway may be assigned. This field is mandatory.

The Responsible Officer and Group on a Task are determined in the following way.
Where the user starting or ending the Task is not in the assigned Responsibility Group, then that Responsibility Group will be used as the starting point to determine if the user can perform the Task. From this Group the Parent Group will be checked to see if the user is a member of the Parent Group. If the user is not a member of the Parent Group, then the Parent of that Group will be checked, and so on. If the top of the Structure is reached then the process will begin checking other Branches of the structure, looking for the user as a member of a Group closest in level to the originally assigned Responsibility Group.

Note: When Responsibility Maintenance is performed and Structures are modified, the system will perform the rebuild function interactively, sending e-mail messages to those affected users who are logged on at that time. It is VERY IMPORTANT that any user that receives an e-mail informing them that their Responsibility Options have changed should Log Off any of their active sessions as soon as possible, and then Log On again. If this is not done then the Responsibility details in effect for the user will be incorrect and could cause errors when Starting or Ending Tasks, or performing any other system action that is dependant on Responsibilities.

Group

This field contains the Group that will be assigned to the Task. This field is mandatory.
Only Groups within the nominated structure will be available for selection.
Refer to additional notes under 63 (Structure field).

Actioning Officer

This field contains the name of an individual officer that is responsible for the Task.
Only this officer (or another officer higher in the responsibility structure) will be able to maintain the Task. The officer must reside within the Group.
This field is not mandatory. If an officer is not nominated then all officers within the Group will be able to maintain the Task.
Refer to additional notes under 63 (Structure field).

Options - Task Type Actions

Pressing this button will present the Task Type Action Maintenance Form.

Options – Task Reminder Parameters

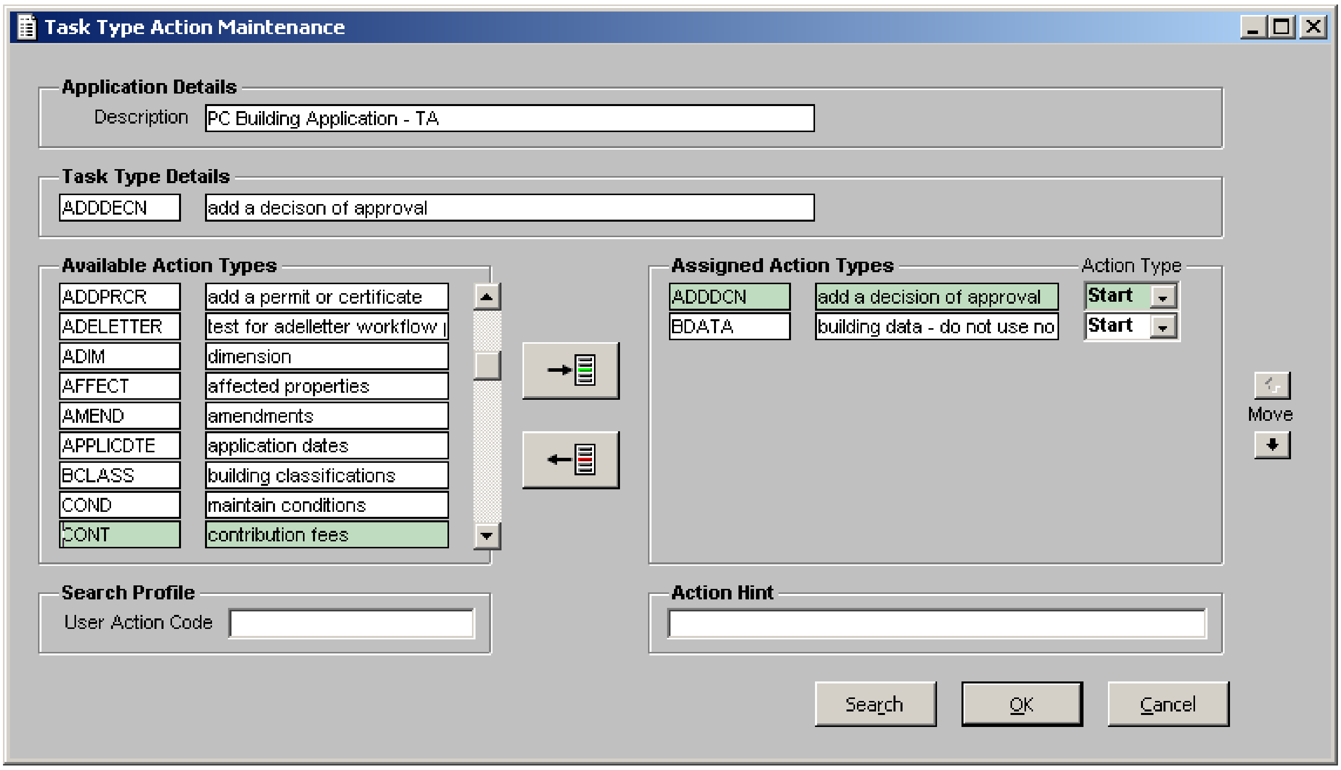
The Task Reminder Parameters Option Button is only visible if a valid access code has been supplied for the Task Reminders authorised function, and its label will be bolded whenever Task Reminder Parameters have been defined. Selecting this button activates the Task Reminder Parameter Maintenance form where parameters may be defined for the sending of reminder emails to Pathway users with details about Tasks which are nearly due or are already overdue.

Options – External Application Functions

This button is used where an external application (such as Applications) has a function that will change the behaviour of the Task. For example, in the Applications Module, Processing Groups will override the security associated to the Task.

Task Type Action Maintenance Form

This form allows (optionally) for User Actions to be assigned to an individual Task Type.
Actions selected are nominated as either Start or End Actions.
When a task is started all User Actions defined as “Start Actions” will be executed.
When a task is completed all User Actions defined as “End Actions” will be executed.
An “Action Hint” may be assigned which will be displayed to the current user in the Status line. This Hint is designed to “tell” the user what is expected.



Task Type Action Maintenance Form

Application Details – Description

This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

Task Type Details

This field displays the code and description of the Task Type to which you are assigning User Actions.

Available User Actions

This list displays the code and description of all available User Actions.

The User Action required is moved to the right hand column using the Select Button.

These fields are display only and may not be maintained.

When a User Action is assigned note that it still remains in the available list. This enables the same User Action to be assigned more than once.

Search Profile – User Action Code

Due to the (potentially) large number of User Actions that may be defined a Search Profile has been provided to allow the available list to be restricted.

Enter a valid code (or part thereof) and press the Search Button. The Available User Actions list will show all actions that match the search profile. E.g. Enter *MAIL* and all User Action Codes containing the text MAIL will be displayed.

Add /Remove Buttons

Use the Add and Remove Buttons to remove or add Tasks to the User Action.

Assigned User Actions

This list displays all User Actions that have been assigned to the Task Type.

To remove a User Action from the assigned list use the Remove Button.

These fields are display only and may not be maintained.

Action Type

This field determines whether the assigned user action is to be executed at the Start or the Completion of a Task.

Start

The assigned user action will only be executed whenever the Task is Started.

End

The assigned user action will only be executed whenever the Task is Completed.

Action Hint

For each Action assigned to the Task a "Hint" may be entered in this field. Up to 100 characters may be entered.

When the Action is performed the message contained within this field will be displayed in the status bar.

Task Reminder Parameter Maintenance Form

Reminder emails are able to be sent to chosen Pathway users with details about Tasks nearly due or overdue.

A reminder email for a Workflow Task can be sent if a pre-defined checkpoint is reached without the Task having been completed. The checkpoints are defined against Task Types via Task Type Maintenance, and for each checkpoint in turn it is possible to nominate Pathway users to receive appropriate emailed reminders. The process of sending reminders is driven by batch jobs running on a Background Job Queue. Task Maintenance and Task Report functions will show the last reminder date/time and the total number of reminders for a Task.

Task Reminder Processing

The process of sending reminder emails is handled by batch jobs running on a Background Job Queue. Each time a Task is created, by whatever means, a check is made for reminder parameters against the relevant Task Type. If reminder parameters are present, a delayed job is submitted to the Background Job Queue used by Workflow. It is set to run at the time the first reminder is due for the Task.

When the reminder processing job for a Task runs, it sends emails to the appropriate recipients, and then updates the Task with the last reminder date/time and total number of reminders sent. Of course, no reminders are issued if the Task has been completed. If a subsequent checkpoint has been defined against the Task Type, another job is submitted to the Workflow Background Job Queue to run at the appropriate time.

The Calendar Format against a Task is used in determining the next reminder date. For example, take a Task with a Calendar Format of *Working Days*, where the calendar specifies a working day of 8:30 AM to 5:00 PM. If the Task is scheduled to be completed at 10:30 AM on a Friday, with the next reminder due to be sent four hours before completion, the reminder is sent at 3:00 PM the previous day.

To cover all eventualities, whenever the reminder parameters against a Task Type are modified, a different background job runs to submit new reminder processing jobs for unfinished Tasks of the relevant type. Additionally, if a Task's Estimated Completion Date changes (for example, upon completion of a previous Task), a new reminder job is submitted. Reminder processing jobs are able to detect whether they've been "superseded" by another job, in which case they exit immediately, without sending any emails or submitting further jobs. This prevents a build-up of reminder jobs servicing the same Task.

Subject lines of emails sent to remind Pathway users about an individual Task vary depending on the recipient. The Task's Responsible Officer will receive a message with a subject line similar to the following:

```
Task Reminder: 4 Hours Before Due - Parks Inspection Task
```

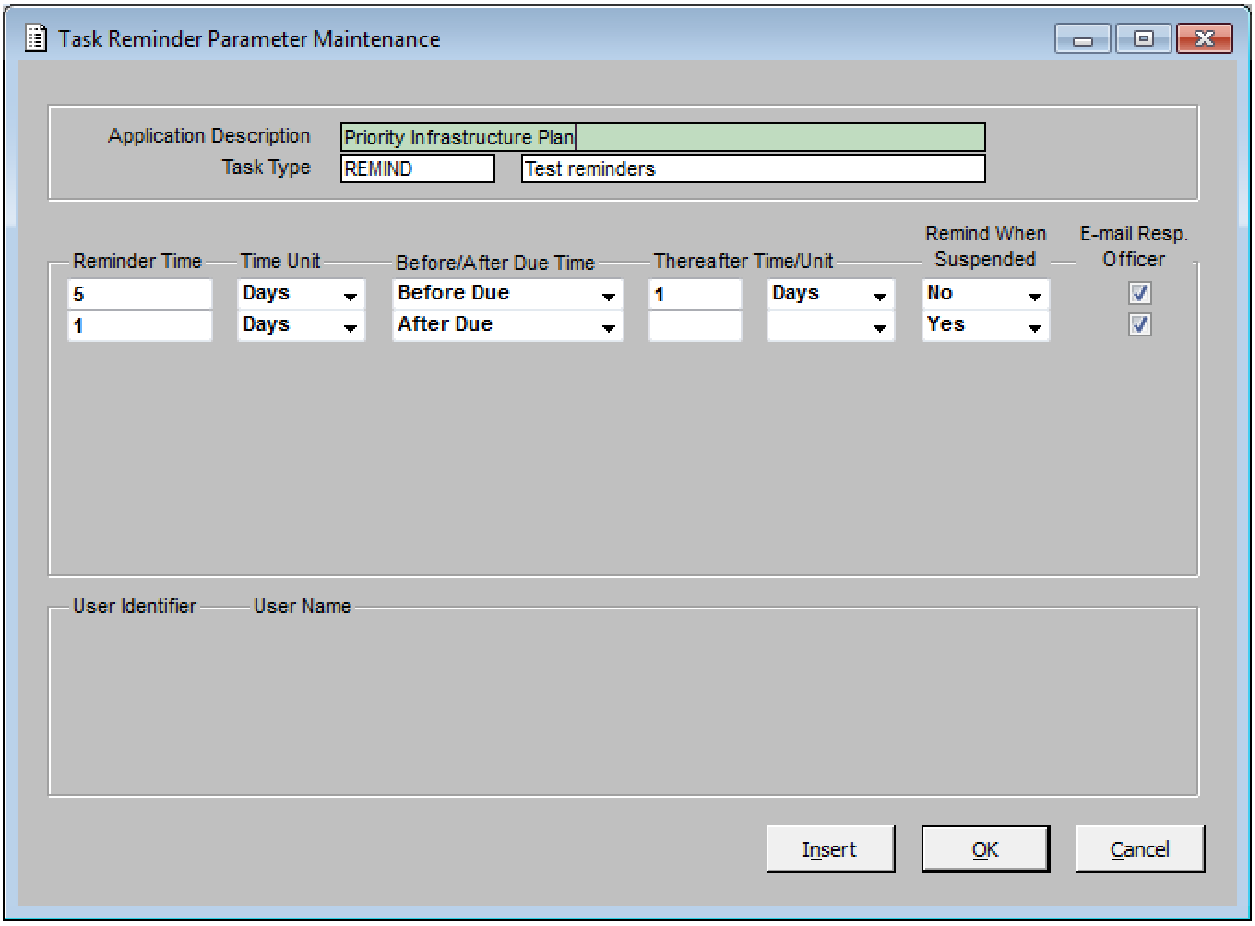
Other users reminded about the Task will receive a message with a subject line similar to the following:

```
Task Reminder for Fred Jones: 4 Hours Before Due - Parks Inspection Task
```

The message body is laid out as in the following example:

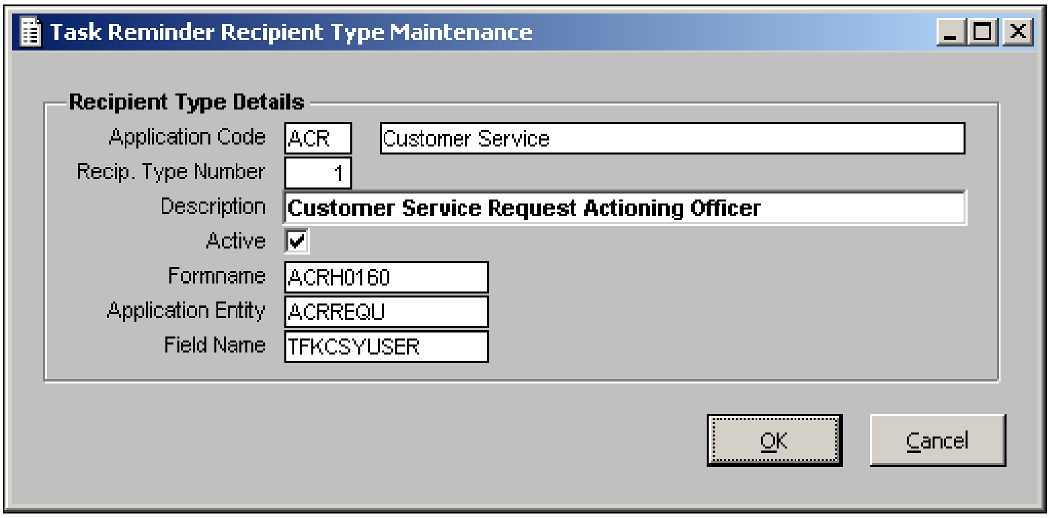
```
Task Reminder
-------------
Application:                Customer Service
Details:                    Request: 9021, Mow Park
Task:                       PKINSP – Parks Inspection Task
Responsible Officer:        Fred Jones
Estimated Completion Date:  19-Dec-2003 14:27:20
Last Reminder:              17-Dec-2003 14:40:33
Times Previously Reminded:  1

Checkpoint:                 4 Hours Before Due
```

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



Task Reminder Parameter Maintenance Form

Task Reminder Recipient Type Maintenance
A new menu option, *Task Reminder Recipient Type Search Profile*, has been added to the [System Administration][Workflow Parameters] menu. It allows Recipient Types to be retrieved for maintenance by searching on any combination of *Application Code*, *Recipient Type Number* and *Description*. While Recipient Types are Infor-defined, sites are free to maintain the *Description* field and *Active* flag.



Task Reminder Recipient Type Maintenance form

Application Description
This field displays the relevant Pathway application, e.g. Customer Service.

Task Type

These fields display the appropriate Task Type Code and Description to which these Task Reminder Parameters apply.

Reminder Time
These fields are used to define checkpoints relative to the Task's Estimated Completion Date. They are displayed in chronological order irrespective of the order in which they are entered. To define a checkpoint, select the Insert button and select 'Checkpoint' from the dialogue box. Enter details in the Reminder Time field, then select a Time Unit and Before/After Due Time occurrence. The available time units are Minutes, Hours, Days, Weeks and Months.

Time Unit
This field allows a Time Unit to be selected from the dropdown to work in conjunction with the Reminder Time field.. The available options are:

- Minutes
- Hours
- Days
- Weeks
- Months

Before/After Due Time
This field allows selection of a 'Before or After Due Time' indicator. The available choices are:

- After Due
- Before Due
- Thereafter
- After Commenced

The 'After Due' option would be selected to remind an officer that a Task's due date has passed, e.g. 1 day After Due.

The 'Before Due' option would be used to remind an officer that a Task is nearly due, e.g. 2 days Before Due.

It is also possible to define a 'recurring' checkpoint by selecting the 'Thereafter' option. Only one of these recurring checkpoints is allowed per Task Type. It enables reminders to be sent at the specified time interval (e.g. one day, four hours etc) until a Task is completed, once reminders have been sent for all other checkpoints.

A recurring checkpoint might be the only one defined against a Task. In that case, the time interval relates to the due date of a Task, rather than the previous checkpoint.

Suspended Tasks

In addition to this a further option is available: "After Commenced". This allows reminders to be sent at the relevant checkpoints after the Suspension of the Task has commenced.

This allows for the situation where a site may not wish to enter a Suspension end date but needs to be reminded 10 days after a Suspension is applied and a further reminder to a Team Leader is required every 5 days after that.

The "Thereafter" option can work on either the "After Commenced" reminder or the "Before or After Due" reminder. This allows for the situation where a site may set up the following reminders:

10 days after commenced
5 days thereafter
2 days before due

The "Thereafter" reminder is begun 5 days after the "After Commenced" reminder is sent, not 5 days after the "Before Due" reminder is sent.

Thereafter/Time Unit

The Task Reminder Parameters Maintenance now includes 2 new fields of Thereafter Times and Thereafter Unit, attached to each checkpoint.

The process of sending Reminders is now as follows:

At each Checkpoint, a Reminder is sent. If the Checkpoint has Thereafter Time and Unit specified, then at the time specified in the Thereafter, additional Reminders are also sent, until the time of the next Checkpoint is reached, e.g.

A Task can be set up with:

28 Days before Due Date with 1 Week Thereafter;
1 Day After Due Date
2 Days Thereafter.

Then Reminders will be sent at:

28 Days (4 weeks) before Due Date;
3 weeks before Due Date;
2 weeks before Due Date;
1 week before Due Date;
on Due Date (0 week to Due Date)
1 Day After Due Date
2 Days Thereafter... (Until Task is completed)

Note: Unless Users want to modify existing Reminders for additional features, they are not required to revise them and they will be processed as normal.

Remind when suspended
Z_CWFG9042_CWFTRCP_RMDWHNSUSP_DISPLAY
This setting allows for the sending of reminders for suspended tasks to be controlled on a per-checkpoint basis.
The values available in the drop-down list are:

(default)	When selected, the contents of the field are replaced by the default value (*Yes* or *No* – see following), and the background is greyed out.
Yes	Reminders are sent for the checkpoint when tasks of the relevant type are suspended.
No	Reminders are *not* sent for the checkpoint when tasks of the relevant type are suspended.
Only	Reminders are sent for the checkpoint *only* when tasks of the relevant type are suspended.

The default value for new checkpoint records, or when *(default)* is selected in the drop-down list, is determined as follows:

- If there is a CWF_AllowSuspendedTaskReminders=0 entry in the SetL.asn file, the default value is *No*.
- Otherwise, the default value is *Yes*.

Default values are displayed on a grey background.
Changing the value of the CWF_AllowSuspendedTaskReminders SetL.asn entry automatically changes the suspended task handling of checkpoints with the default *Remind When Suspended* value.

E-mail Responsible Officer
For each checkpoint defined, it is necessary to specify at least one Pathway user to be sent a reminder email. The Task's Responsible Officer will be notified if the *Email Resp. Officer* checkbox is ticked against a checkpoint. (If this checkbox is checked OFF, a message will display to point out that there are no Email Recipients for this Checkpoint. A further message will suggest that either the Email Resp. Officer checkbox must be ticked, or at least one specific User or Recipient Type must be nominated to receive a reminder email.)

The form's *Insert* button facilitates nomination of other Pathway users to receive reminder messages for each checkpoint. (When *Insert* is selected, a message asks whether a Checkpoint or Message Recipient is to be added.) It is possible to select either specific users or application-related *Recipient Types*, as follows:

Application	Recipient Type	Description

Application	Recipient Type	Description
ACR	1	Customer Service Request Actioning Officer
ACR	2	Customer Service Request Responsible Officer
LAP	1	Application Primary Responsible Officer
LAP	2	Application Secondary Responsible Officers
LLC	1	Licence Primary Responsible Officer
LLC	2	Licence Secondary Responsible Officers

Recipient Types are Infor-defined, although some maintenance is allowed. The available Recipient Types obviously depend on the application for which Task Types are being maintained. If Customer Service is the relevant application, only the *Customer Service Request Actioning Officer* and *Customer Service Request Responsible Officer* Recipient Types are available. It is intuitive as to which users receive reminder emails. For example, for Tasks attached to a Customer Service Request, the user currently nominated as the Request's Actioning Officer will receive an email when a reminder is due to be sent to the *Customer Service Request Actioning Officer* Recipient Type.

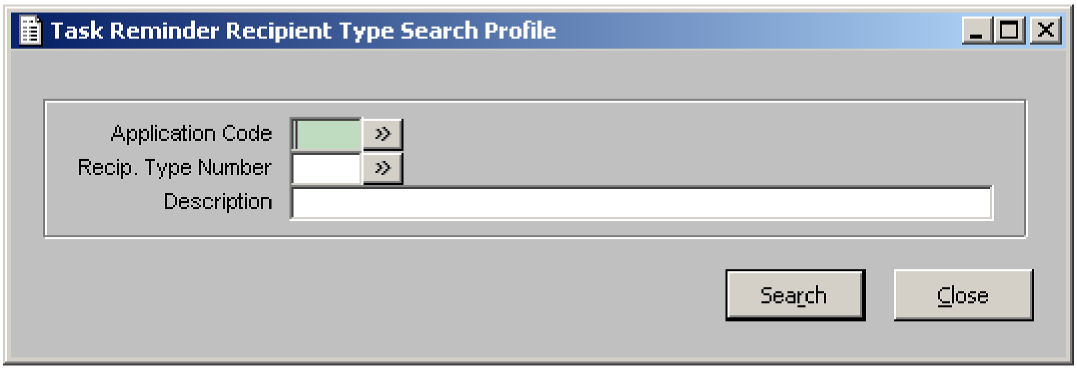
The additional users to receive reminder messages for the currently selected checkpoint are displayed in the area beneath the list of checkpoints.

User Identifier / User Name

These fields display any additional users who are to receive reminder emails for the currently selected checkpoint.

Task Reminder Recipient Type Search Profile Form

The *Task Reminder Recipient Type Search Profile*, accessed via the [System Administration][Workflow Parameters] menu allows Recipient Types to be retrieved for maintenance by searching on any combination of *Application Code*, *Recipient Type Number* and *Description*. While Recipient Types are Infor-defined, sites are free to maintain the *Description* field and *Active* flag.



Task Reminder Recipient Type Search Profile Form

Application Code

An Application Code may be selected via the Pop Up button to be used in your search. All available Application codes will display for selection, however, not all will have Recipient Types defined against them. Leaving this field blank will include all Application Codes

Recipient Type Number

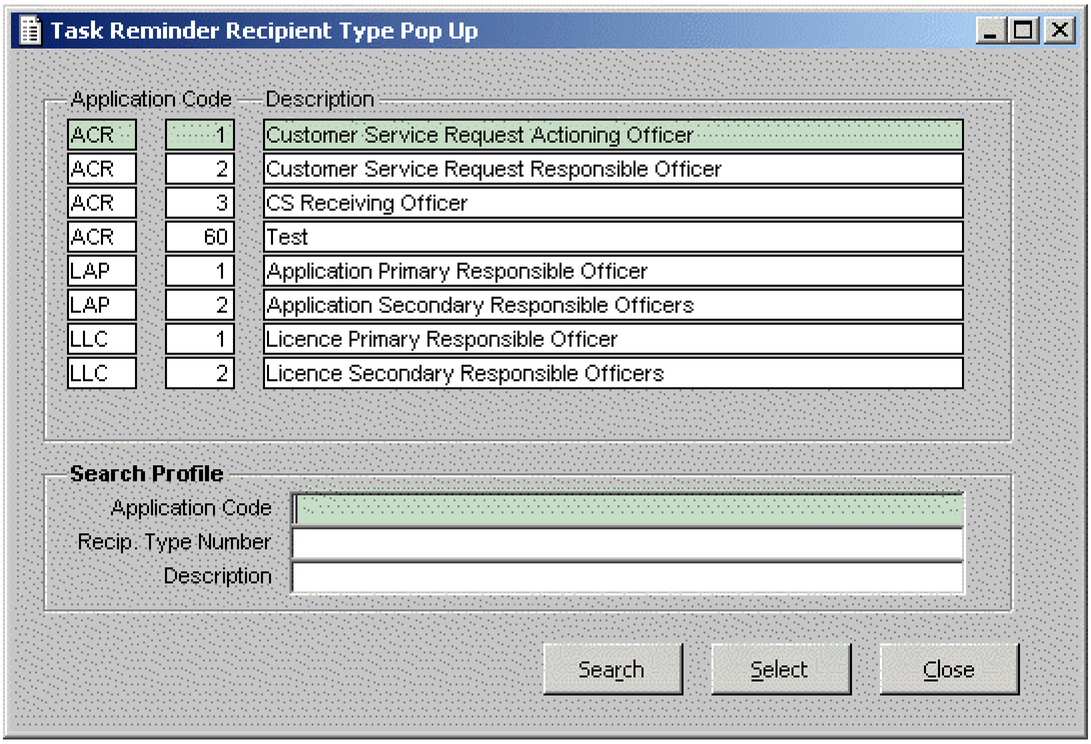
A Recipient Type Number may be keyed into this field as part of your search profile, or, alternatively, selected via the Pop Up button. These numbers are system-defined. Leaving this field blank will include all Recipient Type Numbers.

Description

A Recipient Type description may be keyed in as part of your search profile. Leaving this field blank will include all Descriptions.

Task Reminder Recipient Type Pop Up Form

This form displays when the Pop Up button on the Recipient Type Number field is selected. It displays all available Task Reminder Recipient Types for selection.



Task Reminder Recipient Type Pop Up Form

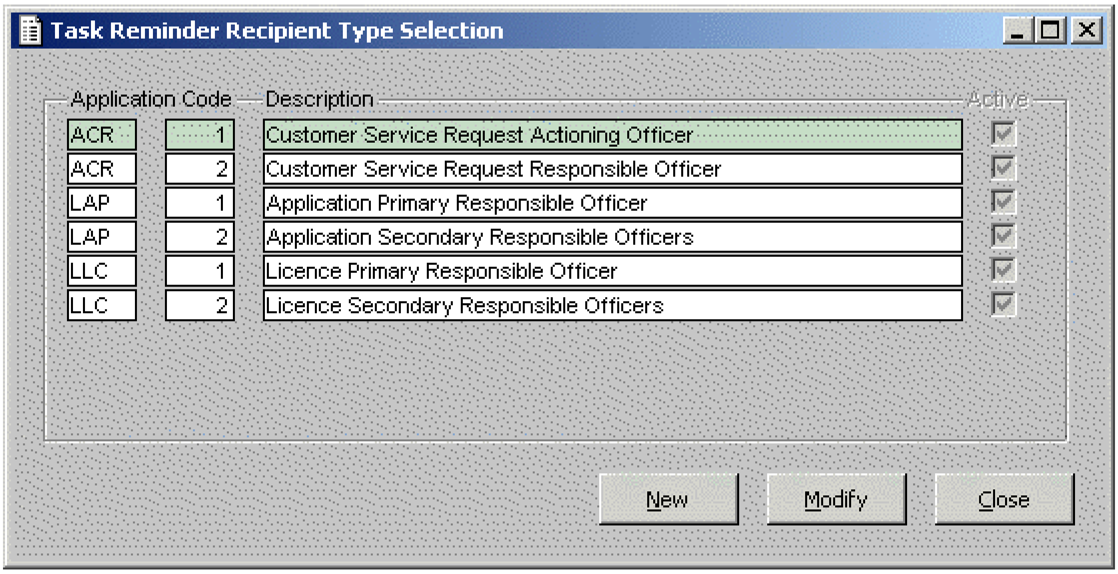
Application Code
These fields display the Application Code and Recipient Type Number for all available Task Reminder Recipient Types.

Description
This field displays the Description for all available Task Reminder Recipient Types.

Search Profile – Application Code / Recipient Type Number / Description
These fields allow search criteria to be entered to perform a search over the available Task Reminder Recipient Types. This function is useful when there are more than nine occurrences. Wildcard searching is available.

Task Reminder Recipient Type Selection Form

The *Task Reminder Recipient Type Selection* Form displays the results of the search conducted via the *Task Reminder Recipient Type Search Profile* form. While Recipient Types are Infor-defined, users are free to maintain the *Description* field and *Active* flag.

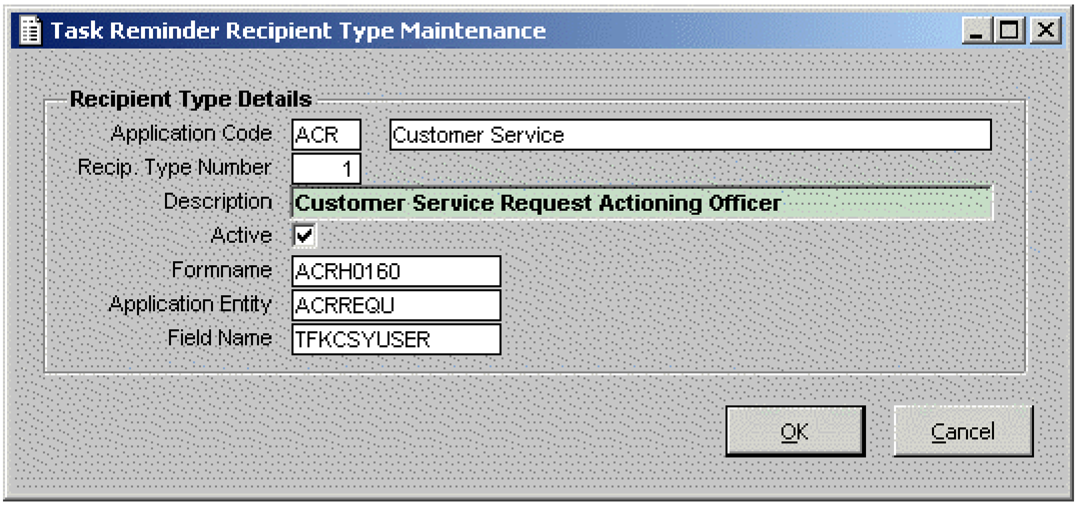


Task Reminder Recipient Type Selection Form

Application Code / Recipient Number / Description/Active
These fields display the results of the search conducted in the Search Profile.

Task Reminder Recipient Type Maintenance Form

The Task Reminder Recipient Type Maintenance form contains details on Recipient Types. System – defined Recipient Types are not able to be modified except for the Description and Active flag.



Task Reminder Recipient Type Maintenance form

Application Code
These fields contain the Application Code and Description of the selected Recipient Type. These fields cannot be maintained in system-defined Recipient Types.

Recipient Type Number
This field contains the Recipient Type Number. This field is not maintainable in system-defined Recipient Types.

Description
This field contains a Description for the Recipient Type. This field is maintainable.

Active
Check this flag ON to make the Recipient Type active and available for selection in Task Reminder Parameters.

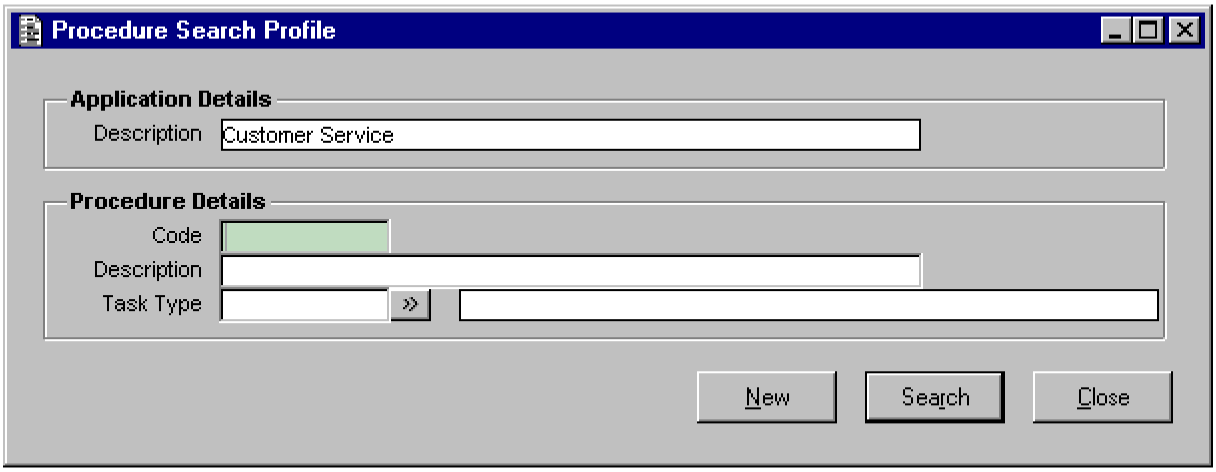
Form Name / Application Entity / Field Name

These fields contain the Form Name, Application Entity and Field Name pertaining to the Recipient Type.

Procedure Search Profile Form

This form is presented when the Procedure Maintenance button is pressed on the Work Flow Parameters form.

This form allows you to search for Procedures via the Procedure Code, Procedure Description or alternatively you may select a Task Type and all Procedures that have that Task Type selected will be displayed.



Procedure Search Profile Form

Application Details – Description

This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

This field is display only and may not be maintained.

Code

Enter a code (or part thereof) on which to base your search. Full wild card searching is available on this field.

Description

Enter a description (or part thereof) on which to base your search. Full wild card searching is available on this field.

Task Type

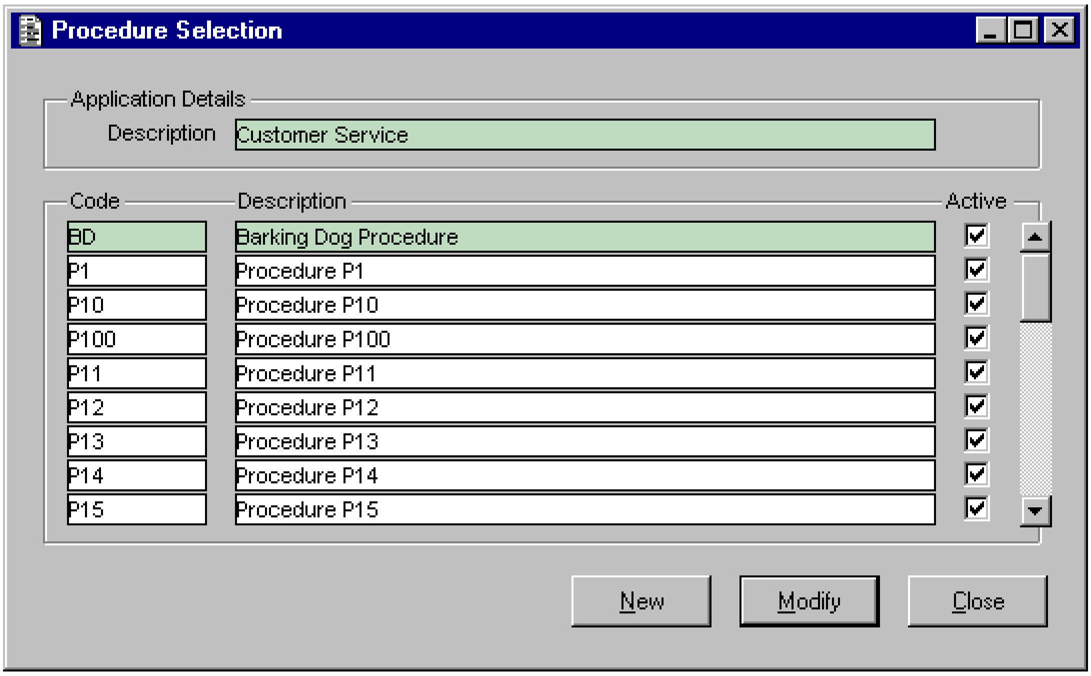
This field will allow the entry of a valid Task Type. You may also select a valid Task Type from the Task Type Pop Up form by press the pop up button associated with the field.

The purpose of this field is to allow the user to display only those Procedures that contain the specific Task Type.

Procedure Selection Form

This form displays all Procedures that match the search profile entered.

From this form you may select a Procedure to modify or create a new Procedure.



Procedure Selection Form

Application Details – Description

This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

This field is display only and may not be maintained.

Code & Description

These fields display the Procedure Code and Description for the listed procedures. These fields are display only and may not be maintained.

Active

This field displays whether or not the Procedure is available for use by the system. If the flag is not checked ‘On’ then the Procedure will not be available for use.

Procedure Maintenance Form

A Procedure is a logical group of tasks to be performed in a specified order.

In Customer Service the Procedure name is assigned to the Customer Request Type and is used to automatically load Tasks to a Customer Service Request record.

In Applications the Procedure name is assigned to an Application Type and is used to automatically load Tasks on to an Application record.

A Procedure may also be nominated at the individual record level to insert a new group of tasks.

This form allows you to assign Tasks to a Procedure.

This form also controls how a Task is Started within Work Flow. Two methods of starting a task exist.

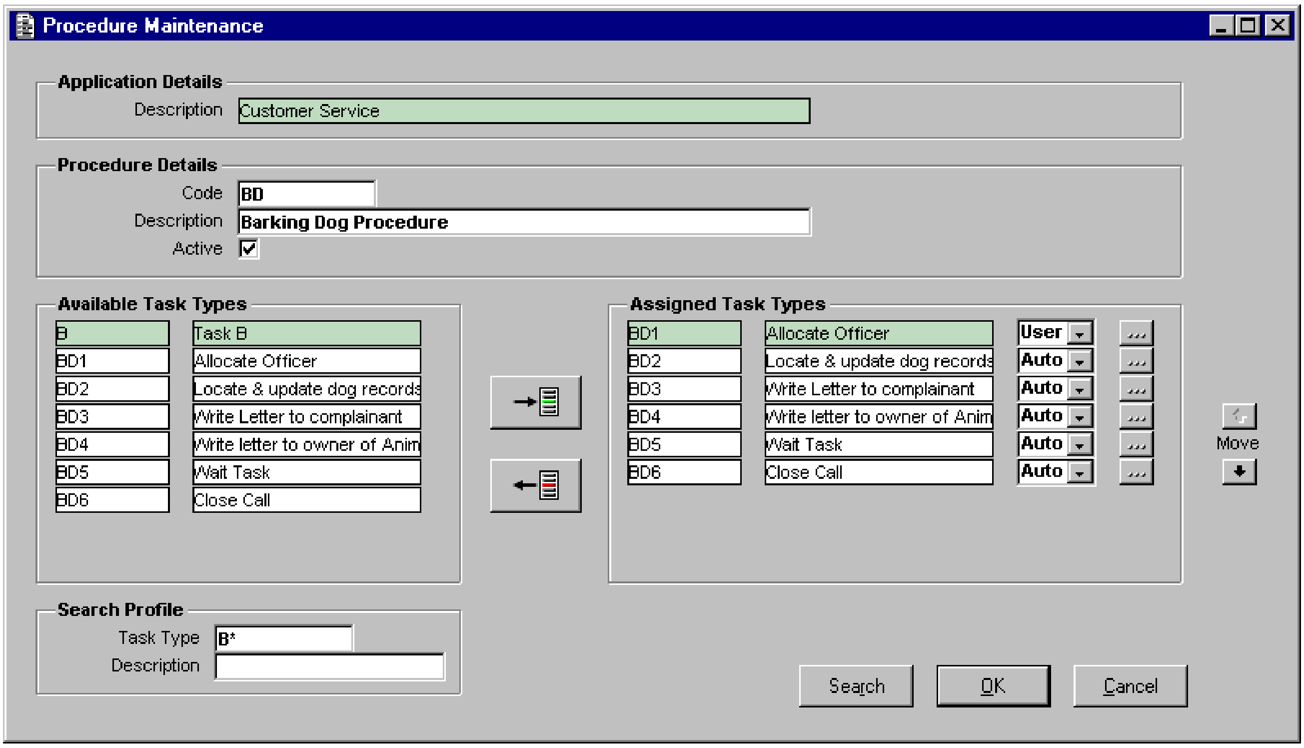
Task Initiated by

- a User (User)
- the completion of a previous task (Automatic)
- the creation of the originating record (Automatic)

For each Procedure a combination of User and Automatic initiation methods may be used.

Tasks are assigned to the right hand column and allocated an initiation method.

The order displayed in the assigned list is not necessarily the order in which they will be executed



Procedure Maintenance Form

Application Details – Description
This field displays the Application Description for which you are setting up Work Flow. In the case of the Applications Module this field will display the Class Description e.g. Building Applications.

Code
This field contains a unique ten character code for the procedure.

This field is mandatory.

Description
This field contains a fifty character description for the procedure.

This field is mandatory.

Active
If this flag is turned on then the Procedure is available for use.

If this flag is turned off then the Procedure will no longer be available to the system.

Available Task Types
This column displays a list of all available Tasks that may be assigned to the procedure.

When a Task is assigned note that it still remains in the available list. This enables the same Task to be assigned more than once to the Procedure.

To assign a Task to the Procedure press the Select Button.

Assigned Task Types
This column displays a list of all assigned Tasks to the Procedure.

The Tasks in this column will be loaded to the application record automatically whenever the Procedure is initiated. (e.g. by creating a Customer Request where a Procedure code has been specified, or by selecting Insert Procedure when maintaining tasks for a record.)

Press the Remove Button to de-assign a Task from the Procedure.

Note that when a Task is moved or re-sequenced that has Previous or Next Tasks assigned, a message is displayed informing the User that they will need to view these Tasks and change where necessary.

Initiated User/Auto

This field determines what mechanism will be used to Start the Task.

The default for the drop down is User.

Initiated by – Auto

When a task is nominated as an Initiated (Auto) task then the task will have the Estimated Start Date/Time updated at the point of the Task creation during the loading of a Procedure. The Actual Start Date/Time will be updated when the Task is started. See the following example:

Example:
At Request Entry, if the Request Type selected has a workflow procedure (with auto start tasks) attached, the attached procedure will be inserted once the Request is saved (e.g. when an option button is selected), however, the auto start tasks will not be fired until the OK or Cancel button is selected.

If fast exit (F3) is used on the forms that are called via the Request Entry option buttons, the auto start task will not be fired.

If the Task has linked Previous Tasks then it is not started at Task creation, but rather at completion of the last Task linked as a Previous Task.

If the current User is the Responsible Officer then any Actions that have been designated as Start Actions will be initiated.

If the current User is not assigned as the Responsible Officer (and no Responsible Officer has been nominated on the Task) then the system will check to see if the current user is contained within the Group assigned to the Task. If the current user is assigned any Actions that have been designated as Start Actions will be initiated.

If the current user is not authorised to the Task (or the Actions) then only the Actual Start Date/Time will be written. No Start Actions will be performed.

Initiated by – User

If a Task is flagged to be initiated by the User then the Task must be started manually (i.e. press the Start Task Button). The Task may be started at any time provided any linked previous tasks that exists have been completed.

Only a User that is authorised to the Task may Start the Task. Any Actions that have been designated as Start Actions will be initiated.

Detail Button

Pressing this button will present the Previous/Next Task Maintenance Form.

Search Profile - Task Type / Description

Enter a Task Type Code and/or Description on which to search. The ability to search for Task Types is useful when there are more than 9 Task Types in the list.

Previous/Next Task Maintenance Form

This form allows you to select (for the current Task) what Task(s) must be completed before this Task (Previous) and what Task(s) are started automatically on completion of this Task (Following).

No Relationship Between Tasks

If you do not require a relationship between tasks, then do not assign any tasks to the 'Previous' or 'Next' sections. This would only apply to those tasks where they may be started and completed in any order.

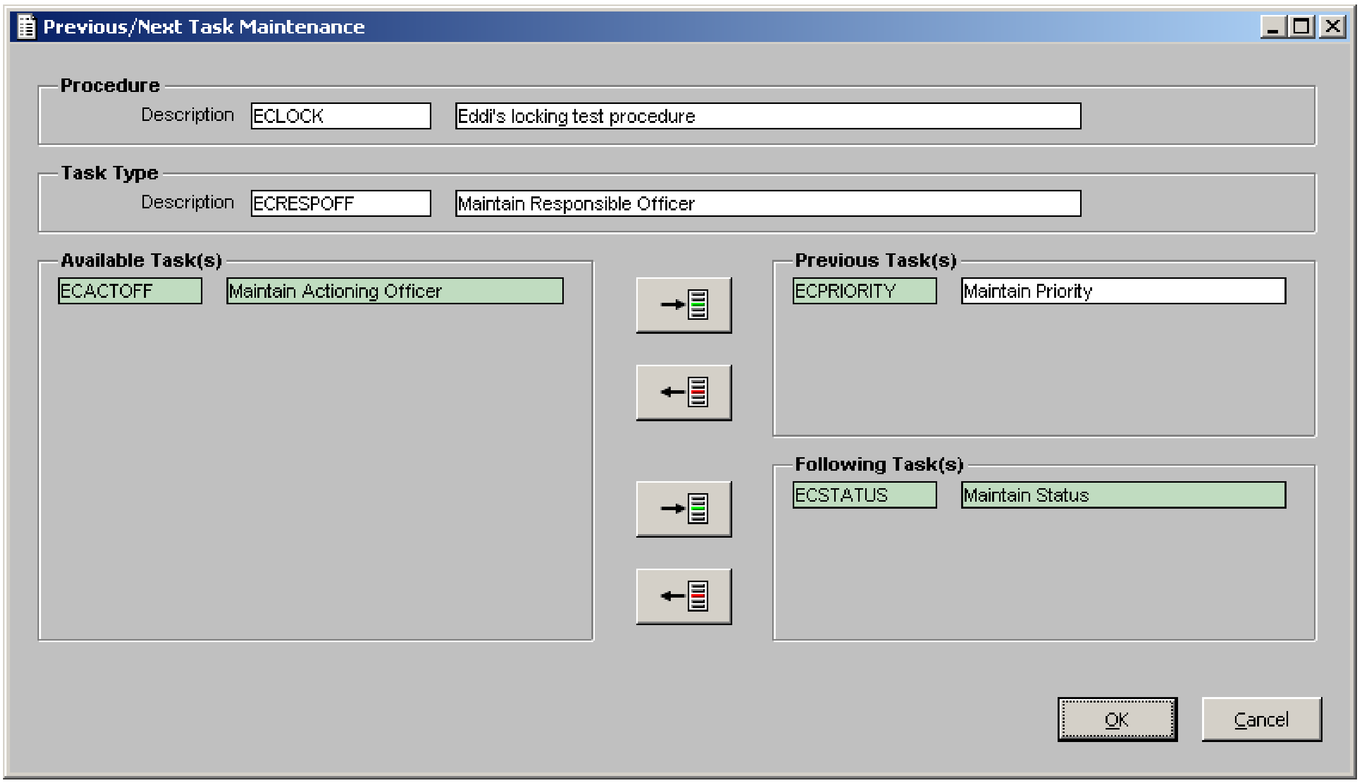
Concurrent Tasks

Where two (or more) tasks are to be performed concurrently prior to the execution of another task then both tasks are nominated as Previous Tasks.

When calculating the due date for completion of a customer request the system will assess all concurrent tasks and take the maximum time from a single task.

Example
Task 1 (10 working days) and Task 2 (11 working days) must be completed prior to starting Task 3.
Open this form for Task 3. Nominate both Task 1 and Task 2 as Previous Tasks to Task 3.
The effect of doing this will be that :-

- 11 working days only will be used in the calculation of the due date for completion of a customer request.
- Both Task 1 and Task 2 must be completed prior to starting Task 3.



Previous/Next Task Maintenance Form

Procedure
This field displays the code and description of the Procedure currently being maintained.

This field is display only and may not be maintained.

Task Type

This field displays the code and description of the Task to which you are assigning Previous and Following Tasks.

This field is display only and may not be maintained.

Available

This list displays all available Tasks for the Procedure that may be assigned as either a Previous or Next Task.

To select a Task as a Previous Task press the Select Previous Task Button (adjacent to the Previous Task(s) list)

To select a Task as a Following Task press the Select Following Task Button (adjacent to the Following Task(s) list)

This field is display only and may not be maintained.

Add / Remove Previous Tasks

Use the Add / Remove Buttons to move Tasks into or out of the Previous Task Area.

Previous Task(s)

This list displays all Tasks that have been nominated as Previous Tasks for the Current Task.

This means that before the Current Task can be started the nominated Previous Tasks must ALL have been completed.

Note that when maintaining the First Task it is not possible to nominate a Previous Task.

Add / Remove Following Tasks

Use the Add / Remove Buttons to move Tasks into or out of the Following Task Area.

Following Task(s)

This list displays all Tasks that have been nominated as Following Tasks for the Current Task.

NOTE: When maintaining the Last Task that it is not possible to nominate a Following Task.

Maintenance

The following topics are covered in this section:

Application Task Maintenance
Workflow/Timesheets
Workflow Task Search Profile
Activity Code Maintenance
User Parameter Maintenance
Timesheet Search/Enquiry Menus
Update Unstarted Tasks and Actions

Application Task Maintenance

There are two ways of accessing and maintaining task information.

- Via an Application Record e.g. Customer Request
- Via the In-Tray concept.

This section describes all forms within the Work Flow process and how they relate to the Customer Service Module.

Task Summary Form

This form is presented when the Tasks Button is pressed from a Customer Request record.

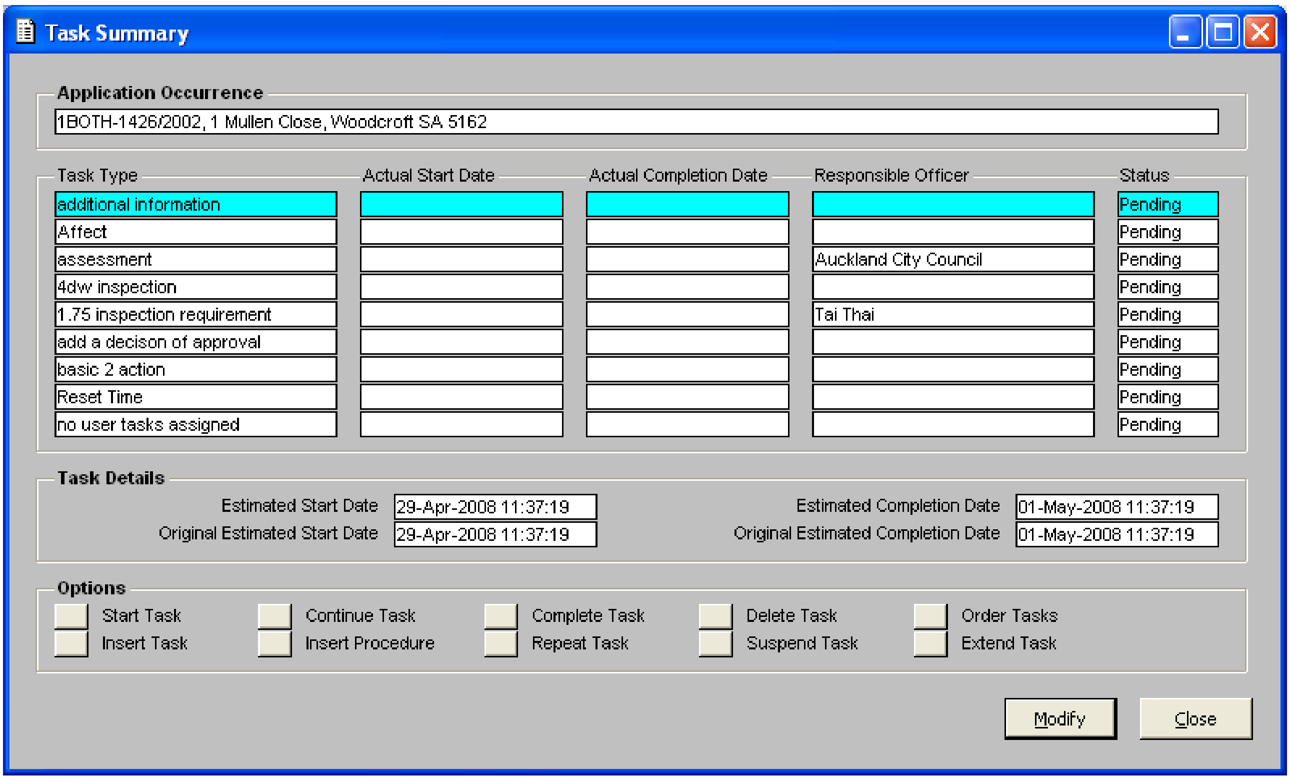
All Tasks for the Customer Request are displayed in Estimated Start Date/Time order.

The form is broken up into four sections. The top section contains the description of the record to which the Tasks are linked.

The second section describes each of the tasks in summary form.

The third section displays further details for individual tasks. As you click on each task further details will be displayed in the bottom section.

The bottom section provides specific maintenance options that may be performed on this form.



Task Summary Form

Functionality associated with the Authorised Function: 'Status Codes at Request Type Level'.

Executing a Task with a User Action which has System Action = STATUS

New functionality has been added to cater for a 'Request Type' which can now be entered when defining the Action Parameters for a User Action with System Action = STATUS.

NOTE: This functionality will only be available if the new authorised unction 'Status Codes at Request Type Level' is authorised. For those sites not authorised, the existing functionality remains unchanged.

The following details how each of the four possible scenarios is implemented:-

1. If neither a Request Type nor a Status Code was nominated for the User Action

   The Status Code Popup is presented so a Status Code can be selected

   If the Authorised Function is authorised
   - If one or more Status Codes has been assigned to the selected Request Type, then only those Status Codes that have been assigned to the Request Type will be valid and will display in the Pop Up form.
   - (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes will be valid/displayed in the Pop Up form)

   Where the site does not have authority to the new functionality
   - Existing functionality will apply i.e. all Status Codes will be valid / displayed in the Pop Up form)

2. If a Request Type was not nominated but a Status Code was nominated for the User Action.

   If the Authorised Function is authorised
   - The Status Code change will only be implemented if the nominated Status Code is valid for the Request Type of the selected Request. i.e. If one or more Status Codes has been assigned to the Request Type of the selected Request, then the nominated Status Code must be one of the assigned Status Codes otherwise an error will be issued and the Status change will not take place.

   - If no Status Codes have been assigned to the Request Type of the selected Request, then existing functionality will apply – i.e. all Status Codes are valid so the Status Code change will be executed.

   Where the site does not have authority to the new functionality
   - Existing functionality will apply – i.e. all Status Codes are valid, so the Status Code change will be executed.

3. If a Request Type was nominated but a Status Code was not nominated for the User Action.

   If the Authorised Function is authorised
   - The Status Code change will only be implemented if the nominated Request Type matches the Request Type of the selected Request.

   - The Status Code Popup is presented so a Status Code can be selected

   - If one or more Status Codes has been assigned to the selected Request Type, then only those Status Codes that have been assigned to the Request Type will be valid and will display in the Pop Up form.

   - (If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status codes will be valid/displayed in the Pop Up form)

   Where the site does not have authority to the new functionality
   - This scenario does not apply because the Request Type field is not available when defining the User Action under these circumstances.

4. If both a Request Type and a Status Code were nominated for the User Action

   If the Authorised Function is authorised

   - The Status Code change will only be implemented if the nominated Request Type matches the Request Type of the selected Request and the nominated Status Code is valid for the Request Type of the selected Request. i.e. If one or more Status Codes has been assigned to the Request Type, then the nominated Status Code must be one of the assigned Status Codes otherwise an error will be issued and the Status change will not take place.

   - If no Status Codes have been assigned to the Request Type, then existing functionality will apply – i.e. all Status Codes are valid, so the Status Code change will be executed.

   Where the site does not have authority to the new functionality

   - This scenario does not apply because the Request Type field is not available when defining the User Action under these circumstances.

Note: This new validation will occur regardless of where the Task is executed from.
i.e. Customer Services >> Request Entry, [Tasks]
Applications >> Application Maintenance, Workflow pulldown
Licensing >> Licensing Maintenance, Workflow pulldown
Workflow >> Workflow/Task In Tray

Application Occurrence
This field displays the description of the record to which the Tasks are linked.

This field is display only and may not be maintained.

Task Type
This field displays the description of the task to be performed. This description is user definable and is established in Task Type parameter maintenance.

This field is display only and may not be maintained.

Actual Start Date
This field displays the actual date and time the task was started.

A task is started either manually by a user or automatically by a preceding task.

This field is display only and may not be maintained.

Actual Completion Date
This field displays the actual date and time the task was completed.

A task is completed manually by a user.

This field is display only and may not be maintained.

Responsible Officer
This field displays the officer's name that is responsible for the task (if an officer has been allocated).

This field is display only and may not be maintained.

Status
This field displays the Status of the Task. This will either be Complete, Pending, Re-instated, Suspend or Overdue.

This field is display only and may not be maintained.

Task Details - Estimated Start Date
This field displays the current estimated start date and time for each task.

The value in this field may not necessarily be the same as the original estimated start date.

The value in this field is recalculated if additional tasks are added or tasks are deleted.

This field is display only and may not be maintained.

Task Details - Original Estimated Start Date
This field displays the original estimated start date and time for each task.

The value in this field is calculated when tasks are initially assigned to the record. The value, once calculated, is never changed.

This field is display only and may not be maintained.

Task Details - Estimated Completion Date
This field displays the current estimated date and time on which the task should be completed.

The value in this field may not necessarily be the same as the original estimated completion date. The value in this field is recalculated if additional tasks are added or tasks are deleted.

This field is display only and may not be maintained.

Task Details - Original Estimated Completion Date
This field displays the original estimated completion date and time for each task.

The value in this field is calculated when tasks are initially assigned to the record. The value, once calculated, is never changed.

This field is display only and may not be maintained.

Options - Start Task
Pressing this button will start the selected task.

All Actions nominated as “Start” actions will be performed. The Actual Start Date of the task will be updated with the current system date and time.

The task will not be started if:

- dependent previous tasks have not been completed
- the task is already started
- you are not authorised to this Task.

Options - Continue Task
Pressing this button will continue the selected task.

The Continue button will perform any Start Actions that have not previously been completed or in the case of a Task that has been suspended will re-start / re-instate the suspended Task. Where the Suspend Record had no ‘Suspend To’ date it will be updated with Today’s date. Where there was a ‘Suspend To’ date it will be changed to today’s date.

The task will not be continued if:

- the task has not been started
- you are not authorised to this Task.

Complete Task
Pressing this button will complete the currently selected task.

All Actions nominated as “End” actions will be performed. Any dependent next tasks will be automatically started (if their “Initiated By” status is Auto). The Actual Completion Date of the task will be updated with the current system date and time.

The Task will not be completed if:

- the task has not been started

- there are any outstanding “Start” actions (in which case you should choose Continue Task)
- you are not authorised to this Task

An email with a ‘Pathway.pth’ attachment will be sent to the Responsible Officer of the following linked Task advising them that a Task has been allocated to them. The Responsible Officer will be able to 'Open' the attachment and have the associated Task opened in Task Maintenance. The user may review the Task and take any action as required, then close the form. Closing the form will end the session. Please note that a Pathway session will need to be active for the attachment to function correctly.

Options - Delete Task
Pressing this button will delete any tasks that are not required.

Tasks may not be deleted if:
- the task has been started and you do not have the appropriate authority
- permission has not been granted at the system level.

There are two levels of user Delete authorisation.
- Deletion of any Task regardless of status.
- Only deletion of Tasks that have not been started.

Options – Order Tasks
This allows the user to re-order the sequencing of tasks. Highlight task and use up and down arrows to re-sequence.

Options - Insert Task
Pressing this button will allow you to insert an additional task onto the task list. The task is relevant to the current cursor position. A message will be displayed as to whether you wish to link the task before or after the current task.

You may not insert a new Task before a Started Task.

The task you wish to insert must be selected from the Task Type Pop Up form.

If you are inserting a Task where the currently selected task has not been started or completed then the following message will be displayed:

How would you like to link to the selected task. Before, After, Neither, Cancel

Selecting Before

The Task Insertion Maintenance form will be presented with the previous tasks of the current task displayed. You may, if required, select that task to now be the previous task of the new task you are inserting. The way the new task is to be initiated is also available on this form. The default is User.

The Estimated Start Date/Time of the new Task is taken from the Estimated Completion Date/Time of the previous task.

Selecting After

The Task Insertion Maintenance form will be presented with the following task(s) of the current task displayed. You may, if required, select that task(s) to now be the following task(s) of the new task you are inserting. The way the new task is to be initiated is also available on this form. The default is User.

The Estimated Start Date/Time of the new Task is taken from the Estimated Completion Date/Time of the current task.

Selecting Neither

The Task will be inserted into the list in Estimated Start Date/Time order. The Estimated Start Date/Time of the new task is copied from the Estimated Start Date/Time of the task that had 'focus' when Insert Task was pressed. This also means that the task must be started manually by the user (the default "Initiated By" value is User) and on completion of the Task no other task will be automatically started.

Selecting Cancel

Selecting Cancel will cancel the Insert Task function and you will be returned to the Task Summary.

If you are inserting a Task where the currently selected task has already been started then the following message will be displayed:

Do you want to link after the selected task or to nothing? After, Nothing, Cancel

Selecting After

The Task Insertion Maintenance form will be presented with the following task(s) of the current task displayed. You may, if required, select that task(s) to now be the following task(s) of the new task you are inserting. The way the new task is to be initiated is also available on this form. The default is User.

The Estimated Start Date/Time of the new Task is taken from the Estimated Completion Date/Time of the current task.

Selecting Nothing

The Task will be inserted into the list in Estimated Start Date/Time order. The Estimated Start Date/Time of the new task is copied from the Estimated Start Date/Time of the task that had 'focus' when Insert Task was pressed. This also means that the task must be started manually by the user (the default "Initiated By" value is User) and on completion of the Task no other task will be automatically started.

Selecting Cancel

Selecting Cancel will cancel the Insert Task function and you will be returned to the Task Summary.

When inserting a Task the Estimated Start and Completion Dates of remaining tasks will be recalculated.

A Task may not be Inserted if:
- permission has not been granted at the system level.

Options - Insert Procedure

Pressing this button will allow you to insert a group of tasks (via a Procedure) onto the task list. The tasks to be inserted are relevant to the current cursor position. A message will be displayed as to whether you wish to insert the tasks before or after the current task.

The procedure you wish to insert must be selected from the Procedure Pop Up form.

The form Previous/Next Task Maintenance will then be presented to enable the establishment of dependencies between tasks.

A Procedure may not be Inserted if:
- permission has not been granted at the system level.

Options - Repeat Task

Pressing this button will allow you to repeat the current task. The repeated task will be given an Estimated Start Date/Time of the original Task's Estimated Completion Date/Time. If the original task is already completed then the repeated task will be given an Estimated Start Date/Time of the Actual

Completion Date/Time of the original task. If you wish to repeat the task later in the task list then you should choose Insert Task.

Selecting this option will not display a dialogue box about how to link the Task. The repeated Task will simply be inserted after the selected Task.

A task may not be Repeated if:

- permission has not been granted at the system level.

Options - Order Tasks

Where the Task sequencing parameter at the Application level has been set to “As Entered”, the ‘Order Tasks’ option will appear on the Workflow Task Summary form and will allow those authorised users to modify the currently displayed sequence of Tasks for an individual Workflow instance. This is often useful where additional tasks or procedures have been inserted and the displayed sequence is no longer what is required.

Options – Suspend Task

The Suspend Task is an ‘Authority’ option and is only assigned to the required Users. Selecting this Option displays the Suspend Task Details Selection form showing any existing suspend records for the Task. Existing Suspend records can be modified or new suspend records added. The Suspend Task option can only be selected when the Task has been started.

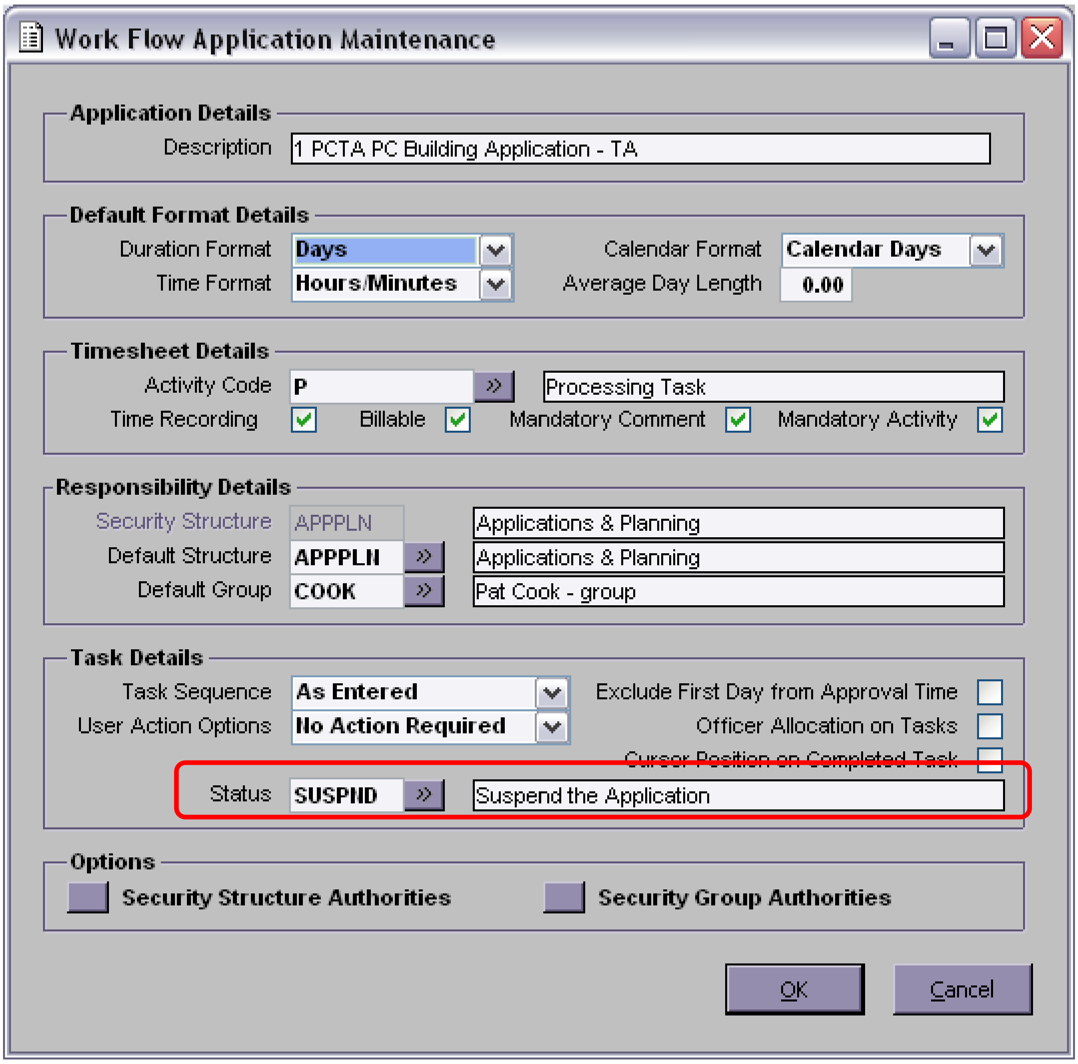
Application & Licencing Only

Suspended Task Update Of Applications

The Status of an Application can now be changed based on a Task being suspended and then having the original Status of Application be reverted to once the Suspension is removed or the Suspension date ends.

A new field ‘Status’ is available for Application Parameters on the Work Flow Application Maintenance form.

Application Parameters >> Workflow Parameters >> Workflow Application Maintenance



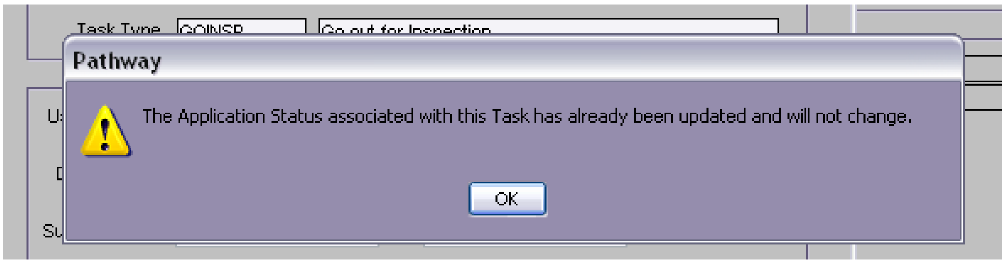
The Status codes available are those from the Status Codes via Application Class Parameters.

When a Status Code has been selected and populates this parameter field, the following occurs.

Upon the entry of a Suspension on a Task, the Application Status is changed to that of the parameter setting. An Asynchronous Batch job is created to change the Application Status back once the Suspension is over. If the Suspension has not started yet (e.g. the suspension starts in two days time) then an asynchronous Batch Job is created to start the Suspension on the Start time. The Batch queue set up for Workflow, CWF, in parameters is the Batch queue used for this purpose.

When the Suspension is removed, changed to the past or ends, the Application Status reverts back to the previous Status before the Suspension was added.
The system stores the previous Status code prior to the Suspension being added.

If an additional workflow action that is to change the Status of an Application is actioned, then the user is presented with a warning advising that the Application Status is set to one that indicates a Task has been suspended and prevents the Status change from occurring.



Where a Status Code is NOT selected and the parameter field remains blank, the following occurs.

Upon the entry of a Suspension on a Task, the Application Status remains as it was.

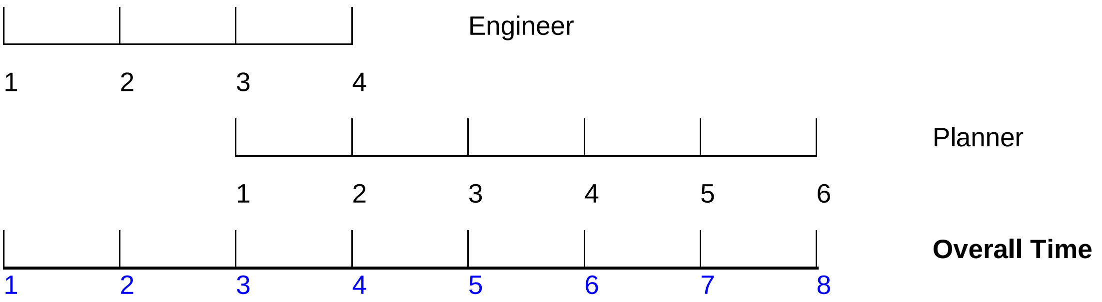
When the Suspension is removed or ends the Status does not change.

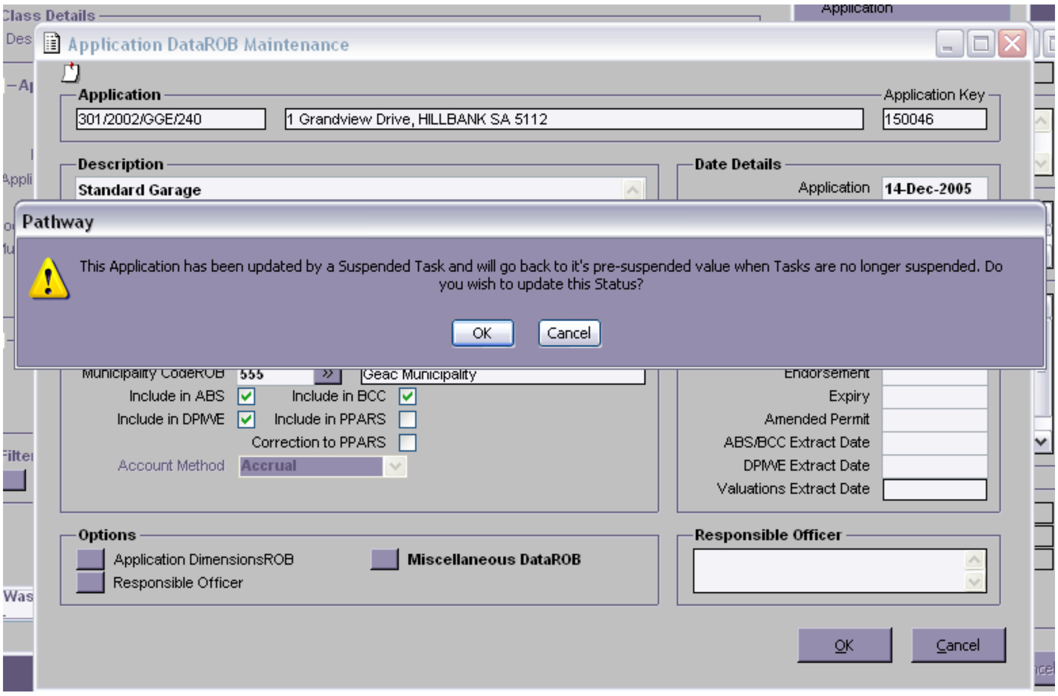
Where an additional workflow action that is to change the Status of the Application is invoked then the Status of the Application changes accordingly.

Multiple And Overlapping Suspensions On Any One Task

Pathway now allows multiple Suspension Records to be added to any one Task at a time and also allows overlapping Tasks.

The “stop the clock” time calculations for these overlapping tasks are the overall time – i.e. from the beginning of the first suspension to the end of the last suspension. An example is show below.





If the user tries to modify the Status of an Application is modified and it is currently modified by a Suspended Task then the following message is displayed:

“This Application has been updated by a Suspended Task and will go back to it’s pre-suspended value when Tasks are no longer suspended. Do you wish to update this Status?”

Selecting OK will allow the Status to be changed while selecting Cancel will retain the current Status.

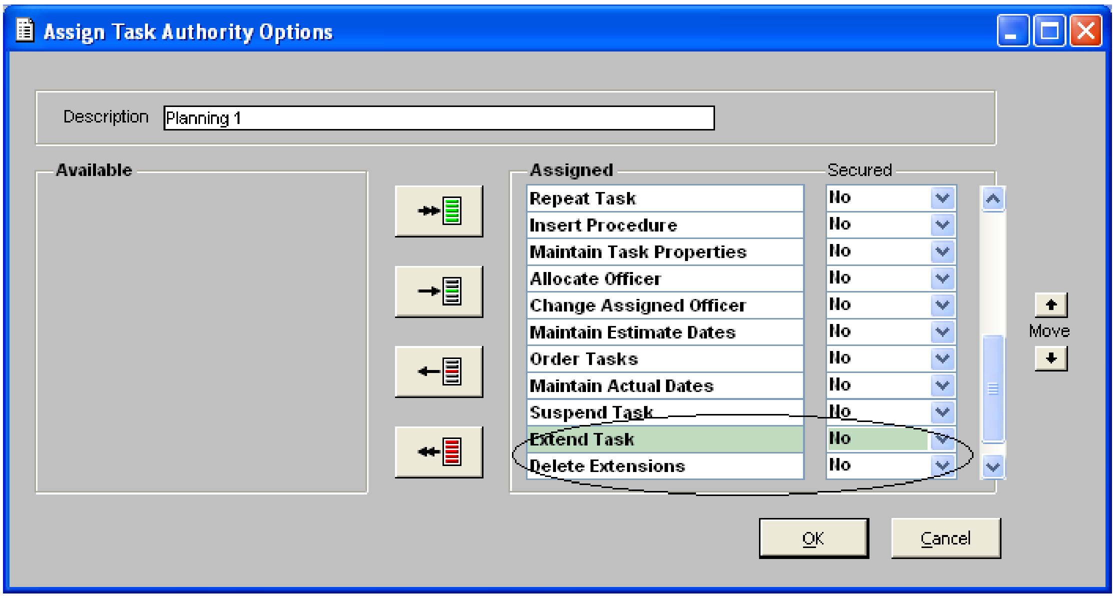
Options – Extend Task
NOTE: This function is only available for applications.
This field allows entry into the Extend Task Details form.

Extension Of Time
It is a requirement that a Task can be extended based on legislative days for a particular Application Type. The Application Parameters and Task Maintenance are changed to cater for this requirement.

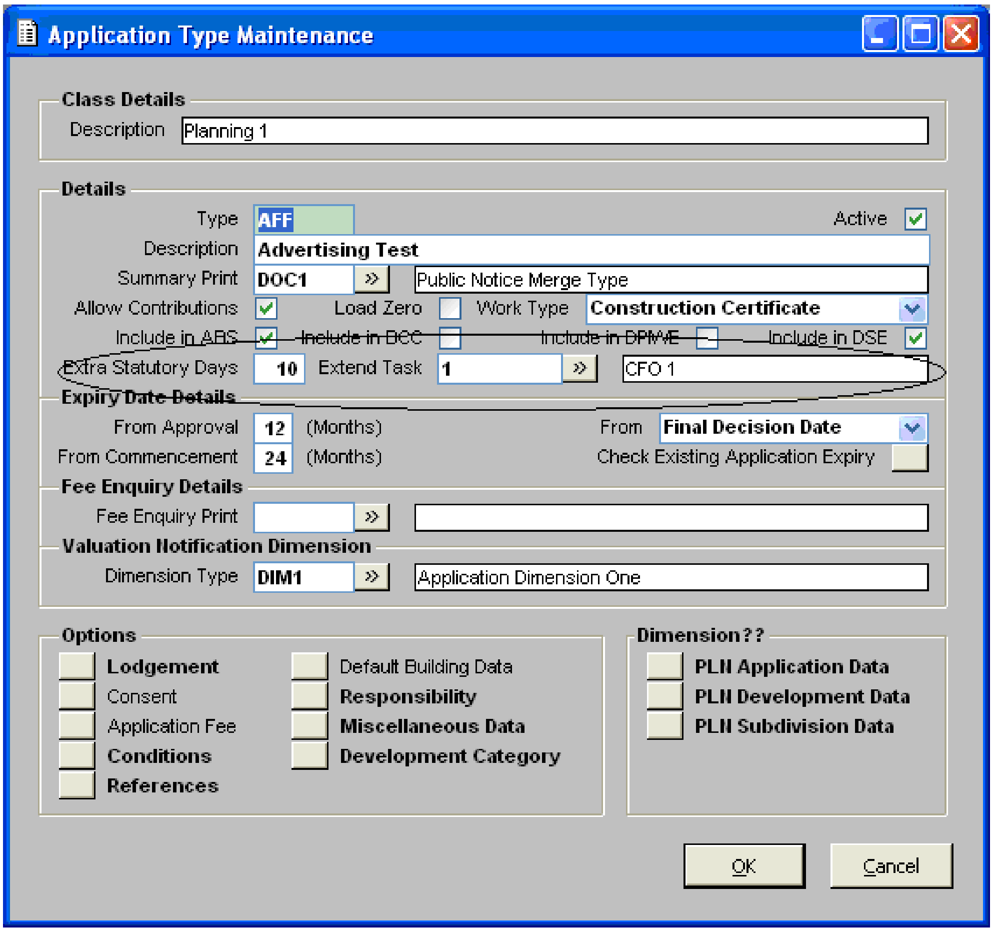
Application Parameters:
Application Parameters are required to be set up in order for an Extension of Estimate Completion Date to be applied to an Application Task.

Authorities
Two more authorities of “Extend Task” and “Delete Extension” are now available to include in the Workflow Application Maintenance: “Extend Task” allows a new extension record be assigned to a Task while the “Delete Extension” allows Users to remove the Extend Task record by pressing F11 while displaying the Extension Details.

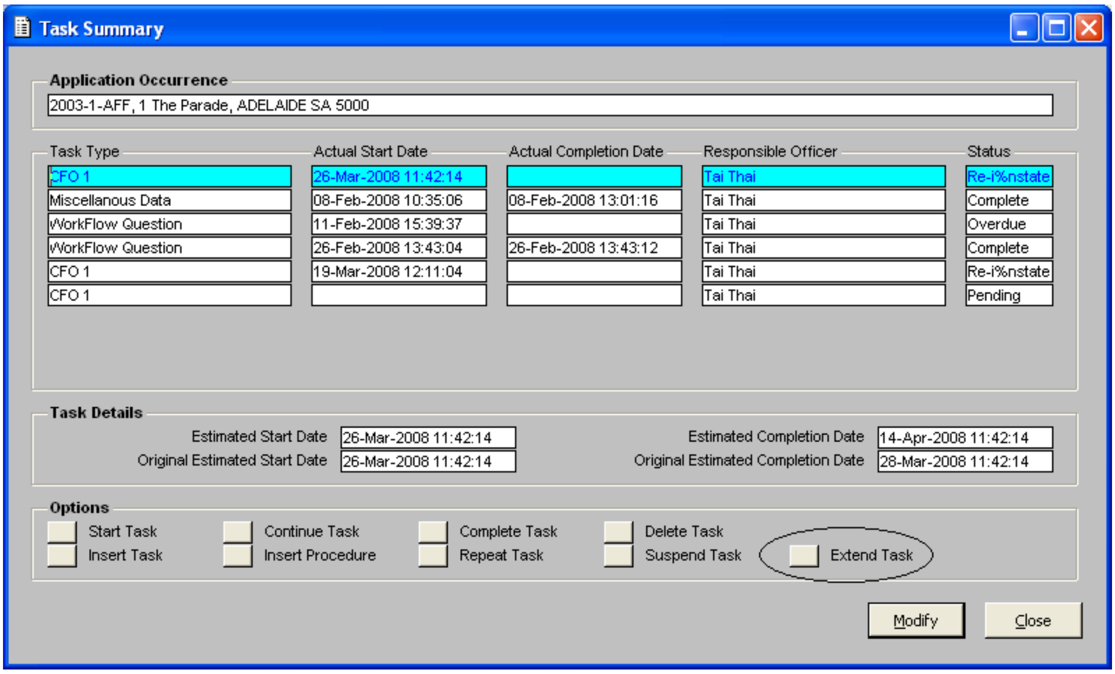
The Work Flow Application Maintenance screen can be displayed by selecting the Workflow Option in Application Parameters. New Authority Options are now available to select into the Security Structure. After including these two new options in the “Security Structure Authorities”, they become available to assign to Responsibility Groups in “Security Group Authorities”.

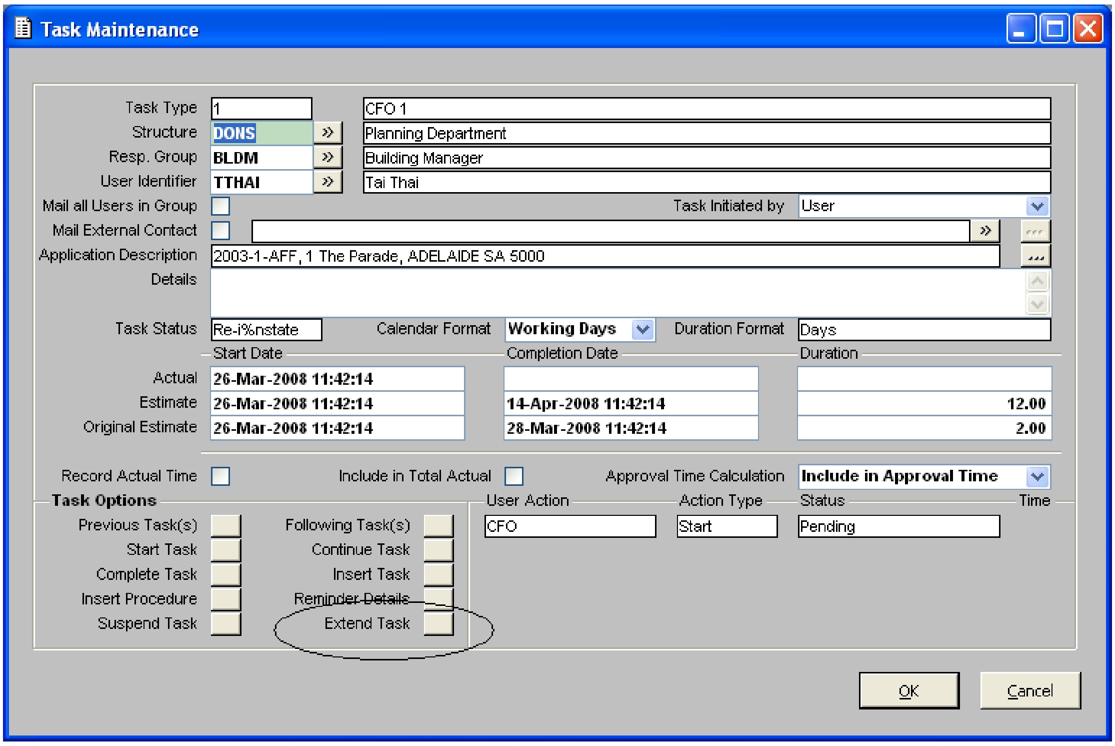


Application Type Parameters
The Application Type Maintenance now has a field of “Extend Task” which indicates which Task can be extended and a field of “Extra Statutory Days” which indicates the number of days to be extended.



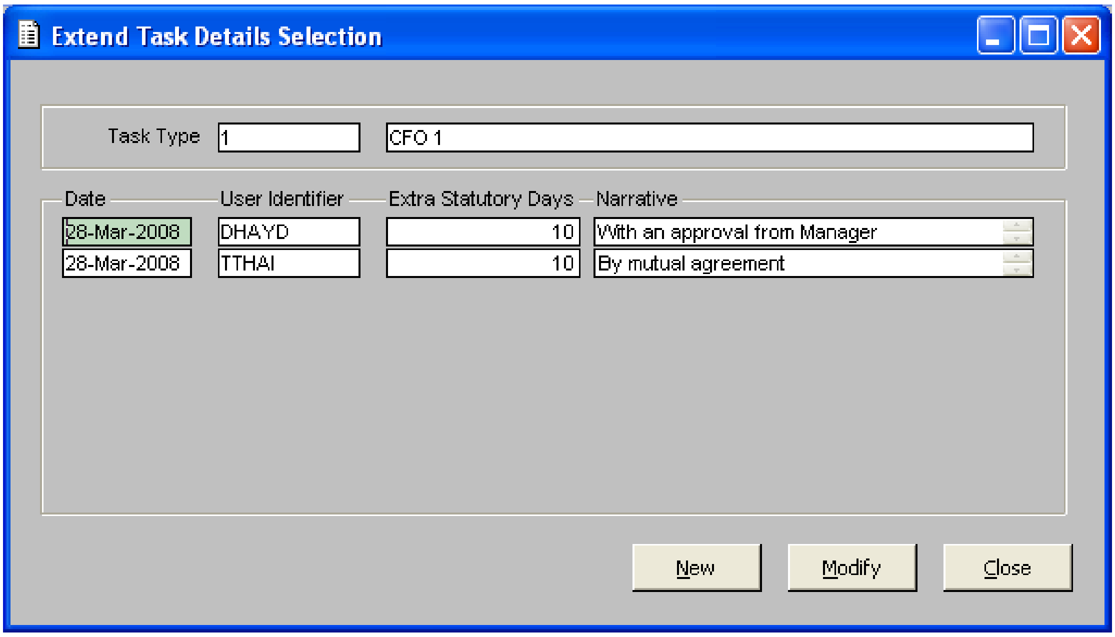
Application Maintenance:
An additional Button of “Extend Task” is now available on the Task Summary and Task Maintenance forms for Users that have authority to extend the specific Task.



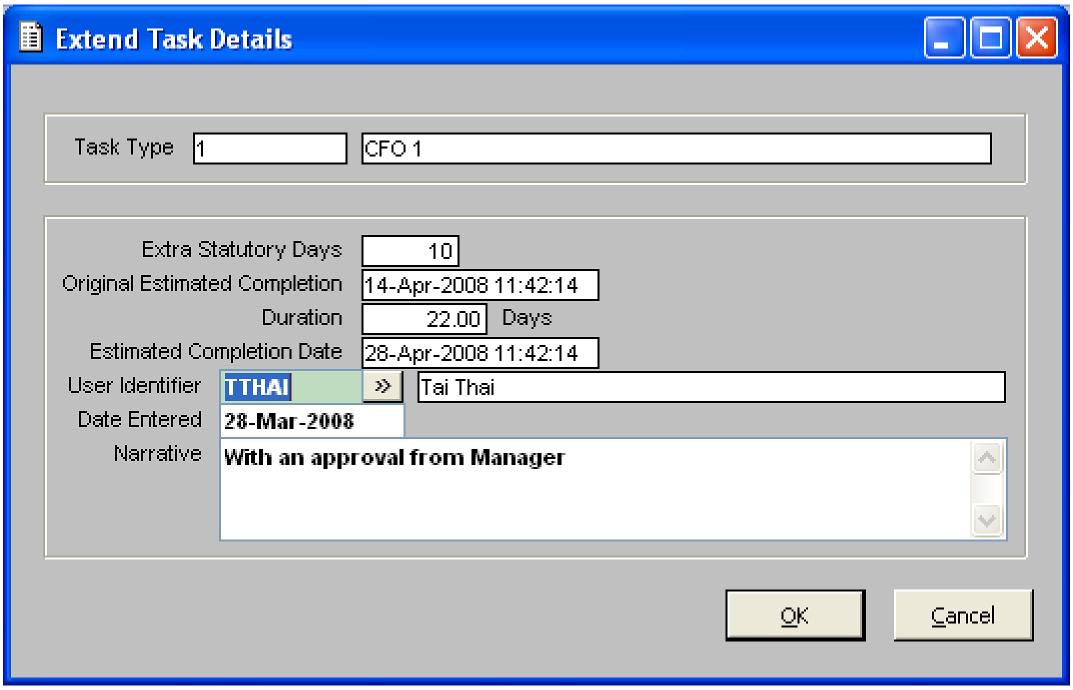


When the Extend Task Option is selected a new Extend Task Details Selection form is displayed with all records of existing Extensions applied to a particular Task.

On the Extend Task Details Selection form, summary of all Extension Records with details of Date Entered, User Identifier, Number of Days to be extended and Narrative are shown.



An Extend Task Details screen is displayed when a new Extension is added or an existing Extension is selected to modify.



On the Extend Task Details screen, some fields are only displayed such as Extra Statutory Days, Original Estimated Completion, Duration (which is a sum of Original Estimate Duration with total of Extra Statutory Days) and Estimated Completion Date (which is calculated by advancing the Estimate Starting Date with total of Extra Statutory Days and total of Suspended times), while details of fields such as User Identifier, Date Entered and Narrative are maintainable.

When the Extension record is accepted the Estimated Duration and Estimated Completion Date of the Task on the Task Summary or Task Maintenance screens are updated with new values.

Application Task Reports:
The Detailed Task Report and the Detailed Application Task Report have been modified to include details of Extensions for the Tasks.
For each Extension the following details are shown

Extension Entered Date,
User ID of who added the Extension,
Extension Narrative,
Number of Extension Days,
Original Estimated Completion prior applying the Extension,
and Estimated Completion after applying the Extension.

Some new fields are also included in the Task such as:

Total Extension Days,
Total Legislative Days (The sum of Original Task Estimate and Total of Extension Days),
and Legislative Due Date.

Word Processing:
The new field “WF_Appl_Extension” is included in the Extract Fields of the Application Module and can now be included in a Merge Document.

A new Extract of “EXTTASK” (Extension of Task) has also been created for the Application Module and is used to extract details of the Extensions. The extracted fields are:

Date Entered;
By User;
Extra Statutory Days;
New Duration;
Org Estimate Completion;
Estimate Completion Date;
Narrative.

Extend Task Details – Non-maintainable fields

These fields (Extra Statutory Days, Original Estimated Completion, Duration, Estimated Completion Date) are display only and can not be maintained.

Extend Task Details – User Identifier
This field allows the selection of the user identifier.

Extend Task Details – User Identifier Description
This field displays the description of the user identifier.

Extend Task Details – Date Entered
This field allows for the entry of the date the extension was applied.

Extend Task Details – Narrative
This field allows the user to add comments.

Extend Task Details Selection - Date
This is the date the Extend Task was originally entered.

Extend Task Details Selection – User Identifier
This is the User Identifier that made the original entry.

Extend Task Details Selection – Extra Statutory Days
This is the Extra Time granted to the extension.

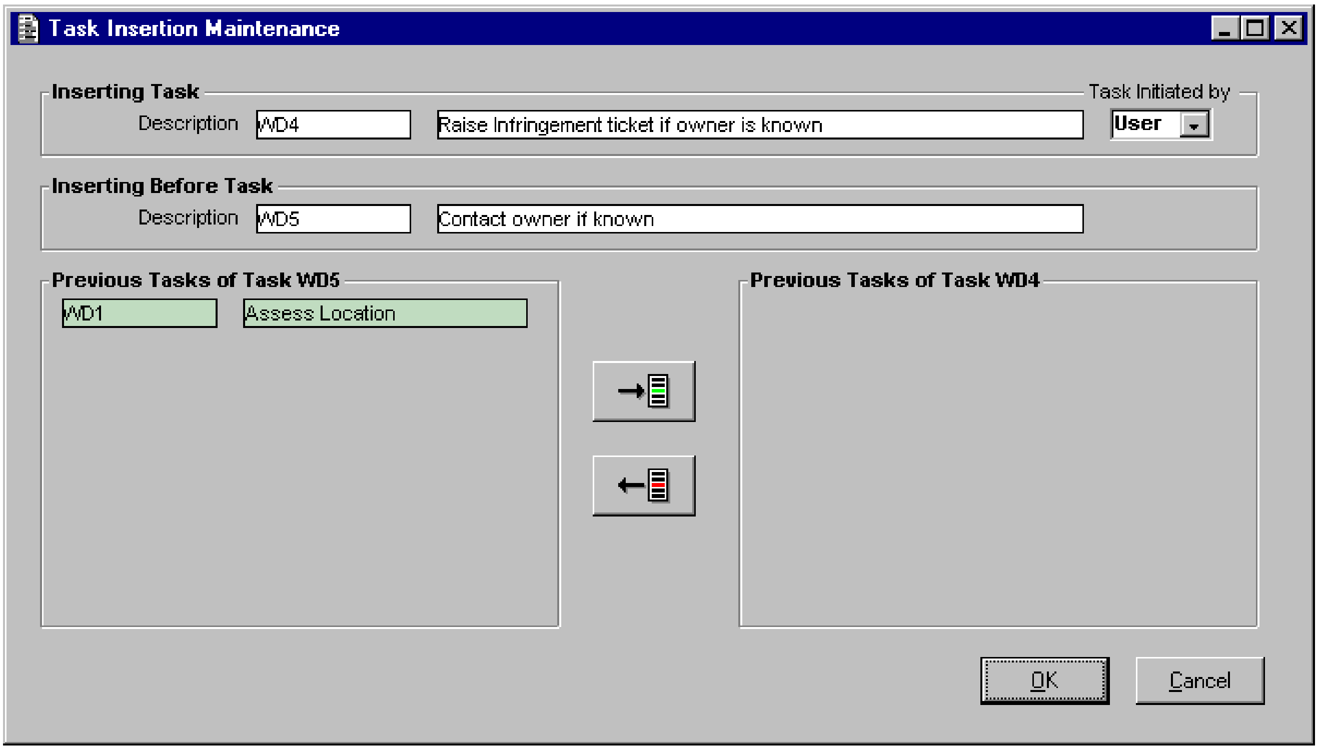
Extend Task Details Selection – Narrative
This field contains any narrative connected to the Extension of the Task. This is an optional field.

Task Insertion Maintenance Form

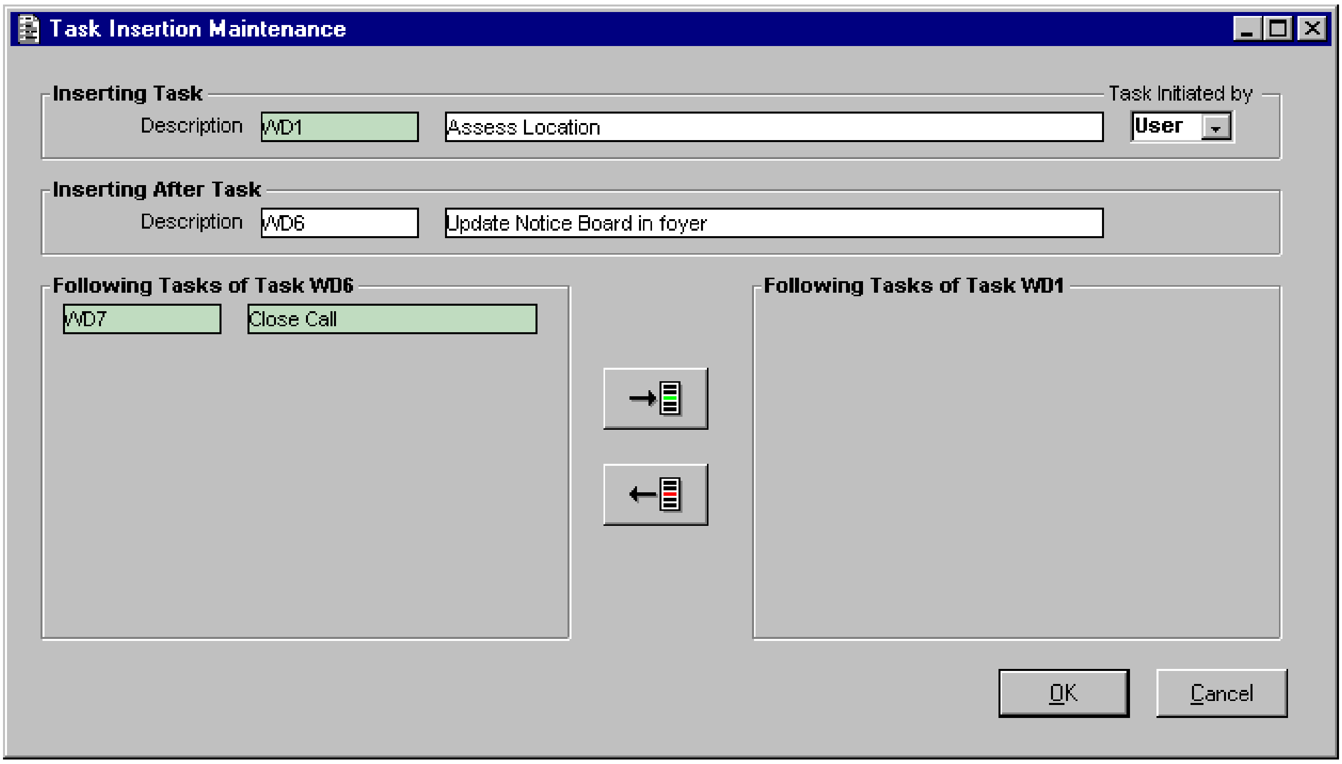
This form is presented when the Insert Task button is pressed from the Task Summary form.

The purpose of this form is to allow for the nomination of dependent tasks (either Previous or Next Tasks).

The form is presented in one of two different ways depending on whether you have selected to insert either “Before” or “After” the current task.



Task Insertion Maintenance Form (Previous)



Task Insertion Maintenance Form (Following)

Inserting Task

This field contains the code and description of the type of task you are inserting into the task list.

This field is display only and may not be maintained.

Task Initiated by

This field determines what mechanism will be used to Start the Task.

The default for the drop down is User.

Initiated by – Auto

When a task is nominated as an Initiated (Auto) task then the task will have the Actual Start Date/Time updated at the point of the Task creation during the loading of a Procedure.

If the Task has linked Previous Tasks then it is not started at Task creation, but rather at completion of the last Task linked as a Previous Task.

If the current User is the Responsible Officer then any Actions that have been designated as Start Actions will be initiated.

If the current User is not assigned as the Responsible Officer (and no Responsible Officer has been nominated on the Task) then the system will check to see if the current user is contained within the Group assigned to the Task. If the current user is a valid user for this Task then any Actions that have been designated as 'Start Actions' will be initiated.

If the current user is not authorised to the Task (or the Actions) then only the Actual Start Date/Time will be written. No Start Actions will be performed.

Initiated by – User

If a Task is flagged to be initiated by the User then the Task must be started manually (i.e. press the Start Task Button). The Task may be started at any time provided any linked previous tasks that exist have been completed.

Only a User that is authorised to the Task may Start the Task. Any Actions that have been designated as Start Actions will be initiated.

Inserting After Task / Inserting Before Task

This field contains the code and description of either:-

- The task you are inserting “After”
- The task you are inserting “Before”

Inserting After Task

The task you are inserting into the Task List will be placed after the task nominated in this field. This Task will become a dependent previous task to the new task.

Inserting Before Task

The task you are inserting into the Task List will be placed before the task nominated in this field. This Task will become a dependent next task to the new task.

Following Tasks of Task <task name> / Previous Tasks of Task <task name>

Previous Tasks of Task <task name>

This label for the columns will be displayed if you selected to insert your new task “Before” the selected task.

The left hand list will show all tasks that were dependent “Previous” tasks of the selected task. A decision needs to be made whether or not these tasks are still “Previous” to that task or whether you need to make them dependent “Previous” task(s) to the new task you are inserting.

If you wish to make a task a dependent “Previous” task of the new task you are inserting then press the select button and move it to the right hand side of the form.

The left hand list will be empty if the selected task did not have any dependent “Previous” tasks.

Following Tasks of Task <task name>

This label for the columns will be displayed if you selected to insert your new task “After” the selected task.

The left hand list will show all tasks that were dependent “Following” tasks of the selected task. A decision needs to be made whether or not these tasks are still “Following” that task or whether you need to make them dependent “Following” task(s) to the new task you are inserting.

If you wish to make a task a dependent “Following” task of the new task you are inserting then press the select button and move it to the right hand side of the form.

The list will be empty if the selected task did not have any dependent “Following” tasks.

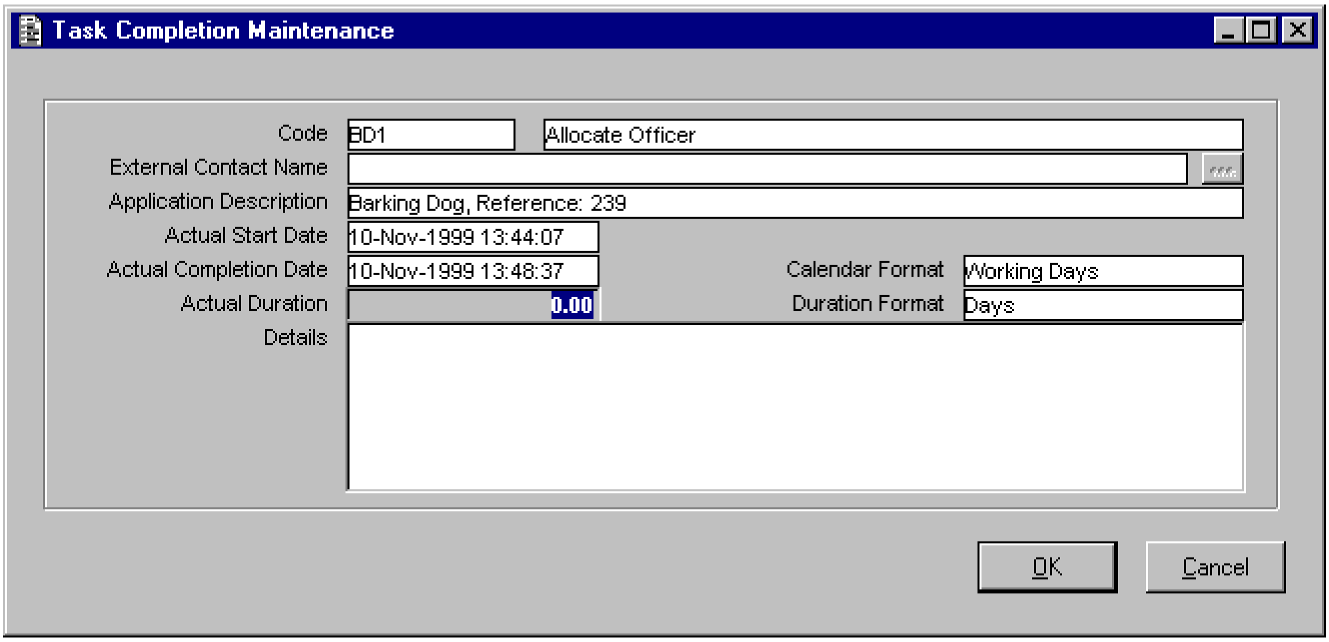
Task Completion Maintenance Form

This form ensures the user enters the Actual Time Taken when completing a Task from the Task Selection or Task Summary forms.

This form is only displayed if the Record Actual Time flag is checked ON and the Actual Time Taken on the task is zero.

The Task Completion Maintenance Form will force the officer to enter a value into the Actual Time Taken field.

If Cancel is selected on this form then the Completion of the Task will be stopped i.e. the Task will remain incomplete.



Task Completion Maintenance Form

Code

This field contains the Task Type and Description of the Task being completed.

This field is display only and may not be maintained.

External Contact Name

This field contains the name that is linked as the External Contact Name for the Task.

Pressing the detail button will display the Name Maintenance/Enquiry form.

This field is display only and may not be maintained.

Application Description

This field contains the details of the application record to which this task is linked.

This field is display only and may not be maintained.

Actual Start Date

This field contains the Actual Start Date and Time for the Task.

This field is display only and may not be maintained.

Actual Completion Date

This field contains the Actual Completion Date and Time for the Task. It is populated automatically on entry to this form.

This field is display only and may not be maintained.

Calendar Format

This field contains the calendar format upon which the task is based. I.e. Working Days or Calendar Days.

This field is display only and may not be maintained.

Actual Duration
This field contains the actual duration value for this Task. It is used in conjunction with the Duration Format.

When the ‘Record Actual Time’ flag is checked ON, the system will default the elapsed duration into this field. Users are able to change this value. A check will be performed on the Actual Duration field to ensure that the duration entered is not greater than the actual elapsed time.

If the ‘Record Actual Time’ flag is OFF, then when a Task is completed the Duration will be automatically calculated and defaulted into the Duration field on the Task Maintenance form. This form (Task Completion Maintenance) will therefore not display.

This field is mandatory. A check will be done to ensure there is a value entered in this field. If there is no value entered an error message will display and the user will be required to enter an Actual Duration.

Duration Format
This field displays the duration format for the Task.

Example
If Hours is the Duration Format then a value of 2.0 in the Actual Duration field would indicate 2 Hours.

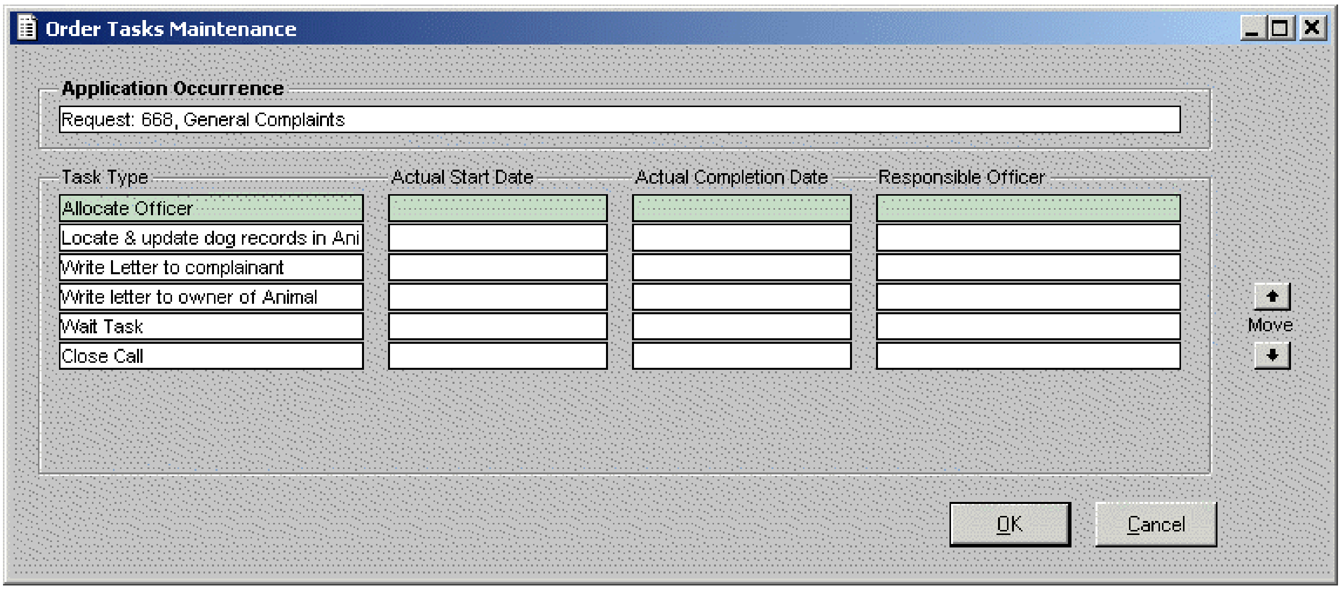
This field is display only and may not be maintained.

Details
This field contains free format text relating to the Task.

An unlimited number of characters is available.

Order Tasks Maintenance Form

This form displays when the ‘Order Tasks’ option button is selected from the Task Summary form. The Order Tasks Maintenance form lists all the Tasks currently attached, and provided the standard ‘Move Up/Down’ buttons to enable the Task sequence to be altered as necessary. This order facility is only applicable when the Workflow Application parameter has been set to “As Entered”.



Order Tasks Maintenance Form

Application Occurrence

This field displays the description of the record to which the Tasks are linked. This field is display only and may not be maintained.

Task Type

This field displays the description of the task to be performed. This description is user definable and is established in Task Type Parameter Maintenance.

This field is display only and may not be maintained.

Actual Start Date

This field contains the Actual Start Date and Time for the Task. This field is display only and may not be maintained.

Actual Completion Date

This field contains the Actual Completion Date and Time for the Task. This field is display only and may not be maintained.

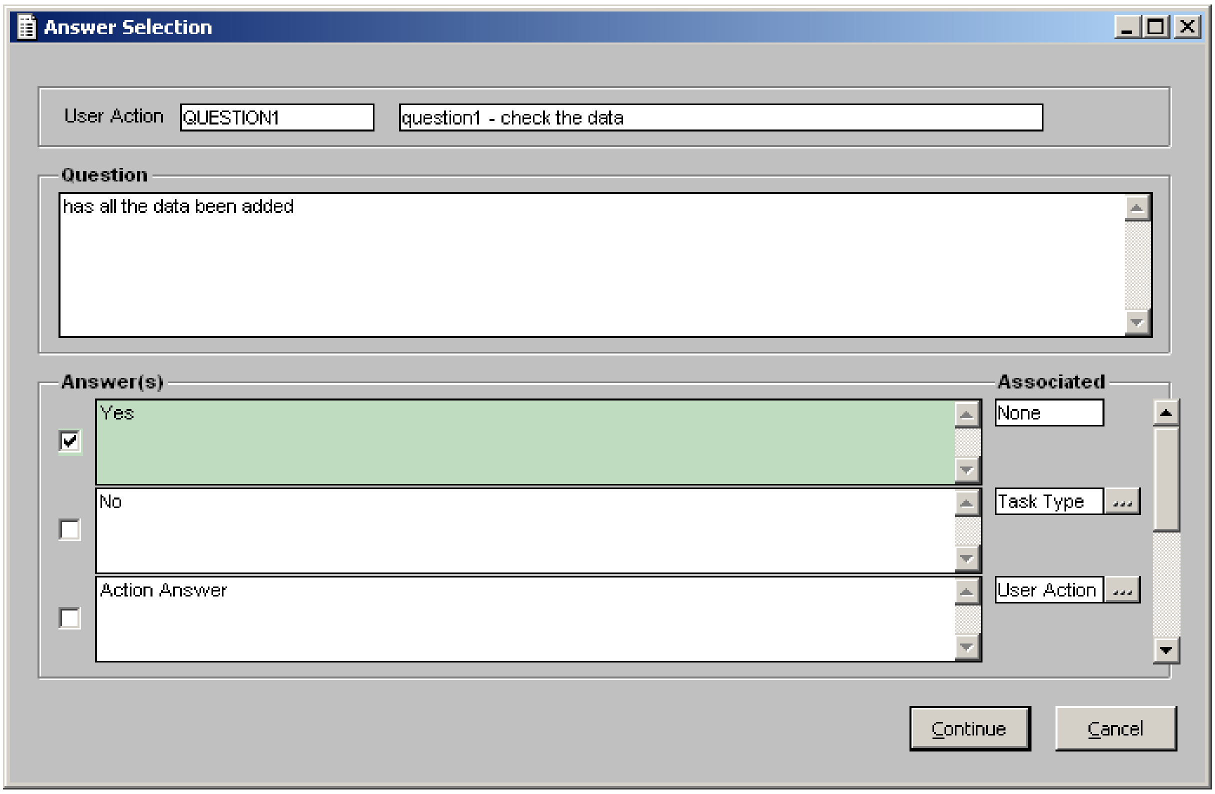
Responsible Officer

This field displays the officer's name that is responsible for the task (if an officer has been allocated). This field is display only and may not be maintained.

Answer Selection Form

The Answer Selection form displays when an Action that is a WFQUESTION has been started. It allows the User to nominate the required Answer for the Question. Depending on the Answer selected, any associated Tasks, User Actions or Procedures may be added.

To select the required Answer the User needs to click the box next to the correct Answer.



Answer Selection Form

User Action

The User Action that has this Question assigned to it is displayed in this field.

Question
The detail of the Question is displayed in this field.

Answer(s)
The Available Answers are shown on the form. To select the Answer the User needs to check on the checkbox next to the required Answer.

Associated
There are four options that can be displayed in this field. These are:-
- Procedure
- Task Type
- User Action
- None

If Procedure, Task Type or User Action are shown, then a detail button is available to display the assigned options for the Answer. Detailing out on the button will display the Answer Associated Selection form.

If a User Action is displayed, then the original User Action will be completed and the attached User Action(s) will be added and executed immediately against the current Task.

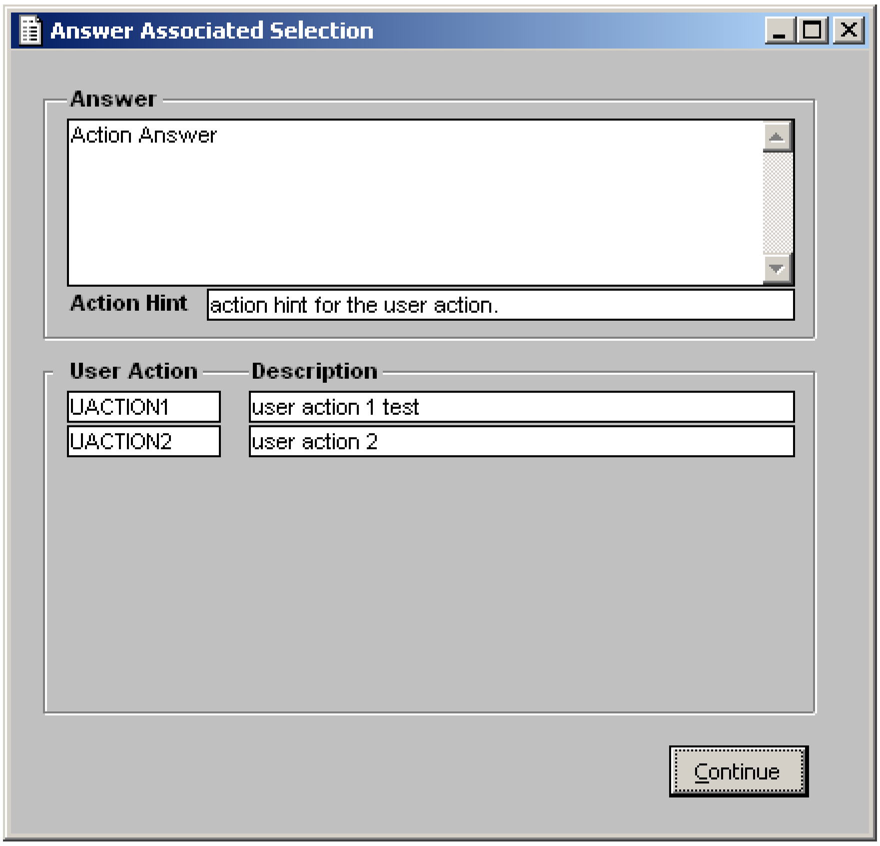
If a Task Type is displayed then the Task Type is added and the User Action will be completed. The Task Type(s) is added as a following Task to the Task being executed.

If a Procedure is displayed then the Task Types associated to the Procedures(s) will be inserted and the User Action will be completed. The Task Types is inserted as following Tasks to the Task being executed.

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

Answer Associated Selection Form

The Answer Associated Selection form displays when the Detail Button for the Associated field for an Answer has been selected on the Answer Selection form.. This form displays the User Actions, Tasks or Procedures that will be activated if the Answer is selected.



Answer Associated Selection Form

Answer
The Answer that the User Action(s) are to be associated to is displayed in this field.

Action Hint
Where an Action Hint has been entered on the Answer then it is displayed in this field.

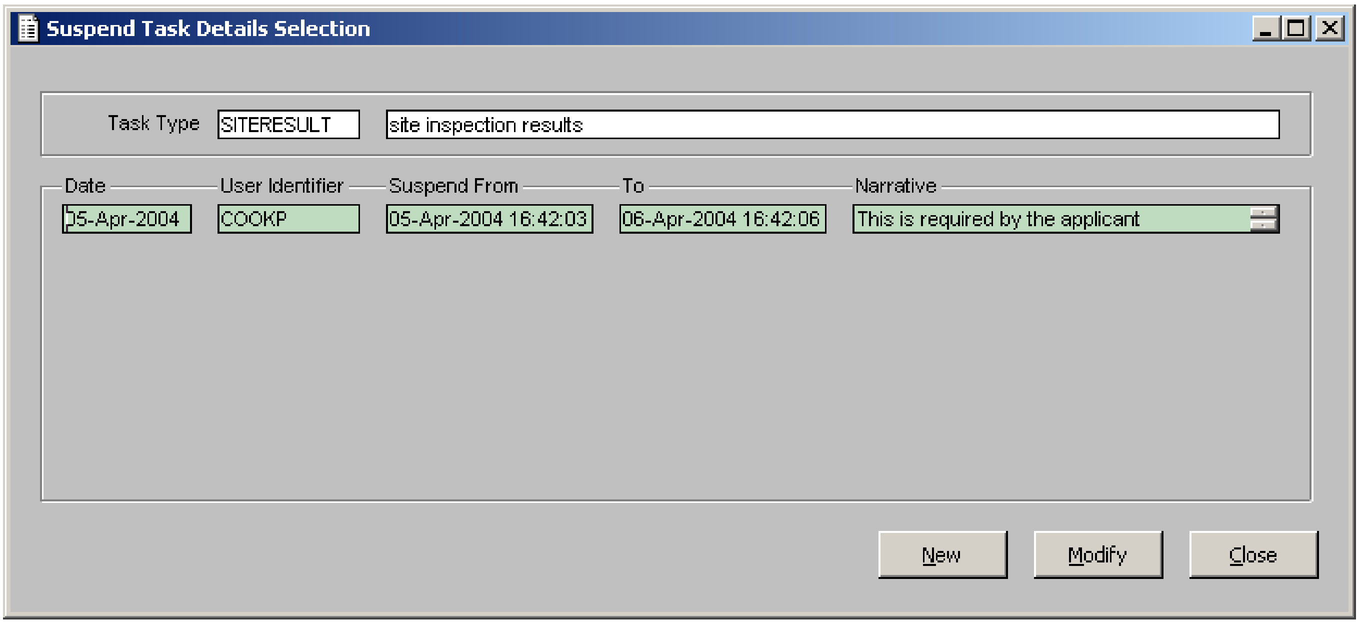
User Actions / Task Types / Procedures and their Descriptions

The User Actions, Task Types or Procedures that have been assigned to the Answer are shown in this area.

Suspend Task Details Selection Form

This form displays when the ‘Suspend’ option button is selected from the Task Summary form. The Suspend Task Details Selection form lists any Suspend Records for the current Task and provided the option of adding a New Suspend record or updating an exiting Suspend record.
If there are no Suspend records for the highlighted Task then this form is not displayed and the User is taken to the Suspend Task Details form where a Suspend record can be added.

When a Task is suspended it is possible to update the Status of a Licence according to the Status set up in parameters. It then reverts back to its previous Status when the Suspension is complete. (Licensing >> Licensing Parameters >> Class Selection >> Workflow >> Workflow Application Maintenance >> Task Details >> Status).



Suspend Tasks Detail Selection Form

Task Type
This field displays the type code and description of the task that has Suspend records.

This field is display only and may not be maintained.

Date
The Date field shows the Date that the Suspend record was added to the Task. It does not represent the Start Date of the Suspend Period.

User Identifier
The User Identifier is the person who has added the Suspend record to the Task.

Suspend From
The Suspended From field shows the Date / Time that the Suspension commences for the Suspend Record.

To
The To field shows the Date / Time that the Suspension will finish for the Suspend Record. This field can be blank which means that the Suspend Record has not been completed and is still in suspension.

Narrative
Information that has been entered for the Suspend record is displayed in this field.

Suspend Task Details Form

This form displays when the ‘Suspend’ option button is selected from the Task Summary form and no Suspend Records exist for the Task. or if the New or Modify Options has been selected from the Suspend Task Details Selection form.

When Users are working on a Task, they may need to suspend work on it and the time that the Task is suspended for is not to be taken into consideration. When the Task is resumed then the calculation times continue for the Task.

The Suspend Option is an Authority option and is only available to those Users who have been assigned the Option within the Workflow Parameters.

A new Suspend record can not be added when a Task is not Active (i.e. has not been started or already completed) or there is an existing Suspend record which has no ‘To’ date. In these circumstances, the New Button is not available.

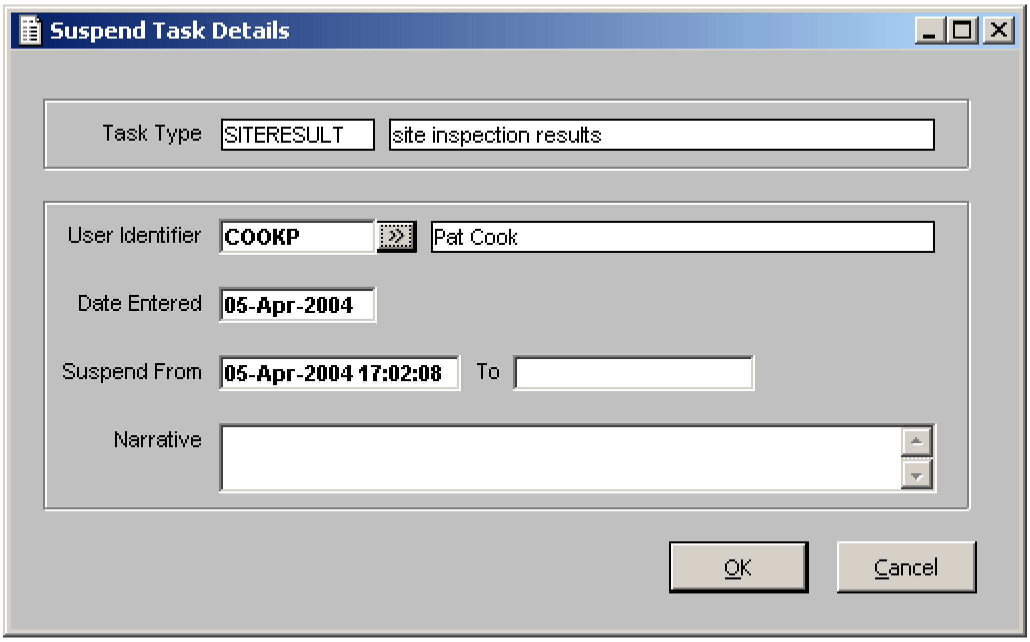
Validation is performed to ensure that the 'Suspend From' and 'To' Dates entered are in the range of the Task Starting date and Task Completion Date. These dates cannot be overlapped with other Suspend Records in this Task.

If the suspended Task is linked to additional Tasks then these additional Tasks will have their Estimated Due Date recalculated to take into account the suspended Task recorded against the Suspended Task when the To Date has been entered.

New functionality has been added to the Suspend Task option. When a task is suspended the status of the Application is change to reflect the status selected on the Work Flow Application Maintenance Form parameters. When the task suspend date has expired or the suspension is removed the status is returned to what it was prior to the suspend action.

If the suspend status on the Work Flow Application Maintenance Form has no entries and a task in suspended, the Application Status remains as is. When the status is removed or ends the status does not change.

NOTE: If a Task is suspended then only Users who have authority to the 'Suspend Task' option can perform the 'Continue Task' and 'Complete Task' on the Task currently suspended.



Suspend Task Details Form

Task Type

This field displays the type code and description of the task that has Suspend records.

This field is display only and may not be maintained.

User Identifier

The User Identifier field is mandatory and defaults to the current User. This can be changed to specify the User responsible for the Suspend Record. This is limited to authorised Users within the Structure set up at the Workflow System Parameters.

Date Entered

The Date Entered field defaults Today's Date and can be changed to indicate the Date the record is or was entered. This is a mandatory field.

Suspend From

The Suspended From field indicates the 'From' date and time the Task is suspended from. This is a mandatory field. The Calendar function is available in this field.

Validation is performed on the Suspend ‘From’ and ‘To’ dates entered in the suspension record to ensure they are in the range of the Task starting and Task completion dates. The ‘From’ and ‘To’ dates cannot be overlapped with other suspension records for this Task.

To
The ‘To’ field indicates the ‘To’ date and time the Task is suspended to. If the ‘To’ field is left blank then the Task is regarded as being suspended up to Today. The Calendar function is available in this field.

Validation is performed on the Suspend ‘From’ and ‘To’ dates entered in the suspension record to ensure they are in the range of the Task starting and Task completion dates. The ‘From’ and ‘To’ dates cannot be overlapped with other suspension records for this Task.

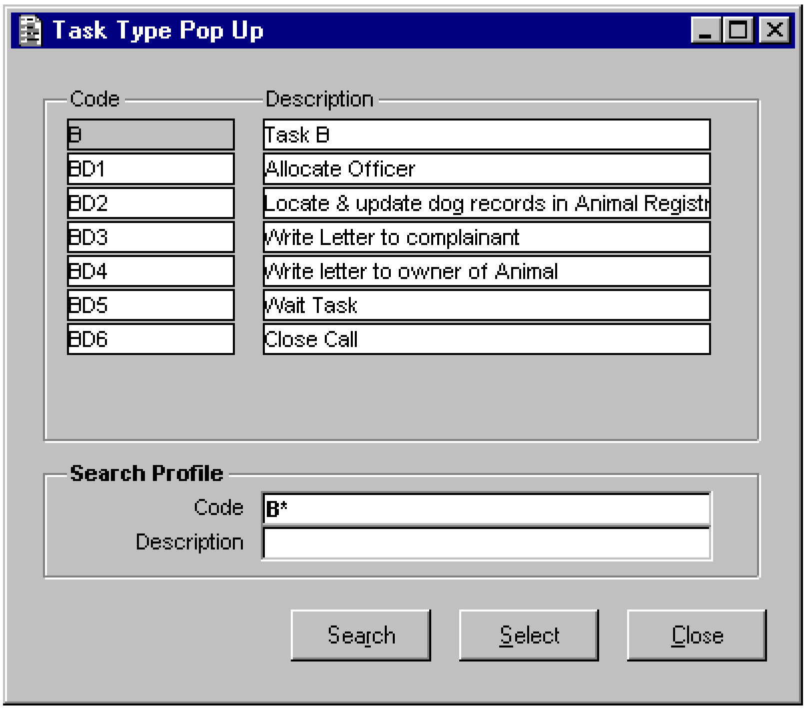
If the suspended Task is linked to additional Tasks then these additional Tasks will have their Estimated Due Date recalculated to take into account the suspended Task recorded against the Suspended Task when the To Date has been entered.

Narrative
The Narrative field is an optional field and is used to record a comment on why the Task has been suspended.

Task Type Pop Up Form

This form is a standard pop up form. It displays all Task Types established at the parameter level.

A standard Search Profile is provided on this form. Full wild card searching is available.



Task Type Pop Up Form

Code
This field contains the unique code that has been assigned to the Task Type.

This field is display only and may not be maintained.

Description
This field contains the full description of the Task Type.

This field is display only and may not be maintained.

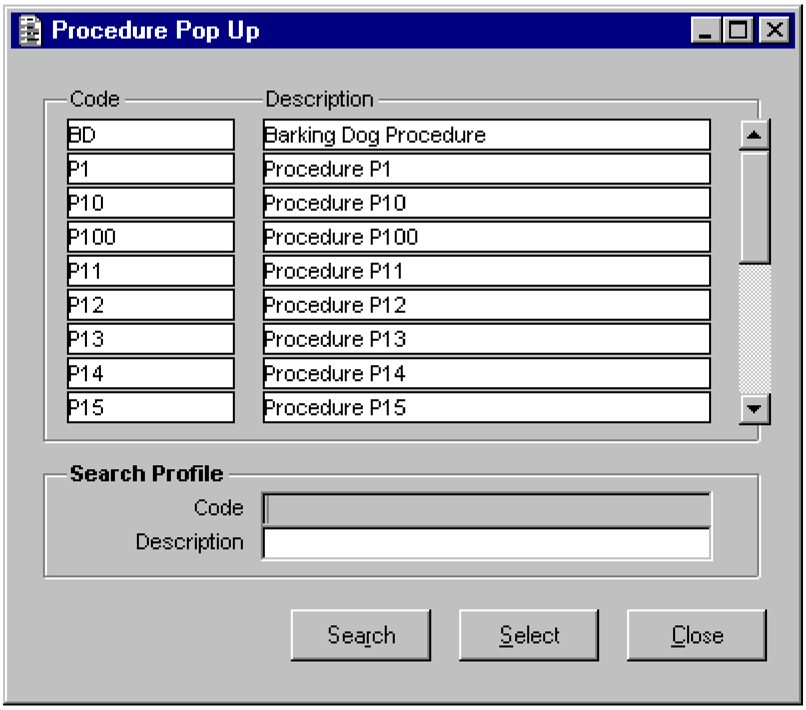
Search Profile – Code
Enter a Task Type code (or part thereof) to restrict your search. E.g. Enter *BS* to find all Building Services related Tasks. (This of course depends on your coding structure)

Search Profile – Description
Enter a Task description (or part thereof) to restrict your search. E.g. Enter *Contact* to find all tasks where the word ‘Contact’ appears anywhere in the description.

Procedure Pop Up Form

This form is a standard pop up form. It displays all Procedures established at the parameter level.

A standard Search Profile is provided on this form. Full wild card searching is available.



Procedure Pop Up Form

Code
This field contains the unique code that has been assigned to the Procedure.

This field is display only and may not be maintained.

Description
This field contains the full description of the Procedure.

This field is display only and may not be maintained.

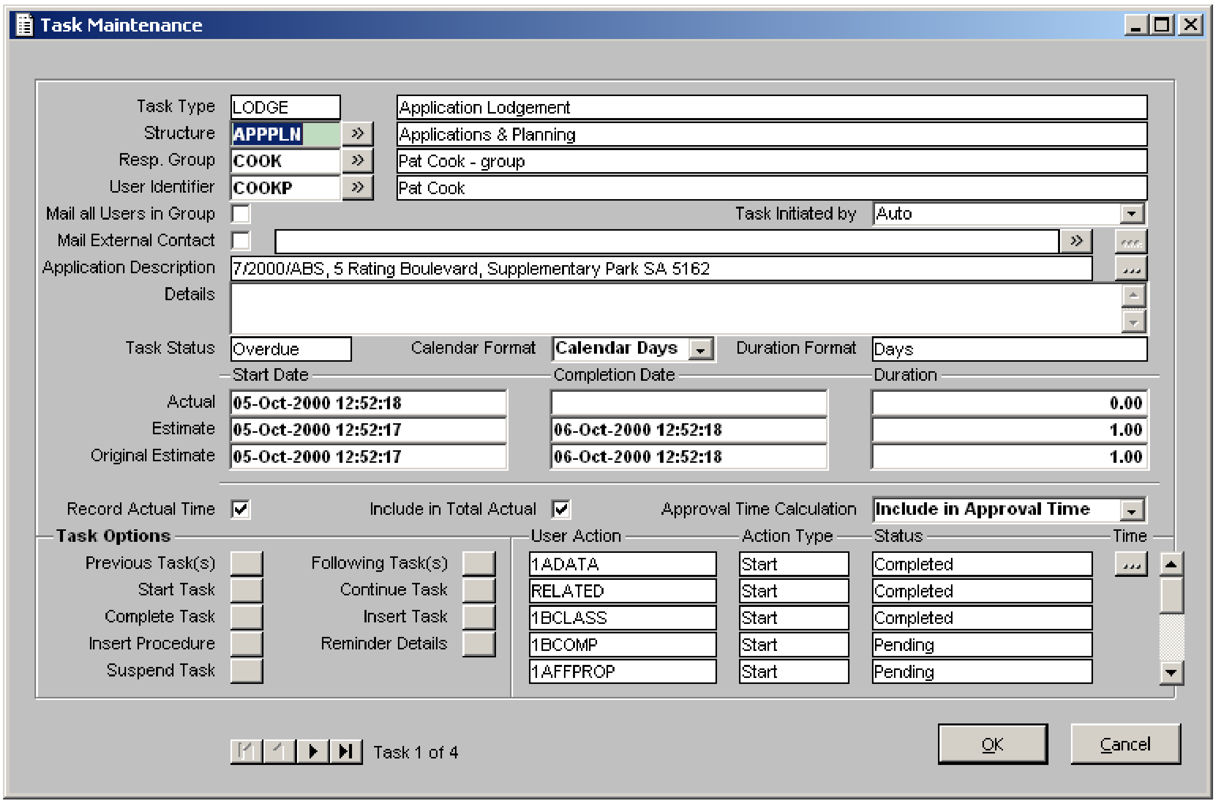
Search Profile – Code
Enter a procedure code (or part thereof) to restrict your search. E.g. Enter *DOG* to find all DOG related procedures. (This of course depends on your coding structure)

Search Profile – Description
Enter a procedure description (or part thereof) to restrict your search. E.g. Enter *Wander* to find all procedures where the word ‘Wander’ appears anywhere in the description.

Task Maintenance Form

This form is presented if Modify (or double clicking) is chosen from the Task Summary form or from the Task Selection form or the Workflow/Task In Tray Menu had been used.

This form allows detailed maintenance of a specific task.



Task Maintenance Form

Task Type

This field contains the task type code and task description of the task currently being maintained. These codes and descriptions are established at the parameter level and are user definable.

This field is display only and may not be maintained.

Structure

This field contains the responsibility structure for the current task. It is loaded automatically from the Task Type Parameter however may be overridden at the individual task level.

You may not maintain this field if permission has not been granted at the system level.

Any previously defined structure in Pathway may be selected as the Responsible Structure for the current task. Enter a valid Structure Code into the field or alternatively press the Pop Up Button associated with the field.

Once a Task has been Started this field is display only.

This field is mandatory.

Responsibility Group

This field contains the responsibility group for the current task. It is loaded automatically from the Task Type Parameter however may be overridden at the individual task level.

You may not maintain this field if permission has not been granted at the system level.

Any Group within the nominated Responsibility Structure (see previous field) may be selected.

Enter a valid Group Code into the field or alternatively press the Pop Up Button associated with the field.

Once a Task has been Started this field is display only.

This field is mandatory.

Responsible Officer

This field contains the responsible officer for the current task. It is loaded automatically from the Task Type Parameter (if set) however may be overridden at the individual task level.

You may maintain this field only if permission has been granted at the system level.

Only an officer within the nominated Responsibility Group (see previous field) may be selected.

If no responsible officer is assigned to the task then any officer within the nominated Group will be able to maintain the task.

This field will be populated automatically with the officer id that actually started the Task.

Once a Task has been Started this field is display only.

Mail all Users in Group

If this flag is turned on then whenever the task is started (automatically by a previous task) **all** users within the responsibility group assigned to this task will receive an e-mail message advising that this task has been started and for which record it belongs.

Task Initiated by

This field determines what mechanism will be used to start the Task.

The default for the drop down is User.

You will not be able to maintain this field if the “Maintain Task Properties” Authority has not been assigned to you.

Initiated by – Auto

When a task is nominated as an Initiated (Auto) task then the task will have the Actual Start Date/Time updated at the point of the Task creation during the loading of a Procedure.

If the Task has linked Previous Tasks then it is not started at Task creation, but rather at completion of the last Task linked as a Previous Task.

If the current User is the Responsible Officer then any Actions that have been designated as Start Actions will be initiated.

If the current User is not assigned as the Responsible Officer (and no Responsible Officer has been nominated on the Task) then the system will check to see if the current user is contained within the Group assigned to the Task. If the current user is authorised to the Task then any Actions that have been designated as ‘Start Actions’ will be initiated.

If the current user is not authorised to the Task (or the Actions) then only the Actual Start Date/Time will be written. No Start Actions will be performed.

Initiated by – User

If a Task is flagged to be initiated by the User then the Task must be started manually (i.e. press the Start Task Button). The Task may be started at any time provided any linked previous tasks that exist have been completed.

Only a User that is authorised to the Task may start the Task. Any Actions that have been designated as Start Actions will be initiated.

Mail External Contact Flag

External Contact Name

This field contains the external contact name (if relevant) for the current task. This field is used where an external contractor is responsible for performing the Task. For example Weed Spraying roadside verges.

If a name has been specified for the Task at the Task Type Parameter level then the name will automatically be loaded.

Pressing the Pop Up Button will present the Name Search Profile form from which you may either enter search criteria for a name record or create a new name record (security permitting).

Pressing the detail button will present the Name Enquiry Form.

This function is not currently available

Application Description

This field displays information about the record to which this task is linked e.g. customer request number and type.

Pressing the detail button will present the appropriate maintenance form for the record. E.g. Request Maintenance

Details

This field contains an unlimited amount of free format text in relation to the current task.

Task Status

This field displays the status of the Task. The options are:

- Complete – The task is completed, i.e. an Actual Completion Date has been recorded.
- Current – The Task is ready to be started.
- Overdue – The Task is not completed and has an Estimated Completion Date that is less than the current date, or date selected.
- Pending – The Task has not been started.
- Suspend – The Task has been Suspended.

Calendar Format

This field determines whether or not non-working days (i.e. weekends, public holidays) are to be taken into consideration when determining estimated task dates.

If Working Days are selected then the calculation of estimated dates within work flow will not include any date within the Calendar System that has been flagged as non-working.

If Calendar Days is selected then the calculation of estimated dates within work flow will include all calendar days, even those flagged as non-working days.

You will not be able to maintain this field if the “Maintain Task Properties” Authority has not been assigned to you. If there is an Actual Completion Date on the Task, then this field is not able to be changed.

If you change the Calendar Format, then the Estimated Completion Dates will be recalculated. If Working Days is nominated then the Start Dates will have the Duration amounts added to them and the resultant date will be the Completion Date. If this date falls on a non-working day, then the next available working day will be the Completion Date.

Duration Format
This field contains the format in which the Estimated duration has been given.

Valid values are:-

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

This field is used in conjunction with the Estimated Duration and Calendar format fields to provide estimated dates for the task. For more information refer to help on the Estimated Duration field.

You are not able to maintain this field in Task Maintenance.

Actual Start Date
This field displays the date and time that the current task was started. This field is updated automatically by the system whenever a task is started. If the task is not started then this field will be blank.

You may modify the actual start date and time if you have the appropriate permission at the system level (Maintain Actual Dates authority).

When the ‘Record Actual Time’ Flag is set OFF, the user is able to modify the Actual Start and/or Completion Dates and the Duration will be automatically recalculated based on the new Completion Date.

When the ‘Record Actual Time’ Flag is checked ON, if the Actual Start Date (or Actual Completion Date) is modified then a check will be performed on the recorded Actual Duration. If the Actual Duration recorded is greater than the elapsed time between the Actual Start Date and the Actual Completion Date then an error will be produced and the user will be required to amend the Actual Duration.

Changing the Actual Start Date, Actual Completion Date or Actual Duration **WILL** recalculate any associated date information. i.e. Following Tasks **WILL** have their Estimate Dates or Actual Dates recalculated.

Actual Completion Date
This field displays the date and time that the current task was completed.

This field is updated automatically by the system whenever a task is completed. If the task is not completed then this field will be blank.

You may modify the actual completion date and time if you have the appropriate permission at the system level (Maintain Actual Dates authority).

When the ‘Record Actual Time’ Flag is set OFF, the user is able to modify the Actual Start and/or Completion Dates and the Duration will be automatically recalculated based on the new Completion Date.

When the ‘Record Actual Time’ Flag is checked ON, if the Actual Start Date (or Actual Completion Date) is modified then a check will be performed on the recorded Actual Duration. If the Actual Duration recorded is greater than the elapsed time between the Actual Start Date and the Actual Completion Date then an error will be produced and the user will be required to amend the Actual Duration. The Actual Duration will not be updated by the system if the Actual Start or Completion Dates are modified. The user will need to update it as required.

Changing the Actual Start Date, Actual Completion Date or Actual Duration will not recalculate any associated date information. i.e. Following Tasks will not have their Estimate Dates or Actual Dates recalculated.

NOTE: Where the Task has Suspend records that the manual entry of the completion date will re-instate/resume the function and all suspension records which have a ‘To’ Date later than this Task Completion date will be reset to this Completion Date.

Additionally if Timesheet Fees are assigned to the Task, if the Task is completed manually by entering in a Completion Date, then the Fees will **NOT** be created.

Actual Duration
This field allows for the entry of the actual amount of time that the task took to complete.

The duration is recorded as per the Duration Format field.

Example
If the Duration Format field is set to Days then entering 1.5 will register as 1.5 days. (Fractions are allowed).

If the Record Actual Time flag is checked ON, the user will be required to manually enter an Actual Duration. If the ‘Record Actual Time’ flag is OFF, then the system will calculate the Actual Duration based on the Actual Start and Completion Dates.

When the ‘Record Actual Time’ Flag is set OFF, the user is able to modify the Actual Start and/or Completion Dates and the Duration will be automatically recalculated based on the new Completion Date.

When the ‘Record Actual Time’ Flag is checked ON, if the Actual Start Date (or Actual Completion Date) is modified then a check will be performed on the recorded Actual Duration. If the Actual Duration recorded is greater than the elapsed time between the Actual Start Date and the Actual Completion Date then an error will be produced and the user will be required to amend the Actual Duration. In this case the Actual Duration will not be updated by the system if the Actual Start or Completion Dates are modified. The user will need to update it as required.

If the Actual Duration is modified and the entered value is greater than the elapsed duration between the Actual Start Date and the Actual Completion Date then an error will be produced and the user will be required to amend the Actual Duration.

Changing the Actual Start Date, Actual Completion Date or Actual Duration will not recalculate any associated date information. i.e. Following Tasks will not have their Estimate Dates or Actual Dates recalculated.

Estimate Start Date
This field displays the current estimated start date and time for the task.

The value in this field may not necessarily be the same as the original estimated start date.
The value in this field is recalculated if additional tasks are added or tasks are deleted.

You may modify the estimate start date and time if you have the appropriate permission at the system level. (Maintain Estimate Dates authority)

Estimate Completion Date
This field displays the current estimated date and time on which the task should be completed.

The value in this field may not necessarily be the same as the original estimated completion date.
The value in this field is recalculated if additional tasks are added or tasks are deleted.

You may modify the estimate completion date and time if you have the appropriate permission at the system level, (Maintain Estimate Dates authority).

Please note: If you maintain the dates manually then no re-calculation of estimates for following tasks will occur. This can lead to confusing results.

Estimate Duration

This field displays the estimated time that is required to complete the task. The value in this field is established at the Task Type parameter level. The value displayed is used in conjunction with the Duration Format field.

Example
If duration is 1.00 and the Duration Format field is set to hours then the estimated duration would be 1 hour. The Estimate Duration field will be rounded up or down to the nearest whole number if a fraction (e.g. 1.54) is entered.

You may modify the estimate duration if you have the appropriate permission at the system level. (Maintain Estimate Dates authority)

Original Estimate Start Date
This field displays the original estimated start date and time for the task.

The value in this field is calculated when tasks are initially assigned to the record. The value, once calculated, is never changed.

You may modify the original estimate start date if you have the appropriate permission at the system level. (Maintain Estimate Dates authority).

If the Original Estimate Start Date is modified then the Original Estimate Completion Date will be recalculated based on the Original Estimate Duration.

Any process which recalculates the Original Estimate Dates for a Task will impact any Tasks which are related to the current task. i.e. The Original Estimate Dates for any following Tasks will also be recalculated.

Original Estimate Completion Date
This field displays the original estimated completion date and time for the task.

The value in this field is calculated when tasks are initially assigned to the record. The value, once calculated, is never changed.

You may modify the original estimate completion date if you have the appropriate permission at the system level, (Maintain Estimate Dates authority).

If the Original Estimate Completion Date is modified then the Original Estimate Duration will be recalculated based on the elapsed time between the Original Estimate Start Date and the Original Estimate Completion Date.

Any process which recalculates the Original Estimate Dates for a Task will impact any Tasks which are related to the current task. i.e. The Original Estimate Dates for any following Tasks will also be recalculated.

Original Estimate Duration
This field displays the estimated time that is required to complete the task. The value in this field is established at the Task Type parameter level. The value displayed is used in conjunction with the Duration Format field.

Example
If duration is 1.00 and the Duration Format field is set to hours then the estimated duration would be 1 hour. The Original Estimate Duration field will be rounded up or down to the nearest whole number if a fraction (e.g. 1.54) is entered.

You may modify the original estimate duration if you have the appropriate permission at the system level. (Maintain Estimate Dates authority).

If the Original Estimate Duration is modified, then the Original Estimate Completion Date will be recalculated based on the Original Estimate Start Date and the Original Estimate Duration.

Any process which recalculates the Original Estimate Dates for a Task will impact any Tasks which are related to the current task. i.e. The Original Estimate Dates for any following Tasks will also be recalculated.

Record Actual Time
If this flag is turned on, when the task is completed the system will force the entry of the actual time taken to perform the task.

This flag is set automatically via the Task Type Parameter.

The Actual Duration field is mandatory if the Record Actual Time flag is checked on. The user will be required to manually enter an Actual Duration. If the 'Record Actual Time' flag is off, then the system will calculate the Actual Duration based on the Actual Start and Completion Dates.

You will not be able to maintain this field if the "Maintain Task Properties" Authority has not been assigned to you.

Include in Total Actual
If this flag is checked on then the Actual Time Spent on the task will be included on the Actual Times Report.

If this flag is not checked on, then any Actual Time Spent will not be included on the Actual Times Report.

This flag cannot be set on if the Record Actual Time flag is off.

You will not be able to maintain this field if the "Maintain Task Properties" Authority has not been assigned to you.

Approval Time Calculation
There are 3 options available for the User to select. These are:-

- Include in Approval Time
- Exclude from Approval Time
- Deduct from Approval Time

This field is only used by the Application and Licensing Approval Times Report process. It is not used in any other Modules.

When Approval Times are calculated the following processing occurs:

- If the Approval Time Calculation field is set to 'Exclude from Approval Time' that Task is ignored from that Application/Licence
- Tasks with 'Include In Approval Time' option selected will have their times calculated and added to the total Approval Time for that Application/Licence
- Tasks using the 'Deduct from Approval Time' option will also have their times calculated, but these times will be subtracted from the total Approval Time for that Application/Licence. Where there are concurrent Tasks flagged as Deduct from Approval Times and the tasks overlapped, Approval Times will be calculated concurrently and not individually for the tasks.

Task Options – Previous Task(s)
Pressing this button will display Tasks which are (or should be) previous task(s) to the current task.

Any tasks selected as previous tasks must be completed prior to the current task being started. (The current task, therefore, becomes a following task of the previous tasks)

Task Options – Following Task(s)
Pressing this button will present the Following Task Maintenance Form.

Task Options - Start Task Button
Pressing this button will start the task.

All Actions nominated as “Start” actions will be performed. The Actual Start Date of the task will be updated with the current system date and time.

The task will not be started if:

- dependent previous tasks have not been completed
- the task is already started
- you are not authorised to this task

Task Options - Continue Task Button
Pressing this button will continue the task completed or in the case of a Task that has been suspended will re-start / re-instate the suspended Task. Where the Suspend Record had no ‘Suspend To’ date it will be updated with Today’s date. Where there was a ‘Suspend To’ date it will be changed to today’s date.

The Continue button will perform any Start Actions that have not previously been completed. i.e. the Action Status is Pending.

If all Start Actions have previously been completed then the Continue Task Button will Complete the Task.

The task will not be continued if:

- the task has not been started
- you are not authorised to this task

NOTE: - If the Task was Suspended at the time it is Continued, then the ‘To’ Date on the Suspend Record will be updated to today’s date. If there are Timesheet Entries for Billable time on the Task then the Fees will be generated and added to the balance of the Application / Licence.

Task Options - Complete Task Button
Pressing this button will complete the task.

All Actions nominated as “End” actions will be performed. Any dependent next tasks will be automatically started. The Actual Completion Date of the task will be updated with the current system date and time.

The Task will not be completed if:

- the task has not been started
- there are any outstanding “Start” actions (in which case you should choose Continue Task)
- there is no Actual Duration entered and the ‘Record Actual Time’ flag is ON.
- You are not authorised to this task

NOTE: - If the Task was Suspended at the time it is Completed, then the ‘To’ Date on the Suspend Record will be updated to today’s date. If there are Timesheet Entries for Billable time on the Task then the Fees will be generated and added to the balance of the Application / Licence.

Task Options - Insert Task Button
Pressing this button will allow you to insert an additional task onto the task list.

The task you wish to insert must be selected from the Task Type Pop Up form.

Pressing the Previous Task(s) or Following Task(s) buttons will allow you to establish task dependencies as required.

When inserting a Task the Estimated Start and Completion Dates of remaining tasks will be recalculated.

You may not insert a new Task before a Started Task.

The Task you wish to insert must be selected from the Task Type Pop Up form.

If you are inserting a Task where the currently selected task has not been started or completed then the following message will be displayed:

How would you like to link to the selected task. Before, After, Neither, Cancel

Selecting Before

The Task Insertion Maintenance form will be presented with the previous tasks of the current task displayed. You may, if required, select that task to now be the previous task of the new task you are inserting. The way the new task is to be initiated is also available on this form. The default is User.

The Estimated Start Date/Time of the new Task is taken from the Estimated Completion Date/Time of the previous task.

Selecting After

The Task Insertion Maintenance form will be presented with the following task(s) of the current task displayed. You may, if required, select that task(s) to now be the following task(s) of the new task you are inserting. The way the new task is to be initiated is also available on this form. The default is User.

The Estimated Start Date/Time of the new Task is taken from the Estimated Completion Date/Time of the current task.

Selecting Neither

The Task will be inserted into the list in Estimated Start Date/Time order. The Estimated Start Date/Time of the new task is copied from the Estimated Start Date/Time of the task that had ‘focus’ when Insert Task was pressed. This also means that the task must be started manually by the user (the default “Initiated By” value is User) and on completion of the Task no other task will be automatically started.

Selecting Cancel

Selecting Cancel will cancel the Insert Task function and you will be returned to Task Maintenance.

If you are inserting a Task where the currently selected task has already been started then the following message will be displayed:

Do you want to link after the selected task or to nothing? After, Nothing, Cancel

Selecting After

The Task Insertion Maintenance form will be presented with the following task(s) of the current task displayed. You may, if required, select that task(s) to now be the following task(s) of the new task you are inserting. The way the new task is to be initiated is also available on this form. The default is User.

The Estimated Start Date/Time of the new Task is taken from the Estimated Completion Date/Time of the current task.

Selecting Nothing

The Task will be inserted into the list in Estimated Start Date/Time order. The Estimated Start Date/Time of the new task is copied from the Estimated Start Date/Time of the task that had ‘focus’ when Insert Task was pressed. This also means that the task must be started manually by the user (the default “Initiated By” value is User) and on completion of the Task no other task will be automatically started.

Selecting Cancel

Selecting Cancel will cancel the Insert Task function and you will be returned to the Task Summary.

When inserting a Task the Estimated Start and Completion Dates of remaining tasks will be recalculated.

A Task may not be Inserted if permission has not been granted at the system level.

Task Options - Insert Procedure Button
Pressing this button will allow you to insert a group of tasks (via a Procedure) onto the task list.

The Procedure you wish to insert must be selected from the Procedure Pop Up form.

A Procedure may not be Inserted if permission has not been granted at the system level.

Task Options - Reminder Details Button
The *Reminder Details* button will display if the *Task Reminders* authorised function has been activated. Selecting the *Reminder Details* button displays an enquiry form showing the last reminder date/time and total number of reminders for the Task. The checkpoints and reminder email recipients defined against the relevant Task Type are also shown. If there are no reminder details for a Task, a message to that effect is displayed.

Task Options – Suspend Task
The Suspend Task is an 'Authority' option and is only assigned to the required Users. Selecting this Option displays the Suspend Task Details Selection form showing any existing suspend records for the Task. Existing Suspend records can be modified or new suspend records added. The Suspend Task option can only be selected when the Task has been started.

User Action
This field display's all user actions that have been, or will be, performed when this task is started, continued or completed.

This field is display only and may not be maintained.

Action Type
This field displays whether the Action will be executed at the Start of the Task or at the End (Completion) of the Task.

This field is display only and may not be maintained.

Action Status
This field displays the current status of the User Action.

Pending – The User Action has not yet been performed.
Completed – The User Action has been performed and completed successfully.

Time
If the Action has been defined as being a Timesheet Action and Timesheet entry is required for the Action then the Time Option Button is displayed. This takes the User to the Timesheet entries to allow modification or entry of new Timesheets.

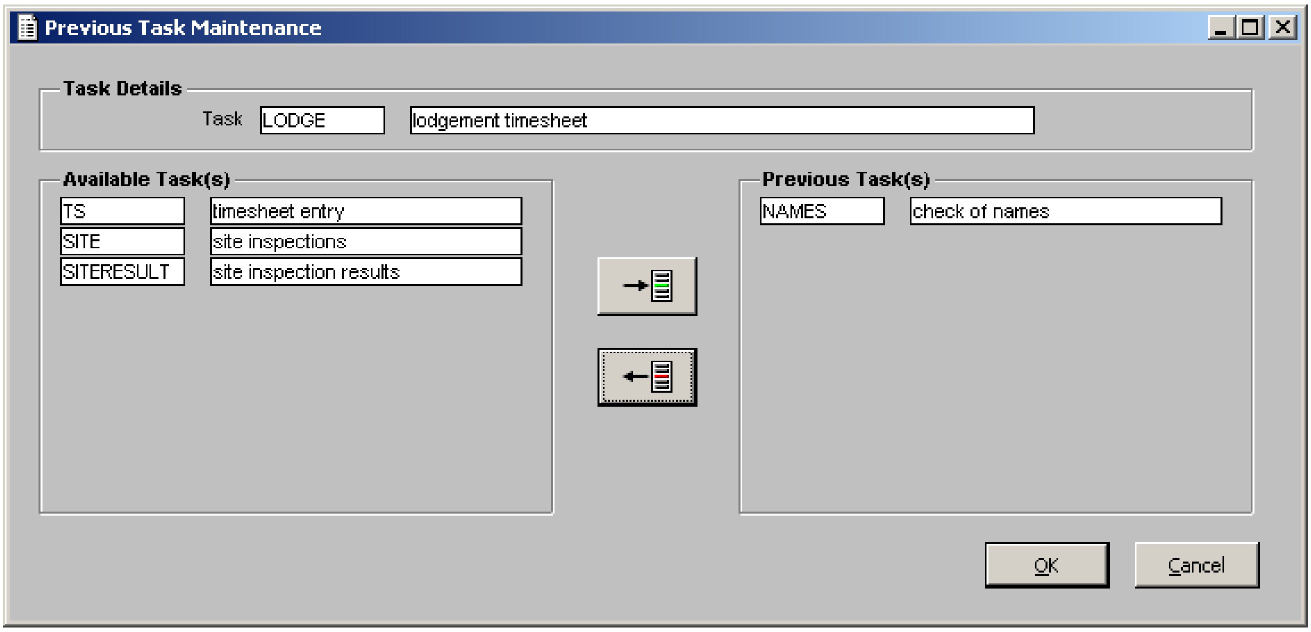
NOTE: Once the Task is completed then the User can only view the Timesheet entries from this option, they are in display mode only.

Previous Task Maintenance Form

This form allows you to modify those tasks which are (or should be) previous task(s) to the current task. Pressing the Previous Task(s) Button on the Task Maintenance form accesses this form.

Any tasks selected as previous tasks must be completed prior to the current task being started. (The current task, therefore, becomes a following task of the previous tasks)

This form is accessed via the Task Maintenance form and pressing the Previous Task(s) Button.



Previous Task Maintenance Form

Task

This field displays the code and description of the task currently being maintained.

All changes made on the form are pertinent to this task. Any tasks selected as being previous tasks must be completed before this task may be started.

This field is display only and may not be maintained.

Available Task(s)

This column displays all tasks that are available to be selected as Previous Tasks to the current task.

To nominate a task as a Previous Task click on the task description and press the Select Button.

Previous Task(s)

This column displays all tasks that have been selected to be Previous Tasks to the current task.

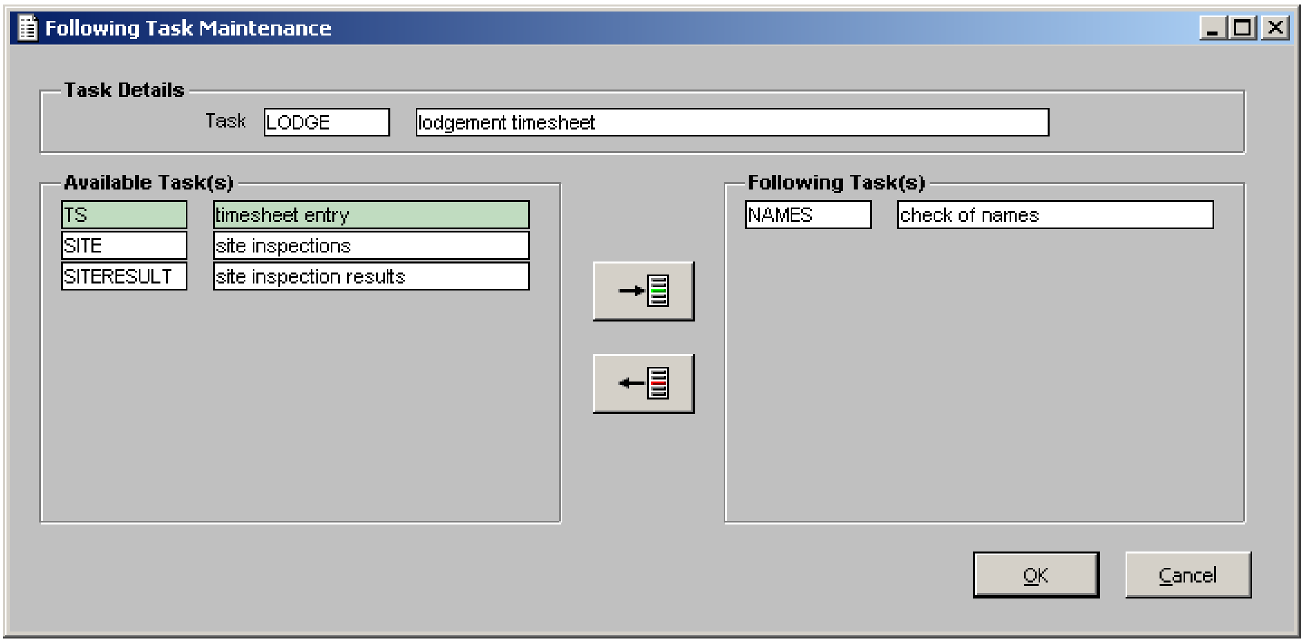
To remove a task from the Previous Task column click on the task description and press the Remove Button.

Following Task Maintenance Form

This form allows you to modify those tasks which are (or should be) following task(s) to the current task. This form is accessed by pressing the Following Task(s) button on the Task Maintenance Form.

Any tasks selected as following tasks will be automatically started by the system when the current task is completed. (The current task, therefore, will become a Previous Task to the Following Tasks)

This form is accessed via the Task Maintenance form and pressing the Following Task(s) Button.



Following Task Maintenance Form

Task

This field displays the code and description of the task currently being maintained.

All changes made on the form are pertinent to this task. Any tasks selected as being following tasks will be automatically started on completion of this task.

This field is display only and may not be maintained.

Available Task(s)

This column displays all tasks that are available to be selected as Following Tasks to the current task.

To nominate a task as a Following Task click on the task description and press the Select Button.

Following Task(s)

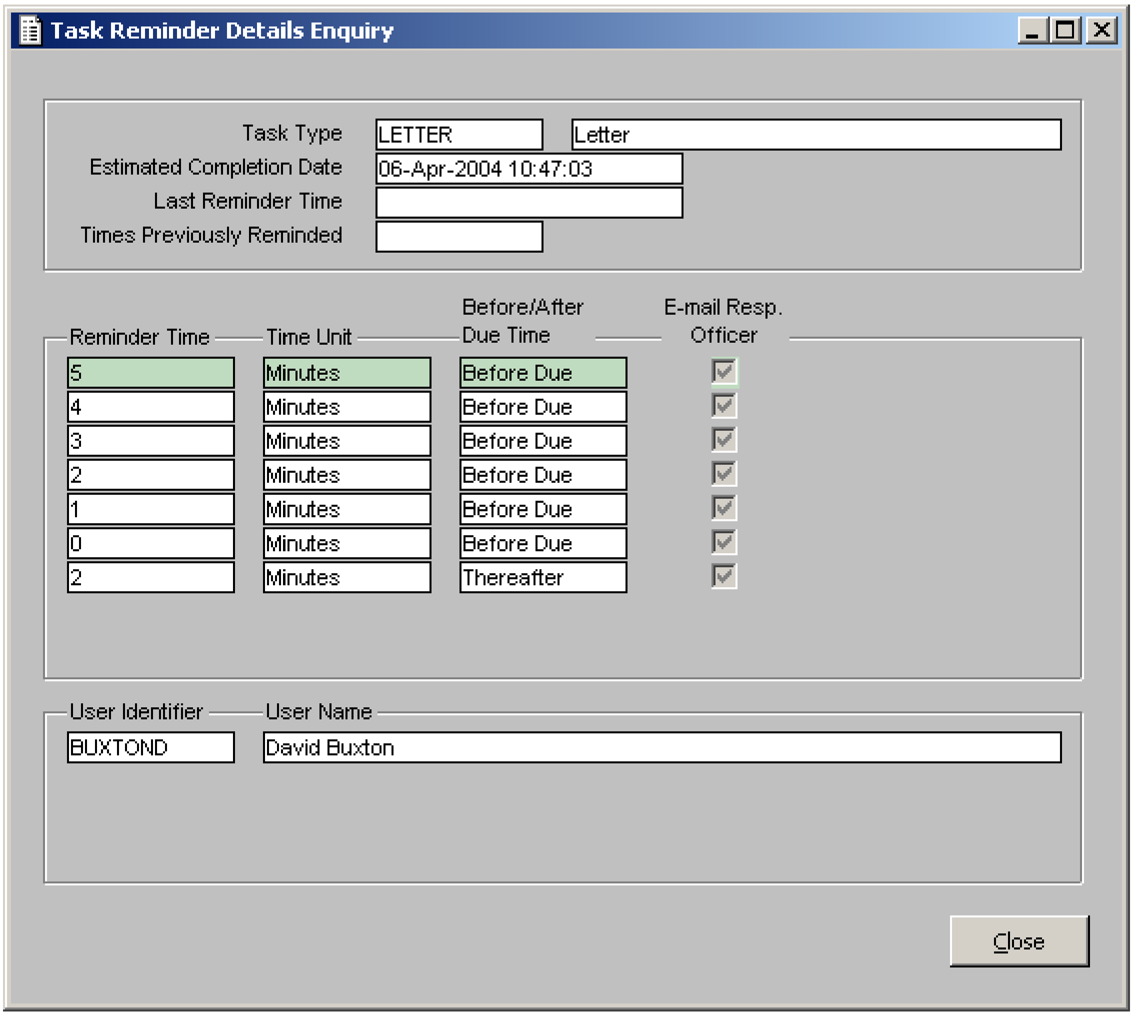
This column displays all tasks that have been selected to be Following Tasks to the current task.

To remove a task from the Following Task column click on the task description and press the Remove Button.

Task Reminder Details Enquiry Form

The Task Reminder Details Enquiry form displays the last reminder date/time and total number of reminders for the Task. The checkpoints and reminder email recipients defined against the relevant Task Type are also shown. If there are no reminder details for a Task, a message to that effect is displayed.

NOTE: If a Suspend Record exists for a Task that has Reminders defined, then the Reminder Job will be ignored whilst the Task is still suspended.



Task Reminder Details Enquiry form

Task Type

These fields display the Task Type and Description. These fields are display only.

Estimated Completion Date

This field displays the Estimated Completion Date of the Task.

Last Reminder Time

This field displays the Last Reminder Time (if one has already occurred). If no Reminders have been issued then this field will be blank.

Times Previously Reminded

This field displays the number of times an officer has been sent a Reminder for this Task. If none, then this field will be blank.

Reminder Time / Time Unit / Before/After Due Time / Email Responsible Officer

These fields display the Reminder details as set up in the Task Reminder parameters.

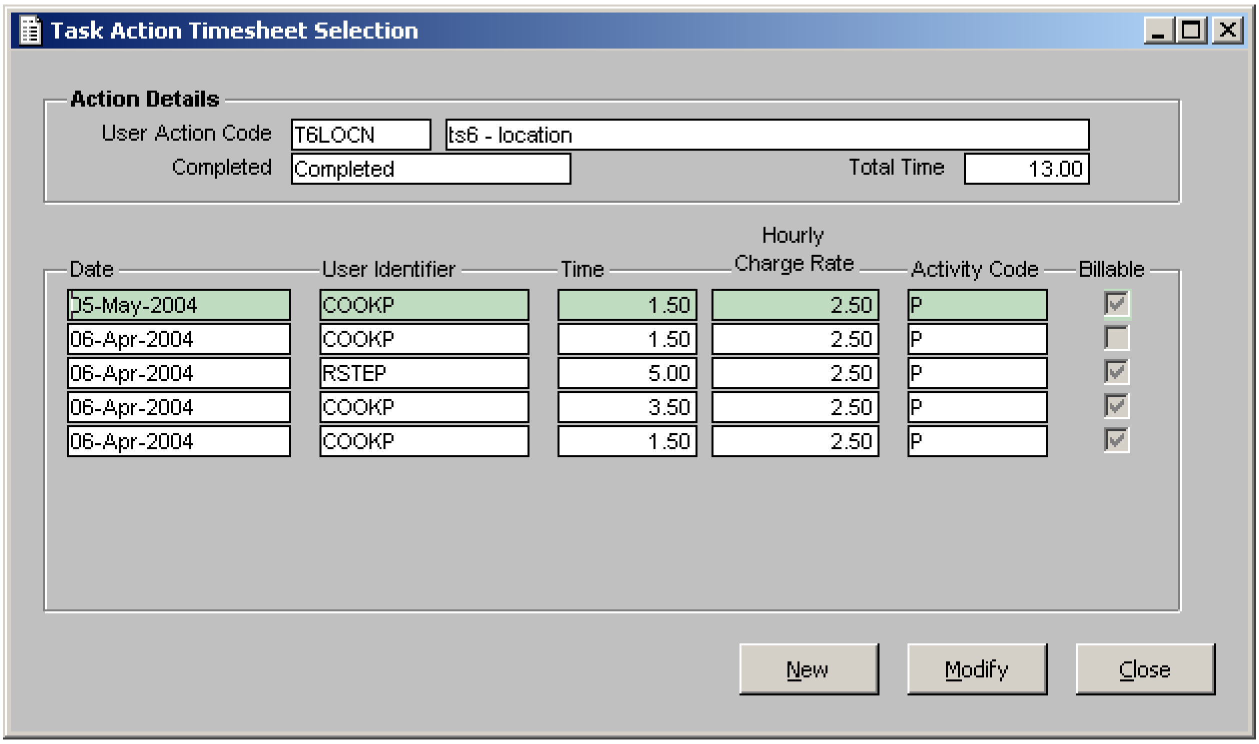
User Identifier / User Name

These fields display the details for the allocated Task Reminder Recipient.

Task Action Timesheet Selection Form

The Task Action Timesheet Selection form is displayed when the Detail Time Button is selected next to the User Task within the Task Maintenance Form. It shows all the Timesheet Entries that have bee put against the particular User Action.

NOTE: If the Task has been Completed then the New and Modify Buttons are replaced with Display and the Timesheet Entries are not able to be maintained.



Task Action Timesheet Selection Form

Action Details – User Action Code

These fields display the User Action Code and Description. These fields are display only.

Action Details - Completed

This field displays the Completed Status of the User Action.

Action Details – Total Time

The Total Time field shows the Total Time for the Timesheet entries displayed. This is the Time for all Timesheet Entries for the User Action Code currently selected. This includes Billable and Non-billable time.

Date

The Date field shows the Date for the Timesheet Entry.

User Identifier

The User Identifier shows the User that the Timesheet Entry has been entered for.

Time

The Time shown in this field represents the Time that has been entered on the individual Timesheet Entry. It is the values in this field that are added up to create the Total Time shown on the top of this form.

Hourly Charge Rate

The Hourly Charge Rate shown in this form is the actual Hourly Charge Rate that has been entered for the Timesheet. This value is then used to calculate out the Fee Amount if Fees are to be added to the Application/Licence.

Activity Code

The Activity Code shown in this field is the Activity that has been used when the Timesheet Entry has been entered into the system.

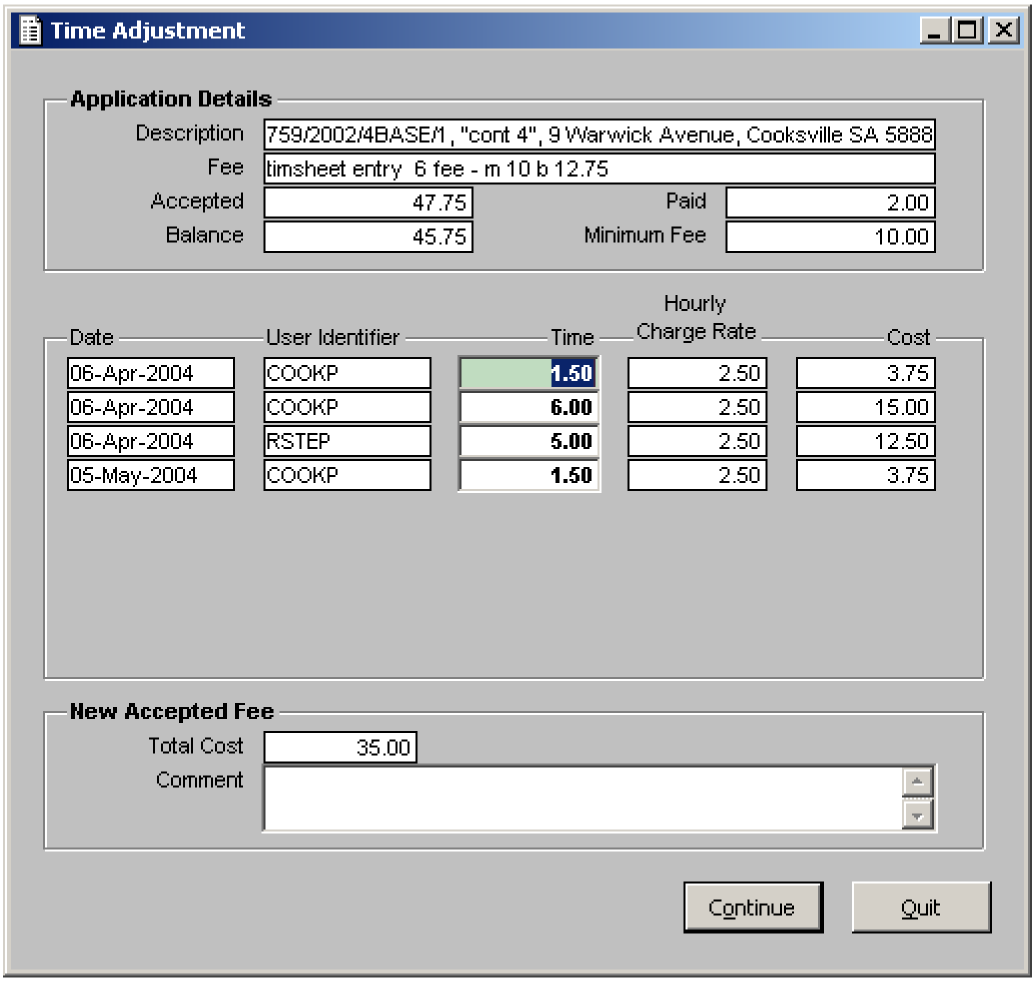
Billable

The Billable flag represents whether the Timesheet entry is billable or not. If flagged off then it will not be included in any Fee Calculations for an Application or Licence.

Time Adjustment Form

The Time Adjustment Form is displayed when the Adjustment Option Button has been selected from the Fees Maintenance Form (LAPG1170) within Application / Licensing Maintenance Menu. This form allows the changing of Timesheet Times for entries that have been processed and used to create the Fee Value that is currently being adjusted. As the Task associated to the Timesheet Entries has been completed it is not possible to adjust the time via the Timesheet Entry option within Task Maintenance. Therefore the Adjustment needs to be done via this form.

NOTE: If the Adjustment Option is taken against a Fee that is not associated with Timesheet Entries then the usual Fee Maintenance form will display.



Time Adjustment Form

Application Details - Description
The Application / Licence Number and property that the Timesheet Fee is for is displayed in this field.

Application Details - Fee
The Fee Description that the Adjustment is for is displayed in this field.

Application Details - Accepted
The Accepted field displays the Accepted Amount of the Fee. This value reflected the Accepted field displayed on the Fee Maintenance Form. This field is display only and cannot be maintained.

Application Details - Paid
The Paid field displays any payments that have been allocated against the Fee. This field reflects the Paid field displayed on the Fee Maintenance Form. This field is display only and cannot be maintained.

Application Details – Balance

The Balance field displays the Balance of the Fee (the Accepted Amount minus the Paid Amount). This field reflects the Balance field displayed on the Fee Maintenance Form. This field is display only and cannot be maintained.

Application Details – Minimum Fee
If there was a Minimum Fee defined for the Timesheet then it is displayed in this field. This field cannot be maintained.

Date
The Date field shows the Date for the Timesheet Entry.

User Identifier
The User Identifier shows the User that the Timesheet Entry has been entered for.

Time
The Time shown in this field represents the Time that has been entered on the individual Timesheet Entry. It is the values in this field that are able to be adjusted to adjust the Fee.

Where a Time has been adjusted previously then upon redisplaying this form the Time displayed will be the Adjustment Time and not the original Time entered on the Timesheet.

Hourly Charge Rate
The Hourly Charge Rate shown in this field is the actual Hourly Charge Rate that has been entered for the Timesheet. This value is used to calculate out the Fee Amount based on the Time field. Therefore if the Time field is changed then the Hourly Charge Rate is used to determine the new fee value. This field is display only and cannot be maintained.

Cost
The Cost Field displays the actual Fee Cost that the Timesheet Entry is calculated to. If the Time field is changed then the value displayed in this field is updated to reflect the new Cost of the Entry. This field is display only and cannot be maintained.

New Accepted Fee – Total Cost
Upon entry to the form the Total Cost reflects the total of the Cost fields displayed against each of the Timesheet Entries. If the Time field is changed and therefore the Cost field recalculated then the Total Cost field is also updated to reflect the change. This field is display only and cannot be maintained.

NOTE:- The Total Cost field represents the Total of the Costs fields displayed. It does not take into account any Minimum Fee that may have applied when the Fee was originally calculated and created from the Timesheet Entries.

New Accepted Fee – Comment
The Comment Field allows for the entry of any information regarding the changing of the Time Entries. This can be used to explain or notify of the reasons for the change.

Work Flow / Timesheets

There are four ways of accessing and / or maintaining Timesheet information.

- Via the module and focusing on the Task and selecting Workflow / Timesheets from the Dropdown Option
- Via the Time Option Button within the Task Maintenance form
- Via the Timesheet Search Profile Menu within Workflow Module
- Via the Timesheet Enquiry Menu within Workflow Module

This section describes all accesses available for Timesheets.

Timesheet Search Profile Form

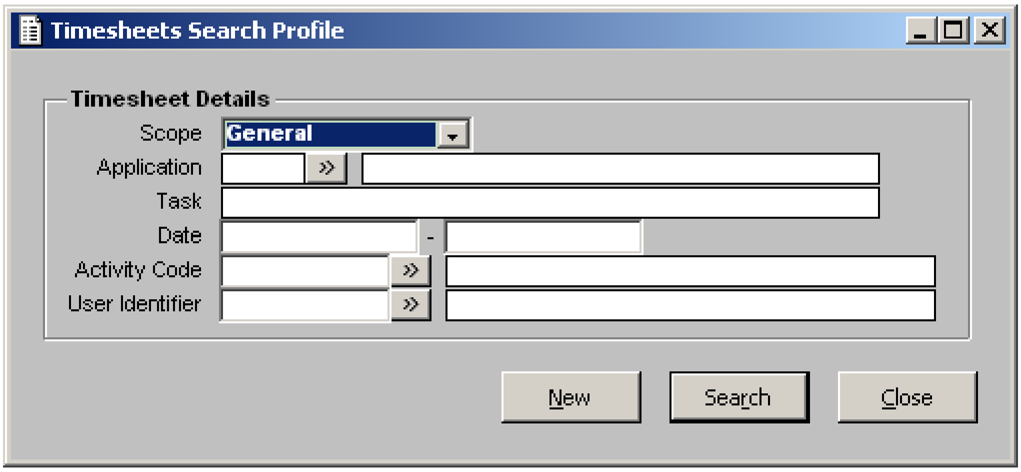
This form only displays when Timesheets are accessed the following ways:-

- via the Workflow / Timesheet Dropdown option from the Summary form
- via the Timesheet Enquiry Menu
- via the Timesheet Search Profile Menu

From this form the User is able to search for Timesheet entries. The fields on the form can be used together to refine the selection process.

It is also possible to update or add Timesheet entries for Tasks associated to Modules that allow for the entry of Timesheet information.

If adjustments or amendments are required for Timesheet entries against a module then it will be necessary for the User to select the required application module record to be adjusted.



Timesheet Search Profile Form

Timesheet Details - Scope
The Scope field allows the User to define how far the selection process is to be displayed. This field defaults to different values depending on how you have accessed the form. The options available from the dropdown and there use are

Task
When set to Task then any Timesheets displayed will be associated to the Task that is currently focused on the Summary Form.

Application Record
When set to Application Record then any Timesheets displayed will be associated to the Application / Licence currently being maintained.

General
When set to General then all Timesheets are displayed.

When the Time Sheet Search Profile Form is displayed via the Workflow / Timesheet Dropdown option from the Summary form whilst focused on a Task then the Scope field is defaulted to Task but can be changed to Application Record or General

When the Time Sheet Search Profile Form is displayed via the Timesheet Enquiry Menu then the Scope field is defaulted to General and cannot be changed.

When the Time Sheet Search Profile Form is displayed via the Timesheet Search Profile Menu then the Scope field is defaulted to General and cannot be changed.

Timesheet Details - Application

The Task field displays the Task Description that the cursor was positioned on when the Timesheet Option was selected. This information is display only and cannot be maintained or changed. This is only displayed when selected from the Options form or the Dropdown within the Application or Licensing Summary Form.

Timesheet Details - Task

The Task field displays the Task Description that the cursor was positioned on when the Timesheet Option was selected. This information is display only and cannot be maintained or changed. This is only displayed when

Timesheet Details - Date

The Date field can be used to refine the selection of Timesheets. If Timesheets are required for a particular date or range of dates then the required dates can be entered into the fields. If a specific date is required then enter in the date in both fields. If a range is required then enter the start date in the first field and the end date in the second field.

These can be left blank.

Timesheet Details – Activity Code

If Timesheets for a particular Activity are required then the Activity Code can be entered into this field. The Code can be keyed directly in or the Pop Up can be used to display a list of valid Activity Codes to select the required one.

Timesheet Details – User Identifier

Timesheets for a particular Identity can be requested by entering in the required Identifier in this field. The Identifier can be keyed directly in or the Pop UP can be used to display a list of valid Users to select the required one.

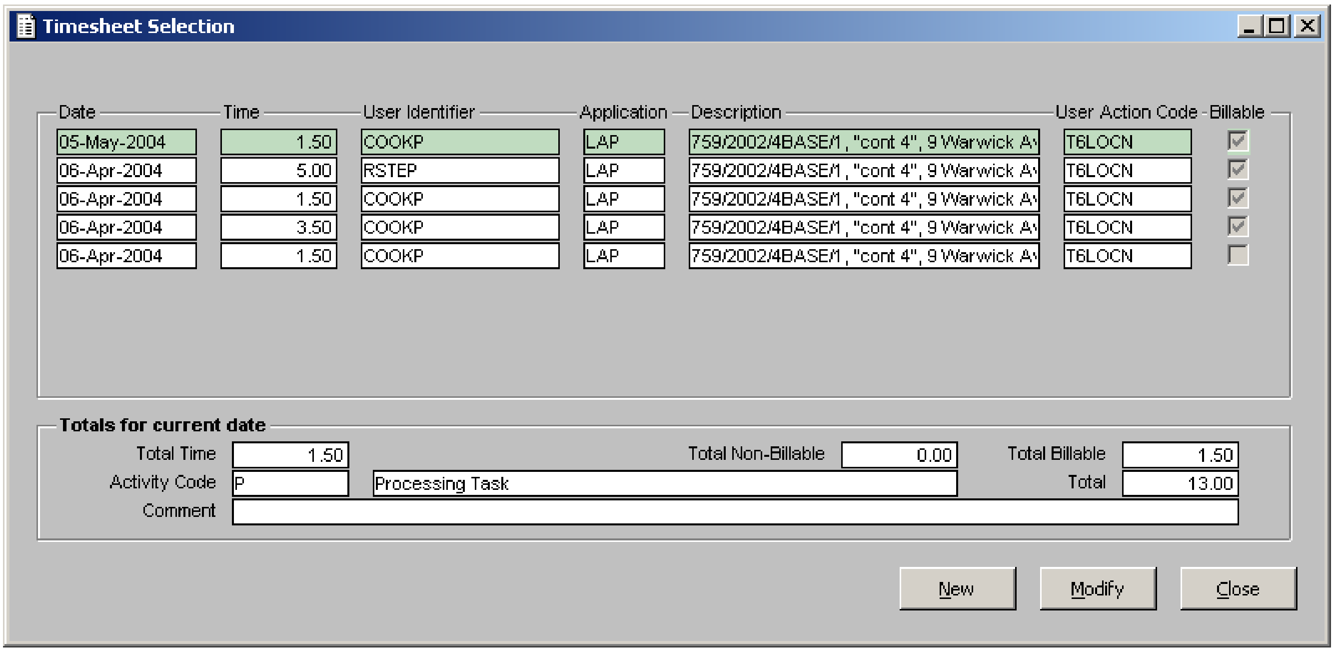
Timesheet Selection Form

This form only displays when Timesheets are accessed the following ways:-

- via the Workflow / Timesheet Dropdown option from the Summary form
- via the Timesheet Enquiry Menu
- via the Timesheet Search Profile Menu

From this form the User is able to select an existing Timesheet entry or add a new Entry.

This form also displays Total Times for Date therefore giving Times for a particular Task, User etc depending on the search criteria that had been nominated on the Timesheet Search Profile Form. When multiple days are displays and the User clicks on a Timesheet record for a different day, the Current Day Totals are updated and the Activity Code and Comment are displayed for the highlighted Timesheet entry.



Timesheet Selection Form

Date
The Date field represents the Timesheet Date. Where multiple days are displayed on the form and the User clicks on this field then the Current Day Totals will be updated to reflect the Day Totals for all entries that are shown on the form with the same Date that is currently in focus.

Time
The Time field displays the amount of Time that has been recorded for the Timesheet Entry.

User Identifier
The User Identifier that the Timesheet Entry is recorded for is displayed in this field.

Application
The Application that the Timesheet Entry has been entered for is displayed in this field. If the Application field is blank then the Timesheet Entry has been entered for time that is not against a particular Task i.e. for Annual Leave, Sick Leave etc.

If the Application field is not blank, then it will display the Module that the Timesheet Entry is for i.e. LAP for Application, ACR for Customer Requests.

Description
The Description field displays the Module Record that the Timesheet Entry has been entered against. This could be the Application Number & Address, the Customer Request Number & Request Type or in the case of a General Entry this field will display the description of the Activity Code that has been used on the Timesheet Entry.

User Action Code
The User Action Code is the Workflow User Action that the Timesheet Entry has been entered against. If the Entry has been entered without an Application i.e. is a General Entry then this field is blank.

Billable
The Billable flag displays whether the Timesheet Entry is billable time or not.

Totals for Current Date – Total Time
The Total Time represents the Total Amount of Time that has been entered for the Timesheets currently included on the Selection form that have the same Date that the Timesheet Entry has that is currently highlighted on the Selection Form. If the focus is moved to another entry that has a different Date then the information in this field will be changed to reflect the Total Time for the Date currently now highlighted.

Totals for Current Date – Total Non Billable

The Total Non Billable field represents the Total Amount of Time that is Non-billable that has been entered for the Timesheets currently included on the Selection form that have the same Date that the Timesheet Entry has that is currently highlighted on the Selection Form. If the focus is moved to another entry that has a different Date then the information in this field will be changed to reflect the Total Non-Billable Time for the Date currently now highlighted.

Totals for Current Date – Total Billable
The Total Billable field represents the Total Amount of Time that is Billable that has been entered for the Timesheets currently included on the Selection form that have the same Date that the Timesheet Entry has that is currently highlighted on the Selection Form. If the focus is moved to another entry that has a different Date then the information in this field will be changed to reflect the Total Billable Time for the Date currently now highlighted.

Totals for Current Date – Activity Code

The Activity Code and its Description are displayed for the Timesheet Entry currently highlighted on the Selection Form.

Totals for Current Date - Total
The Total field represents that sum of all the Timesheet Entries that are currently displayed on the Selection Form.

NOTE: This field is only displayed when the form has been accessed via the Workflow / Timesheet Dropdown Option from the Summary Form.

Totals for Current Date - Comment
The Comment field displays the Comments that have been entered for the Timesheet Entry currently highlighted on the Selection Form.

Timesheet Maintenance Form

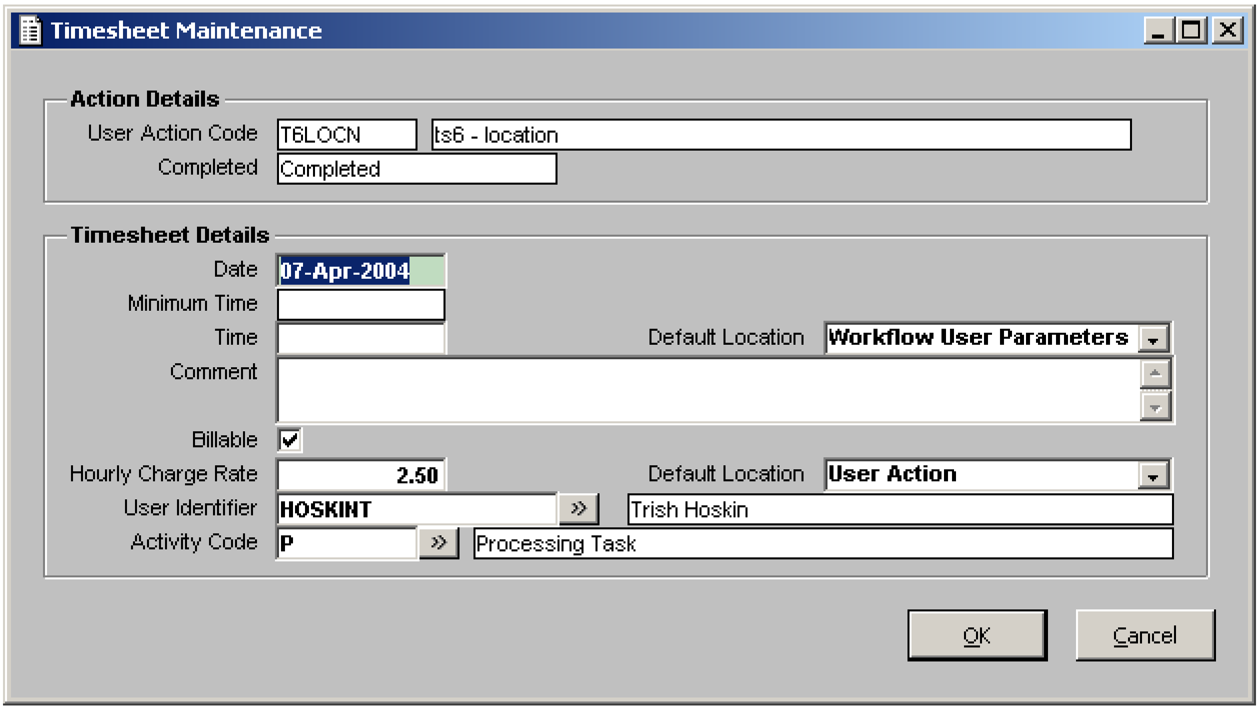
The Timesheet Maintenance Form allows the entry and maintenance of Timesheet Entries for a Task. If the Task has been 'Completed' then the Timesheet Maintenance Form is in Display Mode only and no information can be updated or changed.

This form displays under the following steps

- New Button is selected via the Workflow / Timesheet Dropdown option from the Summary Form
- New Button is selected via the Timesheet Option Button on the Task Maintenance Form
- Modify Button is selected via the Timesheet Option Button on the Task Maintenance Form.

NOTE: When this form has been accessed via the Workflow / Timesheet Dropdown Option then the User Identifier is defaulted as the Responsible Officer for the Task and not the person signed onto Pathway.

If accessed via any other option then the User Identifier is defaulted to the person signed onto Pathway.



Timesheet Maintenance Form

Action Details – User Action Code

These fields display the User Action Code and Description which the Timesheet Entry is for. These fields are display only.

Action Details - Completed

This field displays the Completed Status of the User Action.

Timesheet Details - Date

Upon entering in a New Timesheet Entry the Date field is defaulted to Today's Date. This can be changed to another date if Today's date is not correct. The Calendar function is available for this field to select the required Date if the User is not sure of the correct entry.

Timesheet Details – Minimum Time

The Minimum Time field defaults to that of the value for the nominated Default Location for the Minimum Time. This field is display only and cannot be maintained. However if the Default Location value for the Minimum Time is changed then this field is changed to reflect the value for the new Default Location.

Refer to the Help Text on the Default Location (Minimum Time) field for an explanation of how the Default is determined.

Timesheet Details - Time

The Time field defaults to the value of the Minimum Time field upon entering into this form. This is so the user knows that there is a Minimum Time that is to be used for the User Action. This field can be changed to reflect the actual time that is required to be recorded for the Timesheet.

NOTE: The Time field is default to the value of the Minimum Time upon entering into the form. If the Default Location for the Minimum Time is changed then the Time field is not updated with the new value for the Minimum Time. The Time field will remain as it was or has been changed to.

Timesheet Details – Default Location (Minimum Time)

The Default Location for the Minimum Time is determined depending on how the Minimum Time has been defined in the parameters and by the User Identifier that has been entered on the Timesheet Entry form.

The following is how the Minimum Time value will be defaulted at the time the Timesheet entry is being entered.

- If there is an entry in the Minimum Time field on the User Action form then it is defaulted in
- If there is no entry in the Minimum Time field on the User Action then the Minimum Time entered against the current User in the Responsibility Group of the Task will be defaulted in
- If there is no entry in the Minimum Time field for the User in the Responsibility Group of the Task then the Minimum Time field on the Workflow User Parameter will be defaulted in
- If there is no entry in the Minimum Time field on the Workflow User Parameter for the User then the field will be defaulted in as blank

If the User changes the Default Location then the Minimum Time field is updated to reflect the value for the selected Default Location. If the User selects a Default Location that has no information defined for the Minimum Time then the Minimum Time field will display Blank.

The Dropdown Options available for the Default Location are:-

- User Action (Workflow Parameters)
- Group Member (Responsibility Structure)
- Workflow User Parameters (Workflow Menu)
- (none)

Timesheet Details - Comment

The Comment Area can be used to record information pertaining to the Timesheet Entry. This is helpful if there is a requirement to look at the Timesheet entry and evaluate the information recorded.

Timesheet Details - Billable

The Billable flag is copied from the User Action that the Timesheet Entry is being entered for. This Timesheet Entry can be changed to ‘Non-billable’ by setting the flag ‘Off’.

Timesheet Details – Hourly Charge Rate

The Hourly Charge Rate field defaults to that of the value for the nominated Default Location for the Hourly Charge Rate. This field is display only and cannot be maintained. However if the Default Location value for the Hourly Charge Rate is changed then this field is changed to reflect the value for the new Default Location.

Refer to the Help Text on the Default Location (Hourly Charge Rate) field for an explanation of how the Default is determined.

Timesheet Details – Default Location (Hourly Charge Rate)

The Default Location for the Hourly Charge Rate is determined depending on how the Hourly Charge Rate has been defined in the parameters and by the User Identifier that has been entered on the Timesheet form.

The following is how the Hourly Charge Rate value will be defaulted at the time the Timesheet entry is being entered.

- If there is an entry in the Hourly Charge Rate field on the User Action form then it is defaulted in
- If there is no entry in the Hourly Charge Rate field on the User Action then the Hourly Charge Rate entered against the current User in the Responsibility Group of the Task will be defaulted in
- If there is no entry in the Hourly Charge Rate field for the User in the Responsibility Group of the Task then the Hourly Charge Rate field on the Workflow User Parameter will be defaulted in
- If there is no entry in the Hourly Charge Rate field on the Workflow User Parameter for the User then the field will be defaulted in as blank

If the User changes the Default Location then the Hourly Charge Rate field is updated to reflect the value for the selected Default Location. If the User selects a Default Location that has no information defined for the Hourly Charge Rate then the Hourly Charge Rate field will display Blank.

The Dropdown Options available for the Default Location are:-

- User Action (Workflow Parameters)
- Group Member (Responsibility Structure)
- Workflow User Parameters (Workflow Menu)
- (none)

Timesheet Details – User Identifier

Upon entry into the Timesheet Entry form the User Identifier is defaulted to that of the User who is the Responsible Officer for the Task. The User Identifier can be changed to another User if the Timesheet Entry is not for the Responsible Officer. If the User Identifier is not known then the Pop Up button can be used to display a list of value Users to select from.

As the Default Location information for the Minimum Time and Hourly Charge Rate are determined by the User defaulted into this field upon entering the form, if the User Identifier is changed then the Default Locations information is also updated. It will change to reflect the new User Identifier's defaults using the process defined in the Default Location help text.

NOTE: When this form has been accessed via the Workflow / Timesheet Dropdown Option then the User Identifier is defaulted as the Responsible Officer for the Task and not the person signed onto Pathway.

If accessed via any other option then the User Identifier is defaulted to the person signed onto Pathway.

Timesheet Details – Activity Code

The Activity Code defaults from the Workflow User parameter if there is an entry for the User Identifier that has been nominated on the Timesheet Entry form. This Activity Code can be changed to another Valid Code by entering in the required Code or using the Pop Up to display a list of valid Activity Codes.

Application/Licence Timesheet Entry

New timesheet entry functionality has been provided to allow quicker entry of timesheets for work performed on Applications and Licences.

NOTE: The new Timesheet Entry function will be available only to sites that have the required authority. Contact your Account Manager if your site requires this new functionality.

TIMESHEET PARAMETER MAINTENANCE

This new parameter option (Workflow > Timesheet Entry > Timesheet Week) has been provided to allow the site to set how their Timesheet week is determined e.g. Monday to Sunday or Monday to Friday etc. This parameter will be used when displaying the relevant Timesheet Records in the new Timesheet Selection form.

USER PARAMETER MAINTENANCE

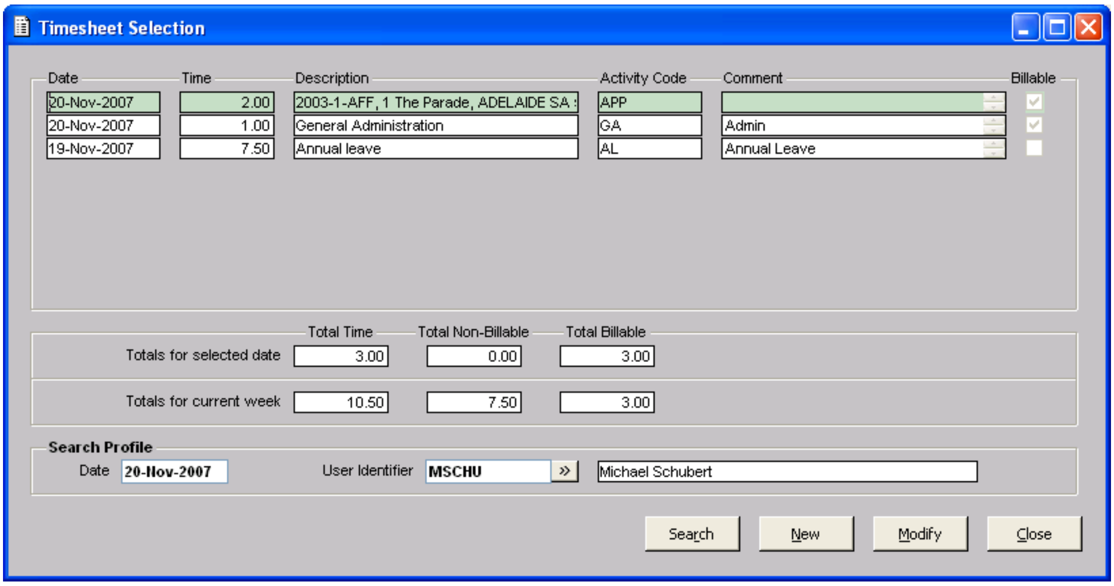
This existing parameter option (Workflow > User Parameter Maintenance) has been enhanced to allow each user to have their own a Default Activity set. When timesheet entries are being entered for a user in the new Timesheet Entry form their Default Activity will be automatically loaded into the entry.

TIMESHEET ENTRY

This new function is accessed from the new Workflow > Timesheet Entry > Timesheet Entry option.

Timesheet Selection form

Selecting this option presents the Timesheet Selection form. This form will not show any timesheet entries initially; the User Identifier field will be automatically set to the user that is signed on.



Pressing the Search button will load the timesheets for the nominated user for the week pertaining to the nominated Search Profile date - if no date is nominated then the current date is used. The system will interpret this date based on the value entered in the Timesheet Week parameters and display the records for that week for that particular user. The latest entries will be displayed at the top of the form.

There are two ‘totals’ lines:-

1) Totals for selected date:
- This shows the total of the timesheet entries for the timesheet entry line that has focus.
- If there is a timesheet entry for the Search Profile date then the first entry for that date will get focus automatically upon pressing Search and thus show the total time for that date. If this is not the case then no entry line will get focus leaving the totals empty.

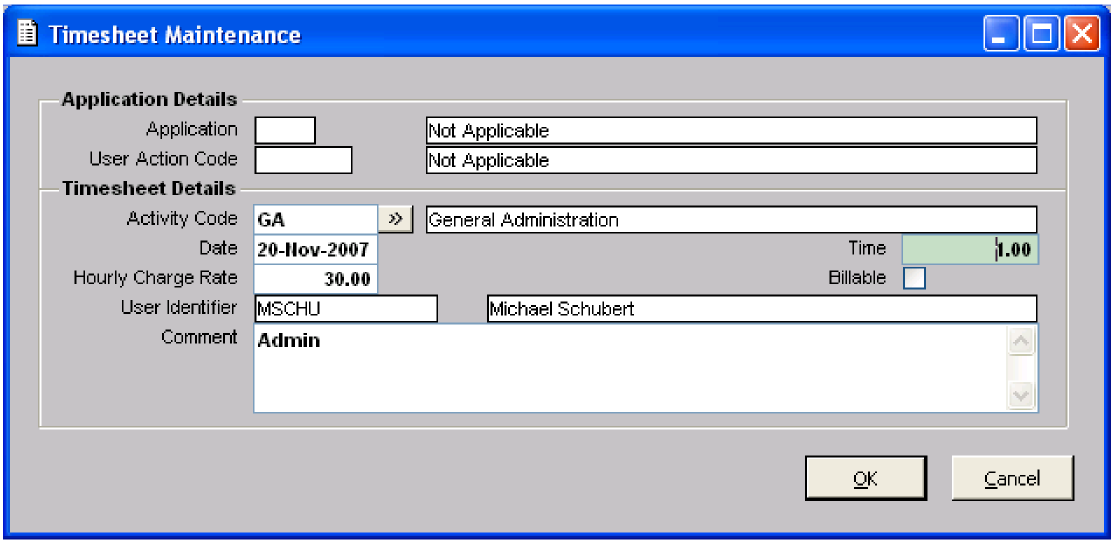
2) Totals for current week:
- This shows the total of the timesheet entries for the week as dictated by the nominated Search Profile date.

Note:-
If the nominated date is not within a Timesheet Week when Search is pressed, a message is shown on the message line and the entered date is highlighted. If there are no entries for the week then a message is shown in the message line.

Pressing the Modify button for an existing entry will show the standard Timesheet Maintenance form. Pressing the New button will present the new Timesheet Entry form.

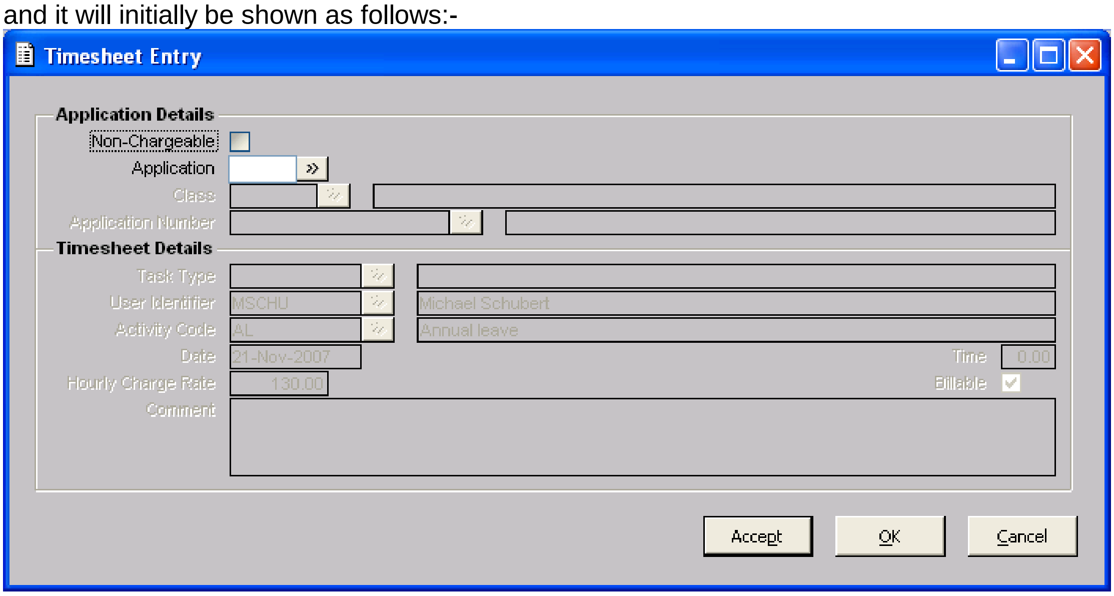
Timesheet Maintenance form

Pressing the Modify button on the Timesheet Selection form will show the standard Timesheet Maintenance form. Note: The Entry will not be able to be maintained if the Timesheet Entry is for a Task which is Completed.



Timesheet Entry form

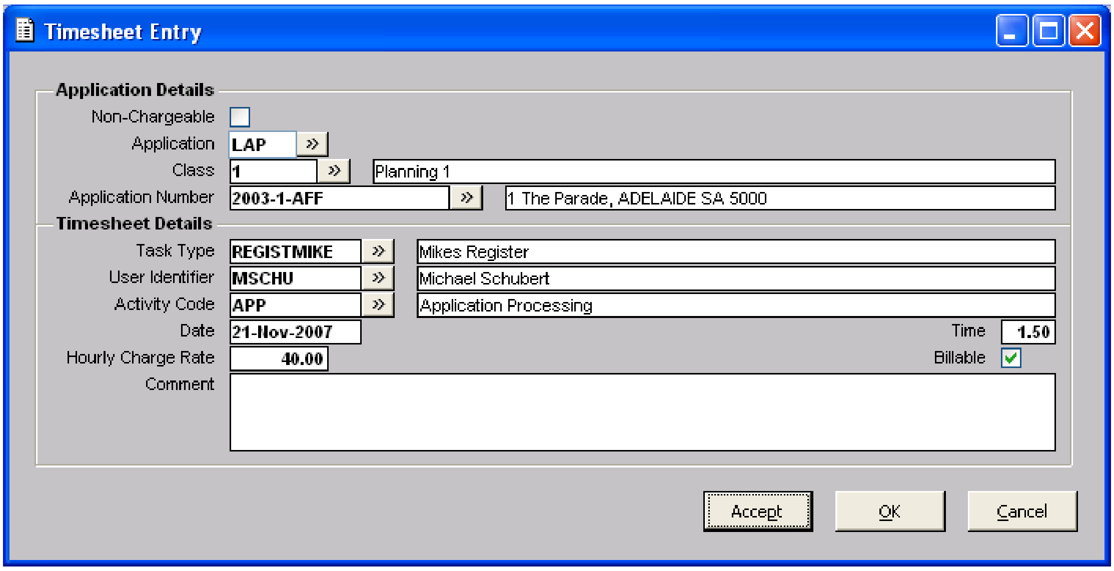
Pressing the New button on the Timesheet Selection form will present the new Timesheet Entry form, and it will initially be shown as follows:-



Timesheet entries can be entered for a specific Application/Licence or not as governed by the setting the Non-Chargeable checkbox – this also controls which fields are relevant for entry. By leaving the Non-Chargeable checkbox unchecked details can be entered for a specific Application/Licence. By checking it on 'Non-Chargeable' entries can be entered, in which case the cursor is automatically placed into the Activity Code field.

Entering details for a specific Application/Licence

The following will occur when entering details for a specific Application/Licence (i.e. the Non-Chargeable checkbox is unchecked). An entry with all the details entered looks as follows. Note that fields are only shown when previous fields have had details entered or chosen (e.g. the Application Number can not be entered until the Class has been nominated).



The Application can be chosen by entering ‘LAP’ or ‘LLC’ or by using the Popup/double clicking in the field. Once a valid code is present the Class field is made available.

The Class can be chosen by entering the Class code or by using the Popup. Only Classes the user is authorised to can be entered. Once a valid code is present the Application Number field is made available.

The Application Number can be chosen by entering certain details of the Application/Licence Number or by using the Popup. If the Application Number is to be entered directly into the field it is to be entered in the format of ‘Number/Year/Type’ (i.e. having ‘/‘ separators between each identifier). For example, to enter details for Application Number 1 enter ‘1’; to enter details for Application Number 1 and Year 2007 enter ‘1/2007’. Details can be entered with any number of the identifiers; e.g. details could be entered as ‘/2007/AT1’ which would cause the Application/Licence Selection form to be displayed showing all the Applications for the 2007 Year of the AT1 Type. If the entered details can be resolved to a specific Application the formatted Application Number is loaded into the field. Where there is more than one occurrence of the number such as would be the case with Staged or Amended numbers, the user would be presented with the Application/Licence Selection form to choose the correct record. Note: The formatted Application Number loaded to the form may be in different format to the ‘Number/Year/Type’ entry format as governed by the formatting parameters. Therefore if the Application Number chosen is to be changed the user must enter the new details in the ‘Number/Year/Type’ entry format.

The Task Type can be chosen by entering the code or by using the Popup. Only Tasks that have been defined in the parameters as a Timesheet Task can be entered / chosen. A Timesheet Task is denoted by the Task having any action associated to it that has ‘Time Recording’ ticked on.

When leaving the Task Type field the form checks the status of that Task on the nominated Application/Licence. The following scenarios can occur:-

1) The Task is not found on the Application or it is found but it is Completed.

In this case the user is asked if they wish to create a new occurrence of that Task.

Answering ‘Yes’ will attempt to create an entry of that Task against the Application/Licence and start the Task which will cause the existing Timesheet Maintenance form to be presented allowing Timesheet details to be entered. Once the task actions have been completed the new Timesheet Entry form is redisplayed with the Application and Class retained and the Application Number etc. cleared for the next entry.

If the user does not have authority to Insert Tasks then an error message will be shown and the timesheet entry can not be proceeded with.

The Task that was created will be positioned within the existing set of Tasks for the Application/Licence according to the Class's Workflow 'Task Sequence' parameter. If this parameter is set to 'As Entered' then the new task will be created as the first Task of the Application/Licence so that it is shown at the top of the of the list of workflow Tasks.

Answering 'No' will not create an entry of that Task, and will clear out the Application Number and Task and position the cursor in the Application Number field.

2) The Task is on the Application and is Started but not Completed.

In this case the timesheet entry can be entered in the bottom half of the form. See further details in the next section that describes the functionality available in the bottom half of the form.

If the Task has multiple Actions which have Time Recording checked On then the timesheet will be linked to the first Action of the Task as per existing functionality. In this instance the 'Additional User Actions may also require Timesheets. Access these Actions through Task Maintenance' warning message will be shown per existing functionality.

3) The Task is on the Application but is not Started.

In this case the Task will be started allowing timesheets to be entered as part of that task. Once completed the new Timesheet Entry form is redisplayed with the Application and Class retained and the Application Number etc. cleared for the next entry.

Entering details in the bottom half of the form.

Details are entered in this part of the form when:-
1. Timesheet entries are not being entered for a specific Application/Licence or,
2. Timesheet entries are being entered an Application/Licence and the nominated Task is already started but not yet completed.

The User Identifier is defaulted to the User nominated on the Timesheet Selection form. The user can then be changed on the Timesheet Entry form and will be retained until the Timesheet Entry form is exited. Based upon the User selected the form will load the Default Activity and Hourly Charge Rate as set in the User Parameter Maintenance. Where no default Activity has been set the field will be left blank with the ability to key directly into the field or selected.

An Activity must be entered when a timesheet is not being entered for a specific Application/Licence. If details are being entered for a specific Application/Licence then an Activity must be entered if the Class has the Mandatory Activity parameter checked on (this parameter is within the Application/Licence Parameters menu option - in the Workflow > Work Flow Application Maintenance parameter).

The Date field defaults to the current date but can be changed. If a date is changed it will remain until the user returns to the menu or changes it to a different date. This allows users to continuously key a number of timesheets for any given date without having to continually change the date. If a date is entered that does not fall within the defined Timesheet Week then a warning message is issued when the Accept or OK buttons are pressed, allowing the user to accept the entry or to correct it.

Hourly Charge Rate is set to zero if Non-Chargeable is checked on, and reset to the default rate for the nominated User if Non-Chargeable is checked off.

The Billable flag is defaulted checked off if Non-Chargeable is checked on, and checked on if Non-Chargeable is checked off. If it is changed to be off for a Chargeable entry the Hourly Charge Rate is set to zero.

A Comment must be entered when a timesheet is not being entered for a specific Application/Licence. If details are being entered for a specific Application/Licence then a Comment must be entered if the Class has the Mandatory Comment parameter checked on (this parameter is within the

Application/Licence Parameters menu option - in the Workflow > Work Flow Application Maintenance parameter).

<u>Other</u>

Once details have been entered they can be accepted by pressing the Accept button, the F6 button or the OK button as follows:-

- Pressing the Accept button or F6 button will validate the entry and if correct store the details, then show the ‘Timesheet Entry added’ message and refresh the form for the next entry. In the case where an entry was made for a specific Application/Licence some of the entered details will be retained for the next entry (e.g. the Class, Application Number, Task Type, etc.). The Activity Code and the Hourly Charge Rate will be refreshed to the defaults for the User. The Time, Billable and Comment fields will be reset ready for the next entry. Retained details can be changed for the next entry or the Non-Chargeable field can be used to change the entry mode thus causing certain fields to be cleared.
  Note: The Task Type is retained in certain circumstances, but is cleared when the Class is changed as the actual Task Type for one Class is difference to a Task Type for another Class even though the two Tasks may have the same code.
- Pressing the OK button will validate the entry and if correct store the details and return to the Timesheet Selection form.

To allow quicker entry, tabbing from one field to the next has been enabled so that the tab button only needs to be pressed once to move to the next input field. This is useful for those fields which have a Popup button – for example, when a Class code has been entered into the Class field the tab button only has to be pressed once for the cursor to be placed into the Application Number field.

Work Flow Task Search Profile

There are two ways of accessing and maintaining task information.

- Via an Application Record e.g. Customer Request
- Via the In-Tray concept.

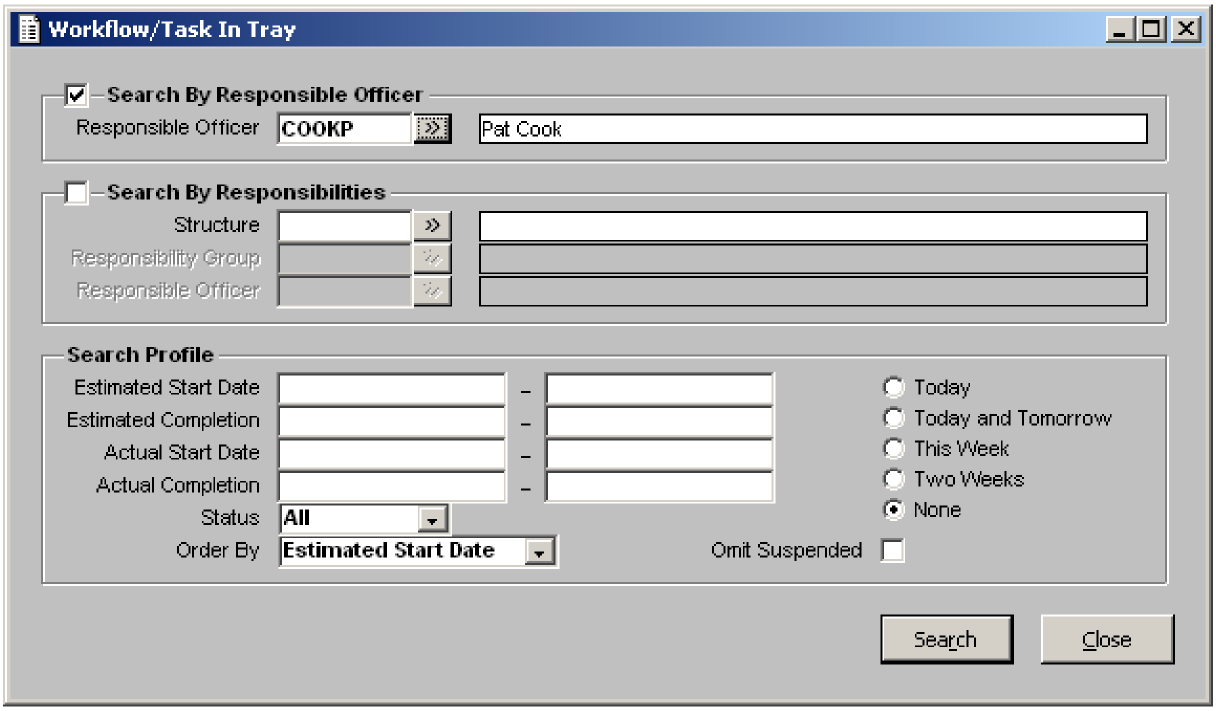
This section describes all forms within the Work Flow process accessible via the Work Flow menu option.

Workflow/Task In Tray Form

This form is accessible via the Work Flow menu item.

This form allows you to enter search criteria to be performed over tasks. When the Search Button is pressed all tasks matching the search criteria entered will be displayed (subject to security).

Set up a default Retrieve Search Profile that will be entered automatically for you when opening this form. (Search Menu, Save) e.g. if you consistently use a profile of your user name and a Status of Incomplete enter the appropriate fields and select Search from the Menu and then Save Search Profile as Favourite. Give the search profile a name e.g. “My default” and check the default box to on. Only one search profile may be nominated as the default.



Workflow/Task In Tray Form

Search by Responsible Officer
If this flag is turned on then the search will be performed over the user id entered plus any values entered in the Search Profile area at the bottom of the form.

Responsible Officer
If you wish to search via a specific user name then enter a valid user id in this field. Alternatively select a user from the pop up by pressing the pop up button associated with the field.

If you try and search for a user name that is "higher" in the responsibility structure the system will not return any results. E.g. the user nominated as a parking inspector will not be able to retrieve tasks for the user nominated as the City Manager.

Only tasks where the user name has been recorded as the Responsible Officer for a task will be displayed. Tasks where no responsible officer has been nominated will not be returned (even though a group may have been assigned to the task for which the entered user belongs.)

This field works in conjunction with values entered in the Search Profile area at the bottom of the form.

Search by Responsibilities
If this flag is turned on then the search will be performed over the values entered in the Structure, Responsibility Group and Responsible Officer plus any values entered in the Search Profile area at the bottom of the form.

Structure

Enter a valid structure code directly into the field or alternatively press the pop up button to select from the pop up list.

If the Search Button is pressed without entering a Group or Responsible Officer then all tasks that have been assigned to this structure will be retrieved. The system will then determine (based on the structure hierarchy) which tasks you are able to view.

Responsibility Group

Enter a valid Responsibility Group code directly into the field or alternatively press the pop up button to select from the pop up list.

If a Structure has been nominated in the previous field then only Responsibility Groups contained within that structure will be displayed in the pop up list.

If no Structure has been nominated in the previous field than all Responsibility Groups within Pathway will be displayed in the pop up list.

When the Search Button is pressed all tasks that have been assigned to the nominated Responsibility Group will be retrieved. The system will then determine (based on the structure hierarchy) which tasks you are able to view.

Responsible Officer

Enter a valid user id code directly into the field or alternatively press the pop up button to select from the pop up list.

If a Responsibility Group has been nominated in the previous field then only users contained within that Group would be displayed in the pop up list.

If no Group has been nominated in the previous field then all Users within Pathway will be displayed in the pop up list.

When the Search Button is pressed all tasks that have been assigned to the nominated Responsible Officer will be retrieved. The system will then determine (based on the structure hierarchy) which tasks you are able to view.

Period
This radio group contains the following options and enables the user to quickly define search criteria. Selecting one of the periods will default the Estimated Start Date range with specific dates.

- **Today** – Today is defined as the current day as per the system date and time.
- **Today & Tomorrow** – Today & Tomorrow, where Tomorrow is defined as the next Calendar day.
- **This Week** – This Week is defined as the days from Monday through Sunday. If today is Wednesday then tasks will be shown for the previous Monday and Tuesday and then all tasks through to Sunday.

- **Two Weeks** – Two Weeks is defined as the days from Monday through to Sunday week. If today is Wednesday then tasks will be shown for the previous Monday and Tuesday and then all tasks for the current week, and next week through to the Sunday.
- **None** – Dates will not be defaulted to the Estimated Start Date range.

Estimated Start Date (From / To)

By entering dates into these fields the search will be restricted to tasks where the estimated start date matches that entered. (Of course the search will also consider the other search criteria entered on the form.)

If no “to” date is entered then the search will return all tasks where the estimated start date is greater than or equal to the “from” date.

Example 1
Entering 1/6/99 in the “from” date field will return all tasks with an estimated start date greater than 1/6/99 00:00:00

Example 2
Entering 1/6/99 in the “from” date field and 2/6/99 in the “to” date field will return all tasks with an estimated start date between 1/6/99 00:00:00 and 2/6/99 00:00:00. This would effectively be all tasks estimated to start on 1^{st} June 1999.

⚐ As this field is a Date/Time field the following should be noted. Dates entered in this field will assume a time of 00:00:00 therefore results may not be what was expected. E.g. if you wish to search for all tasks with an estimated start date from the 1^{st} April to the 5^{th} April (inclusive) then the from and to date range will need to be 1^{st} April to the 6^{th} April.

Estimated Completion Date (From / To)

By entering dates into these fields the search will be restricted to tasks where the estimated completion date matches that entered. (Of course the search will also consider the other search criteria entered on the form.)

If no “to” date is entered then the search will return all tasks where the estimated completion date is greater than or equal to the “from” date.

Example 1
Entering 1/6/99 in the “from” date field will return all tasks with an estimated completion date greater than 1/6/99 00:00:00

Example 2
Entering 1/6/99 in the “from” date field and 2/6/99 in the “to” date field will return all tasks with an estimated completion date between 1/6/99 00:00:00 and 2/6/99 00:00:00. This would effectively be all tasks estimated to be completed on 1^{st} June 1999.

⚐ As this field is a Date/Time field the following should be noted. Dates entered in this field will assume a time of 00:00:00 therefore results may not be what was expected. E.g. if you wish to search for all tasks with an estimated completion date from the 1^{st} April to the 5^{th} April (inclusive) then the from and to date range will need to be 1^{st} April to the 6^{th} April.

Actual Start Date (From / To)

By entering dates into these fields the search will be restricted to tasks where the actual start date matches that entered. (Of course the search will also consider the other search criteria entered on the form.)

If no “to” date is entered then the search will return all tasks where the actual start date is greater than or equal to the “from” date.

Example 1
Entering 1/6/99 in the “from” date field will return all tasks with an actual start date greater than 1/6/99 00:00:00

Example 2

Entering 1/6/99 in the “from” date field and 2/6/99 in the “to” date field will return all tasks with an actual start date between 1/6/99 00:00:00 and 2/6/99 00:00:00. This would effectively be all tasks started on 1^{st} June 1999.

> As this field is a Date/Time field the following should be noted. Dates entered in this field will assume a time of 00:00:00 therefore results may not be what was expected. E.g. if you wish to search for all tasks with an actual start date from the 1^{st} April to the 5^{th} April (inclusive) then the from and to date range will need to be 1^{st} April to the 6^{th} April.

Actual Completion Date (From / To)

By entering dates into these fields the search will be restricted to tasks where the actual completion date matches that entered. (Of course the search will also consider the other search criteria entered on the form.)

If no “to” date is entered then the search will return all tasks where the actual completion date is greater than or equal to the “from” date.

Example 1
Entering 1/6/99 in the “from” date field will return all tasks with an actual completion date greater than 1/6/99 00:00:00

Example 2
Entering 1/6/99 in the “from” date field and 2/6/99 in the “to” date field will return all tasks with an actual completion date between 1/6/99 00:00:00 and 2/6/99 00:00:00. This would effectively be all tasks completed on 1^{st} June 1999.

> As this field is a Date/Time field the following should be noted. Dates entered in this field will assume a time of 00:00:00 therefore results may not be what was expected. E.g. if you wish to search for all tasks with an actual completion date from the 1^{st} April to the 5^{th} April (inclusive) then the from and to date range will need to be 1^{st} April to the 6^{th} April.

Status
Five values are available for this field:-
All
By selecting “All” as the Status then tasks will displayed irrespective of their start or completion status.

Complete
By selecting “Complete” as the Status then only tasks which have been started and completed will be displayed.

Current
By selecting “Current” as the Status then only tasks that are ready to be started, but not yet started, will be displayed. “Ready to be started” means that all dependent previous tasks have been completed.

Incomplete
By selecting ‘Incomplete’ as the Status then only tasks which have been started but not yet completed, will be displayed.

Pending
By selecting “Pending” as the Status then only tasks that have not been started and are not Current will be displayed.

Order By
Two options are available in this drop down:-

Estimated Start Date – The Tasks will be sorted on the Task Selection form by ascending Estimated Start Date order.
Application Occurrence – The Tasks will be sorted in ascending Estimated Start Date order grouping all the tasks for an Application Occurrence together.

> Using Order By Application Occurrence will be slower than sorting just by Estimated Start Date.

Omit Suspended
When the Flag is checked ON any tasks that have a suspension active will not be listed in the selection form for maintenance.

When the Flag is checked OFF all task whether suspended or not will be included in the selection criteria.

Task Selection Form

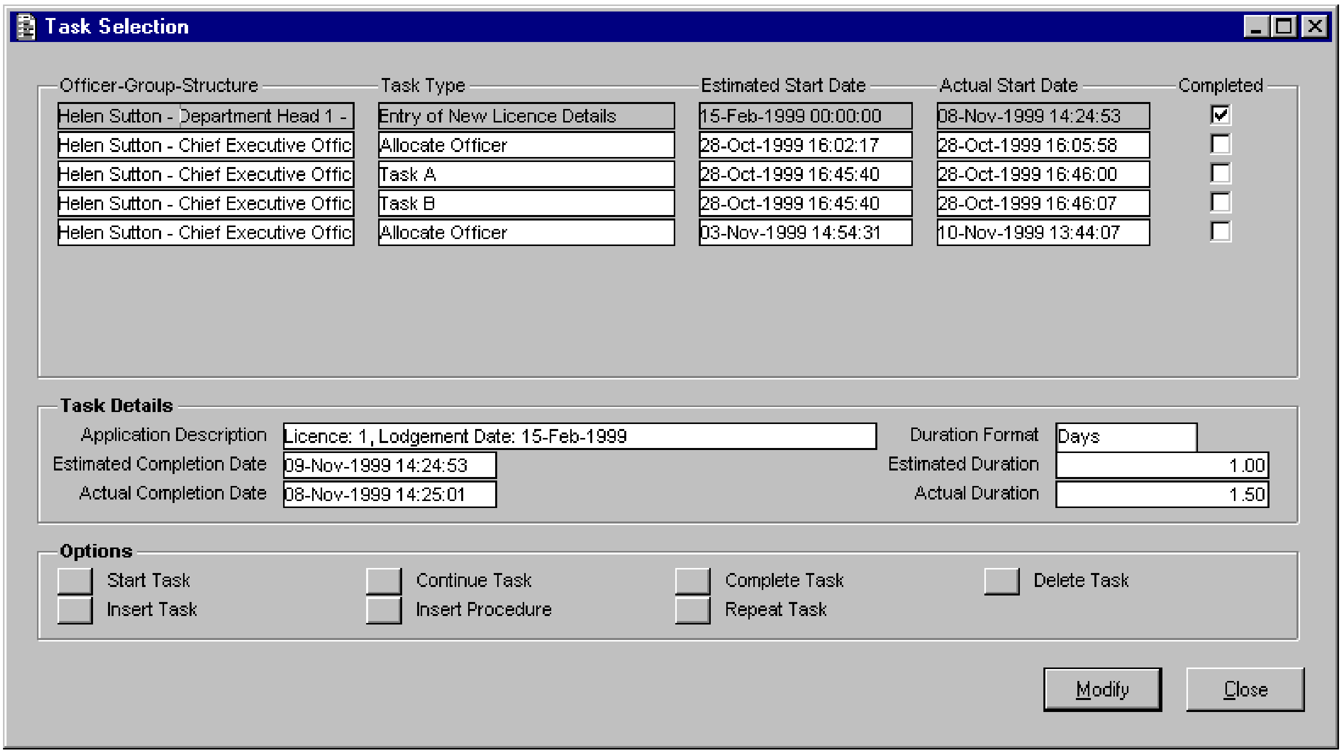
This form is presented when Search is pressed from the Workflow/Task In Tray Menu and displays all tasks matching the search criteria entered.

If only one task matches the search criteria then this form is bypassed and the Task Maintenance form is displayed.

The form is broken up into three sections. The top section describes each of the tasks in summary form. The centre section displays further details for individual tasks. As you click on each task the details will be displayed in the centre section. The bottom section provides specific maintenance options that may be performed on this form.

The display order is by Responsible Officer then by Estimated Start Date ascending (i.e. oldest to newest).

NOTE: Multi select is only valid when using the Modify Button or the Delete Option. All other Options available do not use the Multi Select function.



Task Selection Form

Officer – Group - Structure
This field displays the responsibility structure, group and officer assigned to the task.

This field is display only and may not be maintained.

Task Type
This field contains the task description.

This field is display only and may not be maintained.

Estimated Start Date
This field displays the current estimated start date and time for each task.

The value in this field may not necessarily be the same as the original estimated start date.

The value in this field is recalculated if additional tasks are added or tasks are deleted.

This field is display only and may not be maintained.

Actual Start Date
This field displays the actual date and time the task was started. A task is started either manually by a user or automatically by a preceding task. If this task has not been started then this field will be blank.

This field is display only and may not be maintained.

Completed
If the task has been completed then this check box will be flagged on. This field is display only and may not be maintained.

Application Description
This field displays information about the record to which this task is linked e.g. customer request number and type. This field is display only and may not be maintained.

Estimated Completion Date
This field displays the current estimated date and time on which the task should be completed.

The value in this field may not necessarily be the same as the original estimated completion date. The value in this field is recalculated if additional tasks are added or tasks are deleted.

This field is display only and may not be maintained.

Actual Completion Date
This field displays the actual date and time the task was completed. If the task is not completed then this field will be blank.

A task is completed manually by a user. This field is display only and may not be maintained.

Duration Format
This field contains the format in which the Estimated duration has been given.

Valid values are:-
- Minutes
- Hours
- Days
- Weeks
- Months
- Years

This field is used in conjunction with the Estimated Duration and Calendar format fields to provide estimated dates for the task.

For more information refer to help on the Estimated Duration field.

Estimated Duration
This field displays the estimated time that is required to complete the task. The value in this field is established at the Task Type parameter level. The value displayed is used in conjunction with the Duration Format field.

Example
If duration is 1.00 and the Duration Format field is set to hours then the estimated duration would be 1 hour.

This field is display only and may not be maintained.

Actual Duration
This field displays the actual amount of time that the task took to complete.

The duration is recorded as per the Duration Format field.

Example
If the Duration Format field is set to Days then entering 1.5 will register as 1.5 days.

This field is display only and may not be maintained.

Start Task Button
Pressing this button will start the selected task.

All Actions nominated as “Start” actions will be performed. The Actual Start Date of the task will be updated with the current system date and time.

The task will not be started if:
- dependent previous tasks have not been completed
- the task is already started

Continue Task
Pressing this button will continue the selected task.

The Continue button will perform any Start Actions that have not previously been completed.

The task will not be continued if the task has not been started

Complete Task
Pressing this button will complete the current selected task.

All Actions nominated as “End” actions will be performed. Any dependent next tasks will be automatically started. The Actual Completion Date of the task will be updated with the current system date and time.

The Task will not be completed if:
- the task has not been started
- there are any outstanding “Start” actions (in which case you should choose Continue Task)

Delete Task
Pressing this button will delete any tasks that are not required. Multi Select is available for this Option only.

Tasks may not be deleted if:
- the task has been started
- permission has not been granted at the system level.

Insert Task
Pressing this button will allow you to insert an additional task onto the task list. The task is relevant to the current cursor position. A message will be displayed as to whether you wish to link the task before or after the current task.

You may not insert a new Task before a Started Task.

The task you wish to insert must be selected from the Task Type Pop Up form.

If you are inserting a Task where the currently selected task has not been started or completed then the following message will be displayed:

How would you like to link to the selected task. Before, After, Neither

Selecting Before

The Task Insertion Maintenance form will be presented with the previous tasks of the current task displayed. You may, if required, select that task to now be the previous task of the new task you are inserting. The way the new task is to be initiated is also available on this form. The default is User.

The Estimated Start Date/Time of the new Task is taken from the Estimated Completion Date/Time of the previous task.

Selecting After

The Task Insertion Maintenance form will be presented with the following task(s) of the current task displayed. You may, if required, select that task(s) to now be the following task(s) of the new task you are inserting. The way the new task is to be initiated is also available on this form. The default is User.

The Estimated Start Date/Time of the new Task is taken from the Estimated Completion Date/Time of the current task.

Selecting Neither

The Task will be inserted into the list in Estimated Start Date/Time order. The Estimated Start Date/Time of the new task is copied from the Estimated Start Date/Time of the task that had ‘focus’ when Insert Task was pressed. This also means that the task must be started manually by the user (the default “Initiated By” value is User) and on completion of the Task no other task will be automatically started.

If you are inserting a Task where the currently selected task has already been started then the following message will be displayed:

Do you want to link after the selected task or to nothing? After, Nothing

Selecting After

The Task Insertion Maintenance form will be presented with the following task(s) of the current task displayed. You may, if required, select that task(s) to now be the following task(s) of the new task you are inserting. The way the new task is to be initiated is also available on this form. The default is User.

The Estimated Start Date/Time of the new Task is taken from the Estimated Completion Date/Time of the current task.

Selecting Nothing

The Task will be inserted into the list in Estimated Start Date/Time order. The Estimated Start Date/Time of the new task is copied from the Estimated Start Date/Time of the task that had ‘focus’ when Insert Task was pressed. This also means that the task must be started manually by the user (the default “Initiated By” value is User) and on completion of the Task no other task will be automatically started.

When inserting a Task the Estimated Start and Completion Dates of remaining tasks will be recalculated.

A Task may not be Inserted if permission has not been granted at the system level.

Insert Procedure
Pressing this button will allow you to insert a group of tasks (via a Procedure) onto the task list. The tasks to be inserted are relevant to the current cursor position. A message will be displayed as to whether you wish to insert the tasks before or after the current task.

The procedure you wish to insert must be selected from the Procedure Pop Up form.

The form Previous/Next Task Maintenance will then be presented to enable the establishment of dependencies between tasks.

A Procedure may not be Inserted if permission has not been granted at the system level.

Repeat Task
Pressing this button will allow you to repeat the current task. The current task will be inserted into the list of tasks after the current task. If you wish to repeat the task later in the task list then you should choose Insert Task.

A task may not be Repeated if permission has not been granted at the system level.

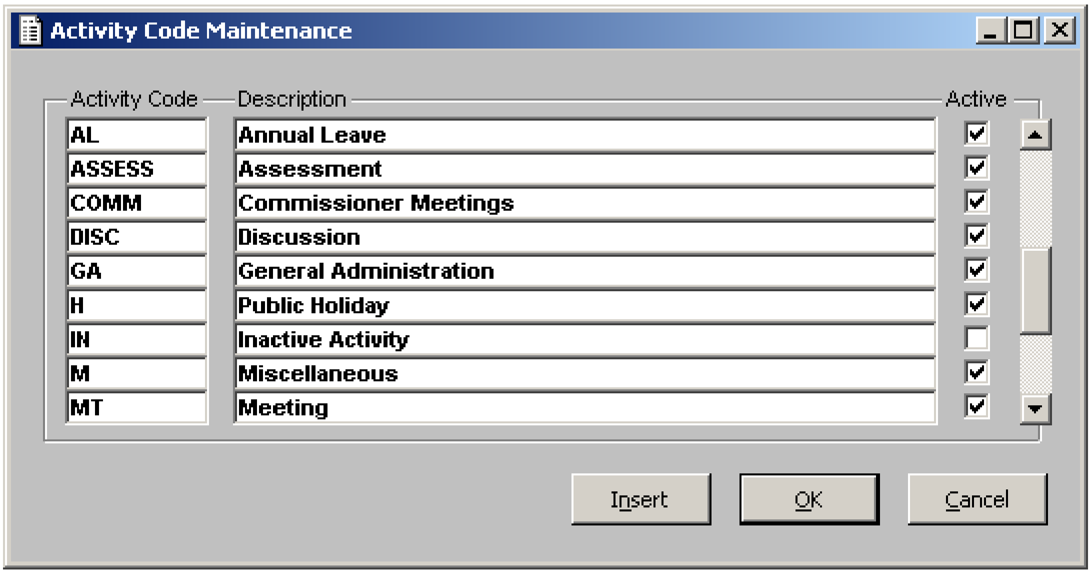
Suspend Task
The Suspend Task is an ‘Authority’ option and is only assigned to the required Users. Selecting this Option displays the Suspend Task Details Selection form showing any existing suspend records for the Task. Existing Suspend records can be modified or new suspend records added. The Suspend Task option can only be selected when the Task has been started.

Activity Code Maintenance

Activity Code Maintenance is used in Timesheet Entry. This Menu enables various Activity Codes and their Description to be defined for use within the whole Workflow function.

Activity Code Maintenance Form

This form is used to enter or maintain Activity details for linking to Timesheets. These codes are available across the whole system within Workflow Timesheet entry and maintenance.



Activity Code Maintenance Form

Activity Code
The Activity Code is entered or displayed in this field. A Code of up to 10 characters can be entered into the field.

Description
The Description of the Activity is displayed or entered in this field.

Active
If the Activity Code is allowed to be used within Timesheet entry then the Active flag should be set 'On'. Entry of a new Activity Code sets this flag to 'On' automatically.

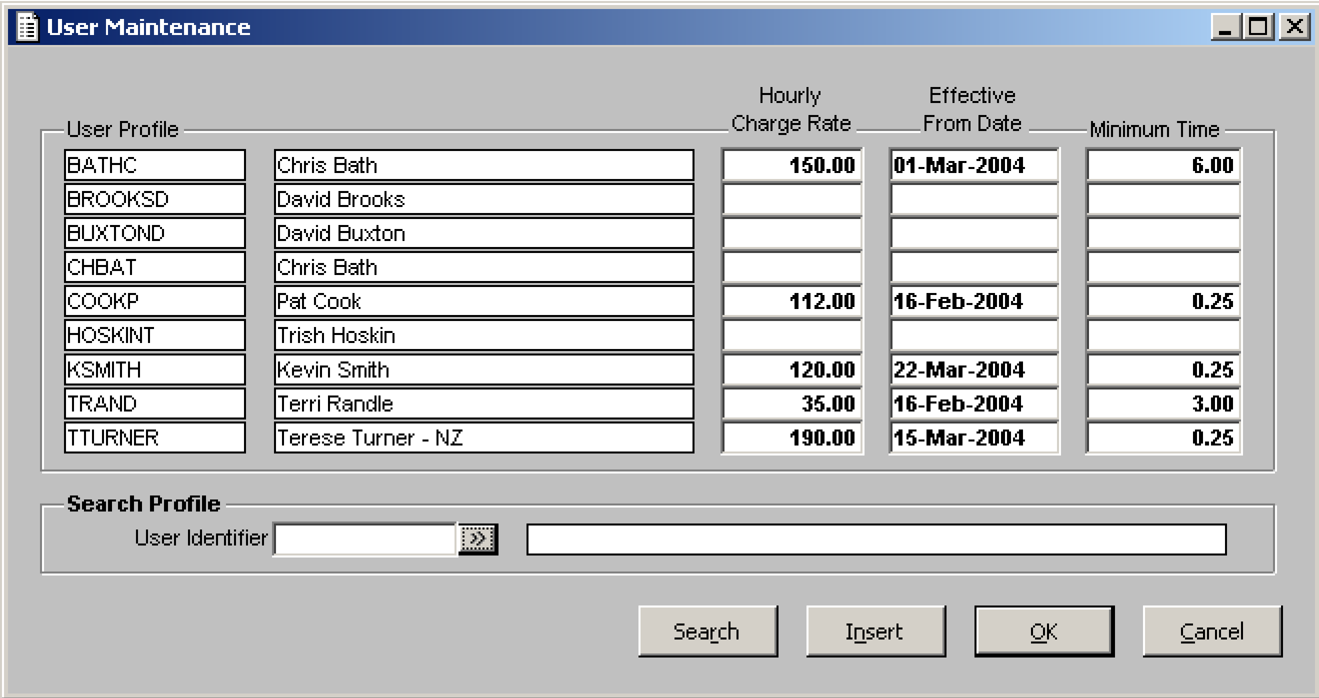
User Parameter Maintenance

Charging Details for Timesheet entry can be entered at a User Level. These details will apply system wide to Timesheets entered for that User unless the User Action has overriding Charging Details or there are Charging details for that User in the Structure/Group of the Task they are working on.

User Maintenance Form

This form is accessible via the Work Flow menu item.

These details will apply system wide to Timesheets entered for the User unless the User Action has overriding Charging Details or there are Charging details for the User in the Structure/Group of the Task they are working on that is requiring Timesheet entries.



User Maintenance Form

User Profile

Those User Profile records that have information recorded for Timesheet entry are shown in this field. The User Id and the Description of the User are shown. These fields are display only and cannot be maintained.

If new Users are to be added to the form then the Insert Option should be used. Users can then be multi-selected from the form to be inserted into the option.

Hourly Charge Rate

The Default Hourly Charge Rate is entered into this field for the User. This field is expressed in dollars and cents. i.e. 25.75.

Effective From Date

The Effective From Date is entered into this field. This is used to show the date that the Minimum and Hourly Charge Rates were defined for the User.

Minimum Time

The Default Minimum Time is entered into this field for the User. This field is expressed in decimals of an hour. i.e. 2.10 entered will represent 2 hours and 6 minutes. Or 2.25 will represent 2 hours and 15 minutes.

Search Profile – User Identifier

If a particular User is required to be displayed for maintenance then the User Identifier field can be used to enter in search information. Once the information has been nominated and the Search button selected the User will be displayed on the form and allow maintenance of the record.

This Search Profile is only for Users who have been entered into this form. It is not to locate Users who need to be added to the form.

If new Users are to be entered then the Insert Option should be used to display a list of Users who are not on the form. From the Pop Up form the Users can be multi-selected to be inserted into the form.

Timesheet Search / Enquiry Menus

There are four ways of accessing and maintaining Timesheet information.

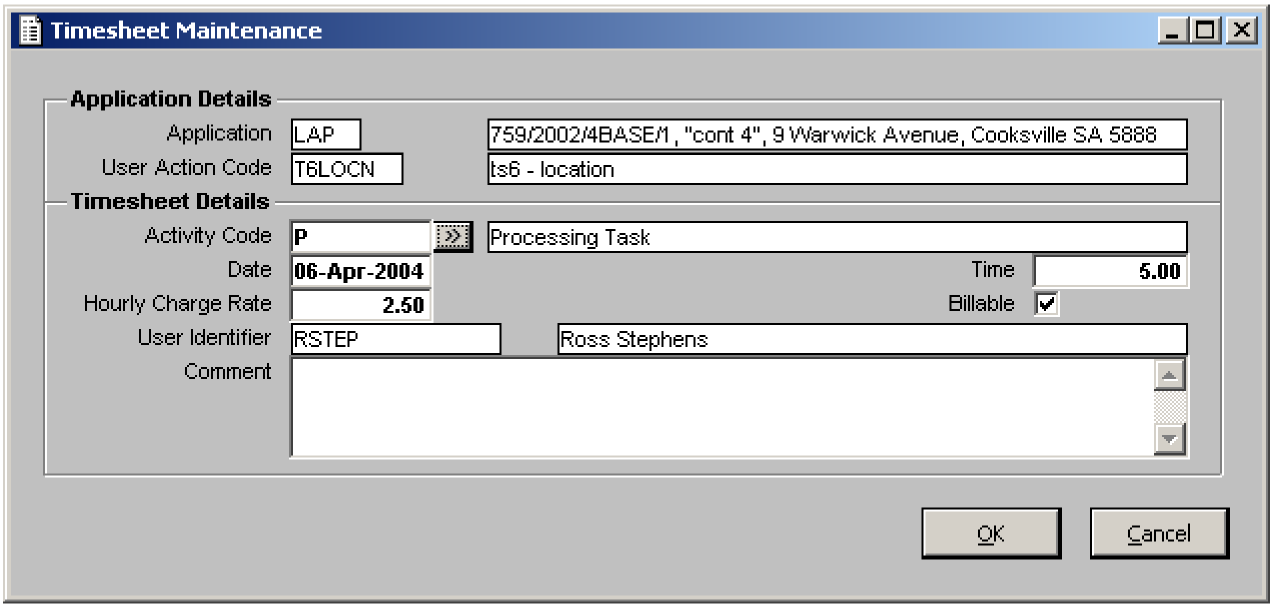
- Via the module and focusing on the Task and selecting Workflow / Timesheet from the Dropdown Option
- Via the Time Option Button within the Task Maintenance form
- Via the Timesheet Search Profile Menu within Workflow Module
- Via the Timesheet Enquiry Menu within Workflow Module

This section describes all forms within the Workflow Menus.

NOTE: When in the Timesheet Enquiry Menu the User is not able to change or update any information. This is for Enquiry purposes only, and therefore the information is in Display Mode.

Timesheet Maintenance Form

The Timesheet Maintenance Form accessed via the Workflow menus allows the maintenance of Timesheet Entries for all Timesheets and the entry of New General Type Timesheets. If the Task has been 'Completed' within the Module then the Timesheet Maintenance Form is in Display Mode only and no information can be updated or changed.



Timesheet Maintenance Form

Application Details - Application

These fields display the Module Code and Description which the Timesheet Entry has been entered for. These fields are display only.

When entering in a New General Timesheet entry these fields are blank. Where there is information displayed in these fields the Timesheet Entries have been entered via that Module and not through this menu.

Application Details – User Action Code

These fields display the User Action Code and Description which the Timesheet Entry has been entered against. These fields are display only.

When entering in a New General Timesheet entry these fields are blank. Where there is information displayed in these fields the Timesheet Entries have been entered via a Module and not through this menu.

Timesheet Details – Activity Code

In New Mode the Activity Code is blank. The Activity Code can be entered directly into the field or selected by using the Pop Up to display a list of valid Activity Codes. The Activity Code field is mandatory in New mode for a General Type Timesheet Entry.

When viewing an existing Timesheet Entry that has been entered via another Module the Activity Field may display Blank if it had not been entered at the time the Timesheet was keyed in. It is possible to accept changes to this record and leave the Activity Code field blank.

Where the Timesheet Entry has been entered against a User Action and the Task has been completed this field will be in display mode only and no changes will be able to be made to the Activity.

Timesheet Details – Date

Upon entering in a New Timesheet Entry the Date field is defaulted to Today's Date. This can be changed to another date if Today's date is not correct. The Calendar function is available for this field to select the required Date if the User is not sure of the correct entry.

When viewing an existing Timesheet Entry that has been entered via another Module the Date Field will display the Date entered at the time the Timesheet was keyed in. It is possible to change the Date if required.

Where the Timesheet Entry has been entered against a User Action and the Task has been completed this field will be in display mode only and no changes will be able to be made to the Date.

Timesheet Details - Time

In New Mode the Time field displays as Zeros. It is necessary for the User to enter in the Time as it will not accept Zeros.

When viewing an existing Timesheet Entry that has been entered via another Module the Time Field will display the Time entered at the time the Timesheet was keyed in. It is possible to change the Time if required.

Where the Timesheet Entry has been entered against a User Action and the Task has been completed this field will be in display mode only and no changes will be able to be made to the Time.

Timesheet Details – Hourly Charge Rate

In New Mode the Hourly Charge Rate field is not available for entry. The field is dimmed for General Type Timesheet Entries.

When viewing an existing Timesheet Entry that has been entered via another Module the Hourly Charge Rate Field will display the Rate entered at the time the Timesheet was keyed in. It is possible to change the Hourly Charge Rate if required.

Where the Timesheet Entry has been entered against a User Action and the Task has been completed this field will be in display mode only and no changes will be able to be made to the Hourly Charge Rate.

Timesheet Details - Billable

In New Mode the Billable field is not available for entry. The field is dimmed for General Type Timesheet Entries.

When viewing an existing Timesheet Entry that has been entered via another Module the Billable Field will display the setting entered at the time the Timesheet was keyed in. It is possible to change the Billable Flag if required.

Where the Timesheet Entry has been entered against a User Action and the Task has been completed this field will be in display mode only and no changes will be able to be made to the setting of the Billable field.

Timesheet Details – User Identifier

Upon entry into the Timesheet Entry form for a New Entry the User Identifier is defaulted to that of the User who is currently signed onto the system. The User Identifier can be changed to another User if the Timesheet Entry is not for the User signed on. If the User Identifier is not known then the Pop Up button can be used to display a list of value Users to select from.

When viewing an existing Timesheet Entry that has been entered via another Module the User Identifier Field will display the User entered at the time the Timesheet was keyed in. It is NOT possible to change the User Identifier.

Where the Timesheet Entry has been entered against a User Action and the Task has been completed this field will be in display mode only and no changes will be able to be made.

Timesheet Details - Comment

The Comment Area can be used to record information pertaining to the Timesheet Entry. This is helpful if there is a requirement to look at the Timesheet entry and evaluate the information recorded. This field is mandatory when in New Mode.

When viewing an existing Timesheet Entry that has been entered via another Module the Comment Field will display the information entered at the time the Timesheet was keyed in. It is possible to change this information if required.

Where the Timesheet Entry has been entered against a User Action and the Task has been completed this field will be in display mode only and no changes will be able to be made to the Comments.

Application/Licence Timesheet Entry

New timesheet entry functionality has been provided to allow quicker entry of timesheets for work performed on Applications and Licences.

NOTE: The new Timesheet Entry function will be available only to sites that have the required authority. Contact your Account Manager if your site requires this new functionality.

Timesheet Parameter Maintenence

This new parameter option (Workflow > Timesheet Entry > Timesheet Week) has been provided to allow the site to set how their Timesheet week is determined e.g. Monday to Sunday or Monday to Friday etc. This parameter will be used when displaying the relevant Timesheet Records in the new Timesheet Selection form.

User Parameter Maintenance

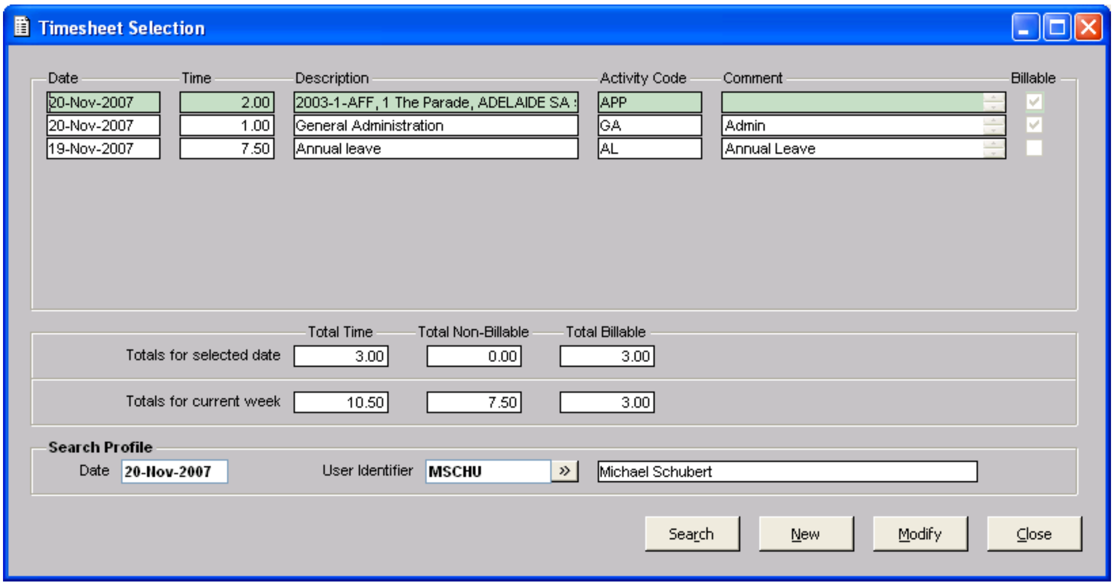
This existing parameter option (Workflow > User Parameter Maintenance) has been enhanced to allow each user to have their own a Default Activity set. When timesheet entries are being entered for a user in the new Timesheet Entry form their Default Activity will be automatically loaded into the entry.

Time Sheet Entry

This new function is accessed from the new Workflow > Timesheet Entry > Timesheet Entry option.

Timesheet Selection form

Selecting this option presents the Timesheet Selection form. This form will not show any timesheet entries initially; the User Identifier field will be automatically set to the user that is signed on.



Pressing the Search button will load the timesheets for the nominated user for the week pertaining to the nominated Search Profile date - if no date is nominated then the current date is used. The system will interpret this date based on the value entered in the Timesheet Week parameters and display the records for that week for that particular user. The latest entries will be displayed at the top of the form.

There are two ‘totals’ lines:-
1) Totals for selected date:
- This shows the total of the timesheet entries for the timesheet entry line that has focus.
- If there is a timesheet entry for the Search Profile date then the first entry for that date will get focus automatically upon pressing Search and thus show the total time for that date. If this is not the case then no entry line will get focus leaving the totals empty.

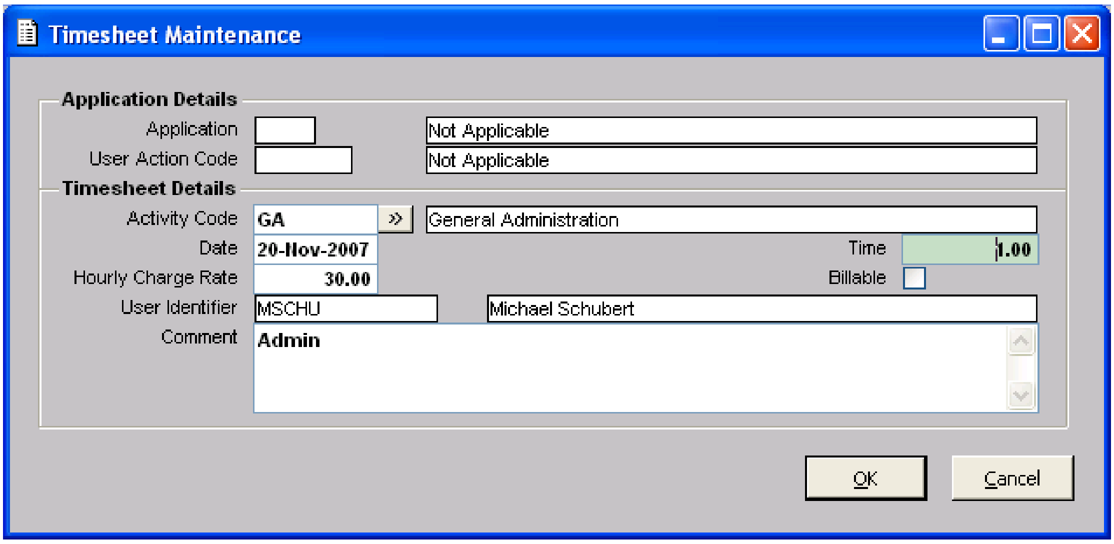
2) Totals for current week:
- This shows the total of the timesheet entries for the week as dictated by the nominated Search Profile date.

Note:-
If the nominated date is not within a Timesheet Week when Search is pressed, a message is shown on the message line and the entered date is highlighted. If there are no entries for the week then a message is shown in the message line.

Pressing the Modify button for an existing entry will show the standard Timesheet Maintenance form. Pressing the New button will present the new Timesheet Entry form.

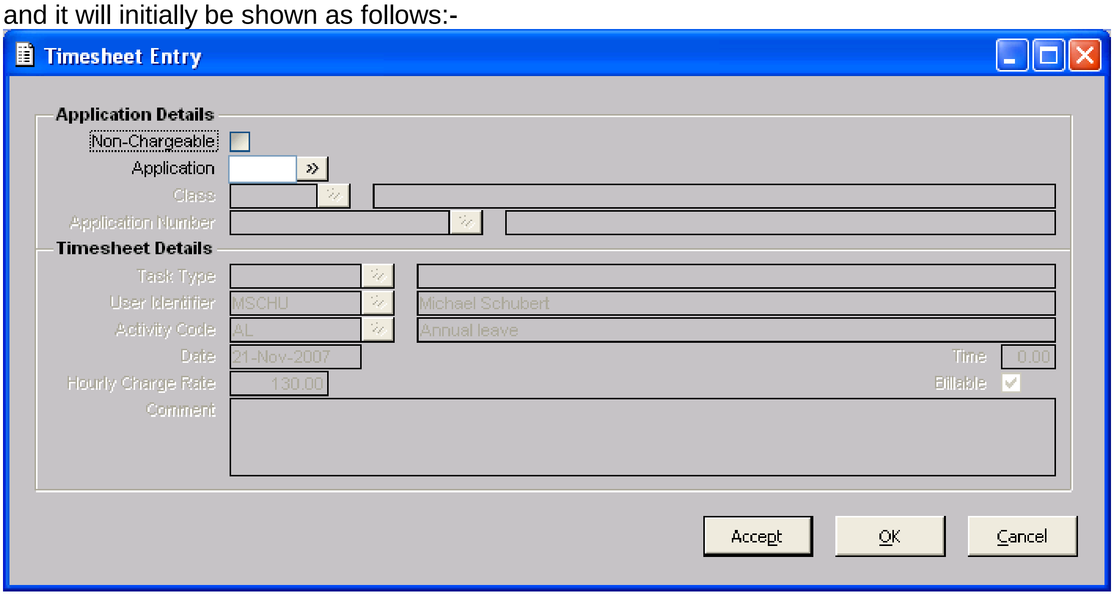
Timesheet Maintenance form

Pressing the Modify button on the Timesheet Selection form will show the standard Timesheet Maintenance form. Note: The Entry will not be able to be maintained if the Timesheet Entry is for a Task which is Completed.



Timesheet Entry form

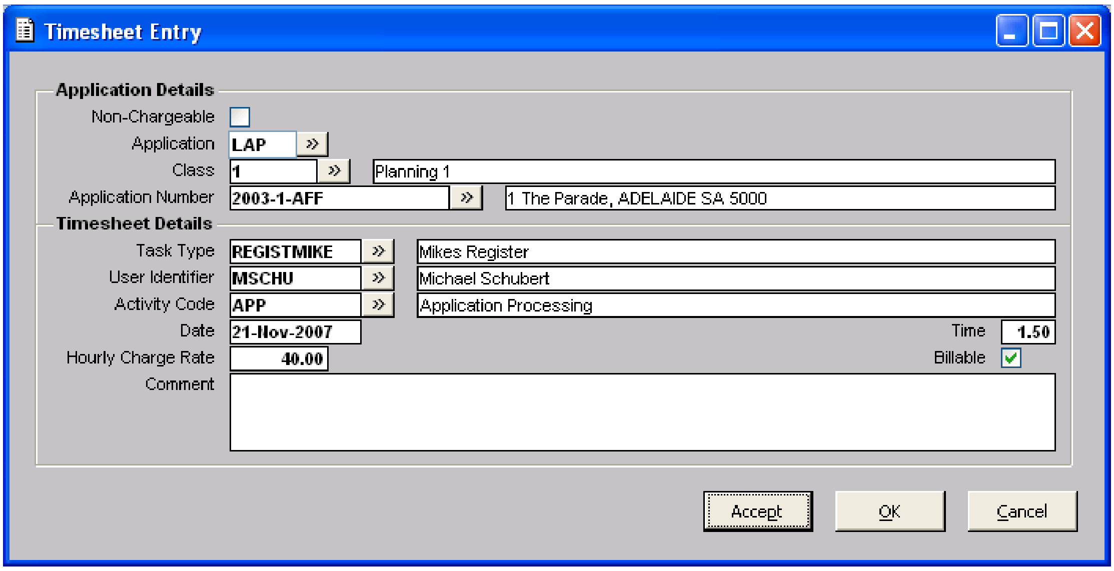
Pressing the New button on the Timesheet Selection form will present the new Timesheet Entry form, and it will initially be shown as follows:-



Timesheet entries can be entered for a specific Application/Licence or not as governed by the setting the Non-Chargeable checkbox – this also controls which fields are relevant for entry. By leaving the Non-Chargeable checkbox unchecked details can be entered for a specific Application/Licence. By checking it on ‘Non-Chargeable’ entries can be entered, in which case the cursor is automatically placed into the Activity Code field.

Entering details for a specific Application/Licence

The following will occur when entering details for a specific Application/Licence (i.e. the Non-Chargeable checkbox is unchecked). An entry with all the details entered looks as follows. Note that fields are only shown when previous fields have had details entered or chosen (e.g. the Application Number can not be entered until the Class has been nominated).



The Application can be chosen by entering ‘LAP’ or ‘LLC’ or by using the Popup/double clicking in the field. Once a valid code is present the Class field is made available.

The Class can be chosen by entering the Class code or by using the Popup. Only Classes the user is authorised to can be entered. Once a valid code is present the Application Number field is made available.

The Application Number can be chosen by entering certain details of the Application/Licence Number or by using the Popup. If the Application Number is to be entered directly into the field it is to be entered in the format of ‘Number/Year/Type’ (i.e. having ‘/‘ separators between each identifier). For example, to enter details for Application Number 1 enter ‘1’; to enter details for Application Number 1 and Year 2007 enter ‘1/2007’. Details can be entered with any number of the identifiers; e.g. details could be entered as ‘/2007/AT1’ which would cause the Application/Licence Selection form to be displayed showing all the Applications for the 2007 Year of the AT1 Type. If the entered details can be resolved to a specific Application the formatted Application Number is loaded into the field. Where there is more than one occurrence of the number such as would be the case with Staged or Amended numbers, the user would be presented with the Application/Licence Selection form to choose the correct record. Note: The formatted Application Number loaded to the form may be in different format to the ‘Number/Year/Type’ entry format as governed by the formatting parameters. Therefore if the Application Number chosen is to be changed the user must enter the new details in the ‘Number/Year/Type’ entry format.

The Task Type can be chosen by entering the code or by using the Popup. Only Tasks that have been defined in the parameters as a Timesheet Task can be entered / chosen. A Timesheet Task is denoted by the Task having any action associated to it that has ‘Time Recording’ ticked on.

When leaving the Task Type field the form checks the status of that Task on the nominated Application/Licence. The following scenarios can occur:-

1) The Task is not found on the Application or it is found but it is Completed.

In this case the user is asked if they wish to create a new occurrence of that Task.

Answering ‘Yes’ will attempt to create an entry of that Task against the Application/Licence and start the Task which will cause the existing Timesheet Maintenance form to be presented allowing Timesheet details to be entered. Once the task actions have been completed the new Timesheet Entry form is redisplayed with the Application and Class retained and the Application Number etc. cleared for the next entry.

If the user does not have authority to Insert Tasks then an error message will be shown and the timesheet entry can not be proceeded with.

The Task that was created will be positioned within the existing set of Tasks for the Application/Licence according to the Class's Workflow 'Task Sequence' parameter. If this parameter is set to 'As Entered' then the new task will be created as the first Task of the Application/Licence so that it is shown at the top of the of the list of workflow Tasks.

Answering 'No' will not create an entry of that Task, and will clear out the Application Number and Task and position the cursor in the Application Number field.

2) The Task is on the Application and is Started but not Completed.

In this case the timesheet entry can be entered in the bottom half of the form. See further details in the next section that describes the functionality available in the bottom half of the form.

If the Task has multiple Actions which have Time Recording checked On then the timesheet will be linked to the first Action of the Task as per existing functionality. In this instance the 'Additional User Actions may also require Timesheets. Access these Actions through Task Maintenance' warning message will be shown per existing functionality.

3) The Task is on the Application but is not Started.

In this case the Task will be started allowing timesheets to be entered as part of that task. Once completed the new Timesheet Entry form is redisplayed with the Application and Class retained and the Application Number etc. cleared for the next entry.

Entering details in the bottom half of the form.

Details are entered in this part of the form when:-
1. Timesheet entries are not being entered for a specific Application/Licence or,
2. Timesheet entries are being entered an Application/Licence and the nominated Task is already started but not yet completed.

The User Identifier is defaulted to the User nominated on the Timesheet Selection form. The user can then be changed on the Timesheet Entry form and will be retained until the Timesheet Entry form is exited. Based upon the User selected the form will load the Default Activity and Hourly Charge Rate as set in the User Parameter Maintenance. Where no default Activity has been set the field will be left blank with the ability to key directly into the field or selected.

An Activity must be entered when a timesheet is not being entered for a specific Application/Licence. If details are being entered for a specific Application/Licence then an Activity must be entered if the Class has the Mandatory Activity parameter checked on (this parameter is within the Application/Licence Parameters menu option - in the Workflow > Work Flow Application Maintenance parameter).

The Date field defaults to the current date but can be changed. If a date is changed it will remain until the user returns to the menu or changes it to a different date. This allows users to continuously key a number of timesheets for any given date without having to continually change the date. If a date is entered that does not fall within the defined Timesheet Week then a warning message is issued when the Accept or OK buttons are pressed, allowing the user to accept the entry or to correct it.

Hourly Charge Rate is set to zero if Non-Chargeable is checked on, and reset to the default rate for the nominated User if Non-Chargeable is checked off.

The Billable flag is defaulted checked off if Non-Chargeable is checked on, and checked on if Non-Chargeable is checked off. If it is changed to be off for a Chargeable entry the Hourly Charge Rate is set to zero.

A Comment must be entered when a timesheet is not being entered for a specific Application/Licence. If details are being entered for a specific Application/Licence then a Comment must be entered if the Class has the Mandatory Comment parameter checked on (this parameter is within the

Application/Licence Parameters menu option - in the Workflow > Work Flow Application Maintenance parameter).

Other

Once details have been entered they can be accepted by pressing the Accept button, the F6 button or the OK button as follows:-

- Pressing the Accept button or F6 button will validate the entry and if correct store the details, then show the 'Timesheet Entry added' message and refresh the form for the next entry. In the case where an entry was made for a specific Application/Licence some of the entered details will be retained for the next entry (e.g. the Class, Application Number, Task Type, etc.). The Activity Code and the Hourly Charge Rate will be refreshed to the defaults for the User. The Time, Billable and Comment fields will be reset ready for the next entry. Retained details can be changed for the next entry or the Non-Chargeable field can be used to change the entry mode thus causing certain fields to be cleared.
  Note: The Task Type is retained in certain circumstances, but is cleared when the Class is changed as the actual Task Type for one Class is difference to a Task Type for another Class even though the two Tasks may have the same code.
- Pressing the OK button will validate the entry and if correct store the details and return to the Timesheet Selection form.

To allow quicker entry, tabbing from one field to the next has been enabled so that the tab button only needs to be pressed once to move to the next input field. This is useful for those fields which have a Popup button – for example, when a Class code has been entered into the Class field the tab button only has to be pressed once for the cursor to be placed into the Application Number field.

Update Unstarted Tasks and Actions

Where the Update Unstarted Tasks flag has been set ON for Task Types then this menu is used to update the Unstarted Tasks. Tasks that have been started will not be affected by this process.

Task and Action Update Control Form

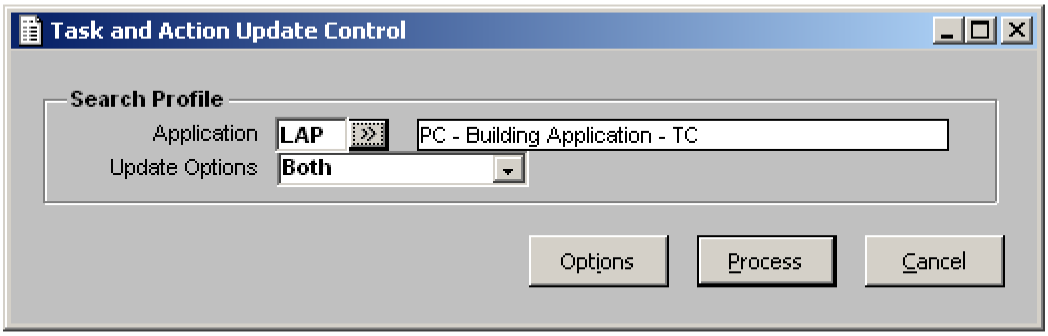
The Task and Action Update option allows users to update all Unstarted Task with the changed parameter details.

Upon entry to this menu the User needs to select the required Module that the associated Workflow Tasks are to be updated.

The Modules available for selection are:-

- Applications
- Licensing
- Customer Service
- Bookings

Once the module has been selected, an additional option is displayed showing the Classes associated to the module and allowing the selection of the required Class.



Task and Action Update Control Form

Application

The Application field is used to select the Module and the Class that is to be updated by changes flagged on the Tasks Types.

Update Options

The Update Options is used to determine what is to be updated from the changes on the Task Types. The options available from the dropdown are:-

- Tasks
- Actions
- Both

Where ‘Tasks’ is chosen, only those Tasks that have the Flag Checked ON within the parameters for that module and class will have the changes applied to Unstarted Tasks.

Where ‘Actions’ is chosen, only those Tasks that have the Flag Checked ON within the parameters for that module and class will have User Actions reassigned for Unstarted Tasks.

Where ‘Both’ is chosen, Tasks that have the flag checked ON within the parameters for that module and class will have the User Actions reassigned and the Task changes updated on unstarted Tasks.

Timesheet Details – Activity Code

In New Mode the Activity Code is blank. The Activity Code can be entered directly into the field or selected by using the Pop Up to display a list of valid Activity Codes. The Activity Code field is mandatory in New mode for a General Type Timesheet Entry.

When viewing an existing Timesheet Entry that has been entered via another Module the Activity Field may display Blank if it had not been entered at the time the Timesheet was keyed in. It is possible to accept changes to this record and leave the Activity Code field blank.

Where the Timesheet Entry has been entered against a User Action and the Task has been completed this field will be in display mode only and no changes will be able to be made to the Activity.

Timesheet Details – Date

Upon entering in a New Timesheet Entry the Date field is defaulted to Today's Date. This can be changed to another date if Today's date is not correct. The Calendar function is available for this field to select the required Date if the User is not sure of the correct entry.

When viewing an existing Timesheet Entry that has been entered via another Module the Date Field will display the Date entered at the time the Timesheet was keyed in. It is possible to change the Date if required.

Where the Timesheet Entry has been entered against a User Action and the Task has been completed this field will be in display mode only and no changes will be able to be made to the Date.

Timesheet Details - Time

In New Mode the Time field displays as Zeros. It is necessary for the User to enter in the Time as it will not accept Zeros.

When viewing an existing Timesheet Entry that has been entered via another Module the Time Field will display the Time entered at the time the Timesheet was keyed in. It is possible to change the Time if required.

Where the Timesheet Entry has been entered against a User Action and the Task has been completed this field will be in display mode only and no changes will be able to be made to the Time.

Timesheet Details – Hourly Charge Rate

In New Mode the Hourly Charge Rate field is not available for entry. The field is dimmed for General Type Timesheet Entries.

Reporting

The following topic is covered in this section:

Work Flow Reports

Work Flow Reports

This chapter describes the various reports available for the Work Flow module.

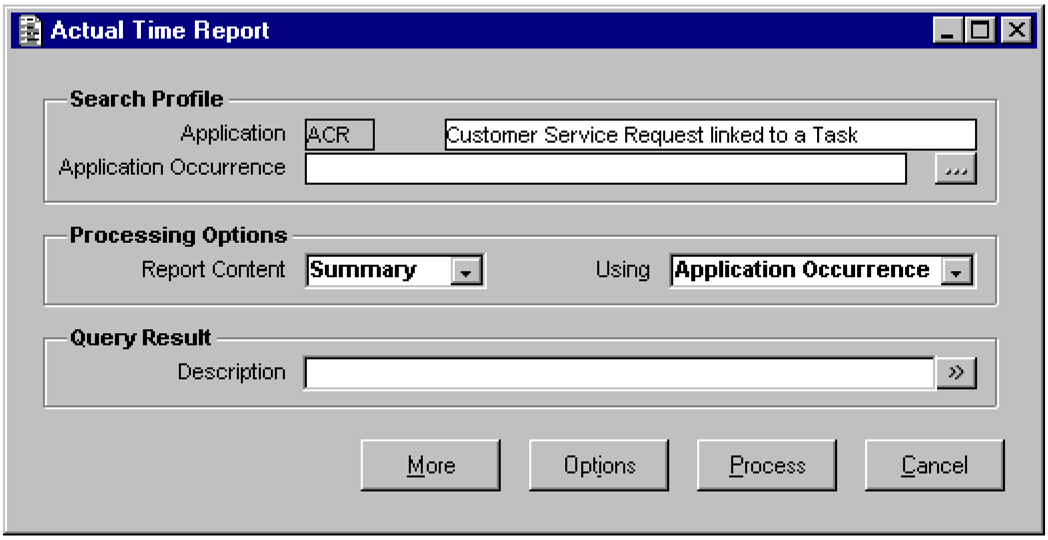
Actual Time Report Form

This report will provide details of all tasks against selected application occurrences with totals for the actual time taken for each task. Total Elapsed Time and Total Actual Times are given for each application occurrence as well as a grand total at the end of the report.

This report may be run from the Work Flow Reports menu or from the Customer Request – Reports menu.

If run from Customer request reports then the Application code will automatically be filled in by the system.

Any requests where the confidentiality flag is set on and you are not authorised to the requests will not be printed.



Actual Time Report Control Form

Application

This field contains the application for which the Actual Time Report is to be run. E.g. Customer Service. If the report is started from the Customer Service Report menu then this field is populated automatically by the system and is non-maintainable.

Application Occurrence

This field contains the application record description for which the report will be produced.

This field is only required if the report is to be run over a single application record. E.g. a specific request number.

Press the Detail button associated with this field to select the required record. The Search Profile for the appropriate application will be presented.

The Processing Option “Using” must be set to Application Occurrence to use this field.

Report Content

The listing produced may be in one of two formats:-

Detailed

The report will contain full details of the tasks selected.

- Task Type
- Record Actual Time
- Mail External Contact Flag
- External Contact Name
- Mail all Users in Group Flag
- Charge Status
- Include in Approval Time Flag
- Include in Total Actual Time Spent Flag
- Details
- Structure Name
- Application Code
- Group Name
- Responsible Officer
- Actual, Estimated and Original Estimated Dates
- Duration Format
- Calendar Format

Summary

The report will contain a summary of each task selected.

- Task Type
- Actual Start Date
- Actual Completion Date
- Actual Duration

Total Elapsed Time and Total Actual Times are given for each application occurrence as well as a grand total at the end of the report.

Using
This field determines whether the report is to be run over a single occurrence or over a selection range.

Application Occurrence

By selecting Application Occurrence the report may be restricted to a single record (and its tasks). This field is used in conjunction with the Application Occurrence field described earlier.

External Search Profile

The report may be run over a selection of records e.g. all Barking Dogs customer requests. The MORE button at the bottom of the form is used in conjunction with this setting.

Query Result
The report may be run over the records that are selected as part of a Query Result set. For more information please refer to the Query User Guide.

The Query must be designed over the CWFTASK entity.

More Button
This button is used in conjunction with the Processing Options “Using” field. The “Using” field must be set to External Search Profile.

Pressing this button will present the appropriate applications' Search Profile form. E.g. Customer Request Search Profile. A profile is entered and all records matching the profile will be included on the report.

Application Tasks Report Form

This report provides a list of all tasks against one or many application records.

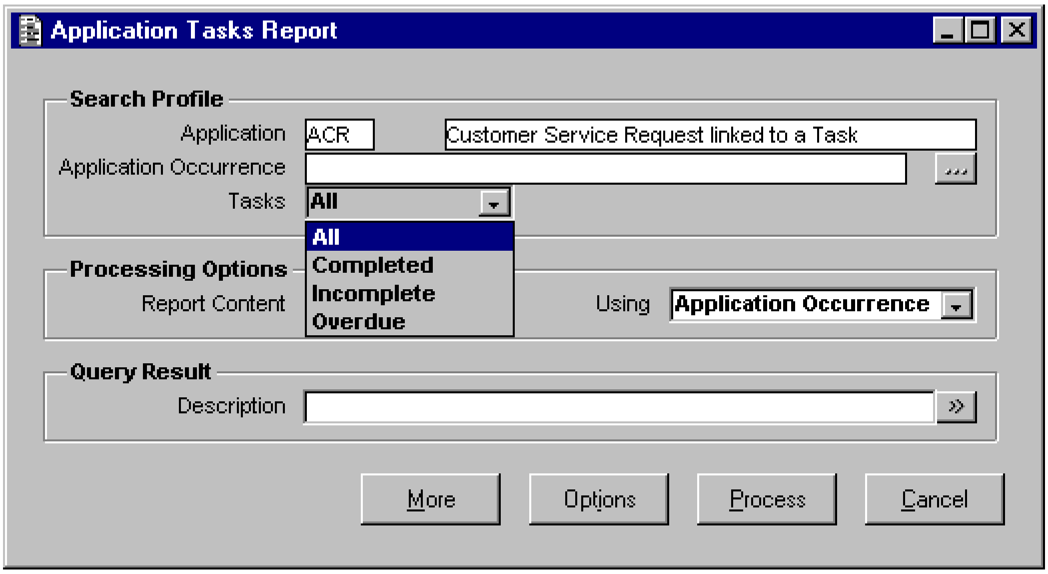
The report will allow you to select tasks that match one of the nominated criteria:-

- Overdue Tasks
- All Tasks
- Completed Tasks
- Incomplete Tasks
- Suspend Tasks

This report may be run from the Work Flow Reports menu or from the Customer Request – Reports menu.

If run from Customer request reports then the Application code will automatically be filled in by the system.

Any requests where the confidentiality flag is set on and you are not authorised to the requests will not be printed.



Application Tasks Report Control Form

Application

This field contains the module for which the Application Tasks Report is to be run. E.g. Customer Service. If the report is started from the Customer Service Report menu then this field is populated automatically by the system and is non-maintainable.

Application Occurrence

This field contains the application record description for which the report will be produced.

This field is only required if the report is to be run over a single application record. E.g. a specific request number.

Press the Detail button associated with this field to select the required record. The Search Profile for the appropriate application will be presented.

The Processing Option “Using” must be set to Application Occurrence to use this field.

Tasks
This field allows you to select tasks to be printed on the report based on the status of the task.

Completed

Only tasks that are completed will be included on the report.

Incomplete

Only tasks that have been started but not completed will be included on the report.

All

The report will include all tasks regardless of the status.

Overdue

The report will only include tasks that are overdue e.g. the task has not been started and the estimated start date has gone by, or tasks that have been started but not completed by the estimated completion date.

Suspend

The report will only include tasks that are suspended e.g. the task has been started and an Suspend record has been assigned to the Task which is still in effect.

Overdue Date
This field is displayed if the option to print overdue tasks is selected.

The date entered in this field drives the selection criteria for overdue tasks. It will be defaulted with today’s date however this may be changed.

Example
If the date in the field is today’s date then the following tasks will be deemed to be overdue.
All tasks that have not been started and the estimated start date of the task is less than the date entered.
All tasks that have been started but not completed and the estimated completion date of the task is less than the date entered.

Report Content
The listing produced may be in one of two formats:-

Detailed

The report will contain full details of the tasks selected.

- Task Type
- Record Actual Time Flag
- Application Occurrence
- Mail External Contact Flag
- Mail all Users in Group Flag
- Task External Contact
- Include in Approval Time Flag
- Charge Status

- Include in Total Actual Time Spent Flag
- Details
- Structure
- Application Code
- Group
- Responsible Officer
- Actual, Estimated and Original Estimated Dates
- Duration
- Duration Format
- Calendar Format

Summary

The report will contain a summary of each task selected.

- Task Type
- Actual Start Date
- Actual Completion Date
- Actual Duration

Using
This field determines whether the report is to be run over a single occurrence or over a selection range.

Application Occurrence

By selecting Application Occurrence the report may be restricted to a single record (and its tasks). This field is used in conjunction with the Application Occurrence field described earlier.

External Search Profile

The report may be run over a selection of records e.g. all Barking Dogs customer requests. The MORE button at the bottom of the form is used in conjunction with this setting.

Query Result
The report may be run over the records that are selected as part of a Query Result set. For more information please refer to the Query User Guide.

The Query must be designed over the CWFTASK entity.

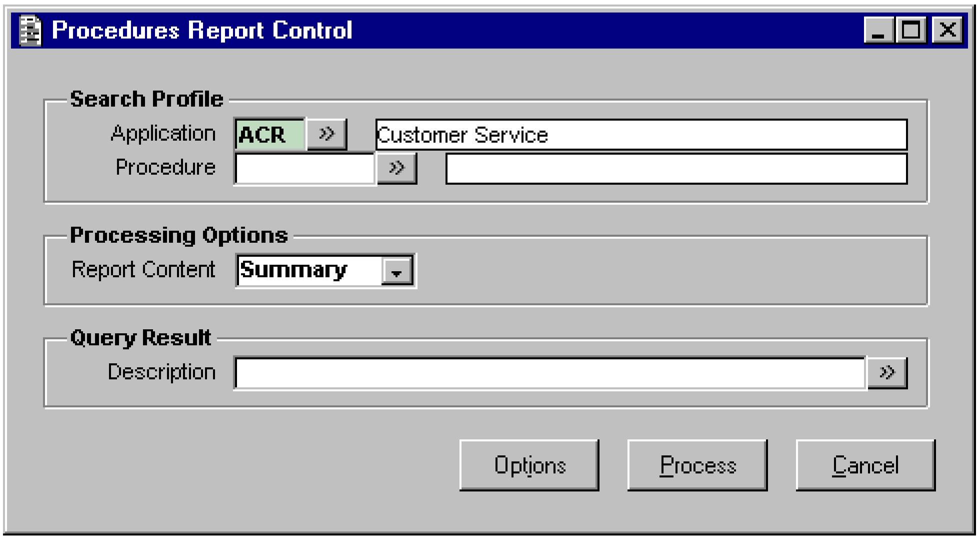
More Button
This button is used in conjunction with the Processing Options "Using" field. The "Using" field must be set to External Search Profile.

Pressing this button will present the appropriate applications' Search Profile form. E.g. Customer Request Search Profile. A profile is entered and all records matching the profile will be included on the report.

Procedures Report Control Form

This report provides details of the tasks selected as part of a Procedure and is designed to assist in the set up of the Work Flow parameters.

The report is accessed via the Work Flow – Reports menu option.



Procedures Report Control Form

Application

This field contains the name of the application for which you are running the Procedure report.

Enter a valid application code or alternatively press the pop up button associated with the field to select from the pop up list.

This field is mandatory.

Procedure

This field allows you to nominate a specific Procedure over which to run the report.

Enter a valid Procedure code or alternatively press the pop up button associated with the field to select from the pop up list.

If the report is required over all Procedures within the application then leave this field blank.

Report Content

The listing produced may be in one of two formats:-

Detailed

The report will contain full details of the tasks contained within each Procedure.

- Task Type
- Active Flag
- Application
- Record Actual Time Flag
- External Contact Name
- Mail External Contact Flag
- Charge Status
- Mail all Users in Group Flag
- Estimated Duration
- Include in Approval Time Flag
- Calendar Format
- Include in Total Actual Time Spent Flag
- Mail Text
- Structure
- Application
- Group
- Officer

- User Action
- Action Type
- System Defined Action
- Action Hint

Summary

The report will contain a summary of fields for the tasks contained within each Procedure (i.e. The Action Details will be omitted).

Query Result Description

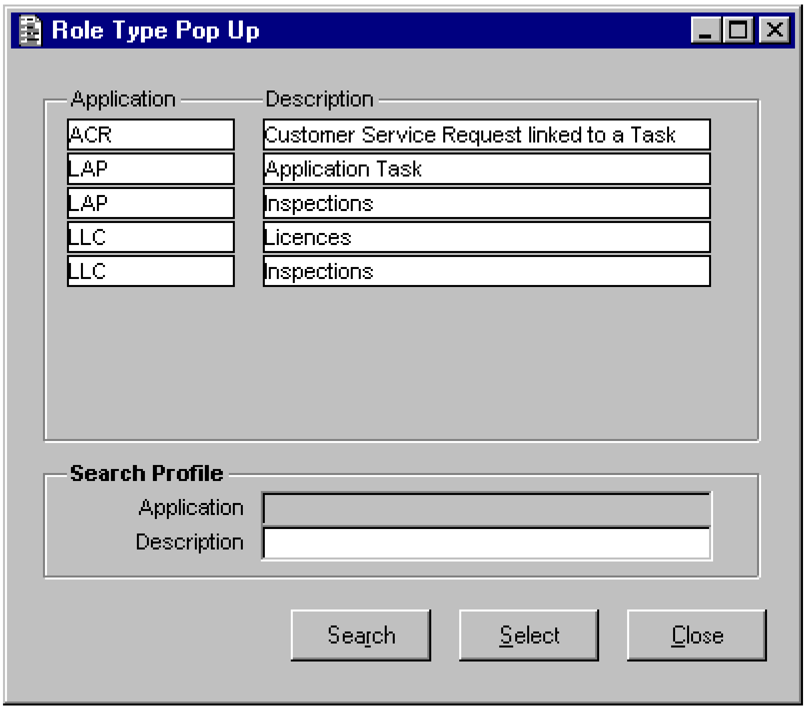
The report may be run over the records that are selected as part of a Query Result set. For more information please refer to the Query User Guide.

> The Query must be designed over the CWFPROC entity

Role Type Pop Up Form

This form is a standard pop up form. It displays all valid application work flow links. (At Release 2.04 Work Flow is only applicable to Customer Service Requests.)

Wild Card searching is available on this form via the Search Profile.



Role Type Pop Up Form

Application

This field displays the application code applicable.
This field is display only and may not be maintained.

Description

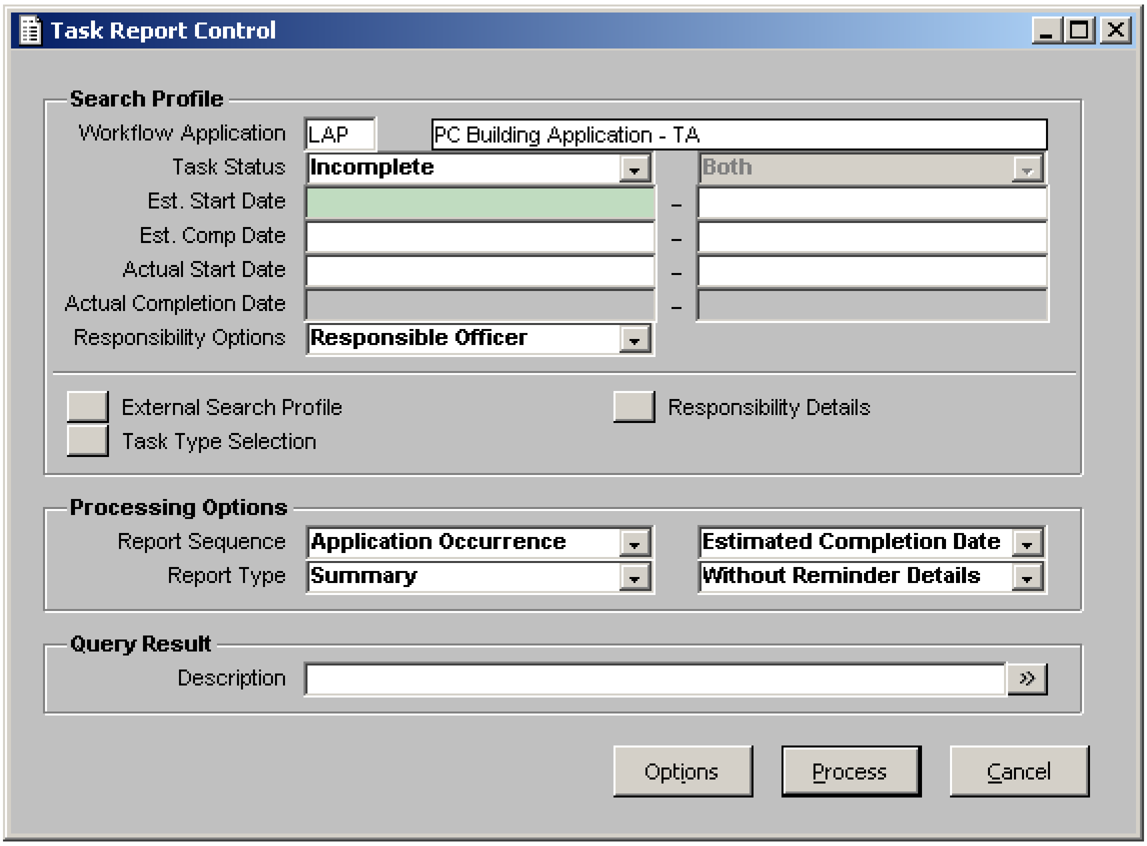
This field displays the full description of the application role link.
This field is display only and may not be maintained.

Search Profile

Search criteria may be entered into the search profile. Full wild card searching is available.

Task Report Control Form

The Task Report allows Tasks to be printed for a Structure, a Group within a Structure or an Officer. The ability to determine which Tasks are reported on is provided by Task Type Selection, while the ability to filter external application information is provided by the External Search Profile.



Task Report Control Form

Workflow Application

This field allows selection of an application over which to run the report. If an application is not selected then the selection of Task Types will not be available. If the report is executed from within an application then the application will already be set and Task Types will be available for selection.

Task Status

This field provides the ability to nominate the status of Tasks to extract for the report. The options available are:

- All – All tasks will be reported, regardless of the status on the task.
- Complete – The task is completed, i.e. an Actual Completion Date has been recorded.
- Current – Tasks that are ready to be started will be reported. This means that all tasks have not been started and have all previous dependencies completed.
- Incomplete – Tasks that have been started but not completed will be included.
- Overdue – Tasks which are not completed and have an Estimated Completion Date that is less than the current date, or date selected. When a status of Overdue is selected then a further option will be provided to allow the user to specify to report on all overdue tasks that are started, all overdue tasks that are not started or both.
- Pending – Tasks that are not started and not current will be included. E.g.: Tasks that are due to be started but have previous tasks, which are not yet completed.
- Suspend – Tasks that are Suspended are reported on.

When the report is run for “All”, “Incomplete” or “Pending” tasks, the message “ ** Overdue **” is printed next to any overdue tasks.

Est. Start Date

These fields allow an Estimated Start Date range to be entered on which to base the report.

Est. Completion Date

These fields allow an Estimated Completion Date range to be entered on which to base the report.

Actual Start Date

These fields allow an Actual Start Date range to be entered on which to base the report. These fields will be dimmed when the Task Status is set to 'Current' or 'Pending'.

Actual Completion Date

These fields allow an Actual Completion Date range to be entered on which to base the report. These fields will be dimmed when the Task Status is set to 'Current', 'Pending', 'Incomplete' or 'Overdue'..

Responsibility Options

This field allows a Responsibility Option to be selected from the dropdown. The available options are:

- None
- Responsible Officer
- Structure/Group
- Structure/Officer

It provides the ability to select none or many Responsibility Groups to report over. Note that the selection of Responsibility Groups is only available once a structure has been selected.

The selection of Officers and Groups are independent, e.g. if a structure is selected then the user will have the option of selecting Groups or Officers to report over, not both.

If no Groups or Officers are selected, then all Groups and all Officers will be reported on.

External Search Profile

Depending upon which application is interfacing with Workflow, selection of this button will display an application specific enquiry form to be used as a search profile option over application fields. This will allow a further filter over the report.

Upon entry to the Task Report Control form, if System or User Default options have been saved that include an External Search Profile, the text next to this button will be highlighted to indicate that the report is being filtered through this selection.

Task Type Selection

Selection of this button displays the Task Type Selection Maintenance form. It provides the ability to select Task Types within an application. An application must be selected for this button to become available.

Upon entry to the Task Report Control form, if System or User Default options have been saved that include Task Type selections, the text next to this button will be highlighted to indicate that the report is being filtered through this selection.

Responsibility Details

Selection of the Responsibility Details button displays one of three Selection Maintenance forms:

- Responsible Officer Selection Maintenance form
- Structure/Group Selection Maintenance form
- Structure/Officer Selection Maintenance form

It provides the ability to select none or many Responsible Officers to report over. This allows a user to execute a report to list all the tasks that they are allocated. If a Responsible Officer is selected to report on then the ability to select a Responsibility Structure to report on is not available. The selection of Responsibility Structure, Groups and Officers is mutually exclusive to the selection of Responsibility Officers.

Processing Options - Report Sequence

The Task Report provides three sort options, as follows:

- Application Occurrence
- Responsible Officer
- Structure, Group, Officer

Each sort option provides the data printed in a different format. Each report format provides a Summary and Detailed option. Users have the option of specifying whether the report is run in ascending Estimated Start Date or ascending Estimated Completion Date order. The default is Estimated Completion Date order.

e.g. Sort by Application Occurrence, Estimated Completion Date will sort both fields in ascending order and will print the following fields on the report:

- Application Occurrence Description
- Task Description
- Estimated Completion Date
- Estimated Start Date
- Actual Start Date
- Actual Completion Date
- Responsible Officer

Processing Options - Report Type

This field allows selection of a Summary or Detailed Report. The detailed report for each option will print all the Task details, i.e. all the Task properties as well as the actions that are against the Tasks.

For both *Detailed* and *Summary* Reports, a drop-down field allows users to specify whether the report will be printed *With Reminder Details* or *Without Reminder Details*. If reminder details are included, the last reminder date/time and total number of reminders will be printed for each Task.

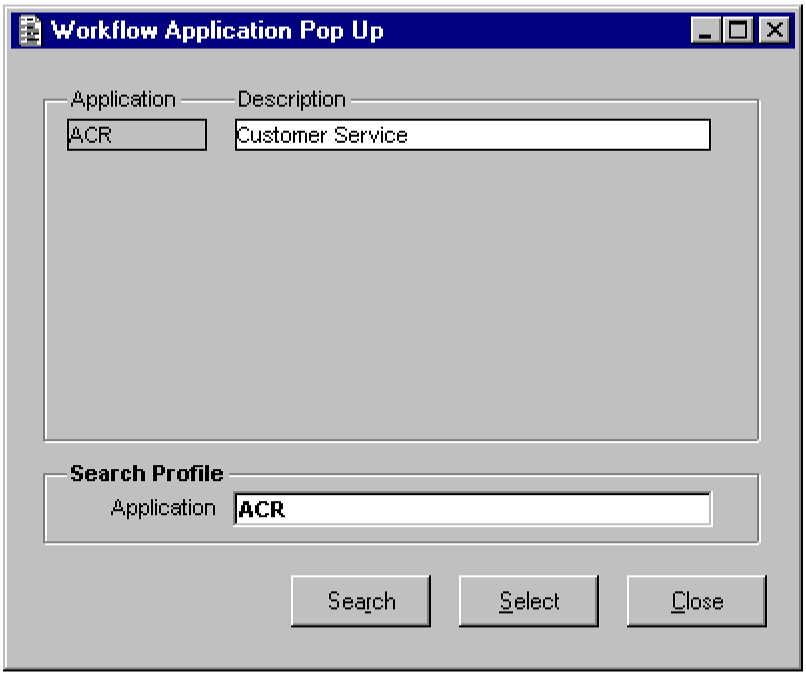
Note: The Task Reminders function is available only to sites that have the required authority. Contact your account manager if your site requires this functionality.

Query Result - Description

If a query result is used then none of the search options listed on the Workflow Task Control Form will be used. No Search Profile Parameters will be printed on the header page of the report, even if they are specified.

The Query Result is used in place of the Search Profile selected options not in conjunction with them. The Description field allows the user to enter the name of the Query if known, or use the Pop Up Button to select from a list of pre-defined Queries based on the application.

Workflow Application Pop Up Form



Workflow Application Pop Up Form

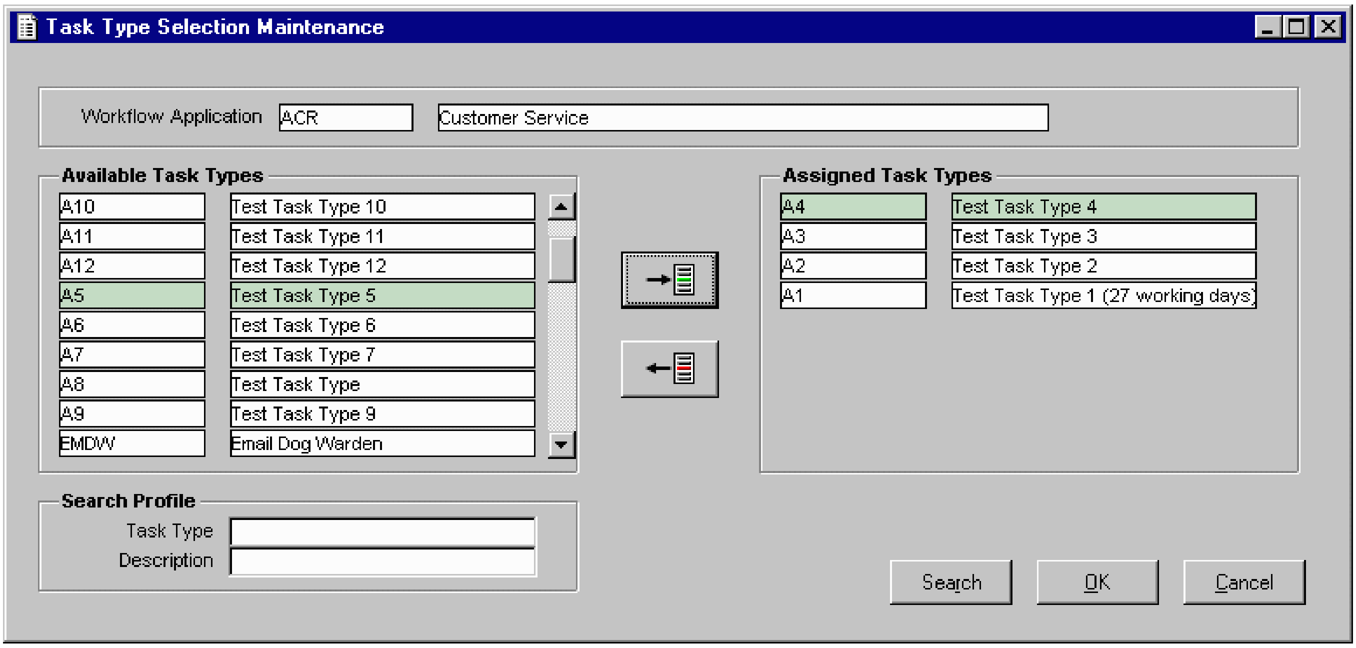
Application

These fields display the applications available for selection.

Search Profile - Application

Enter an Application Code on which to search and press the Select button to initiate the search. This function is useful when there are more than 9 applications available for selection.

Task Type Selection Maintenance Form



Task Type Selection Maintenance Form

Workflow Application

This field displays the application which has been selected. These fields are display only and cannot be maintained.

Available Task Types

These fields display the Task Types which are available for filtering the Task Report. Highlight a Task Type and click the Select button to move the Task Type to the right side of the form. To de-select a Task Type, highlight the Task Type on the right side of the form and click the Remove button.

Assigned Task Types

These fields display the Task Types which have been assigned for inclusion in the filtering process in the Task Report. To de-select a Task Type, highlight the Task Type and click the Remove button.

Search Profile - Task Type

Enter a Task Type and/or Description on which to search and press the Select button to initiate the search. This function is useful when there are more than 9 Task Types available for selection.

Trouble Shooting

The following topic is covered in this section:

Frequently Asked Questions

Frequently Asked Questions

E-mails are not being sent

The system is designed to automatically send e-mails when a Task is ready to be started by officer.

E-mails are sent when the following criteria are satisfied.

- The task is linked as a following task.
- The following task has a Responsible Officer nominated, or alternatively the “Mail all Users in Group” flag is checked on.

E-mails are not being sent.	The User Id has an invalid e-mail address. Go to System Administration -> Menu -> User Maintenance. Find the User in the list and verify the e-mail address.
	The Task is not linked as a following task.
	The Group assigned to the Task does not have any Responsible Officers in it.

If the “Mail All Users in Group” flag is checked on then an e-mail message will be sent to all Users within that Group regardless of the fact that a single officer may have been nominated as the Responsible Officer.

How do I change or allocate the Responsible Officer?

Work Flow authorised functions govern whether or not a User may assign a specific Officer to a Task.

To assign an officer you must have the Authorised Function “Allocate Officer”. (Work Flow Parameters -> Work Flow Application Maintenance -> Assign Group Task Authority Options)

Where a Responsible Officer has been nominated against a Task then generally speaking only that officer may start and complete that Task.

The exception to this rule is where an Officer that is “higher” in the structure than the nominated officer wishes to start the task. That officer may start the task and will then be written as the Responsible Officer on that task.

Why am I made the Responsible Officer for a Task?

It should be noted that if you are using **Auto started linked tasks** and the first task has a responsible officer that is at the top of the responsibility structure then as each task is auto started that officer will automatically become the responsible officer for that task.

To stop this happening make the tasks User initiated. When the first task is completed an e-mail message will be sent to the officer (or the Group) on the following task.

The system will automatically assign the user that started the Task as the Responsible Officer.

I am authorised to Allocate an Officer however the Task Maintenance form is presented in Enquiry Mode.

The Responsibility Structure plays an important role in determining “who” has “access” to “what”.

A Task will be presented in Enquiry Mode when you are not authorised to that task. This is determined by the Responsibility Structure.

The following examples illustrate under what conditions a task may be maintained. Specifically refer to Example 3 to resolve the issue mentioned above. The Responsibility Structure is established as follows:-

CEO Group John

- **MANAGR Group**
  - Betty
  - David
  - **INSP Group**
    - Alan
    - Ken
- **ADMIN Group**
  - Sharon
  - Peter

Example 1

The MANAGR Group has been assigned and Betty has been nominated as the Responsible Officer to a Task.

If Betty tries to modify the task it will be maintainable and the authorised functions will then determine what Betty is allowed to do.
If David tries to modify the task it will be called in display mode.
If Alan tries to modify the task it will be called in display mode.
If Ken tries to modify the task it will be called in display mode.
If John tries to modify the task it will be maintainable and the authorised functions will then determine what John is allowed to do.

Example 2

The MANAGR Group is assigned to a Task. No Responsible Officer has been nominated.

If Betty tries to modify the task it will be maintainable and the authorised functions will establish what she is allowed to do. On maintaining the Task the Responsible Officer field will be automatically updated with Betty.

If David tries to modify the task it will be maintainable and the authorised functions will establish what he is allowed to do. On maintaining the Task the Responsible Officer field will be automatically updated with David.

If John tries to modify the task it will be maintainable and the authorised functions will establish what he is allowed to do. On maintaining the Task, if no Responsible Officer has been assigned then an error message will be displayed. The system will not automatically assign a Responsible Officer, as John is not contained within the MANAGR Group which is assigned to the Task.

If Ken tries to modify the task it will be called in display mode.

If Alan tries to modify the task it will be called in display mode.

Example 3

The INSP Group has been assigned and Alan has been nominated as the Responsible Officer to a Task.

Sharon has been asked to change the Responsible Officer on the Task from Alan to David. Sharon has the appropriate Authorised functions available.

When Sharon accesses the Task to reallocate the officer the Task is called in Enquiry Mode.

The assumption is that because the INSP Group is lower in the structure then Sharon should automatically have access however the following should be noted.

Sharon is in the ADMIN Group but has been nominated as having "**Restricted**" access. This means that Sharon would only gain maintenance access to Tasks belonging to any Group that is immediately below the ADMIN Group. In the example above there are **no** subordinate groups to the ADMIN Group. For Sharon to gain maintenance access to the Task she will need to be granted "**Limited**" access within the Responsibility Structure. This will give her access to Tasks that have nominated Groups / Officers across all levels below the ADMIN level.

What is the difference between the Original Estimated Start Date and the Estimated Start Date on a Task?

When Tasks are initially loaded onto a record the estimated dates are calculated for each Task based on the current system date, the duration on the Task and whether or not Tasks have been linked to follow on from previous tasks.

At this point in time the Original Estimated Start Date and the Estimated Start Dates will be the same.

If a Task is inserted into the Task list at some point in the future the Estimated Start Dates of all following Tasks will be "moved out" further along the time line. The Original Estimated Start Date will always remain the same.

As Tasks are completed the Estimated Start Dates of following Tasks will be re-calculated based on the completion date/time of the current task, the duration on the following Tasks and whether or not they have been linked.

The Original Estimates are provided to enable Council to gain a benchmark of how the tasks are progressing based on the original estimate. In addition, a customer may have been given the Estimated Completion Date of a Task (such as an Approval Date) however due to circumstances that date has been shifted out.

My Tasks do not get loaded in the same order in which they were originally set up.

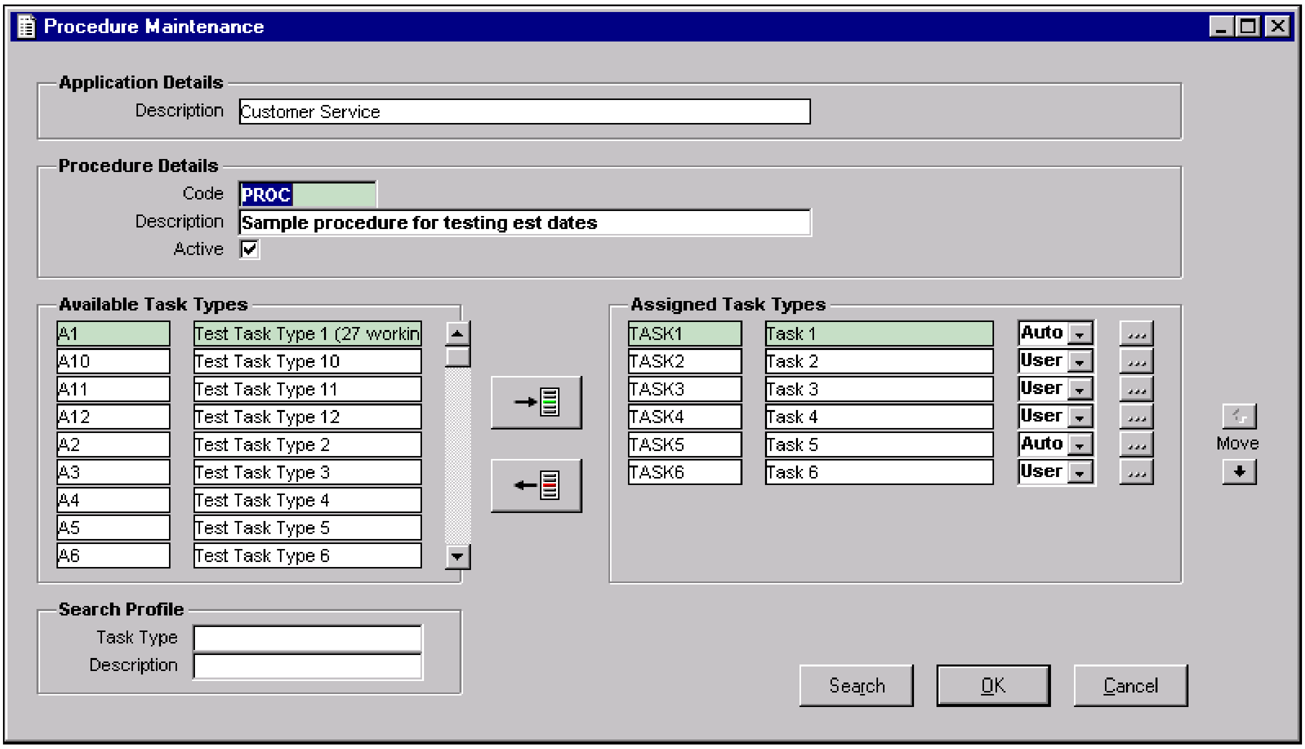
Task sequence is controlled at the parameter level by selecting a preferred Task sequencing option, in the Workflow Application Maintenance Form, from one of the following options

- As Entered
- Actual Start Date
- Estimated Start Date

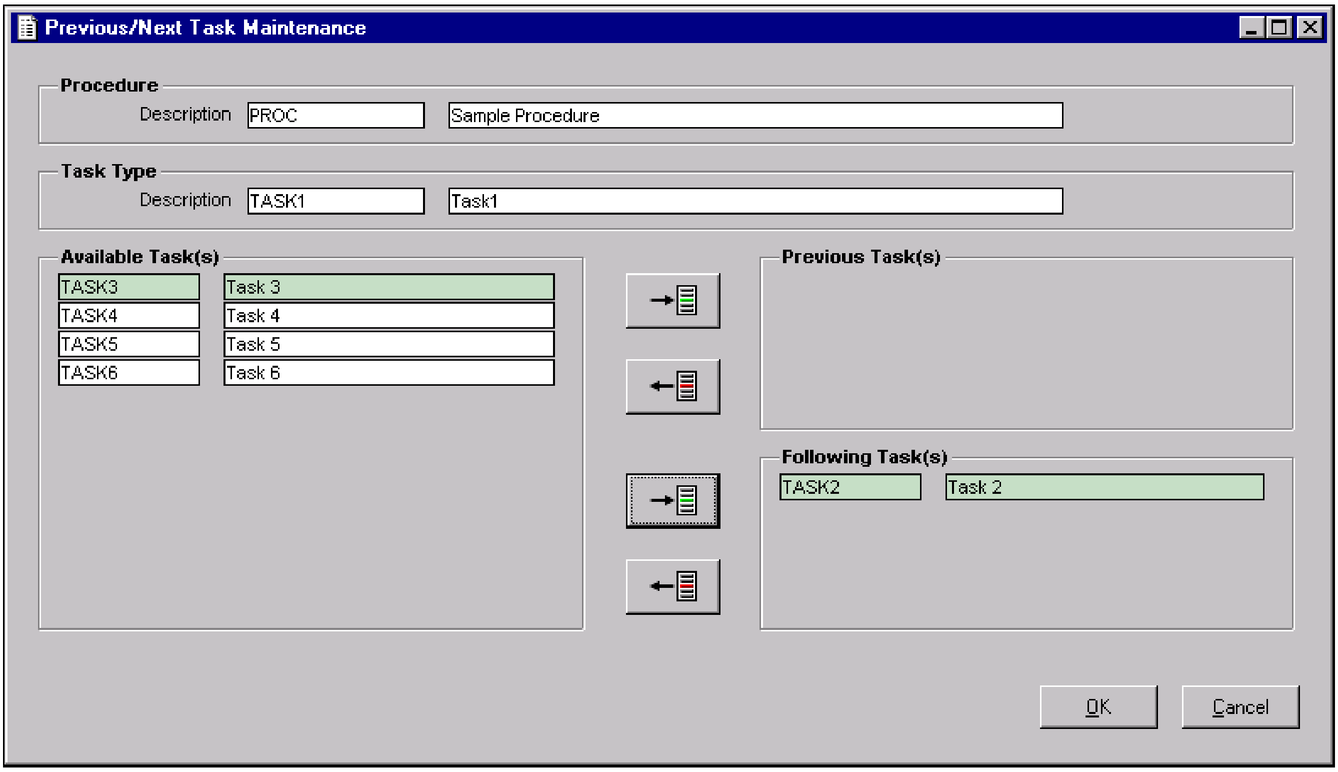
(Refer to section on Task Sequencing (17))
Setting the preferred Task Sequence (at the parameter level) to 'Actual Start Date' may result in Workflow Tasks being automatically re-sequenced whenever Tasks are started or completed.
A number of factors can influence the order of Tasks once a procedure is loaded. Basically, the order is based on the calculation of Estimated Start and Completion Dates/Times.
The following Procedure has been set up to demonstrate the calculation process of Estimated Start and Completion Dates/Times of Tasks.
The following Tasks were set up and included in the order displayed in the PROC procedure below.

Task Type	Description	Duration	Initiated by
TASK1	Task 1	1 working day	Auto
TASK2	Task 2	2 working days	User
TASK3	Task 3	3 calendar days	User
TASK4	Task 4	1 month (working days)	User
TASK5	Task 5	4 working days	Auto
TASK6	Task 6	5 working days	User

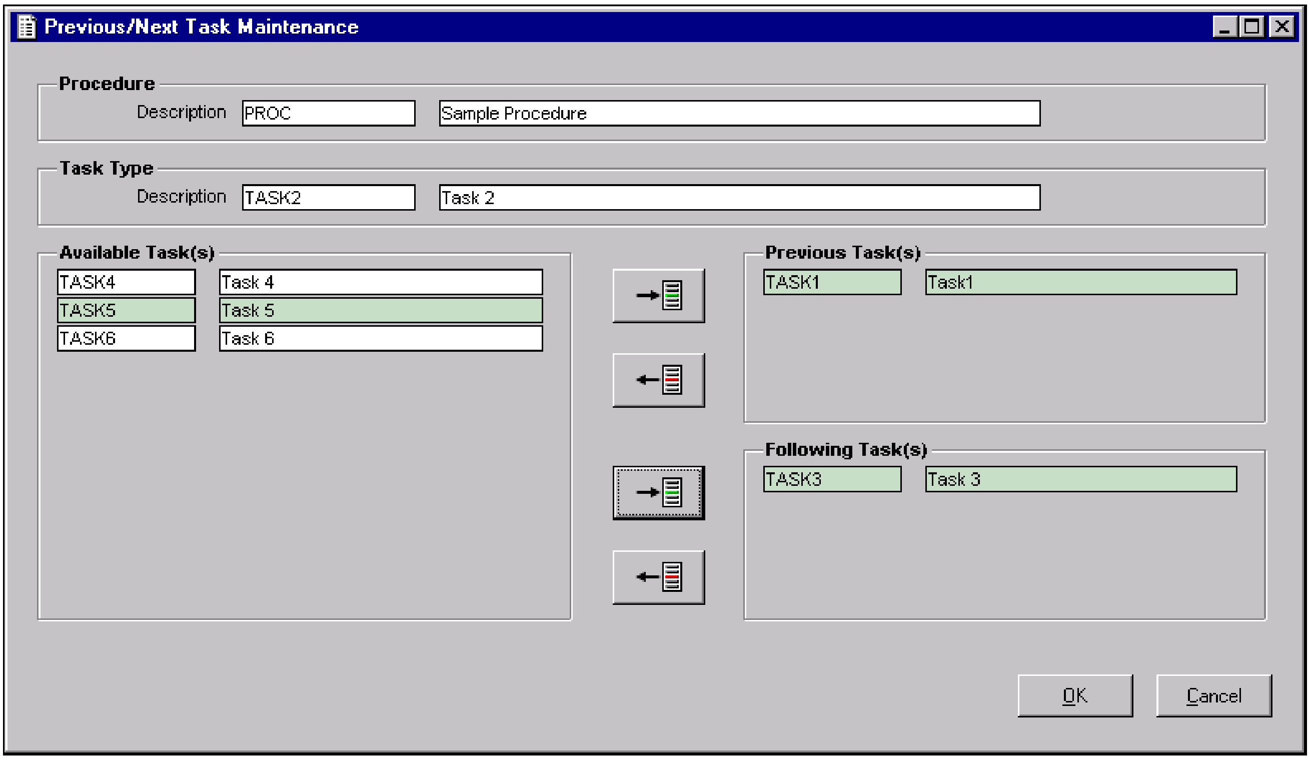
TASK1 and TASK5 are Auto started, while the others must be started by the User.



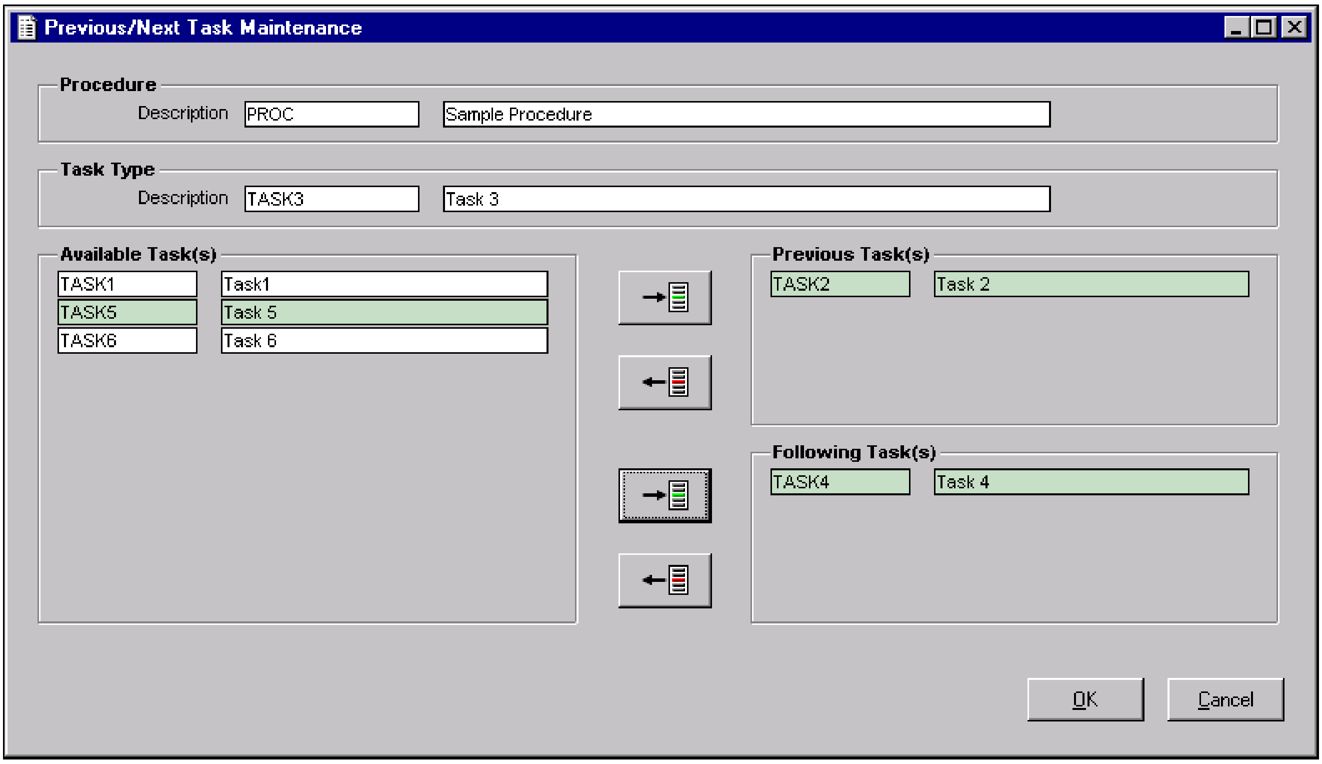
The following screens show the Previous/Next Task Status of each Task. TASK1 will be started automatically when the tasks are first loaded.



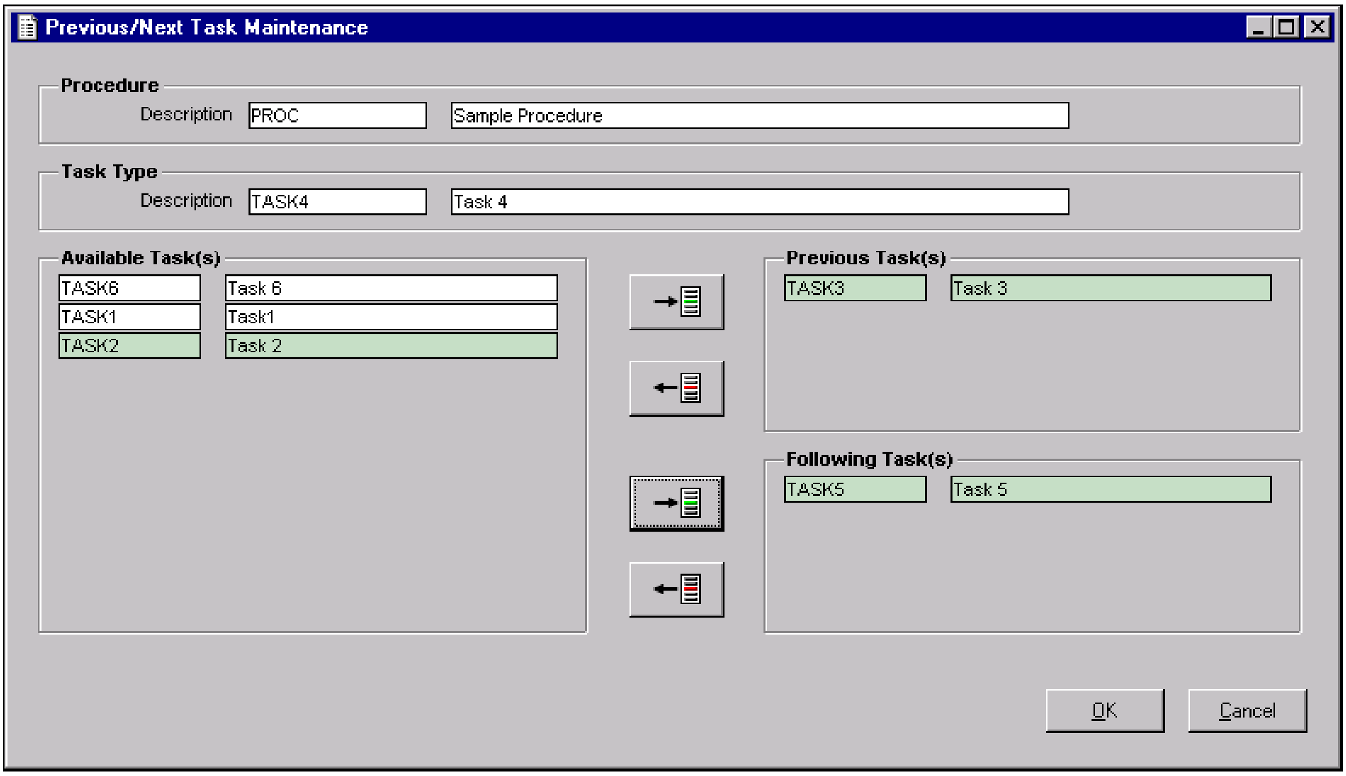
TASK2 can only be started once TASK1 has been completed. It has a following task of TASK3.



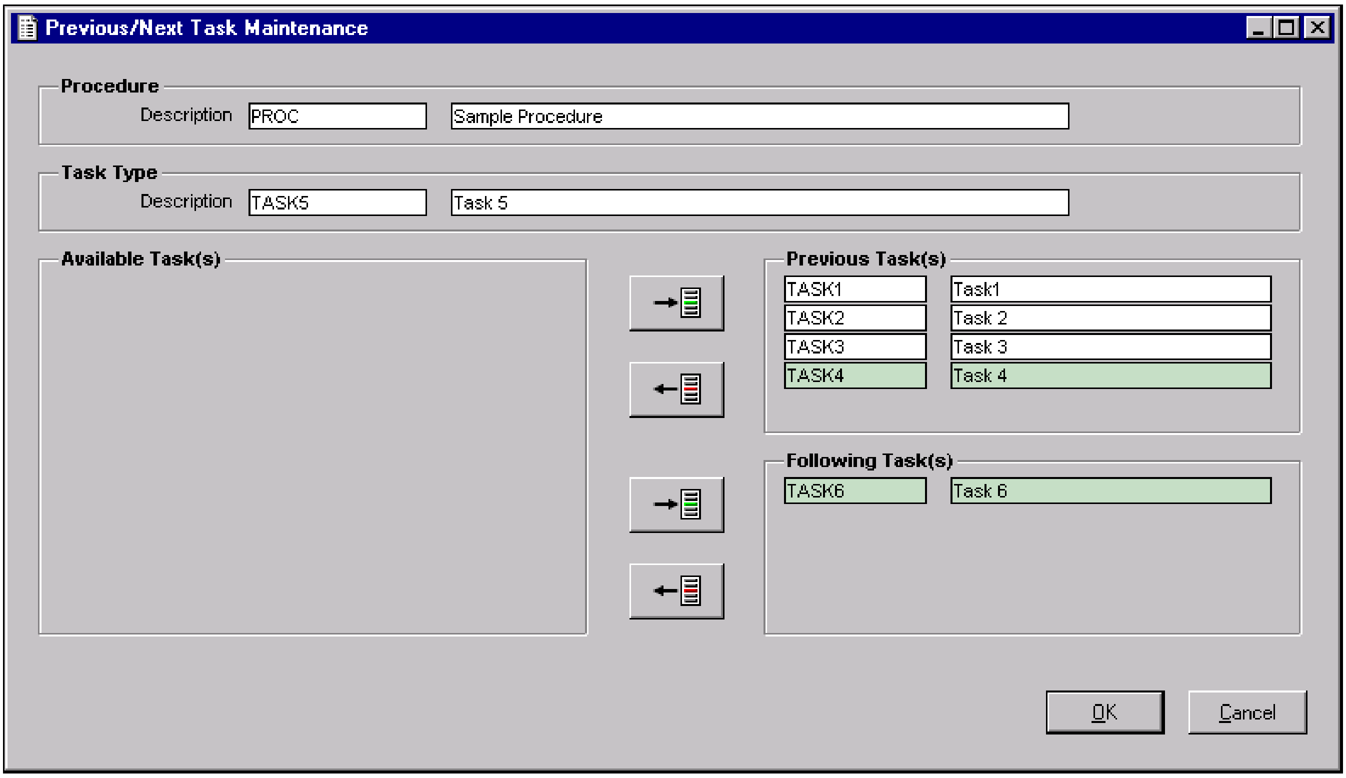
TASK3 can only be started after TASK 2 has been completed. It has the following task of TASK4.



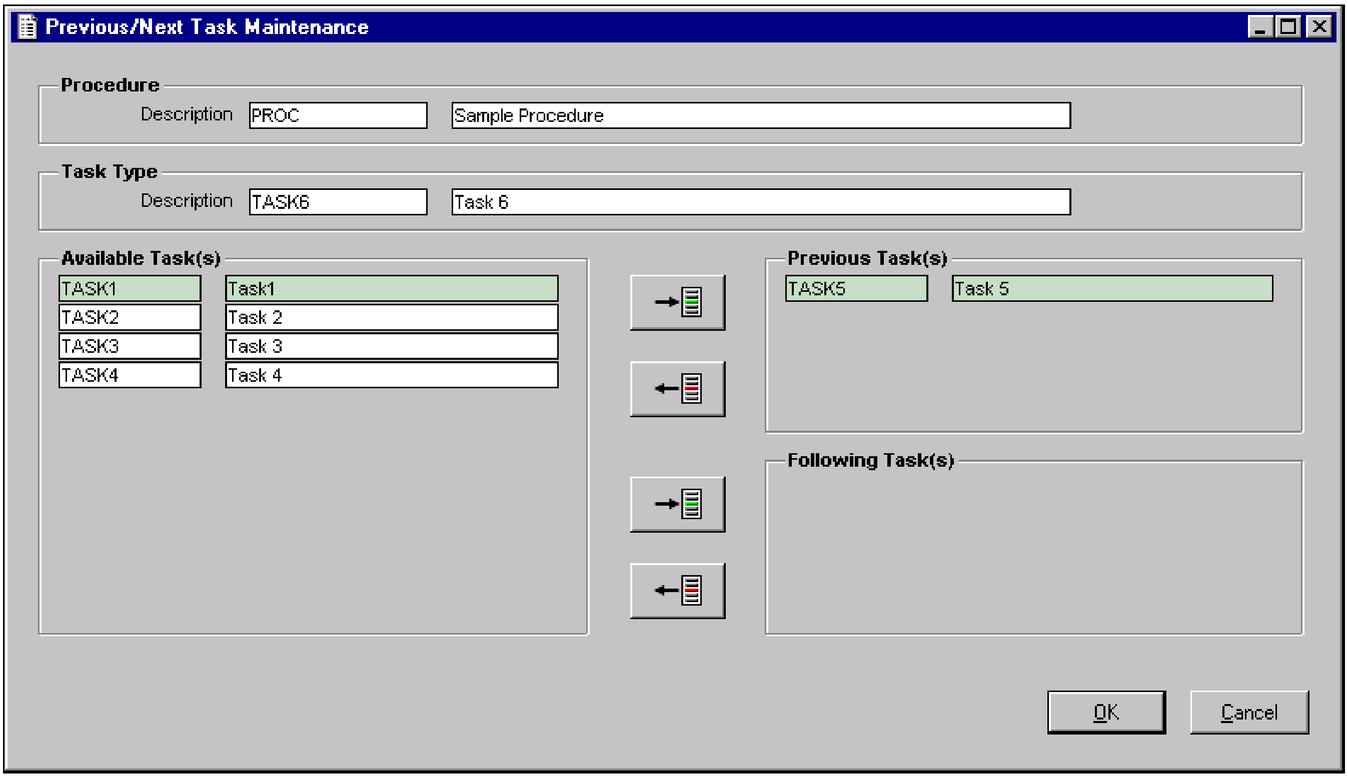
TASK4 can only be started after TASK3 has been completed. It has the following task of TASK5.



TASK5 is an automatically starting task which will fire off after TASKs 1 to 4 have been completed. It has a following task of TASK6.



TASK6 must wait for TASK5 to be completed before it can be started.



STEP 1

When the Tasks are loaded, the Estimated Start and Completion Dates are calculated based on the Duration and the Previous/Following Tasks.

TASK	DURATION	EST START DATE	EST COMPLETION DATE
TASK1	1 working day	12 July 14.02	13 July 14.02
TASK2	2 working days	13 July 14.02	17 July 14.02

TASK3	3 Calendar days	17 July 14.02	20 July 14.02
TASK4	1 month	20 July 14.02	21 Aug 14.02
TASK5	4 working days	21 Aug 14.02	25 Aug 14.02
TASK6	5 working days	25 Aug 14.02	1 Sep 14.02

Note: If TASK5 had no previous tasks which were required to be completed, then its Estimated Start Date/Time would be the same as TASK1 (as it is an automatically started task).

STEP 2

TASK1 is automatically started when the Tasks are loaded.
If TASK1 is completed and then TASK2 is started, the Estimated Completion Date/Time of TASK2 is recalculated based on the Actual Start Date/Time of TASK2.
TASK3, 4, 5, 6 dates are also recalculated based on the new Estimated Completion Date of TASK2.

TASK	DURATION	EST START DATE	EST COMPLETION DATE	ACTUAL START DATE	ACTUAL COMPLETION DATE
TASK1	1 working day	12 July 14.02	13 July 14.02	12 July 14.02	12 July 14.06
TASK2	2 working days	12 July 14.06	14 July 14.08	12 July 14.08	
TASK3	3 Calendar days	14 July 14.08	17 July 14.08		
TASK4	1 month (working days)	17 July 14.08	17 Aug 14.08		
TASK5	4 working days	17 Aug 14.08	23 Aug 14.08		
TASK6	5 working days	23 Aug 14.08	30 Aug 14.08		

STEP 3

TASK3 cannot be started until TASK2 has been completed.
If TASK2 is completed and TASK3 is started, the Estimated Completion Date/Time for TASK3 is recalculated based on the Actual Completion Date/Time of TASK2.
The Estimated Dates for TASK4 are recalculated based on Estimate Completion Date of TASK3. However because TASK3 uses Calendar days and TASK4 uses Working days, the Estimate Start Date for TASK4 will be the next working day (17 July).

TASK	DURATION	EST START DATE	EST COMPLETION DATE	ACTUAL START DATE	ACTUAL COMPLETION DATE
TASK1	1 working day	12 July 14.02	13 July 14.02	12 July 14.02	12 July 14.06
TASK2	2 working days	12 July 14.06	14 July 14.08	12 July 14.08	12 July 14.13
TASK3	3 Calendar days	12 July 14.13	15 July 14.14	12 July 14.14	
TASK4	1 month (working days)	17 July 14.14	17 Aug 14.14		
TASK5	4 working days	17 Aug 14.14	23 Aug 14.14		
TASK6	5 working days	23 Aug 14.14	30 Aug 14.14		

STEP 4

If TASK3 is completed and TASK4 started, the Estimate Completion Date/Time of TASK4, is recalculated based on the Actual Start Date of TASK4.
TASK5 Estimate dates are then recalculated based on the Estimate Completion Date/Time of TASK4.

TASK	DURATION	EST START DATE	EST COMPLETION DATE	ACTUAL START DATE	ACTUAL COMPLETION DATE

TASK1	1 working day	12 July 14.02	13 July 14.02	12 July 14.02	12 July 14.06
TASK2	2 working days	12 July 14.06	14 July 14.08	12 July 14.08	12 July 14.13
TASK3	3 Calendar days	12 July 14.13	15 July 14.14	12 July 14.14	12 July 14.24
TASK4	1 month	12 July 14.24	14 Aug 14.24	12 July 14.24	
TASK5	4 working days	14 Aug 14.24	18 Aug 14.24		
TASK6	5 working days	18 Aug 14.24	25 Aug 14.24		

STEP 5

If TASK4 is completed, TASK5 is automatically started. TASK5 cannot start until preceding tasks have completed.
The Estimate Completion Date/Time for TASK5 is recalculated based on its Actual Start Date/Time.
TASK6 Estimate dates are also recalculated based on the Estimate Completion Date/Time for TASK5.

TASK	DURATION	EST START DATE	EST COMPLETION DATE	ACTUAL START DATE	ACTUAL COMPLETION DATE
TASK1	1 working day	12 July 14.02	13 July 14.02	12 July 14.02	12 July 14.06
TASK2	2 working days	12 July 14.06	14 July 14.08	12 July 14.08	12 July 14.13
TASK3	3 Calendar days	12 July 14.13	15 July 14.14	12 July 14.14	12 July 14.24
TASK4	1 month	12 July 14.24	14 Aug 14.24	12 July 14.24	12 July 14.29
TASK5	4 working days	12 July 14.24	18 July 14.29	12 July 14.29	
TASK6	5 working days	18 July 14.29	25 July 14.29		

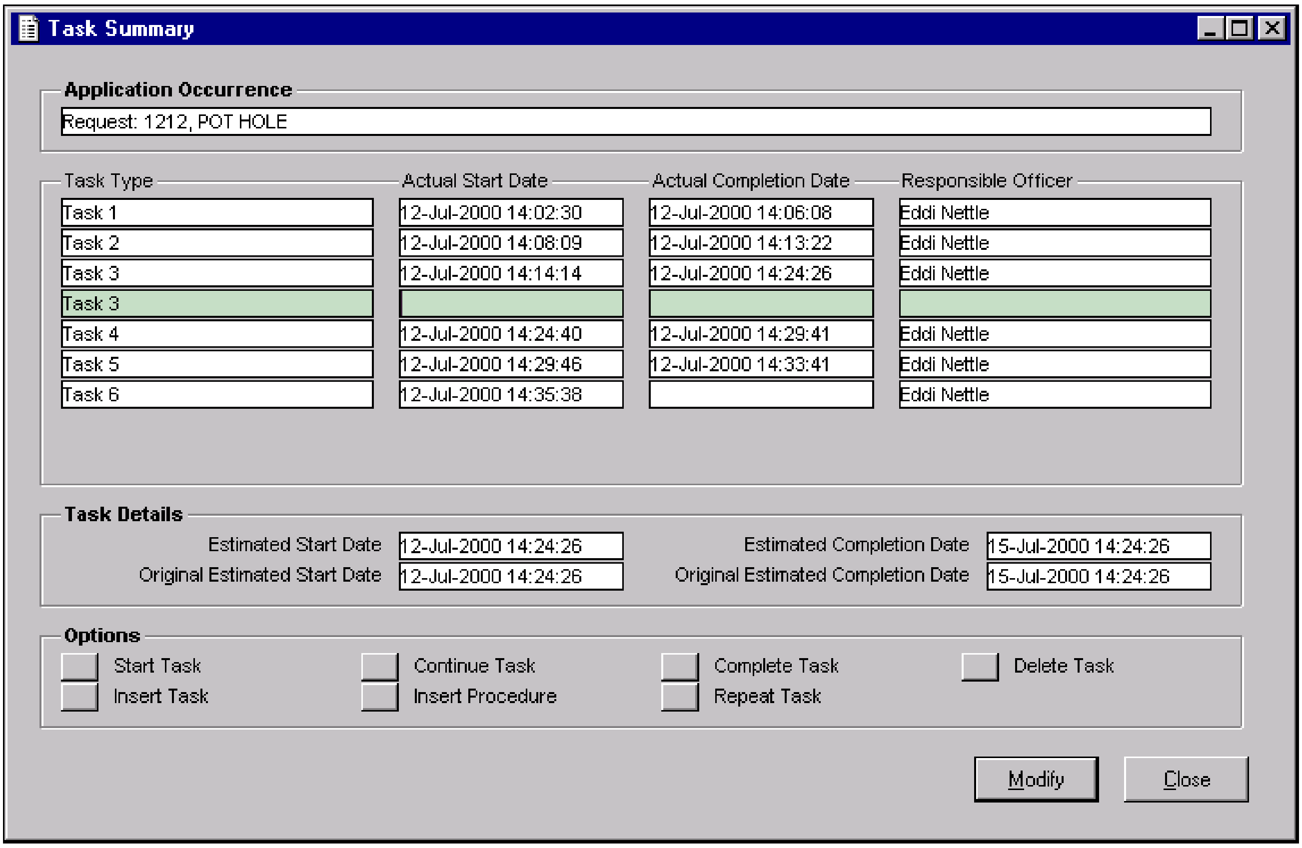
STEP 6

If TASK5 is completed, then the Estimate Date/Times for TASK6 are recalculated based on the Actual Completion Date/Time of TASK5.

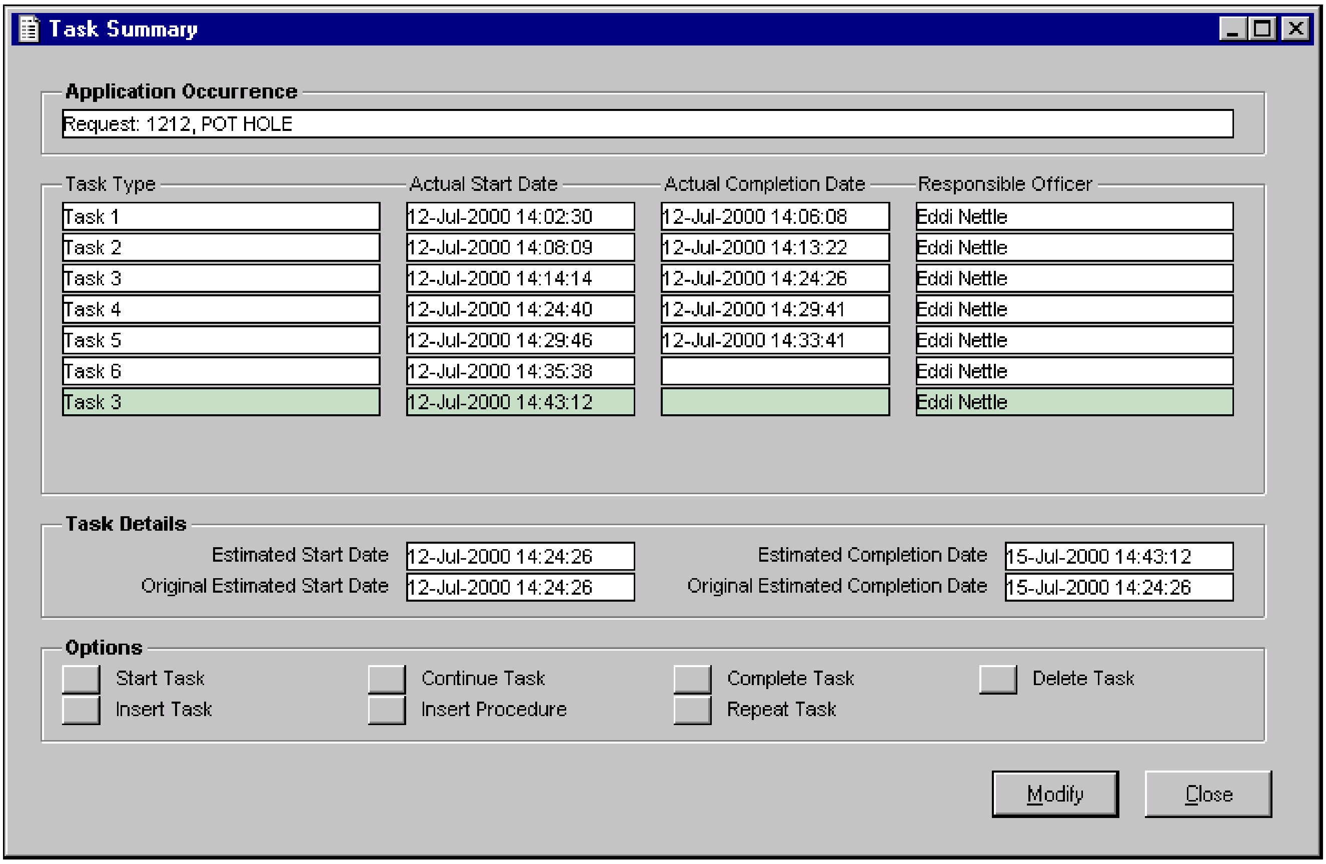
TASK	DURATION	EST START DATE	EST COMPLETION DATE	ACTUAL START DATE	ACTUAL COMPLETION DATE
TASK1	1 working day	12 July 14.02	13 July 14.02	12 July 14.02	12 July 14.06
TASK2	2 working days	12 July 14.06	14 July 14.08	12 July 14.08	12 July 14.13
TASK3	3 Calendar days	12 July 14.13	15 July 14.14	12 July 14.14	12 July 14.24
TASK4	1 month	12 July 14.24	14 Aug 14.24	12 July 14.24	12 July 14.29
TASK5	4 working days	12 July 14.24	18 July 14.29	12 July 14.29	12 July 14.33
TASK6	5 working days	12 July 14.33	19 July 14.33		

INSERTING ADDITIONAL TASKS

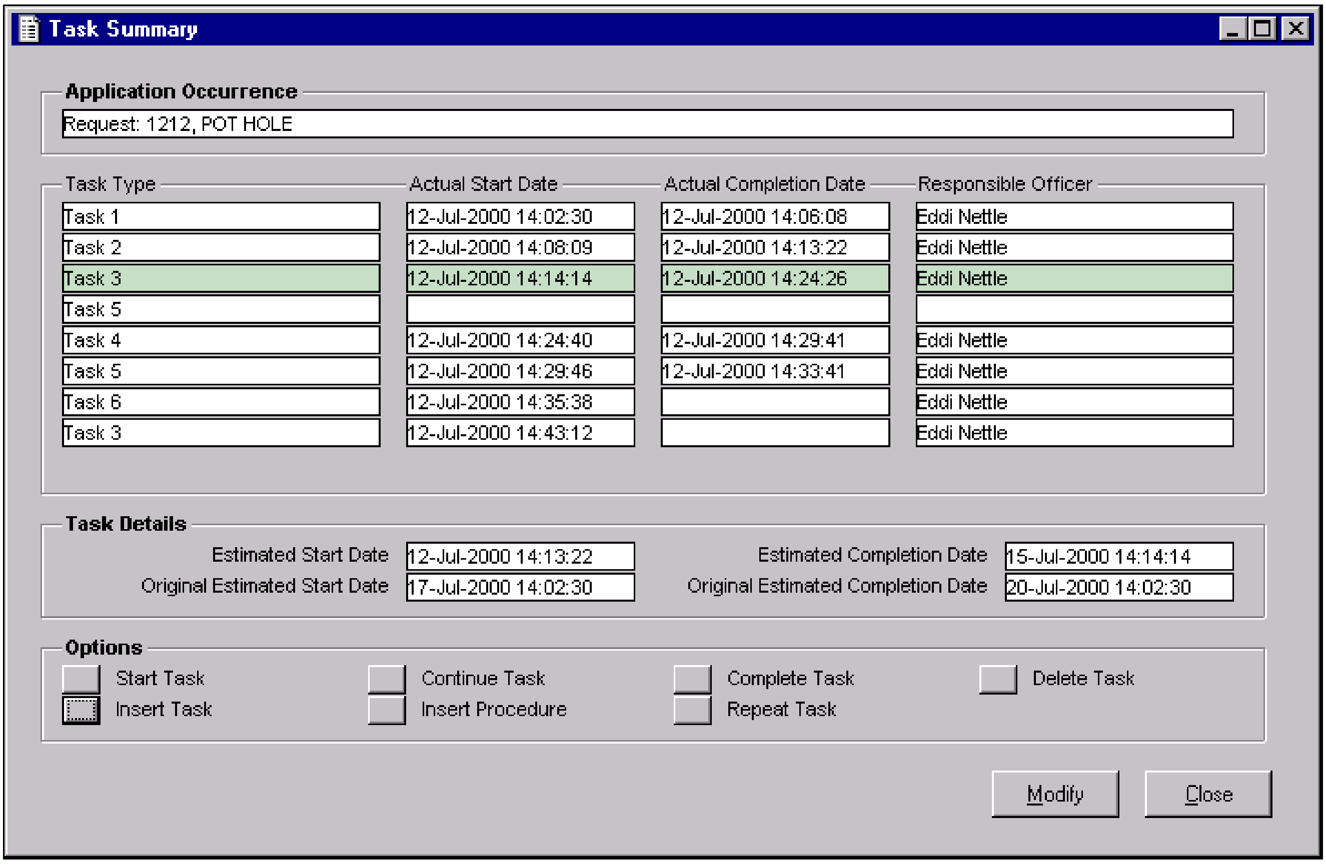
If another TASK3 is inserted after the original TASK3, it will be placed following the original TASK3 initially as it adopts TASK3's Actual Completion date as its Estimated Start Date.



But once it is started it will be repositioned at the end of all other started tasks as its Actual Start Date is later than that of the other Tasks.



If an Auto Initiated Task is inserted after a completed Task, it will need to be manually started.



Care must be taken when specifying Previous and Following tasks as the order of tasks displayed may be affected, and Tasks may not appear in the order in which they have been set up.
If a Task has no previous or following tasks, then it can be started at any time without waiting for another task to complete. It will be allocated an Estimate Start Date/Time at the point of Task creation (usually similar to the first task).