Word Processing User Guide

Feedback
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Pathway 3.09 (Thick Client Version)

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WORD PROCESSING USER GUIDE

Overview

The Word Processing Module is designed to allow the generation of documents within The Pathway product.

Each Application involves creation of a “Skeleton” document that has the main body of fixed text such as standard headings, general text describing the purpose of the document and signatory if required. These documents are called “Merge Types.

Merge Types may have a series of Extract Fields assigned to the document, these fields will extract information from the various modules of Pathway.

Merge Types may then have “Extract Types” assigned to them.
Extract Types are INFOR Defined and contain specific data relating to the Type of Extract.
Examples of Extract Types may be Zones, Parcel Conditions, Property Conditions, Land Use, etc. Depending on information required in the letter one or more Extract Types may be assigned to the Merge Type.

Once a Merge Type has been defined with the appropriate Fields and Extract Types, these may be used in the Application they have been created in. Certificates, Notices and Letters may be created using these Merge Types.

The Word Processing Module also allows for the production of Labels in the Name and Address module.

Documents can be printed instantly, or set as a Batch Run.

Parameters

This Chapter describes the establishment of Parameters which control the Word Processing System. This includes the Word Processors to be used and their related Directory structures. The establishment of these Parameters is required prior to any Document creation.

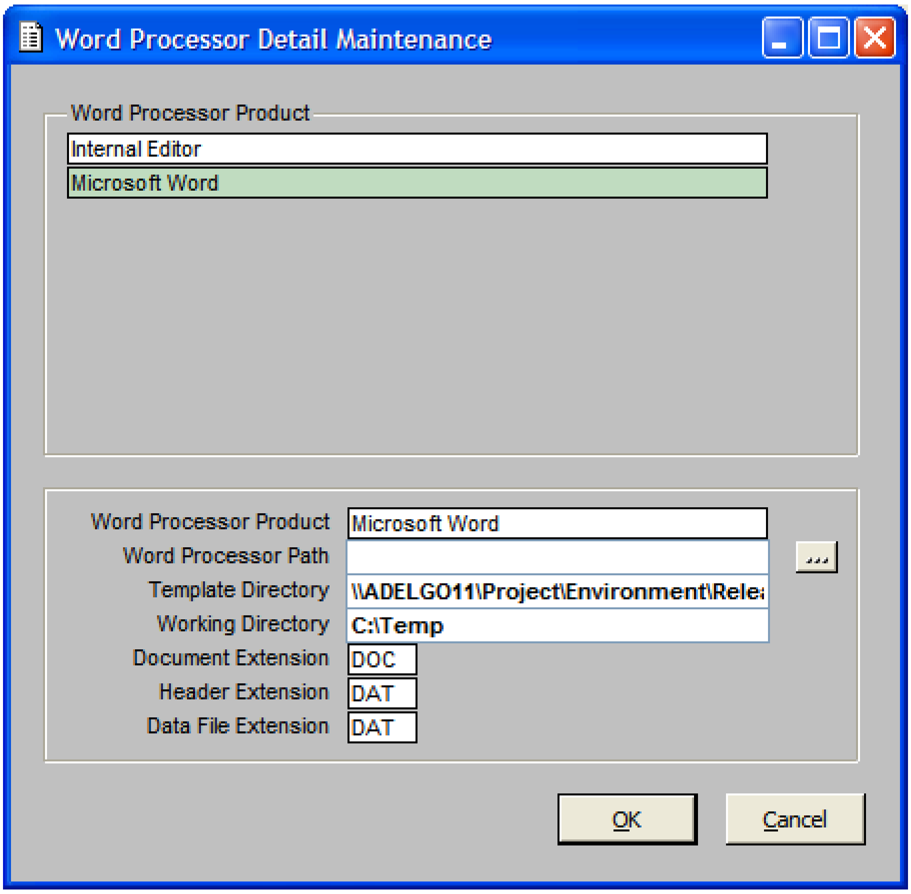
The following topics are covered in this section:

Maintain Word Processor Details

This Parameter enables the Word Processing path and directory details to be defined for each Word Processor Product.

Word Processor Detail Maintenance Form

This form enables the Word Processor Path, Document and Working Directory details for each available Word Processor Product to be defined.



Word Processing Detail Maintenance Form

Changes to supported Microsoft Products
As of Release 3.05 of Pathway (February 2010), Word 97, Word 2000 and Word XP will no longer be supported in any version of Pathway, as they are no longer supported by Microsoft.

To reflect changes in the supported word processing products within Pathway, and to provide greater clarity to users, the list of available products against the Word Processor Product field in Product Application Maintenance now simply comprises the items "Internal Editor" and "Microsoft Word". This change is also reflected within the Word Processing >> Word Processing Parameters >> Maintain Word Processor Details menu option.

COM Interface
The Word Processing Interface to all versions of Word that are supported by Pathway (i.e. Word 2003, XP and 2007) uses a COM Interface instead of a DDE Interface. This means that the location of the Word Processor does not have to be specified in the Word Processing Parameters as Pathway will use the Registry settings.

Word Processor Product Description
This field contains the available Word Processing Products. It allows the user to select a Word Processor Product Description and display or enter the access details in the bottom half of the form.

Word Processor Product
This field displays the Word Processor Product Description selected in the top half of the form.

Word Processor Path
The Word Processor Path defines the Directory structure where the executable file for each Word Processing package resides. This path should be nominated for those Word Processors which are to be utilised to generate Documents.

The Detail Button is available to access a File Manager screen to assist in this selection process.

The Word Processing Interface to all versions of Word uses a COM Interface instead of a DDE Interface. This means that the location of the Word Processor does not have to be specified in the Word Processing Parameters as Pathway will use the Registry settings.

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

This directory stores the INFOR defined macros that allow Pathway to move in and out of your Word Processing Package.

The Template Directory is located at ….tpl/WW8. Word 2003, XP and 2007 use the macros that are stored in the TPL/WW8 directory.

These directories will contain the following template files:
- Doctype.dot
- Exttype.dot
- Mrgtype.dot

Document Directory
This field contains the Directory path where all the documents that are created within Pathway are stored – Extract Documents, Merge Documents, Header files, Final documents etc. This path may be a single file letter (e.g. R:) or a drive and directory path (e.g. R:\DOCS). The Document path must not end in a back-slash. The drive may be a local or network drive, although a network drive is advised if the Documents require access by multiple staff. The existence of the directory will be checked when it is entered against a Word Processor Product.

A Directory Structure will then be implemented to contain all Header, Template and Final Documents.

> **Note:** The combined length of the path and filenames of the Template and Document Directories should not be more than 50 characters in length.

For example :Document Directory: R:\DOCS
The following directory structure would be created

```
R:\DOCS
          \LPA
                \FINAL        \00000000\
                \HEADER       \00000000\
                \INCLUDE      \00000000\
                \MEMOS        \00000000\
                \TEMPLATE     \00000000\
                \STATTXT      \00000000\
```

> **Note:** The \HEADER directory is created automatically when Header files are created. The other directories are created as the appropriate documents are generated.

The directory 00000000 is a generated directory based on the documents that will be stored in the directory, e.g. If a document with the number 00080056.DOC is created as a Final document in the Property Module, it will be stored at the following location: R\DOCS\LPA\FINAL\00080000\00080056.DOC

The following Documents are contained within each lowest level subdirectory:

FINAL	This contains the Final resolved Documents for each Application. This includes final Condition Documents
HEADER	This contains the Extract Lists and Merge Type header files which are created interactively and identify the fields related to each Merge Type. When Headers are created this will create named documents for each application such as APPFEE.DAT
INCLUDE	This stores the Yes/No documents
TEMPLATE	This contains the template skeleton documents for each Application (Merge Types and Extract Types)
STATTXT	This contains any Static Text documents created for the module

Storage of documents at a remote location is available using FTP. This allows documents from one application to be stored on an FTP site while documents from another application on a network drive. The FTP site can be on a UNIX platform or a Windows NT platform. Please refer to the section on FTP Document Storage for further details.

Working Directory

This field defines where all the Word Processing generations and merges occur. It is recommended that the Working directory is defined as the local drive, with an optional directory path (e.g. C: or C:\TEMP).
When a document is to be stored at an FTP site, the file is initially stored in the Working Directory. When an old document is viewed, the file is retrieved from the FTP location and stored in the Working Directory. When a document is closed, the file is written back to the FTP location and the working file is deleted.

Document Extension

The Document Extension is pre-determined for each Word Processor product. All Final Documents created within the Directory structure will have this extension.

Header Extension

The Header Extension is pre-determined for each Word Processor product. All Header Documents created within the Directory structure will have this extension.

Data File Extension

The Data File Extension is pre-determined for each Word Processor product. The Data File is an intermediate working file used in the Word Processing Document extraction process.

FTP Location Maintenance

Word Processing documents can be stored remotely on an FTP site. This allows documents from one application to be stored remotely, while documents from another application are stored on a network drive. The FTP site can be on a Unix platform or a Windows NT platform.

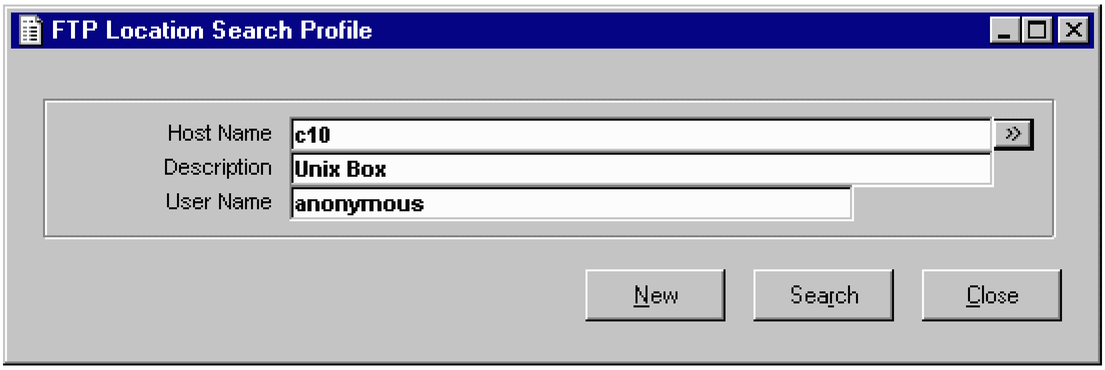
A directory needs to be created to store the documents on the FTP site (i.e. \Pathway\Documents, known as the root directory. The complete directory structure will be created by Pathway as required.

When a new document is created in Pathway, the file is initially stored in the working directory (i.e. A Customer Service Memo will be stored in Working Directory\ACR\MEMOS\00000000). When an old document is viewed, the file is retrieved from the FTP site and stored in the working directory. When a document is closed, the file is written back to the FTP site (i.e. Root Directory\ACR\MEMOS\ 00000000) and the working file is deleted.

The Username and Password are used by the software to access the FTP location when maintaining documents.

FTP Location Search Profile Form

This form allows the selection of an FTP Location occurrence to maintain or the creation of a new location. Selecting the 'New' button will display the FTP Location Maintenance form allowing the user to enter details for a new FTP site.



FTP Location Search Profile Form

Host Name

Enter a Host Name on which to search or select one from the Pop Up. When a Host Name is selected from the Pop Up, the related Description and User Name will default into the appropriate fields. Press the Search button to initiate the search.

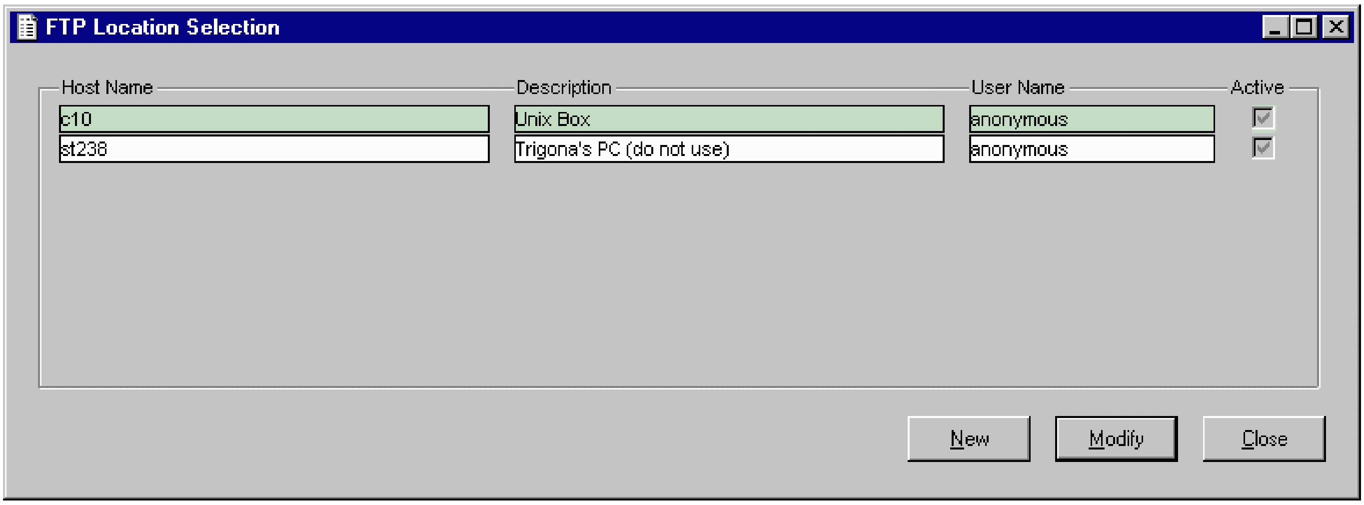
Description

Enter an FTP site description and press the Search button to initiate the search.

User Name

Enter a User Name and press the Search button to initiate the search.

FTP Location Selection Form



FTP Location Selection Form

Host Name / Description

These fields display the FTP host locations that are available for selection.

User Name

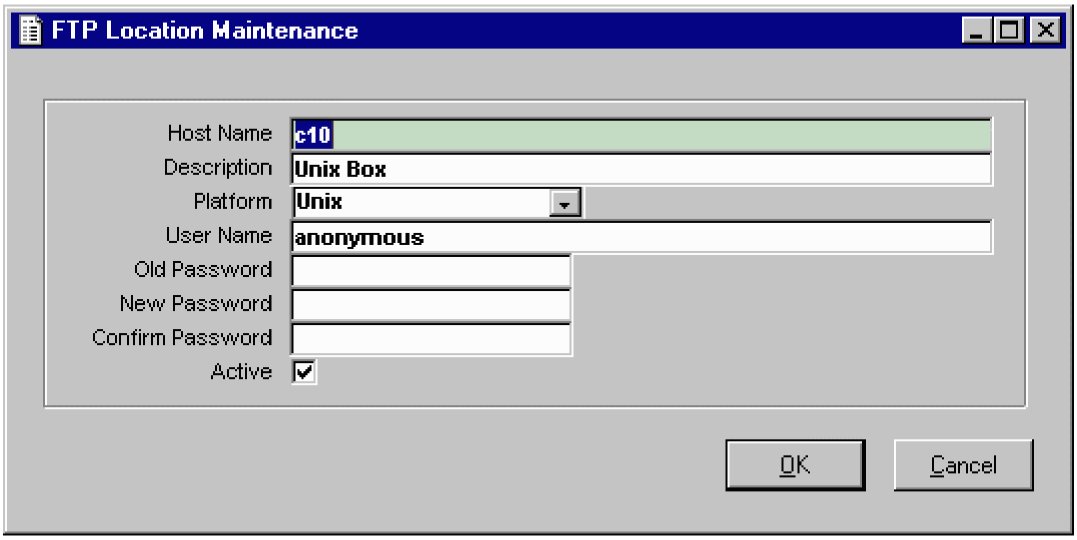
This field displays the User Name which has been assigned to each FTP location.

Active

The Active flag will be checked on if the particular FTP location has been made available for use. This field is display only on this form.

FTP Location Maintenance Form

This form allows the maintenance of FTP Location details. Users are able to define any number of FTP sites.



Location Maintenance Form

Host Name

This field contains the Host Name of the FTP Location.

Description

This field contains a description for the FTP Location.

Platform

This field allows selection, via a dropdown, of a platform, e.g. Unix or Windows.

User Name
This field contains a User Name to use when accessing the FTP Location.

Old Password
When maintaining an FTP location and the password is going to be changed, the user needs to enter the existing password in this field so it can be validated by the software.

New Password
Enter a new password in this field when creating or changing the password.

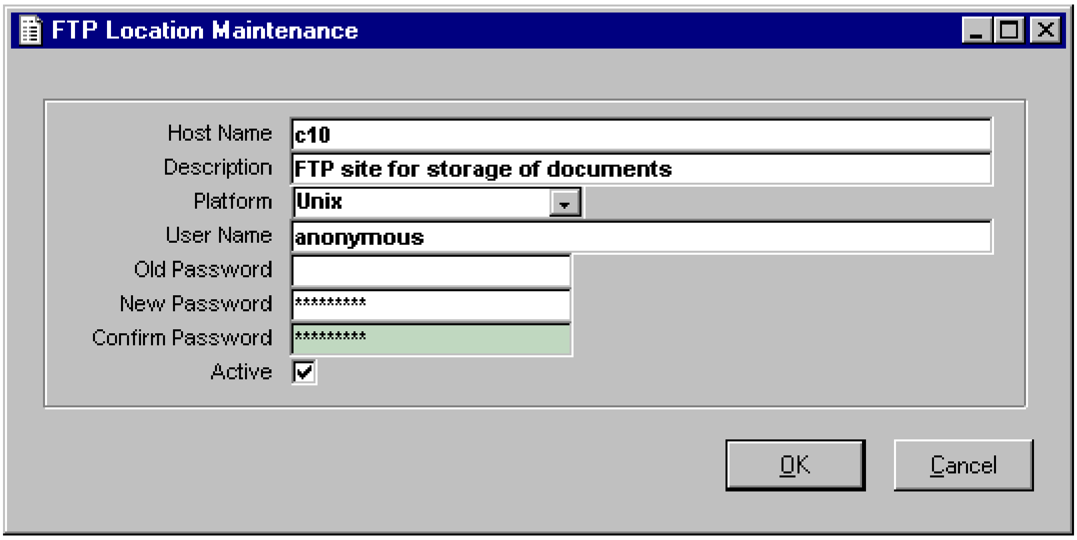
Confirm Password
This field is used for confirming the new password which has been entered in the New Password field. It is used only when creating or changing the password.

Active
This flag should be checked on to make this FTP Location active.

Setting up an Application to use FTP Storage

The following steps can be followed to create a remote FTP location for storing documents.

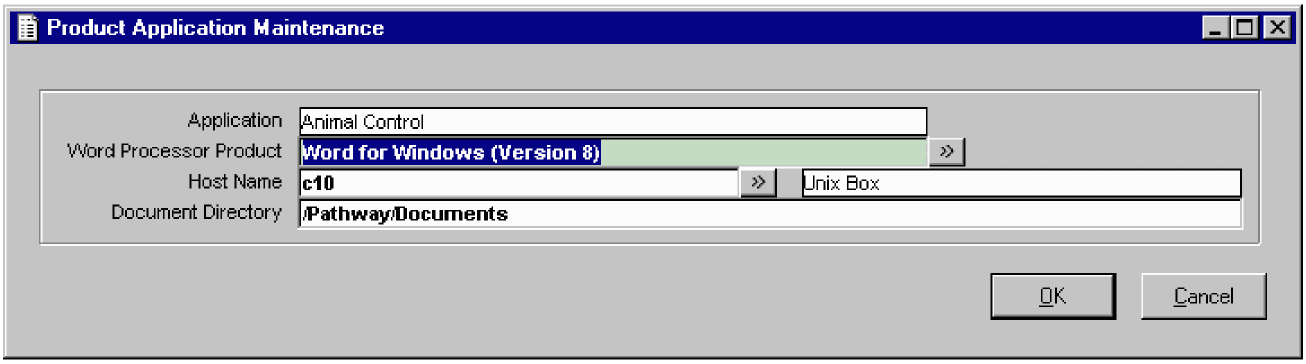
<u>Define an FTP site within Pathway.</u>
1. Go to the Menu Option [Word Processing Parameters] [FTP Location Maintenance]
2. Click 'New' in the 'FTP Location Search Profile' form
In the 'FTP Location Maintenance' Form
3. Enter the Host Name and a Description.
4. Select the Platform (UNIX or Windows).
5. Enter the User Name, New Password and Confirm Password.
6. Click 'OK'



B. Create the directory on the FTP site in which to store the documents.
Connect to the FTP site and check that the required directory exists. If it does not already exist, then it needs to be created.

C. Set up an Application to store its documents on the FTP location
1. Select the Menu Option [Word Processing Parameters] [Product Application Maintenance]
2. Select an application and click 'Modify'.
In the 'Product Application Maintenance' form
3. Click on the Host Name 'Popup' Button.
4. Select the FTP Location defined in Step A.

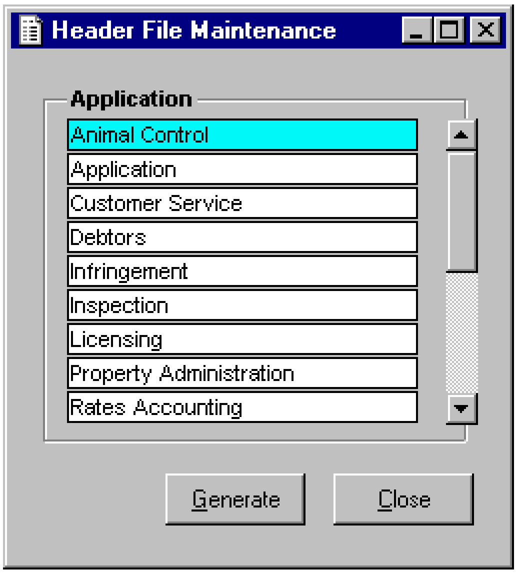
5. Change the 'Document Directory' to the directory created in Step B. (Note: This directory will be validated, so it must already exist on the FTP site. The 'Document Directory' details are also case sensitive on a Unix platform so ensure that the Document Directory case matches the details located on the Unix machine).
5. Click 'OK'
An application has now been set up to store its documents on an FTP location.



D. Copy the old documents from the old location to the Document Directory on the FTP site .
When these files are copied, be sure to maintain the same directory structure.

Note: Unfortunately moving these documents does not update the internal links to data sources within the document. These internal links will still point to the old document location. **For this reason a copy of all of the header files must remain in the old location.**

E. Re-generate the Headers.
1. Select the Menu Option [Word Processing Parameters] [Header File Maintenance]
2. In the Header File Maintenance form select an application and click 'Generate'.
The Header files will be re-generated and stored on the FTP site.

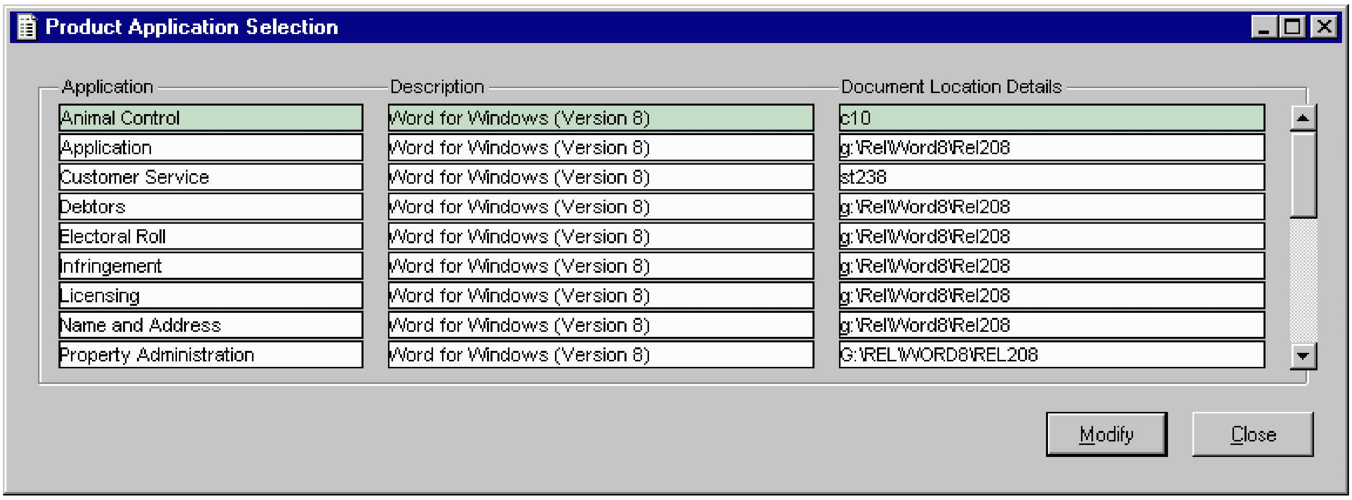


F. Attach the Data sources to the Extract Types and Merge Types.
The internal links in the documents cannot be updated automatically, so <u>this step must be performed manually.</u> Each of the Merge Type and Extract Type documents need to be opened and have the associated data source reattached. To do this, go to Extract Type Maintenance under the Application that is being changed and open each of the Extract Type documents. When these documents are closed the link to the data source will be automatically updated to the new location. Once this has been done for all of the Extract Types, the same steps need to be performed for Merge Types. i.e.: Detail out to each individual Merge Type and then close and save each Merge Type.

Product Application Maintenance

This parameter defines the Word Processor Product which will be used to create documents for each Application module.

Product Application Selection Form



Product Application Selection Form

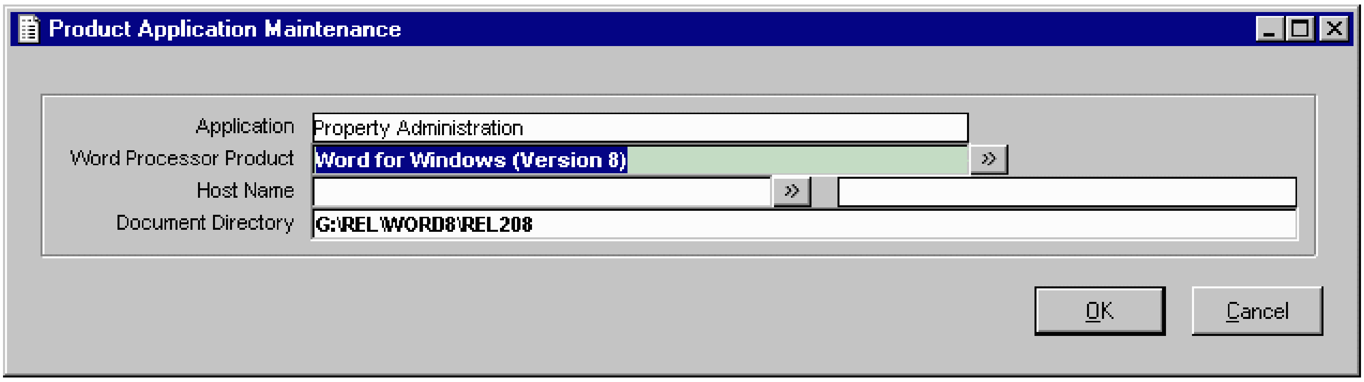
Application
This field displays the Application for which a Word Processor product has been set up.

Description
This field displays the Word Processor product which has been set up to be used for each Application Module. To change any details, select the line and press the Modify button.

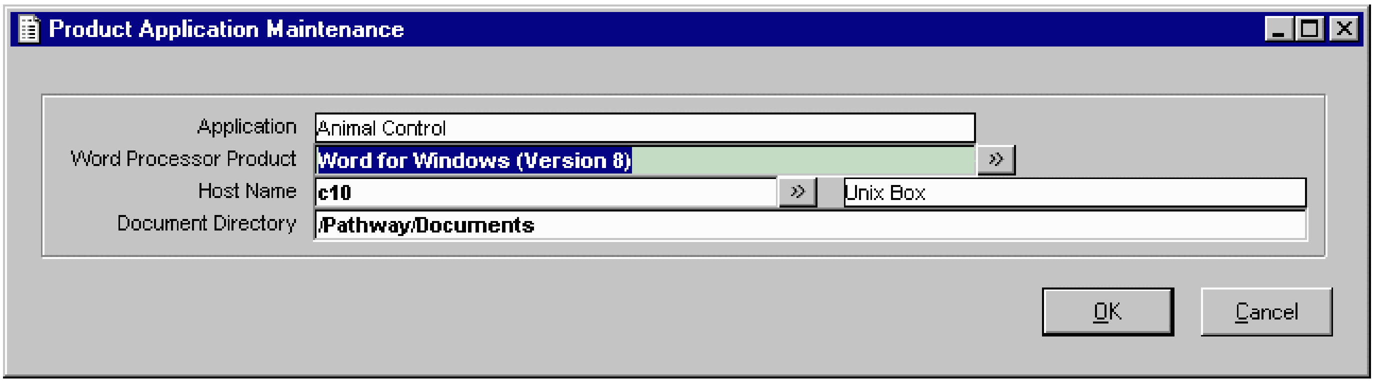
Document Location Details
This field displays the location for the storage of documents created within Word Processing. To change any details, select the line and press the Modify button.
If the location is an FTP site, then the Host Name is entered instead of the directory path.

Product Application Maintenance Form

This form enables the word processor product and the document directory required for each Application module to be defined.



Product Application Maintenance Form (document storage on a network drive)



Example showing settings for FTP site location

Application

This field displays the selected application. This field is display only.

Word Processor Product

This field allows selection of a Word Processor product to be used for the application. Details can be keyed in or a selection can be made from the Pop Up. The options available will be the Word Processor products which are defined under Word Processor Detail Maintenance.

Host Name

These fields relate to remote storage of documents on an FTP site and contain details of the FTP site. Details can be keyed in or selected from a Pop Up list of FTP sites which are defined under FTP Location Maintenance.

Document Directory

This field contains the directory path for the storage of documents on the network,
e.g. R:\DOCS
For FTP sites this will be the path which has been set up on the remote PC,

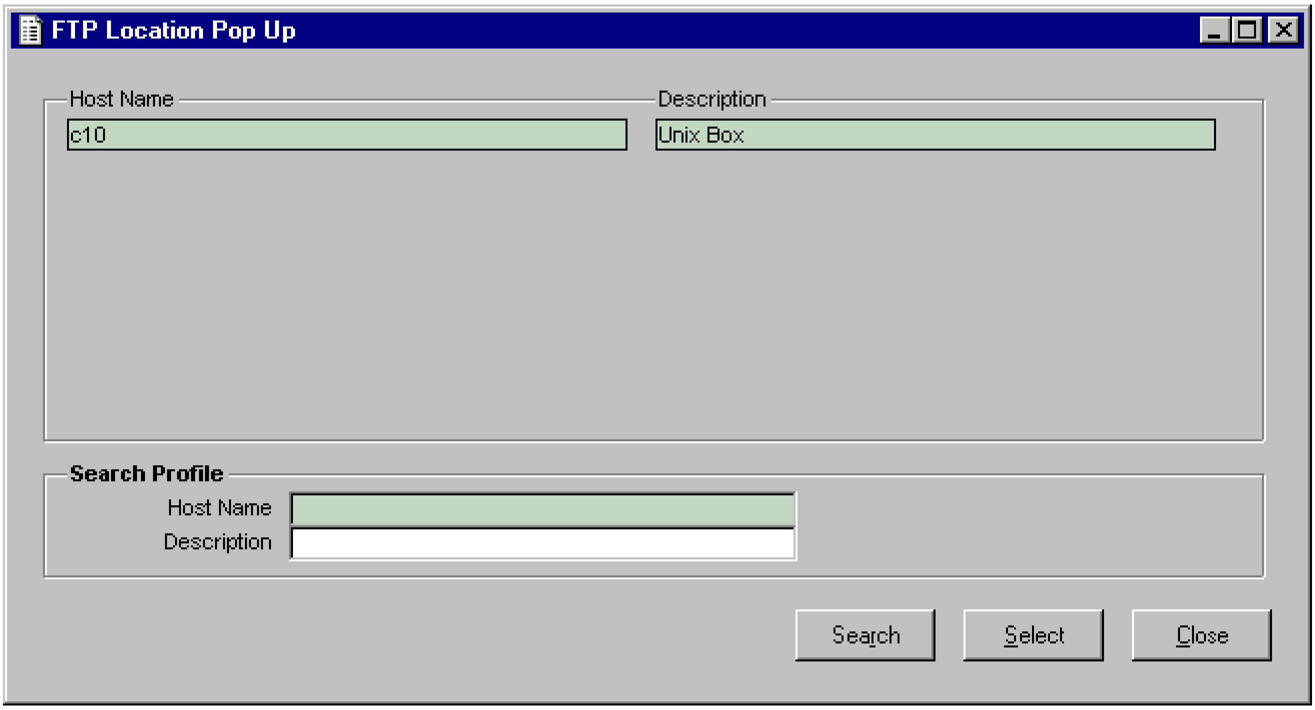
e.g.	/PATHWAY/DOCUMENTS	(for Unix sites)
	R:\PATHWAY\DOCUMENTS	(for Windows sites)

Document Management

This field provides a dropdown list to allow the user to enable any external document management system which a site may have set up to store Pathway generated documents. The default is normally set to (none). This field may be set differently for individual applications, dependant upon whether the user requires that the documents generated by a particular application e.g. Licensing, to be stored in a different location from the normal Pathway location, by an external document management system.

FTP Location Pop Up Form

This form allows selection of an FTP remote site at which to store documents generated within the Pathway Word Processing module.



FTP Location Pop Up Form

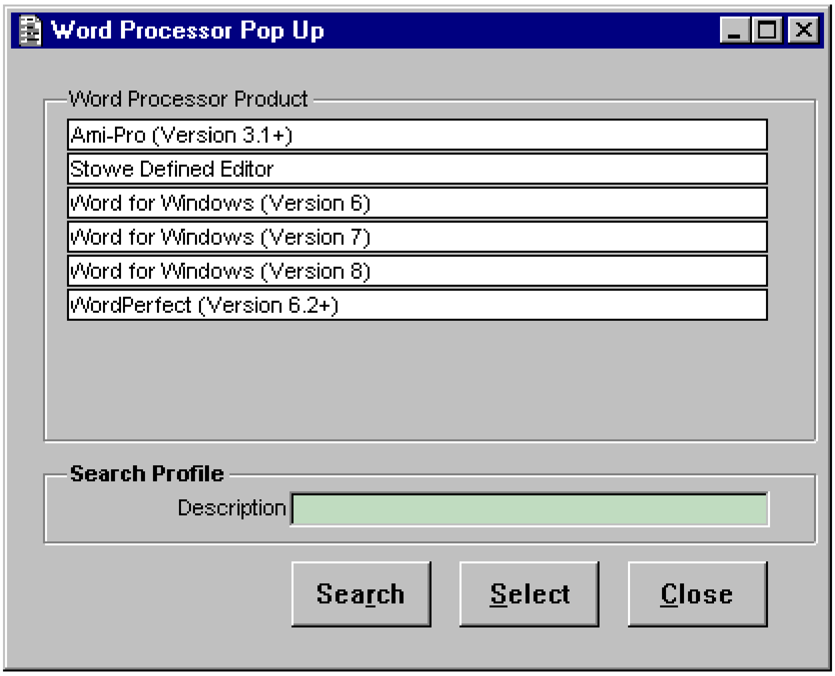
Host Name
This field displays the Host Name of the remote site.

Description
This field displays the Host Name Description of the remote site.

Search Profile - Host Name/Description
These fields allow searching on a Host Name and/or Description. This function is useful when there are more than 9 Host sites to search through. Wildcard searching is available.

Word Processor Pop Up

This form contains a list of all the available word processing products that are available for selection. A word processor product may be allocated to each application.



Word Processor Pop Up Form

Description
This field contains the description associated with each available word processor product. This field is display only and cannot be maintained.

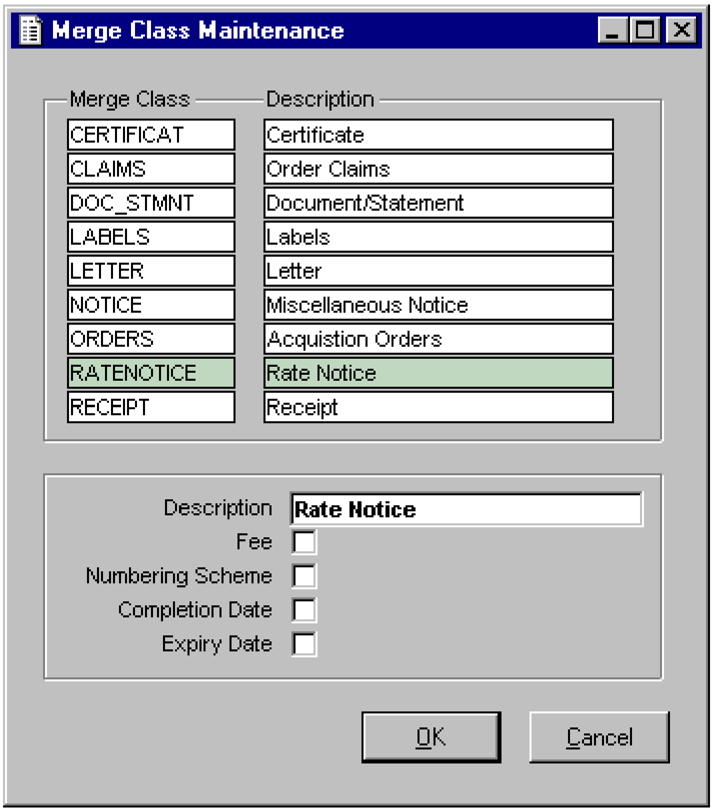
Search Profile - Description
Enter a description (or part thereof) on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

Merge Class Maintenance

The available Merge Classes are system defined. This Parameter enables the options associated with these Merge Classes to be amended as required.

Merge Class Maintenance Form

This form enables the attributes of Fee, Numbering Scheme, Completion Date and Expiry Date to be Activated or Deactivated for each Merge Class.



0*Merge Class Maintenance Form*

Merge Class
The Merge Class identifies the types of documents that can be produced from the Word Processing system. These are system defined document types. The available Merge Classes are Certificate, Labels, Letters, Rate Notice, Notices and Receipt.

Merge Class Description
The Merge Class Description further describes each of the Merge Classes. The available Merge Classes are Certificate, Labels, Letters. Notices, Rate Notice and Receipt. This Description can be amended as required.

Fee
If this checkbox is checked on for a particular Merge Class, the option to enter a Fee amount during the Document generation process is available. For example, a Fee may be required when creating Land Agent Certificate Documents.

Numbering Scheme
If this checkbox is checked on for a particular Merge Class, the option to define a Numbering Scheme code is available when creating the document. The Numbering Schemes are defined in a separate Parameter

option. (Refer Numbering Scheme Maintenance) For example a unique number may be required for all Certificates or Notices produced.

Completion Date Allowed
If this checkbox is checked on for a particular Merge Class, the facility to enter a Completion Date during the Document generation process is available.

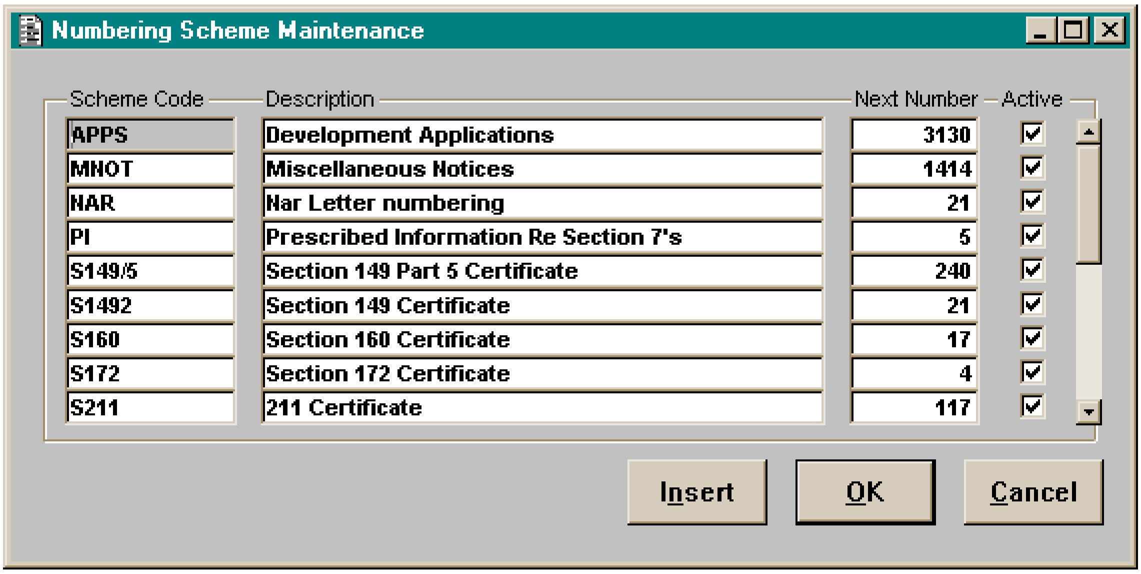
Expiry Date
If this checkbox is checked on for a particular Merge Class, the facility exists to enter an Expiry Date during the Document generation process or calculate this date based on an Expiry period entered on the Merge Type (Refer to Merge Type Maintenance).

Numbering Scheme Maintenance

This Parameter enables a series of Numbering Schemes to be defined to enable a concurrent number to be generated for different types of Documents.

Numbering Scheme Maintenance Form

This form enables Numbering Schemes to be created for different types of documents. Numbering schemes may be created, maintained, deleted or deactivated from this form.



Numbering Scheme Maintenance Form

Scheme Code
A Scheme Code identifier needs to be entered for each Numbering Scheme. This is an alphanumeric code that can be up to ten characters.

Description
The Description field should further identify each of the Numbering schemes created.

Next Number
The Next Number should be identified for each new scheme created. The numbering may start at any required number. The Next Number is mandatory for any scheme codes created.

Note: Changing the Next Number back after the generation of documents using this Numbering Scheme will result in a duplicate allocation of numbers. It is recommended that this number is not set back after the generation of Documents has commenced.

Active
The Active checkbox determines whether the Numbering Scheme is currently available for use. If the Active checkbox is unchecked, the numbering scheme cannot be allocated to a document. All new Schemes are defaulted as Active.

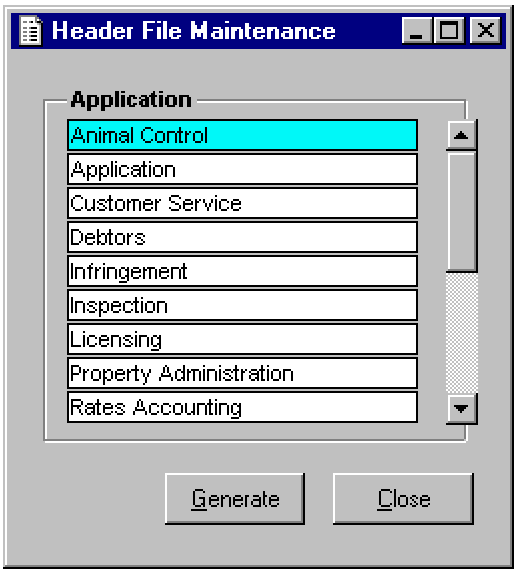
Header File Maintenance

This parameter enables Header files to be generated or regenerated for all or selected applications.

Note: If an extract list for an application is changed or added to during an upgrade of software, then the header files for that application will need to be regenerated at each site.

Header File Maintenance Form

This form will be required during the installation process, to enable all the required header files to be generated for the appropriate applications. Header files are currently utilised within Property and Applications and must be generated prior to establishing any Word Processing Template Documents.



Header File Maintenance Form

Application
This field enables the selection of the required Applications to generate Header Files.

Responses

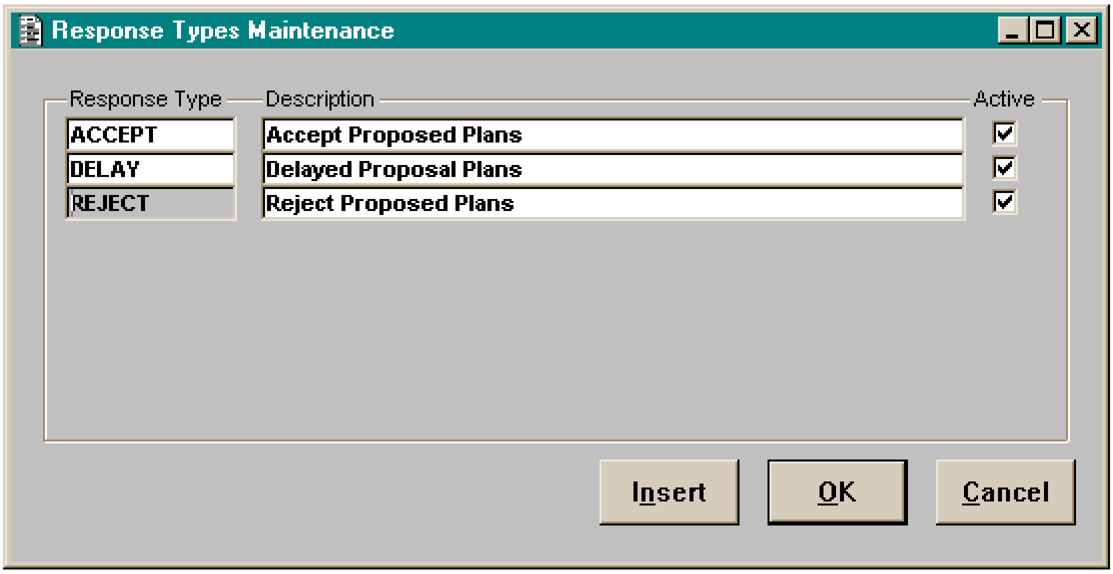
This section enables the creation of response types. Responses are utilised within the Word Processing link to various applications. A response is a text base informational message, recorded against a Word Processing document. They may record phone calls or objections to documentation received.

For example :
Within the Property Application, a Response could be entered against the issue of a Miscellaneous Notice.

Note: These parameters are set up within the Property Application Parameters (Certificate and Notice Parameters).

Response Types Maintenance Form

This form enables the creation of Response Type codes and description details.



Response Types Maintenance Form

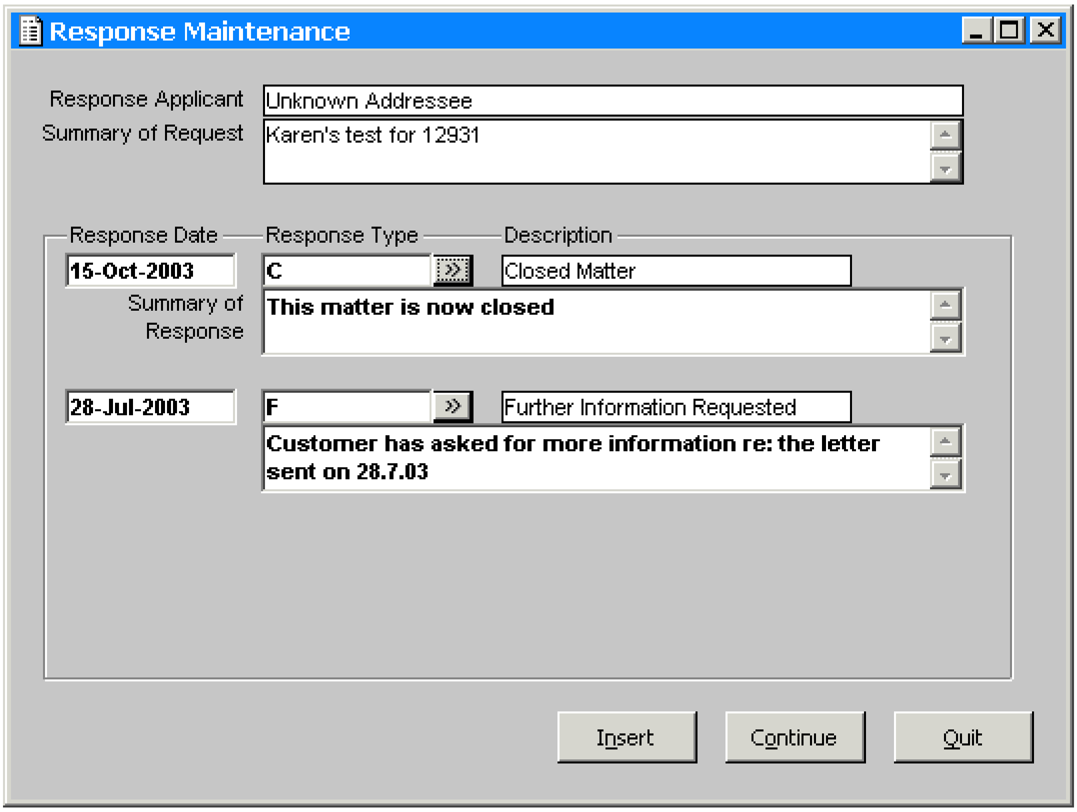
Response Type
This field contains the unique code allocated to each response type. An alphanumeric code of up to 10 characters may be entered.

Description
This field contains a further description of the response code.

Active
If this box is checked on, the Response code is available to be linked to various Word Processing Documents.

Response Maintenance Form

This form can be accessed from the Document Request Maintenance form. Responses may be recorded against Notices, Certificates and Letter Documents. Responses are listed in descending order.



Response Maintenance Form

Response Applicant

The Response Applicant defaults to the Addressee of the Document request. Only an abridged list of names is displayed, however, F2 or Zoom will list all responders. No modification or deletion of this field is allowed.

Summary of Request

This field contains the name of the Document, against which the Response is being lodged.

Response Date

This field contains the date that the Response was received This date will default to the current date, but may be changed if required. Multiple Responses may be entered for the same day if required or Response dates may be back or forward dated.

Response Type

This field contains the associated Response Type. Available Response types may be selected using the pop-up button.

Description

This field contains the description details associated with the chosen Response type. No modification or deletion of this field is allowed.

Summary of Response

This field enables a summary of the Response to a Word Processing Document to be entered. This could include a short summary of the Response detail, or a more detailed Response. Double click on the field to initiate the Zoom mode, which enables further text to be entered.

Response Maintenance Form

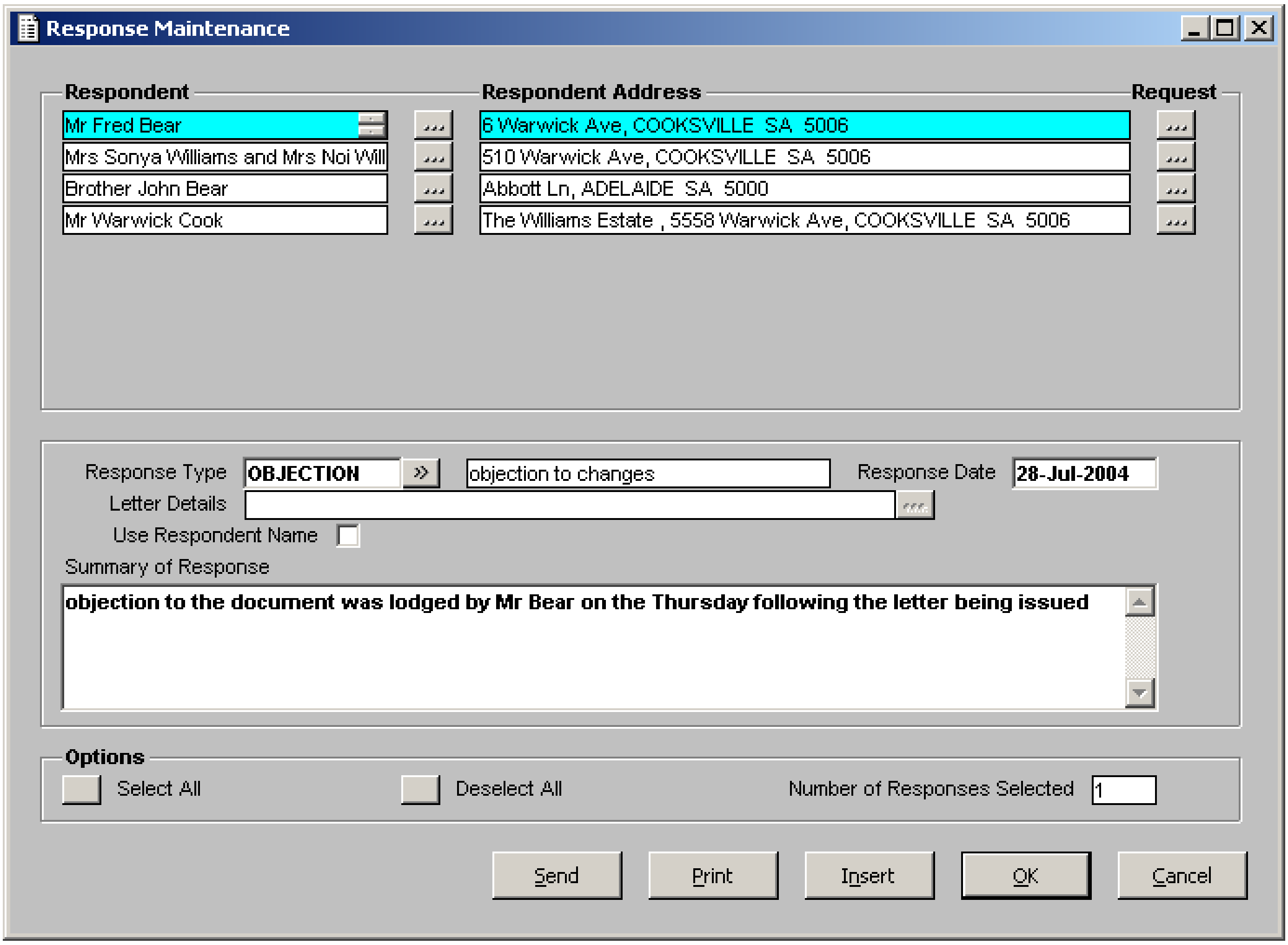
This form enables responses to be added and viewed for the following applications scenarios

- Add a new response for a name selected from the Name and Address register
- View and edit response details for Affected property names (further letter details may also be viewed)
- View and edit response details for names that have been issued standard Application letters.

This form is also used by Customer Service to enable Responses to be added to Requests.

This form now includes a “Print” button, and the form will allow multiple names to be selected. When names are highlighted, clicking the Print button will display the current Document Request Maintenance Screen. Users will then select the relevant Merge Type they wish to use for the process. The letters created from here will be stored for display in both the Response Maintenance form as well as being able to be viewed via Letter Selection.

If the user does not highlight any names and the Print button is selected, they will be presented with the Document Request screen. They should then select a Merge Type set-up to produce a list of their Objectors and Supporters. Once this list has been printed, this will not store a record of the Document produced.



Response Maintenance form

Respondent Details

These fields contain the name and address of the document request addressee or the name selected for entry of a response. No modification or deletion of these fields is allowed. New Respondents may be added by using the Insert button to select a name. Response Type and Response details (Summary of Response) will need to be entered for each new name. If an override mailing address is required for the Respondent and Detail Button Option button is displayed, then the Button can be selected to display the name maintenance form and allow the entry or selection of the required address for the respondent role record.

Request Detail Button

By pressing this button, the issued application letter may be selected for view, edit, regeneration or removal as required. This will be the letter to which the entered response details apply.

Response

This field contains the associated Response Type. Available Response Types may be selected using the pop-up button. The associated response description will also be displayed.

Response Date
This field contains the date that the Response was received This date will default to the current date, but may be changed if required. Multiple Responses may be entered for the same day if required or Response dates may be back or forward dated.

Letter Details

This field contains the description of the application letter that has been issued (where relevant). Where an application letter has been issued, the letter may be viewed via the Request detail button.

Use Respondent Name

If this option is available, when this flag is checked ON, an overriding name may be added. This name will be used in Response documents in place of the actual name in the Response Name field.

Summary of Response
This field enables a summary of the Response to a Word Processing Document to be entered. This could include a short summary of the Response detail, or a more detailed Response. Double click on the field to initiate Zoom mode, which enables further text to be entered.

Select All Button
The Select All button allows all Respondents to be selected.

Deselect All
The Deselect All button allows all Respondents to be de-selected. Only the first Response selected will remain highlighted.

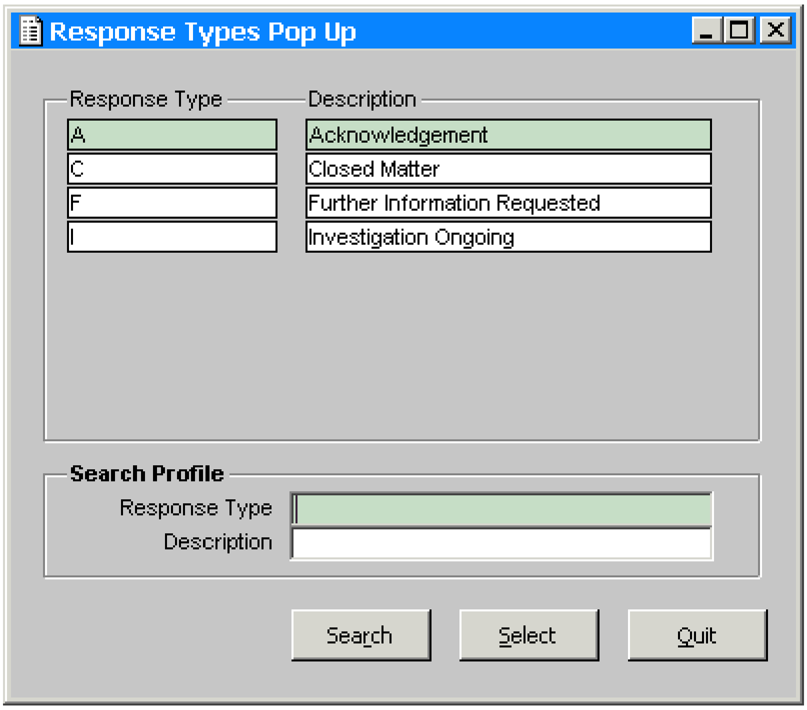
Number of Responses Selected
This field displays the total number of Responses selected.

Send Button
The Send button will display the Document Request Maintenance form where a Merge Type may be entered and documents generated for each Addressee selected in the Response Maintenance form. (Documents generated for Responses would typically contain only merge fields with no included Extract List fields)

Print Button
The Print button will prompt for a Merge Type and then it will print one document which includes Response details for each Respondent selected in Response Maintenance (using Extract List fields).

Response Type Pop Up Form

This form enables the required Response Type to be selected from the available list. Response types are defined via the Response Type Maintenance form. The search profile will assist in finding the appropriate Response Type.



Response Types Pop Up Form

Response Type
This field contains the unique code allocated to each Response Type. No modification or deletion of this field is allowed.

Description
This field contains a further description of the Response code. No modification or deletion of this field is allowed.

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

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

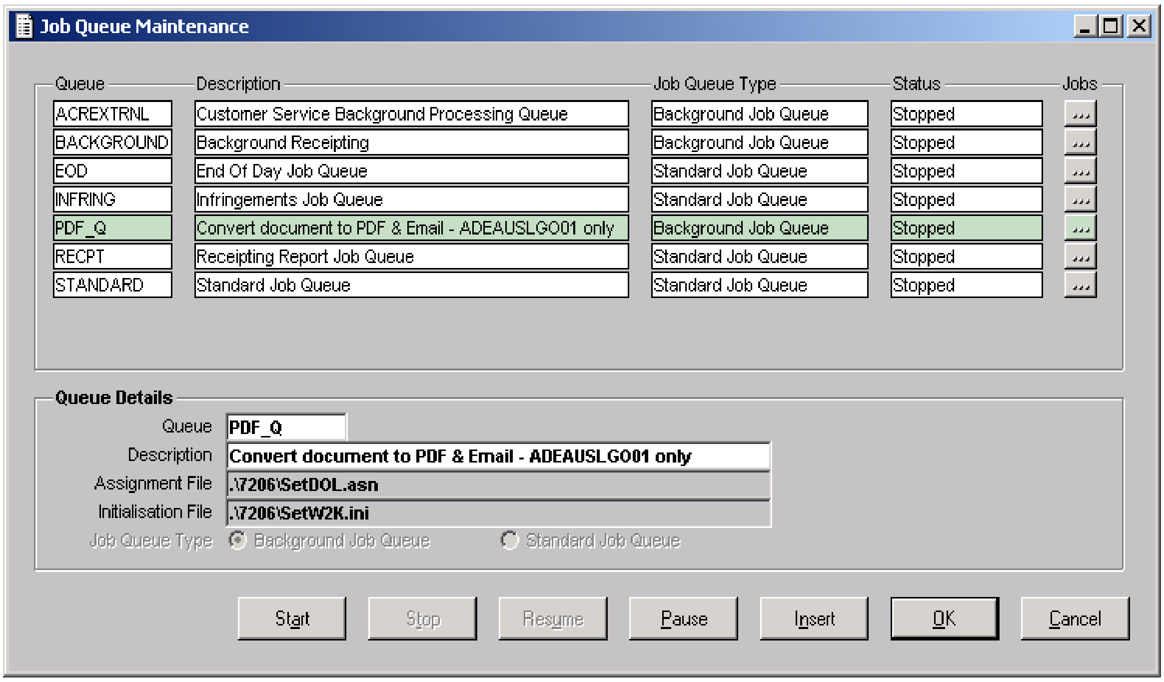
PDF Document Conversion Parameters

The following instructions describe the set up of Pathway to enable document delivery by email in PDF format.

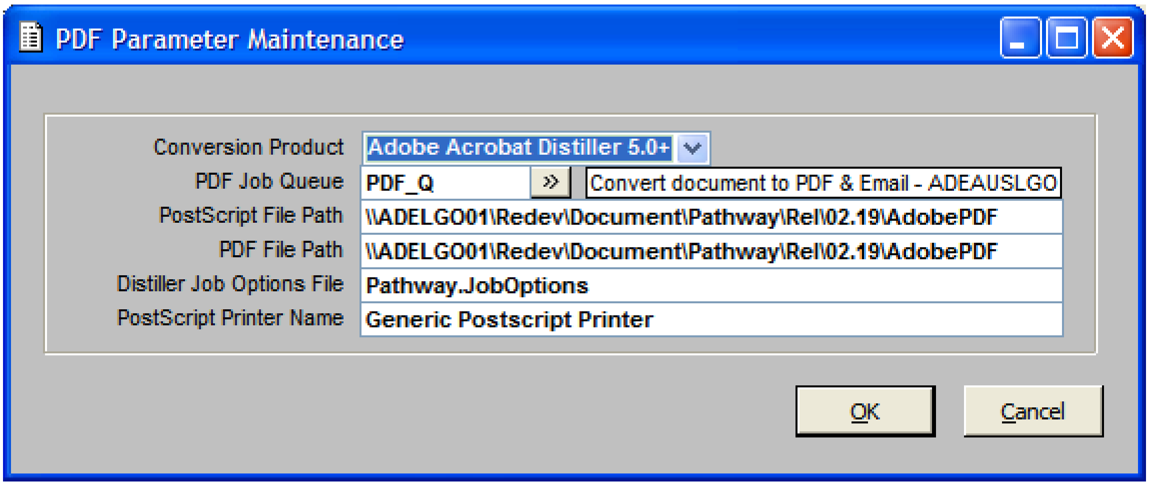
<u>Prerequisites</u>
Hardware
A PC with access to the Mail Server

Software
Windows NT4, 2000, XP
Microsoft Word 97, 2000, XP
Adobe Acrobat Full version including Distiller
Pathway
Postscript printer driver, Adobe Generic works fine.

<u>Set Up</u>
Email
Adobe Distiller
Open Distiller and create a JobOptions file called Pathway(for example).
Set the security options you wish to have in place on the PDF documents.
Pathway
PDF Job Queue
Create a Pathway Job Queue to process the PDF conversion and email.
Menu>>Batch Processing>>Maintain Job Queues Administrator Level



PDF Parameters.
Set up the Pathway PDF parameters.
Menu>>System Administration>>Word Processing>>PDF Parameters

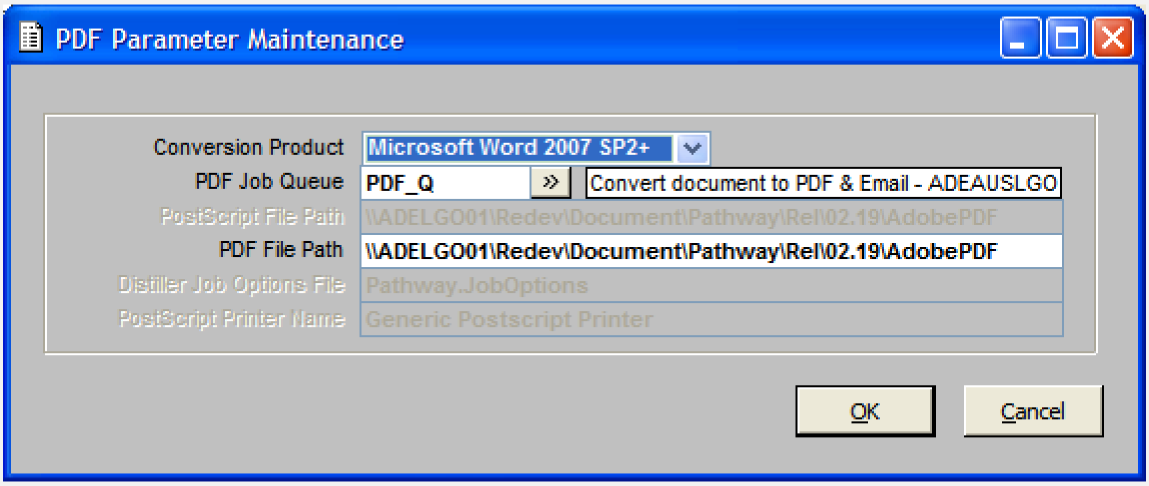


PostScript File Path: Location for temporary Postscript files.
PDF File Path: Location for PDF files.
Distiller Job Options File: Name of Job Options file created in 3.2
PostScript Printer Name: Name of Windows Postscript Printer exactly as it appears in the Printer Properties

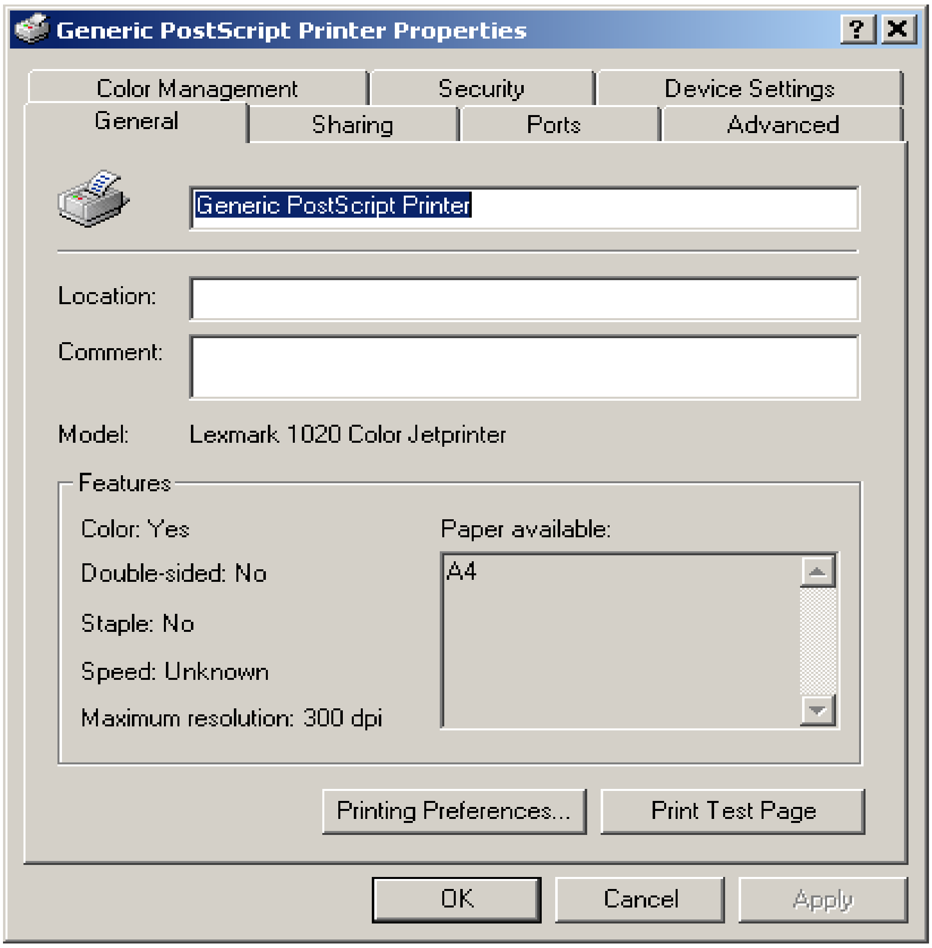
Using Microsoft Word 2007 SP2+ as the PDF Conversion Product

This form has been modified (in Release 3.06) to allow for the use of Microsoft Word 2007, rather than Adobe Acrobat Distiller, in the generation of PDF files for electronic document delivery. The "Acrobat Distiller Version" field has been effectively replaced by a "Conversion Product" drop-down field, and other fields have been rearranged slightly. The drop-down field contains two options; "Adobe Acrobat Distiller 5.0+" and "Microsoft Word 2007 SP2+". When the latter option is chosen, the "PostScript File Path", "Distiller Job Options File" and "PostScript Printer Name" fields are dimmed.

The PDF batch queue needs to be started, however, the machine running the PDF background job queue does not require Adobe Acrobat Distiller when the conversion product is set to "Microsoft Word 2007 SP2+". It is also not necessary to set up a PostScript printer driver, define a Distiller job options file, or reserve a directory for PostScript output files. However, Microsoft Word 2007 must be installed and updated to at least Service Pack 2. If for some reason it is not feasible to update Word to SP2, it is possible to achieve the same functionality by installing the free Microsoft "Save as PDF or XPS" add-in for Office 2007. Other pre-existing requirements for PDF generation also remain.



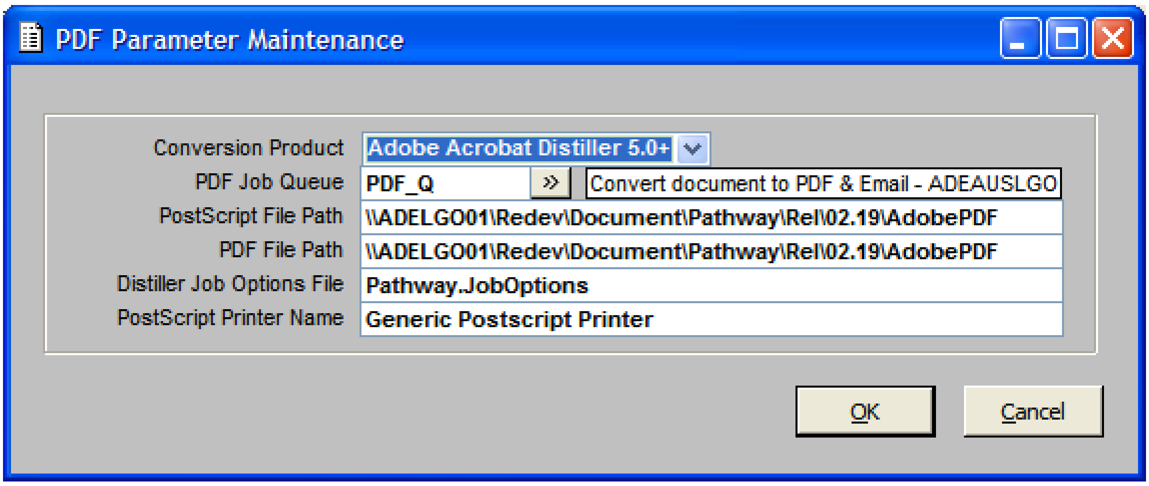
The screen below displays the Post Script Printer Properties.
These can be found on the appropriate PC using the Start – Settings – Printers Option and highlighting which is the Post Script Printer. Right clicking on the printer name and selecting properties will display the form below.



Acrobat Distiller Version:
PDF Job Queue Name: Job Queue created in 3.3.1

PDF Parameter Maintenance Form

This form shows the set up of the Pathway PDF parameters.



PDF Parameter Maintenance Form

Postscript File Path

This field contains the location for temporary Postscript files. (This path may include trailing backslash ('\') characters e.g. C:\TEMP\)

PDF File Path
This field contains the location for PDF files. (This path may include trailing backslash ('\') characters e.g. C:\TEMP\).)

Distiller Job Options File
This field contains the name of the Job Options file.

Postscript Printer Name
This field contains the name of the Windows Postscript Printer exactly as it appears in the Printer Properties.

Acrobat Distiller Version
This field contains the name of the Acrobat Distiller version.

PDF Job Queue

These fields enable a PDF Job Queue to be entered or selected via the Pop Up.

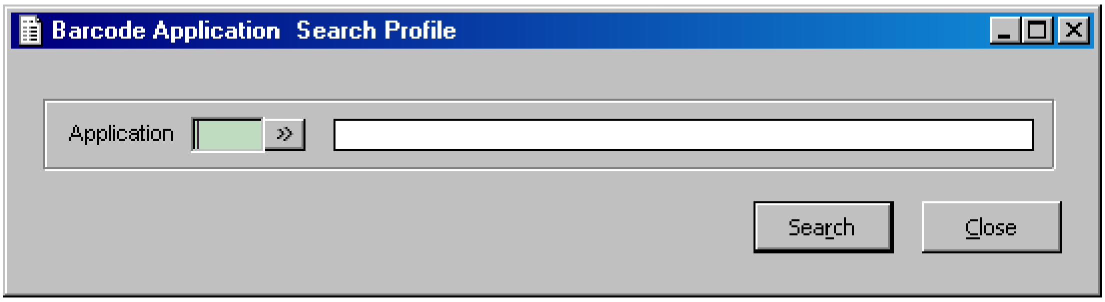
Barcode Maintenance

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

The Barcoding functionality is an authorised function. For sites that wish to purchase and utilise this function, an Access Code will be supplied. This will enable extraction of bar-coding details onto Word Processing interfaced documents.

Barcode Application Search Profile Form

The Barcode Search Profile allows the user to specify the Application for which the Barcode will be defined, i.e. Rates, Applications, Licensing etc.

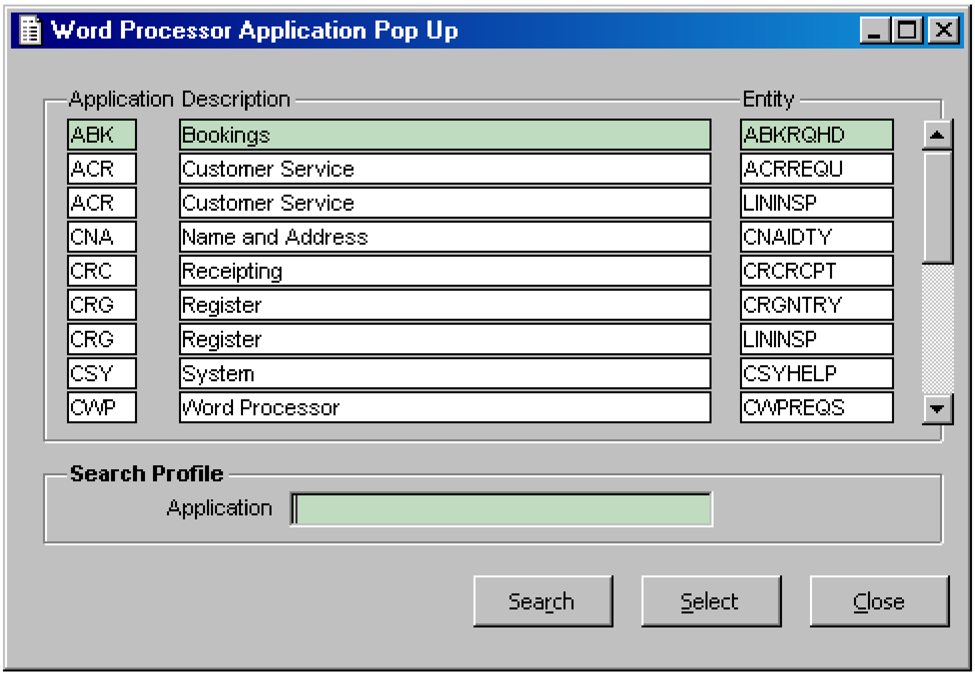


Barcode Application Search Profile Form

Enter the Application Code eg LRA or select from the Word Processor Application Pop Up form.

Word Processor Application Pop-Up form

The Word Processor Application Pop Up allows selection of the appropriate Word Processing Application.

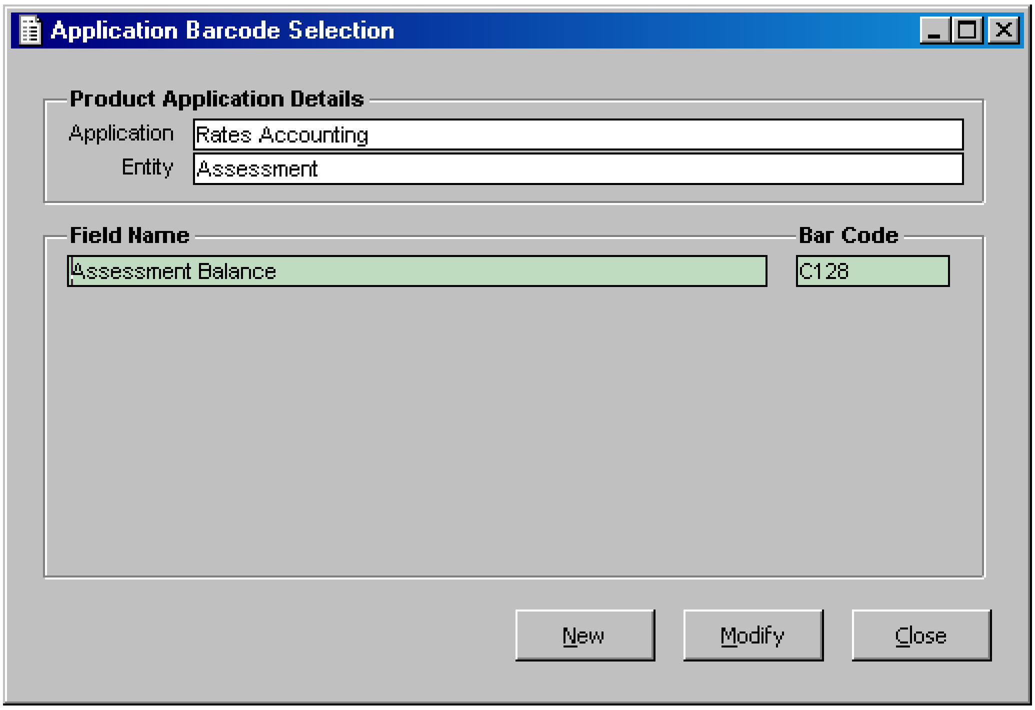


Work Processor Application Pop up Form

Highlight the required Pathway Module Record and click on Select. Alternatively, enter the Pathway Module code into the application field and click on Search to locate.

Barcode Selection Form

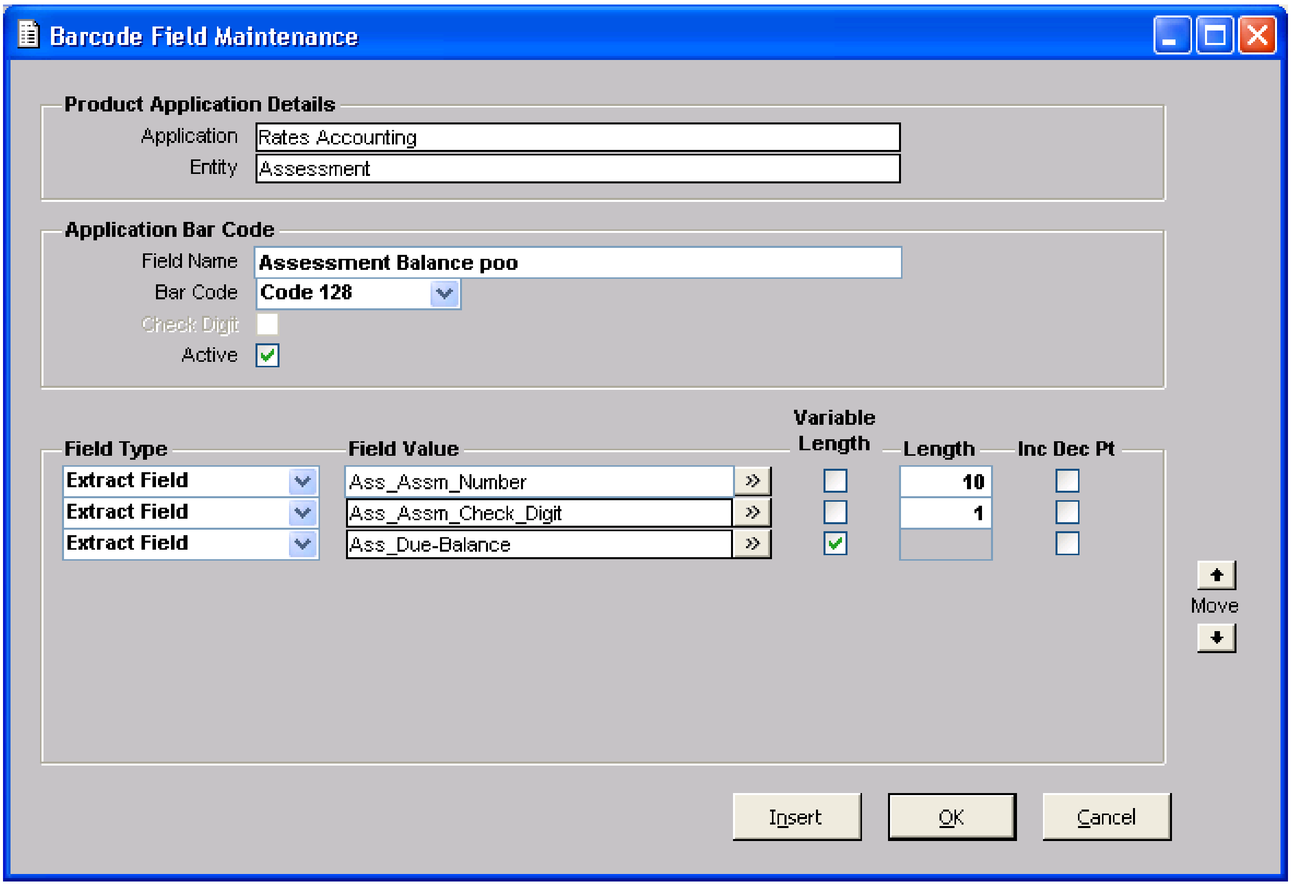
The Bar Code Selection form will allow the user to select a Bar Code to maintain or create a new one.



Application Barcode Selection Form

Barcode Field Maintenance Form

Barcode Field Maintenance will allow the customer to create the Barcode Field definition. One or many fields may make up one Bar-Code



Barcode Field MaintenanceForm

Application Bar Code
Enter a Field Name for your Application BarCode. The Fieldname that you create here becomes the name of the Merge Field that will be entered into your Merge Template. You will then assign the appropriate Font over this field in the Template document. In this instance, you would access the Merge Type Template, and insert the Merge Field 'Assessment Balance' wherever you wanted the BarCode to be printed.

Select a BarCode definition from the list of available options in the Drop Down. Available options include:

- Code 39
- Code 128

Where Code 39 is specified then the user is required to nominate whether a Check Digit is required, Code 128 always has a Check Digit.

Note: This is a Barcode Check Digit not Assessment Number check digit.

Insert
Use Insert to add additional fields to your Application BarCode. The Field Type will be selected from the available options in the drop down list. Available settings include

- Extract Field
- Text
- Special Character

The field Value is then dependent on the Field Type. Where 'Extract Field' is in use, use the popup to select from the list of available Pathway Extract fields eg,. Assessment Number, Check digit, Balance.

Where ‘Text’ is selected, enter the required Text,, in this instance the length will be populated based on the Text entered.

Where ‘Special Characters’ is selected, use the available popup to select from the list of pre-defined characters. These characters are defined in the following Menu Option. System Administration >> Word Processor Parameters >> Barcode Font Parameters.

The length that the field should be in the Barcode is also entered, Numeric Fields will have leading zeros added, and string fields will have spaces appended to meet the required length. Alternatively, the variable length option can be utilised where the resulting information can differ due to the inclusion of ‘-‘ or other notations in the Pathway information being extracted. Where checked on the Length field will no longer be maintainable.

Include Decimal Point (Inc Dec Pt) is also available, This would then allow amounts to be recorded with the decimal point in place – eg 120.00 instead of 120 or 12000 depending on how the data is stored in the Database.

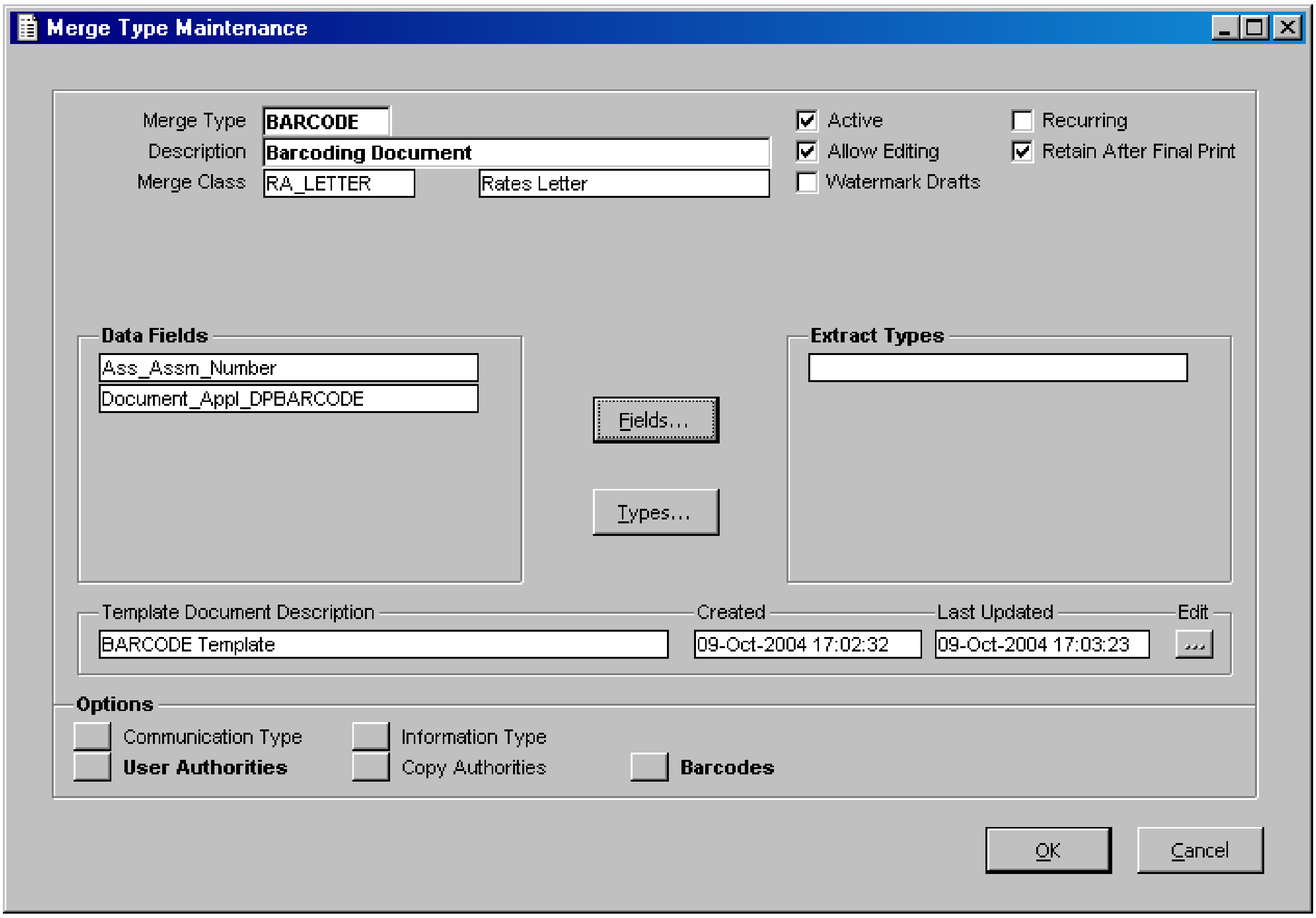
The example above will create an Australia Post Agency Barcode for Rates Payments.

Control Character defined by the user can be inserted in Code 128 Barcodes. Refer to Font Parameters on how to define Control characters.

Selecting Merge Type Barcodes

The Merge Type Maintenance form allows the selection of Barcodes to include in a Merge Type. (This field will only be available if authorised to the Barcoding functionality).

The Barcode Options button allows selection of Barcodes that can be included in the document. Click on the Barcode option to access the BarCode Selection Form and allocate the required Barcode for this Template. Where the Barcodes Text appears bolded, Barcodes have been assigned.

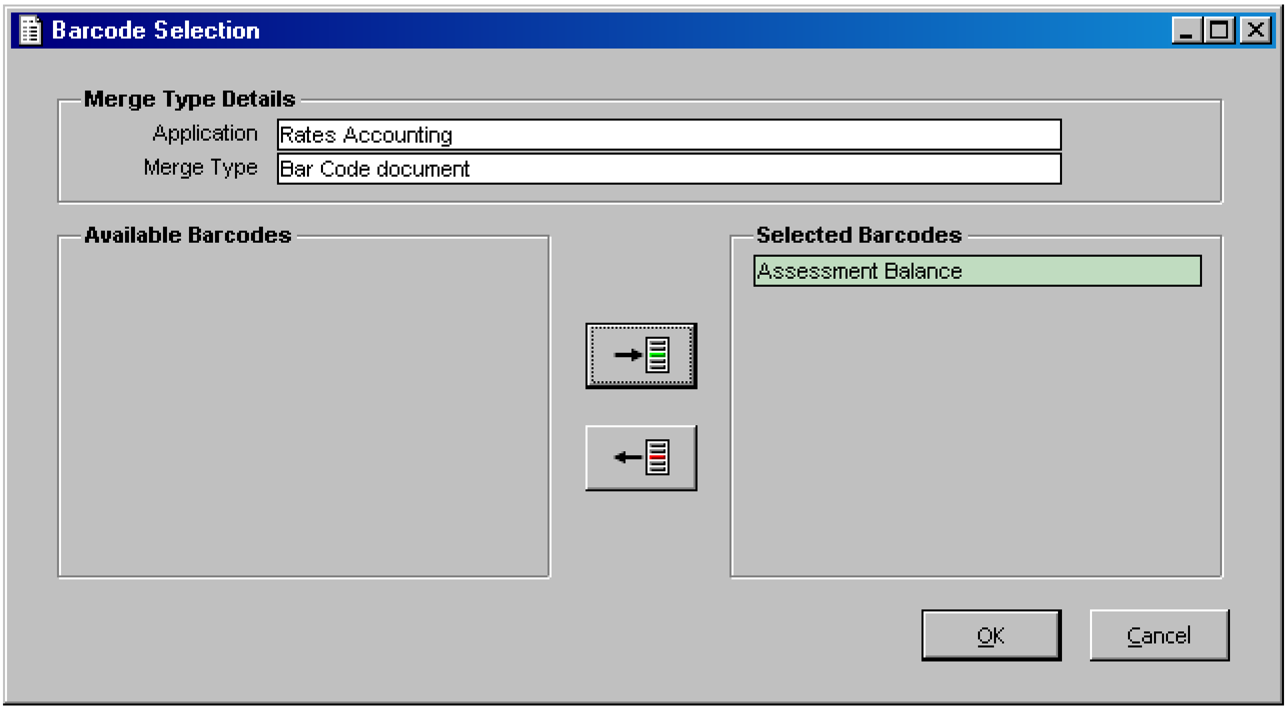


Merge Type Maintenance Form

The ‘Barcode field’ as defined in Barcode Maintenance, then needs to be included into your Merge Template Document and the appropriate FONT needs to be assigned to that Merge field.

Barcode Selection for Merge Type

The Barcode Selection form allows selected Barcodes to be included in the document.



Barcode Selection Form

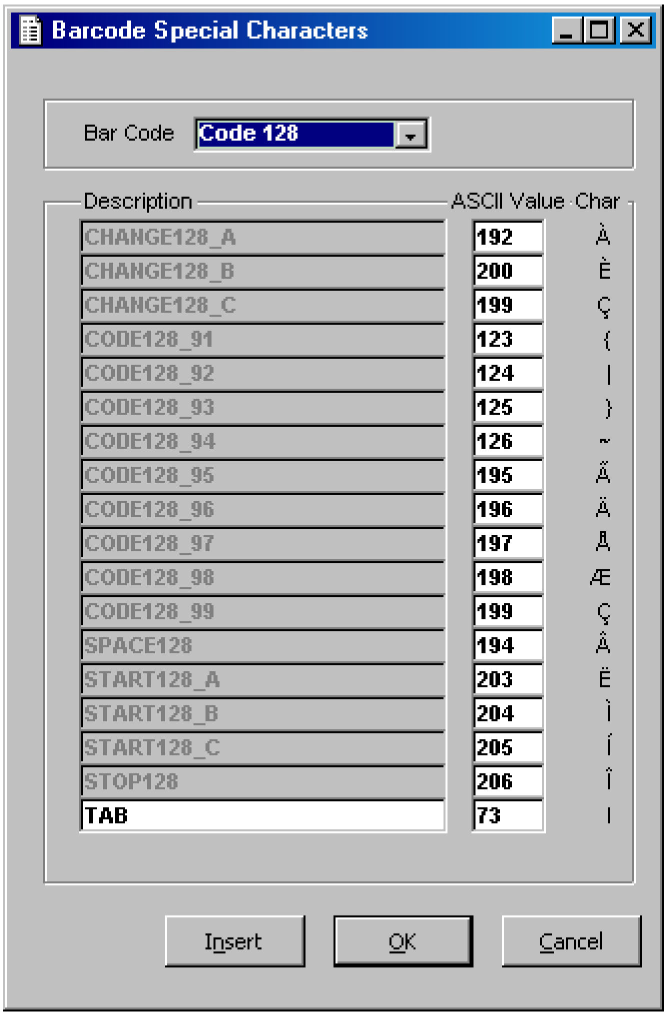
All available Barcodes for the selected Pathway Module will be displayed in the 'Available Barcodes' portion of this form. Move the required Barcodes for this Merge Document to the right hand side using the move buttons in the middle of the form or function key 2 (F2).

The selected Barcodes may then be included in the document. The appropriate Barcode Font should be applied to the field by council.

Barcode Font Parameters

Barcode Font Suppliers define the ASCII Characters used to represent the various Special Characters. The specifications for the font include the values which must be entered against each Special Character. Users can define additional Control Characters by entering the appropriate value from the Font Character Value specification.

The following form is accessed via System Administration>>System Parameters>>Word Processor Parameters>>Barcode Font Parameters.



Barcode Special Characters Form

Note: At this stage the only Barcode Fonts that have been tested by Infor are the IdAutomation and Azalea fonts. Both can be purchased online. Ref http://www.idautomation.com/fonts/ and http://www.azalea.com/. Generally, any Font should work as long as the special characters can be mapped as per the Pathway - Barcode Font Maintenance.

Sample C128 BAR-CODE Character Chart

IDAutomation Code 128 Barcode Font

Code A	Code B	Code C	ASCII *	Unicode *	Char *	Value		Code A	Code B	Code C	ASCII *	Unicode *	Char *	Value
Space	Space	00	**0194**	**00C2**	**Â**	00		V	V	54	0086	0056	V	54
!	!	01	0033	0021	!	01		W	W	55	0087	0057	W	55
"	"	02	0034	0022	"	02		X	X	56	0088	0058	X	56
#	#	03	0035	0023	#	03		Y	Y	57	0089	0059	Y	57
$	$	04	0036	0024	$	04		Z	Z	58	0090	005A	Z	58
%	%	05	0037	0025	%	05		[	[	59	0091	005B	[	59
&	&	06	0038	0026	&	06		\	\	60	0092	005C	\	60
'	'	07	0039	0027	'	07		]	]	61	0093	005D	]	61
(	(	08	0040	0028	(	08		^	^	62	0094	005E	^	62
)	)	09	0041	0029	)	09		_	_	63	0095	005F	_	63
*	*	10	0042	002A	*	10		nul	`	64	0096	0060	`	64
+	+	11	0043	002B	+	11		soh	a	65	0097	0061	a	65
,	,	12	0044	002C	,	12		stx	b	66	0098	0062	b	66
-	-	13	0045	002D	-	13		etx	c	67	0099	0063	c	67
.	.	14	0046	002E	.	14		eot	d	68	0100	0064	d	68
/	/	15	0047	002F	/	15		eno	e	69	0101	0065	e	69
0	0	16	0048	0030	0	16		ack	f	70	0102	0066	f	70
1	1	17	0049	0031	1	17		bel	g	71	0103	0067	g	71
2	2	18	0050	0032	2	18		bs	h	72	0104	0068	h	72
3	3	19	0051	0033	3	19		ht	i	73	0105	0069	i	73
4	4	20	0052	0034	4	20		lf	j	74	0106	006A	j	74
5	5	21	0053	0035	5	21		vt	k	75	0107	006B	k	75
6	6	22	0054	0036	6	22		ff	l	76	0108	006C	l	76
7	7	23	0055	0037	7	23		cr	m	77	0109	006D	m	77
8	8	24	0056	0038	8	24		s0	n	78	0110	006E	n	78
9	9	25	0057	0039	9	25		s1	o	79	0111	006F	o	79
:	:	26	0058	003A	:	26		dle	p	80	0112	0070	p	80
;	;	27	0059	003B	;	27		dc1	q	81	0113	0071	q	81
<	<	28	0060	003C	<	28		dc2	r	82	0114	0072	r	82
=	=	29	0061	003D	=	29		dc3	s	83	0115	0073	s	83
>	>	30	0062	003E	>	30		dc4	t	84	0116	0074	t	84
?	?	31	0063	003F	?	31		nak	u	85	0117	0075	u	85
@	@	32	0064	0040	@	32		syn	v	86	0118	0076	v	86
A	A	33	0065	0041	A	33		etb	w	87	0119	0077	w	87
B	B	34	0066	0042	B	34		can	x	88	0120	0078	x	88
C	C	35	0067	0043	C	35		em	y	89	0121	0079	y	89
D	D	36	0068	0044	D	36		sub	z	90	0122	007A	z	90
E	E	37	0069	0045	E	37		esc	{	91	0123	007B	{	91
F	F	38	0070	0046	F	38		fs	|	92	0124	007C	|	92

G	G	39	0071	0047	G	39		gs	}	93	0125	007D	}	93
H	H	40	0072	0048	H	40		rs	~	94	0126	007E	~	94
I	I	41	0073	0049	I	41		us	del	95	0195	00C3	Ã	95
J	J	42	0074	004A	J	42		fnc 3	fnc 3	96	0196	00C4	Ä	96
K	K	43	0075	004B	K	43		fnc 2	fnc2	97	0197	00C5	Å	97
L	L	44	0076	004C	L	44		Shift	Shift	98	0198	00C6	Æ	98
M	M	45	0077	004D	M	45		code C	code C	99	0199	00C7	Ç	99
N	N	46	0078	004E	N	46		code B	fnc 4	code B	0200	00C8	È	100
O	O	47	0079	004F	O	47		fnc 4	code A	code A	0201	00C9	É	101
P	P	48	0080	0050	P	48		fnc 1	fnc 1	fnc 1	0202	00CA	Ê	102
Q	Q	49	0081	0051	Q	49		Start A	Start A	Start A	0203	00CB	Ë	103
R	R	50	0082	0052	R	50		Start B	Start B	Start B	0204	00CC	Ì	104
S	S	51	0083	0053	S	51		Start C	Start C	Start C	0205	00CD	Í	105
T	T	52	0084	0054	T	52		Stop	Stop	Stop	0206	00CE	Î	
U	U	53	0085	0055	U	53								

Extract Types

The following topics are covered in this section:

Extract Field Maintenance

Application Role Type Field Extraction Maintenance Form

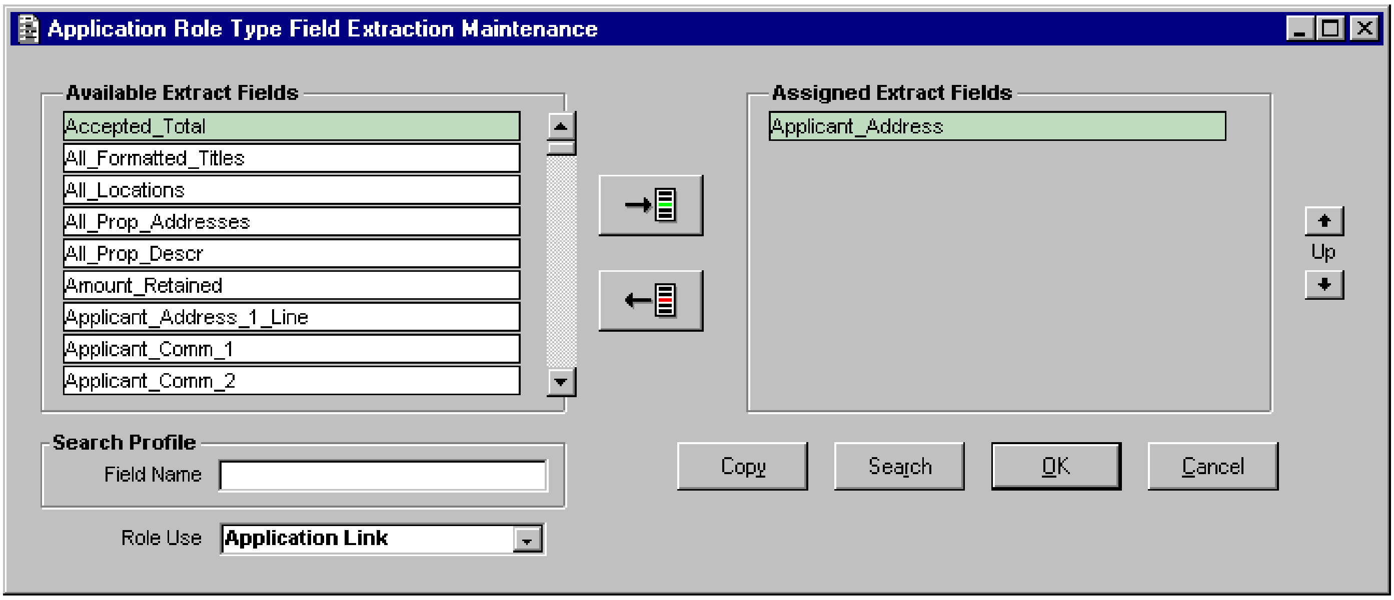
Registers allows the use of Extract Fields defined in Word Processing for extraction into the Register Report. This allows the user to determine what extra details are to be printed on the report when a link is made to another application within Pathway.

Further, the ability to select Extract Fields to display when module link details are viewed, can be determined by the user.

If Word Processing is in use then this form can also be used to define what fields from the Module are to be used in the Extract List within Word Processing.

To implement this feature within Registers, the following steps should be followed:

1. Access the Register Parameters menu option
2. Maintain a field that is a module field
3. The Module Detail Maintenance Form displays
4. Click on the Extract Button
5. The Application Role Type Field Extraction Form displays.



Application Role Type Field Maintenance Form

<u>Module Link fields and Extract Lists</u>

When defining a Register with Module Link fields to other Pathway Modules the Register Field Maintenance function will automatically create and maintain Word Processing Extract Lists for the related module. These extract lists will include all the fields from the Register (excluding 'Image Only' Field Types) and will enable the related module to incorporate data extracted from the Register Entries linked to the module.

These Extract Lists will be available for the user to create Extract Types based upon them within the related application modules.

For example:

If a Register has a Module Link field defined as a link to 'Customer Service'. Then the Customer Service Extract Type maintenance function will offer an Extract List in the popup which you may select to create an Extract Type. The Extract list will be named, "CRG_nnnn", where nnnn is a unique number. The Extract List description will be, "Register – xxxxxxx", where xxxxxxx will be up to 39 characters of the associated Register description.

When creating the Extract Type Template document all the fields from the Register will be available as Merge Fields for inclusion on the document. Three extra fields will be provided automatically on every Extract List. These will be the Register Code, Register Description and the Reference Number of the associated Register Entry for the extract.

These Extract Lists will be maintained for all Register Module Link fields, except where the relationship between the client application module and Registers is undefined within the Word Processing module. Currently these undefined types include 'Receipts', 'Property Streets' and 'Infringement Offences'. All other Module Link types are supported.

Note: Any changes to a Register may require any Extract Type Template documents to be reviewed. Extensive checking is performed by the Register Field Maintenance form and appropriate warning, or error messages will be shown as necessary.

Available Extract Fields
The Available Extract Fields are all the fields that are defined as Extract Fields in Word Processing for the module to which the field is linked.

Assigned Extract Fields
The Assigned Extract Fields are all the fields that have been selected for extraction for the field defined in Registers

Select Button
Select this button to move Extract fields from the Available side to the Assigned side.

Remove Button
Select this button to move Assigned fields back to the Available side.

Move Up/Move Down Buttons
Select these buttons to reorder the Assigned Extract fields.

Search Profile – Field Name
This field can be used to conduct a search on Available fields. This is useful when there are more than 9 fields available. Wildcard searching is available.

Role Use
The Role Use field indicates the use for which the fields have been selected. The options available from the drop-down list are:

- Application Link
- Report
- Extract List

Application Link indicates that fields have been selected to be displayed on line in Pathway when viewing details about the module link.

Report indicates that fields have been selected to be printed on the Register Report. This can be changed at the time of producing the report.

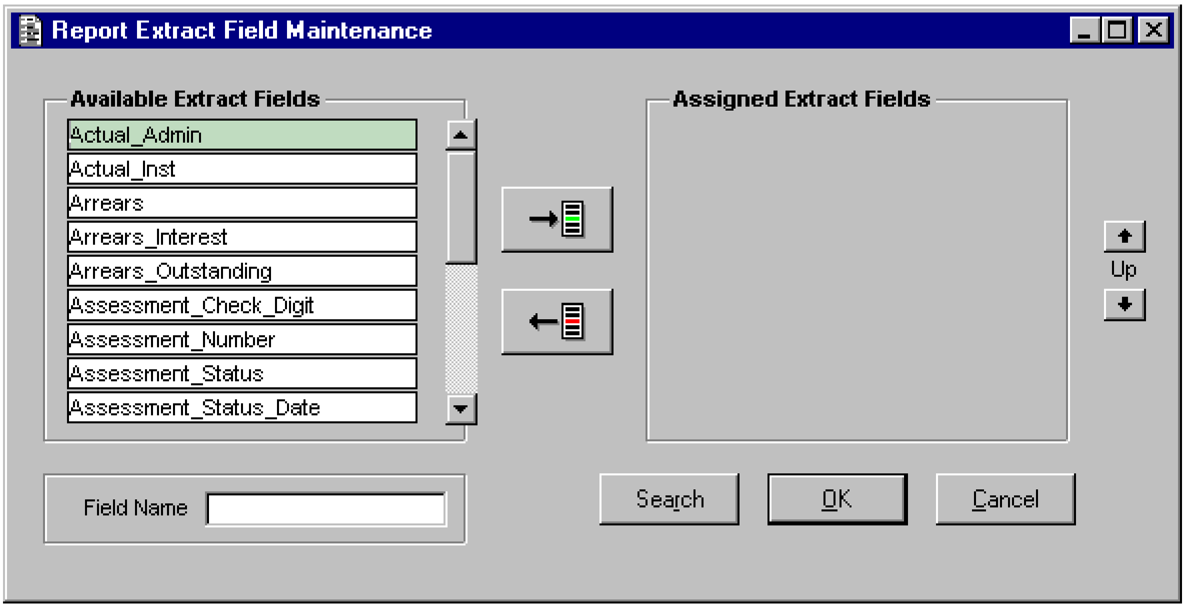
Extract List indicates the fields that have been selected to be used in an Extract List for Word Processing purposes.

Copy Button
The Copy Button allows the fields to be copied from one Role Use to another. The copy process does not remove fields that have already been selected but adds the fields that have not been selected for the Role Use that is being copied to.

The fields can be sequenced in the order that they are required to be displayed.

Once the parameter setting here has been done, the fields will now be used to display on the Module Link Maintenance Form, the Reporting Form and within the Extract Types form.

Report Extract Field Maintenance Form



Report Extract Field Maintenance Form

Available Extract Fields
The Available Extract Fields are all the fields that are defined as Extract Fields in Word Processing for the module to which the Field is linked.

Assigned Extract Fields
The Assigned Extract Fields are all the fields that have been selected for extraction for the field defined in Registers.

The form displays all the fields that were selected at the parameter level for the report on the Assigned Extract Fields column. The user may change the fields that have been selected to be printed on the report. Changing the fields at this time will not affect the parameter setting.

Note: If there are many fields selected there will be an impact on the performance of the Register Report.

Select Button
Selecting this button allows the selected Available Extract field to be moved to the Assigned Extract Fields side.

Remove Button
Selecting this button allows the selected Assigned Extract Field to be moved back to the Available Extract Field side.

Move Up/Move Down Buttons
The Move Buttons allow the reordering of The Assigned Extract Fields.

Field Name
This field allows a search profile to be entered for searching on Available Extract Fields. This is useful when there are more than 9 fields. Wildcard searching is available.

Extract Type Maintenance

This section describes the establishment of Extract Type Parameters. Extract Types represent lists of data that can be included into a requested document.

For example : Lists of Property Conditions. Lists of Building Applications.

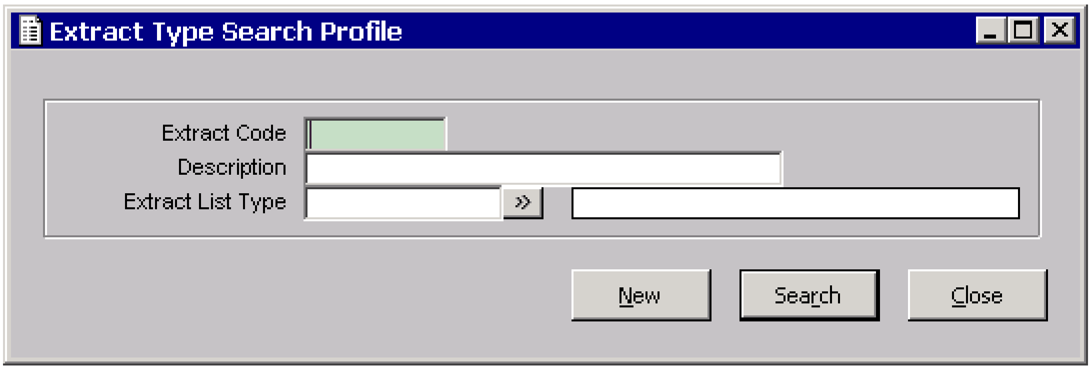
For each Extract Type, the Layout and Filtering criteria that apply are defined. Extract Types are not utilised when producing Name and Address Labels, but are available for all other Application modules.

The Extract Type Selection process enables the creation and modification of Extract Types. A search process enables records requiring modification to be easily identified.

Extract Type Search Profile Form

The Extract Type Search Profile Form enables you to create a new Extract Type or select all Extract Types matching a certain criteria. The extraction of existing Extract Types requires the entry of a search criteria and use of the Search Button.

(Refer to the How to Use reference guide for further information regarding Advanced search profile techniques).



Extract Type Search Profile Form

Extract Code
Enter an Extract Code on which to base your search and use the Search Button to initiate the search.

Wildcard searching is available.
For example: P* will extract all Extract Types with an Extract Code starting with P.

Description
Enter a Description on which to base your search and use the Search Button to initiate the search.

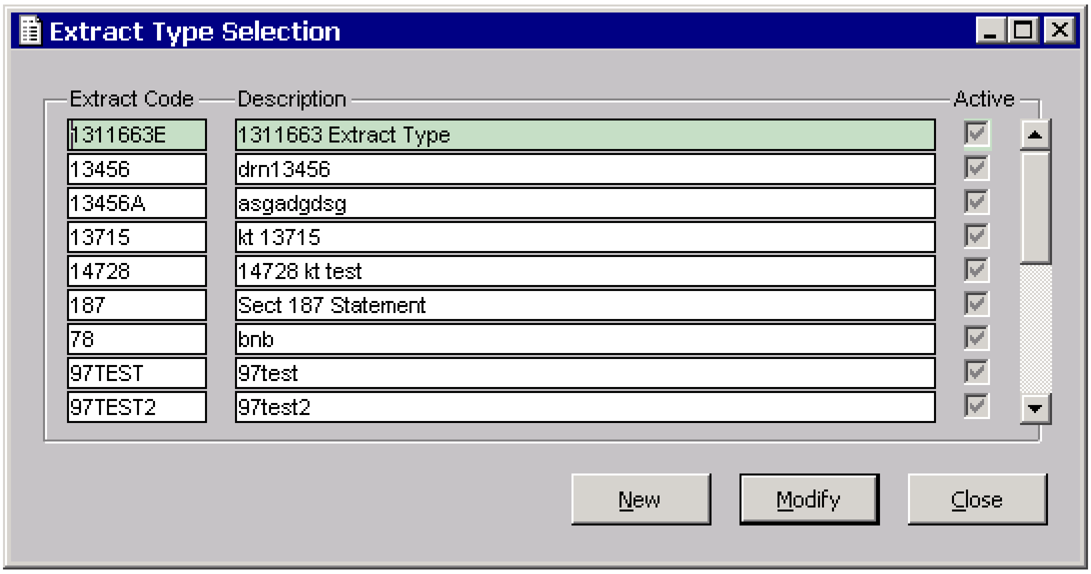
Wildcard searching is available.
For Example: Property* will extract all Extract Types with a Description starting with Property.

Extract List Type

This field allows an Extract Type to be entered or selected from the Pop up. It allows users to find all Extract Types that are based on a particular Extract List definition.

Extract Type Selection Form

The Extract Type Selection Form will display where the search criteria matches more than one Extract Type. From this Form you may create a new Extract Type or select one of the listed Extract Types for modification.



Extract Type Selection Form

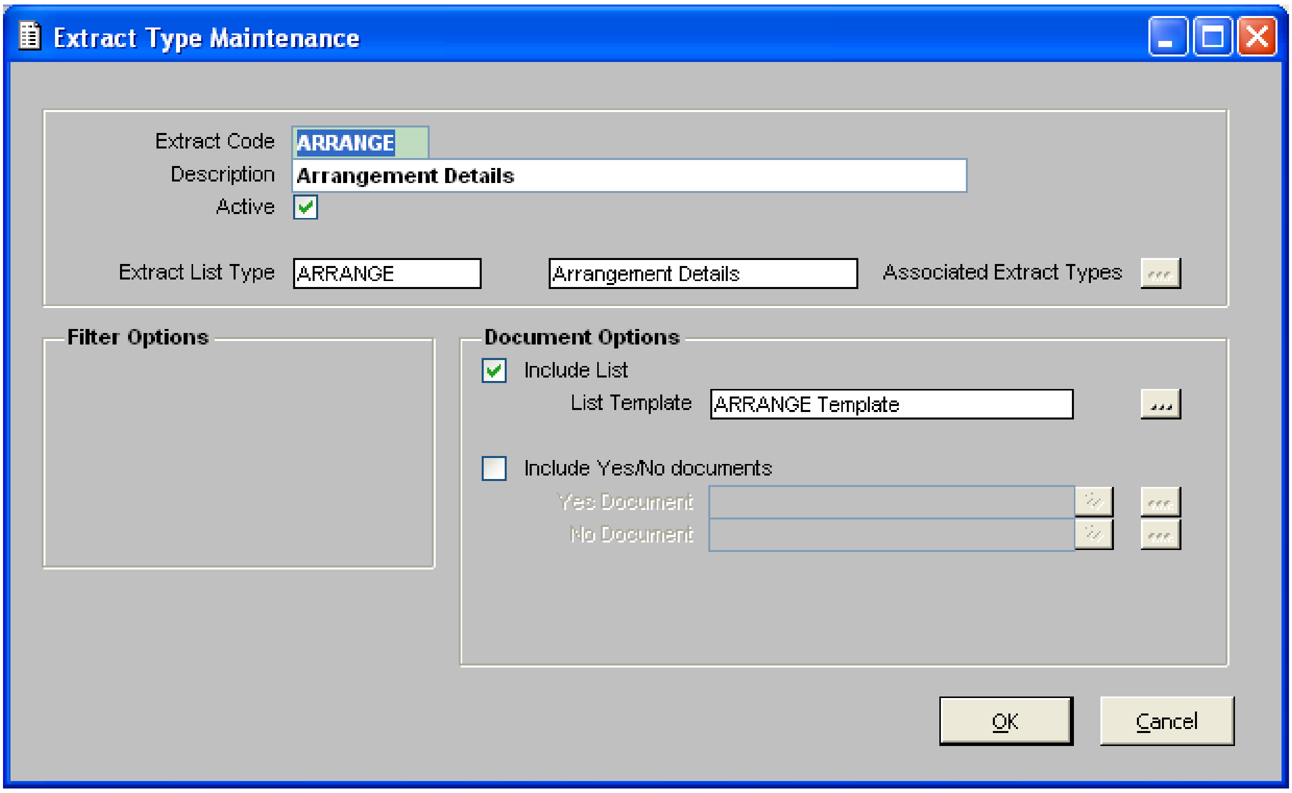
Extract Code
The Extract Codes are displayed for each Extract Type identified by the search criteria. Click on an Extract Type and select the Modify Button to amend an Extract Type

Description
A further Description of each Extract code is displayed for each Extract Type identified by the search profile.

Active
If the Active checkbox is checked on, the Extract Type can be included within a Merge Type Document. If the checkbox is checked off, the Extract Type is no longer available to be incorporated into the Merge Type Documents. This flag is not able to be modified on this form. To change this flag, select an Extract Type and select the Modify Button.

Extract Type Maintenance Form

Extract Types and their associated Documents can be created or modified from this Form. Extract Types may be deleted if the Documents have not yet been utilised in a Document Request process.



Extract Type Maintenance Form

The Extract Type Maintenance Form is used to define the following details in relation to an Extract Type.

- The Extract Code and Description and the related Extract List Type. The Extract List Types are system defined and can be selected from the Pop-Up Form.
- The Filter options for the Extract Type. These options will vary depending on the Extract List Type that is selected. For example : An Extract List Type of ALLCONDS allows filter on the Status and Condition Code, while an Extract List of LUSELIST only has a Status filter.
- The nominated List Template Document and optional YES/NO Documents for the Extract Type are defined. Entry into the available Word Processor product is available from this Form to enable the creation or modification of these Documents

Text Only Extract (Includes No Merge Fields)

(This is an Authorised Function)

Pathway Word Processing has been enhanced to provide the ability to create a ‘Text’ only extract type that does not include any specific data extracts from Pathway. This allows Council to create ‘Text’ only Extract Types for each lot of static wording they require and, if at some time in the future that wording needs to be amended, will allow the changes to be made on the one Extract Type rather than Council potentially having to amend many extract types.

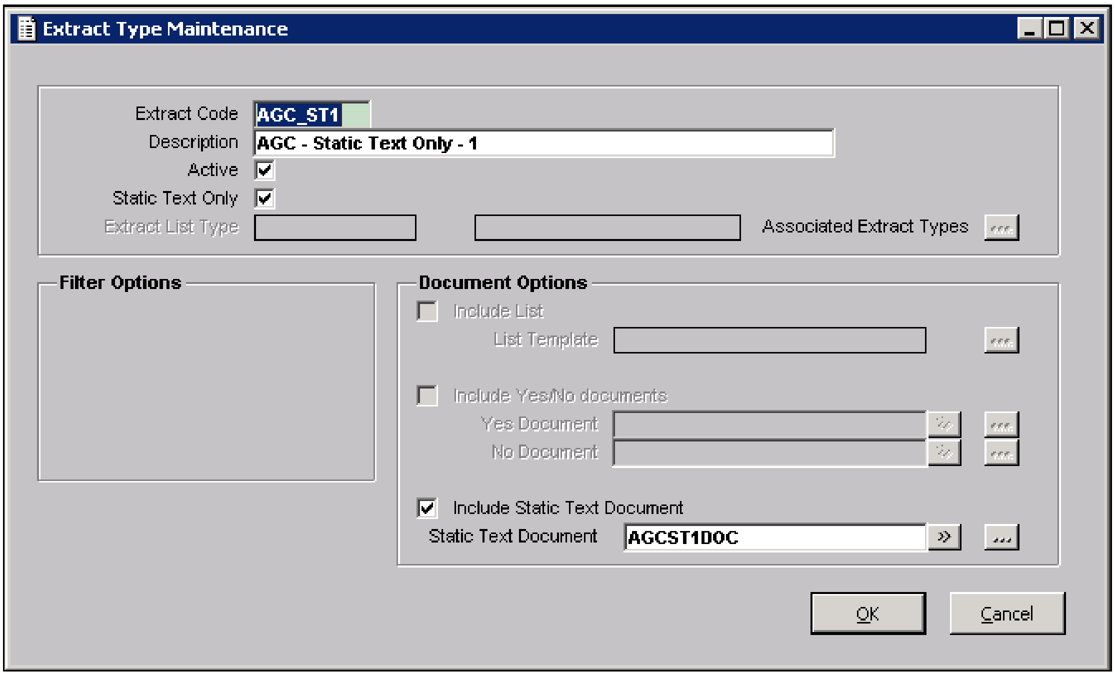
Separate ‘Text’ only Extract Types can be created for each module and one or more of these ‘Text’ only Extract Types can be added to any Merge Type in that module if required. This will allow Council to add any static wording they need to any document they produce.

NOTE: Access to this new functionality will be governed by a new CWP Authorised Function called ‘Static Text Extract’

Extract Type Maintenance

The Extract Type Maintenance form has been modified to add new fields that will allow an Extract Type to be defined as a ‘Static Text Only’ extract.

NOTE The new fields shown/detailed below will not be visible or accessible if the site is not authorised to use the new Authorised Function ‘Static Text Extract’



Extract Type Maintenance form showing Static Text fields

Merge Type Maintenance

No changes have been made to Merge Type Maintenance. Extract Types are selected in exactly the same way regardless of whether they are ‘Static Text Only’ or ‘normal’ extracts.

When the document template is created, it will automatically insert an Include Statement for the selected Extract Types, again, – regardless of whether they are ‘Static Text Only’ or ‘normal’ extracts.

Extract Code
The Extract Code is an 8 character alpha numeric field that uniquely identifies each Extract Type.
This field is mandatory when entering a new Extract Type.

Description
The Description field gives further information regarding the Extract Type. This field is mandatory when entering a new Extract Type.

Active
If the Active checkbox is checked on, the Extract Type can be included within a Merge Type Document. If the checkbox is checked off, the Extract Type is no longer available to be incorporated into the Merge Type Documents.

Static Text Only (Authorised)
This checkbox denotes whether or not the Extract Type is a ‘Static Text Only’ extract.
This field and the Extract List Type field are mutually exclusive i.e. either Static Text Only can be checked on or an Extract List Type can be nominated – but not both.

If checked OFF
Denotes that this is not a ‘Static Text Only’ extract.
The user must nominate an Extract List Type (etc.)as per previously existing functionality.
Access to the following is not allowed and all the fields involved are dimmed:-

- Include Static Text Document

- Static Text Document
- Static Text Document Popup [>>]
- Static Text Document Detail field […]

If checked ON
Denotes that this is a 'Static Text Only' extract
Access to the following is not allowed and all the fields involved are dimmed:-

- Extract List Type
- Associated Extract Types
- Include List Document
- Include Yes/No Documents
- Any Filter Options
- Access to the following is allowed:-
- Include Static Text Document (** see below)

Extract List Type

The Extract List Type determines what Data Extract fields can be included in the Extract Type List Template Document. These Data Extract fields are system defined along with the Extract List Types themselves.

For Example: If a list of Property Conditions is required, an Extract List type of ALLCONDS could be selected. The Extract List Type Pop Up button can be used to get a list of available Extract List Types.

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

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

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

Associated Extract Types - Detail Button
Selection of the Detail Button displays the Associated Extract Types Form. This button will only become available when certain Extract Lists are selected. It allows for other Extracts, which would have been previously created, to be associated with your Extract. Only one Extract Type may be assigned as an Associated Extract, (except in the Property module with the ALLAPPL and APLICTNS Extract Lists where more than one Associated Extract Type is allowed.)

Note: Multilevel association of Extract Lists is not available, i.e. the Extract List of ALLAPPL can have an Associated Extract List of INSPECT. The INSPECT Extract List can have an Associated Extract List of NOTES. However, if the INSPECT Extract List is associated with the ALLAPPL Extract List it cannot have the NOTES Extract List associated to it.

Filter Options
Depending on which Extract List Type is selected other filter options may be available.

These include;

- Condition Code
- Application Class
- Consent Code
- Grouping Code

When the Extract is assigned to a Merge Type the filter will only retrieve the requested data that matches the filter.

Include List
If the Include List checkbox is Active, a List Template document can be created. This checkbox is defaulted to Active when creating a new Extract Type.

List Template
This field contains the description of the List Template Document. Click on the Edit Document button to create or modify the Template via the relevant Word Processor package.
Refer to your Word Processor Manuals for further assistance in Creating the Document, inserting Merge fields and Include Statements.

Edit Document Button
By pressing this button, the List Template or Yes/No Documents can be created or modified via the relevant Word Processor package.

Refer to your Word Processor Manuals for further assistance in Creating the Document, inserting Merge Fields and Include Statements.

Include Yes/No Document
If the Include Yes/No Document checkbox is checked as Active, then Yes/No Documents may be created via the relevant Word Processor package.

Yes/No Document
This field contains the description of the Yes/No documents.

The Yes/No Documents, if specified, will indicate that the type of data being extracted does exist (Yes Document) or does not exist (No Document) and therefore these Documents are usually text only.

For example :
In the case of Property conditions extract, the YES document may be
" The following property conditions will apply"
If no Property conditions are found, the NO document may be
"No property conditions are applicable"
If a new Yes or No Document description is entered, the following message will be received to confirm that a new Document is required.

To create a new document type a new name in the 'Yes Document' or 'No document' field then click on the Edit Document button to create the (new) Document.

To modify an existing document, click on the Edit Document button and select the required document from the list. i.e. The Yes/No Document Pop Up button can be used to initiate the Document Pop Up Form to give a list of existing Yes/No Documents available for selection.

Additional Filter Button

Selecting this button will take you to the Filter Maintenance Form. This filter button will only be displayed if a filter can be added to the Extract Type.

Note: This is currently only available for the following Extract Lists:
AFFPROP Groups of Affected properties
APPDIMS Application Dimensions

MISCDATA	Miscellaneous Data
NAMES	Application Names/Roles
BLDCLASS	Building Classifications
FEES	Application/Contribution Fees
RECEIPTS	Application Receipts
BCDIMS	Building Classification Dimensions
CONSENTS	Application Consents
DECISION	Application Decisions
DEVDIMS	Development Decisions
INSPECT	Inspections
LANDUSE	Land Uses
MAJMIN	Major and Minor Categories
PARCPLAN	Plans on a Parcel
PERMCERT	Permits and Certificates
PLANCOND	Conditions on a Plan
PLPACOND	Conditions on a Plan on a Parcel
PROPPLAN	Plans on a Property
SUBDIMS	Subdivision Dimensions
ZONELIST	Zones on a Property

All Customer Service Extract Lists (as well as Request Note Extract Security Level Filter)

Additional Filter Form

The Filter Maintenance form allows you to define an additional filter for the Extract Type. Depending on the Extract List Type selected, this will determine which Additional Filter Form is displayed when the Additional Filter button is pressed. Examples of each form are below:-

Include Static Text Document (Authorised)

This new checkbox is only available if ‘Static Text Only’ is checked ON.

If checked OFF
Access to the following fields is not allowed and the fields are dimmed:-

- Static Text Document
- Static Text Document Popup [>>]
- Static Text Document Detail field […]

If checked ON
Access to the following fields is allowed:-

- Static Text Document
- Static Text Document Popup [>>]
- Static Text Document Detail field […]

Static Text Document (Authorised)

This new field is only available if ‘Include Static Text Document’ is checked ON.

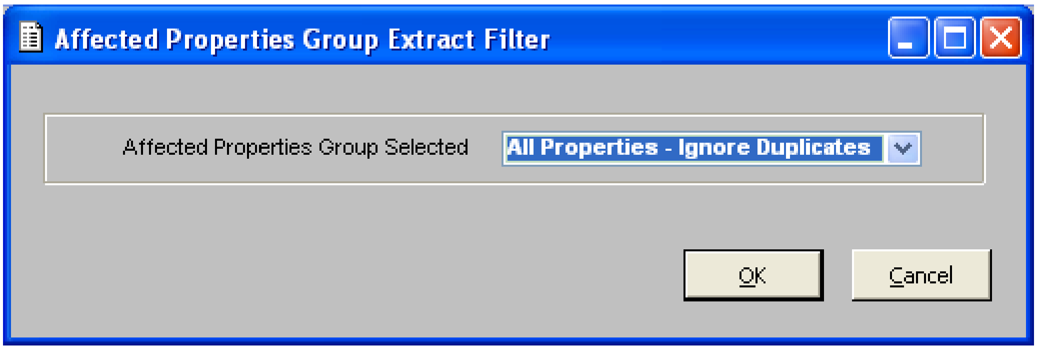
If you wish to create a new document, enter the name of the Static Text Document you wish to define and then select the Popup or Datail button. Answer ‘Yes’ to the question and a blank document will be presented.

If you wish to select an existing Static document, use the Popup to select one from the list of pre-defined Static Text Documents.

Use the Popup to select a pre-defined Static Text Document

The Detail button calls Word Processing to allow entry/maintenance of the static text document template.

Affected Properties Group Extract Filter

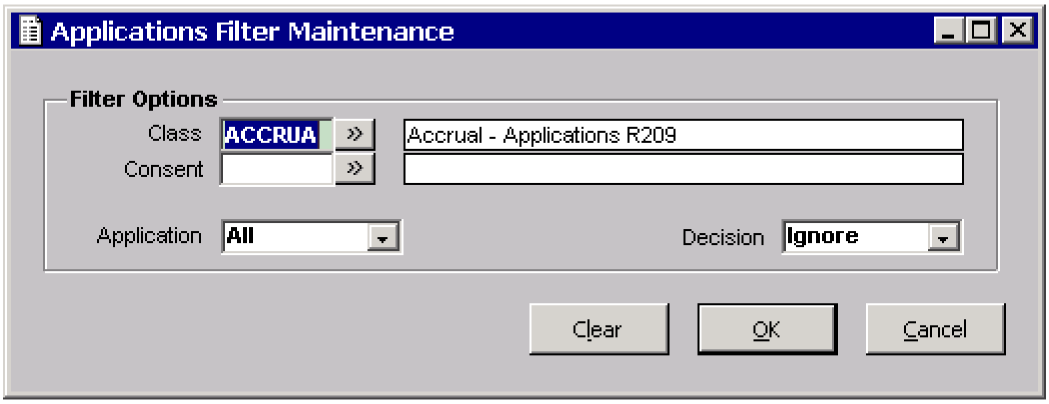


Affected Properties Group Extract Filter

Affected properties Group Selected

Latest Group = All Properties in the latest modified group to be extracted.
All Properties – All Groups = All Affected Properties to be extracted as currently done;
All Properties – Ignore Duplicates = As the above with duplicated record to be ignored;
Current Group = All Properties in the "Current" group to be extracted.

Applications Filter Maintenance



Applications Filter Maintenance Form

Class

Cick the Pop Up Button to select a Class from the Pop Up Form.

Consent

Cick the Pop Up Button to select a Consent from the Pop Up Form.

Application

There are 3 Options to choose from:-

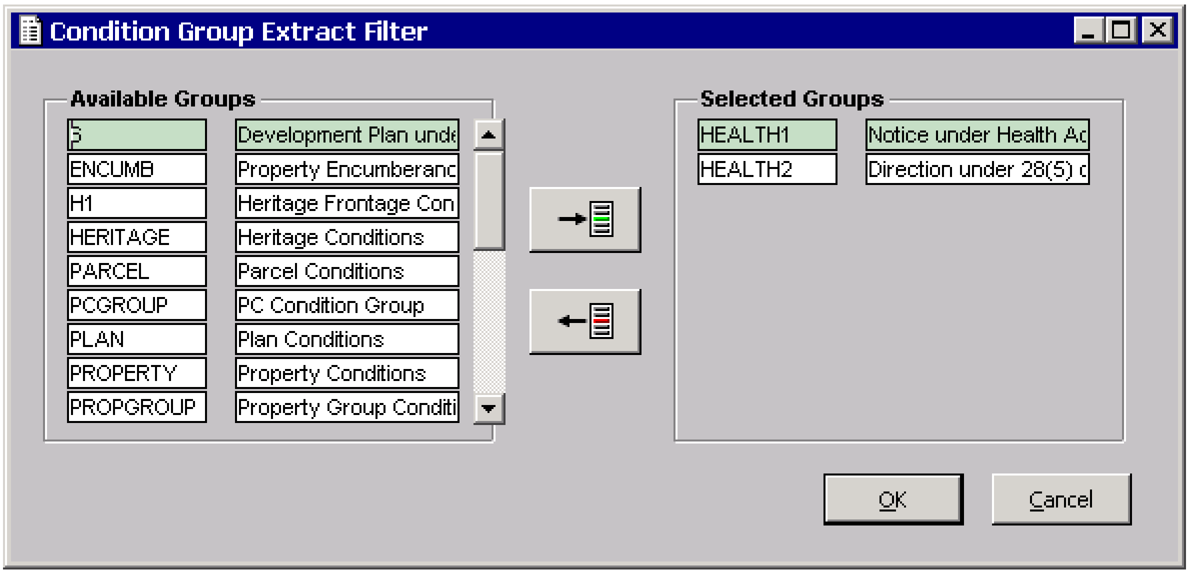
- All
- Expired
- Not Expired

Decision

There are 6 Options to choose from:-

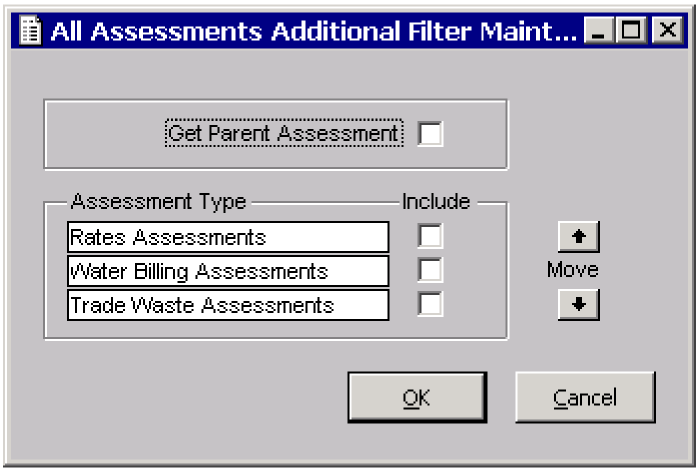
- Approval
- Rejection
- Neither
- All
- None
- Ignore

Clear Button
Click on this button to Clear the form of any search criteria.



Condition Group Extract Filter Form

All Assessments Additional Filter Maintenance



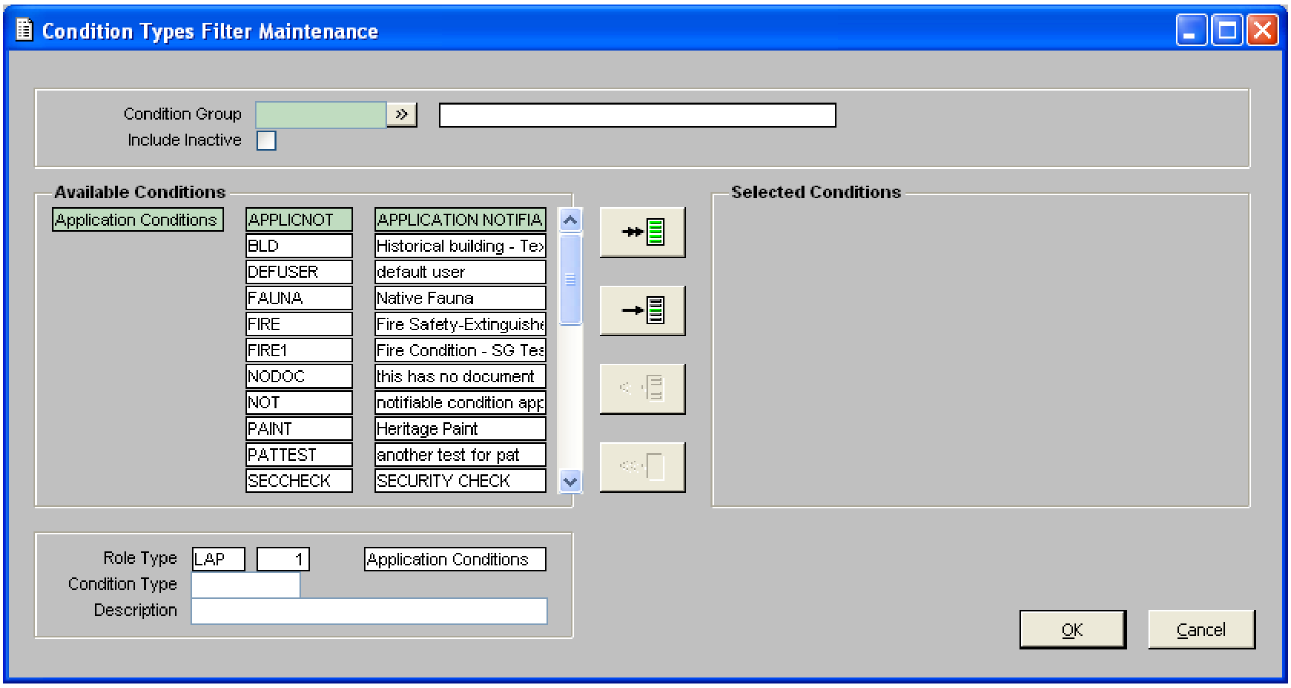
All Assessments Additional Filter Maintenance Form

Get Parent Assessment
Tick on this checkbox if the Parent Assessment is required for the Extract Type.

Assessment Type
This field describes the types of assessments available. Please Note that Rates Assessments includes Special Rates & Charges Assessments.

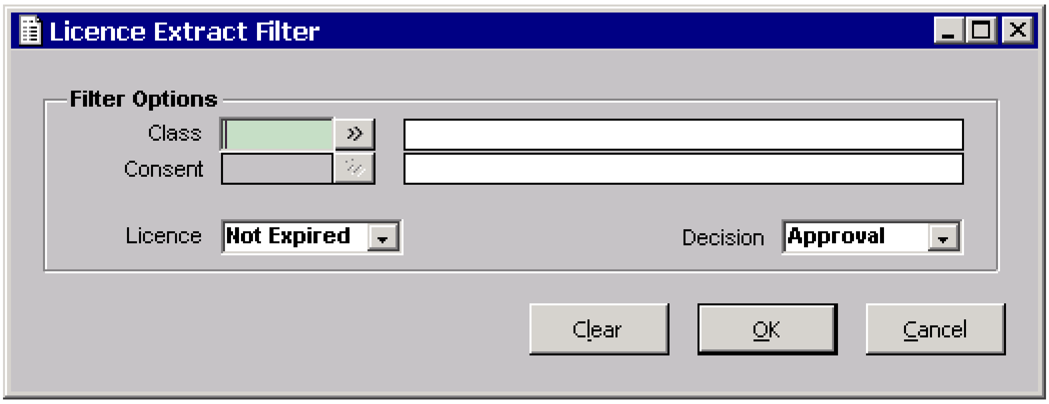
Include Checkbox
Tick on this checkbox if that particular assessment type is to be included for the Extract Type. Please Note that ticking on Rates Assessments will include Special Rates & Charges Assessments in the Extract Type.

Condition Types Filter Maintenance



Condition Types Filter Maintenance Form

Licence Extract Filter



Licence Extract Filter Form

Class

Cick the Pop Up Button to select a Class from the Pop Up Form.

Consent

Cick the Pop Up Button to select a Consent from the Pop Up Form.

Application

There are 3 Options to choose from:-

- All
- Expired
- Not Expired

Decision

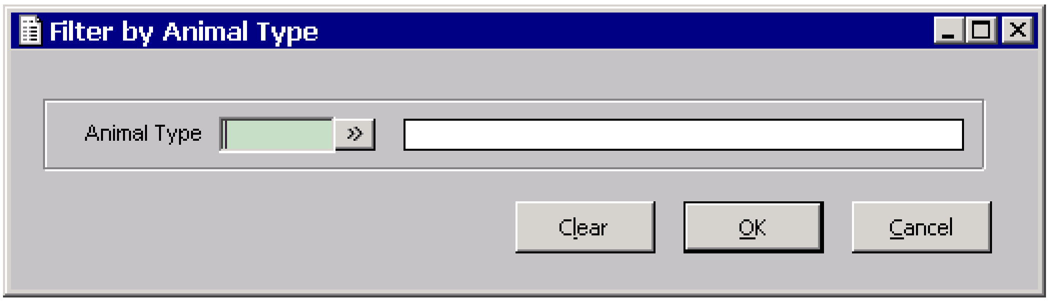
There are 6 Options to choose from:-

- Approval
- Rejection
- Neither
- All

- None
- Ignore

Clear Button
Click on this button to Clear the form of any search criteria.

Filter by Animal Type

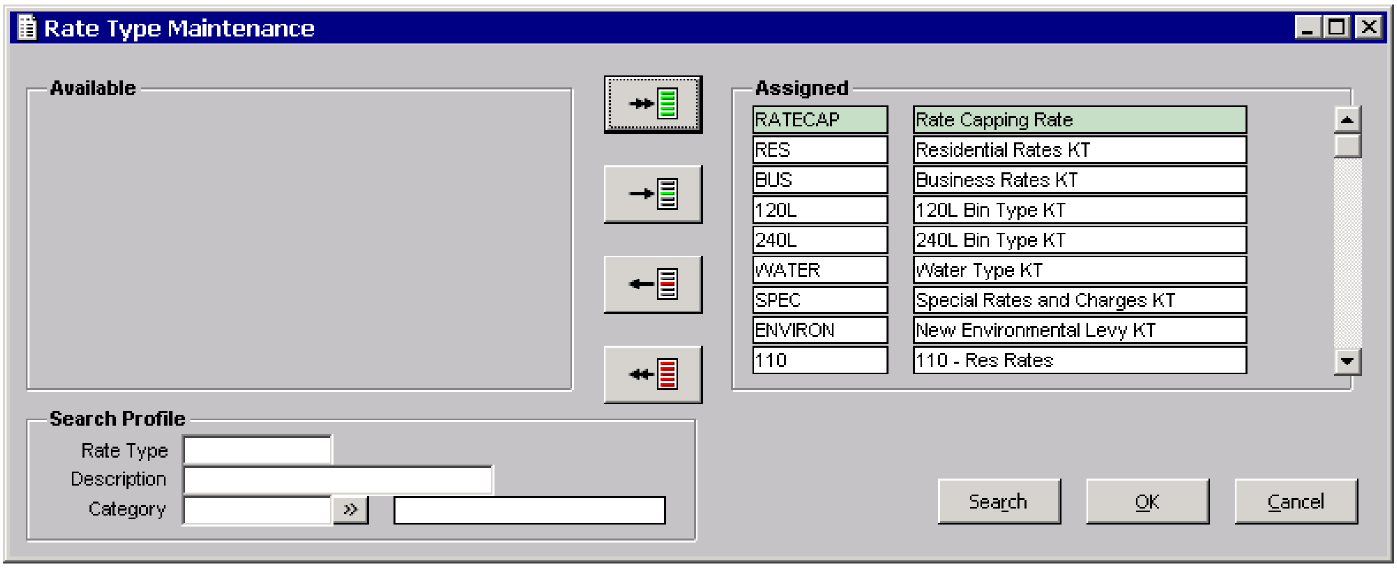


Filter by Animal Type Form

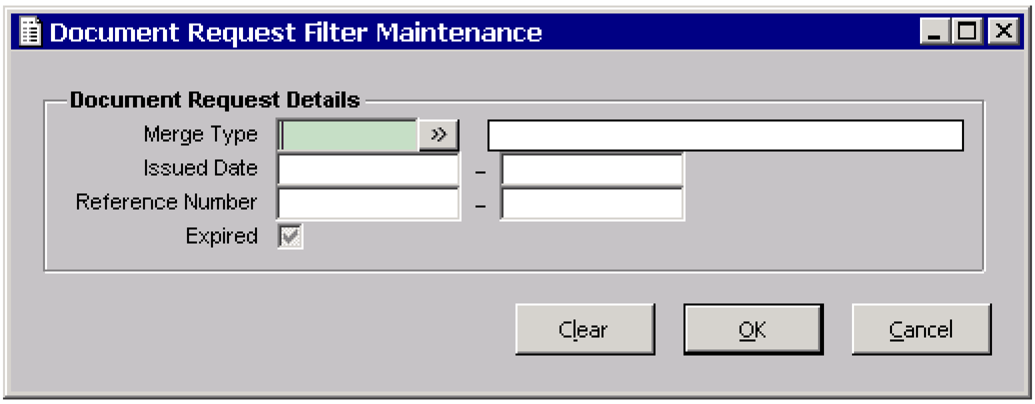
Animal Type

Cick the Pop Up Button to select an Animal Type from the Pop Up Form.

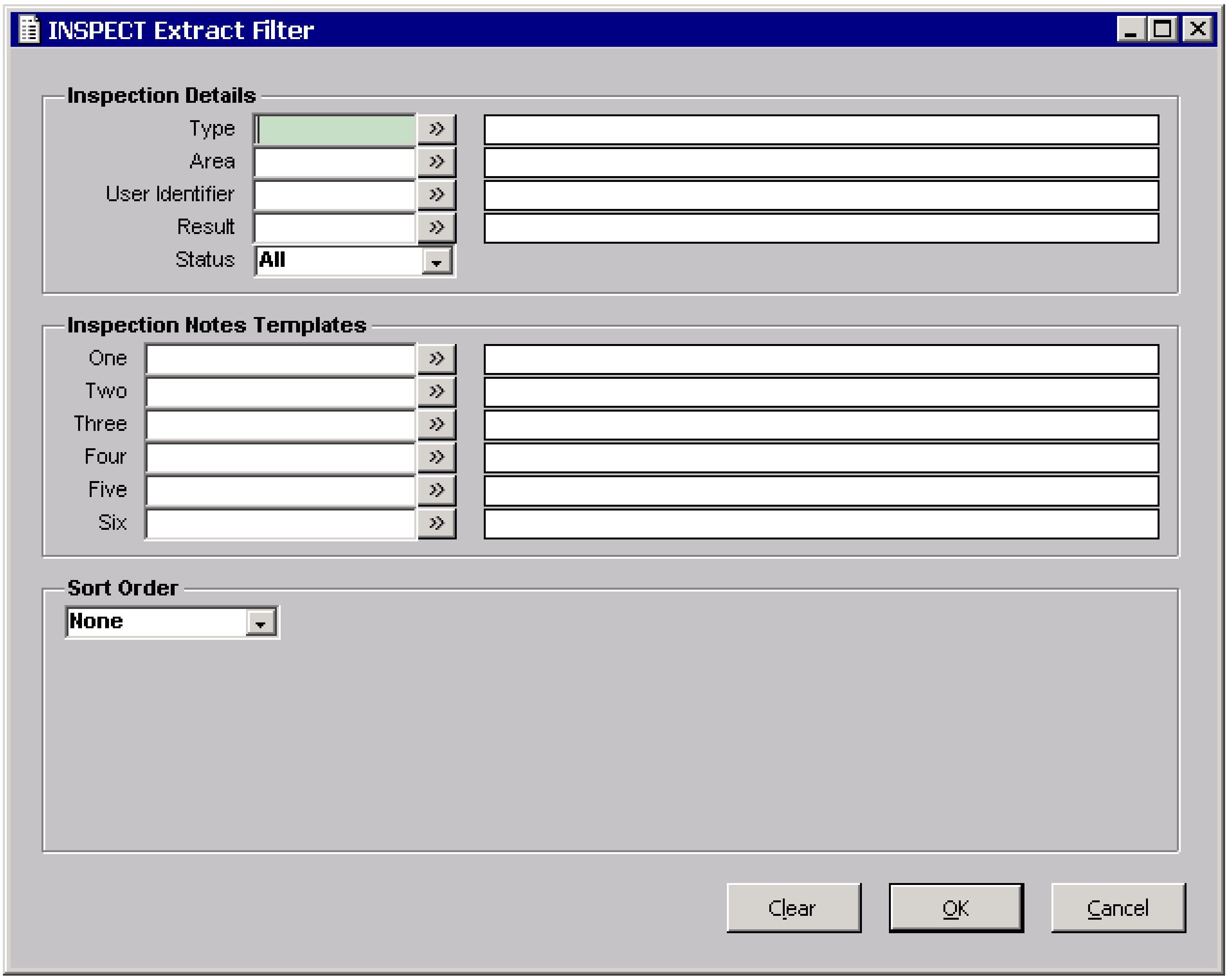
Clear Button
Click on this button to Clear the form of any search criteria.



Rate Type Maintenance Form

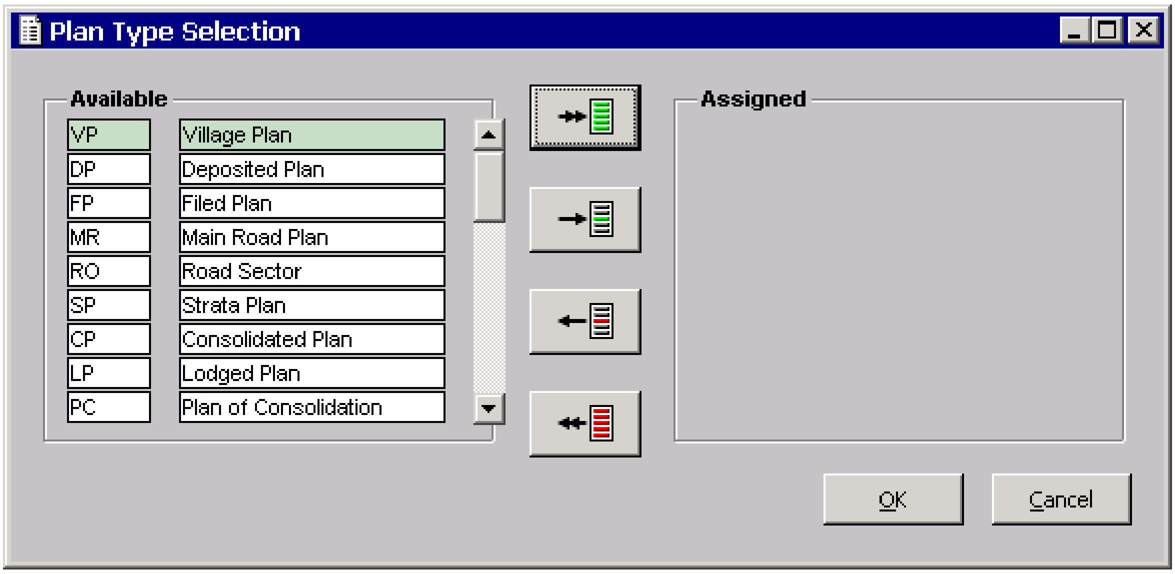


Document Request Filter Maintenance Form



Inspect Extract Filter Form

Plan Type Selection



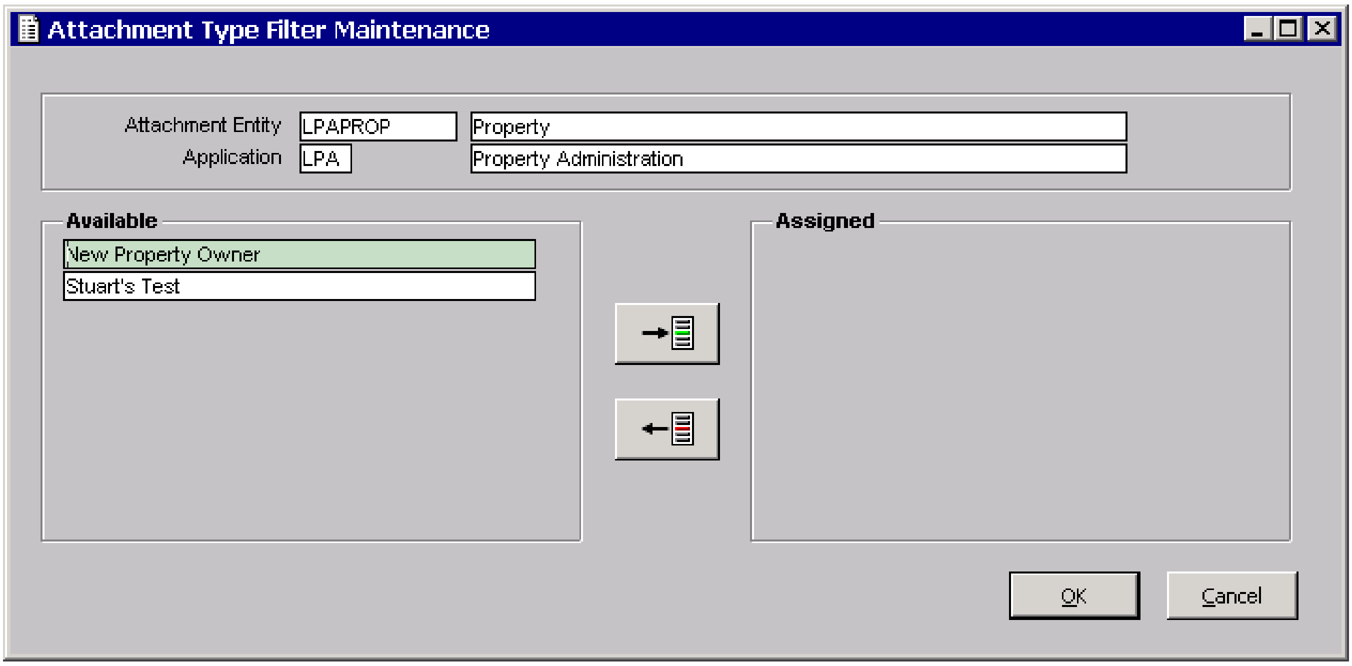
Plan Type Selection Form

Available

The records on this side are currently not selected, and therefore will not be considered when using this Extract Type.

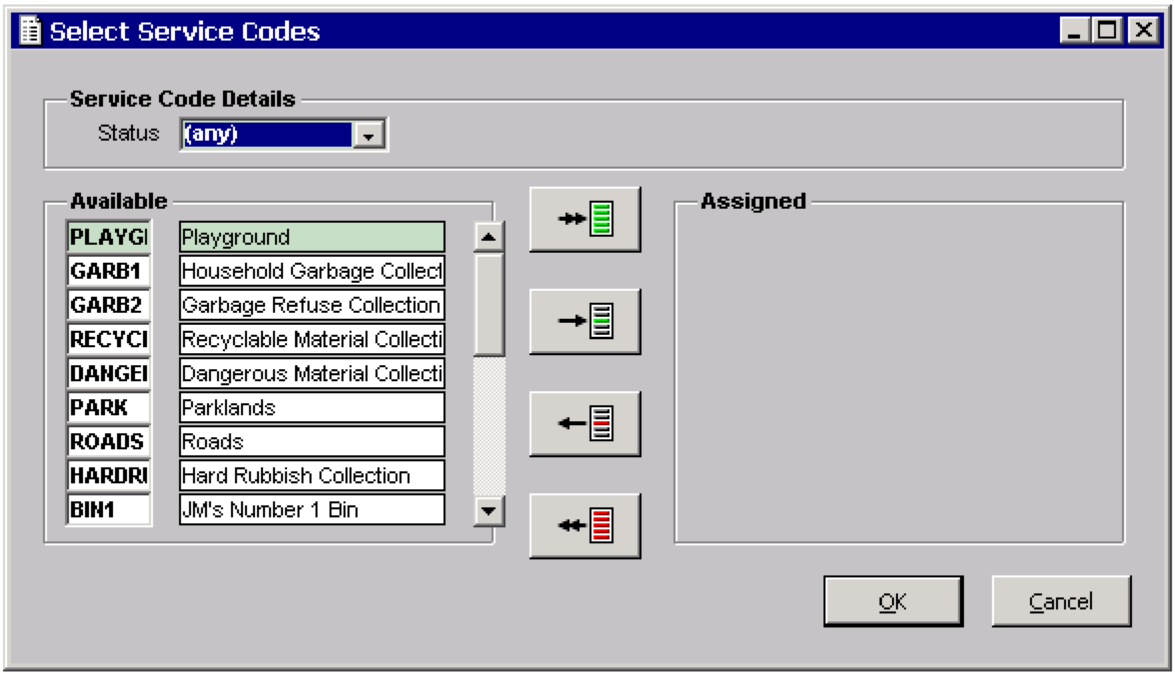
Assigned

The records on this side are currently selected, and therefore will be considered when using this Extract Type.



Attachment Type Filter Maintenance Form

Select Service Codes



Select Service Codes Form

Status

There are 4 options to choose from:-

- Any
- Current
- Historic
- Missing

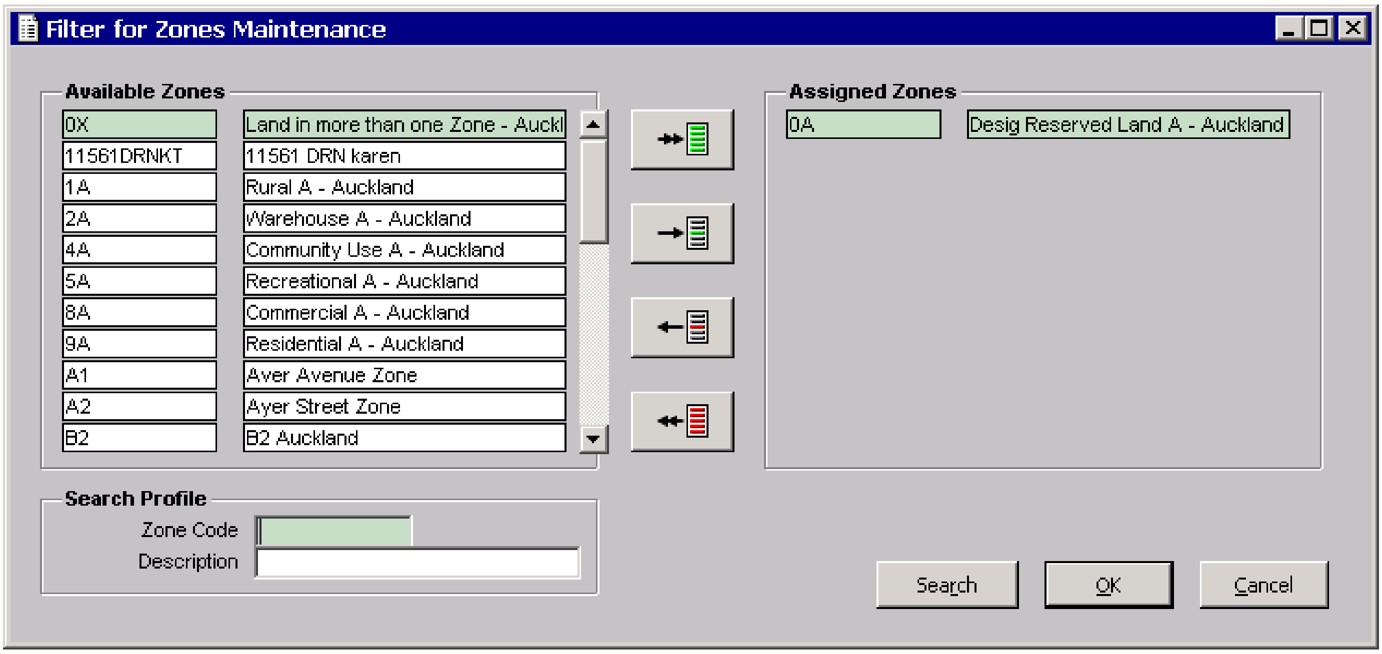
Available

The records on this side are not selected and therefore will not be considered when using this Extract Type.

Assigned

The records on this side are selected and therefore will be considered when using this Extract Type.

Filter for Zones Maintenance



Filter for Zones Maintenance Form

Available Zones

The zones that appear on this side have not been selected for use and therefore will not be considered when using this Extract Type.

If no Zones are selected, then ALL Zones are considered.

If only 1 Zone is selected, then only that 1 Zone will be considered.

If all Zones are selected, then ALL Zones will be considered.

Assigned Zones

The Zones that appear on this side have been selected for use, and therefore will be considered when using this Extract Type.

If no Zones are selected, then ALL Zones are considered.

If only 1 Zone is selected, then only that 1 Zone will be considered.

If all Zones are selected, then ALL Zones will be considered.

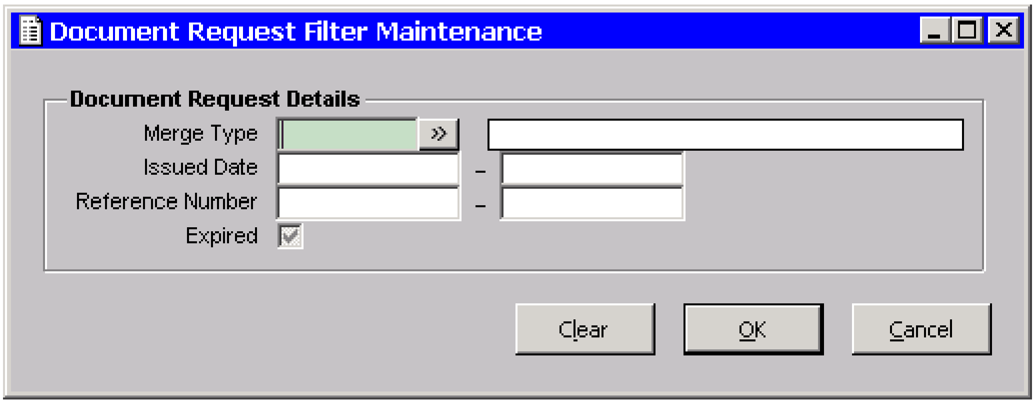
Search Profile – Zone Code

Enter a Zone Code (or part thereof) on which to base a search. After clicking Search button, the records that match the selection criteria will be displayed on the 'Available' side.

Search Profile – Description
Enter a description (or part thereof) on which to base a search. After clicking Search button, the records that match the selection criteria will be displayed on the ‘Available’ side.

Document Request Filter Maintenance Form

The Extract Lists of Certificates (CERT) and Notices (NOTICE) can be filtered by Merge Type, Issue Date (range), Reference Number (range) and Expired Status. Effectively, a Certificate Merge Document can be set up to extract Notices (e.g. Fire Notices) that have been issued within a certain date range and are not 'Expired'.



Document Request Filter Maintenance form

Merge Type
Enter a Merge Type on which to filter the Extract, or alternatively, select one from the Pop Up.

Issued Date
An 'Issued' date range may be entered in these fields to filter the Certificates and Notices.

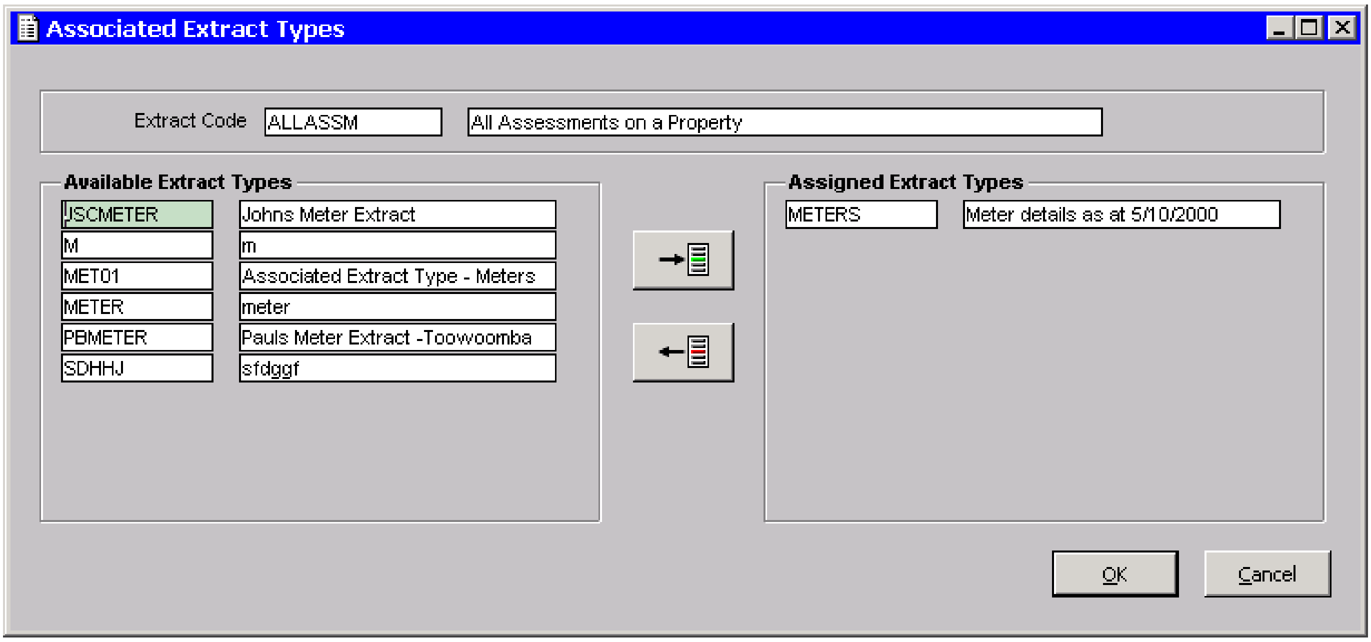
Reference Number
A 'Reference Number' range may be entered in these fields to filter the Certificates and Notices.

Expired Flag
The Expired Checkbox functions as follows:
Checkbox OFF = Do NOT include Expired Notices/Certificates
Checkbox ON = Include Expired Notices/Certificates
Checkbox On, but dimmed = Include all Notices/Certificates regardless of whether they are Expired or not.

Associated Extract Types Form

This form displays when the Associated Extract Types detail button is selected from the Extract Type Maintenance Form. It allows Available Extract Types to be assigned to the Extract Type.

Refer to the section on Handy Hints - Include Statements (142) for details of including Associated Extract field details in your Extract Type.



Associated Extract Types Form

Extract Code/Description

Displays the Extract Code and Description that was entered on the Extract Type Maintenance form.

Available Extract Types

A list of all Available Extract Types is displayed. By pressing the Select button, Extract Types can be moved from the Available Extract Type list to the Assigned Extract Type list.

Assigned Extract Types

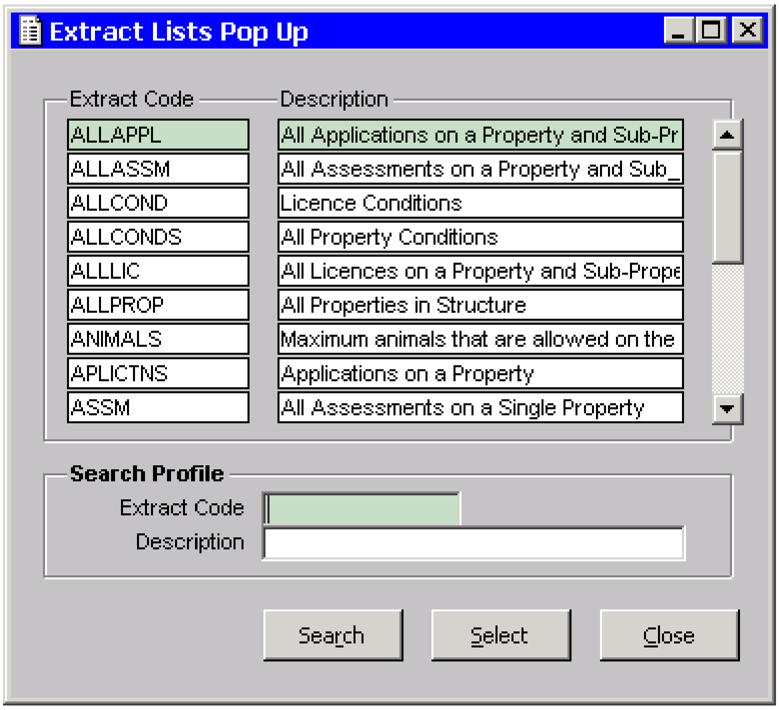
Only one Extract Type per Extract List definition can be selected as an Associated Extract Type. The Assigned Extract Type for the Merge Type is displayed. This Data Extract Type will be automatically inserted as an Include statement when the Template document is created.

Select/Remove Buttons

By pressing the Select and Remove buttons, Extract Types may be assigned or unassigned to be associated to the Extract Type being maintained. Where Extract Types are assigned or unassigned after the initial creation of an Extract Type document, the document should be re-accessed to ensure the format and included fields are correct.

Extract Lists Pop Up Form

The Extract Lists Pop Up Form can be used to select the required Extract List. The Extract Codes available for selection on the Extract Lists Pop Up Form will depend on the Application, which is in use.
For Example: Property Extract Types will provide a list that contains Property related lists - Conditions, Zones, Titles etc.



Extract Lists Pop Up Form

Extract Code
The Extract Code describes all the available lists of data. The list displayed will vary depending on the Application that is in use. (E.g. Property, Applications).

Description
The Description gives further information regarding the available lists of data. The list displayed will vary depending on the Application that is in use (e.g. Property, Applications).

Search Profile - Extract Code
Enter an Extract Code on which to base your search and use Search Button to initiate the search.

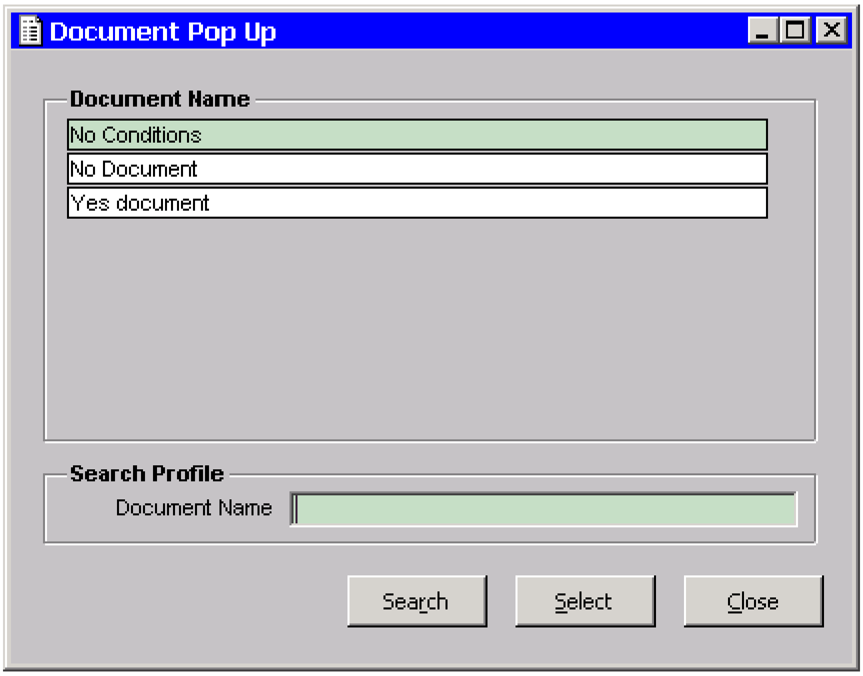
Wildcard searching is available.
For example: P* will extract all Extract Types with an Extract Code starting with P.

Search Profile - Description
Enter a Description on which to base your search and use the Search Button to initiate the search.

Wildcard searching is available.
For Example: Property* will extract all Extract Types with a Description starting with Property.

Document Pop Up Form

The Document Pop Up Form enables the selection of an existing Yes or No Document from the list.



Document Pop Up Form

Document Name
A list of available Yes/No Documents is displayed. The selection of an existing Document is available if required.

Search Profile - Document Name
Enter a Document Name on which to base your search and use Search Button to initiate the search.

Wildcard searching is available
For Example: P* will display all Document Names starting with P.

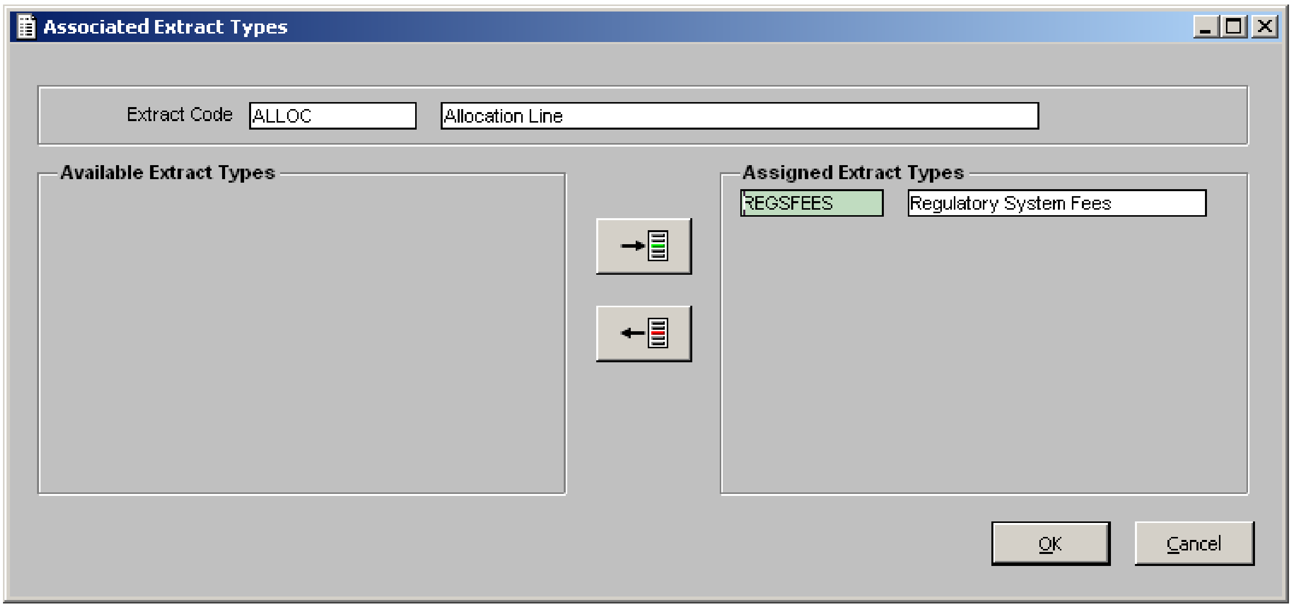
Associated Extract Types for Receipting

The Extract List Type, “REGSFEES” (Regulatory Systems Fee Transactions for an Allocation), has been defined. It can be used as the basis for an Extract Type that details Application/Licensing Fees against a Receipt Allocation. The fields available in the new Extract List Type are as follows:

Field Name	Size	Description of Field Information
Fee_Tran_Amount	15	The Amount field as it appears in Transaction Maintenance, within Application Maintenance.
Fee_Tran_Tax_Amount	15	The Tax field as it appears in Transaction Maintenance, within Application Maintenance.
Fee_Type_Code	6	The Fee Code as defined in Application Fee Maintenance within Applications Parameters.
Fee_Type_Descr	50	The Fee Description as defined in Application Fee Maintenance within Applications Parameters.

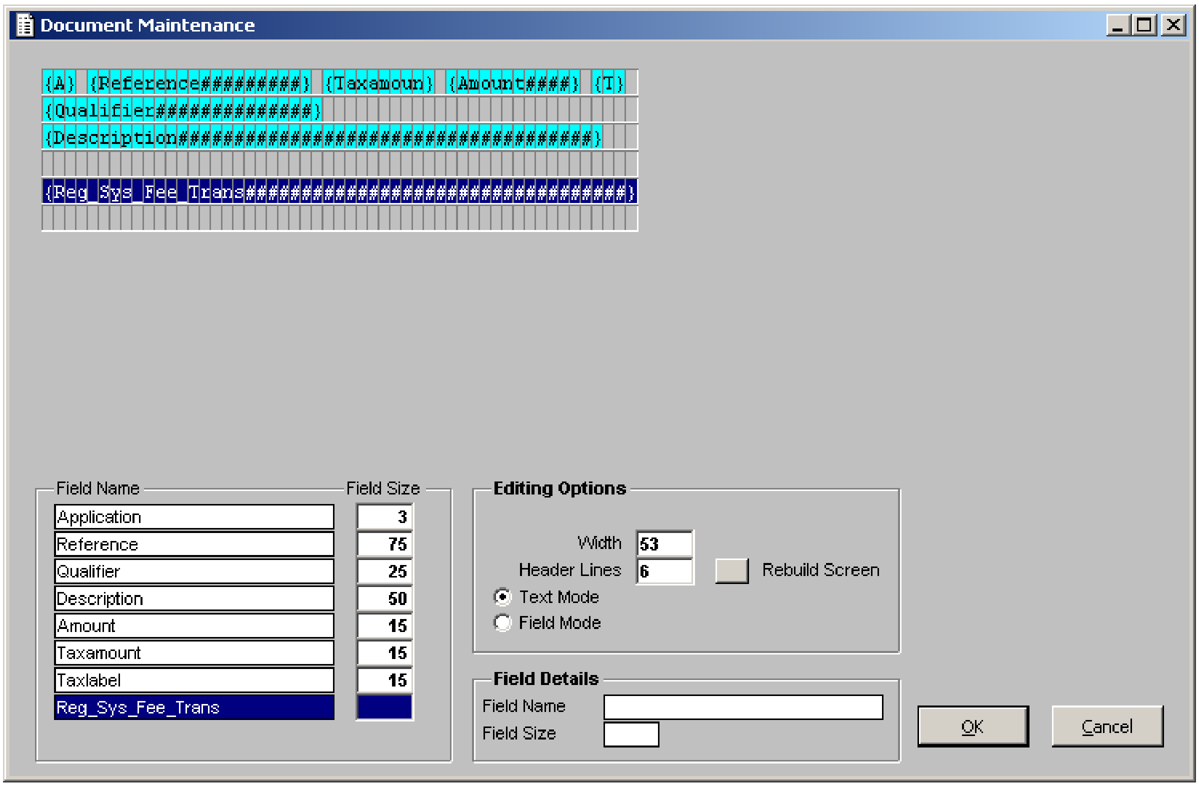
In addition, a new field, “Reg_Sys_Fee_Trans”, has been added to Extract List Type “ALLOC” (Allocations For A Receipt). It represents the new “REGSFEES” Extract List Type.

<u>Extract Type Maintenance</u>
In order for Application/Licensing Fee details to print on Receipts, a new Extract Type must be defined within Extract Type Maintenance, based on the Extract List Type “REGSFEES”. This new Extract Type must then be associated with the existing one based on the “ALLOC” Extract List Type that is already used in printing the organisation’s Receipts. From the Extract Type Maintenance screen, select the Associated Extract Types button, and assign the “Regulatory Systems Fees” Extract Type as shown in the following figure.



Example of associating an “Regulatory System Fees” Extract Type with an “Allocations” Extract Type.

<u>Document Maintenance</u>
The associated extract field (that represents an Extract List) is displayed below in both the Field List and the Document Template with white text on a dark blue background.



Example of an Extract List Field within Document Maintenance

Fields representing Extract Lists always occupy an entire line within the Document Template. If the Document Width is modified, these fields are resized appropriately. It is not possible to place an Extract List field on a line that contains another field, and vice versa. If an Extract List Field is placed on a line that contains only text, it will completely overwrite the text.

Document Merging for the Internal Defined Editor

Receipt Printing

Receipt Printing using the Internal Defined Editor caters for the processing of Associated Extract Types within Extract Types. This functionality is activated when an Extract List Field has been included in an Extract Type's Document Template in Document Maintenance, and a corresponding Extract Type has been selected from the list of Associated Extract Types.

When an Extract List Field is encountered during merging of an Extract Type document, the portion that has so far been merged is immediately incorporated in the final document, after checking for a potential page overflow. Processing of the Associated Extract Type document then commences. Within the "parent" Extract Type document, the line on which the Extract List Field appears is completely replaced by the Associated Extract Type document. If the Associated Extract Type document turns out to be empty, the line containing the Extract List Field in the "parent" document disappears altogether. Upon completion of the merging of the Associated Extract Type, the remainder of the "parent" Extract Type document will be merged.

How to Set Up Extract/Merge Types using Associated Extract Types

Creation of the Associated Extract Type

1. Select the Edit Extract Types option from the [Receipting][Receipting Parameters] menu.
2. Select the "New" button, and within Extract Type Maintenance, select an Extract List Type of REGSFEES.
3. Type a suitable, unique Extract Code, and a Description along the lines of "Application Fee Transactions".
4. Select the "OK" button.
5. Set the Width to 80 (or whatever is appropriate for your document) and the Lines to 1, then select the "Rebuild Screen" button.
6. Select Field Mode, then place all four fields in appropriate positions within the one-line document (it will be necessary to shorten field Fee_Type_Descr).
7. Select the "OK" button to save the template, then "OK" again to save the Extract Type.

Creation of the Allocation Extract Type

1. From the Extract Type Selection screen, select the "New" button, and within Extract Type Maintenance, select an Extract List Type of ALLOC.
2. Type a suitable, unique Extract Code, and a Description along the lines of "Applications For A Receipt".
3. Detail out on the Associated Extract Types button. The Extract Type created earlier, based on List Type REGSFEES, is in the list of Available Extract Types on the Associated Extract Types screen.
4. Double-click on the Extract Type created earlier so that it appears in the Assigned Extract Types list, then select the "OK" button.
5. Detail out against List Template to bring up the Document Maintenance screen. The field Reg_Sys_Fee_Trans appears in the Field Name list. It has a dark blue background and the field name appears in white to indicate that it represents an Extract List. There is nothing in the Field Size.
6. Set the Width to 80 (or whatever was used previously) and the Lines to 7, then select the "Rebuild Screen" button.
7. Select Field Mode, then place all fields except Reg_Sys_Fee_Trans in suitable positions in the template document, along with text descriptions, leaving the last line free.
8. Ensuring that Field Mode is once again selected, click on Reg_Sys_Fee_Trans then click on a column in the middle of the last line of the template document. The entire last line is filled in with the name "Reg_Sys_Fee_Trans" (padded out with hashes) against a dark blue background.
9. Select "OK" to accept the changes to the document template.

<u>Creation of the Merge Type</u>
From the [Receipting][Receipting Parameters] menu, select Edit Merge Types.
Create a new Merge Type, or modify an existing one, such that the Extract Type based on List Type ALLOC that was created earlier is included in the list of Extract Types. Also include an Extract Type based on List Type PAYMENT.
Detail out against the Template Document and create a document header and footer.

<u>Receipt Printing</u>
For those Allocations that are against Applications, all of the Fees should be correctly printed in the layout specified in the "Application Fee Transactions" Extract Type.

For those Allocations NOT against Applications, the line in the Extract Type's Document Template that represents the embedded Fee Transactions Extract Type will be excluded altogether.

Merge Types

This Chapter describes the establishment of Merge Type Parameters. Merge Types define the fields and lists that are to be included as part of the Final merged document.

For each Merge Type the Type of Document (i.e. Certificate, Letter), Data Fields and Extract Types are defined. A Template document is then created using the nominated Word Processor Product for the application in use.

Note: Documents can contain calculated fields to produce a calculated result. Calculation fields can be used within Certificates to generate individual 'insert' fields that may be required to specify certain Transaction Types that are not covered by a single merge field. An Example would be where Arrears needs to exclude Interest-Arrears. The merge field of Interest-Arrears can be deducted from merge field of Arrears to produce an Insert field. This process is achieved using Bookmarks on the merge fields and a formula on the Insert field. Further advice can be sought from the Helpdesk if specific instructions are required.

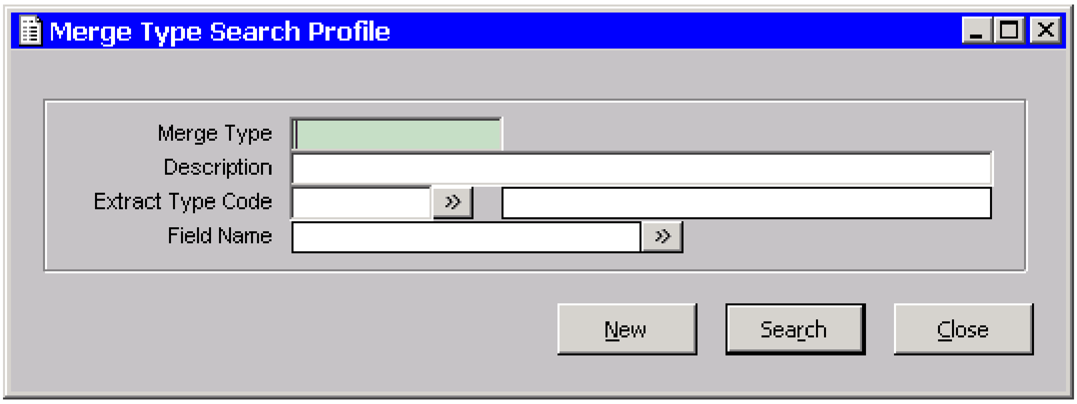
The following topics are covered in this section:

Merge Type Maintenance

The Merge Type Selection process enables the creation and modification of Merge Types. A list of existing Merge Types and their associated Description will display.

Merge Type Search Profile Form

This form enables a search process to be performed on existing Merge Type documents, using the Merge Type Code and/or Description.



Merge Type Search Profile Form

Merge Type
Enter a Merge Type (or part thereof) on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

Description
Enter a Description (or part thereof) on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

Extract Type Code
These fields allow an Extract Type Code to be entered or selected from the Pop up. This allows users to find all Merge Types which use a particular Extract Type.

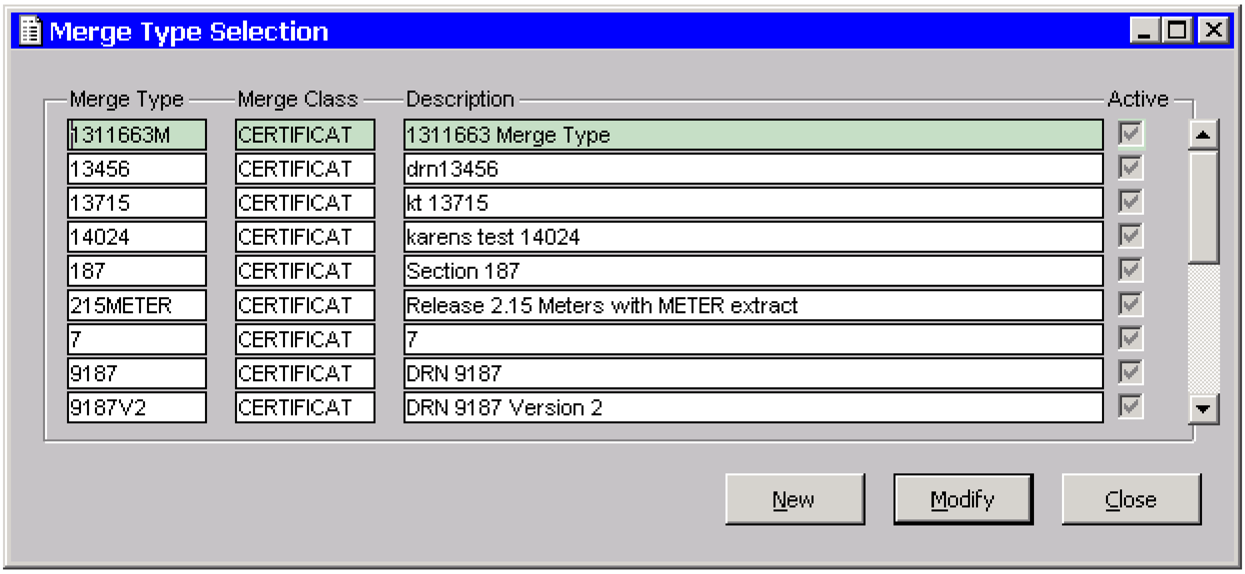
For example, if a user creates an Extract Type called NAMES which uses the Extract List Type of NAMES, and they have assigned this to multiple Merge Types, when they search for NAMES, it will list all Merge Types that have this assigned.

Field Name
This field allows a general Extract Field to be selected from the Extract Field Pop up. This allows users to find all Merge Types that use that particular Extract Field.

To clear the field, press F7, or select ‘Clear Search Profile’ from the Search Menu.

Merge Type Selection Form

The Merge Type Selection form displays the existing Merge Types. From this form you may create a new Merge Type or select one of the listed Merge Types for modification.



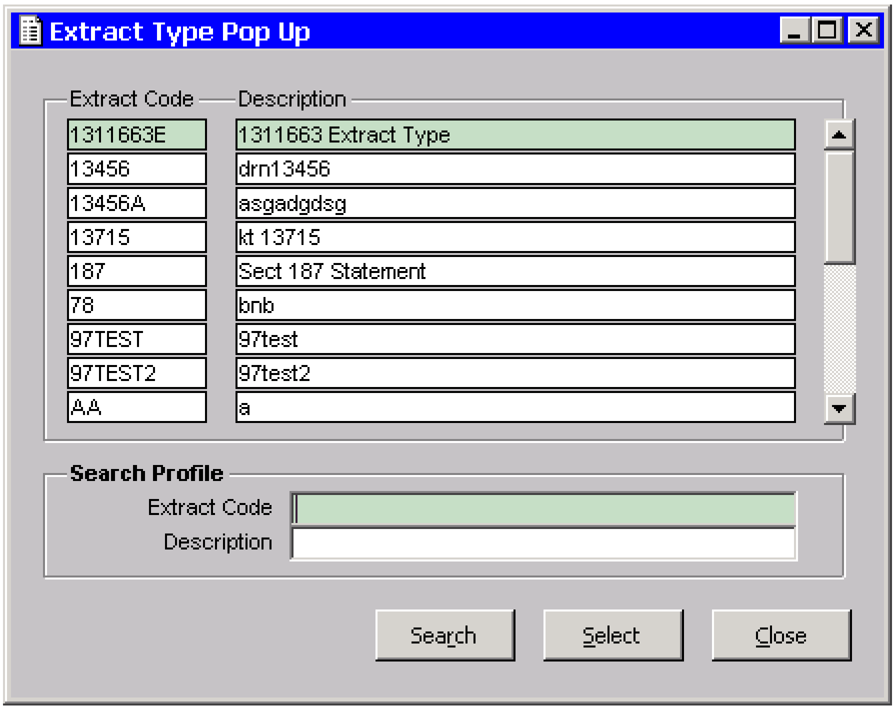
Merge Type Selection Form

Merge Type
The Merge Type codes are displayed for each Merge Type. Click on the required code and select the Modify Button to amend the Merge Type details

Description
A further Description of each Merge Type code is displayed for each Merge Type.

Active
If the Active checkbox is checked on, the Merge Type can be used to create documents. If the checkbox is checked off, the Merge Type is no longer available for documents. This flag is not able to be modified on this form. To change this flag, select a Merge Type and select the Modify Button.

Extract Type Pop Up Form



ExtractType Pop Up Form

Extract Code and Description

These fields display a list of Extract Codes and their Descriptions which are available for selection.

Search Profile - Extract Code and Description

Enter an Extract Code and/or Description on which to base your search and use the Search Button to initiate the search. This is useful when there are more than nine records in the list.

Wildcard searching is available.
For example: L* will extract all Extract Codes starting with L.

Merge Type Maintenance Form

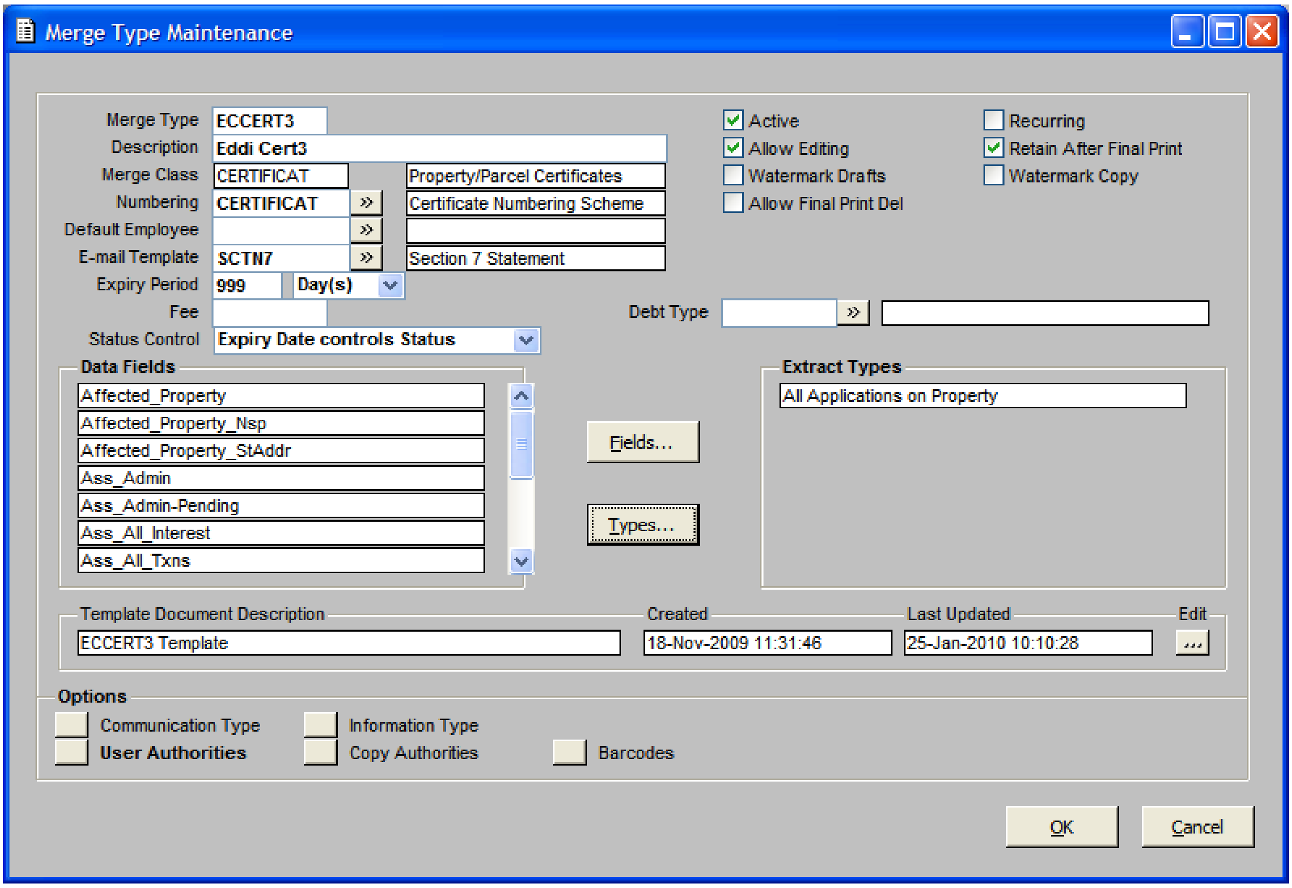
Merge Types and their associated Documents can be created or modified from this form. Merge Types may be deleted if the documents have not yet been utilised in a Document request process.

This form is available within the various applications that use Merge Type documents. The Merge Class nominated (i.e. Certificate, Notice, Labels etc) will control whether some fields are displayed.
For example : Numbering Schemes may only be required on Certificates.

The Available Data Fields displayed will be tailored depending on the Application in use. If Merge Types are being created within the Property Application, General and Property related Data Fields can be selected. If Merge Types are being created within the Name and Address Application, only the General Data Fields will be available.

Pathway Word Processing provides the user with the option of having documents ‘Draft’ printed. The Draft print facility will be available when the associated Merge Type specifies that editing of generated documents is allowed. In addition a new parameter can be specified on the Merge Type, when editing is allowed, which will cause any printed ‘Draft’ documents to have a Watermark of the word ‘DRAFT’ printed diagonally across the page. This Watermark will assist users in determining which documents have been completed. The Watermark will be automatically removed when the document is ‘Final’ printed. A new Watermark Draft flag has also been added. See below for further details.

NOTE: The transparency can now be set using the CWP_WatermarkTransparency setting in the Pathway SetL.asn file. This should be set to a value between 0.0 and 1.0 (where 0.0 means opaque and 1.0 means totally transparent). For example, to set the transparency of watermarks to 25% use:
CWP_WatermarkTransparency=0.25



Merge Type Maintenance Form

The Merge Type Maintenance Form is used to define the following details in relation to a Merge Type.

- Merge Class and additional details relating to that Class (e.g. Numbering Code, Fee, Expiry Periods).
- Options regarding the Printing and Editing of Documents.
- The Data Fields and Extract Types (where applicable) for the Merge Type.
- The Template Document for the Merge Type. This is the basic Document format, which is created via the nominated Word Processor Product.

ePathway Certificate Requests

The Merge Type Maintenance form within Property parameters includes the following fields/functions:

1. ePathwayAccess - display of ePathway Request Type field is conditioned on the following:
    - Only applicable to Property – CERTIFICAT Merge Class
    - EWP – ePathway Word Processing Application is active
    - Access to Authorised Function 'ePathway Property Certificate Request'

2. Debt Type - display of Debt Type field is conditioned on the following:
    - LDR Accounts Receivable Application is active
    - Customer Profile system indicates that Pathway or ePathway Property Certificates can be paid for by Debtors Invoice or Credit Balance

See further details in the following fields: ePathway Request Type (77) and Debt Type (73).

Merge Type User Security

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

Release 2.15 of the software incorporates a new Authorised Function – Merge Type User Security.

This feature allows for specific authority to be granted to users by Merge Type. A user may have no access at all, or may be granted 'Create', 'Change' or 'Delete' access. The security options control a user's ability to Create, Change and Delete documents based on a Merge Type.

Merge Type User Security will be applied whenever a Merge Type is referenced for selection by any Pathway module. However, there are circumstances and options where security will not be applied. The following rules assist in determining just when Merge Type Security is used.

- Merge Type Security will not be applied when using parameter maintenance functions. Any user that has Menu access to parameter maintenance will be able to select and maintain Merge Types, including security on the Merge Types.
- Merge Type Security will not be applied when running Reports or Batch processes that can generate documents as a part of their function. Any user that has Menu access to Reporting or Batch process options will be able to select any Merge Type. (However, as stated below, the Batch Printing function requires that the User have either 'Create' or 'Change' authority.)
- Merge Type Security will not be applied to the generation and printing of Receipts. Any user that has Menu access to Receipt Entry will be able to generate and print receipts.
- Merge Type Security will be applied in all other cases where Merge Type selection is involved. For the creation/generation of documents a user must have at least 'Create' authority. For the modification and Final Printing of documents a user must have 'Change' authority. The deletion of a final print document may only be performed by the User ID that has been defined within Pathway as the Administration user. For the standard 'Batch Print' function found in most Pathway modules a user may have either 'Create' or 'Change' authority. (Note that the assignment of 'Create' authority implies 'Change' authority)

The management of Merge Type Security is controlled via the standard Merge Type Maintenance function found in most Pathway modules. If the authorised function is active, two new option buttons will be available on this form:

- User Authorities
- Copy Authorities

Merge Type

The Merge Type code is an 8 character alpha numeric field entered to uniquely identify each Merge Type. This field is mandatory when entering a new Merge Type.

Description

The Description field gives further information regarding the Merge Type. This field is mandatory when entering a new Extract Type.

Merge Class

The Merge Class identifies the type of document being created. When adding a new Merge Type, the Merge Class field has a Pop Up button available to assist in the selection of a Merge Class.

Numbering Scheme

The Numbering Scheme code will only be available for certain Merge Classes. These Classes are determined in the Merge Class Parameter (Refer Chapter 3.4).

For example, a Numbering Scheme may be required on Certificate and Notice Documents only.
The Numbering Scheme entered will use the next available number for the particular Scheme and allocate this to all Documents produced with this Merge Type.

The Numbering Scheme Pop Up button can be used to get a list of available Numbering Schemes.

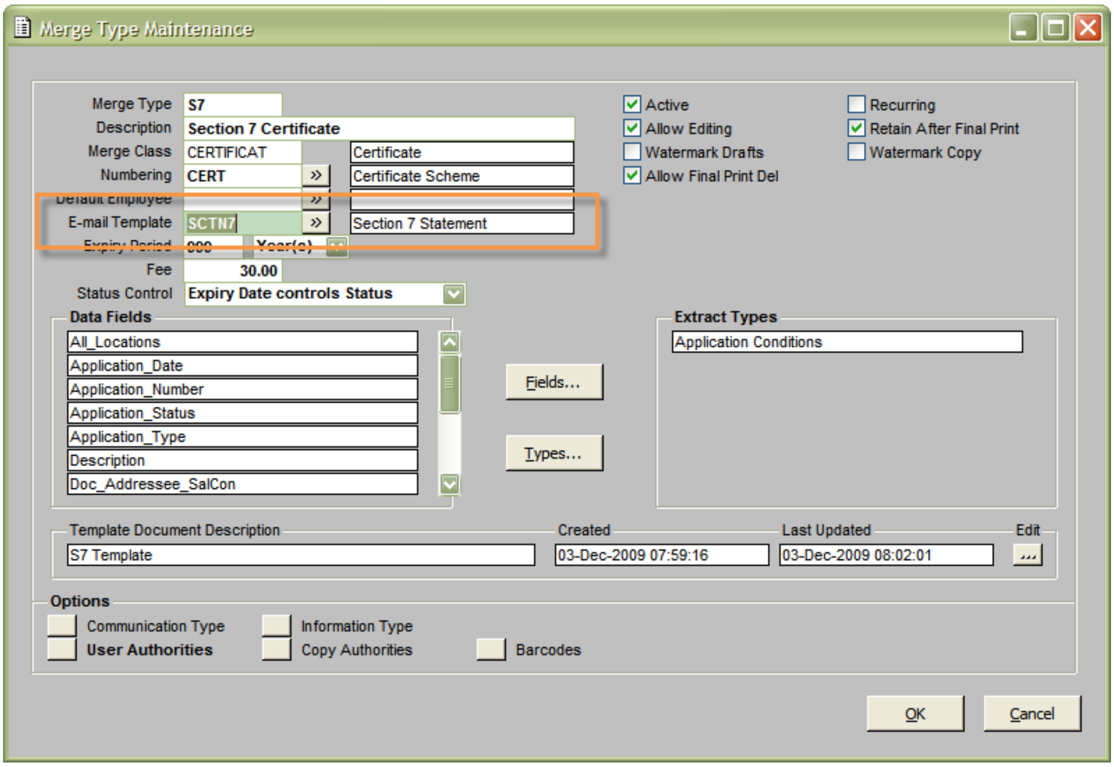
Default Employee

Selection of the Default Employee Popup button on this field will display the User Pop Up displaying only Users with current Employee Role details. A User may be selected to include on the Merge Type Maintenance form. In order for the details to be included in the Merge Type, the Employee Contact Details fields must be included in the field selection list.

E-mail Template

A new field, E-mail Template, has been added to the Merge Type Maintenance form, as shown in the figure below. This provides a facility to specify custom messages to accompany documents delivered electronically in PDF format, whether through the Electronic Document Delivery authorised function, or through Customer

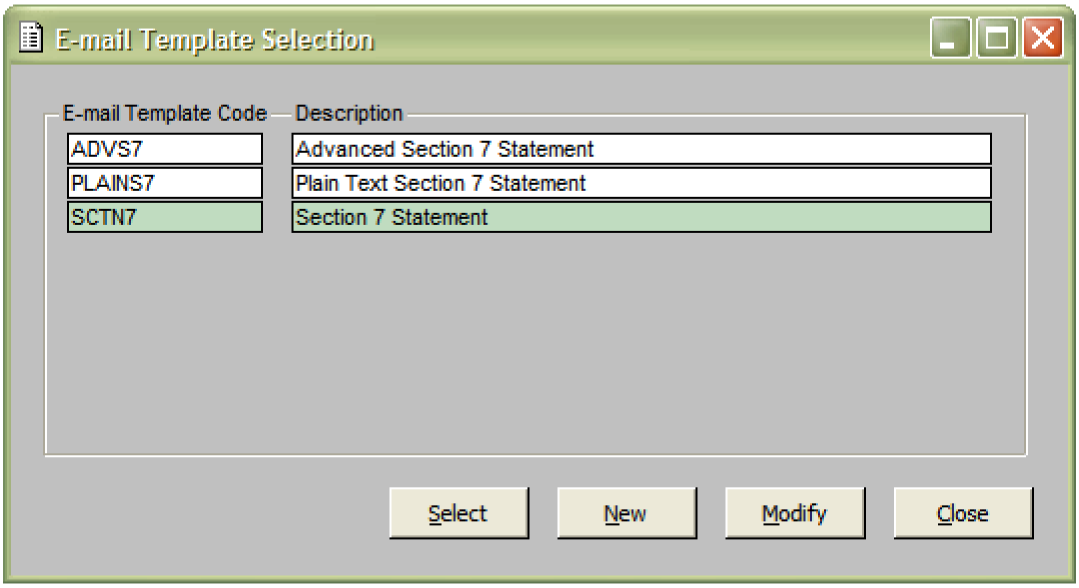
Profile-linked functions such as ePathway Certificate Request. The custom messages can incorporate Pathway data at the time of sending, and can be in HTML format.



Merge Type Maintenance form showing new E-mail Template field.

When the pop up button next to the field is selected, the E-mail Template Selection form is displayed, showing a list of available e-mail templates to choose from. If none have been defined, the E-mail Template Maintenance form is invoked in add mode. New templates can also be defined via the 'New' button on the E-mail Template Selection form, and existing templates maintained via the 'Modify' button.

If a retrieve profile is typed into the E-mail Template field before tabbing out, the templates listed on the selection form are filtered to match that retrieve profile. If only one template occurrence matches, its details are automatically returned to the Merge Type Maintenance form.



E-mail Template Selection form.

The E-mail Template field is always available on the Merge Type Maintenance form, but is only significant when documents are sent electronically. For more information, please refer to the details on the new Emailing module (CEM) in the Release Notes Enhancements and New Functionality 3.05 and Release Notes Special Instructions 3.05 documents.

Expiry Period

Enter an Expiry period that will be used to calculate the Expiry Date of a Document. The Expiry Date is calculated during the Document Generation process, based on the Issue date.
Three options are available from the drop down list to clarify the number entered.

- Day(s)
- Month(s)
- Year(s)

Fee

If a Fee amount is entered, this fee will default to the Document Generation form when processing a Final document. This field will only display for the appropriate Merge Classes and if it has been turned on at the Merge Type Parameter level.

Status Control

The Status Control field allows the user to select on an individual basis whether a Merge Type status will be controlled by the Expiry Date or the Completion Date. This field is only displayed where the Merge Class has Completion Date and Expiry Date checked on in Merge Type Parameters.

Where this is set to Completion Date, the status of the Request will reflect Completed, where a Completion Date has been entered. If no Completion Date has been entered, but the Expiry Date has passed, then the status will correctly reflect Expired.

Where the parameter is set to Expiry Date, then once the Expiry Date has passed, the Status will always reflect Expired, regardless of whether a Completion Date has been entered or not.

The default setting will display Expiry Date, but can be modified to reflect Completion Date.

This field is displayed as a dropdown list as follows

- Completion Date Controls Status
- Expiry Date Controls Status

Active

If the Active checkbox is checked on, the Merge Type can be used to produce a Final document via one of the Application areas (i.e. Property, Name and Address etc). If the checkbox is check off, the Merge Type is no longer available to produce Documents.

Recurring

If the Recurring checkbox is checked on, the Merge Type is deemed as recurring and the Document will be produced during a Recurring Document Generation process.

Allow Editing

If the Edit Final Document checkbox is checked on, Documents may be edited after they have been generated, and prior to printing. If this checkbox is not checked on, the Documents can be accessed in ‘Display Only’ mode after generation.

Retain After Final Print

If the Retain After Printing checkbox is checked on, Final Documents will be retained in the nominated directory structure. A Final Document cannot be retained for Name and Address Labels. This flag can be overridden by the ‘Retain after Printing’ flag settings on the Document Request Maintenance and the Batch Processing forms.

Watermark Drafts

An enhancement has been made to Pathway Word Processing to provide customers with the ability to mark a document as Final without performing a physical print of the document. This function is available under two scenarios.

Firstly, when the Draft Watermark checkbox is ‘OFF’ for a Merge Type, the user will be presented with a ‘Finalise’ option, when this option is taken, no physical print will be performed.

Secondly, when Draft Watermark checkbox is ‘ON’ for a Merge Type, the user will be presented with ‘Final Print’, with the existing option to ‘Post’ or a new option ‘None’ that will suppress the printing process.

DRAFT WATERMARK TRANSPARENCY
It was not previously possible to adjust the transparency of the "DRAFT" watermark in Word documents generated by Pathway. The transparency would always be set to 50%. The result was that on some printers the "DRAFT" text was not visible (it was too light).

The transparency can now be set using the CWP_WatermarkTransparency setting in the Pathway SetL.asn file. This should be set to a value between 0.0 and 1.0 (where 0.0 means opaque, and 1.0 means totally transparent). For example, to set the transparency of watermarks to 25% use:
CWP_WatermarkTransparency=0.25.

Watermark Copy

The Watermark Copy function provides the ability to print a “Copy” Watermark on documents that have already had a Final Print.

In order to have a Copy Watermark on documents that have already had a Final Print, the Watermark Copy flag must be checked ON in Merge Type Maintenance.

In Document Request Maintenance, if the final printed document is opened and printed from within Word, the Copy Watermark will be applied. If the document is reprinted via the Reprint Button, the “Copy” Watermark will be applied.

In Document Batch Processing, if the Reprint option is selected and the selected Merge Type has the Watermark Copy flag checked ON, the “Copy” Watermark will be applied.

DRAFT WATERMARK TRANSPARENCY
It was not previously possible to adjust the transparency of the "DRAFT" watermark in Word documents generated by Pathway. The transparency would always be set to 50%. The result was that on some printers the "DRAFT" text was not visible (it was too light).

The transparency can now be set using the CWP_WatermarkTransparency setting in the Pathway SetL.asn file. This should be set to a value between 0.0 and 1.0 (where 0.0 means opaque, and 1.0 means totally transparent). For example, to set the transparency of watermarks to 25% use:
CWP_WatermarkTransparency=0.25.

Allow Final Print Delete

A new field, 'Allow Final Print Del' has been added to the Merge Type Maintenance form. Previously, only the System Administrator could delete documents at 'Final Print' stage. If 'Allow Final Print Del' is set on, then the User will be able to delete documents at 'Final Print' for that particular Merge Type. This overrides the requirement for System Administator interaction.

ePathway Request Type

ePathway Access is available when the following conditions have been met:

- Only applicable to Property – CERTIFICAT Merge Class
- EWP – ePathway Word Processing Application is active
- Access to Authorised Function ‘ePathway Property Certificate Request’

Certificate Merge Type Maintenance will display the ePathway Request Type field with a dropdown selection of the following options:

- Cannot be Requested
- Request Only
- Automatic Generation

The default setting for the ePathway Access is ‘Cannot be Requested’. If ‘Cannot be Requested’ is selected, then this Merge Type will NOT be available for selection via the Web.

If ‘Request Only’ is selected, then the Merge Type will be available for selection on the web, but will be requested only and will be processed by staff and generated and issued in the normal manner.

If ‘Automatic Generation’ is selected, then the Merge Type will be available for selection on the web, and the Certificate will be automatically generated and emailed to the web user if possible.

Debt Type

Debt Type is available if the following conditions have been met:

- LDR Accounts Receivable Application is active
- Customer Profile system indicates that Pathway or ePathway Property Certificates can be paid for by Debtors Invoice or Credit Balance

Where Pathway Accounts Receivable is being used, (as defined in the System Parameters) this parameter allows the nomination of the Debt Type that is to be used when generating the Invoice. It allows selection from the valid Pathway Debtors Debt Types.

Having this field at the Merge Type level enables customers using Pathway Accounts Receivable to separate the Debt Types (and therefore Ledger Accounts) per Merge Type.

If a Fee is specified for the Merge Type, then the Debt Type is mandatory.

Data Fields

This section contains a list of the selected Data Fields for the Merge Type. To view the Available Data Fields, to add or remove Data Fields to the Merge Type, click on the Fields button.

Extract Types

This section contains a list of the selected Extract Types for the Merge Type.

To view the Available Extract Types, to add or remove Extract Types to the Merge Type, press the Types button.

Fields Button

By pressing this button, the Extract Field Maintenance Form will display to enable selection or removal of Data Fields from the Available Data Field list.

Types Button

By pressing this button, the Extract Type Maintenance Form will display to enable the selection or removal of Extract Types from the Available Extract Types list. For those Extract Classes where this option is not available (i.e. Name and Address Labels), this button will be dimmed.

Description

This field contains the description of the List Template document that is generated when a new Template is created. The Description is based on the Merge Type code. This Description is generated by the system for informational purposes only and cannot be maintained.

Edit Document Button

By pressing this button, the Template Document can be created or modified via the relevant Word Processor package.

Merge fields can be inserted into the document using the Insert Merge Field Button on the tool bar. Merge fields such as Document_Name, Document_Path etc can also be inserted into the footer.

Refer to your Word Processor Manuals for further assistance in Creating the document, inserting Merge Fields and Include statements.

Created

This field contains the date that the Initial Template document was created via the relevant Word Processor Product. This date is generated by the system for informational purposes only and cannot be maintained.

Last Updated

This field contains the date that the Template document was last maintained via the Word Processor Product. This date is generated by the system for informational purposes only and cannot be maintained.

Detail Button

Selection of the Detail Button displays the Document Maintenance Form where the header and footer details for the receipt document can be set up.

Options - Communication Type Button

When the Communication Type button is selected, the user will be presented with a Pop Up Form listing all types created through the Name and Address parameters. The Merge Type/Communication Types Maintenance Form enables selection or removal of Data Fields from the Available Data Field list to the Assigned Data Field.

Options - Information Type Button
When the Information Type button is selected, the user will be presented with a Pop Up Form listing all types created through the Name and Address parameters. The Merge Type/Information Types Maintenance Form enables selection or removal of Data Fields from the Available Data Field list to the Assigned Data Field.

Options - User Authorities
The 'User Authorities' option button displays a Select/Remove style form called "Merge Type User Authority Maintenance" which provides the ability to maintain the list of users authorised to a Merge Type, and the level of authority to be granted to those users. The 'User Authorities' label will be bolded if authorities have been set up.

A conversion function has been provided to perform the initial setup of all user authorities. Refer to the following instructions for details on running this conversion.

For anyone planning to use this feature a conversion form has been provided to allow you to create the initial set of Security data. This conversion will assign all Users full authority to all Merge Types. After running the conversion you may then review the user security, by Merge Type, within each Pathway Module via the various Merge Type Maintenance functions in each module.

The conversion form may be run at any time following the Release Upgrade.

To run the Merge Type Security initial conversion, perform the following steps:
1) Log on to your Pathway environment as the special 'SCASYS' user.
2) Click on the 'Tools' menu bar option.
3) Click on the 'Run...' option.
4) In the Run Form dialog box, enter the following form name- CCVH33WP
5) Click the 'Process' button to run the conversion.
Note that the conversion process could run for some time (15-45 minutes) depending on the number of Users and Merge Types on your system.

Options – Copy Authorities
The 'Copy Authorities' option allows the security definition from one Merge Type to be copied to another Merge Type.

When using this option the Merge Type Popup will be shown, from which you may select a Merge Type to copy the authorities from. The list of Merge Types shown on the Popup will exclude the current Merge Type, and include any Merge Types that have some security defined.

After selecting a Merge Type, the authority definitions from that Merge Type will be copied to the current Merge Type.

Note that any user authorities already defined on the current Merge Type will not be overwritten, but any other user authorities (for Selected Users) will be copied.

Once the copy has been made the new Merge Type User Authority Maintenance form will be shown, with the resulting user authorities as copied from the selected Merge Type. At this point you may use the 'Cancel' button to abandon all the changes, or the 'OK' button to accept.

Merge Type User Authority Maintenance Form

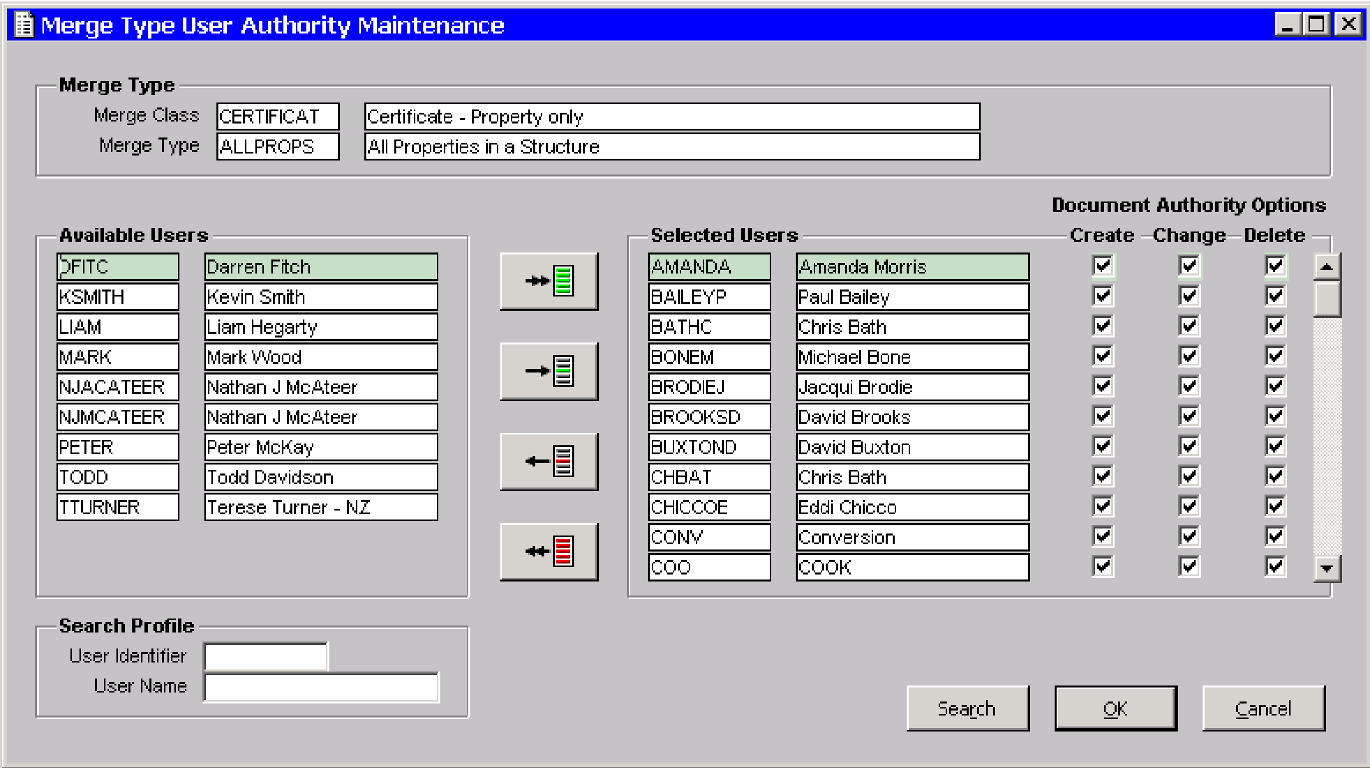
This form allows Merge Type Security to be set up for each User. When Merge Type Security is in effect it will be applied via the various Popup and Selection forms from which Merge Types are usually selected.

When a user is attempting to create a new document, and they are not authorised to create documents for a Merge Type, then that Merge Type will simply be excluded from the Popup or Selection list.

When a user is attempting to maintain existing documents, then only Merge Types from which they have been explicitly excluded will be excluded from the Selection list. Otherwise they will be able to select documents for those Merge Types. Once the user is presented with the standard Document Request Maintenance form the options available to them will be based on their security options.

Note that a user without ‘Create’, ‘Change’ or ‘Delete’ authority will still be able to ‘View’ the document and create a ‘Draft Print’ of the document, if that option would normally have been available.

If Merge Type Security is ON at the System Parameter level and the User has not been assigned for a particular Merge Type (i.e. the User’s name/ID remains on the left hand side of the Merge Type User Authority Maintenance form), then the User will not be able to view any documents created for that Merge Type (i.e. any documents using that Merge Type will not be included in the Document Selection form).



Merge Type User Authority Maintenance Form

Merge Type - Merge Class / Type

These fields display the Merge Class and Merge Type selected along with descriptions. These fields are display only.

Available Users

The names displaying on the left side of the form are the Users available for selection. Selection may be made via the ‘Select’, ‘Remove’, Select All’ and ‘Remove All’ buttons situated in the middle of the form.

Selected Users

The names displaying on the right side of the form are the Users selected to be given authority to the selected Merge Type. Initially, when the conversion function has been run, all Users will be assigned full authority to all Merge Types (see details under Options – User Authorities: (79).) It will then be necessary to review the User Security, by Merge Type within each Pathway module.

Document Authority Options

The following Document Authority Options are available for each User:

- Create Authority means that a user may create Document Requests and Generate the documents. If ‘Create’ authority is granted to a User, then ‘Change’ authority will be implicitly granted, This means that you will not be able to turn off ‘Change’ whilst ‘Create’ is on. However, it is possible to grant ‘Change’ authority without granting ‘Create’ authority.

- Change Authority means that a user may modify the details of an existing document. This includes editing the document and performing a Final Print. (Note that a user that is granted Create Authority is also granted Change Authority)

- Delete Authority means that a user may delete a Document Request (other than a Final Printed Document), and it’s attached documents.

- If a user is assigned to a Merge type, but is not granted any specific authority they will only be able to view existing documents, and also Draft Print a document if that option would normally be available.

Initially, when the conversion function has been run, (see details under Options – User Authorities: (79).) all Users will be assigned full authority to all Document Authority Options It will then be necessary to review the User Security for each User.

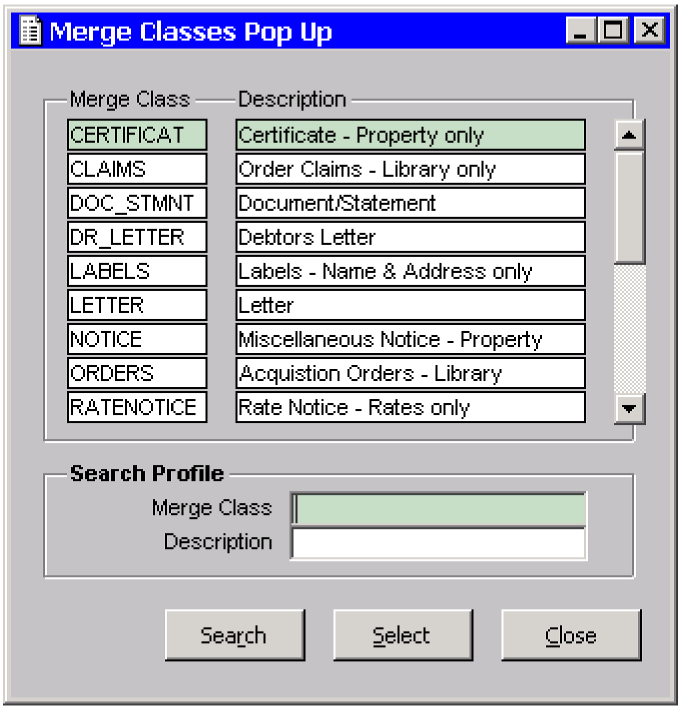
When a User is newly assigned, all document authorities are granted by default.

Search Profile – User Identifier / User Name

These search fields allow searching for available users by Identifier and/or Name. Wildcard searching is available. This function is useful when there are more than 9 Users to search through.

Merge Class Pop Up Form

The Merge Classes Pop Up Form can be used to select the required Merge Class.
The Merge Classes available for selection on the Merge Classes Pop Up form are system defined.



Merge Classes Pop Up Form

Merge Class

The Merge Class list provides the following selection options:

- ❑ CERTIFICAT - This Merge Class is used for Property/Rating certificates
- ❑ CLAIMS – This Merge Class is used in the Library application
- ❑ DOC_STMNT – This Merge Class is in the Library application

- LABELS - This Merge Class is used to produce Name and Address Labels
- LETTER - This Merge Class is used to produce General Letter Documents. It can only be used in the Applications and Licensing modules.
- NOTICE - This Merge class is used to produce Miscellaneous Notices in the Property system.
- ORDERS – This Merge Class is used in the Library application
- RATENOTICE – This Merge Class is used in the Rates system
- RECEIPT – This Merge Class is only used for Receipt layouts

Click on the required Merge Class Code and take the Select Button to return to the Merge Type Maintenance Form with the selected Merge Class.

Description
The Description gives further information regarding each of the Merge Class options. This Description can be maintained via the Merge Class Parameter option.

Search Profile - Merge Class
Enter a Merge Class on which to base your search and use the Search Button to initiate the search.

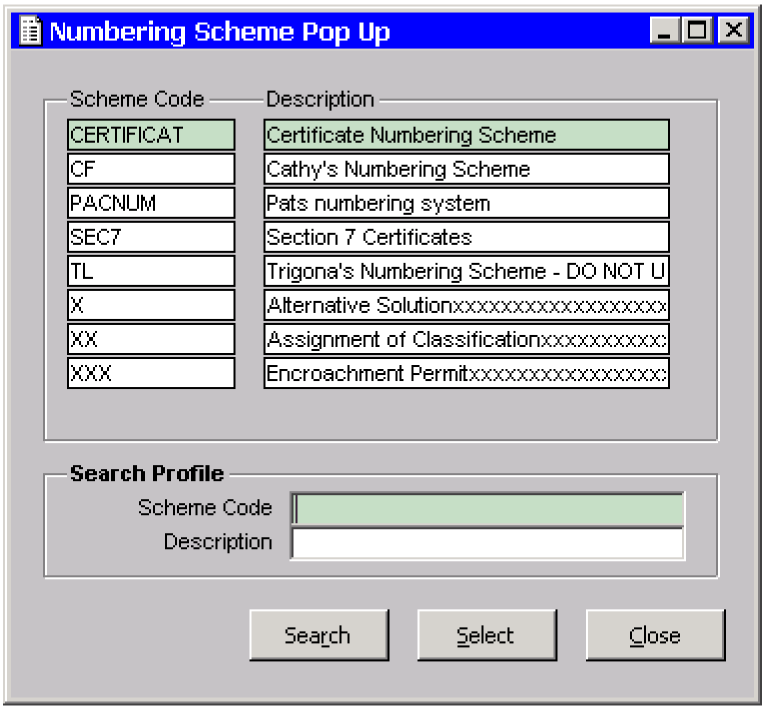
Wildcard searching is available.
For example: L* will extract all Merge Classes with a Merge Class code starting with L.

Search Profile - Description
Enter a Description on which to base your search and use the Search Button to initiate the search.

Wildcard searching is available.
For example: L* will extract all Merge Classes with a Description starting with L.

Numbering Scheme Pop Up Form

The Numbering Scheme Pop Up Form can be used to select the required Numbering Scheme. The Numbering Schemes and their next number are defined within the Numbering Scheme Parameter option (Refer Numbering Scheme Parameters).



Numbering Scheme Pop Up Form

Scheme Code

The Scheme Code describes all the available Numbering Schemes. Click on the required Numbering Scheme and take the Select Button to return to the Merge Type Maintenance Form with the selected Numbering Scheme.

Description
The Description gives further information regarding the available Numbering Schemes.

Search Profile - Scheme Code
Enter a Scheme Code on which to base your search and use Search Button to initiate the search.

Wildcard searching is available.
For example: S* will extract all Numbering Schemes with a Scheme Code starting with S.

Search Profile - Description
Enter a Description on which to base your search and use the Search Button to initiate the search.

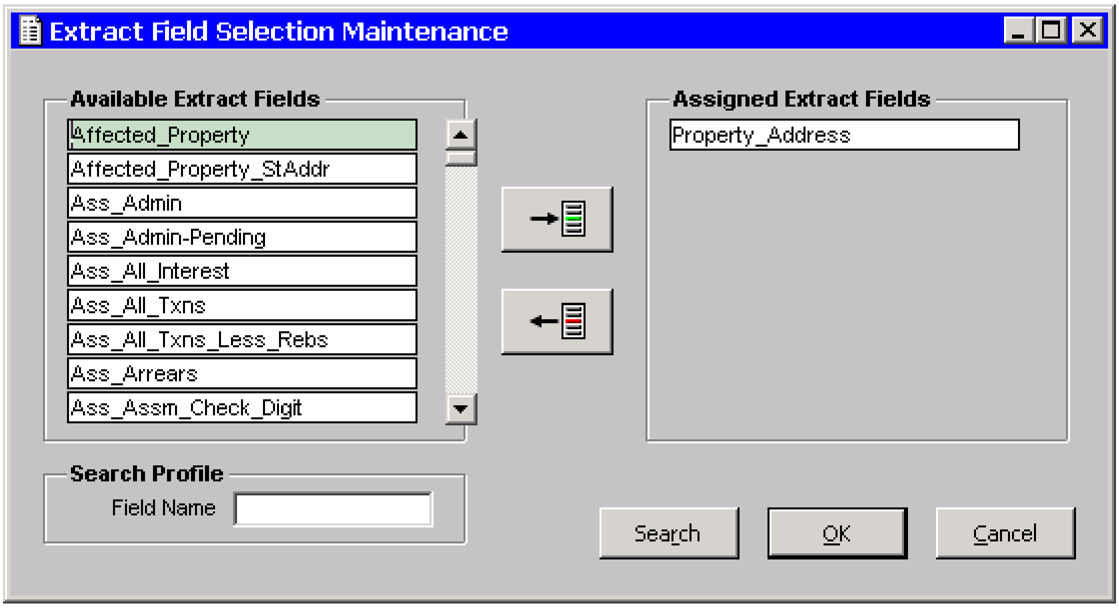
Wildcard searching is available.
For example: SEC* will extract all Numbering Schemes with a Description starting with SEC.

Extract Field Selection Maintenance Form

The Extract Field Maintenance Form contains a list of the Available Data Extract Fields that can be used to create an Assigned Extract Fields list.

By pressing the Select button, the Data Extract field highlighted on the left side of the form is moved to the right hand side. The Remove button can be used to return Data Fields back to the default list.

All Data Extract fields on the right hand side of the form are available for selection when creating the Template document.



Extract Field Selection Maintenance Form

Note: If Data Fields are added or removed after the Template document has been created, the Template document should be edited and saved to ensure no data field conflicts occur.

Available Extract Fields
A list of all Available Extract Fields is displayed. The Extract Fields will vary depending on the Application being accessed. For example: Property related extract fields will only display if defining a Property Merge Type. By pressing the Select button, Data Extract fields can be moved from the Available Extract Field list to the Assigned Extract Field list.

Assigned Extract Fields
A list of all Assigned Extract Fields for the Merge Type is displayed. These Data Extract Fields will be available for inclusion in the Template document.

Select/Remove Buttons
By pressing the Select and Remove buttons, data fields may be assigned or unassigned for a particular Merge Type. Where fields are assigned or unassigned after the initial creation of a Merge Type document, the document should be re-accessed to ensure the format and included fields is correct.

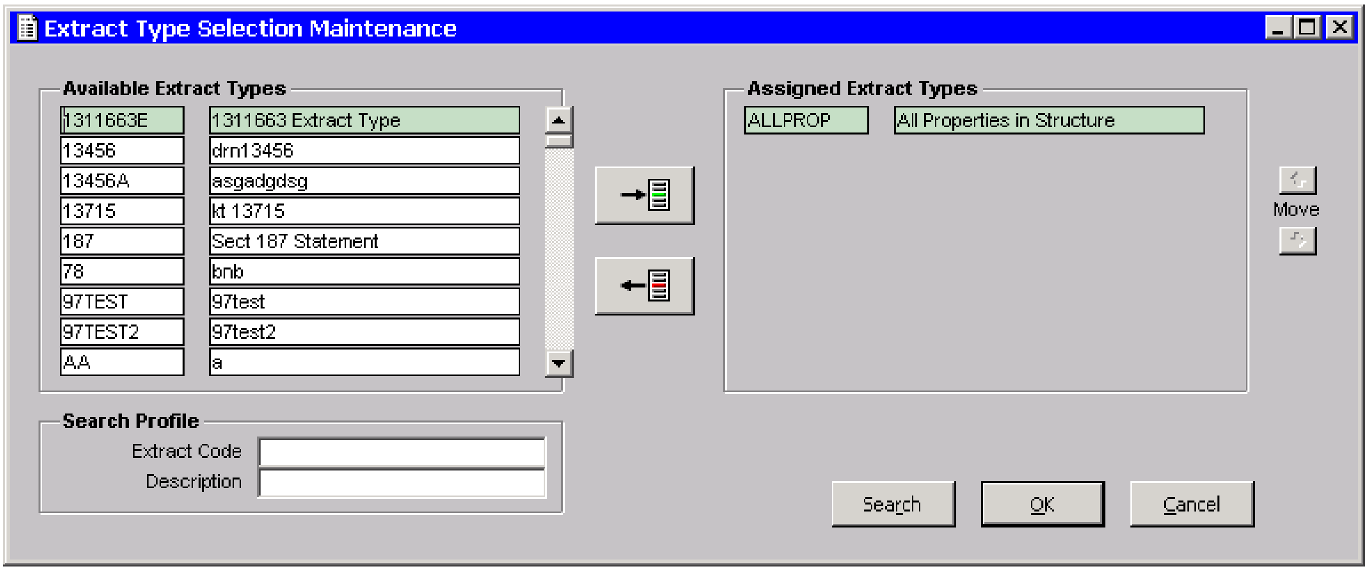
Search Profile - Field Name
Enter a Field Name on which to base your search and use the Search Button to initiate the search.

Wildcard Searching is available.
For example: Prop* will extract all Extract Fields starting with Prop.

Extract Type Selection Maintenance Form

The Extract Type Maintenance Form contains a list of the Available Extract Types that can be used to create an Assigned Extract Fields list.
By pressing the Select button, the Extract Type highlighted on the left side of the form is moved to the right hand side. The Remove button can be used to return Extract Types back to the default list.
All Extract Types on the right hand side will automatically be inserted into the Template document when it is created.

Note: If Extract Types are added or removed after the Template document has been created, the Template document should be edited and saved to ensure no data field conflicts occur.



Extract Type Selection Maintenance Form

Available Extract Types
A list of all Available Extract Types is displayed. By pressing the Select button, Extract Types can be moved from the Available Extract Type list to the Assigned Extract Type list.
(Refer to Chapter 4.0 for further information regarding Extract Types.)

Assigned Extract Types
A list of all Assigned Extract Types for the Merge Type is displayed. These Data Extract Types will be automatically inserted as Include statements when the Template document is created.

Select/Remove Buttons

By pressing the Select and Remove buttons, data fields may be assigned or unassigned for a particular Merge Type. Where fields are assigned or unassigned after the initial creation of a Merge Type document, the document should be re-accessed to ensure the format and included fields is correct.

Search Profile - Extract Code
Enter an Extract Code on which to base your search and use the Search Button to initiate the search.

Wildcard searching is available.
For example: P* will extract all Extract Types with an Extract Code starting with P.

Search Profile - Description

Enter a Description on which to base your search and use the Search Button to initiate the search.

Wildcard searching is available.
For Example: Property* will extract all Extract Types with a Description starting with Property

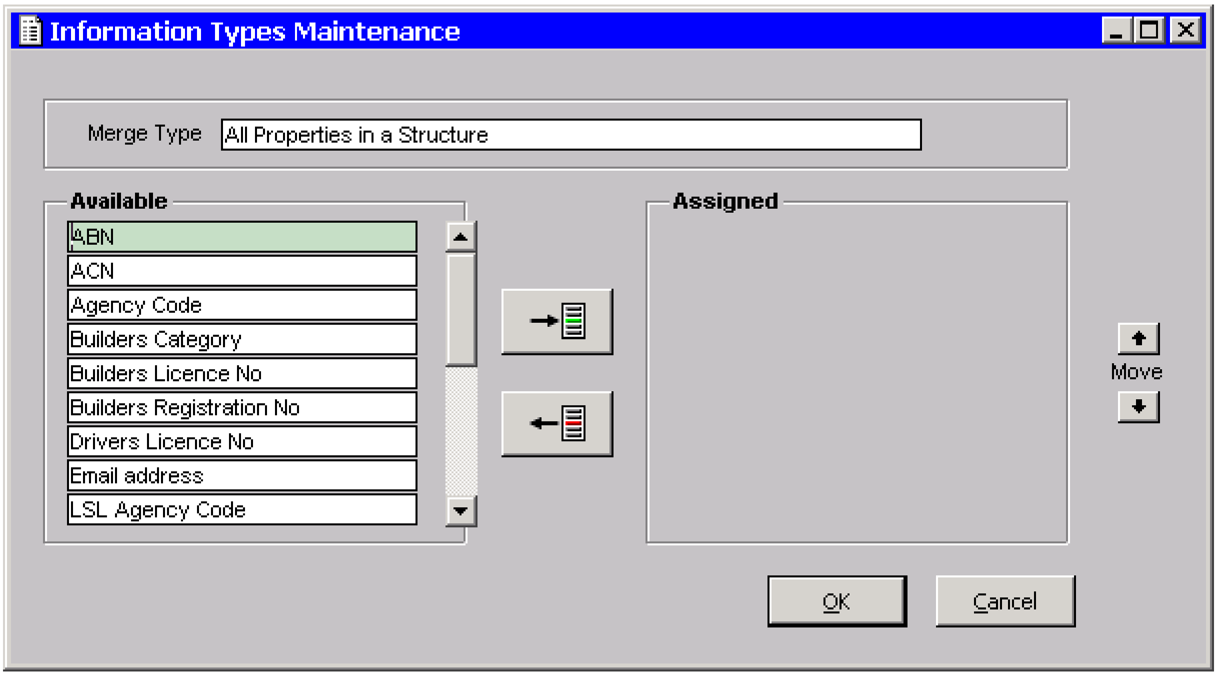
Move buttons

Allow you to move the Extract Types into the position you wish them to be displayed when they are assigned to the merge type.

Information Types Maintenance Form

The Information Types Maintenance Form contains a list of the available Information Types that can be used to create an Assigned Communication Fields list.
By pressing the Select button, the Information Type highlighted on the left side of the form is moved to the right hand side. The Remove button can be used to return Communication Types back to the default list. All Information Types on the right hand side will automatically be inserted into the Template document when it is created.

Note: A maximum of 6 Information Types will be displayed.



Information Types Maintenance Form

Merge Type
The name of the Merge Type you are assigning the Information Type to.

Available Field

A list of all available Information Types is displayed. By pressing the Select button, Communication Types can be moved from the Available list to the Assigned list.

Select/Remove Buttons

By pressing the Select and Remove buttons, data fields may be assigned or unassigned for a particular Merge Type. Where fields are assigned or unassigned after the initial creation of a Merge Type document, the document should be re-accessed to ensure the format and included fields are correct.

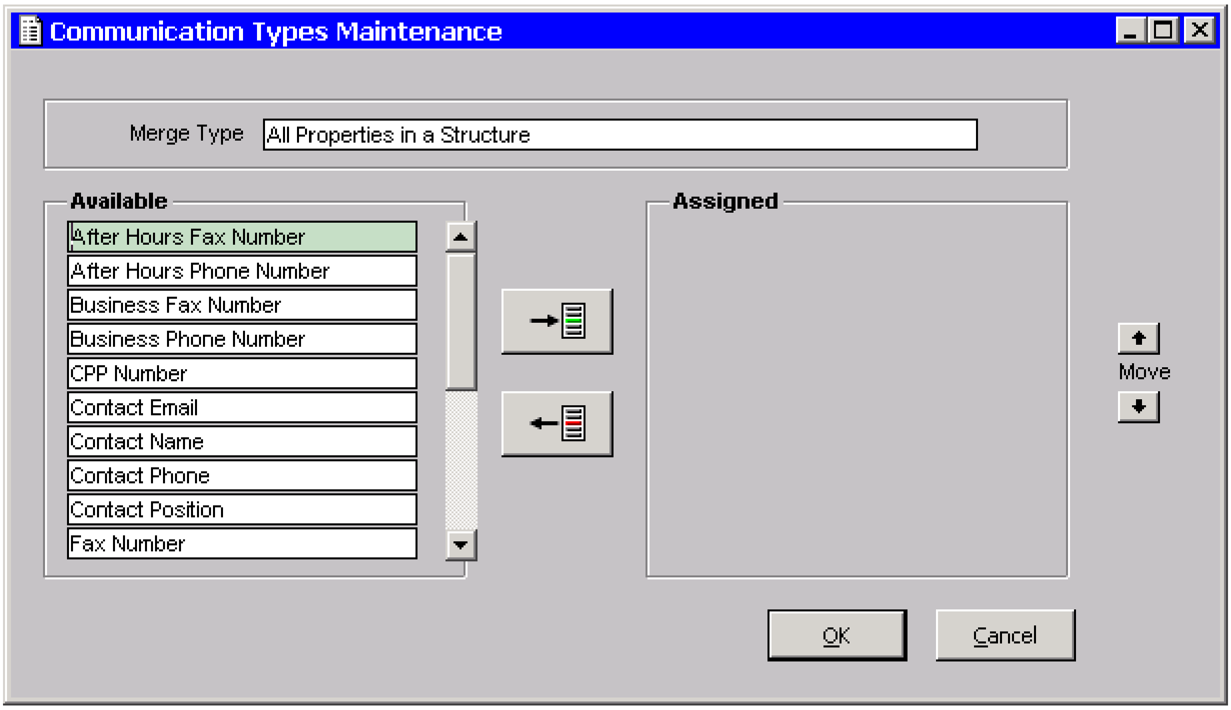
Assigned Field

A list of all Assigned Extract Types for the Information Merge Type is displayed.

Communication Types Maintenance Form

The Communication Types Maintenance Form contains a list of the Available Communication Types that can be used to create an Assigned Communication Fields list.
By pressing the Select button, the Communication Type highlighted on the left side of the form is moved to the right hand side. The Remove button can be used to return Communication Types back to the default list. All Communication Types on the right hand side will automatically be inserted into the Template document when it is created.

Note: A maximum of 6 Communication Types will be displayed.



Communication Types Maintenance Form

Merge Type

The name of the Merge Type you are assigning the Communication Type to.

Available Field

A list of all Available Communication Types is displayed. By pressing the Select button, Communication Types can be moved from the Available list to the Assigned list.

Select/Remove Buttons

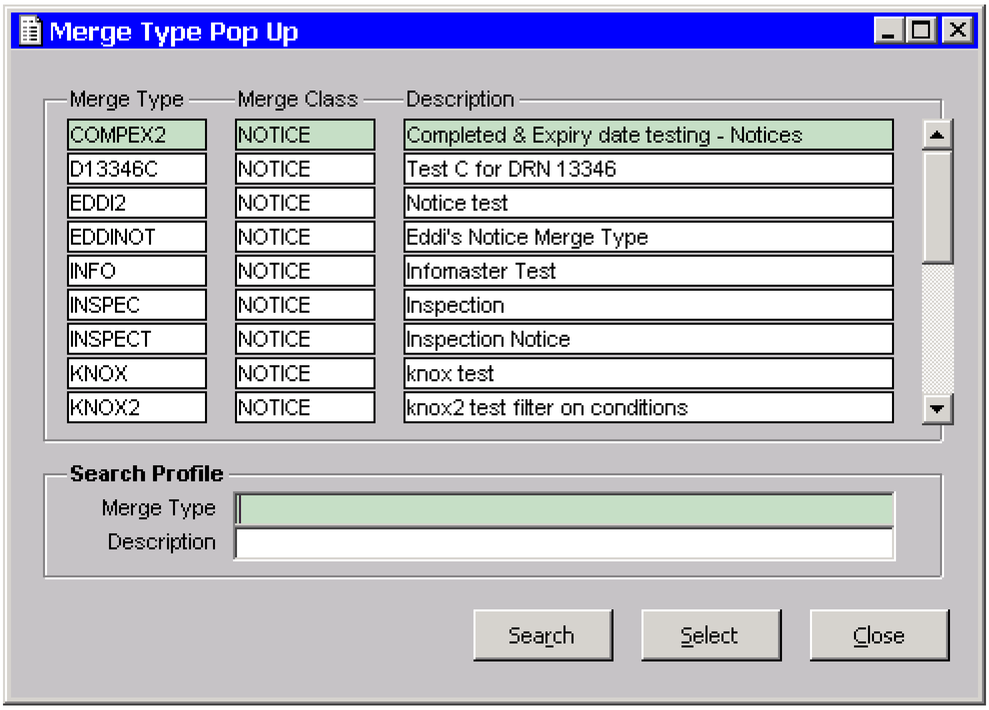
By pressing the Select and Remove buttons, data fields may be assigned or unassigned for a particular Merge Type. Where fields are assigned or unassigned after the initial creation of a Merge Type document, the document should be re-accessed to ensure the format and included fields are correct.

Assigned Field

A list of all Assigned Extract Types for the Communication Merge Type is displayed.

Merge Type Pop Up Form

The Merge Type Pop Up Form enables the required Name and Address Label document to be selected This option is accessed via Central Name and Address Maintenance. A list of current Merge Type Documents is displayed. The Merge Type Documents are defined via the Merge Type Parameter option.



Merge Type Pop Up Form

Merge Type
A list of available Merge Types will display. Only Active Merge Types will display in this list. The Search Profile can be used to select a particular Type from the list.

Description
For each Merge Type the related Description will display. The Description further identifies each of the Merge Types in the list.

Search Profile - Merge Type
Enter a Merge Type on which to base your search and use the Search Button to initiate the search.

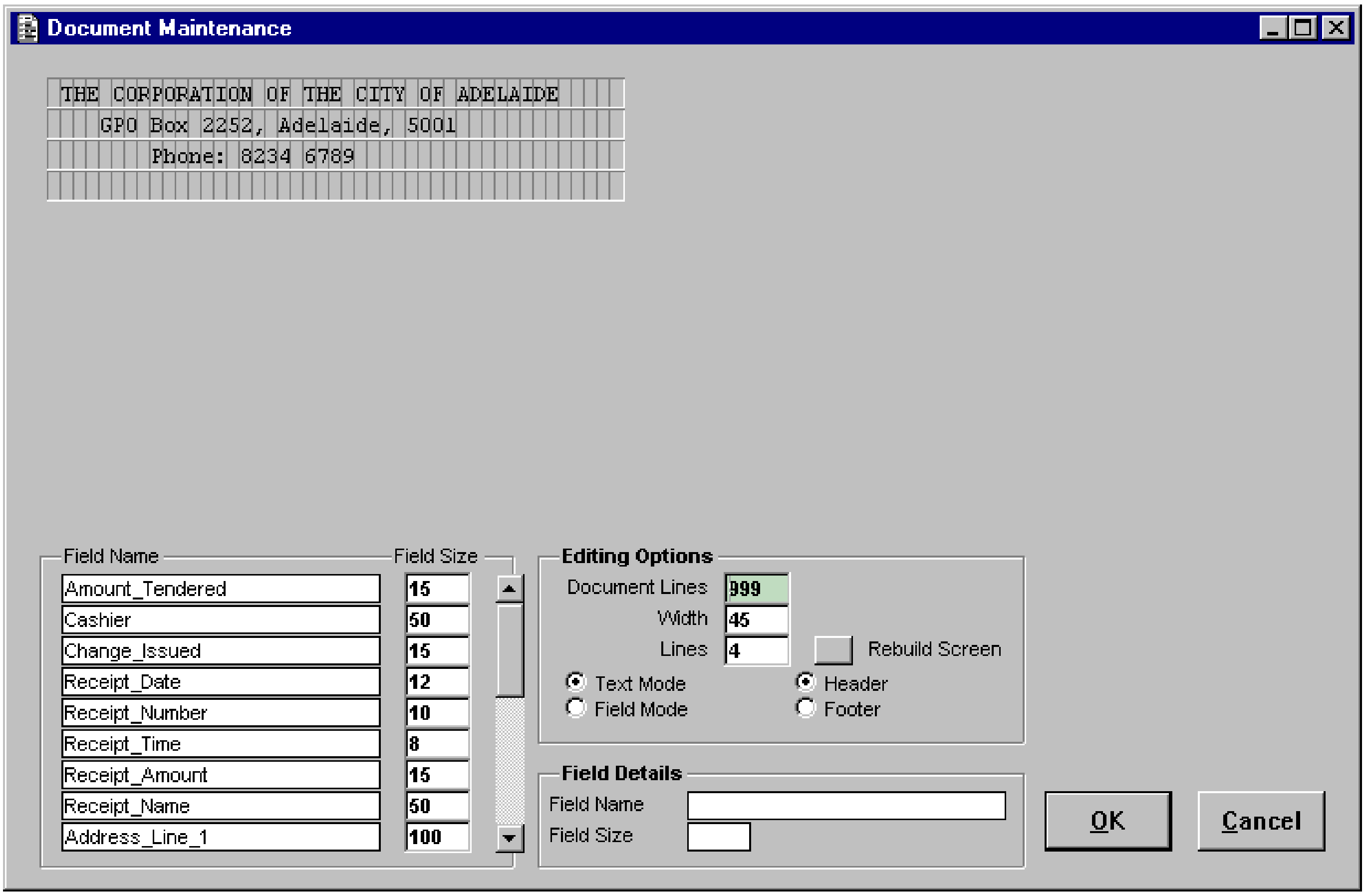
Wildcard searching is available on this field.
For example: P* will retrieve all Merge Types starting with P.

Search Profile - Description
Enter a Description on which to base your search and use the Search Button to initiate the search.

Wildcard searching is available on this field.
For example: P* will retrieve all Merge Types starting with P.

Document Maintenance Form

The Document Maintenance Form allows the setting up of header and footer details for the receipt document. The layout comprises Header details, followed by Allocation Line details, Payment Line details and Footer details. The Header and Footer details are user defined and can contain text and fields, in any layout desired. The document length and width can also be specified to allow for different printers.



Document Maintenance Form

Document Template
This field displays either the header or footer sections of the document and allows for user defined text or selected fields to be entered. The header details will appear at the top of the receipt document. The footer details will appear at the end of the receipt document

To add text to the document template, the user should select the Text Mode radio button, then place the cursor in the document where the text will begin, and begin typing.

To add a field to the document template, the user should select the Field Mode radio button, then select a field by clicking on it in the Field Name section, and then click in the required position in the document template. The field will be inserted in that position. If the field is too long, a message will alert the user to reduce the field size.

Field Name
This field displays a list of fields available for selection for inclusion in either the header or footer sections of the receipt document.

Field Size
This field displays the actual width of the fields in characters. If a field is too long to fit into the allocated space, then it may be made smaller. This will not, however, change the actual internal size of the field. It will only change how the field will appear in the receipt document. Any text which is longer than the modified field size will be truncated on the receipt.

Editing Options - Document Lines
This field allows the user to enter a document length in lines. For A4 size documents a specific length e.g. 58 lines, should be entered, so that amounts can be carried forward from page to page. For continuous rolls, as in slip printers, where no definite page breaks occur, this field should be set to 999.

Editing Options - Width

This field allows the user to establish a document width, in characters. For A4 size pages this could be set to 100. For slip printers, a recommended width would be 45.

Editing Options - Lines
This field allows the user to establish the number of lines to be allocated to the header or footer.

Editing Options - Rebuild Screen
This button should be selected in order to rebuild the screen, if changes have been made to either the Document Lines, Width or Lines fields.

Text Mode/Field Mode
The Text Mode button should be selected if the user wishes to enter text into the header or footer sections of the document.

The Field Mode button should be selected if the user wishes to select and place a field into the header or footer sections of the document.

Header/Footer
The header radio button should be selected to display or maintain the header section of the document.
The Footer radio button should be selected to display or maintain the footer section of the document.

Field Details - Field Name
This field displays the field name when the cursor is placed in a field on the document template.

Field Details - Field Size
This field displays the field size when the cursor is placed in a field on the document template. If the field size has been modified, then the modified size will display.

User Identification and Auto Signatures

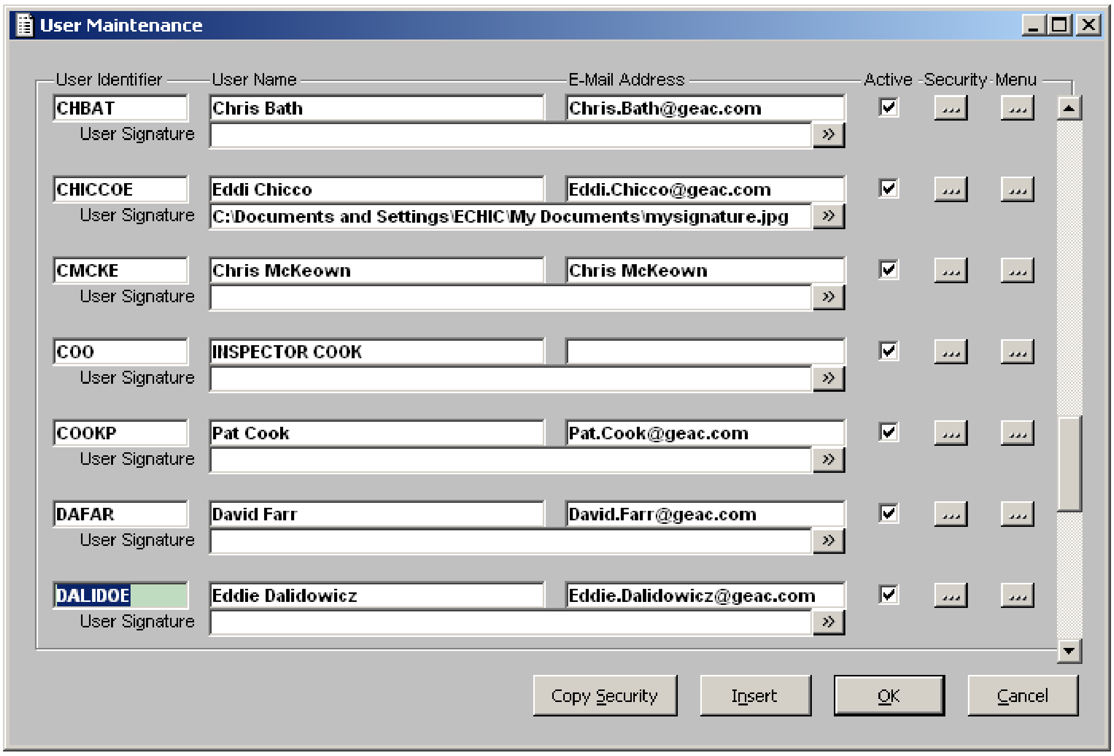
This release of Pathway incorporates enhancements that enable the capture of a User's Identification when documents are Requested, Generated and Final Printed.

The identity of the User that performs the Request, Generate and Final Print steps in the life cycle of a document will be recorded redundantly on the Document Link table at the time of each process. Both the User's Id and Name will be stored for future reference.

A corresponding enhancement to Pathway User Maintenance now permits the path to a Signature Image File to be stored for each User. This Signature File, along with the User Identifier and Name of the User that generates a document, are now being made available for inclusion on documents via new Extract Merge Fields.

User Maintenance

The "System Administration – Menu - User Maintenance" option has been enhanced to allow the definition of a file path to an Image File of a user's signature. This must be a valid file path statement. The Popup will cause a Windows 'FileBox' dialog to be displayed so that you may navigate to the location of the Image File.



Showing new field: User Signature

Merge Type Maintenance

The list of 'Document' management extract fields provided for inclusion on a Merge Type Template Document has been increased to include the following new fields:

Document_User_Id
Document_User_Name
Document_User_Signature

Note that the Document_User_Signature Merge Field will only return the UNC File Path to the user's Signature Image File. Therefore, in order to use this value, it is necessary to embed the Merge Field within an ‘IncludePicture’ directive. Within your document this should finish up looking like the following sample (Once the ‘Toggle Field Codes’ option has been selected for each field):

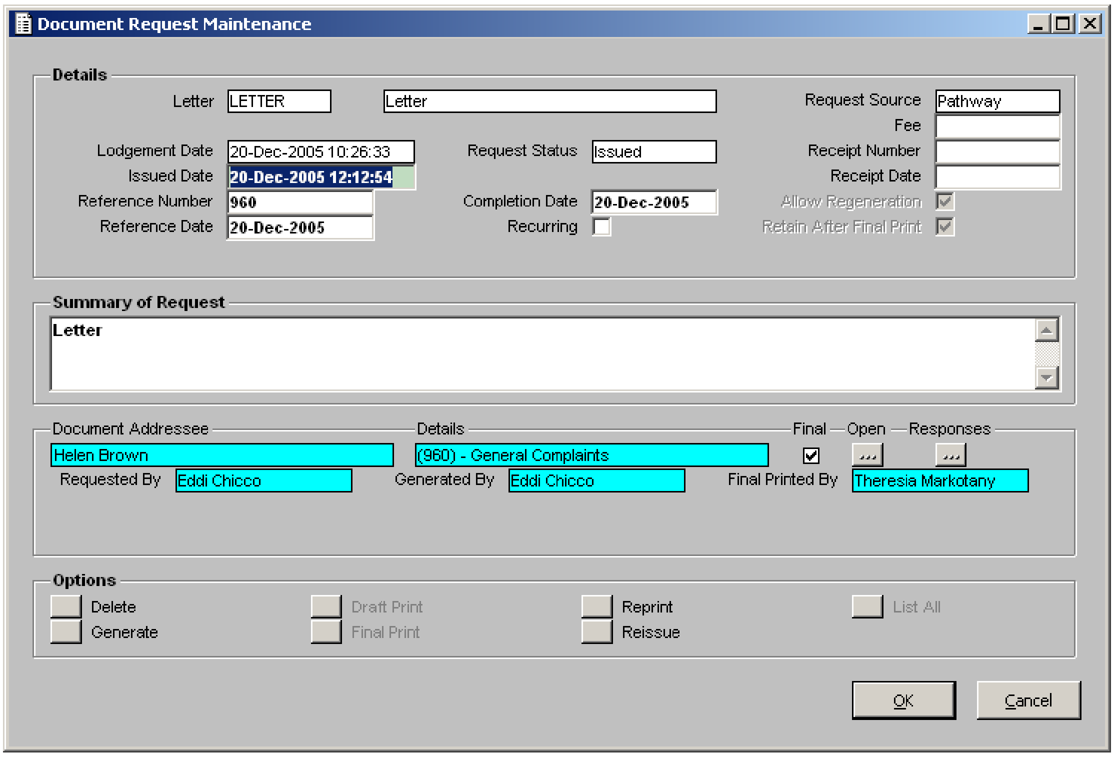
{INCLUDEPICTURE “{MERGEFIELD Document_User_Signature}” }

Note also that these Extract Fields refer to the identity of the User who generated a document. Where a document is re-generated, the user who performed the last generation is recorded for the document.

Document Request, Generation and Final Printing

Each Pathway Module will now benefit from the recording of user identities. This will occur both for documents produced Interactively, and those produced via Pathway Batch functions. Where a document is processed in Batch mode, the submitting User will be recorded on all documents processed by the Batch Job.

In addition to the provision of the new Merge Fields for the User who last performed a generation, the identities of the user at each step of the document life cycle will be available for display on the standard Pathway “Document Request Maintenance” form. Where no value is available the associated field will be dimmed on the form.



Showing new fields: Requested By, Generated By and Final Printed By

How to use the Document_User_Signature field in a Merge Document

The following steps may be followed to include a Signature Image file in a Pathway document:

1. In the Pathway Merge Type Maintenance Form, click on the Fields button
2. Assign the Merge Field Document_User_Signature
3. In the Merge Type Maintenance Form, click on the Edit detail button to open your Word Merge Document

4. Select the Microsoft Word Menu, Tools>>Options.

5. In the View tab, tick the Field codes check box and click OK. This will return you to your Word Document

6. Position your cursor in the document where you want the Signature to appear

7. Select the Microsoft Word Menu, Insert>>Field. The Microsoft Word Field popup box will appear

8. In the Field Names section double click on the word IncludePicture

9. The following statement will appear in your Word Document
   { INCLUDEPICTURE * MERGEFORMAT }

10. Place your cursor one space after the word INCLUDEPICTURE and insert the ‘Document_User_Signature’ Pathway Merge field

11. The statement will now appear as;
    { INCLUDEPICTURE { MERGEFIELD Document_User_Signature} * MERGEFORMAT }

12. Remove the, * MERGEFORMAT, from the statement.

13. The statement will now appear as;
    { INCLUDEPICTURE { MERGEFIELD Document_User_Signature} }

14. Enter " before the second open bracket and " after the first close bracket.

15. The statement will now appear as;
    { INCLUDEPICTURE "{ MERGEFIELD Document_User_Signature}"}

16. Return to Pathway and generate your document.

Document Request Processing

The following topics are covered in this section:

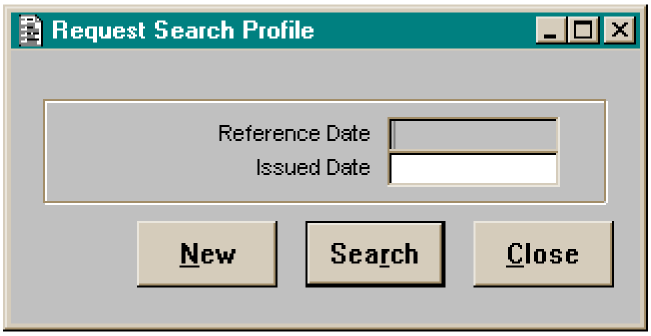
Document Processing

This section describes how to generate, edit, print and delete word processing documents via the application modules (e.g. Property Certificates, Application Letters, Miscellaneous Notices etc).

Note: To prevent errors occurring during a document merge, it is strongly suggested that no other word processing documents are opened whilst performing a merge. This recommendation prevents focus being applied by the Word processing software to the wrong document, which could result in the wrong document being printed.

Request Search Profile Form

This form enables a search process to be performed to identify the required Document Request. This may be required if searching on issued certificate, notice or letter documents. Searching may be performed on the reference and issued date fields of a document request.



Request Search Profile Form

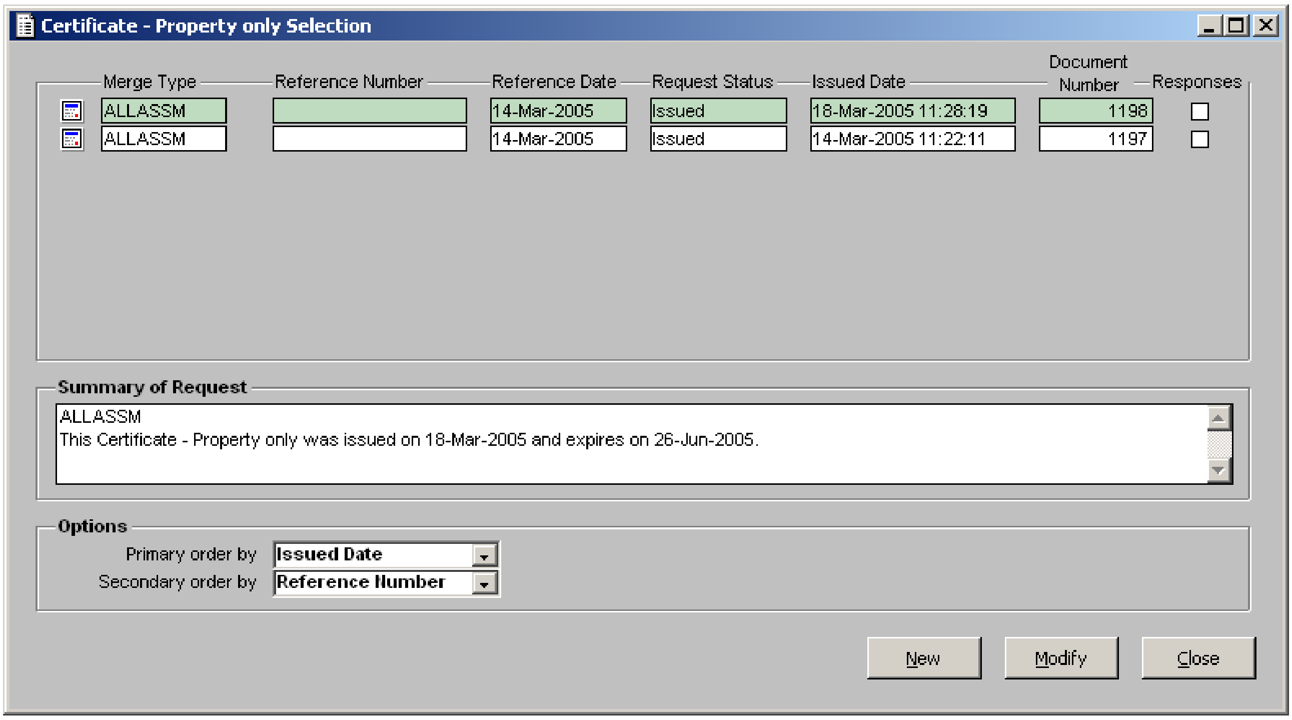
Reference Date
Enter a reference date on which to base your search and use the Search button to initiate the search. Using a double click or F2 on the field will initiate the Date Pop Up form to assist in the selection of the required date for searching.

Issued Date
Enter an issue date on which to base your search and use the Search button to initiate the search. Using a double click or F2 on the field will initiate the Date Pop Up form to assist in the selection of the required date for searching.

'Document' Selection Form

This form is used to select the documents associated with a property or application. The form title will reflect which documents are being selected (e.g. Miscellaneous Notices, Certificate etc). Selected details are shown on the selection form to assist in selection of the correct document request.

Note: If the specified document location cannot be found (due to a missing drive, etc) and the Pathway database is still active, the user will be able to view all document requests that have been raised against the particular Property, Customer Service Request, Application etc. When the user attempts to edit the document (perform a generation, print etc), an error message will be displayed to indicate that the document location could not be found. When the User attempts to delete the document request, if there is no associated document, the deletion will be carried out. If there is an associated document, a warning message will be given to indicate the physical document will not be deleted even though the document request will be deleted. The user will be able to choose to continue the processing or just simply cancel the deletion.



Document Selection Form

Merge Type

This field contains a list of the existing Merge Types for the selected Property or Application. No modification or deletion of this field is allowed. Glyphs are used to identify each merge type and to indicate a recurring notice.

Reference

This field contains an optional reference number to identify each document. No modification or deletion of this field is allowed.

Reference Date

This field contains an optional reference date to identify each document. No modification or deletion of this field is allowed.

Request Status

This field indicates the current status of a document request. No modification or deletion of this field is allowed. The Request status on a document request may be one of the following.

New	No Issued Date has been entered and no generation has been performed.
Issued	An Issued Date has been entered or a generation has been performed.
Expired	An Expiry Date has been entered which is less than the current date.
Completed	A Completion Date has been entered which is less than the current date

Issued Date

This field contains the date and time that a document was issued. No modification or deletion of this field is allowed.

Document Number

This field contains a unique system allocated document number. Documents will only be allocated document numbers if they are linked to a Merge Type which has an associated Numbering Scheme. This field is available for printing on documents.

Responses

If this checkbox is checked on, there are associated responses attached to the document.

Summary of Request

This field contains details for each of the listed Merge Types. This information includes an extended summary of the issue, expiry and completion dates (where applicable). The summary of request details assists in selection of the correct Merge Type.

Primary Order By

This field enables the order that the Merge Type records are displayed to be determined. This field is used in conjunction with the Secondary order field. Five options are available from the drop-down list

- Issue Date
- Merge Type
- Reference Date
- Reference Number
- Request Status

For example :
Primary Order Issue Date
Secondary Order Request Status
Merge Types will be displayed in Issue date order, starting with the most recent issue dates and for each Issued Date, within Status order.

Secondary Order By

This field enables the secondary order that the Merge type records are displayed to be determined. This field is used in conjunction with the Primary order field. Four options are available from the drop-down list.

- Merge Type'
- Reference Date
- Reference Number
- Request Status

For example :
Primary Order Issue Date
Secondary Order Request Status

Merge Types will be displayed in Issue date order, starting with the most recent issue dates and for each Issued Date, within Status order.

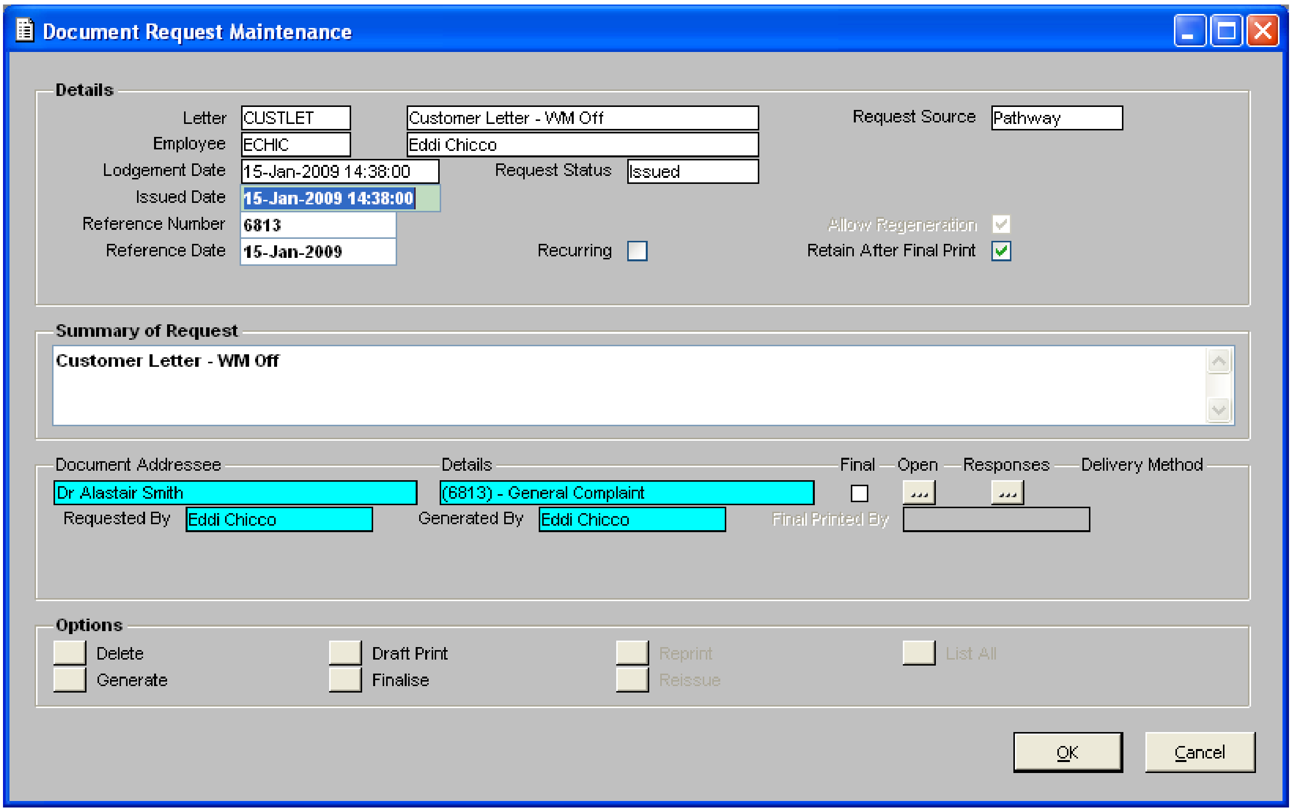
Document Request Maintenance Form

This form is used as the basis for producing all word processing requests. This form will be accessible via each of the application modules (e.g. Property, Applications etc). The available fields will depend on the Merge Types that are selected.

The various Option buttons will be available based upon the status of the documents shown on the Request (The 'Open' detail button is available because a document has been generated. The 'Draft Print' button is available because the Merge Type allows editing of documents.)

When there are multiple documents shown on this form the option buttons used will be validated such that the option must be able to be applied to all of the selected documents. For example, if the 'Draft Print' button is available then none of the selected documents can have been 'Final' printed.

Note: Users of the Dataworks Document Management system should note that the Précis value of printed documents will now be updated to reflect the type of print that was performed. I.e.: the Précis could be prefixed with "Draft Print:" or "Final Print", as the case may be. Also, once documents have been 'Final' printed, Dataworks will now treat the documents as 'Locked' or 'Frozen' and they will no longer be able to be altered via the Dataworks Document Management interface.



Document Request Maintenance Form

Merge Type

This field displays the selected Merge Type Document. The Merge Type is the skeleton document to be generated, which may be an Application Letter, Property Certificate etc.

Request Source

This field will display the source of the Document Request, i.e. Pathway or ePathway.

Employee

The Employee field displays the User Employee details which pertain to the current document. These details are determined initially at the merge type level but can in some cases be overridden at the Letter Maintenance level when the document is being created.

Fee

This field contains the fee associated with the document request. This is an optional field which may not be displayed for certain Merge Types. This field is available for printing on documents.

Lodgement Date

This field will default to the current date (and time if relevant). No modification or deletion of this field is allowed.

The format of this field will depend on the system level date and time format.

Request Status

This field indicates the current status of a document request. No modification or deletion of this field is allowed. The status will be updated during the generation process and will depend on the dates that have been entered. The Request status on a document request may be one of the following. This field is available for printing on documents

New	No Issued Date has been entered and no generation has been performed.
Issued	An Issued Date has been entered or a generation has been performed.
Expired	An Expiry Date has been entered which is less than the current date.
Completed	Completion Date has been entered which is less than the current

date

Issued Date
This field contains the date that a document was issued. If left blank, the issued date will default to the current date during the document generation process. This field is available for printing on documents.

Reference Number
This field contains an optional reference number to identify the document being generated. This field is available for printing on documents

Reference Date
This field contains an optional reference date to identify the document being generated. This field is available for printing on documents.

Allow Regeneration
If this checkbox is checked on, a document which has been generated may be regenerated as required (e.g. after changes to a Property). The Allow Regeneration option will default as checked on when creating a new document request and may be checked off during the request entry process if required.

Recurring
If this checkbox is checked on, the document is flagged as recurring. Recurring notices may be identified to enable bulk selection and printing via the Document Batch Processing option. The recurring default is set as a Merge Type Default.

Expiry Date
This field contains the date that a document request expires. Once this date has passed, the status of a document request will be adjusted. This is an optional field that may not be displayed for certain Merge Types. This field is available for printing on documents

Completion Date
This field contains the date that a document request is completed. Once this date has passed, the status of a document request will be adjusted. This is an optional field which may not be displayed for certain Merge Types. This field is available for printing on documents

Receipt Number
This field contains the receipt number associated with document requests which require a payment. For example, receipts taken for Property Certificate Searches may be entered. This field is available for printing on documents.

Receipt Date
This field contains the receipt date associated with document requests which require a payment. The receipt date will be used in conjunction with the receipt number field. This field is available for printing on documents.

Retain After Final Print
If this checkbox is checked on, word documents will be retained after they have been printed, to enable editing and further reprints if required. If the checkbox is checked off, printing a document will remove that document from the system. The document request will remain and the document will need to be regenerated if a reprint is required. The default on this parameter will depend on the ‘Retain After Printing’ option which is specified on the Merge Type. (Refer to the Merge Type Maintenance chapter for further details regarding defining Merge Types.) This flag setting can be overridden by the ‘Retain After Printing’ flag setting on the Batch Processing form.

Summary of Request
This field contains a summary of the document request. The summary details will default to the Description on the selected merge type, but these details may be replaced or extended as required. This field is available for printing on documents (via the Extract List options of Certificates and Miscellaneous Notices).

Document Addressee
This field contains a list of the selected document addressees for a particular document request. Property certificates allow only one Document Addressee to be linked to a request. Property Notices and Application Letters enable multiple properties (and therefore multiple addressees) on each request.
The Document Addressee field is in multi selection mode. This enables one or more addressee to be selected in order to perform the Generate, Print and Delete functions.

When this form is used with Responses, it will list a name for each Response selected. If more than one name is linked to a response the first name will be listed as the Document Addressee. Also the Respondent name listed will be overridden with the name used on the Response Maintenance form, if entered. If there is more than one name on the Response and the concatenation of those names is greater than 25 characters, the name will be listed as “first person and others”.

Details
This field displays further details such as the Property Address, or Application Number etc.. This assists in providing further information, especially where large numbers of Document Addressees have been linked to one request.

Final Flag
This flag will be checked ON following a ‘Final Print’ of the document to indicate the document has been finalised, whereupon the ‘Reprint’ and ‘Reissue’ options buttons will become available.

Open Document Button
By pressing this button, the existing generated document may be viewed and/or edited via the selected word processing package. The ability to edit a generated document will depend on the parameter setting ‘Edit Document’ on the nominated Merge Type. Refer to Chapter 4 for further information regarding the Merge Types and their defaults. Where no generation has occurred, the edit document button will be dimmed and cannot be accessed.

Responses Button
By pressing this button, a list of responses to the generated document may be logged.

Delivery Method
The *Delivery Method* field has been made available against each listed name on the form when the site is authorised to the Electronic Document Delivery function. It has four possible values, *(default)*, *Post*, *E-mail* and *Fax*, and allows the *Preferred Delivery Method* value specified against a particular name or name role to be overridden on a document-by-document basis.

Requested By
This field displays details of the Document Requestor’s User Name. This will be the User logged on to Pathway at the time of requesting the Document.

Generated By
This field displays details of the User performing the Document Generation. This will be the logged on User.

Final Printed By

List All
This field enables a full list of Document Addresses for a document request to be viewed. When accessing the Document Request Maintenance form via property maintenance, only the addressee related to that property will display initially. The list all checkbox enables other related addressees to be displayed to assist in generation, printing and deleting.

Generate Button
By pressing this button, the generation process will run interactively. A document merge will be processed, for the nominated document, for each of the selected document addressees. The time taken to complete a merge will vary depending on the number of extracts in the document and the number of document addressees selected.

Note: Starting up the selected word processing product prior to performing a generation will speed up the time taken to complete the merge.

Draft Print Button
This button is only available when the Merge Type allows editing of documents. If the selected document has not been generated then it will be generated before being printed. If the selected document has already been generated then it will only be printed. This option will not regenerate existing documents.

Note: Users of the Dataworks Document Management system should note that the Précis value of printed documents will now be updated to reflect the type of print that was performed. I.e.: the Précis could be prefixed with “Draft Print:” or “Final Print”, as the case may be. Also, once documents have been ‘Final’ printed, Dataworks will now treat the documents as ‘Locked’ or ‘Frozen’ and they will no longer be able to be altered via the Dataworks Document Management interface.

Final Print / Finalise Button

This option will print or finalise the document and will remove any ‘Draft’ Watermark before doing so. If the selected document has not been generated then it will be generated before being printed / finalised. If the selected document has already been generated then it will only be printed or finalised. This option will not regenerate existing documents. Once a document has been ‘Final’ printed or Finalised, it will no longer be able to be edited. A warning message will display prior to performing a ‘Final’ print / Finalise process.

Note: Users of the Dataworks Document Management system should note that the Précis value of printed documents will now be updated to reflect the type of print that was performed. I.e.: the Précis could be prefixed with “Draft Print:” or “Final Print”, as the case may be. Also, once documents have been ‘Final’ printed, Dataworks will now treat the documents as ‘Locked’ or ‘Frozen’ and they will no longer be able to be altered via the Dataworks Document Management interface.

Delete Button

By pressing this button, the selected document addressees will be removed from the Document Request. If all document addressees are selected, the document request and associated document will also be removed (removing the history details associated with this request). Where a Document Request has been final printed, only the UserID that has been defined as the ‘Administration User’ within the Pathway System Parameters will be permitted to delete the Document request record.

Reprint Button

This option will only be available for those documents that have been ‘Final’ printed. It will produce a hard copy reprint of the document. No updates will occur as a result of a reprint.

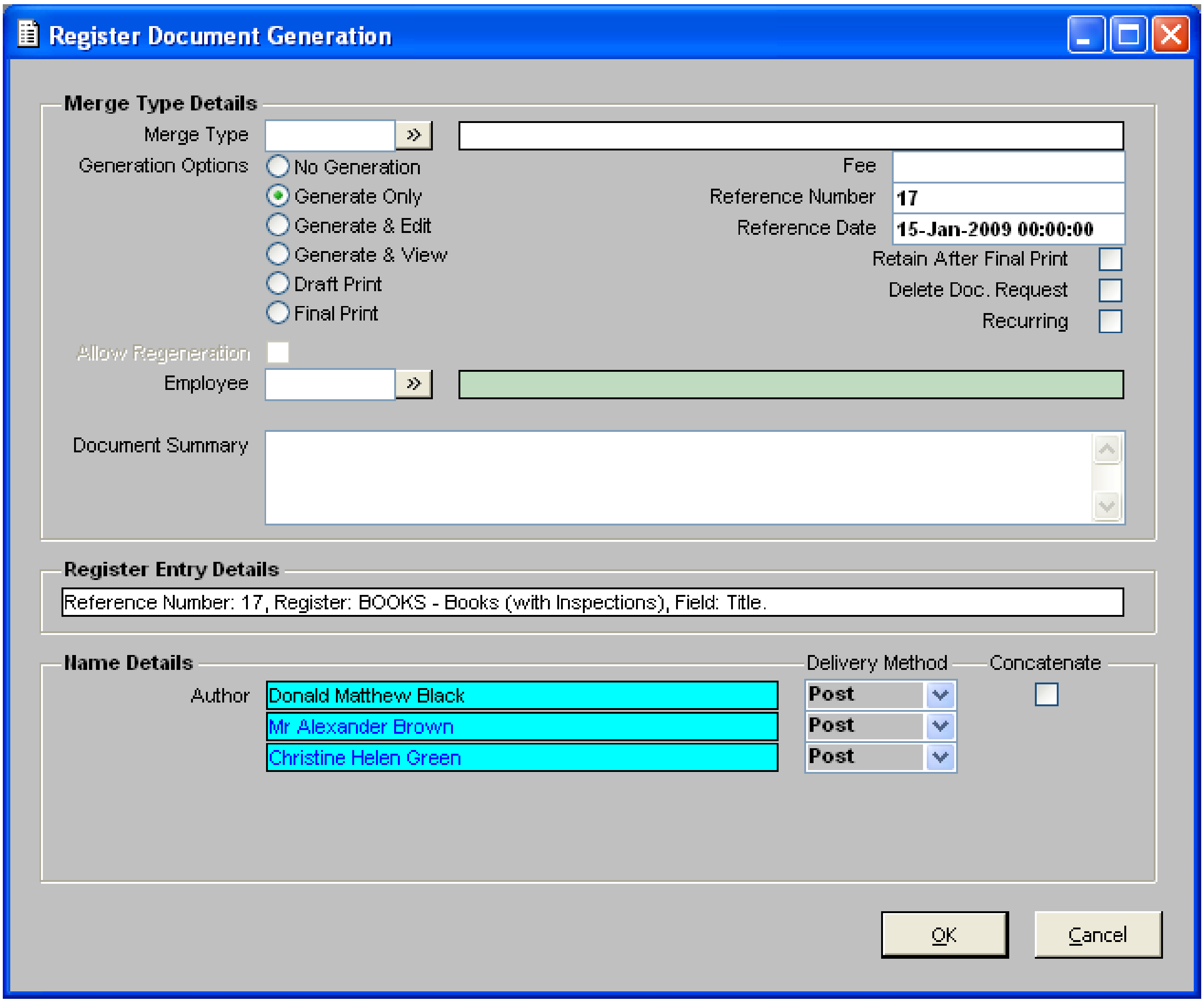
Reissue Button

This option will only be available for those documents that have been ‘Final’ printed. It will reprint, or email, as appropriate the selected documents. This will be equivalent to performing a ‘Final’ print and the printed dates etc will be updated to reflect this.

Document Generation Form

The Document Generation form is a generic function form to allow for the selection of addresses and subsequent creation of Document Requests. This form is used by Customer Service, Registers and Property when the ‘New Document Request’ option is used from Inspections. It displays the Application details along with a list of Names derived from the Register, Request or Property entry. It is also used when the Send Button is selected on Application Names and Licensing Names.

Note: You may not need to have any Names linked to the application occurrence for the document to be generated. The Merge Type may be defaulted if a default has been set up on the Inspection Parameters. The list of Names will be grouped by their application Field Names (equivalent to Role Types). The ‘Concatenate’ flag is available for each group, and if checked on, all Names selected within that group will be concatenated.



Inspection Document Generation form

Merge Type

This field enables the Merge Type Document to be selected for each generation. The Merge Type is the skeleton document to be generated, which may be an Application Letter, Property Certificate etc.
The popup button enables a Merge Type to be selected from the available list. The list displayed will be tailored, depending on where the Document Request Maintenance form is being used.
For example:
If producing a Property Certificate document, only ‘Certificate’ Merge Types will be displayed in the list.
The Merge Type may be defaulted if a default has been set up on the Inspection Parameters.

Generation Options

The following options will be available for document generation:

- No Generation – This creates the document request without generation of the document.
- Generate Only – This option creates the request and generates the document. The document may be printed at a later date using one of the Print options or the Batch Print Facility.
- Generate & Edit – This option creates the request and generates the document. The document is automatically loaded for editing via Document Maintenance. When multiple documents are generated only the first document is automatically loaded for editing. After returning to Pathway from the edited document the Document Maintenance form will be available for any other documents to be selected for editing as required. This option can only be used when the selected Merge Type allows editing.
- Draft Print – This option creates the request, generates the document plus performs a Draft print of the document (which includes the watermark). This option can only be used when the selected Merge Type allows editing.
- Final Print / Finalise – This option creates the request, generates the document plus performs a Final print, or Finalisation of the document.

Fee
This field contains the fee associated with the document request. This is an optional field which may not be displayed for certain Merge Types. This field is available for printing on documents.

Reference Number
This field contains an optional reference number to identify the document being generated. This field is available for printing on documents. It allows alphanumeric data.

Reference Date
This field contains an optional reference date to identify the document being generated. This field is available for printing on documents.

Retain After Final Print
If this checkbox is checked on, the document will be retained after it has been printed, to enable editing and further reprints if required. If the checkbox is checked off, printing the document will remove it from the system. The document request will remain and the document will need to be regenerated if a reprint is required. The default on this parameter will depend on the 'Retain After Printing' option which is specified on the Merge Type. (Refer to the Merge Type Maintenance chapter for further details regarding defining Merge Types.) This flag setting can be overridden by the 'Retain After Printing' flag setting on the Batch Processing form.

Delete Document Request
If this checkbox is checked on, the 'Retain After Final Print' checkbox will become checked off as they are mutually exclusive. The Document Request will be deleted after a Final Print.

Recurring
If this checkbox is checked on, the document is flagged as recurring. Recurring documents may be identified to enable bulk selection and printing via the Document Batch Processing option. The recurring default is set as a Merge Type Default.

Allow Regeneration
If this checkbox is checked on, a document which has been generated may be regenerated as required (e.g. after changes to a Property). The Allow Regeneration option will default as checked on when creating a new document request and may be checked off during the request entry process if required.

Employee

The Employee field displays the User Employee details which pertain to the current document. These details are determined initially at the merge type level but can in some cases be overridden at the Letter Maintenance level when the document is being created.

Document Summary
The Document Summary field allows a summary description to be added to the Document Request.

Details
This field displays further details such as the Property Address, Application Number, Register details etc.. This assists in providing further information, especially where large numbers of Document Addressees have been linked to one request.

Name Details
The Name Details field contains a list of the selected document addressees for a particular document request.
The Document Addressee field is in multi selection mode. This enables one or more addressees to be selected in order to perform the Generate, Print and Delete functions.

The list of Names will be grouped by their Role Type (or Register Field Code).

Note: When an Inspection / Register Document Generation is run via Registers you do not need to have any Names linked to the Register for the document to be generated. In such an instance, the Document Addressee will be referred to as 'Unknown Addressee'.

Note: When an Inspection Document is generated for an Application, it will initially default the generation of the letter to the Applicant(s) only instead of all Names linked to the Application. The ability to then select/deselect other Names is available.

Delivery Method

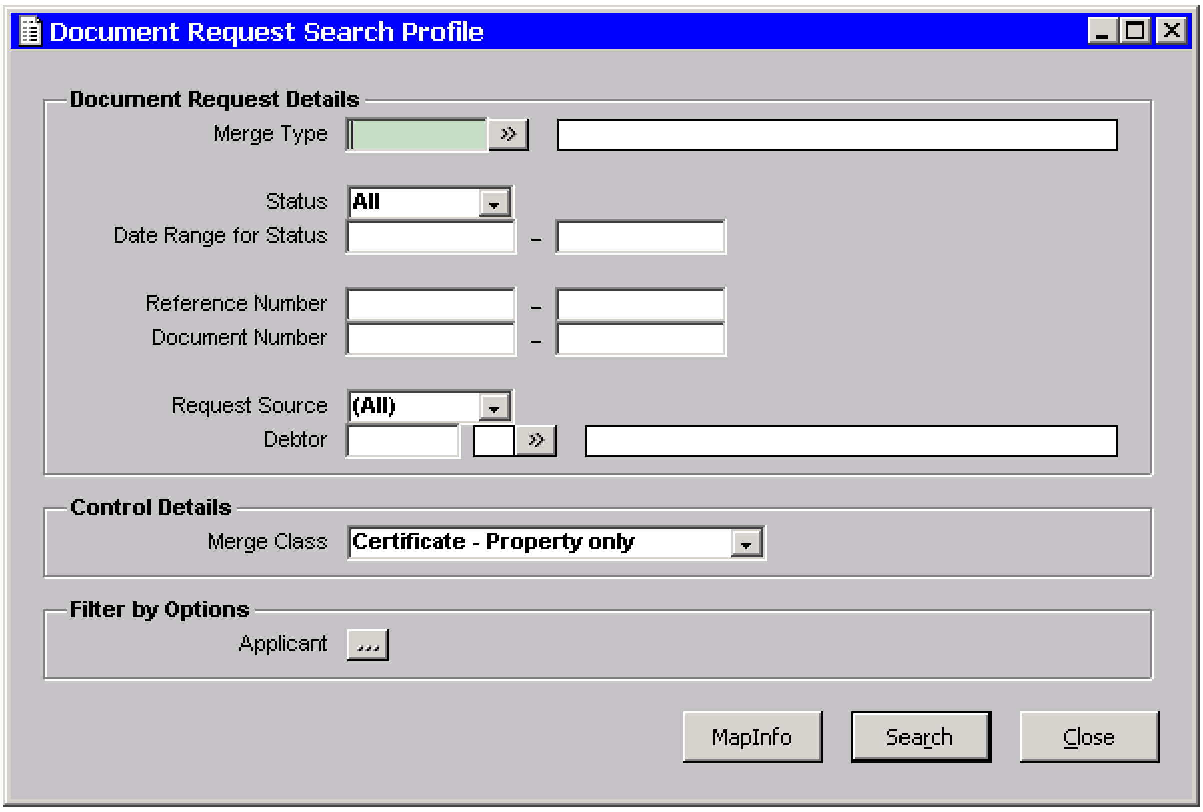
The *Delivery Method* field has been made available against each listed name on the form when the site is authorised to the Electronic Document Delivery function. It has four possible values, *(default)*, *Post*, *E-mail* and *Fax*, and allows the *Preferred Delivery Method* value specified against a particular name or name role to be overridden on a document-by-document basis.

Concatenate

The Concatenate flag is available when more than 1 name exists within a Role Type or Register Field, and if checked on, all Names selected within that field will be concatenated.

Request Search Profile Form (from Property)

The Request Search Profile form displays when the Notices and Certificates Option button is selected from the Property Address Search Profile. It allows the Property search to be filtered by document requests.



Request Search Profile Form (via Property Search Profile)

Merge Type

Key in a valid Merge Type or select one from the Pop Up.

Status

Select a Document Status from the drop down list. The available choices are:

- All
- Completed
- Expired
- Issued
- New

Date Range for Status

Enter a date range for the Document Status. Entering a range of dates will ensure only those documents whose Status date falls between the date range will be retrieved.

Reference Number

Enter a Reference Number range on which to conduct your search.

Document Number

Enter a Document Number range on which to conduct your search.

Request Source

Select a Request Source from the drop down. The available options are:

- Pathway
- ePathway
- (All)

The default will be (All).

Debtor

Enter a valid Debtor Number or click the Pop Up button to activate the Debtor Search Profile.

Control Details - Merge Class

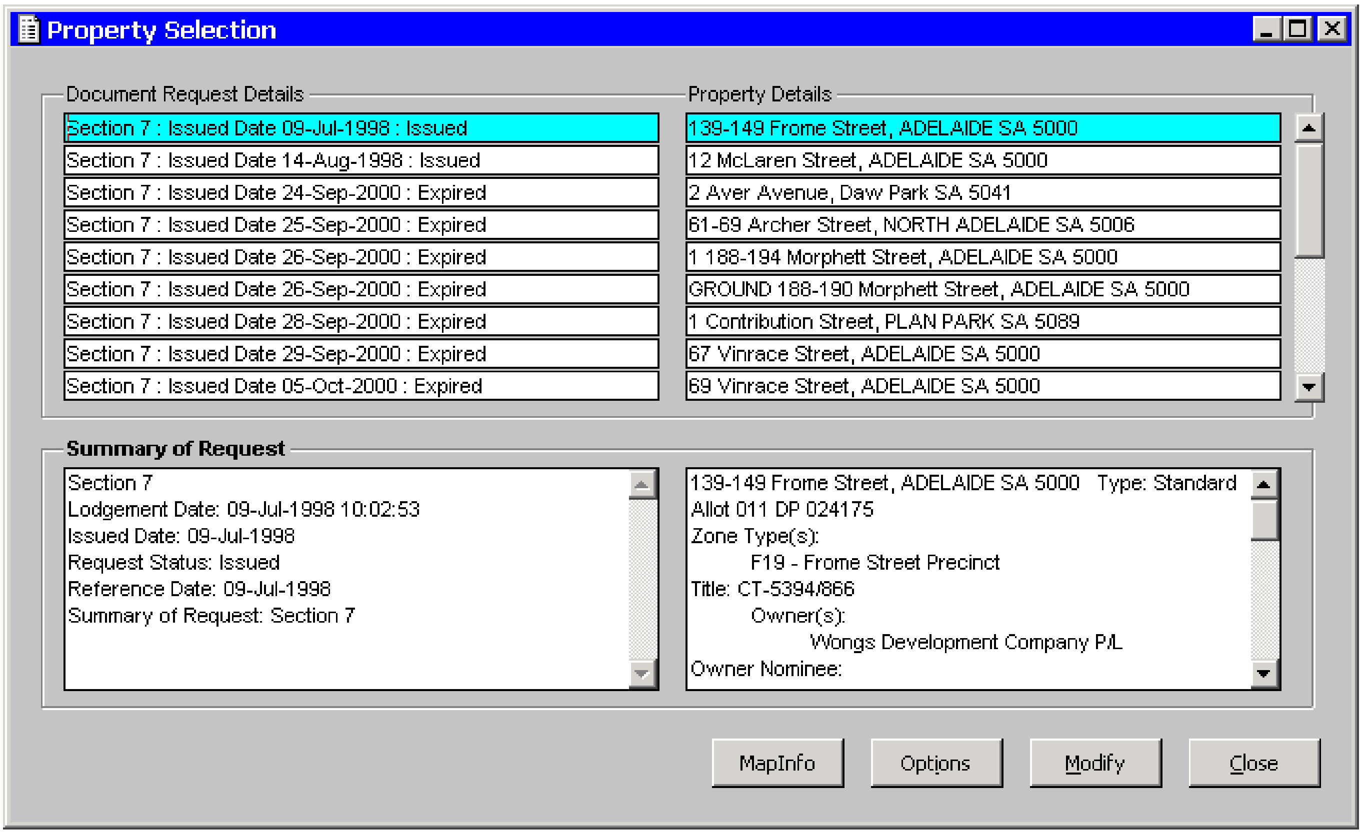
Select a Merge Class from the drop down. Available choices are:

- Certificate - Property only
- Miscellaneous Notice - Property

Filter by Options - Applicant Button

Selection of this button activates the Document Issued - Name Search Profile which allows the user to select a name.

Property Selection Form



Property Selection Form

Document Request Details

This field displays the Merge Type and Status of the document/s retrieved by the Search Profile. This field is display only.

Property Details

This field displays the Property details associated with the Document Request. This field is display only.

Summary of Request

These fields display other Document and Property details for the Document Request.

Electronic Document Delivery

Note: This is an Authorised Function. Please contact your Account Manager for further details.

It has previously been possible to deliver Word Processing documents by e-mail when the relevant document request is associated with a Customer Profile application function, such as *ePathway Certificate Request*. This has been achieved by means of a background job queue that runs processes to convert Word documents to PDF files and send them to recipients through an e-mail client.

The facility to deliver documents by e-mail has been extended to all Pathway modules linked to Word Processing, for sites authorised to the new *Electronic Document Delivery* function. In addition, sites with appropriate third party fax server software, or an equivalent internet service, can also use the new function to deliver documents by fax. Name and Address has been modified to allow a preferred delivery method to be recorded against a name and/or a name role, and Word Processing has been modified to take preferred delivery methods into account, and to allow an override delivery method for individual documents.

Note: Please refer to the Setup Instructions at the end of this section for more information about configuring Pathway to use Electronic Document Delivery.

Customer Profile System Parameter Maintenance

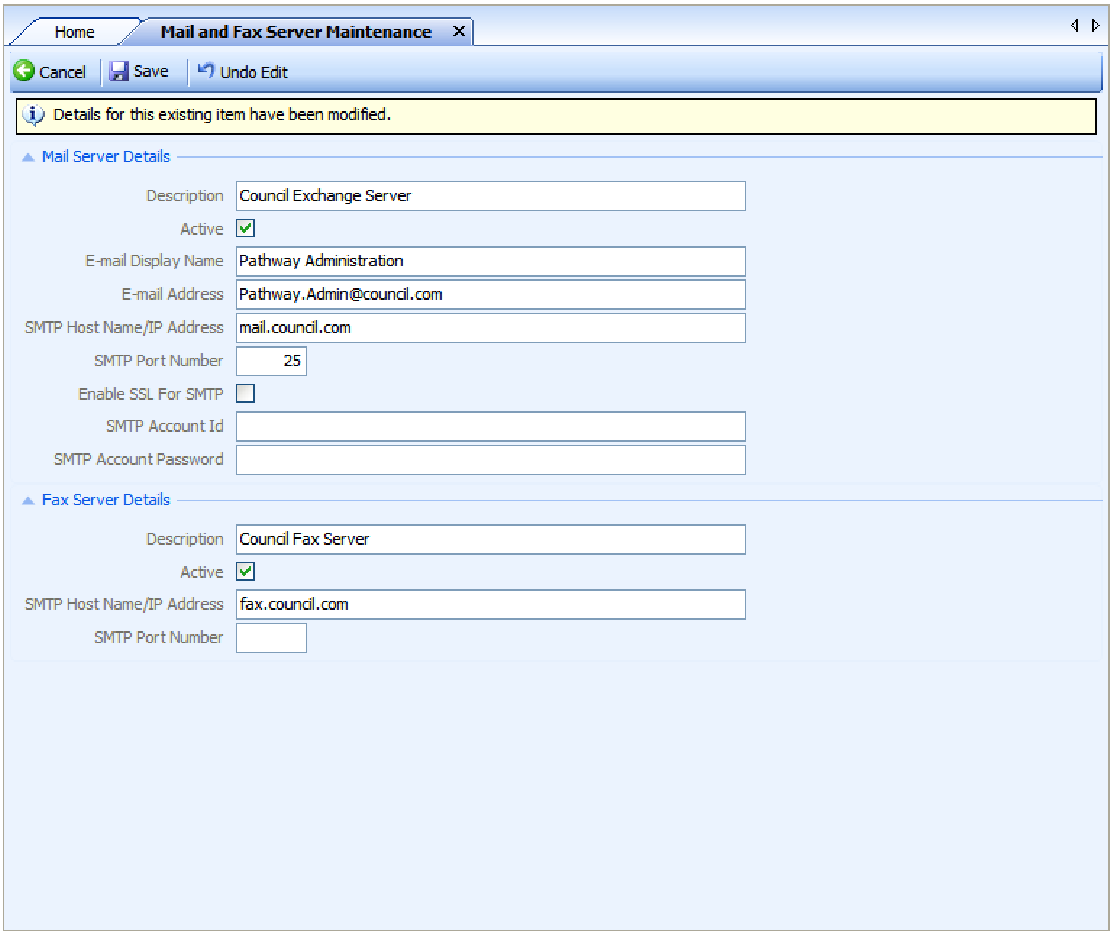
This function now includes a new *Fax Communication Types* field group. These indicate which of a name's communication details contains the fax number to be used when sending correspondence electronically via a fax server. There is one communication type for personal names, and one for companies.

The *Personal Name* field allows selection of one communication type from all communication types set up in the Name and Address Parameters >> Communication Type Parameters option as 'Applies to' either *Personal Name* or *Person & Company*.

The *Company Name* field allows selection of one communication type from all communication types set up in the Name and Address Parameters >> Communication Type Parameters option as 'Applies to' either *Company Name* or *Person & Company*.

Mail & Fax Server Maintenance

The System Administration >> System Parameters >> Mail Server Maintenance menu option has been renamed Mail & Fax Server Maintenance, and includes a new group box with fields for storing fax server details. This option is only accessible from the smart client, which means that before sites can use this new functionality, they need to have configured a Pathway application server and installed at least one instance of the smart client. The new group box is illustrated below.



The smart client Mail & Fax Server Maintenance form, showing the new Fax Server Details group box.

The new group box contains a subset of the fields in the *Mail Server Details* group box. This is because fax server details are only required in order to construct an SMTP address using a fax number and host name. The new fields are:

Description. A suitable description for the fax server should be entered here.

Active. This field is reserved for future use, and should remain checked on.

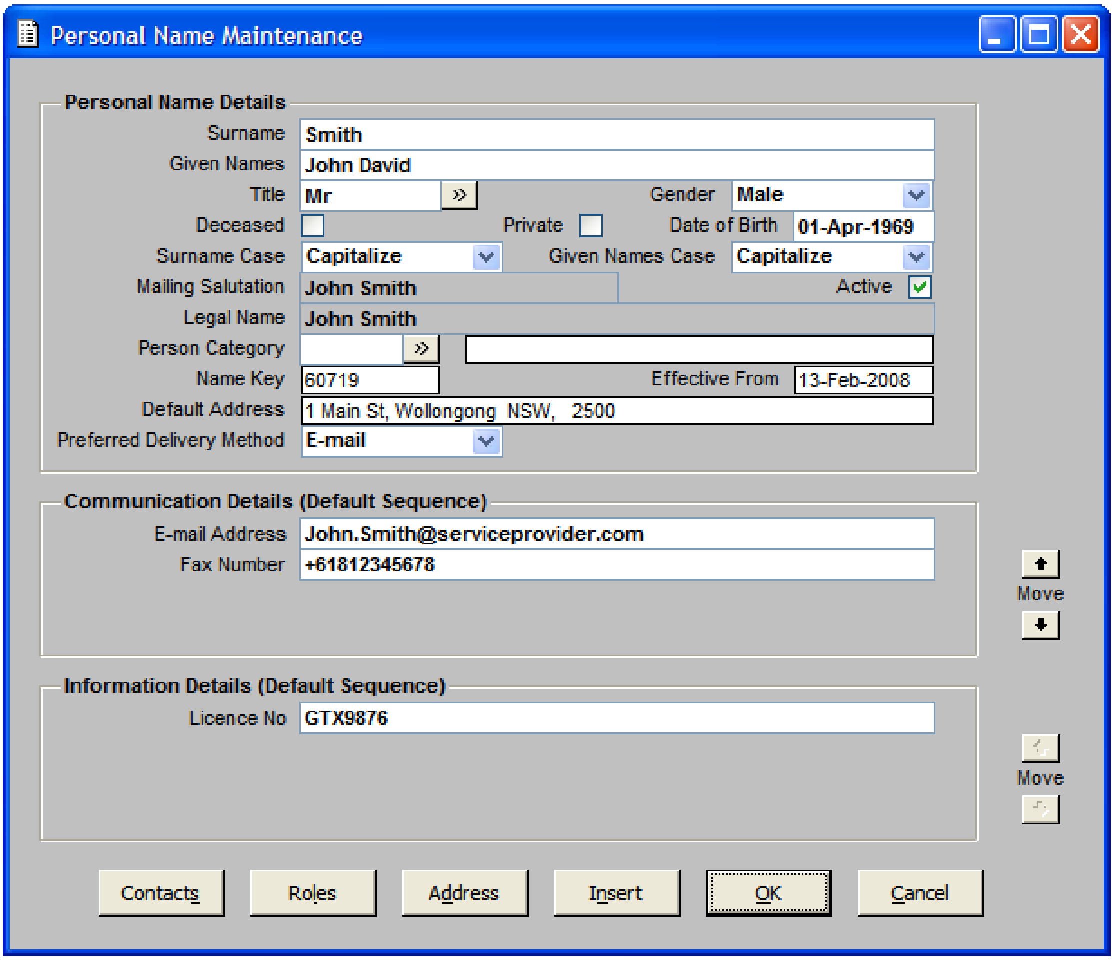
SMTP Host Name/IP Address. The name or address of the fax server that acts as an SMTP host and converts e-mail messages to fax transmissions. This field will be used in conjunction with fax numbers stored as communication details against names to construct e-mail addresses of the form *faxnumber@faxserver*, e.g. *+61812345678@fax.council.com*.

SMTP Port Number. If the fax server requires communication through a special port, the port number should be entered here.

If a site is not authorised to the Electronic Document Delivery function, the *Fax Server Details* group box is hidden, and an informational message is displayed to indicate that fax server details cannot be maintained.

<u>Name Maintenance</u>

This function now includes a *Preferred Delivery Method* drop-down field. The new field has four possible values, *(unknown)*, the default, and *Post*, *E-mail* and *Fax*. If *(unknown)* or *Post* is selected for a particular name, Word Processing documents will by default be printed, and will need to be physically sent to the recipient. If *E-mail* or *Fax* is selected, Word Processing documents will be converted to PDF files and sent to the recipient electronically. A warning message is displayed if *Fax* is selected when no fax details have been specified in Mail & Fax Server Maintenance.



Name Maintenance form showing new Preferred Delivery Method field.

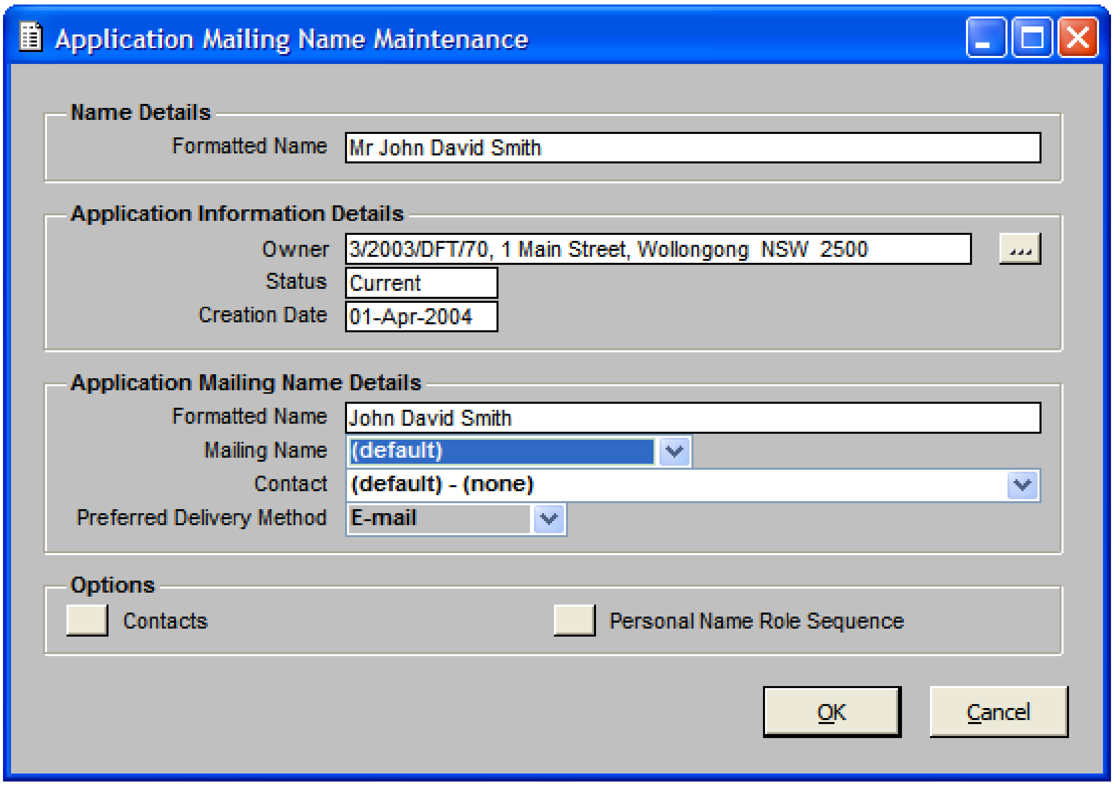
<u>Application Mailing Name Maintenance</u>

This form now shows a new *Preferred Delivery Method* drop-down field when a site is authorised to the Electronic Document Delivery function. It has four possible values, *(default)*, *Post*, *E-mail* and *Fax*, and allows the *Preferred Delivery Method* value specified against a particular name to be overridden on a role-by-role basis.

Whenever a document is generated and printed against a name in a particular role, the override value (if any) in the role's *Preferred Delivery Method* field applies, unless that value itself has been overridden.

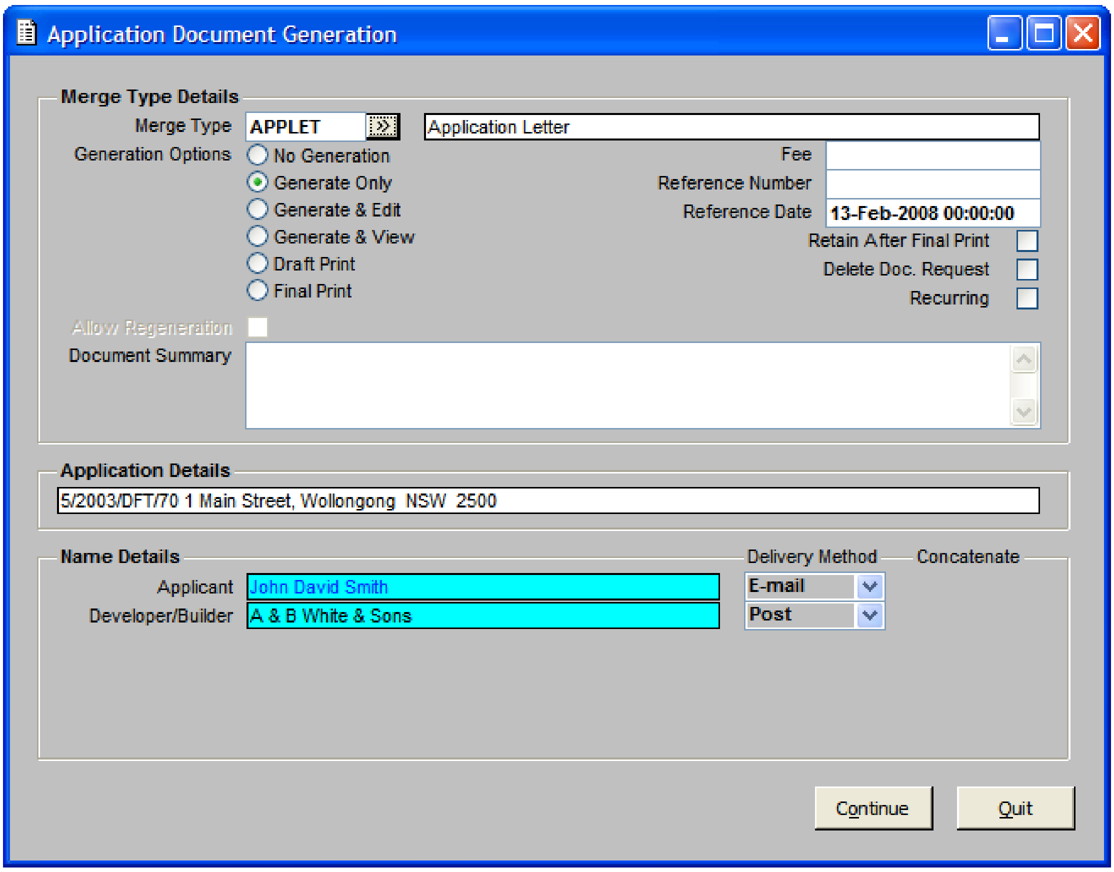
In the thick client, a white background for the field's text indicates an overridden value, while a gray background, as elsewhere in Pathway, indicates that a default value applies, in this case the value from the name record. Whenever *(default)* is selected from the drop-down, it is immediately replaced with the actual default (*Post*, *E-mail* or *Fax*) on a gray background. A warning message is displayed if *Fax* is the default or override value and no fax details have been specified in Mail & Fax Server Maintenance.

In the smart client, default *Preferred Delivery Method* values are denoted by a yellow "post it" icon, and override values by an "information" icon.



Application Mailing Name Maintenance form showing the new Preferred Delivery Method field with a default value of E-mail.

Document Generation



Application Document Generation form showing the new document-level Delivery Method field.

The Document Generation form, shown above, is accessible from a few different places within Pathway; for instance, via the *Send* button as selected from the Names Maintenance form within Application Maintenance.

A *Delivery Method* field has been made available against each listed name on the form when the site is authorised to the Electronic Document Delivery function. It has four possible values, *(default)*, *Post*, *E-mail* and *Fax*, and allows the *Preferred Delivery Method* value specified against a particular name or name role to be overridden on a document-by-document basis.

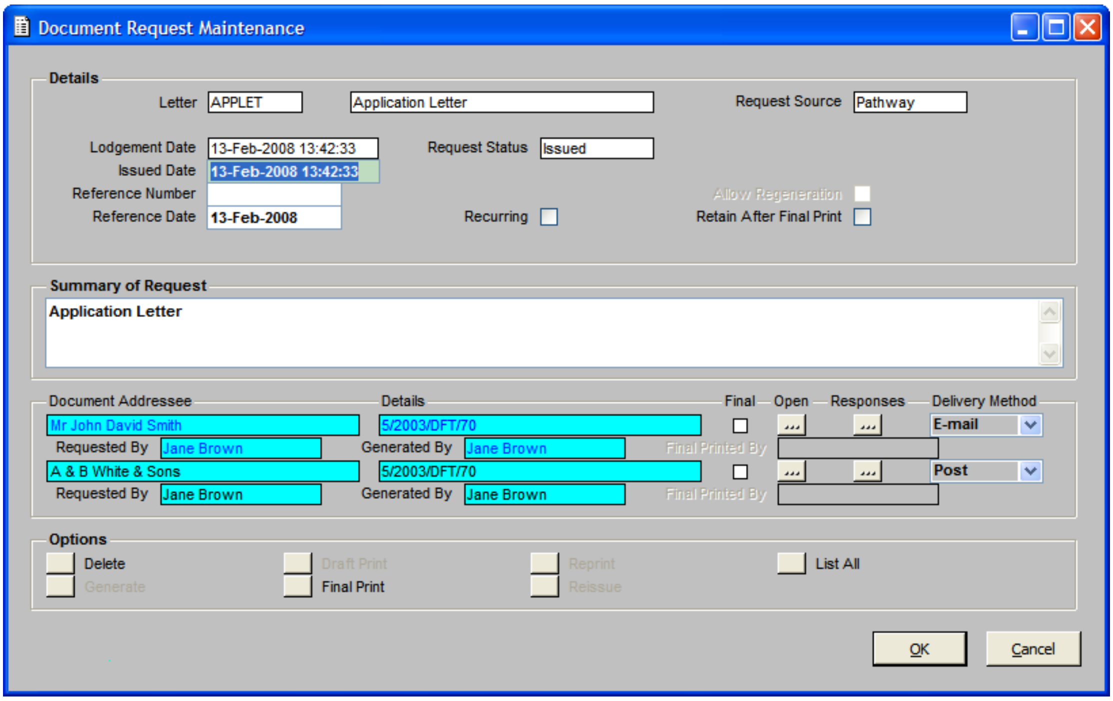
In the thick client, a white background for the field’s text indicates an overridden value, while a gray background indicates that the default value from the name or name role applies. Whenever *(default)* is selected from the drop-down, it is immediately replaced with the actual default (*Post*, *E-mail* or *Fax*) on a gray background. A warning message is displayed if *Fax* is the default or override value and no fax details have been specified in Mail & Fax Server Maintenance.

Where the Concatenate option is used, the *Delivery Method* field is only shown against the first name within the relevant role, and is not shown for the second and subsequent names.

In the smart client, default *Delivery Method* values are denoted by a yellow “post it” icon, and override values by an “information” icon.

<u>Request Selection</u>
The Request Selection form (often known as Letter Selection or Notice Selection) has been modified so that the Summary of Request field displays an indication of whether issued documents were sent by post or sent electronically.

<u>Document Request Maintenance</u>



Document Request Maintenance form showing the new document-level Delivery Method field.

Within the Document Request Maintenance form, which follows on from Request Selection, the *E-mail* checkbox has been replaced by a maintainable *Delivery Method* field, as appears within Application Document Generation. The *E-mail* checkbox previously appeared when a document request was associated with a Customer Profile application function such as *ePathway Certificate Request*. The *Delivery Method* drop-down field appears in the same circumstances, but also if the site is authorised to the Electronic Document Delivery function.

If the document request is associated with a Customer Profile application function, and the relevant addressee has a suitable Customer Profile, the options available in the drop-down field will be *(default)*, *E-*

mail and *Post* or *(default)*, *Web File* and *Post*, as appropriate. In essence, Pathway will function as it did previously, except that a checkbox is replaced with a drop-down field.

If the document request is *not* associated with a Customer Profile application function, but the site is authorised to Electronic Document Delivery, the options available in the drop-down field will be *(default)*, *E-mail*, *Fax* and *Post*.

In the thick client, a white background for the field's text indicates an overridden value, while a gray background indicates that the default value applies. Whenever *(default)* is selected from the drop-down, it is immediately replaced with the actual default on a gray background. For Customer Profile-related requests, this will be *E-mail* or *Web File* as appropriate. For other requests it will be the *Preferred Delivery Method* value from the relevant name or name role (*Post*, *E-mail* or *Fax*). A warning message is displayed if *Fax* is the default or override value and no fax details have been specified in Mail & Fax Server Maintenance.

In the smart client, default *Delivery Method* values are denoted by a yellow "post it" icon, and override values by an "information" icon.

As before, users can see details of e-mail messages used to deliver documents, illustrated later in a figure of the E-mail Message Enquiry form, by selecting the *E-mail History* option from the *Associated* drop-down menu.

Document Printing and Delivery

Delivery preferences for the Electronic Document Delivery function apply when a document is "final-printed". To determine the correct delivery method, the *Delivery Method* value against the document is first checked. If it is not an override value, the *Preferred Delivery Method* value against the relevant *name role* is checked. If it, in turn, is not an override value, the *Preferred Delivery Method* value against the relevant *name* is checked.

When sending fax messages, Pathway processes them as e-mails. In fact, it makes more sense to talk of fax recipients than fax messages. Fax recipients have e-mail addresses of the form *faxnumber@faxserver* (e.g. *+61812345678@fax.council.com*), where the local part of each address (before the "@" sign) is the fax number to use, as retrieved from the communication details of the relevant name record, and the domain part (after the "@" sign) is constructed from the fax server host name and port number specified in Mail & Fax Server Maintenance. Fax numbers are stripped of spaces and round brackets, which could be problematic within the local part of an SMTP mailing address.

When sending documents electronically, if there is more than one communication detail of the relevant e-mail or fax type, the message is sent to the first sequenced address or number. If there is more than one addressee against a document, such as when names are concatenated on the Application Document Generation form, e-mail and fax messages are only sent to the first sequenced addressee, as with printed documents.

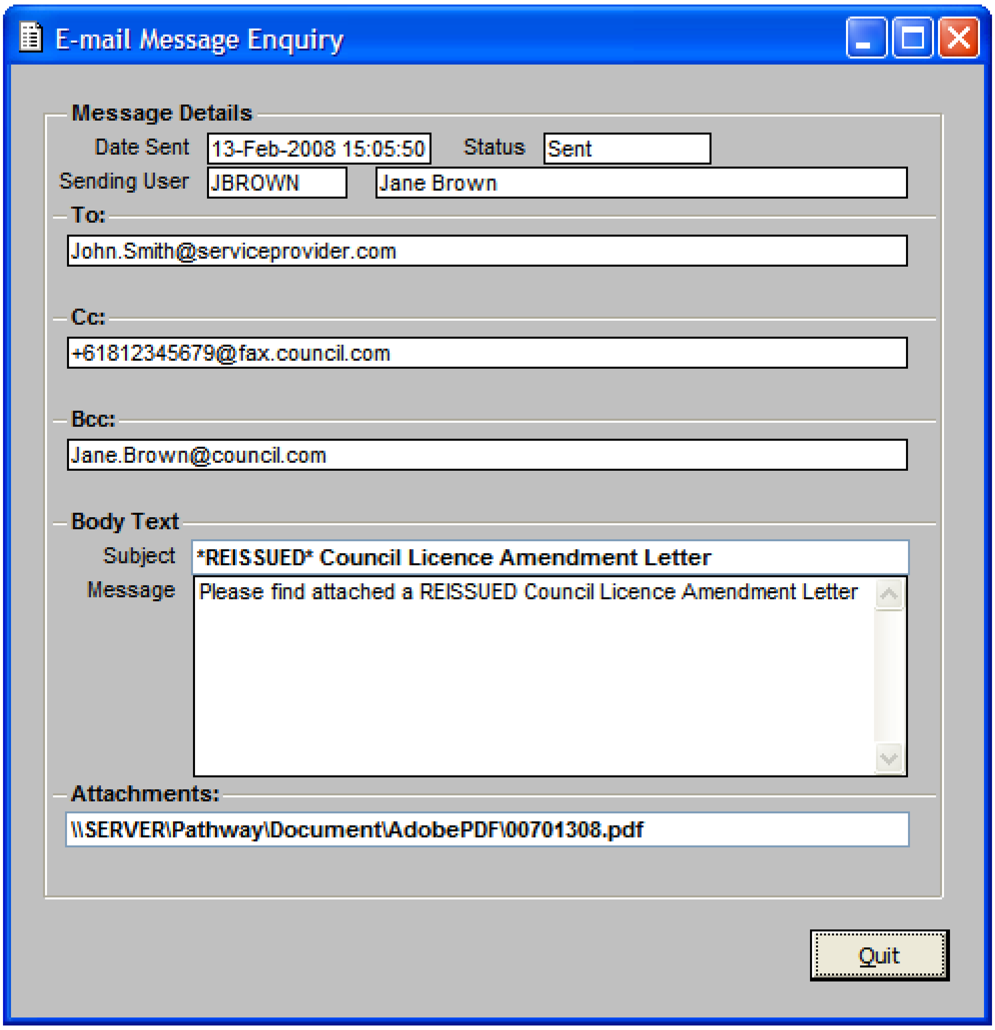
Where no e-mail address or fax number is found for the relevant communication type, an error message to this effect is displayed in the message area at the bottom of the screen. A message's subject line is derived from the relevant document request summary (*Document Summary* on the Application Document Generation form and *Summary of Request* on the Document Request Maintenance form). The message body is composed of the standard text "Please find attached a", followed by the relevant document request summary. An example of a generated e-mail message is shown below.

Example of generated e-mail message with PDF attachment.

As with the pre-existing e-mail delivery functionality, bounce-back e-mails will appear in the inbox of the e-mail client running on the PDF background job queue's workstation. This may need to be checked periodically in order to best manage e-mail address data. Handling of incorrect fax numbers will depend to a large degree on the fax server software employed.

E-mail Message Enquiry

Because fax messages are processed as e-mails, it is possible to view their details within the existing E-mail Message Enquiry function that is accessible from, among other places, the *E-mail History* option on the *Associated* drop-down menu in Document Request Maintenance. There have not been any special accommodations made to differentiate fax recipients from regular e-mail recipients because, in most cases, fax recipients are obvious by the format of their addresses, as shown in the figure below.



E-mail History details displayed via the Associated drop-down menu item in Document Request Maintenance, showing both fax and e-mail recipients.

Note: If Bcc (Blind Copy) is used in emailing, it will function as follows: When a Document is Final Printed, one email is sent to the customer with the PDF in Final Format. In addition, one email is sent as a Bcc to the Generating User with the PDF in Final Format.

Document Batch Processing

The *E-mail* checkbox on the Document Batch Processing Control form has been replaced with a *Delivery Method* drop-down control, which is likewise enabled when the *Draft Print* or *Final Print* options are chosen. The new drop-down appears regardless of whether the Electronic Document Delivery authorised function is enabled, as it also applies to document requests related to Customer Profile application functions such as Pathway Licence Renewals. The possible values are *(default)* and *Post*. If *(default)* is chosen, the preferred delivery method for each addressee, or the one explicitly set against the document, will be used. If *Post* is chosen, a physical copy of all documents will be printed, regardless of addressee preferences.

Infringements Letter Maintenance

There is currently no override *Delivery Method* field available on this form; however, it is intended that one should be provided in a later release.

Note: This Electronic Document Delivery function will be available only to sites that have the required authority. Contact your account manager if your site requires this new functionality.

SETUP INSTRUCTIONS FOR ELECTRONIC DOCUMENT DELIVERY

These instructions outline the setting up of Pathway to make use of the *Electronic Document Delivery* authorised function. They assume that an access code for the function has been obtained and entered within System Administration >> System Parameters >> System Parameter Maintenance.

For more information about individual features of the function, please refer to the Enhancements and New Functionality document.

- The e-mail delivery feature uses the third party software and parameter settings associated with the existing Customer Profile application function e-mail delivery feature. The main third party software product required is Adobe Acrobat 5 or later, and in particular the Distiller component. Please refer to the help text against the Word Processing >> Word Processing Parameters >> PDF Document Conversion Parameters option for more information.

- The fax delivery feature of the function requires third party software or an internet service that can receive SMTP e-mail messages, convert them, and transmit them as faxes. Examples are *MESSAGEmanager FAX* and *eFax*®. If necessary, this software or service should be configured to receive e-mail messages from relevant people within the organisation, where the messages have addresses of the form *faxnumber@faxserver*, e.g. *+61812345678@efax.com*.

- If making use of the fax delivery feature, fax communication types should be specified within System Administration >> Customer Profile Parameters >> System Parameters.

- Fax server details should be specified within System Administration >> System Parameters >> Mail and Fax Server Maintenance if necessary.

  Note: This menu option is only accessible from the Pathway smart client.

Pathway will now be suitably configured to allow the entry of values in the *Preferred Delivery Method* fields within Name Maintenance and Application Mailing Name Maintenance, as they become known.

A: ELECTRONIC DOCUMENT DELIVERY - AUTHORITY CODE ON

CWPG1500 – <Module> Document Generation

MODULES: LAP (Application Document Generation), ABK (Booking Document Generation),
LIN (Inspection Document Generation), CRG (Register document Generation), LLC (Licensing Document Generation)

A	Draft ON				Draft OFF				
	Email	**Fax**	**(default)**	**Post**	**Email**	**Fax**	**(default)**	**Post**	
Draft print	1.Email + PDF to generator 2.Watermark	1.Email + PDF to generator 2.Watermark	1. Set to recipient's default Delivery method	1. Hard copy is printed 2. Watermark	1. Email + PDF to generator 2. No Watermark	1. Email + PDF to generator 2. No Watermark	1. Set to recipient's default Delivery method	1. Hard copy is printed 2. No watermark	
Final Print	1. Email + PDF to recipient 2. No watermark 3. Final Print flag checked ON	1. Fax (PDF) to recipient 2. No Watermark 3. Final Print Flag checked ON	1. Set to Recipient's default Delivery method	1. Hard copy is printed. 2. No watermark 3. Final Print flag checked ON	1. Email + PDF to recipient 2. No Watermark 3. Final Print checked ON	1. Fax (PDF) to recipient 2. No watermark 3. Final Print checked ON	1. Set to recipient's default Delivery method	1. Hard copy is printed 2. No watermark 3. Final Print checked ON	

B: DOCUMENT FINALISATION WITHOUT PRINTING - AUTHORITY CODE ON

CWPG1500 - <Module> Document Generation

MODULES: LAP (Application Document Generation), ABK (Booking Document Generation),
LIN (Inspection Document Generation), CRG (Register document Generation), LLC (Licensing Document Generation)

B	Draft ON				Draft OFF				
	Email	**Fax**	**None**	**Post**	**Email**	**Fax**	**None**	**Post**	
Draft print	X	X	1. Hard Copy is printed 2. Watermark	1. Hard Copy is printed 2. watermark	X	X	1. No Delivery Method options 2. Hard Copy is printed 3. No Watermark		
Final Print	X	X	1. Nothing is printed 3. Final Print flag checked ON	1. Hard Copy is printed 2. No watermark 3. Final Print Flag checked ON	X	X	X	X	
Finalise	X	X	X	X	X	X	1. No Delivery Method options 2. No Hard Copy is printed 3. Final Print Flag checked ON		

C: ELECTRONIC DOCUMENT DELIVERY & DOCUMENT FINALISATION WITHOUT PRINTING - AUTHORITY CODE ON

CWPG1500 - <Module> Document Generation

MODULES: LAP (Application Document Generation), ABK (Booking Document Generation),
LIN (Inspection Document Generation), CRG (Register document Generation), LLC (Licensing Document Generation)

C	Draft ON				Draft OFF				
	Email	**Fax**	**None**	**Post**	**Email**	**Fax**	**None**	**Post**	
Draft print	1.Email + PDF to generator 2. Watermark	1.Email + PDF to generator 2. Watermark	1. Hard Copy is printed 2. Watermark	1. Hard Copy is printed 2. Watermark	1. Email + PDF to generator 2. No watermark	1. Email + PDF to generator 2. No watermark	1. Hard Copy is printed 2. No watermark	X	
Final Print	1. Email + PDF to Recipient 2. No Watermark 3. Final Print flag checked ON	1. Fax (PDF) to recipient 2. No Watermark 3. Final Print flag checked ON	1. Nothing printed. 2. Final Print Flag checked ON	1. Hard Copy is printed 2. No Watermark 3. Final Print Flag checked ON	X	X	X	X	
Finalise	X	X	X	X	1. Email + PDF to Recipient 2. No Watermark 3. Final Print Flag checked ON	1. Fax (PDF) to recipient 2. No watermark 3. Final Print flag checked ON	1. Nothing Printed 2. Final Print Flag checked ON	X	

D: ELECTRONIC DOCUMENT DELIVERY - AUTHORITY CODE ON

CWPG1200 – Document Request Maintenance Form

MODULES: LAP, ABK, LIN, CRG, LLC, LAN, LDR, LPA, LRA, LWB, ACR

D	Draft ON				Draft OFF				
	Email	**Fax**	**(default)**	**Post**	**Email**	**Fax**	**(default)**	**Post**	
Draft print	1. Email + PDF to generator 2. Watermark	1. Email + PDF to generator 2. Watermark	1. Set to Recipient's default Document Delivery method	1. Hard Copy printed 2. Watermark	1. Email + PDF to generator 2. No watermark	1. Email + PDF to generator 2. No watermark	1. Set to Recipient's default DD method	1. Hard Copy is printed 2. No watermark	
Final Print	1. Email + PDF to recipient 2. No Watermark 3. Final Print flag ON	1. Fax (PDF) to recipient 2. No watermark 3. Final Print flag ON	1. Set to Recipient's default DD method	1. Hard copy printed 2. No Watermark 3. Final Print flag ON	1. Email + PDF to recipient 2. No Watermark 3. Final Print flag ON	1. Fax (PDF) to recipient 2. No watermark 3. Final Print Flag is ON	1. Set to Recipient's default DD method	1. Hard Copy is printed 2. No watermark 3. Final Print Flag is ON	
Finalise	X	X	X	X	X	X	X	X	
Reprint – (Always prints a hard copy)	1. Hard Copy printed 2. No Watermark	1. Hard Copy printed 2. No watermark	1. Set to Recipient's default DD method	1. Hard Copy printed 2. No watermark	1. Hard Copy printed 2. No Watermark	1. Hard Copy printed 2. No Watermark	1. Set to Recipient's default DD method	1. Hard Copy printed 2. No Watermark	
Reissue – (governed by addressee Delivery Method)	1. Email + PDF to recipient 2. No Watermark	1. Fax (PDF) to recipient 2. No watermark	1.Set to Recipient's default DD method	1. Hard copy printed 2. No watermark	1. Email + PDF to recipient 2. No Watermark	1. Fax (PDF) to recipient 2. No watermark	1. Set to Recipient's default DD method	1. Hard copy printed 2. No watermark	

E: DOCUMENT FINALISATION WITHOUT PRINTING - AUTHORITY CODE ON

CWPG1200 – Document Request Maintenance Form

MODULES: LAP, ABK, LIN, CRG, LLC, LAN, LDR, LPA, LRA, LWB, ACR

E	Draft ON				Draft OFF				
	Email	Fax	None	Post	Email	Fax	None	Post	
Draft print	X	X	1. Hard Copy printed 2. Watermark	1. Hard Copy printed 2. Watermark	X	X	1. No Document Delivery options 2. Hard Copy printed 3. Watermark		
Final Print	X	X	1. Nothing printed 2. Final Print flag ON	1. Hard Copy printed 2. No watermark 3. Final Print flag ON	X	X	X	X	
Finalise	X	X	X	X	X	X	1. No Document delivery options 2. Nothing printed 3. Final Print Flag ON		
Reprint – (Always prints a hard copy)	X	X	1. Hard Copy printed 2. No watermark	1. Hard Copy printed 2. No watermark	X	X	1. No Document Delivery options 2. Hard Copy printed 3. No watermark		
Reissue – (governed by addressee Delivery Method)	X	X	1. Nothing printed (Document is regenerated only)	1. Hard Copy printed 2. No watermark	X	X	1. No Document Delivery options 2. Hard Copy printed 3. No watermark		

F: ELECTRONIC DOCUMENT DELIVERY & DOCUMENT FINALISATION WITHOUT PRINTING - AUTHORITY CODE ON

CWPG1200 – Document Request Maintenance Form

MODULES: LAP, ABK, LIN, CRG, LLC, LAN, LDR, LPA, LRA, LWB, ACR

F	**Draft ON**				**Draft OFF**				
	Email	**Fax**	**None**	**Post**	**Email**	**Fax**	**None**	**Post**	
Draft print	1. Email + PDF to generator 2. Watermark	1. Email + PDF to generator 2. Watermark	1. Hard copy printed 2. Watermark	1. Hard copy printed 2. Watermark	1. Email + PDF to generator 2. No Watermark	1. Email + PDF to generator 2. No Watermark	1. Hard copy printed 2. No Watermark	X	
Final Print	1. Email + PDF to Recipient 2. No watermark 3. Final Print flag ON	1. Fax (PDF) to recipient 2. No Watermark 3. Final Print flag ON	1. Nothing printed 2. Final Print flag ON	1. Hard copy printed 2. No Watermark 3. Final Print flag ON	X	X	X	X	
Finalise	X	X	X	X	1. Email + PDF to recipient 2. No watermark 3. Final Print flag ON	1. Fax (PDF) to recipient 2. No watermark 3. Final Print flag ON	1. Nothing printed 2. Final Print flag ON	X	
Reprint – (Always prints a hard copy)	1. Hard copy printed 2. No Watermark	1. Hard copy printed 2. No Watermark	1. Hard copy printed 2. No Watermark	1. Hard copy printed 2. No Watermark	1. Hard copy printed 2. No Watermark	1. Hard Copy printed 2. No Watermark	1. Hard Copy printed 2. No watermark	X	
Reissue – (governed by addressee Delivery Method)	1. Email+PDF to Recipient 2. No watermark	1. Fax (PDF) to recipient 2. No watermark	1. Nothing printed (Document is regenrated only)	1. Hard copy printed 2. No Watermark	1. Email + PDF to recipient 2. No watermark	1. Fax (PDF) to recipient 2. No Watermark	1. Nothing is printed (Document is regenerated only)	X	

Document Batch Processing

The Batch Document Print facility is used by many Pathway modules to perform Batch Generation and Printing of document requests.

The letter request must already exist on the source module records, it does not need to have been generated just created.

The purpose behind the batch print function is that you create the letter requests during the day and then run the whole lot in one hit at the end of the day.

Some of the features provided by the Batch Document Control form are as follows:

- Allows Editing indicator - A flag showing if the Merge Type supports editing of documents. 'Draft' printing may only be performed for documents where the Merge Type allows editing.

- Data File Name - The Batch Document function provides for the output of the Merge Type data fields to a 'CSV' output file. If this is required, specify a file name here to have the processing generate a file. This feature supports the output of the data fields defined on the Merge Type. It does not support the inclusion of embedded Extract Type data. The extract file will be produced for any of the Generation Options whenever a Data File Name has been entered. When using the 'Generate Only', 'Draft Print', 'Final Print' or 'Reprint' options the details output will be for those document links that matched the selection criteria and were valid for Generation and/or Printing. If the 'Extract Data Only' option is used however, then the data will be extracted for all document links that met the selection criteria, regardless of their Generated or Printed status.

- Generation Options – The generation options for this batch process include the 'Generate Only', 'Draft Print' and 'Final Print' options, along with the special functions of 'Extract Data Only' and 'Reprint'. Note that the 'Generate Only' option will generate those documents that do not exist, and will regenerate any existing document where the associated Request allows regeneration. The 'Draft Print' and 'Final Print' options on the other hand will only generate documents that do not exist. The print options will not regenerate any existing documents. Documents will not be printed if they have already been 'Final' printed, unless the 'Reprint' option is chosen, in which case documents will only be printed when they have been 'Final' printed.

- Recurring Request Processing Option – This special option allows for the generation and printing of 'Recurring' Requests. The processing of Recurring Requests has been enhanced, see further details below.

- Recurring Requests selection option – This selection item allows you to specify if 'Recurring', 'Non-Recurring', or 'Both' are to be included in the selection. Note that if the Recurring Request Processing Option has been checked on, this selection item is forced to be 'Recurring'. See below for details of the new Recurring Request process.

Note that when selecting Merge Types for processing it is necessary to click on the Merge Type Code or Description. Multi-Selection is allowed. However, if you click on the Data File Name field, focus will shift to that field, allowing you to specify a File Name, without affecting the selected Merge Types. This behaviour is intentional.

Users of the Dataworks Document Management system should note that the Précis value of printed documents will now be updated to reflect the type of print that was performed. I.e.: the Précis could be prefixed with "Draft Print:" or "Final Print", as the case may be. Also, once documents have been 'Final' printed, Dataworks will now treat the documents as 'Locked' or 'Frozen' and they will no longer be able to be altered via the Dataworks Document Management interface.

Recurring Request processing - This function has been significantly enhanced. Previously, when Recurring Requests were processed, the previous documents were overwritten as the function regenerated all the documents for the selected Recurring Requests. The existing Requests were updated to reflect the new Issue Date etc. As at Release 2.14 of the software Recurring Requests will no longer be overwritten. Instead, the selected Recurring Requests will be copied with new Requests being created and new documents being generated for them. The original Requests will be updated as being Non-Recurring, and the newly created Requests will be written as Recurring Requests to replace them. In this way the details of previously processed Recurring Notices etc will be retained.

NOTE: For Recurring Requests to be eligible for processing the Document Links associated with the Request must have been finalised (i.e.: 'Final' Printed).

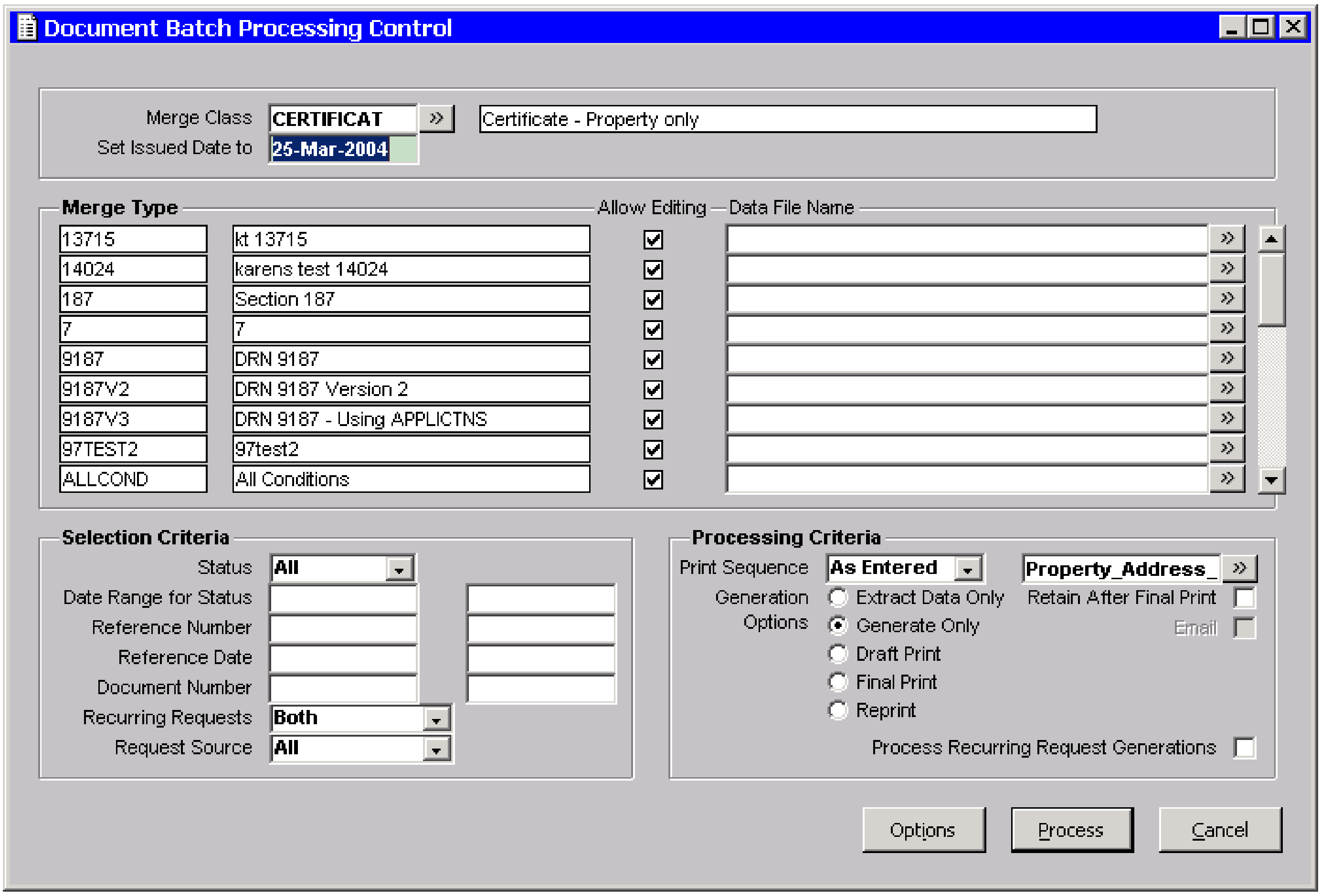
Document Batch Processing Control Form

This form enables the Batch Printing of previously generated or entered word processing documents. Filtering of the documents printed can be based on the following factors:

- Merge Type - i.e. the actual document (e.g. Section 149 Certificate, Fire Hazard Notice)
- Status of document request (Issued, New, Expired, Completed, All)
- Recurring Notices

The Batch Printing function enables a generation process to occur as well as a printing process, if required. The Required printing sequence of all documents produced via this option may be selected.

Merge Type Security may determine which Merge Types are displayed on this form. After selecting the Merge Class, the list of Merge Types displayed for selection will be conditioned on those Merge Types assigned to the User accessing the form. As such, any User who has access to these menu options will only be able to Generate or Generate/Print or Print Documents that are linked to Merge Types that they have Create/Change rights to.



Document Batch Processing Control Form

Merge Class

This field enables you to select the class of the documents to be selected. Classes which may be printed via Batch Printing include Certificates, Letters and Miscellaneous Notices. Enter the required Merge Class or select from the pop-up..

Set Issued Date To

This field should contain the date that you wish to log as the Issued Date against all documents that are printed in a Batch run. This date will initially default to the Current System Date but may be modified if required. Using a double click or F2 on the field will initiate the Date Pop Up which enables the required date to be selected.

Merge Type

This field contains a list of all merge types which match the selected Merge Class. The Merge Type field is in multiple selection mode. This enables you to select one or many Merge Types for printing in Batch. The Merge Type can be used in conjunction with the other criteria to determine the documents which will be printed.

Note: When selecting Merge Types for processing it is necessary to click on the Merge Type Code or Description. Multi-Selection is allowed. However, if you click on the Data File Name field, focus will shift to that field, allowing you to specify a File Name, without affecting the selected Merge Types. This behaviour is intentional.

Allows Editing Indicator

This flag indicates whether the Merge Type supports editing of documents. ‘Draft’ printing may only be performed for documents where the Merge Type allows editing.
(In Receipt printing this field is shown even though no ‘RECEIPT’ Merge Type allows editing)

Data File Name

The Batch Document function provides for the output of the Merge Type data fields to a ‘CSV’ output file. If this is required, the user needs to specify a file name here to have the processing generate a file. This feature supports the output of the data fields defined on the Merge Type. It does not support the inclusion of embedded Extract Type data. The extract file will be produced for any of the Generation Options whenever a Data File Name has been entered. When using the ‘Generate Only’, ‘Draft Print’ or ‘Final Print’ options the details which are output will be for those document links that match the selection criteria and are valid for Generation and/or Printing. If the ‘Extract Data Only’ option is used however, then the data will be extracted for all document links that meet the selection criteria, regardless of their Generated or Printed status.

Note: When selecting Merge Types for processing it is necessary to click on the Merge Type Code or Description. Multi-Selection is allowed. However, if you click on the Data File Name field, focus will shift to that field, allowing you to specify a File Name, without affecting the selected Merge Types. This behaviour is intentional.

Status

This field enables the selection of a particular document status. The following options are available from the drop-down list.

Note: For batch printing of Receipts, only the ‘New’ Status can be used. Other available Statuses (Completed, Issued) do not apply for Receipt printing.

Status – Completed

If Status is Completed then the dates entered in the Date Range for Status will be based on the date contained within the “Completion Date” field on documents.

For example, if the date range of 1/11/1999 to 30/11/1999 is entered then the process will only select those documents where the Completion Date is greater than or equal to 1/11/1999 and less than or equal to 30/11/1999.

If you do not enter a date range then all documents that contain a date within the Completion Date field will be selected.

If there is no completion date on a document then it will not be considered.

Status – Issued

If Status is Issued then the dates entered in the Date Range for Status will be based on the date contained within the "Issued Date" field on documents.

For example, if the date range of 1/11/1999 to 30/11/1999 is entered then the process will only select those documents where the Issued Date is greater than or equal to 1/11/1999 and less than or equal to 30/11/1999.

If you do not enter a date range then all documents that contain a date within the Issued Date field will be selected.

If there is no Issued Date on a document then it will not be considered as there is then an "implied" status of "New".

If there is a Completed Date or an Expiry Date that is less than today's date the document will not be considered as there is then an "implied" status of Completed or Expired.

If there is a Completed Date or an Expiry Date that is greater than or equal to today's date then that document will be considered in the process as it has not yet passed its completion or expiry date.

Status – New

This Status is the one generally used when using the Batch Print function.

If Status is New then the dates entered in the Date Range for Status will be based on the date contained within the "Lodgement Date" field on documents. The Issued Date on the documents must be blank.

For example, if the date range of 1/11/1999 to 30/11/1999 is entered then the process will only select those documents where the Lodgement Date is greater than or equal to 1/11/1999 and less than or equal to 30/11/1999 and the Issued Date is blank.

If you do not enter a date range then all documents that do NOT contain a date within the Issued Date field will be selected.

If there is an Issued Date, Completed Date or an Expiry Date on the document then it will not be considered as there is then an "implied" status of Issued, Completed or Expired.

Date Range for Status

This field enables a start and end date range to be nominated. This date range will apply to the status field (where applicable).

If a Status Date Range is entered, then only those documents whose Status Date falls within that range will be selected.

If no Status Date is entered, then ALL documents containing a date in that particular field will be selected. If there is no Date in that particular Status field on the document, then the document will not be selected.

Please refer to Help on the Status field for a more detailed example.

Reference Number Range

This field enables a range of reference numbers to be nominated. This will enable a certain group of documents to be printed, or an individual document if required. The Reference number is an optional field which may be entered during the Document Request Maintenance process.

Reference Date Range

This field enables a start and end date reference date range to be nominated. The Reference Date is an optional field which may be entered during the Document Request Maintenance process.

Document Number Range

This field enables a range of document numbers to be nominated. This will enable a certain group of documents to be printed. The Document number is defined by the system (during document generation), based on the Numbering Scheme allocated to a particular Document Request.

Recurring Requests
This field enables you to nominate whether recurring notices are to be included in the Batch Printing run. The following options are available from the drop-down list

- Both
- Recurring
- Non Recurring

Note: If the Recurring Request Processing Option has been checked on, this selection item is forced to be 'Recurring'. Refer to section on Recurring Request Processing for further details.(127)

Note: This field is not available for Receipt printing.

Print Sequence
These fields enable you to determine the order that printed documents will be printed. There are two options available from the drop-down list

- As Entered
- By Field >

If the 'By Field' option is selected, the popup button may be utilised to select from the predefined list of fields, the field by which you wish sequencing to occur.
For example, you may wish to sequence by an Issue or Reference date, or in a property house number sequence.

Generation Options
The generation options for this batch process include the 'Generate Only', 'Draft Print' and 'Final Print' options, along with a special function of 'Extract Data Only'.

- 'Extract Data Only' – In order to use this option, each Merge Type must have a Data File Name specified. All documents (Final Printed or otherwise) will have their data fields, as described on the Merge Type, extracted to the named .CSV file. No document generation or printing will take place. The special 'Recurring' processing option is not available for the Data Extract option.
  Note: This option is not available for Receipt Processing.

- 'Generate Only' – This option will generate those documents that do not exist, and will regenerate any existing document where the associated Request allows regeneration. If a Data File Name is specified against the selected Merge Type then a .CSV extract file will also be created from the data for each document processed.
  Note: This option is not available for Receipt Processing.

- 'Draft Print' and 'Final Print' options on the other hand will only generate documents that do not exist. The print options will not regenerate any existing documents. Documents will not be printed if they have already been 'Final' printed, unless the 'Reprint' option is chosen, in which case documents will only be printed when they have been 'Final' printed. However, only the 'Final Print' and 'Reprint' options are valid for use by Receipting. For the Receipting module, all Receipts are printed as 'Final' and the 'Draft' features are not available. For Receipts to be available for printing by this process they must have been created via the 'Print' or 'Batch Print' options in Receipt Entry. Receipts may only be reprinted once they have been 'Final' printed.. If a Data File Name is specified against the selected Merge Type then a .CSV extract file will also be created from the data for each document processed.

Note: Users of the Dataworks Document Management system should note that the Précis value of printed documents will now be updated to reflect the type of print that was performed. I.e.: the Précis could be prefixed with "Draft Print:" or "Final Print", as the case may be. Also, once documents have been 'Final' printed, Dataworks will now treat the documents as 'Locked' or 'Frozen' and they will no longer be able to be altered via the Dataworks Document Management interface.

Retain After Printing
If this checkbox is checked on, all printed documents will be retained to enable editing and reprinting without requiring a re-generation. The documents will be stored in the directory structure nominated via the Word Processing parameters (Refer to the Word Processing User Guide for further information regarding document storage). This flag will override the 'Retain After Printing' flag settings in the Document Request Maintenance and the Merge Type Maintenance forms.

Note: This flag does not apply to Receipt printing, as all Receipts must be regenerated before printing.

Email
The Email button becomes available when the 'Draft Print' or 'Final Print' options are selected. It is used with 'e-newable Licences' and 'ePathway', allowing the final or draft document to be converted to PDF format and emailed to the person nominated as long as the person has a Customer profile set up (with email address). This function requires that Adobe Acrobat Distiller be installed and the ePathway/e-newable Licence parameters set up.

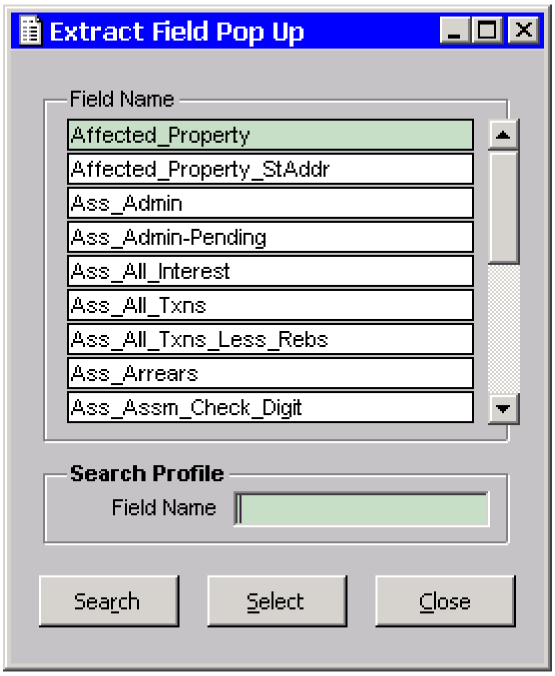
Process Recurring Request Generations
This special option allows for the generation and printing of 'Recurring' Requests.
The processing of Recurring Requests has been enhanced. Previously, when Recurring Requests were processed, the previous documents were overwritten as the function regenerated all the documents for the selected Recurring Requests. The existing Requests were updated to reflect the new Issue Date etc. As of Release 2.14 Recurring Requests will no longer be overwritten. Instead, the selected Recurring Requests will be copied with new Requests being created and new documents being generated for them. The original Requests will be updated as being Non-Recurring, and the newly created Requests will be written as Recurring Requests to replace them. In this way the details of previously processed Recurring Notices etc will be retained.

NOTE: For Recurring Requests to be eligible for processing the Document Links associated with the Request must have been finalised (i.e.: 'Final' Printed)

Note: This flag does not apply to Receipt printing.

Extract Field Pop Up Form

This form enables a particular extract field to be selected to determine the printing sequence of notices via the Batch Processing function. It is also used by the Merge Type Search Profile form to specify an Extract Field on which to base a search.



Extract Field Pop Up Form

Field Name
This field contains a list of all extract fields which are available

- to determine the printing sequence of word documents

or

- to base a search on

Search Profile - Field Name
Enter a field name (or part thereof) on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

Name and Address Labels

This section provides some suggested steps for creating a standard template for printing Name and Address Labels. (via Word97)

The following topic is covered in this section:

Creating Name and Address Labels

The following section provides some suggested steps for creating a standard template for printing Name and Address Labels. (via Word 6.0)
This standard label template will have the following attributes

Type	Custom Laser
Height	3.81
Width	6.35
Page Size	A4 (21cm X 29.7 cm)
Down	7 labels down
Across	2 labels across
Paper Feed	Manual

The Name and Address Labels template is created via the Merge Type Maintenance parameter within Name and Address Parameters.

- Create the Merge Type details for Labels and select the Edit Document button to create the Word Document
- Insert the required merge fields (Name and Address) in the first label position on the template (you may need to insert a carriage return before the first merge field to position it away from the edge of the page)
- Position the cursor to the paragraph marking after the Next Record insert the same merge fields in the second label position
- Use the copy and paste facilities within word to copy these merge fields (including the Next Record insert), to each of the label positions. (You may need to adjust the positioning of these fields on each label.)
- Return to Pathway and save the changes to the template

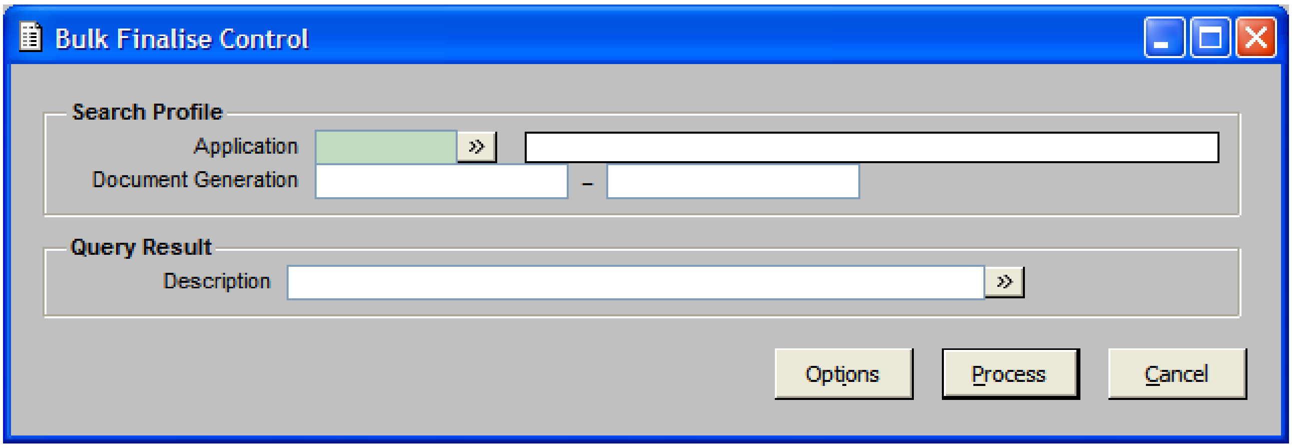
Name and Address Labels are printed via the Name and Address Maintenance option, using the Document button. The Paper Feed has been set to Manual Feed to enable label paper to be fed into the printer. Standard letters may also be created and printed via Name and Address.

Batch Functions

Bulk Document Finalisation

A new batch process has been created which sets existing documents to Finalised. This part of the Auythorised function “Document finalisation without Printing”

The Menu option is located in ‘System Menu >> Word Processing >> Batch Functions’.



Bulk Finalise Control form used for setting documents to be finalised.

Application – This pop-up selection field will present the user with a list of modules. Left Blank the process will consider ALL modules.

Document Date – The Document Generation Date Range will allow for a date range to be entered for processing consideration. Where left Blank, ALL records will be considered for updating. Document processing will be performed in reverse order i.e. the most recent documents will be processed first.

Query result – Allows for standard Pathway query function to identify selected records for update. The query is available over the CWPLINK entity. Where a query result is selected, all other fields will be unavailable.

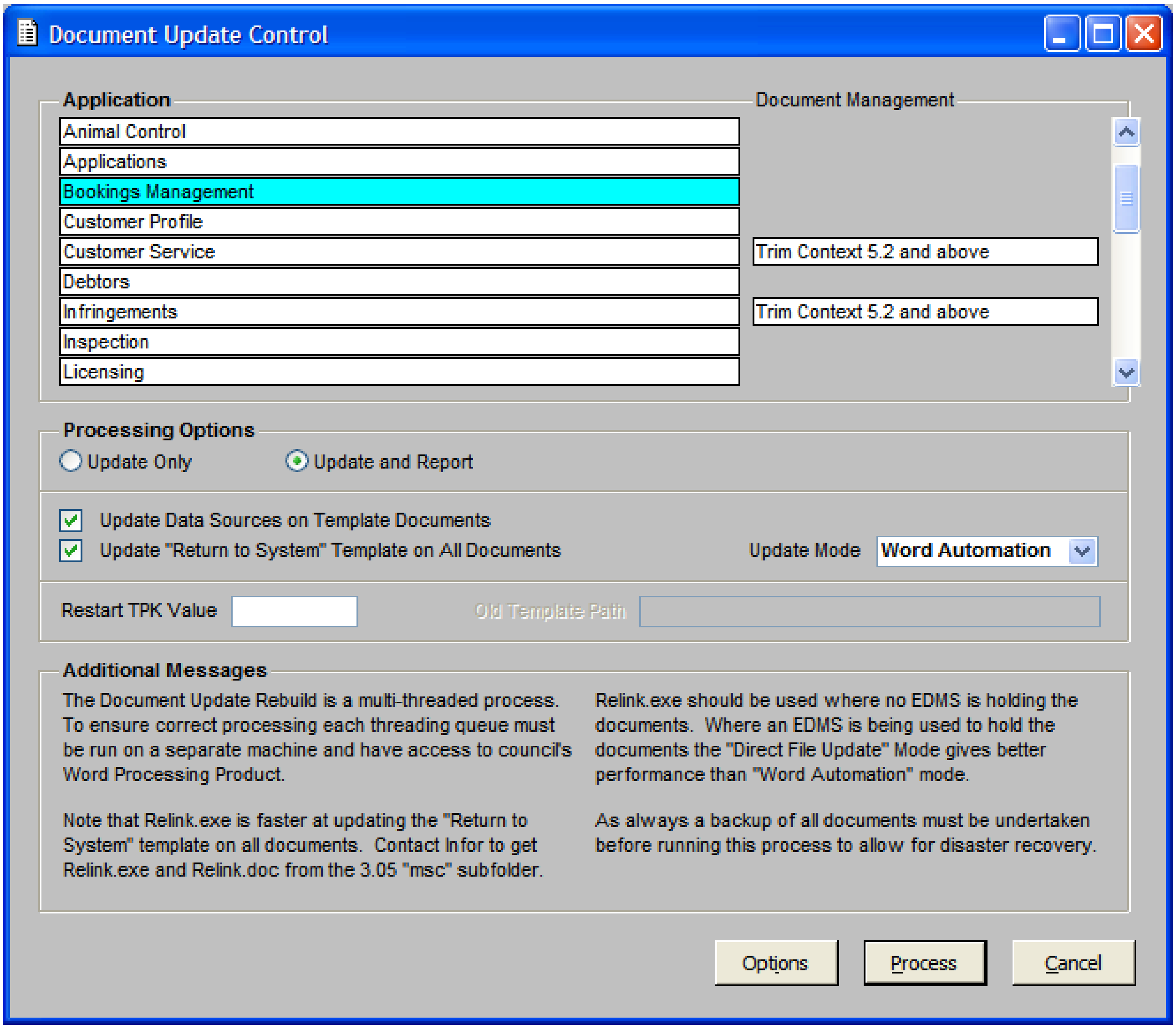
The process supports multi-threading.

Document Update Control

When moving documents from one location or server to another the templates and mail merge data sources that are attached to documents are lost. This is because Word stores the attachment of those templates and documents using the Universal Name Convention as opposed to a drive mapping.

In order to make the movement of documents simpler, the following program can be used.

Document Update Control Form



Document Update Control Form

The program allows the User to specify which Applications are to be processed and has two processing options:
(a) Update data sources on Template Documents
(b) Update "Return To System" Template on all documents

MULTI-THREADING

The Document Update control process has been enhanced to be a multi-threaded process. In order to run this however you must have each thread on a separate PC. This is due to the need to have a separate Word session for each thread.

The Re-start TPK field has been introduced so that in the event of the process failing or being stopped, you may re-start from the last record processed rather than being forced to re-process the entire job. In this instance, you will need to view the log file for the pathway session in order to obtain the last tpk value. A message similar to the following will appear:

'Processing Failed at TPK 551641. Please use this as the Restart TPK and resubmit the job.'

This tpk(tpkcwppdoc) will be the document that the process failed on. Council will need to determine why this failed, and if possible correct the problem and re-start, or alternatively, depending on the outcome of investigations, start at the next tpk.

The following steps will need to be performed before running Document Update Control to update the data source on template documents.

(a) Update data sources on Template Documents
1) The new server is put on the network and all the documents are copied from one server to the other. Note that the documents will also need to remain in the original location.
2) If the old location is an FTP site and the new location is a non FTP site, in addition, all the old documents need to be copied to the old working directory (e.g.: C:\temp).
3) Go to Word Processing Parameters / Product Application Maintenance to update External Application Document location to the new location
4) If a document is not a Template document but is a Mail Merge document (possibly a user defined, non-standard Pathway Document), the data source re-attaching has to be done manually by the User before this program is executed.

The following steps need to be performed before running Document Update Control to update the "Return To System" Template on all documents.
Please note if you are running this option combined with option (a), do not perform Step 1 to Step 4 as this has been done by option (a) already.

(b) Update "Return To System" Template on all documents
1) The new server is put on the network and all the documents are copied from one server to the other. Note that the documents will also need to remain in the original location.
2) If the old location is an FTP site and new location is a non FTP site, in addition, all the old documents need to be copied to the old working directory (e.g.: C:\temp).
3) Go to Word Processing Parameters / Product Application Maintenance to update the External Application Document location to the new location
4) If a document is not a Template document but is a Mail Merge document (possibly a user defined, non-standard Pathway Document), the data source re-attaching has to be done manually by the User before this program is executed.
5) Copy "Return to System" templates from their original template directory to the new location
6) Go to Word Processing Parameters / Maintain Word Processing Details to update the template directory to its new location.

Processing Details:
The following problem may happen while processing documents and the data source is being updated on Merge Types or Extract Types:

When the conversion program is trying to open a document whose data source file is missing, Word will open a dialog box to force you to select a data source. The type of document can be determined from the processing information displayed in the status bar ("T" for template document, "F" for final document, etc).
For a template document, you can select any data source, as the correct data source will be re-attached when the template is processed.
If the process has completed abnormally, a new session will need to be started to reprocess remaining documents after any problems have been manually corrected.

IMPORTANT NOTE

The nature of this process is such that it could run for an extended period of time. Start the job on a PC where the Document Update can be left running as a 'stand alone' process. Also, depending on the number of documents being processed, and the number of log messages written, the amount of memory used will gradually increase. Although the memory allocation should not become excessive, it could easily get to 40 or more megabytes. Therefore we recommend executing the Document Update process on a PC with adequate physical memory, and a large amount of virtual memory.

Once the Document Update process has finished, you may view the Log File on the PC to determine if any errors were encountered. (Be sure not to start any other Uniface sessions on the PC before reviewing the Log File). Also, to release the memory allocated, it will be necessary to close the Uniface session once the processing is complete.

DOCUMENT UPDATE CONTROL USING RELINK.EXE
Relink.exe and Relink.doc have been provided in the Pathway "msc" subfolder to improve the speed at which the "Return To System" template can be updated in all Word documents. It is still necessary to use the "Word Processing >> Batch Functions >> Document Update Control" thick client menu option to update data sources on template documents (however, this is typically relatively quick).

Relink.exe can only be used if the length of the path to the "Return to System" template has not changed. For example, Relink.exe could be used if the path to the "Return to System" templates was previously \\SERVERONE\Share\Pathway\Prod\tpl\ww8 (38 characters long) and has now changed to \\SERVERTWO\Share\Pathway\Prod\tpl\ww8 (still 38 characters long). However, it could not be used if the new path was \\SERVERBACKUP\Share\Pathway\Prod\tpl\ww8 (41 characters long). A workaround would be to create a new share so that \\SERVERBACKUP\ExtraShare\Prod\tpl\ww8 is valid (38 characters long). Relink.exe could then be used (with the New Template Path specified as \\SERVERBACKUP\ExtraShare\Prod\tpl\ww8).

Relink.exe is a .NET 2.0 program and so requires that the .NET 2.0 framework be installed on the computer from which Relink.exe is run. Relink.exe will be faster if it is run on the computer hosting the Word documents.

EDMS INTEGRATION
When using the Word Processing Document Update Control to relink "Return to System" templates after moving the location of these templates it was not possible to make use of the new Relink.exe when documents are stored in an EDMS. The Document Update Control has been enhanced to provide the existing Word COM Automation mode but also an additional Direct File Update mode that uses the same technology as Relink.exe to do the relinking so is faster.

It is still recommended that Relink.exe be used if no EDMS is being used to store Pathway documents. Where an EDMS is being used to store Pathway documents the Document Update Control must be used but the Direct File Update mode gives better performance than the Word Automation mode.

Direct File Update mode has the same limitation as Relink.exe in that the new template path must be the same length as the old template path. See Relink.doc at the end of the help text or in the msc folder for more information.

Important note: Direct File Update mode makes use of .NET 2.0 code to get this performance improvement. This Document Update Control process is multithreaded so the actual work where the .NET code is activated occurs on a batch queue machine. Starting a batch queue automatically grants the necessary Code Access Security (CAS) permissions to allow the .NET code to run. If running this process interactively with no thread queues started the processing will occur on the local machine on which Code Access Security permissions have probably not been granted. The easiest way to grant these permissions is to start and stop a batch queue on the local machine before running the job in this scenario. A new Pathway session must be started after this is done. This should not be necessary for a live run where multiple batch queues should be used to reduce overall processing time. If permissions have not been granted a message similar to the following will appear in the Pathway message frame and the job will complete abnormally:

Call to managed function in Pathway.Interop.dll failed with the following exception:
ERROR=0x80020009MNEM=DESCRIPTION=Request for the permission of type
'System.Security.Permissions.EnvironmentPermission, mscorlib, Version=2.0.0.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089' failed.COMPONENT=W32NET.dllPROCNAME=Pathway.Interop

Application
This field displays the application name over which the process is to be run. Multi-select is available on these fields using the SHIFT or CONTROL keys while selecting.

Processing Options – Update Data Sources on Template Documents
Selection of this option will update the data sources on Template documents related to the application(s) selected in the Application field. Please refer to the processing steps outlined under 'Document Update Control Form' (134)

Processing Options – Update "Return to System" Template on All Documents.
Selection of this option will update the "Return to System" Template on all documents related to the application(s) selected in the Application field. Please refer to the processing steps outlined under 'Document Update Control Form' (134)

Update Mode
The Document Update Control has been enhanced to provide the existing Word Automation (COM) Update Mode but also an additional Direct File Update Mode that uses the same technology as Relink.exe to do the relinking and therefore is faster.

It is still recommended that Relink.exe be used if no EDMS is being used to store Pathway documents. Where an EDMS is being used to store Pathway documents the Document Update Control must be used but the Direct File Update mode gives better performance than the Word Automation mode.

Direct File Update mode has the same limitation as Relink.exe in that the new template path must be the same length as the old template path. See Relink.doc in the msc folder for more information.

Old Template Path
In the "Old Template Path" field enter the path of the folder containing the Word document templates to which the documents are currently linked. This folder typically contains doctype.dot, doctype2007.dotm, exttype.dot and mrgtype.dot. The matching is case insensitive so the casing of the "Old Template Path" does not matter.

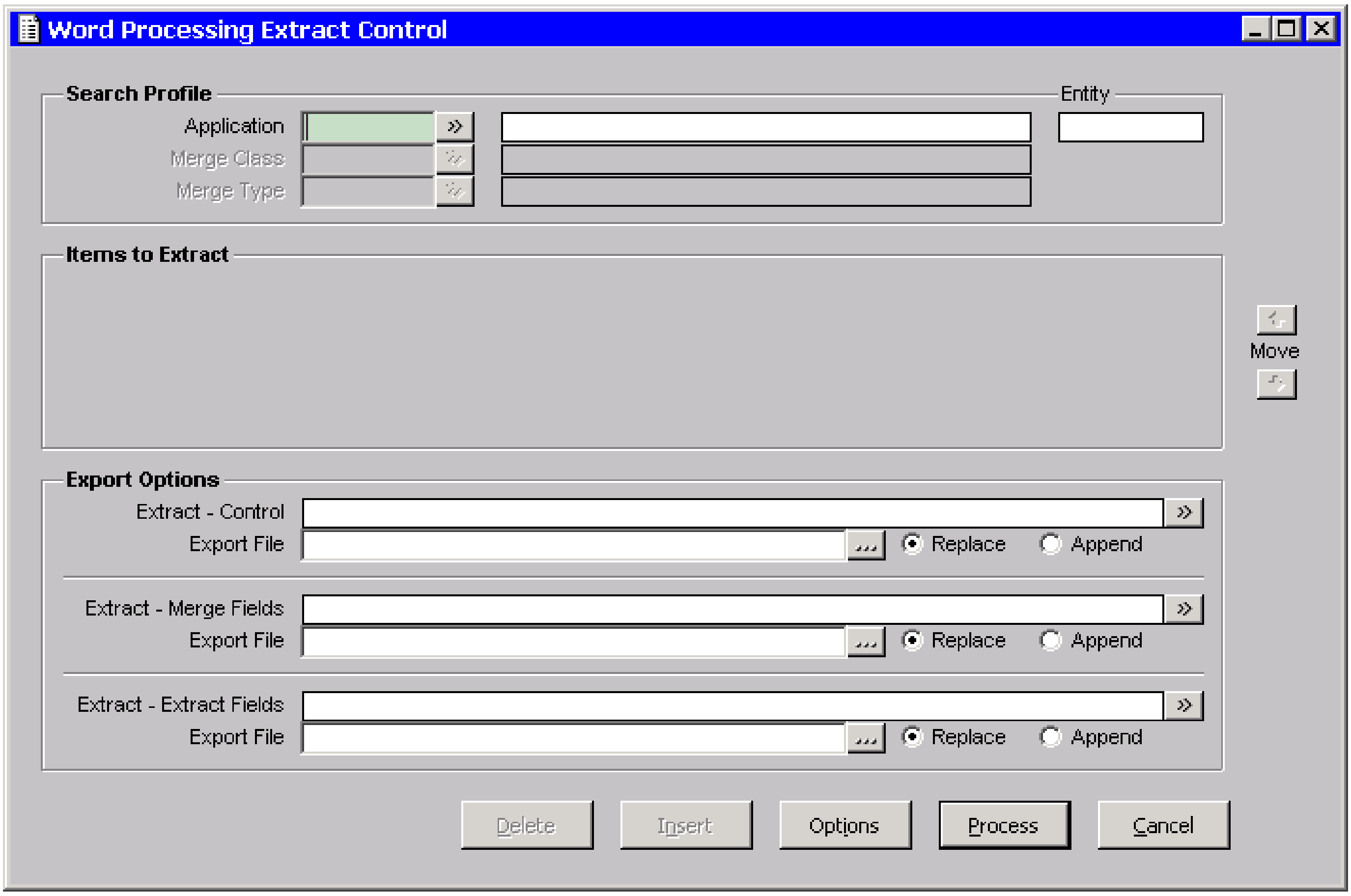
Word Processing Extract

This option should not be used without consultation from INFOR.

Word Processing Extract Control Form

The Word Process Extract option has been designed to extract Merge and Extract field information to allow access to this information from a third party. The information is put into multiple flat export files that can then be linked together to allow interrogation of the information provided.

The contents of these reporting entities can also be extracted to nominated files.



Word Processing Extract Control Form

Application

Enter the Application Code or choose from the list provided in the pop selection form. Only the following entities are available for selection:

- CNA Name and Address
- LAN Animal Control
- LDR Debtors
- LPA Property Administration
- LRA Rates Accounting
-

The entity selection has been predefined and can only be altered by INFOR.

Application is Mandatory

Merge Class

Once the entity has been selected, the Merge Class field will become available. Enter or select form the pop up list the Merge Class required.

Merge Class is Mandatory

Merge Type

Once the Merge Class has been selected, the Merge Types field will become available. Enter or select form the pop up list the Merge Type.

Should the Merge type field remain non maintainable after the selection of the Merge Class, then there are no valid Merge Types for that Application and Merge Type combination.

Merge Type is Mandatory

Items To Extract

Use the Insert button to add the 'Items to Include'. For Name and Address this will be the names that you wish to extract the merge type information for. For Animals, this will be the animal reference details. Insert as many as is required for your extract.

At least one Item to Extract must be inserted.

Export File

To export the information you will need to define a query definition. For the Control information you will need to define an export definition over entity CRPWP02.

Nominate an Export file to extract this information into a csv/txt file. Leave this field blank to export only to the database files.

Export File

To export the information you will need to define a query definition. For the Merge Field information you will need to define an export definition over entity CRPWP03.

Nominate an Export file to extract this information into a csv/txt file. Leave this field blank to export only to the database files.

Export File

To export the information you will need to define a query definition. For the Extract Field information you will need to define an export definition over entity CRPWP04.

Nominate an Export file to extract this information into a csv/txt file. Leave this field blank to export only to the database files.

Handy Hints

The generation of Extract Types and Merge Types via the appropriate Word Processor product assumes knowledge in the relevant product. Further assistance with the creation of these documents may require access to the appropriate Word Processing manual.

The following Chapter provides some general hints which may assist further in the document creation process.

The following topics are covered in this section:

Extract Types - Handy Hints

Include Statements - Word 6.0, 97, 2000, 2002, 2003, XP

Include Statements are required where an Extract List Type contains a Data Field which is a Detail Document.

For example: The Conditions Extract Lists enables a Detail condition document to be included in the Extract Type. This Detail Document is defined within the Property system and contains details of the actual condition.

The following steps are required to insert the Include Statement to enable printing of the detail document.

- From the Toolbar, Select the **Insert**, **Field** options
- Select Links and References category
- Select Include Text Field and Click on OK

This will insert an Include statement similar to the following :

{INCLUDETEXT *MERGEFORMAT}

- Position the cursor after the INCLUDETEXT and before the \. (ensure you leave a space after the end “T” in INCLUDETEXT)
- Click on the Insert Merge Field button on the Toolbar and select the appropriate Data Field (i.e. Detail Document).
- Remove the MERGEFORMAT statement which has been automatically inserted by Word to ensure that there is no bolding on the extracted data
- The Include statement should appear similar to the following **<u>up to this point</u>**.

{INCLUDETEXT {Mergefield Property_Cond_Document}}

Previously, when maintaining Associated Extract Types, it was only possible to associate *one* Extract Type based on a given Extract List with a parent Extract Type. As of Release 2.13 it is possible to associate *multiple* Extract Types based on a given Extract List with a parent Extract Type.

For example, imagine that there are three Extract Types based on the Property Parcel Conditions Extract List. Their filters are set up so that one picks out Heritage Conditions, one Road Widening Conditions, and the last picks out Local Environmental Plan Conditions. Instead of choosing just one of these Extract Types to associate with a parent that is based on the Parcels Extract List, all can now be chosen, enabling each type of Condition to be listed separately in final documents. This allows greater flexibility in the structure of documents such as Property Certificates.

In order to achieve this flexibility, it has been necessary to change the way that documents of Associated Extract Types are included in the parent document. Previously, a field in the Extract List of the parent Extract Type contained the path to the Associated Extract Type's document. This filename was used within an INCLUDETEXT field in Word, as in the following example:

{ INCLUDETEXT **{** MERGEFIELD Parcel_Condition_Document **} }**

During document generation, the filename in Extract List field "Parcel_Condition_Document" might have been something like "C:\\Temp\\LPA\\12.DOC". However, now that a parent Extract Type can have many

Associated Extract Types based on the same Extract List, such fields can no longer contain the full path to a "child" document. It is impossible to include multiple filenames in one Extract List field.

The relevant Extract List fields now contain only a partial filename. The remainder of the filename must be supplied when the INCLUDETEXT field is placed in the parent Extract Type's template document, and is made up of the relevant Associated Extract Type's Code, followed by ".DOC". Continuing the previous example, if the "Heritage Conditions" Extract Type had a Code of "HTGCND", the appropriate INCLUDETEXT field would be formatted as follows:

{ INCLUDETEXT "{ MERGEFIELD Parcel_Condition_Document }HTGCND.DOC" }

The quotes surrounding the filename are required, or the message "Error! Cannot open file." will appear in the final document. Also, there should be no spaces between the merge field and the rest of the text making up the filename. This arrangement with INCLUDETEXT fields should be kept in mind if changing an Extract Type's Code.

If a document for Local Environmental Plan Conditions was also to be included in the parent Extract Type's document at a different location, and the Associated Extract Type's Code was "LEPCND", then this is the INCLUDETEXT field that would be inserted at the desired point in the template document:

{ INCLUDETEXT "{ MERGEFIELD Parcel_Condition_Document }LEPCND.DOC" }

Please be aware that it still isn't possible to specify an Associated Extract Type with the same Extract Code and same base Extract List as another Associated Extract Type, a situation that might arise when dealing with Applications of different Classes against a Property, for instance. If an attempt is made to do this, a message will be displayed saying "There cannot be an Associated Extract Type with the same name and same base Extract List as another Associated Extract Type". Given that the choice of Extract Type Codes is almost limitless, however, this shouldn't present a problem.

There is a final caveat concerning applications that use the Pathway Editor (traditionally Receipting only). In these cases, the previous arrangement with Associated Extract Types remains. That is, only *one* Extract Type based on a given Extract List can be associated with a parent Extract Type.

General Handy Hints

Label Settings

When selecting Labels as a Merge Type, using Word 6 the system uses Custom Settings in the Merge Type Label Settings. You may wish to change these to suit the Label Types you have purchased. In order to do this, choose the Tools Option, then select Envelopes and Labels and adjust accordingly.

Borders Features in Word

When creating Certificates and Notices, you may wish to add a border to the document. This cannot be done simply by adding a border or frame in the document.

A Watermark must be created in a header on the first page of your Merge Type Template Document. The steps involved are:

- Open Template Document.
- Click on View - Headers and Footers.
- With your cursor in the header, click the rectangle option on your Drawing Tool Bar and insert a small rectangle into the header.
- When the rectangle is drawn, whilst it is still highlighted, select Format Option then Drawing Object from the Menu Bar.
- If you wish to have rounded corners on the Box, click on the Line Tab and check the “Round Corners” checkbox.
- Click on the Size and Position Tab and proceed to set up the size for your page. For example the average A4 size page would have the following options set:
- Position Horizontal and Vertical would be 1 cm from page, the Size Height of 27cm and Width of 18cm.
- You may need to manipulate the box on your page. To do this, use your View Headers and Footers, then click on the Rectangle. Drag or Move the Box sizing to suit. Using your View Document Button will show you how the Border will look on the Document. To further modify go back into View Headers and Footer and adjust. Once this is correct, then this border will appear on every page of the Document.

Extract Type Naming

When creating an Extract Code Type it is recommended that no blank spaces are entered in the name e.g. W8 TITLE is incorrect, it should be typed as W8TITLE.

During document generation the Extract Type Code is used as a Temporary file name and the spaces will cause the documents not to be found.

Word 7 Enable Macro Virus Protection

The Pathway product has a specific macro written to allow the direct editing of Word and Excel documents from within the system. For this to work effectively, the Enable Macro Virus Protection in Word 7 should be checked off. To do this the following steps are required.

- Go to Tools Menu
- General Tab
- Options Dialogue Box, then deselect - Enable Macro Virus Protection.

Word Basic Error Messages

You may encounter some Word Basic Errors when trying to create documents such as Certificates and Notices. Causes of these errors are normally things such as Merge Fields or Include Statements are not correctly entered or placed in your Merge Type Template Documents.

During your Merge, if there is a problem in your Document, the Word Option on your Task Bar will begin to flash. To see the error click on the option.

You need to check your Merge Template Document and may need to check your Extract Type Documents as well.

Most common problems are that Merge Fields or Extract Types have been left in your Template Document, but have been removed from your assigned lists.

Return to System

When accessing a Word Processing or Spreadsheet product from a Uniface form, a ‘Return to System’ option will be available on the Toolbar. This returns control back to the original option.

For example:
If defining Merge Types and the Edit Document button is used to access Word 6.0, Return to System will return to the Merge Type Maintenance form.

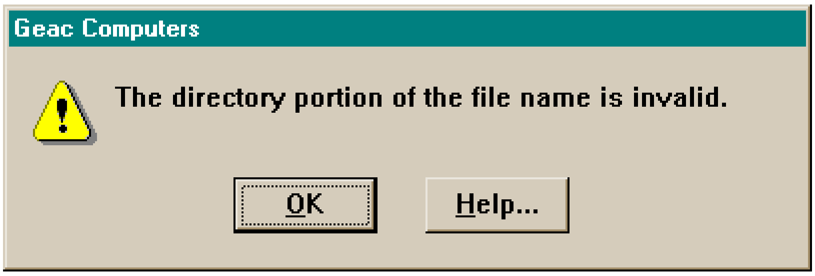
The Return to System option can also be set-up as a Toolbar button using the following steps

- From the Toolbar, Select the View, Toolbars option
- Ensure that the Return to System option is checked on and Click on OK
- This should enable a Return to System button on the Toolbar.

Error Messages

The following screens display the most common errors that occur within the Word Processing Package where directories are changed, or not setup correctly in the first place. An explanation is detailed below.

This message would be displayed when the filepath where Word is stored is incorrect.



This error may be displayed when you go into the Parameters of an application and try to access them or extract/merge types. This tells you that the Word Processor you have selected does not exist on your system or is not in the Path selected.

This error message will be displayed when the system cannot find the correct path to your “tpl” directory - this is normally found as a sub directory of your Pathway directory.

This message would normally display when the directory where the “INFOR Defined” header files are stored is incorrect.

In this situation the Document Directory in the Word Processing Parameters states that they are stored in C:\Temp – which, in this instance, is incorrect. They had actually been set up in a directory called G:\Melb\Word6. Once this directory is created, however, the header files can be generated to this directory.

This situation can occur when the Document Directory is changed and the header files are not regenerated.

When the header files are generated for either one or more of the Pathway modules, the following subdirectories are created in this document directory.

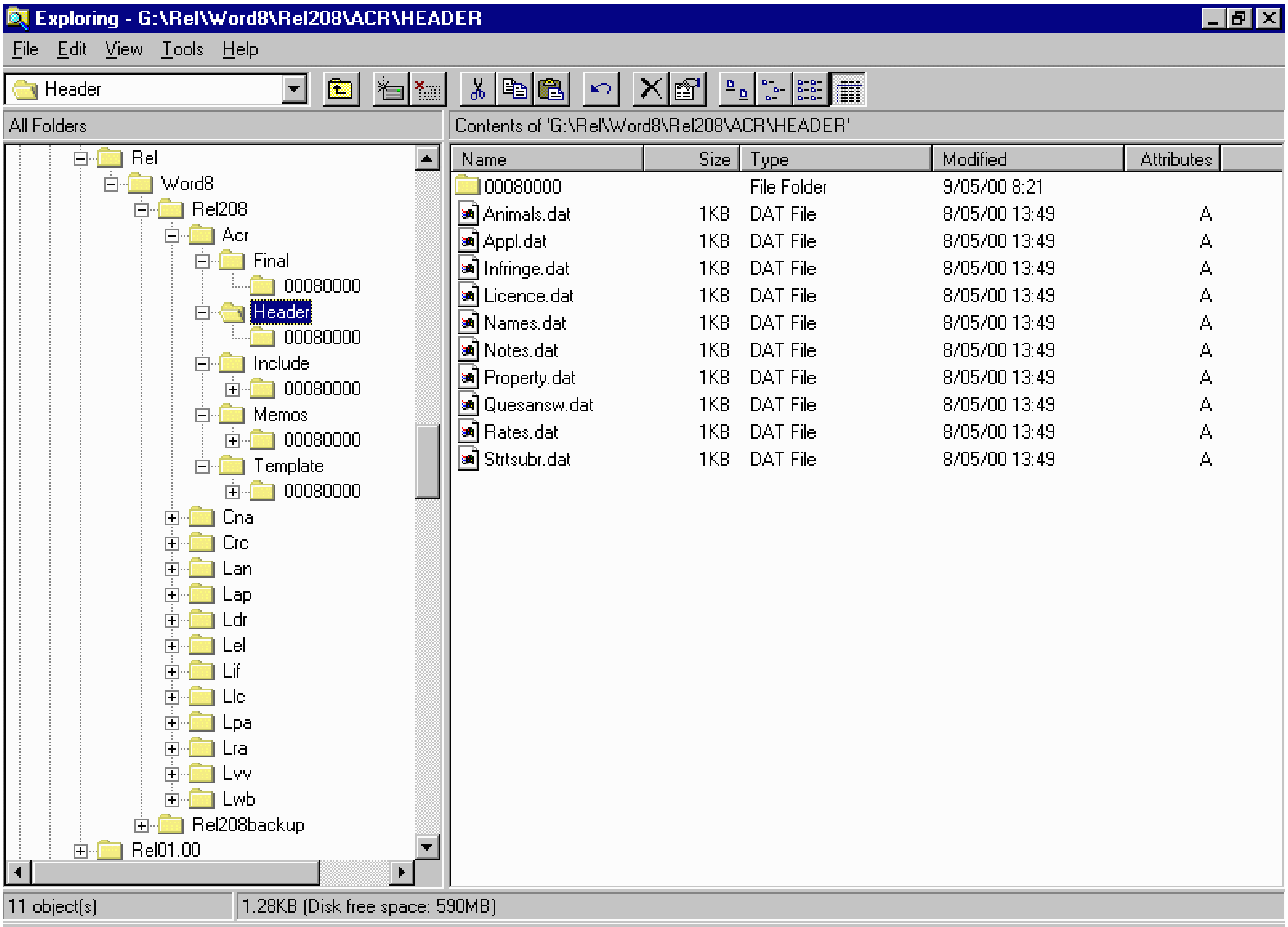
- LLC (Application Code)
  - Final
  - Header
  - Include
  - Template
- LAP
  - Final
  - Header
  - Include
  - Template
- LIF
  - Final
  - Header
  - Include

Template

ETC. Each application gets its own subdirectories.

Note: It is important to note that a document directory of C:\Temp or C:\XXX is not created because the templates will be created on the particular PC on which you generate the templates. Therefore no one else in the organisation can access the templates or documents which are created through them.

FINAL DIRECTORY -	\00000000\	Stores final resolved documents including documents attached to a condition.
INCLUDE DIRECTORY -	\00000000\	Stores the Yes and NO Document
TEMPLATE DIRECTORY -	\00000000\	Contains skeleton template documents for each App (Merge types and extract types)
HEADER DIRECTORY	\00000000\	Extract Lists Merge Type Header - files created interactively which identify the fields related to each merge type.



Example Document Directory Structure

This shows an example of the Explorer screen showing the directory structures.

Extra Carriage Returns within Documents

When Extract Types are included within a Merge Type document, extra lines may appear in the final document generated from Pathway.

Generally when Merge Types are created in Pathway and Extract Types are included, Word adds a carriage return at the end of the Extract Type. When the document is processed the carriage return/paragraph marker from the Extract Type document is included. This results in an extra line in the final document.

Word normally adds a paragraph marker at the end of any text in a document. This may cause a problem when an Extract Document is required to be inserted into a Merge Document on the same line as any following text, e.g.

This text is part of the Main Document however I have included the <Extract Document> in the middle of the text.

Normally, this would display as follows with a carriage return after the Extract Document text:

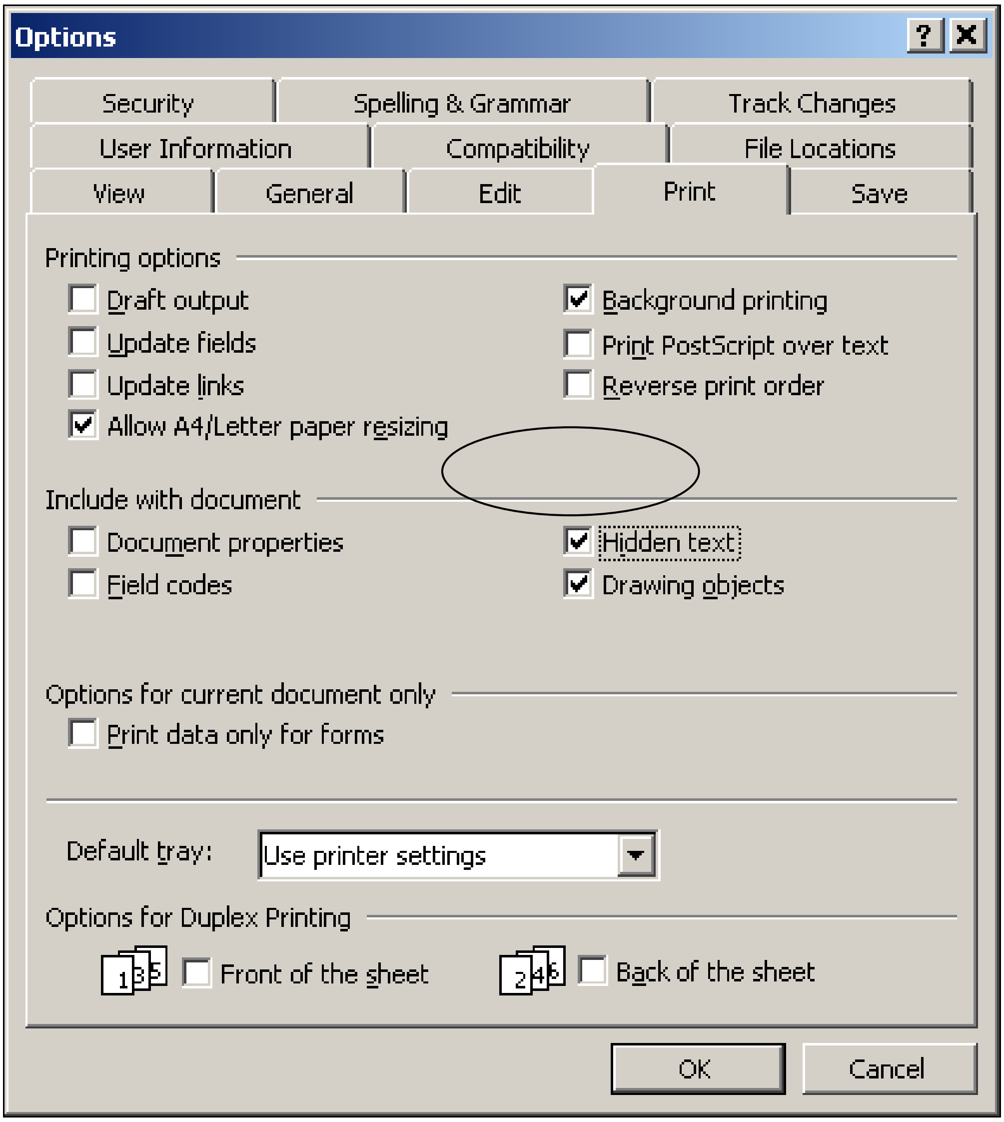
This text is part of the Main Document however I have included the <Extract Document> in the middle of the text.

The **Merge Template** for the above example would be similar to the following:

This text is part of the Main Document however I have included the {INCLUDETEXT C:\\TEMP\\ACR\\NAME2.DOC} in the middle of the text.

The carriage return in the Extract document cannot be removed as it is a function of Word to include one at the end of every document. However, in order to prevent the carriage return from starting a new line in the text, **the paragraph marker should be selected and formatted as Hidden Text (Format/Font/Hidden).** When the documents are merged, the paragraph marker is hidden and will only display and cause a carriage return when the Show/Hide button is turned on**.**

Note: Even though the carriage return may display on screen when the Show/Hide button is clicked on, when the document is printed, there will be no carriage return, unless the 'Hidden Text' flag is checked on in Print Options, e.g.



Character formatting of Extract Type data in Merge Documents

When an Extract type is included in a Merge Document (as above), the original character formatting of the Extract Type is retained in the Merge Document when the two documents are merged. This can be a problem if the Merge document has different character formatting from the Extract Type text.

This problem can be overridden by inserting a switch at the end of the field, as follows:

{INCLUDETEXT C:\\TEMP\\ACR\\NAME2.DOC * **CharFormat }**

This ensures that the extracted data will adopt the formatting of the first character of the field name, i.e. { **I**NCLU……..}

If an Extract Type is to be linked to various Merge Types, the character formatting required may be different in each Merge Document. This technique allows a generic Extract document to be created which can be linked to a number of Merge documents each with different character formatting.

Note: One limitation with this technique is that the paragraph marker at the end of the Extract Type document text will also take on this formatting and the hidden attribute, if applied to eliminate a carriage return (as in the previous section), will be removed.

Calculated Fields within the Header or Footer

Calculated fields can be included within the Header or Footer section on a Merge Type by using the following method:

1. Create a table to contain the fields to be included in the calculation (A1 and A2) plus an extra field for the calculation (A3)
2. Enter each field in a separate table cell
3. In the 'Calculation' cell (A3) use Word's Formula command from the Table Menu to insert a formula e.g. =A1-A2
4. Number formatting may be added if required e.g. to include $ and decimals

e.g.

<<Total_Amount>>
<<Discount>>
=A1-A2

Formatting Pathway Date fields in Word

You can make extracted Pathway Date field data look the way you want it to look by adding a switch to the mergefield in the Merge type template.

e.g. Document Issue Date: {MERGEFIELD Document_Issue_Date \@ "d MMMM yyyy"}

Other formats are available. Refer to Word Online help for more details.

IF Statement Fields

Prior to Release 3.05, the Smart Client document generation process did not appropriately handle "IF" function fields, which resulted in expressions not evaluating correctly. This problem was prevelant for expressions that involved checking whether a merge field was blank. The example below shows the declaration of an "IF" field that checks whether the merge field "Value" is blank. If the merge field isn't blank, the value of the merge field is merged into the document, otherwise the text, "Default Text", is merged into the document instead.

{ IF "{ MERGEFIELD Value }" <> " " "{ MERGEFIELD Value }" "Default Text" }

Example
The declaration of 'IF' fields within Pathway document templates will need to be changed for fields that involve testing the value of a merge field.

For example, the 'IF' field below tests whether the merge field, Field1, is blank;

{ IF { MERGEFIELD Field1 } <> " " "{ MERGEFIELD Field1 }" "Default Text" }

The declaration of 'IF' fields will need to be changed so that all merge fields are enclosed within quote (") characters.

i.e.

{ IF "{ MERGEFIELD Field1 }" <> " " "{ MERGEFIELD Field1 }" "Default Text" }

The changes specified above are necessary for documents generated within the Pathway Smart Client to ensure the evaluation of the field’s expression is successful and the correct content is merged in the generated document. The above changes do not impact the document generation process within the Pathway Thick Client.

Note: IF statements constructed similarly to those shown above can also be used in Headers and Footers, as well as Extract Type documents.

Application Extract Files

This section provides lists of Extract files available within the various applications.

Licensing - Extracts and Extracts with Filters

EXTRACT	DESCRIPTION	FILTER AVAILABLE	AVAILABLE FIELDS	ASSOCIATED EXTRACT LISTS
APPFEE	Licence Fees	Y	«Fee_Type» «Calculated_Fee» «Accepted_Fee» «Accepted_Fee_Tax» «Paid» «Paid_Tax» «Balance» «Refunded» «Status» «Transactions»	FEETRAN
AFFPROP COND	Licence Conditions	Y	«Lic_Cond_Code» «Lic_Cond_Description» «Lic_Cond_Apply_Date» «Lic_Cond_Lapse_Date» «Lic_Cond_Document»	
CONSENTS	Licence Consents	Y	«Consent_Nature» «Consent_Nature_Code» «Lodgement_Date» «Application_Date» «Expiry_Date» «Consent_Comment» «Consent_Required» «Decision_Type» «Decision_Type_Code» «Decision_Date» «Decision_Authority» «Decision_Authority_Code» «Rejection_Reason» «Rejection_Reason_Code» «Under_Appeal» «Decision_Comment» «Responsibility» «Responsibility_Code»	
DECISION	Licence Decisions	N	«Type» «Date» «Authority» «Rejection_Reason» «Under_Appeal» «Description» «Approval_Number»	
DEVCDIMS DEVCFEES DEVCQUES (only to be used as an	Development Category Questions	N	«Question» «Answer»	MAJMIN

Associated Extract)				
DISABLE				
FAILED				
FEEDB	Licensing Fees when using Pathway Debtor Accounting Method	N	«Fee_Code» «Fee_Description» «Line_Number» «Total_Fee_Amount» «Fee_Tax_Amount» «Fee_Net_Amount» «Fee_Taxable_Flag» «Fee_Balance» «Payment_Reference» «Total_Time»	
FEETRAN (only to be used as an Associated Extract)	Licence Fee Transaction	N	«Fee_Type» «Fee_Type_Code» «Transaction_Type» «Transaction_Type_Code» «Receipt_Number» «Date» «Amount» «Tax» «Comment»	
FOODMODS				
INSPECT	Inspections	Y	«Type» «Area» «Result» «Date» «Time» «Number» «Officer» «Officer_Id» «Requestor» «Locations» «Template_1» «Template_2» «Template_3» «Template_4» «Template_5» «Template_6» «Notes»	NOTES
LICDIMS	Licence Dimensions	Y	«Dimension» «Dimension_Value»	
LLC_ATT				
LOCATION	Licence Locations	N	«Licence_Locations»	
MAJMIN	Major & Minor Categories	N	«Major_Categories» «Minor_Categories»	
MISCDATA	Miscellaneous Licensing Data	Y	«Misc_Data_Type» «Date» «Value»	
NAMES	Licence Names/Roles	Y	«Role» «Identity» «Id_Address_Formatted» «Id_Address_1_Line»	

			«Id_Com_1» «Id_Com_2» «Id_Com_3» «Id_Info_1» «Id_Info_2» «Id_Info_3»	
NOTES (only to be used as an Associated Extract)	Inspection Notes	N	«Date» «Time» «Officer» «Officer_Id» «Note»	
PREMISES PURP	Purpose Codes	N	«Purpose_Code» «Purpose_Code_Desc» «Lic_Purp_Document» «Purpose_Comment»	
RECEIPTS	Licensing Receipts	Y	«Receipt_Number» «Receipt_Date» «Receipt_Amount» «Receipt_Tax» «Recipient_Name» «Recipient_Addr» «Fees»	FEETRAN
REFERENC VEHICLES	Vehicle Details	Y	«Registration_Number» «Date_Cancelled» «Vehicle_Make» «Vehicle_Model» «Comment»	
WORK				
PROPOWNERS	Owners of Affected Properties	N	«Owner_Name» «Owner_Address» «Owner_Address_1_Line»	

Licensing - General Fields available through Merge Types

Note: The following fields will retrieve the *overriding mailing address* for the name receiving the document:

Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»

The following fields will source their formatting rules from the Name and Address Role Type CWP 1 (In Name and Address Parameters). The formatting for the Salutation field is determined by formatting rules that are defined at the system level. If there are multiple companies then the Name and Address System Default Mailing Salutation will be used. Where there is only one company then the Mailing Salutation for that company will be used:

Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»

General Fields

Accepted Total	«Accepted_Total»
Accepted Total Tax	«Accepted_Total_Tax»
Affected Property	«Affected_Property»
AffectedProperty No Suburb/PostCode	«Affected_Property_Nsp»
Affected Property StAddr	«Affected_Property_StAddr»
All Formatted Titles	«All_Formatted_Titles»
All Locations	«All_Locations»
All Locations No Suburb/Post Code	«All_Locations_Nsp»
All Prop Addresses	«All_Prop_Addresses»
All Prop Addresses No Suburb/Post Code	«All_Prop_Addresses_Nsp»
All Prop Descr	«All_Prop_Descr»
Area Code	«Area_Code»
Assessment Number	«Assessment_Number»
Balance Total	«Balance_Total»
Brought Forward	«Brought_Forward»
Business Location Type	«Business_Location_Type»
Caretaker Address	«Caretaker_Address»
Caretaker Address 1 Line	«Caretaker_Address_1_Line»
Caretaker Comm 1	«Caretaker_Comm_1»
Caretaker Comm 2	«Caretaker_Comm_2»
Caretaker Comm 3	«Caretaker_Comm_3»
Caretaker Info 1	«Caretaker_Info_1»
Caretaker Info 2	«Caretaker_Info_2»
Caretaker Info 3	«Caretaker_Info_3»
Caretaker Name	«Caretaker_Name»
Carried Forward	«Carried_Forward»
Compliance Type Code	«Compliance_Type_Code»
Compliance Type Descr	«Compliance_Type_Descr»
Compliant	«Compliant»
Contact Address	«Contact_Address»
Contact Address 1 Line	«Contact_Address_1_Line»
Contact Comm 1	«Contact_Comm_1»
Contact Comm 2	«Contact_Comm_2»
Contact Comm 3	«Contact_Comm_3»
Contact Info 1	«Contact_Info_1»
Contact Info 2	«Contact_Info_2»
Contact Info 3	«Contact_Info_3»
Contact Name	«Contact_Name»
Date Compliance Checked	«Date_Compliance_Checked»
Date Premise Closed	«Date_Premise_Closed»

Date Premise Registered	«Date_Premise_Registered»
Date Registration Suspend	«Date_Registration_Suspend»
Decision Appeal	«Decision_Appeal»
Debtor Number	«Debtor_Number»
Decision Authority	«Decision_Authority»
Decision Comment	«Decision_Comment»
Decision Date	«Decision_Date»
Decision Number	«Decision_Number»
Decision Rejection Reason	«Decision_Rejection_Reason»
Decision Type	«Decision_Type»
Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»
Document Appl DPBARCODE	«Document_Appl_DPBARCODE»
Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»
Document Applicant Comm 1	«Document_Applicant_Comm_1»
Document Applicant Comm 2	«Document_Applicant_Comm_2»
Document Applicant Comm 3	«Document_Applicant_Comm_3»
Document Applicant Comm 4	«Document_Applicant_Comm_4»
Document Applicant Comm 5	«Document_Applicant_Comm_5»
Document Applicant Comm 6	«Document_Applicant_Comm_6»
Document Applicant Comm D	«Document_Applicant_Comm_D»
Document Applicant_DPID	«Document_Applicant_DPID»
Document Applicant Info 1	«Document_Applicant_Info_1»
Document Applicant Info 2	«Document_Applicant_Info_2»
Document Applicant Info 3	«Document_Applicant_Info_3»
Document Applicant Info 4	«Document_Applicant_Info_4»
Document Applicant Info 5	«Document_Applicant_Info_5»
Document Applicant Info 6	«Document_Applicant_Info_6»
Document Applicant Info D	«Document_Applicant_Info_D»
Document Applicant Name	«Document_Applicant_Name»
Document Completion Date	«Document_Completion_Date»
Document Deflt Comm Descr	«Document_Deflt_Comm_Descr»
Document Deflt Info Descr	«Document_Deflt_Info_Descr»
Document Expiry Date	«Document_Expiry_Date»
Document Fee Amount	«Document_Fee_Amount»
Document Issue Date	«Document_Issue_Date»
Document Lodgement Date	«Document_Lodgement_Date»
Document Name	«Document_Name»
Document Number	«Document_Number»
Document Path	«Document_Path»
Document Receipt Date	«Document_Receipt_Date»
Document Receipt Number	«Document_Receipt_Number»
Document Reference Date	«Document_Reference_Date»
Document Reference Number	«Document_Reference_Number»
Document Status	«Document_Status»
Document User Id	«Document_User_Id»
Document User Name	«Document_User_Name»
Document User Signature	«Document_User_Signature»
File Completed Date	«File_Completed_Date»
File Started Date	«File_Started_Date»
FSI Comments	«FSI_Comments»
FSS Trained Date	«FSS_Trained_Date»

Industry Type	«Industry_Type»
Invoice Date	«Invoice_Date»
Invoice Number	«Invoice_Number»
Language Spoken Code	«Language_Spoken_Code»
Language Spoken Descr	«Language_Spoken_Descr»
Last Inspection Date	«Last_Inspection_Date»
Last Inspection Inspector	«Last_Inspection_Inspector»
Last Inspection Time	«Last_Inspection_Time»
Licence Date	«Licence_Date»
Licence Expiry Date	«Licence_Expiry_Date»
Licence Issue Date	«Licence_Issue_Date»
Licence Number	«Licence_Number»
Licence Number Reference	«Licence_Number_Ref»
Licence Particulars	«Licence_Particulars»
Licence Status	«Licence_Status»
Licence Type	«Licence_Type»
Licencee Address	«Licencee_Address»
Licencee Address 1 Line	«Licencee_Address_1_Line»
Licencee Comm 1	«Licencee_Comm_1»
Licencee Comm 2	«Licencee_Comm_2»
Licencee Comm 3	«Licencee_Comm_3»
Licencee Info 1	«Licencee_Info_1»
Licencee Info 2	«Licencee_Info_2»
Licencee Info 3	«Licencee_Info_3»
Licencee Name	«Licencee_Name»
Lodgement Date	«Lodgement_Date»
LPA descriptor 1	«LPA_descriptor_1»
LPA descriptor 2	«LPA_descriptor_2»
LPA descriptor 3	«LPA_descriptor_3»
LPA descriptor 4	«LPA_descriptor_4»
LPA descriptor 5	«LPA_descriptor_5»
Merge Class Code	«Merge_Class_Code»
Merge Class Description	«Merge_Class_Description»
Merge Type Code	«Merge_Type_Code»
Merge Type Description	«Merge_Type_Description»
Merge Type Name	«Merge_Type_Name»
Merge Type Path	«Merge_Type_Path»
Next Inspection Date	«Next_Inspection_Date»
Next Inspection Inspector	«Next_Inspection_Inspector»
Next Inspection Time	«Next_Inspection_Time»
Num of FT Equiv Staff	«Num_of_FT_Equiv_Staff»
Number of Staff	«Number_Of_Staff»
Owner Address	«Owner_Address»
Owner Address 1 Line	«Owner_Address_1_Line»
Owner Comm 1	«Owner_Comm_1»
Owner Comm 2	«Owner_Comm_2»
Owner Comm 3	«Owner_Comm_3»
Owner Info 1	«Owner_Info_1»
Owner Info 2	«Owner_Info_2»
Owner Info 3	«Owner_Info_3»
Owner Name	«Owner_Name»
Paid Total	«Paid_Total»
Paid Total Tax	«Paid_Total_Tax»
Payment Reference	«Payment_Reference»
Premise Address	«Premise_Address»
Premise Address 1 Line	«Premise_Address_1_Line»
Premise Comm 1	«Premise_Comm_1»
Premise Comm 2	«Premise_Comm_2»
Premise Comm 3	«Premise_Comm_3»
Premise Info 1	«Premise_Info_1»
Premise Info 2	«Premise_Info_2»
Premise Info 3	«Premise_Info_3»
Premise Name	«Premise_Name»

Primary Location	«Primary_Location»
Primary Location No Suburb/Post Code	«Primary_Location_Nsp»
Primary Location M	«Primary_Location_M»
Primary Location MNo Suburb/Post Code	«Primary_Location_M_Nsp»
Primary Prop Address	«Primary_Prop_Address»
Primary Prop Address No Suburb/Post Code	«Primary_Prop_Address_Nsp»
Primary Prop Descr	«Primary_Prop_Descr»
Primary Prop Ward	«Primary_Prop_Ward»
Property Summary	«Property_Summary»
Property TPK	«Property_TPK»
Proprietor Address	«Proprietor_Address»
Proprietor Address 1 Line	«Proprietor_Address_1_Line»
Proprietor Comm 1	«Proprietor_Comm_1»
Proprietor Comm 2	«Proprietor_Comm_2»
Proprietor Comm 3	«Proprietor_Comm_3»
Proprietor Info 1	«Proprietor_Info_1»
Proprietor Info 2	«Proprietor_Info_2»
Proprietor Info 3	«Proprietor_Info_3»
Proprietor Name	«Proprietor_Name»
Recall Contact Address	«Recall_Contact_Address»
Recall Contact Adrs 1	«Recall_Contact_Adrs_1»
Recall Contact Comm 1	«Recall_Contact_Comm_1»
Recall Contact Comm 2	«Recall_Contact_Comm_2»
Recall Contact Comm 3	«Recall_Contact_Comm_3»
Recall Contact Info 1	«Recall_Contact_Info_1»
Recall Contact Info 2	«Recall_Contact_Info_2»
Recall Contact Info 3	«Recall_Contact_Info_3»
Recall Contact Name	«Recall_Contact_Name»
Responsibility Group	«Responsibility_Group»
Responsible Officer	«Responsible_Officer»
Risk Level Code	«Risk_Level_Code»
Risk Level Descr	«Risk_Level_Descr»
Safety Program Code	«Safety_Program_Code»
Safety Program Descr	«Safety_Program_Descr»
Safety Supervisor Address	«Safety_Supervisor_Address»
Safety Supervisor Adrs 1	«Safety_Supervisor_Adrs_1»
Safety Supervisor Comm 1	«Safety_Supervisor_Comm_1»
Safety Supervisor Comm 2	«Safety_Supervisor_Comm_2»
Safety Supervisor Comm 3	«Safety_Supervisor_Comm_3»
Safety Supervisor Info 1	«Safety_Supervisor_Info_1»
Safety Supervisor Info 2	«Safety_Supervisor_Info_2»
Safety Supervisor Info 3	«Safety_Supervisor_Info_3»
Safety Supervisor Name	«Safety_Supervisor_Name»
Site Description	«Site_Description»
Trade Business Name	«Trade_Business_Name»
Trade Waste Assm Num	«Trade_Waste_Assm_Num»
Trade Waste Gen Name	«Trade_Waste_Gen_Name»
Trade Waste Ref Num	«Trade_Waste_Ref_Num»
Trading Name Address	«Trading_Name_Address»
Trading Name Adrs 1 Line	«Trading_Name_Adrs_1_Line»
Trading Name Comm 1	«Trading_Name_Comm_1»
Trading Name Comm 2	«Trading_Name_Comm_2»
Trading Name Comm 3	«Trading_Name_Comm_3»
Trading Name Info 1	«Trading_Name_Info_1»
Trading Name Info 2	«Trading_Name_Info_2»
Trading Name Info 3	«Trading_Name_Info_3»
Trading Name Name	«Trading_Name_Name»
WasteType	«Waste_Type»

Applications - Extracts and Extracts with Filters

EXTRACT	DESCRIPTION	FILTER AVAILABLE	AVAILABLE FIELDS	ASSOCIATED EXTRACT LISTS
AFFPROP	Affected Properties	N	«Affected_Property» «Identity» «Identity_Role» «Mailing_Address»	
AMENDMNT	Amendments	N	«Date» «Description»	
APPDIMS	Application Dimensions	Y	«Dimension» «Dimension_Code» «Dimension_Value»	
BANK	Bank Details	N	«Bank_G_Number» «Bank_G_Date» «Bank_G_Bank» «Bank_G_Branch» «Bank_G_Bank_Reference» «Bank_G_Contributor» «Bank_G_Agreed_Value» «Bank_G_Due_Date» «Bank_G_Collected_Date» «Bank_G_Amount_Collected » «Bank_G_Comments» «Bank_G_Fees» «Bank_G_History»	BANKFEES BANKHIST
BANKFEES (only to be used as an Associated Extract)	Bank Guarantee Fee Transactions	N	«Bank_Fees_Type» «Bank_Fees_Code» «Bank_Fees_Date» «Bank_Fees_Amount»	
BANKHIST (only to be used as an Associated Extract)	Bank Guarantee Agreed Value History	N	«Bank_Hist_Date» «Bank_Hist_Agreed_Value» «Bank_Hist_Comments»	
BCDIMS (only to be used as an Associated Extract)	Building Classification Dimensions	Y	«Dimension» «Dimension_Code» «Dimension_Value»	
BLDCLASS	Building Classifications	Y	«Building_Class» «Building_Class_Descr» «Specific_Location» «Type_of_Building» «Type_of_Building_Descr» «Dimension_1_Code» «Dimension_1_Description» «Dimension_1_Value» «Dimension_2_Code» «Dimension_2_Description» «Dimension_2_Value» «Dimension_3_Code» «Dimension_3_Description» «Dimension_3_Value»	BCDIMS BLDTYPE

			«Dimensions»
BLDTYPE (only to be used as an Associated Extract)	Building Type	Y	«Building_Type_Code» «Building_Type_Descr» «Component_1_Code» «Component_1_Descr» «Component_2_Code» «Component_2_Descr» «Component_3_Code» «Component_3_Descr» «Component_4_Code» «Component_4_Descr» «Component_5_Code» «Component_5_Descr» «Component_6_Code» «Component_6_Descr» «Component_7_Code» «Component_7_Descr» «Component_8_Code» «Component_8_Descr» «Component_9_Code» «Component_9_Descr» «Demolish_Dwellings» «Dueal_Occupancy» «Floor_Area» «Intended_Owner» «Material_1_Code» «Material_1_Descr» «Material_2_Code» «Material_2_Descr» «Material_3_Code» «Material_3_Descr» «Material_4_Code» «Material_4_Descr» «Material_5_Code» «Material_5_Descr» «Material_6_Code» «Material_6_Descr» «Material_7_Code» «Material_7_Descr» «Material_8_Code» «Material_8_Descr» «Material_9_Code» «Material_9_Descr» «New_Used_Materials» «Number_Of_Storeys» «Number_Of_Units» «Preexisting_Dwellings» «Private_Certifier» «Septic_Tank» «Trade_List» «Work_Type_1» «Work_Type_2» «Work_Type_3» «Work_Type_4» «Work_Type_5» «Work_Type_6» «Work_Type_7» «Work_Type_8» «Work_Type_9»
COND	Application Conditions	Y	«App_Cond_Code» «App_Cond_Description»

			«App_Cond_Apply_Date» «App_Cond_Lapse_Date» «App_Cond_Document» «Document_TPK»	
CONSENTS	Application Consents	Y	«Consent_Type_Code» «Consent_Nature» «Consent_Nature_Code» «Lodgement_Date» «Application_Date» «Expiry_Date» «Consent_Comment» «Consent_Required» «Decision_Type» «Decision_Type_Code» «Decision_Date» «Decision_Authority» «Decision_Authority_Code» «Rejection_Reason» «Rejection_Reason_Code» «Under_Appeal» «Decision_Comment» «Responsibility» «Responsibility_Code»	
DECISION	Application Decisions	N	«Approval_Number» «Type» «Date» «Effective_Date» «Authority» «Rejection_Reason» «Under_Appeal» «Description»	
DEVCDIMS DEVCFEES DEVCQUES (only to be used as an Associated Extract)	Development Category Questions	N	«Question» «Answer»	MAJMIN
DEVDEPT	Development Departures	N	«Instrument» «Clause» «Standard» «Approved» «Date_Entered» «Departure_Basis»	
DEVDIMS	Development Dimensions	N	«Dimension» «Dimension_Code» «Dimension_Value»	
EXTD	Extensions	N	«Extension_Date» «Extension_Reason_Code» «Extension_Reason» «From_To_Be_Commenced » «From_To_Be_Completed» «From_Expiry» «To_To_Be_Commenced» «To_To_Be_Completed» «To_Expiry»	

			«Narrative»	
FEEDB	Application Fees when using Pathway Debtor Accounting Method	N	«Fee_Code» «Fee_Description» «Line_Number» «Total_Fee_Amount» «Fee_Tax_Amount» «Fee_Net_Amount» «Fee_Taxable_Flag» «Fee_Balance» «Payment_Reference» «Total_Time»	
FEES	Application / Contribution Fees	Y	«Fee_Type» «Calculated_Fee» «Accepted_Fee» «Accepted_Fee_Tax» «Paid» «Paid_Tax» «Balance» «Refunded» «Status» «Paid_NC» «Bank_Guarantee» «Transactions»	FEETRAN
FEETRAN (only to be used as an Associated Extract)	Application Fee Transaction		«Fee_Type» «Fee_Type_Code» «Transaction_Type» «Transaction_Type_Code» «Receipt_Number» «Non_Cash_Number» «Date» «Amount» «Tax» «Comment»	
INSPECT	Inspections	N	«Type» «Area» «Result» «Date» «Time» «Number» «Officer» «Officer_Id» «Requestor» «Locations» «Template_1» «Template_2» «Template_3» «Template_4» «Template_5» «Template_6» «Notes»	NOTES
JOINTAPP	Joint Applications	N	«Class» «Type» «Application_Number»	
LANDUSE	Land Uses	Y	«Land_Use_Level» «Parcel_Description» «Land_Use_Approved_Code »	

			«Land_Use_Approved_Desc» «Land_Use_Actual_Code» «Land_Use_Actual_Desc» «Land_Use_Date_Approved» «Land_Use_Building_Level» «Land_Use_Percentage» «Land_Use_Approved_Doc» «Land_Use_Status» «Land_Use_Date_Actual» «Land_Use_Actual_Doc»	
LOCATION	Application Locations	N	«Location» «AutoMergeField»	
MAJMIN	Major & Minor Categories	N	«Major_Categories» «Minor_Categories»	
MISCDATA	Miscellaneous Data	Y	«Misc_Data_Type» «Date» «Value»	
NAMES	Application Names/Roles	Y	«Role» «Identity» «Id_Address_Formatted» «Id_Address_1_Line» «Id_Com_1» «Id_Com_2» «Id_Com_3» «Id_Info_1» «Id_Info_2» «Id_Info_3»	
NONCASH	Non-Cash	N	«Non_Cash_Number» «Non_Cash_Date» «Non_Cash_Type» «Non_Cash_Description» «Non_Cash_Agreed_Value» «Non_Cash_Payment_Type» «Non_Cash_Contributor» «Non_Cash_Location» «Non_Cash_Valuer» «Non_Cash_Valuation_Date» «Non_Cash_Dimension_Value» «Non_Cash_Work_Completed» «Non_Cash_Comments» «Fees»	FEETRAN
NOTES (only to be used as an Associated Extract)	Inspection Notes	N	«Date» «Time» «Officer» «Officer_Id» «Note»	
PARCEL	Application Parcels	N	«Formatted_Parcel»	
PARCPLAN	Plans on a Parcel	Y	«Parc_Plan_Amend_Date» «Parc_Plan_Comments» «Parc_Plan_Consent_Date» «Parc_Plan_External_Ref» «Parc_Plan_Gazette_Date»	

			«Parc_Plan_Gazette_Number» «Parc_Plan_Number» «Parc_Plan_Purpose_Code» «Parc_Plan_Purpose_Descr» «Parc_Plan_Receive_Date» «Parc_Plan_Registered_Date» «Parc_Plan_Response_Name» «Parc_Plan_Subdivision» «Parc_Plan_Type_Code» «Parc_Plan_Type_Descr» «Parc_Plan_Type_Prefix»
PERMCERT	Permits & Certificates	Y	«Type» «Number» «Issued_Date» «Expiry_Date» «Effective_Date» «Description» «Perm_Cert_Locations» «Insurer_Name» «Insurer_Address» «Insurer_Address_1_Line» «Ins_Date» «Ins_Liability» «Insured_Name» «Insured_Address» «Ins_Builder_Name» «Ins_Builder_Address» «Ins_Comments» «Levy_Name» «Levy_Address» «Levy_Address_1_Line» «Levy_Amount» «Levy_Date» «Levy_Receipt»
PLANCOND (Permits & Certificates)	Conditions on a Plan	Y	«Plan_Cond_Descr» «Plan_Cond_Applied_Date» «Plan_Cond_Lapse_Date» «Plan_Cond_Doc»
PLPACOND (Permits & Certificates)	Conditions on a Plan on a Parcel	Y	«Parc_Plan_Cond_Descr» «Parc_Plan_Cond_Appl_Date» «Parc_Plan_Cond_Lapse_Date» «Parc_Plan_Cond_Doc» «Parc_Plan_Cond_Doc_TPK»
PROPPLAN (Permits & Certificates)	Plans on a Property	Y	«Plan_Comments» «Plan_Consent_Date» «Plan_External_Ref» «Plan_Gazette_Date» «Plan_Gazette_Number» «Plan_Number» «Plan_Purpose_Code» «Plan_Purpose_Descr» «Plan_Receive_Date»

			«Plan_Registered_Date» «Plan_Response_Name» «Plan_Subdivision» «Plan_Type_Code» «Plan_Type_Descr» «Plan_Type_Prefix»	
RECEIPTS (Permits & Certificates)	Application Receipts	Y	«Receipt_Number» «Receipt_Date» «Receipt_Amount» «Receipt_Tax» «Recipient_Name» «Recipient_Addr» «Fees»	FEETRAN
RELATED	Related Applications	N	«Application_Number» «Class» «Type» «Application_Description» «Lodgement_Date»	
RESPONSE	Responses	N	«Response_Name» «Response_Address» «Response_Address_1» «Response_Date» «Response_Type_Code» «Response_Type_Descr» «Response_Summary»	
SUBDIMS	Subdivision Dimensions	Y	«Dimension» «Dimension_Code» «Dimension_Value»	
TITLE	Application titles	Y	«Formatted_Title»	
ZONES	Zone Use	Y	«Location» «Zone_Use» «Status»	
PROPOWNERS	Owners of Affected Properties	N	«Owner_Name» «Owner_Address» «Owner_Address_1_Line»	

Applications - General Fields available through Merge Types

Note: The following fields will retrieve the *overriding mailing address* for the name receiving the document:

Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»

The following fields will source their formatting rules from the Name and Address Role Type CWP 1 (In Name and Address Parameters). The formatting for the Salutation field is determined by formatting rules that are defined at the system level. If there are multiple companies then the Name and Address System Default Mailing Salutation will be used. Where there is only one company then the Mailing Salutation for that company will be used:

Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»

General Fields

Accepted Total	«Accepted_Total»
Accepted Total Tax	«Accepted_Total_Tax»
Affected Property	«Affected_Property»
Affected Property StAddr	«Affected_Property_StAddr»
All Formatted Titles	«All_Formatted_Titles»
All Locations	«All_Locations»
All Prop Addresses	«All_Prop_Addresses»
All Prop Descr	«All_Prop_Descr»
Amount Retained	«Amount_Retained»
Applicant Address	«Applicant_Address»
Applicant Address 1 Line	«Applicant_Address_1_Line»
Applicant Comm 1	«Applicant_Comm_1»
Applicant Comm 2	«Applicant_Comm_2»
Applicant Comm 3	«Applicant_Comm_3»
Applicant Info 1	«Applicant_Info_1»
Applicant Info 2	«Applicant_Info_2»
Applicant Info 3	«Applicant_Info_3»
Applicant Name	«Applicant_Name»
Application Date	«Application_Date»
Application Expiry Date	«Application_Expiry_Date»
Application Number	«Application_Number»
Application Number Reference	«Application_Number_Ref»
Application Status	«Application_Status»
Application Type	«Application_Type»
Architect Address	«Architect_Address»
Architect Address 1 Line	«Architect_Address_1_Line»
Architect Comm 1	«Architect_Comm_1»
Architect Comm 2	«Architect_Comm_2»
Architect Comm 3	«Architect_Comm_3»
Architect Info 1	«Architect_Info_1»
Architect Info 2	«Architect_Info_2»
Architect Info 3	«Architect_Info_3»
Architect Name	«Architect_Name»
Balance Total	«Balance_Total»
Brought Forward	«Brought_Forward»
Builder Address	«Builder_Address»
Builder Address 1 Line	«Builder_Address_1_Line»
Builder Comm 1	«Builder_Comm_1»
Builder Comm 2	«Builder_Comm_2»
Builder Comm 3	«Builder_Comm_3»

Builder Info 1	«Builder_Info_1»
Builder Info 2	«Builder_Info_2»
Builder Info 3	«Builder_Info_3»
Builder Name	«Builder_Name»
Building Surveyor Address	«Building_Surveyor_Address»
Building Surveyor Adrs 1	«Building_Surveyor_Adrs_1»
Building Surveyor Comm 1	«Building_Surveyor_Comm_1»
Building Surveyor Comm 2	«Building_Surveyor_Comm_2»
Building Surveyor Comm 3	«Building_Surveyor_Comm_3»
Building Surveyor Info 1	«Building_Surveyor_Info_1»
Building Surveyor Info 2	«Building_Surveyor_Info_2»
Building Surveyor Info 3	«Building_Surveyor_Info_3»
Building Surveyor Name	«Building_Surveyor_Name»
Calculated Total	«Calculated_Total»
Carried Forward	«Carried_Forward»
Cons Approved Date	«Cons_Approved_Date»
Cons Office Number	«Cons_Office_Number»
Cons Received Date	«Cons_Received_Date»
Consultant Address	«Consultant_Address»
Consultant Address 1 Line	«Consultant_Address_1_Line»
Consultant Comm 1	«Consultant_Comm_1»
Consultant Comm 2	«Consultant_Comm_2»
Consultant Comm 3	«Consultant_Comm_3»
Consultant Info 1	«Consultant_Info_1»
Consultant Info 2	«Consultant_Info_2»
Consultant Info 3	«Consultant_Info_3»
Consultant Name	«Consultant_Name»
Contractor Address	«Contractor_Address»
Contractor Address 1 Line	«Contractor_Address_1_Line»
Contractor Comm 1	«Contractor_Comm_1»
Contractor Comm 2	«Contractor_Comm_2»
Contractor Comm 3	«Contractor_Comm_3»
Contractor Info 1	«Contractor_Info_1»
Contractor Info 2	«Contractor_Info_2»
Contractor Info 3	«Contractor_Info_3»
Contractor Name	«Contractor_Name»
Contrib Accepted Tot tax	«Contrib_Accepted_Tot_tax»
Contrib Accepted Total	«Contrib_Accepted_Total»
Contrib Balance Total	«Contrib_Balance_Total»
Contrib BG Total	«Contrib_BG_Total»
Contrib Calculated Total	«Contrib_Calculated_Total»
Contrib Paid Tot Tax	«Contrib_Paid_Tot_Tax»
Contrib Paid Total	«Contrib_Paid_Total»
Debtor Number	«Debtor_Number»
Decision Appeal	«Decision_Appeal»
Decision Authority	«Decision_Authority»
Decision Comment	«Decision_Comment»
Decision Date	«Decision_Date»
Decision Number	«Decision_Number»
Decision Rejection Reason	«Decision_Rejection_Reason»
Decision Type	«Decision_Type»
Description	«Description»
Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»
Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»
Document Applicant Comm 1	«Document_Applicant_Comm_1»
Document Applicant Comm 2	«Document_Applicant_Comm_2»
Document Applicant Comm 3	«Document_Applicant_Comm_3»
Document Applicant Comm 4	«Document_Applicant_Comm_4»
Document Applicant Comm 5	«Document_Applicant_Comm_5»
Document Applicant Comm 6	«Document_Applicant_Comm_6»
Document Applicant Comm D	«Document_Applicant_Comm_D»

Document Applicant Info 1	«Document_Applicant_Info_1»
Document Applicant Info 2	«Document_Applicant_Info_2»
Document Applicant Info 3	«Document_Applicant_Info_3»
Document Applicant Info 4	«Document_Applicant_Info_4»
Document Applicant Info 5	«Document_Applicant_Info_5»
Document Applicant Info 6	«Document_Applicant_Info_6»
Document Applicant Info D	«Document_Applicant_Info_D»
Document Applicant Name	«Document_Applicant_Name»
Document Completion Date	«Document_Completion_Date»
Document Deflt Comm Descr	«Document_Deflt_Comm_Descr»
Document Deflt Info Descr	«Document_Deflt_Info_Descr»
Document Expiry Date	«Document_Expiry_Date»
Document Fee Amount	«Document_Fee_Amount»
Document Issue Date	«Document_Issue_Date»
Document Lodgement Date	«Document_Lodgement_Date»
Document Name	«Document_Name»
Document Number	«Document_Number»
Document Path	«Document_Path»
Document Receipt Date	«Document_Receipt_Date»
Document Receipt Number	«Document_Receipt_Number»
Document Reference Date	«Document_Reference_Date»
Document Reference Number	«Document_Reference_Number»
Document Status	«Document_Status»
Document User Id	«Document_User_Id»
Document User Name	«Document_User_Name»
Document User Signature	«Document_User_Signature»
Endorsement Date	«Endorsement_Date»
Engineer Address	«Engineer_Address»
Engineer Address 1 Line	«Engineer_Address_1_Line»
Engineer Comm 1	«Engineer_Comm_1»
Engineer Comm 2	«Engineer_Comm_2»
Engineer Comm 3	«Engineer_Comm_3»
Engineer Info 1	«Engineer_Info_1»
Engineer Info 2	«Engineer_Info_2»
Engineer Info 3	«Engineer_Info_3»
Engineer Name	«Engineer_Name»
File Completed Date	«File_Completed_Date»
File Started Date	«File_Started_Date»
Floor Area Ratio	«Floor_Area_Ratio»
Guarantee Amount	«Guarantee_Amount»
Guarantee Details	«Guarantee_Details»
Intended Owner	«Intended_Owner»
Invoice Date	«Invoice_Date»
Invoice Number	«Invoice_Number»
Last Inspection Date	«Last_Inspection_Date»
Last Inspection Inspector	«Last_Inspection_Inspector»
Last Inspection Time	«Last_Inspection_Time»
Linen Approved Date	«Linen_Approved_Date»
Linen Received Date	«Linen_Received_Date»
Linen Sent Date	«Linen_Sent_Date»
Lodgement Date	«Lodgement_Date»
LPA descriptor 1	«LPA_descriptor_1»
LPA descriptor 2	«LPA_descriptor_2»
LPA descriptor 3	«LPA_descriptor_3»
LPA descriptor 4	«LPA_descriptor_4»
LPA descriptor 5	«LPA_descriptor_5»
Merge Class Code	«Merge_Class_Code»
Merge Class Description	«Merge_Class_Description»
Merge Type Code	«Merge_Type_Code»
Merge Type Description	«Merge_Type_Description»
Merge Type Name	«Merge_Type_Name»
Merge Type Path	«Merge_Type_Path»
Municipality ABS Code	«Municipality_ABS_Code»

Municipality BCC Code	«Municipality_BCC_Code»
Municipality Code	«Municipality_Code»
Municipality Descr	«Municipality_Descr»
Next Inspection Date	«Next_Inspection_Date»
Next Inspection Inspector	«Next_Inspection_Inspector»
Next Inspection Time	«Next_Inspection_Time»
Open Space Ratio	«Open_Space_Ratio»
Owner Address	«Owner_Address»
Owner Address 1 Line	«Owner_Address_1_Line»
Owner Comm 1	«Owner_Comm_1»
Owner Comm 2	«Owner_Comm_2»
Owner Comm 3	«Owner_Comm_3»
Owner Info 1	«Owner_Info_1»
Owner Info 2	«Owner_Info_2»
Owner Info 3	«Owner_Info_3»
Owner Name	«Owner_Name»
Paid Total	«Paid_Total»
Paid Total Tax	«Paid_Total_Tax»
Decision Appeal	«Decision_Appeal»
Payment Reference	«Payment_Reference»
Plumber Address 1 Line	«Plumber_Address_1_Line»
Plumber Comm 1	«Plumber_Comm_1»
Plumber Comm 2	«Plumber_Comm_2»
Plumber Comm 3	«Plumber_Comm_3»
Plumber Info 1	«Plumber_Info_1»
Plumber Info 2	«Plumber_Info_2»
Plumber Info 3	«Plumber_Info_3»
Plumber Name	«Plumber_Name»
Primary Location	«Primary_Location»
Primary Location M	«Primary_Location_M»
Primary Prop Address	«Primary_Prop_Address»
Primary Prop Descr	«Primary_Prop_Descr»
Primary Prop Ward	«Primary_Prop_Ward»
Processing Group	«Processing_Group»
Property Summary	«Property_Summary»
Response Address	«Response_Address»
Response Address 1	«Response_Address_1»
Response Date	«Response_Date»
Response Name	«Response_Name»
Response Summary	«Response_Summary»
Response Type Code	«Response_Type_Code»
Response Type Descr	«Response_Type_Descr»
Responsibility Group	«Responsibility_Group»
Setback Front	«Setback_Front»
Setback Left	«Setback_Left»
Setback Rear	«Setback_Rear»
Setback Right	«Setback_Right»
Site Description	«Site_Description»
Total Land Area	«Total_Land_Area»
Total Responses Received	«Total_Responses_Received»
Type Of Building	«Type_Of_Building»
Work Commenced Date	«Work_Commenced_Date»
Work Completed Date	«Work_Completed_Date»
Work To Be Commenced By	«Work_To_Be_Commenced_By»
Work To Be Completed By	«Work_To_Be_Completed_By»
Work Type	«Work_Type»

Property - Extracts and Extracts with Filters

EXTRACT	DESCRIPTION	FILTER AVAILABLE	AVAILABLE FIELDS	ASSOCIATED EXTRACT LISTS
ALLAPPL	All Applications on a Property and Sub-Properties	Y	«Applicant_Name» «Applicant_Address» «Application_Date» «Application_Expiry_Date» «Application_Number» «Application_Status» «Application_Type» «Lodgement_Date» «Description» «Decision_Date» «Decision_Number» «Decision_Type» «Application_Cond_Document»	COND (from Applications) LOCATIONS (from Applications and/or Licences)
ALLASSM	All Assessments on a Property	Y	«Ass_Assm_Number» «Ass_Admin» «Ass_AdminPending» «Ass_Assm_Location» «Ass_Deferred_RatesArr» «Ass_Deferred_RatesCur» «Ass_Discount_Date» «Ass_Instal_Int» «Ass_Instal_IntPending» «Ass_OutstandingDeferred» «Ass_InterestPending» «Ass_InterestPending_Date» «Meter_Details» «Ass_Assm_Check_Digit» «Ass_Assm_Status» «Ass_Assm_Status_Date» «Ass_VG_Number» «Ass_VG_Tenancy_Number» «Ass_Ratepayer_Name» «Ass_Ratepayer_Address» «Ass_Consumer_Name» «Ass_Consumer_Address» «Ass_Current_Period_Date» «Ass_Last_End_Of_Pd_Date» «Ass_Interest_Date» «Ass_Pay_By_Date» «Ass_Rates_Declared_Date» «Ass_Arrears» «Ass_Rates_Gross» «Ass_Rates_Less_Rebates» «Ass_Rates_Less_Discount» «Ass_InterestArrears» «Ass_InterestCurrent» «Ass_All_Interest» «Ass_Rebates» «Ass_Legal_FeesCurrent» «Ass_Legal_FeesArrears» «Ass_Discount» «Ass_DiscountPending» «Ass_All_Txns_Less_Rebs»	METERS

«Ass_All_Txns»
«Ass_Payments»
«Ass_Balance»
«Ass_Overpayments»
«Ass_OutstandingInterest»
«Ass_OutstandingCurrent»
«Ass_OutstandingArrears»
«Ass_PostponedArrears»
«Ass_PostponedCurrent»
«Ass_PostponedInterest»
«Ass_RefundsSmall_Bal»
«Ass_DueBalance»
«Ass_RebatesPending»
«Ass_BalancePending»
«Ass_Valuation_Effect_Date»
«Ass_Rateable_Valuation»
«Ass_Valuation_Descr_1»
«Ass_Valuation_1»
«Ass_Valuation_Descr_2»
«Ass_Valuation_2»
«Ass_Valuation_Descr_3»
«Ass_Valuation_3»
«Ass_Valuation_Descr_4»
«Ass_Valuation_4»
«Ass_Valuation_Descr_5»
«Ass_Valuation_5»
«Catg1_Rates_Less_Discount
»
«Catg1_RebatesPending»
«Catg1_DiscountPending»
«Catg1_Balance»
«Catg1_Instal_Int»
«Catg2_Rates_Less_Discount
»
«Catg2_RebatesPending»
«Catg2_DiscountPending»
«Catg2_Balance»
«Catg2_Instal_Int»
«Catg3_Rates_Less_Discount
»
«Catg3_RebatesPending»
«Catg3_DiscountPending»
«Catg3_Balance»
«Catg3_Instal_Int»
«Catg4_Rates_Less_Discount
»
«Catg4_RebatesPending»
«Catg4_Balance»
«Catg4_Instal_Int»
«Catg4_DiscountPending»
«Ass_Valuation_Descr_6»
«Catg5_Rates_Less_Discount
»
«Catg5_RebatesPending»
«Catg5_DiscountPending»
«Catg5_Balance»
«Catg5_Instal_Int»
«Catg6_Rates_Less_Discount
»
«Catg6_RebatesPending»
«Catg6_DiscountPending»
«Catg6_Balance»
«Catg6_Instal_Int»

«Ass_Valuation_6»
«Ass_Valuation_Descr_7»
«Ass_Valuation_7»
«Ass_Valuation_Descr_8»
«Ass_Valuation_8»
«Ass_Valuation_Descr_9»
«Ass_Valuation_9»
«Ass_Valuation_Descr_10»
«Ass_Valuation_10»
«Catg1_Description»
«Catg1_Arrears»
«Catg1_Rates_Gross»
«Catg1_Rates_Less_Rebates
»
«Catg1_Rebates»
«Catg1_InterestCurrent»
«Catg1_InterestArrears»
«Catg1_Legal_FeesCurrent»
«Catg1_Legal_FeesArrears»
«Catg1_Discount»
«Catg1_All_Txns_Less_Rebs»
«Catg1_All_Txns»
«Catg1_Payments»
«Catg2_Description»
«Catg2_Arrears»
«Catg2_Rates_Gross»
«Catg2_Rates_Less_Rebates
»
«Catg2_Rebates»
«Catg2_InterestCurrent»
«Catg2_InterestArrears»
«Catg2_Legal_FeesCurrent»
«Catg2_Legal_FeesArrears»
«Catg2_Discount»
«Catg2_All_Txns_Less_Rebs»
«Catg2_All_Txns»
«Catg2_Payments»
«Catg3_Description»
«Catg3_Arrears»
«Catg3_Rates_Gross»
«Catg3_Rates_Less_Rebates
»
«Catg3_Rebates»
«Catg3_InterestCurrent»
«Catg3_InterestArrears»
«Catg3_Legal_FeesCurrent»
«Catg3_Legal_FeesArrears»
«Catg3_Discount»
«Catg3_All_Txns_Less_Rebs»
«Catg3_All_Txns»
«Catg3_Payments»
«Catg4_Description»
«Catg4_Arrears»
«Catg4_Rates_Gross»
«Catg4_Rates_Less_Rebates
»
«Catg4_Rebates»
«Catg4_InterestCurrent»
«Catg4_InterestArrears»
«Catg4_Legal_FeesCurrent»
«Catg4_Legal_FeesArrears»
«Catg4_Discount»
«Catg4_All_Txns_Less_Rebs»

			«Catg4_All_Txns» «Catg4_Payments» «Catg5_Description» «Catg5_Arrears» «Catg5_Rates_Gross» «Catg5_Rates_Less_Rebates» «Catg5_Rebates» «Catg5_InterestCurrent» «Catg5_InterestArrears» «Catg5_Legal_FeesCurrent» «Catg5_Legal_FeesArrears» «Catg5_Discount» «Catg5_All_Txns_Less_Rebs» «Catg5_All_Txns» «Catg5_Payments» «Catg6_Description» «Catg6_Arrears» «Catg6_Rates_Gross» «Catg6_Rates_Less_Rebates» «Catg6_Rebates» «Catg6_InterestCurrent» «Catg6_InterestArrears» «Catg6_Legal_FeesCurrent» «Catg6_Legal_FeesArrears» «Catg6_Discount» «Catg6_All_Txns_Less_Rebs» «Catg6_All_Txns» «Catg6_Payments»	
ALLCONDS	All Property Conditions	Y	«Code» «Description» «Applied_Date» «Lapse_Date» «Document»	
ANIMALS	Maximum Animals that are allowed on the Property	Y	«Animal_Type» «Animal_Type_Description» «Maximum_Number_of_Animals»	
APLICTNS	Applications Against a Property	Y	«Applicant_Name» «Applicant_Address» «Application_Date» «Application_Expiry_Date» «Application_Number» «Application_Status» «Application_Type» «Lodgement_Date» «Description» «Decision_Date» «Decision_Number» «Decision_Type» «Application_Cond_Document»	COND (from Applications)
ASSM	Property Assessments	Y	«Ass_Assm_Check_Digit» «Ass_Admin» «Ass_AdminPending» «Ass_Assm_Location» «Ass_Deferred_RatesArr» «Ass_Deferred_RatesCur» «Ass_Discount_Date»	

«Ass_Instal_Int»
«Ass_Instal_IntPending»
«Ass_InterestPending»
«Ass_InterestPending_Date»
«Ass_Assm_Number»
«Ass_Assm_Status»
«Ass_Ass_Status_Date»
«Ass_OutstandingDeferred»
«Ass_VG_Number»
«Ass_VG_Tenancy_Number»
«Ass_Ratepayer_Name»
«Ass_Ratepayer_Address»
«Ass_Consumer_Name»
«Ass_Consumer_Address»
«Ass_Current_Period_Date»
«Ass_Last_End_Of_Pd_Date»
«Ass_Interest_Date»
«Ass_Pay_By_Date»
«Ass_Rates_Declared_Date»
«Ass_Arrears»
«Ass_Rates_Gross»
«Ass_Rates_Less_Rebates»
«Ass_Rates_Less_Discount»
«Ass_InterestArrears»
«Ass_InterestCurrent»
«Ass_All_Interest»
«Ass_Rebates»
«Ass_Legal_FeesCurrent»
«Ass_Legal_FeesArrears»
«Ass_Discount»
«Ass_DiscountPending»
«Ass_All_Txns_Less_Rebs»
«Ass_All_Txns»
«Ass_Payments»
«Ass_Balance»
«Ass_Overpayments»
«Ass_OutstandingInterest»
«Ass_OutstandingCurrent»
«Ass_OutstandingArrears»
«Ass_PostponedArrears»
«Ass_PostponedCurrent»
«Ass_PostponedInterest»
«Ass_RefundsSmall_Bal»
«Ass_DueBalance»
«Ass_RebatesPending»
«Ass_BalancePending»
«Ass_Valuation_Effect_Date»
«Ass_Rateable_Valuation»
«Ass_Valuation_Descr_1»
«Ass_Valuation_1»
«Ass_Valuation_Descr_2»
«Ass_Valuation_2»
«Ass_Valuation_Descr_3»
«Ass_Valuation_3»
«Ass_Valuation_Descr_4»
«Ass_Valuation_4»
«Ass_Valuation_Descr_5»
«Ass_Valuation_5»
«Ass_Valuation_Descr_6»
«Ass_Valuation_6»
«Ass_Valuation_Descr_7»
«Ass_Valuation_7»
«Ass_Valuation_Descr_8»

«Ass_Valuation_8»
«Ass_Valuation_Descr_9»
«Ass_Valuation_9»
«Ass_Valuation_Descr_10»
«Ass_Valuation_10»
«Catg1_Description»
«Catg1_Balance»
«Catg2_Balance»
«Catg3_Balance»
«Catg5_Balance»
«Catg6_Balance»
«Catg1_DiscountPending»
«Catg2_DiscountPending»
«Catg3_DiscountPending»
«Catg4_DiscountPending»
«Catg5_DiscountPending»
«Catg6_DiscountPending»
«Catg1_Instal_Int»
«Catg2_Instal_Int»
«Catg3_Instal_Int»
«Catg4_Instal_Int»
«Catg5_Instal_Int»
«Catg6_Instal_Int»
«Catg1_Rates_Less_Discount»
«Catg2_Rates_Less_Discount»
«Catg3_Rates_Less_Discount»
«Catg4_Rates_Less_Discount»
«Catg5_Rates_Less_Discount»
«Catg6_Rates_Less_Discount»
«Catg1_RebatesPending»
«Catg2_RebatesPending»
«Catg3_RebatesPending»
«Catg4_RebatesPending»
«Catg5_RebatesPending»
«Catg6_RebatesPending»
«Catg4_Balance»
«Catg1_Arrears»
«Catg1_Rates_Gross»
«Catg1_Rates_Less_Rebates»
«Catg1_Rebates»
«Catg1_InterestCurrent»
«Catg1_InterestArrears»
«Catg1_Legal_FeesCurrent»
«Catg1_Legal_FeesArrears»
«Catg1_Discount»
«Catg1_All_Txns_Less_Rebs»
«Catg1_All_Txns»
«Catg1_Payments»
«Catg2_Description»
«Catg2_Arrears»
«Catg2_Rates_Gross»
«Catg2_Rates_Less_Rebates»
«Catg2_Rebates»
«Catg2_InterestCurrent»
«Catg2_InterestArrears»

«Catg2_Legal_FeesCurrent»
«Catg2_Legal_FeesArrears»
«Catg2_Discount»
«Catg2_All_Txns_Less_Rebs»
«Catg2_All_Txns»
«Catg2_Payments»
«Catg3_Description»
«Catg3_Arrears»
«Catg3_Rates_Gross»
«Catg3_Rates_Less_Rebates
»
«Catg3_Rebates»
«Catg3_InterestCurrent»
«Catg3_InterestArrears»
«Catg3_Legal_FeesCurrent»
«Catg3_Legal_FeesArrears»
«Catg3_Discount»
«Catg3_All_Txns_Less_Rebs»
«Catg3_All_Txns»
«Catg3_Payments»
«Catg4_Description»
«Catg4_Arrears»
«Catg4_Rates_Gross»
«Catg4_Rates_Less_Rebates
»
«Catg4_Rebates»
«Catg4_InterestCurrent»
«Catg4_InterestArrears»
«Catg4_Legal_FeesCurrent»
«Catg4_Legal_FeesArrears»
«Catg4_Discount»
«Catg4_All_Txns_Less_Rebs»
«Catg4_All_Txns»
«Catg4_Payments»
«Catg5_Description»
«Catg5_Arrears»
«Catg5_Rates_Gross»
«Catg5_Rates_Less_Rebates
»
«Catg5_Rebates»
«Catg5_InterestCurrent»
«Catg5_InterestArrears»
«Catg5_Legal_FeesCurrent»
«Catg5_Legal_FeesArrears»
«Catg5_Discount»
«Catg5_All_Txns_Less_Rebs»
«Catg5_All_Txns»
«Catg5_Payments»
«Catg6_Description»
«Catg6_Arrears»
«Catg6_Rates_Gross»
«Catg6_Rates_Less_Rebates
»
«Catg6_Rebates»
«Catg6_InterestCurrent»
«Catg6_InterestArrears»
«Catg6_Legal_FeesCurrent»
«Catg6_Legal_FeesArrears»
«Catg6_Discount»
«Catg6_All_Txns_Less_Rebs»
«Catg6_All_Txns»
«Catg6_Payments»

CERT	Property Certificates	N	«Certificate_Code» «Certificate_Description» «Merge_Class» «Merge_Class_Description» «Reference_Number» «Reference_Date» «Lodgement_Date» «Issue_Date» «Expiry_Date» «Completion_Date» «Document_Fee» «Receipt_Number» «Receipt_Date» «Request_Status» «Addressee» «Numbering_Scheme_Code» «Numbering_Scheme_Desc» «Numbering_Scheme_Number » «Summary»
FLOOD	Property Flood Details	N	«Parcel_Description» «Flood_Area» «Reference» «Notify_Date» «Certification_Date» «Highest_Flood» «Highest_Flood_Year» «Hundered_Year_Flood» «Hundered_Year_Reference» «Twenty_Year_Flood» «Twenty_Year_Reference» «Map_Reference» «Flood_Way» «Determined» «Fill_Status» «Fill_Control»
LUSELIST	Property Land Use	Y	«Land_Use_Approved_Code» «Land_Use_Approved_Desc» «Land_Use_Actual_Code» «Land_Use_Actual_Desc» «Land_Use_Date_Approved» «Land_Use_Building_Level» «Land_Use_Percentage» «Land_Use_Approved_Doc» «Land_Use_Status» «Land_Use_Date_Actual» «Land_Use_Actual_Doc»
METERS (only to be used as an Associated Extract)	Meter Details for Property	N	«Assessment_Number» «Meter_ID» «Meter_Serial_ID» «Last_Billed_Date» «Last_Billed_Reading» «Meter_Unit_Type» «Meter_Allowance» «Charge_Rate» «Share_» «Remaining_Allowance» «Special_Read» «Special_Read_Date»

			«Last_Consumption»
NOTICE	Property Miscellaneous Notices	N	«Notice_Code» «Notice_Description» «Merge_Class» «Merge_Class_Description» «Lodgement_Date» «Issue_Date» «Expiry_Date» «Completion_Date» «Request_Status» «Reference_Number» «Reference_Date» «Document_Fee» «Receipt_Number» «Receipt_Date» «Addressee» «Numbering_Scheme_Code» «Numbering_Scheme_Desc» «Numbering_Scheme_Number» «Summary»
OCCNOM	Occupier Nominee	N	«Occupier_Nominee» «Occupier_Nominee_Address» «Occupier_Nominee_NameLink» «Reason_Code» «Reason_Code_Expiry_Date» «User_Defined_Code_1» «User_Defined_Value_1» «User_Defined_Code_2» «User_Defined_Value_2» «User_Defined_Code_3» «User_Defined_Value_3» «User_Defined_Code_4» «User_Defined_Value_4» «User_Defined_Code_5» «User_Defined_Value_5»
OCCUPIER	Property Occupiers	N	«Occupier_Name» «Occupier_Address» «Occupier_Address_1_Line» «Reason_Code» «Reason_Code_Expiry_Date» «User_Defined_Code_1» «User_Defined_Code_Value_1» «User_Defined_Code_2» «User_Defined_Code_Value_2» «User_Defined_Code_3» «User_Defined_Code_Value_3» «User_Defined_Code_4» «User_Defined_Code_Value_4» «User_Defined_Code_5» «User_Defined_Code_Value_5»
OWNERS	Property Owners	N	«Owner_Name»

			«Owner_Address» «Owner_Address_1_Line» «Reason_Code» «Reason_Code_Expiry_Date» «User_Defined_Code_1» «User_Defined_Value_1» «User_Defined_Code_2» «User_Defined_Value_2» «User_Defined_Code_3» «User_Defined_Value_3» «User_Defined_Code_4» «User_Defined_Value_4» «User_Defined_Code_5» «User_Defined_Value_5»	
PARCCOND (only to be used as an Associated Extract)	Property Parcel Conditions	Y	«Parcel_Description» «Parcel_Cond_Code» «Parcel_Cond_Description» «Parcel_Cond_Applied_Date» «Parcel_Cond_Lapse_Date» «Parcel_Cond_Document»	
PARCEL	Property Parcels	Y	«Plan_Type_Description» «Parcel_Description» «Parcel_Number» «Plan_Number» «Section» «Crown_Allotment» «Area» «Frontage» «Depth» «Setback» «Dimensions» «Parcel_Type_Description» «Parcel_Condition_Document»	PARCCOND
PARCLIST	Parcel List	Y	«Parcel_Description»	
PARCPLAN	Plans on a Parcel	Y	«Parc_Plan_Number» «Parc_Plan_Receive_Date» «Parc_Plan_Consent_Date» «Parc_Plan_Registered_Date» «Parc_Plan_External_Ref» «Parc_Plan_Subdivision» «Parc_Plan_Gazette_Date» «Parc_Plan_Gazette_Number» «Parc_Plan_Comments» «Parc_Plan_Response_Name» «Parc_Plan_Type_Prefix» «Parc_Plan_Type_Code» «Parc_Plan_Type_Descr» «Parc_Plan_Purpose_Code» «Parc_Plan_Purpose_Descr» «Parc_Plan_Amend_Date»	
PLANCOND	Conditions on a Plan	Y	«Plan_Cond_Descr» «Plan_Cond_Applied_Date» «Plan_Cond_Lapse_Date» «Plan_Cond_Doc»	
PLPACOND	Conditions on a	Y	«Parc_Plan_Cond_Descr»	

	Plan on a Parcel		«Parc_Plan_Cond_Appl_Date» «Parc_Plan_Cond_Lapse_Date» «Parc_Plan_Cond_Doc» «Parc_Document_TPK»	
PROPCOND	Property Conditions	Y	«Property_Cond_Code» «Property_Cond_Description» «Property_Cond_Apply_Date» «Property_Cond_Lapse_Date» «Property_Cond_Document»	
PROPPLAN	Plans on a Property	Y	«Plan_Type_Code» «Plan_Amend_Date» «Plan_Comments» «Plan_Consent_Date» «Plan_External_Ref» «Plan_Gazette_Date» «Plan_Gazette_Number» «Plan_Purpose_Code» «Plan_Purpose_Descr» «Plan_Receive_Date» «Plan_Registered_Date» «Plan_Response_Name» «Plan_Subdivision» «Plan_Type_Descr» «Plan_Type_Prefix»	
REFERENC	Property Reference Extract List	Y	«Reference_Type» «Reference_Description» «Reference_Number» «Status» «Status_Date»	Available to Customer Service (as Associated Extract to PROPERTY Extract Type)
SERVICES	Property Services	Y	«Service_Code» «Service_Description» «Service_Sub_Type_Code» «Service_Sub_Type_Descr» «Service_Frequency_Code» «Service_Frequency_Descr» «Collection_Day» «Collection_Time» «Service_Area_Code» «Service_Area_Descr» «Service_Reference» «Service_Collection_Sequ» «Service_Date_Requested» «Service_Date_Installed» «Service_Installed_Ref» «Service_Date_Removed» «Service_Removed_Ref» «Service_Removed_Code» «Service_Removed_Descr» «Service_Date_Missing» «Service_Number_Services» «Service_Comments» «Service_Status» «Delivery_Instruction_1» «Delivery_Instruction_2» «Delivery_Instruction_3» «Delivery_Instruction_4»	Available to Customer Service (as Associated Extract to PROPERTY Extract Type)

TITLCOND (only to be used as an Associated Extract)	Property Title Conditions	Y	«Title_Description» «Title_Cond_Code» «Title_Cond_Description» «Title_Cond_Applied_Date» «Title_Cond_Lapse_Date» «Title_Cond_Document»	
TITLE	Property Titles	Y	«Title_Description» «Volume» «Folio» «Title_Date_Approved» «Title_Conditions_Document»	TITLCOND
ZONELIST	Property Zones	Y	«Zone_Code» «Zone_Description» «Zone_Date_Effective» «Zone_Sub_Zone» «Zone_Percentage» «Zone_Status» «Zone_Plan_Type» «Zone_Plan_Number» «Zone_Plan_Description» «Zone_Plan_Gazette_Date» «Zone_Plan_Gazette_Number» «Zone_Plan_Council_Apprv» «Zone_Document» «Zone_Plan_Type1»	

Property - Extracts That Allow Associated Extracts

APLICTNS
ALLAPPL
ALLASSM
PARCEL
TITLE

Property - General Fields available from Merge Types

Note: The following fields will retrieve the *overriding mailing address* for the name receiving the document:

Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»

The following fields will source their formatting rules from the Name and Address Role Type CWP 1 (In Name and Address Parameters). The formatting for the Salutation field is determined by formatting rules that are defined at the system level. If there are multiple companies then the Name and Address System Default Mailing Salutation will be used. Where there is only one company then the Mailing Salutation for that company will be used:

Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»

General Fields

Affected Property	«Affected_Property»
Affected Property StAddr	«Affected_Property_StAddr»
Ass Admin	«Ass_Admin»
Ass AdminPending	«Ass_AdminPending»
Ass All Interest	«Ass_All_Interest»
Ass All Txns	«Ass_All_Txns»
Ass All Txns Less Rebs	«Ass_All_Txns_Less_Rebs»
Ass Arrears	«Ass_Arrears»
Ass Assm Check Digit	«Ass_Assm_Check_Digit»
Ass Assm Location	«Ass_Assm_Location»
Ass Assm Number	«Ass_Assm_Number»
Ass Assm Status	«Ass_Assm_Status»
Ass Assm Status Date	«Ass_Assm_Status_Date»
Ass Balance	«Ass_Balance»
Ass BalancePending	«Ass_BalancePending»
Ass Current Period Date	«Ass_Current_Period_Date»
Ass Deferred RatesArr	«Ass_Deferred_RatesArr»
Ass Deferred RatesCur	«Ass_Deferred_RatesCur»
Ass Discount	«Ass_Discount»
Ass DiscountPending	«Ass_DiscountPending»
Ass Discount Date	«Ass_Discount_Date»
Ass DueBalance	«Ass_DueBalance»
Ass Instal Int	«Ass_Instal_Int»
Ass Instal IntPending	«Ass_Instal_IntPending»
Ass InterestArrears	«Ass_InterestArrears»
Ass InterestCurrent	«Ass_InterestCurrent»
Ass InterestPending	«Ass_InterestPending»
Ass InterestPending Date	«Ass_InterestPending_Date»
Ass Interest Date	«Ass_Interest_Date»
Ass Last End Of Pd Date	«Ass_Last_End_Of_Pd_Date»
Ass Legal FeesArrears	«Ass_Legal_FeesArrears»
Ass Legal FeesCurrent	«Ass_Legal_FeesCurrent»
Ass OutstandingArrears	«Ass_OutstandingArrears»
Ass OutstandingCurrent	«Ass_OutstandingCurrent»
Ass OutstandingDeferred	«Ass_OutstandingDeferred»
Ass OutstandingInterest	«Ass_OutstandingInterest»
Ass Overpayments	«Ass_Overpayments»
Ass Pay By Date	«Ass_Pay_By_Date»
Ass Payments	«Ass_Payments»
Ass PostponedArrears	«Ass_PostponedArrears»
Ass PostponedCurrent	«Ass_PostponedCurrent»
Ass PostponedInterest	«Ass_PostponedInterest»

Ass Rateable Valuation	«Ass_Rateable_Valuation»
Ass Ratepayer Address	«Ass_Ratepayer_Address»
Ass Ratepayer Name	«Ass_Ratepayer_Name»
Ass Rates Declared Date	«Ass_Rates_Declared_Date»
Ass Rates Gross	«Ass_Rates_Gross»
Ass Rates Less Discount	«Ass_Rates_Less_Discount»
Ass Rates Less Rebates	«Ass_Rates_Less_Rebates»
Ass Rebates	«Ass_Rebates»
Ass RebatesPending	«Ass_RebatesPending»
Ass RefundsSmall Bal	«Ass_RefundsSmall_Bal»
Ass VG Number	«Ass_VG_Number»
Ass VG Tenancy Number	«Ass_VG_Tenancy_Number»
Ass Valuation 1	«Ass_Valuation_1»
Ass Valuation 10	«Ass_Valuation_10»
Ass Valuation 2	«Ass_Valuation_2»
Ass Valuation 3	«Ass_Valuation_3»
Ass Valuation 4	«Ass_Valuation_4»
Ass Valuation 5	«Ass_Valuation_5»
Ass Valuation 6	«Ass_Valuation_6»
Ass Valuation 7	«Ass_Valuation_7»
Ass Valuation 8	«Ass_Valuation_8»
Ass Valuation 9	«Ass_Valuation_9»
Ass Valuation Descr 1	«Ass_Valuation_Descr_1»
Ass Valuation Descr 10	«Ass_Valuation_Descr_10»
Ass Valuation Descr 2	«Ass_Valuation_Descr_2»
Ass Valuation Descr 3	«Ass_Valuation_Descr_3»
Ass Valuation Descr 4	«Ass_Valuation_Descr_4»
Ass Valuation Descr 5	«Ass_Valuation_Descr_5»
Ass Valuation Descr 6	«Ass_Valuation_Descr_6»
Ass Valuation Descr 7	«Ass_Valuation_Descr_7»
Ass Valuation Descr 8	«Ass_Valuation_Descr_8»
Ass Valuation Descr 9	«Ass_Valuation_Descr_9»
Ass Valuation Effect Date	«Ass_Valuation_Effect_Date»
Brought Forward	«Brought_Forward»
Carried Forward	«Carried_Forward»
Catg1 All Txns	«Catg1_All_Txns»
Catg1 All Txns Less Rebs	«Catg1_All_Txns_Less_Rebs»
Catg1 Arrears	«Catg1_Arrears»
Catg1 Balance	«Catg1_Balance»
Catg1 Description	«Catg1_Description»
Catg1 Discount	«Catg1_Discount»
Catg1 DiscountPending	«Catg1_DiscountPending»
Catg1 Instal Int	«Catg1_Instal_Int»
Catg1 InterestArrears	«Catg1_InterestArrears»
Catg1 InterestCurrent	«Catg1_InterestCurrent»
Catg1 Legal FeesArrears	«Catg1_Legal_FeesArrears»
Catg1 Legal FeesCurrent	«Catg1_Legal_FeesCurrent»
Catg1 Payments	«Catg1_Payments»
Catg1 Rates Gross	«Catg1_Rates_Gross»
Catg1 Rates Less Discount	«Catg1_Rates_Less_Discount»
Catg1 Rates Less Rebates	«Catg1_Rates_Less_Rebates»
Catg1 Rebates	«Catg1_Rebates»
Catg1 RebatesPending	«Catg1_RebatesPending»
Catg2 All Txns	«Catg2_All_Txns»
Catg2 All Txns Less Rebs	«Catg2_All_Txns_Less_Rebs»
Catg2 Arrears	«Catg2_Arrears»
Catg2 Balance	«Catg2_Balance»
Catg2 Description	«Catg2_Description»
Catg2 Discount	«Catg2_Discount»
Catg2 DiscountPending	«Catg2_DiscountPending»
Catg2 Instal Int	«Catg2_Instal_Int»
Catg2 InterestArrears	«Catg2_InterestArrears»
Catg2 InterestCurrent	«Catg2_InterestCurrent»

Catg2 Legal FeesArrears	«Catg2_Legal_FeesArrears»
Catg2 Legal Fees Current	«Catg2_Legal_Fees_Current»
Catg2 Payments	«Catg2_Payments»
Catg2 Rates Gross	«Catg2_Rates_Gross»
Catg2 Rates Less Discount	«Catg2_Rates_Less_Discount»
Catg2 Rates Less Rebates	«Catg2_Rates_Less_Rebates»
Catg2 Rebates	«Catg2_Rebates»
Catg2 RebatesPending	«Catg2_RebatesPending»
Catg3 All Txns	«Catg3_All_Txns»
Catg3 All Txns Less Rebs	«Catg3_All_Txns_Less_Rebs»
Catg3 Arrears	«Catg3_Arrears»
Catg3 Balance	«Catg3_Balance»
Catg3 Description	«Catg3_Description»
Catg3 Discount	«Catg3_Discount»
Catg3 DiscountPending	«Catg3_DiscountPending»
Catg3 Instal Int	«Catg3_Instal_Int»
Catg3 InterestArrears	«Catg3_InterestArrears»
Catg3 InterestCurrent	«Catg3_InterestCurrent»
Catg3 Legal FeesArrears	«Catg3_Legal_FeesArrears»
Catg3 Legal FeesCurrent	«Catg3_Legal_FeesCurrent»
Catg3 Payments	«Catg3_Payments»
Catg3 Rates Gross	«Catg3_Rates_Gross»
Catg3 Rates Less Discount	«Catg3_Rates_Less_Discount»
Catg3 Rates Less Rebates	«Catg3_Rates_Less_Rebates»
Catg3 Rebates	«Catg3_Rebates»
Catg3 RebatesPending	«Catg3_RebatesPending»
Catg4 All Txns	«Catg4_All_Txns»
Catg4 All Txns Less Rebs	«Catg4_All_Txns_Less_Rebs»
Catg4 Arrears	«Catg4_Arrears»
Catg4 Balance	«Catg4_Balance»
Catg4 Description	«Catg4_Description»
Catg4 Discount	«Catg4_Discount»
Catg4 DiscountPending	«Catg4_DiscountPending»
Catg4 Instal Int	«Catg4_Instal_Int»
Catg4 InterestArrears	«Catg4_InterestArrears»
Catg4 InterestCurrent	«Catg4_InterestCurrent»
Catg4 Legal FeesArrears	«Catg4_Legal_FeesArrears»
Catg4 Legal FeesCurrent	«Catg4_Legal_FeesCurrent»
Catg4 Payments	«Catg4_Payments»
Catg4 Rates Gross	«Catg4_Rates_Gross»
Catg4 Rates Less Discount	«Catg4_Rates_Less_Discount»
Catg4 Rates Less Rebates	«Catg4_Rates_Less_Rebates»
Catg4 Rebates	«Catg4_Rebates»
Catg4 RebatesPending	«Catg4_RebatesPending»
Catg5 All Txns	«Catg5_All_Txns»
Catg5 All Txns Less Rebs	«Catg5_All_Txns_Less_Rebs»
Catg5 Arrears	«Catg5_Arrears»
Catg5 Balance	«Catg5_Balance»
Catg5 Description	«Catg5_Description»
Catg5 Discount	«Catg5_Discount»
Catg5 DiscountPending	«Catg5_DiscountPending»
Catg5 Instal Int	«Catg5_Instal_Int»
Catg5 InterestArrears	«Catg5_InterestArrears»
Catg5 InterestCurrent	«Catg5_InterestCurrent»
Catg5 Legal FeesArrears	«Catg5_Legal_FeesArrears»
Catg5 Legal FeesCurrent	«Catg5_Legal_FeesCurrent»
Catg5 Payments	«Catg5_Payments»
Catg5 Rates Gross	«Catg5_Rates_Gross»
Catg5 Rates Less Discount	«Catg5_Rates_Less_Discount»
Catg5 Rates Less Rebates	«Catg5_Rates_Less_Rebates»
Catg5 Rebates	«Catg5_Rebates»
Catg5 RebatesPending	«Catg5_RebatesPending»
Catg6 All Txns	«Catg6_All_Txns»

Catg6 All Txns Less Rebs	«Catg6_All_Txns_Less_Rebs»
Catg6 Arrears	«Catg6_Arrears»
Catg6 Balance	«Catg6_Balance»
Catg6 Description	«Catg6_Description»
Catg6 Discount	«Catg6_Discount»
Catg6 DiscountPending	«Catg6_DiscountPending»
Catg6 Instal Int	«Catg6_Instal_Int»
Catg6 InterestArrears	«Catg6_InterestArrears»
Catg6 InterestCurrent	«Catg6_InterestCurrent»
Catg6 Legal FeesArrears	«Catg6_Legal_FeesArrears»
Catg6 Legal FeesCurrent	«Catg6_Legal_FeesCurrent»
Catg6 Payments	«Catg6_Payments»
Catg6 Rates Gross	«Catg6_Rates_Gross»
Catg6 Rates Less Discount	«Catg6_Rates_Less_Discount»
Catg6 Rates Less Rebates	«Catg6_Rates_Less_Rebates»
Catg6 Rebates	«Catg6_Rebates»
Catg6 RebatesPending	«Catg6_RebatesPending»
Crown Allotment	«Crown_Allotment»
Debt External	«Debt_External»
Debt Rates	«Debt_Rates»
Debt Special	«Debt_Special»
Debt Sundry	«Debt_Sundry»
Debt Total	«Debt_Total»
Debt Water	«Debt_Water»
Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»
Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»
Document Applicant Comm 1	«Document_Applicant_Comm_1»
Document Applicant Comm 2	«Document_Applicant_Comm_2»
Document Applicant Comm 3	«Document_Applicant_Comm_3»
Document Applicant Comm 4	«Document_Applicant_Comm_4»
Document Applicant Comm 5	«Document_Applicant_Comm_5»
Document Applicant Comm 6	«Document_Applicant_Comm_6»
Document Applicant Comm D	«Document_Applicant_Comm_D»
Document Applicant Info 1	«Document_Applicant_Info_1»
Document Applicant Info 2	«Document_Applicant_Info_2»
Document Applicant Info 3	«Document_Applicant_Info_3»
Document Applicant Info 4	«Document_Applicant_Info_4»
Document Applicant Info 5	«Document_Applicant_Info_5»
Document Applicant Info 6	«Document_Applicant_Info_6»
Document Applicant Info D	«Document_Applicant_Info_D»
Document Applicant Name	«Document_Applicant_Name»
Document Completion Date	«Document_Completion_Date»
Document Deflt Comm Descr	«Document_Deflt_Comm_Descr»
Document Deflt Info Descr	«Document_Deflt_Info_Descr»
Document Expiry Date	«Document_Expiry_Date»
Document Fee Amount	«Document_Fee_Amount»
Document Issue Date	«Document_Issue_Date»
Document Lodgement Date	«Document_Lodgement_Date»
Document Name	«Document_Name»
Document Number	«Document_Number»
Document Path	«Document_Path»
Document Receipt Date	«Document_Receipt_Date»
Document Receipt Number	«Document_Receipt_Number»
Document Reference Date	«Document_Reference_Date»
Document Reference Number	«Document_Reference_Number»
Document Status	«Document_Status»
Document User Id	«Document_User_Id»
Document User Name	«Document_User_Name»
Document User Signature	«Document_User_Signature»
End House Number	«End_House_Number»
End House Suffix	«End_House_Suffix»

End Level Number	«End_Level_Number»
End Level Suffix	«End_Level_Suffix»
End Unit Number	«End_Unit_Number»
End Unit Suffix	«End_Unit_Suffix»
House Number	«House_Number»
Map Reference	«Map_Reference»
Merge Class Code	«Merge_Class_Code»
Merge Class Description	«Merge_Class_Description»
Merge Type Code	«Merge_Type_Code»
Merge Type Description	«Merge_Type_Description»
Merge Type Name	«Merge_Type_Name»
Merge Type Path	«Merge_Type_Path»
Parc Document TPK	«Parc_Document_TPK»
Parc Plan Amend Date	«Parc_Plan_Amend_Date»
Parc Plan Comments	«Parc_Plan_Comments»
Parc Plan Cond Appl Date	«Parc_Plan_Cond_Appl_Date»
Parc Plan Cond Code	«Parc_Plan_Cond_Code»
Parc Plan Cond Descr	«Parc_Plan_Cond_Descr»
Parc Plan Cond Doc	«Parc_Plan_Cond_Doc»
Parc Plan Cond Lapse Date	«Parc_Plan_Cond_Lapse_Date»
Parc Plan Consent Date	«Parc_Plan_Consent_Date»
Parc Plan External Ref	«Parc_Plan_External_Ref»
Parc Plan Gazette Date	«Parc_Plan_Gazette_Date»
Parc Plan Gazette Number	«Parc_Plan_Gazette_Number»
Parc Plan Number	«Parc_Plan_Number»
Parc Plan Purpose Code	«Parc_Plan_Purpose_Code»
Parc Plan Purpose Descr	«Parc_Plan_Purpose_Descr»
Parc Plan Receive Date	«Parc_Plan_Receive_Date»
Parc Plan Registered Date	«Parc_Plan_Registered_Date»
Parc Plan Response Name	«Parc_Plan_Response_Name»
Parc Plan Subdivision	«Parc_Plan_Subdivision»
Parc Plan Type Code	«Parc_Plan_Type_Code»
Parc Plan Type Descr	«Parc_Plan_Type_Descr»
Parc Plan Type Prefix	«Parc_Plan_Type_Prefix»
Plan Amend Date	«Plan_Amend_Date»
Plan Comments	«Plan_Comments»
Plan Cond Applied Date	«Plan_Cond_Applied_Date»
Plan Cond Code	«Plan_Cond_Code»
Plan Cond Descr	«Plan_Cond_Descr»
Plan Cond Doc	«Plan_Cond_Doc»
Plan Cond Lapse Date	«Plan_Cond_Lapse_Date»
Plan Consent Date	«Plan_Consent_Date»
Plan External Ref	«Plan_External_Ref»
Plan Gazette Date	«Plan_Gazette_Date»
Plan Gazette Number	«Plan_Gazette_Number»
Plan Number	«Plan_Number»
Plan Purpose Code	«Plan_Purpose_Code»
Plan Purpose Descr	«Plan_Purpose_Descr»
Plan Receive Date	«Plan_Receive_Date»
Plan Registered Date	«Plan_Registered_Date»
Plan Response Name	«Plan_Response_Name»
Plan Subdivision	«Plan_Subdivision»
Plan Type Code	«Plan_Type_Code»
Plan Type Descr	«Plan_Type_Descr»
Plan Type Prefix	«Plan_Type_Prefix»
Property Address	«Property_Address»
Property Address 1 Line	«Property_Address_1_Line»
Property Alternate Addr	«Property_Alternate_Addr»
Property Area	«Property_Area»
Property Description	«Property_Description»
Property Dimensions	«Property_Dimensions»
Property Name	«Property_Name»
Property Owners	«Property_Owners»

Property Owners Address	«Property_Owners_Address»
Property Street Class	«Property_Street_Class»
Property Titles	«Property_Titles»
Property Type	«Property_Type»
Property Ward	«Property_Ward»
Property Zones	«Property_Zones»
Start House Number	«Start_House_Number»
Start House Suffix	«Start_House_Suffix»
Start Level Number	«Start_Level_Number»
Start Level Suffix	«Start_Level_Suffix»
Start Unit Number	«Start_Unit_Number»
Start Unit Suffix	«Start_Unit_Suffix»
Street Class	«Street_Class»
Street Name	«Street_Name»
Suburb Name	«Suburb_Name»
Total Balance	«Total_Balance»
Trading Name	«Trading_Name»

Animals - Extracts and Extracts with Filters

EXTRACT	DESCRIPTION	FILTER AVAILABLE	AVAILABLE FIELDS
ANMLLOCN	Animal Locations	N	«Property_Address» «Property_Ward»
OWNANML	Finds all the animals owned by the same owner	N	«Animal_Name» «Animal_Reference» «Animal_Type» «Animal_Breed» «Animal_Gender» «Animal_Class» «Animal_Status» «Animal_Colour»
ANMLQUES	Questions and Answers	Y	«Questionnaire_Code» «Questionnaire_Descr» «Question_Number» «Question_Text» «Answer_Text» «Last_Answer_Mod_User» «Last_Answer_Mod_Date»
ANML_ATT	Animal Attachments	Y	«Attachment_File» «Attachment_Description»

Animals - General Fields available through Merge Types

Note: The following fields will retrieve the *overriding mailing address* for the name receiving the document:

Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»

The following fields will source their formatting rules from the Name and Address Role Type CWP 1 (In Name and Address Parameters). The formatting for the Salutation field is determined by formatting rules that are defined at the system level. If there are multiple companies then the Name and Address System Default Mailing Salutation will be used. Where there is only one company then the Mailing Salutation for that company will be used:

Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»

General Fields

Affected Property	«Affected_Property»
Animal Age Months	«Animal_Age_Months»
Animal Age Years	«Animal_Age_Years»
Animal Birth Date	«Animal_Birth_Date»
Animal Breed	«Animal_Breed»
Animal Class	«Animal_Class»
Animal Colour	«Animal_Colour»
Animal Gender	«Animal_Gender»
Animal Name	«Animal_Name»
Animal Particular	«Animal_Particular»
Animal Physical ID	«Animal_Physical_ID»
Animal Reference	«Animal_Reference»
Animal Rego Disc	«Animal_Rego_Disc»
Animal Rego Expiry Date	«Animal_Rego_Expiry_Date»
Animal Status	«Animal_Status»
Animal Type	«Animal_Type»
Brought Forward	«Brought_Forward»
Carried Forward	«Carried_Forward»
Document Applicant Addr M	«Document_Applicant_Addr_M»
Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»
Document Applicant Addres	«Document_Applicant_Addres»
Document Applicant Comm 1	«Document_Applicant_Comm_1»
Document Applicant Comm 2	«Document_Applicant_Comm_2»
Document Applicant Comm 3	«Document_Applicant_Comm_3»
Document Applicant Comm 4	«Document_Applicant_Comm_4»
Document Applicant Comm 5	«Document_Applicant_Comm_5»
Document Applicant Comm 6	«Document_Applicant_Comm_6»
Document Applicant Comm D	«Document_Applicant_Comm_D»
Document Applicant Info 1	«Document_Applicant_Info_1»
Document Applicant Info 2	«Document_Applicant_Info_2»
Document Applicant Info 3	«Document_Applicant_Info_3»
Document Applicant Info 4	«Document_Applicant_Info_4»
Document Applicant Info 5	«Document_Applicant_Info_5»
Document Applicant Info 6	«Document_Applicant_Info_6»
Document Applicant Info D	«Document_Applicant_Infor_D»
Document Applicant Name	«Document_Applicant_Name»
Document Completion Date	«Document_Completion_Date»
Document Deflt Comm Descr	«Document_Deflt_Comm_Descr»
Document Deflt Info Descr	«Document_Deflt_Info_Descr»
Document Expiry Date	«Document_Expiry_Date»
Document Fee Amount	«Document_Fee_Amount»

Document Issue Date	«Document_Issue_Date»
Document Lodgement Date	«Document_Lodgement_Date»
Document Name	«Document_Name»
Document Number	«Document_Number»
Document Path	«Document_Path»
Document Receipt Date	«Document_Receipt_Date»
Document Receipt Number	«Document_Receipt_Number»
Document Reference Date	«Document_Reference_Date»
Document Reference Number	«Document_Reference_Number»
Document Status	«Document_Status»
Document User Id	«Document_User_Id»
Document User Name	«Document_User_Name»
Document User Signature	«Document_User_Signature»
Merge Class Code	«Merge_Class_Code»
Merge Class Description	«Merge_Class_Description»
Merge Type Code	«Merge_Type_Code»
Merge Type Description	«Merge_Type_Description»
Merge Type Name	«Merge_Type_Name»
Merge Type Path	«Merge_Type_Path»

Infringements - Extracts and Extracts with Filters

EXTRACT	DESCRIPTION	FILTER AVAILABLE	AVAILABLE FIELDS
OFNCDETS	Offence Details – NO Primary Offence	N	«Additional_Fees» «Contact_Formatted» «Expiation_Fee» «Inspector_Code» «Inspector_Code_Descr» «Late_Fee» «Next_Action_Date» «Offence_Additional_Text» «Offence_Balance» «Offence_Date» «Offence_Description» «Offence_Location» «Offence_Time» «Pay_By_Date» «Registration_Formatted» «Ticket_Number» «Case_Record_Number»
ENFCERT	Enforcement Certificate (WA specific)	N	«Offender_Name» «Birth_Date» «Infringement_Number» «Offence_Date» «Issue_Date» «Offence_Code» «Final_Demand_Date» «Penalty_Amount»
LIFFEES	List of Fees for an Offence	N	«Fee_Type» «Fee_Type_Description» «Total_Amount» «Total_Tax»
LIFREFERENCE	Infringement Reference Extract List	Y	«Reference_Type» «Reference_Description » «Reference_Number» «Status» «Status_Date»
IPINSTDETS	Instalment Plan Instalment Details (only available within Instalment Plan Parameters)	N	«Date_Due» «Instalment_Amount» «Date_Received» «Amount_Received»
IPOFNCDETS	Instalment Plan Offence Details (only available within Instalment Plan Parameters)	Y	«Ticket_Number» «Offence_Balance» «Offence_Description» «Offence_Date»
SELLIST	Selection List	N	«Ticket_Number» «Registration_Number» «Offence_Date» «Offence_Time» «Inspector_Code» «Offence_Description» «Additional_Text»

«Legal_Text»
«Expiation_Fee»
«Late_Fee»
«Additional_Fees»
«Payments_Received»
«Offence_Balance»
«Offence_Location»

NOTE: - the SELLIST extract is to be used from the Print List Function on the Infringement Selection Form, however, the only General Merge Fields that can be set-up in conjunction with this Extract are the fields that commence with 'List*'.

Infringements - General Fields available through Merge Types

Note: The following fields will retrieve the *overriding mailing address* for the name receiving the document:

Contact Formatted	«Contact_Formatted»
Contact Address Suburb	«Contact_Address_Suburb»
Contact Address Line 1	«Contact_Address_Line_1»
Contact Address Line 1	«Contact_Address_Line_1»
Contact Address Line 1	«Contact_Address_Line_1»
Contact Address Line 1	«Contact_Address_Line_1»
Contact Address	«Contact_Address»

The following fields will source their formatting rules from the Name and Address Role Type CWP 1 (In Name and Address Parameters). The formatting for the Salutation field is determined by formatting rules that are defined at the system level. If there are multiple companies then the Name and Address System Default Mailing Salutation will be used. Where there is only one company then the Mailing Salutation for that company will be used:

Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»

General Fields

Additional Fees	«Additional_Fees»
Additional Fees Tax	«Additional_Fees_Tax»
Additional Location	«Additional_Location»
Affected Property	«Affected_Property»
Allocated Date	«Allocated_Date»
Animal Breed	«Animal_Breed»
Animal Colour	«Animal_Colour»
Animal Gender	«Animal_Gender»
Animal Owner	«Animal_Owner»
Animal Particulars	«Animal_Particulars»
Animal Physical Id	«Animal_Physical_Id»
Animal Reference	«Animal_Reference»
Animal Regn Number	«Animal_Regn_Number»
Animal Regn Period	«Animal_Regn_Period»
Animal Regn State	«Animal_Regn_State»
Animal Type	«Animal_Type»
Applicant	«Applicant»
Application Number	«Application_Number»
Application Particulars	«Application_Particulars»
Area Markings Code	«Area_Markings_Code»
Area Markings Descr	«Area_Markings_Descr»
Between Street One	«Between_Street_One»
Between Street Two	«Between_Street_Two»
Brought Forward	«Brought_Forward»
Carried Forward	«Carried_Forward»
Case Record Number	«Case_Record_Number»
Chalk Mark Code	«Chalk_Mark_Code»
Chalk Mark Descr	«Chalk_Mark_Descr»
Comments	«Comments»
Contact Address	«Contact_Address»
Contact Address Line 1	«Contact_Address_Line_1»
Contact Address Line 2	«Contact_Address_Line_2»
Contact Address Line 3	«Contact_Address_Line_3»
Contact Address Line 4	«Contact_Address_Line_4»
Contact Address Suburb	«Contact_Address_Suburb»

Contact Birth Date	«Contact_Birth_Date»
Contact Drivers Licence	«Contact_Driver_Licence»
Contact Formatted	«Contact_Formatted»
Contact Gender Code	«Contact_Gender_Code»
Contact Gender Descr	«Contact_Gender_Descr»
Contact Given Names	«Contact_Given_Names»
Contact Name	«Contact_Name»
Contact Postcode	«Contact_Postcode»
Contact Salutation	«Contact_Salutation»
Contact Surname	«Contact_Surname»
Council Code	«Council_Code»
Council Code Description	«Council_Code_Description»
Court Address	«Court_Address»
Court Area Code	«Court_Area_Code»
Court Area Descr	«Court_Area_Descr»
Court Batch Number	«Court_Batch_Number»
Court Tracking Number	«Court_Tracking_Number»
Court X Reference	«Court_X_Reference»
Defendant Notice Date	«Defendant_Notice_Date»
Direct Prosecution	«Direct_Prosecution»
Discount Available	«Discount_Available»
Discount Date	«Discount_Date»
Distance Front	«Distance_Front»
Distance Rear	«Distance_Rear»
Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»
Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»
Document Applicant Comm 1	«Document_Applicant_Comm_1»
Document Applicant Comm 2	«Document_Applicant_Comm_2»
Document Applicant Comm 3	«Document_Applicant_Comm_3»
Document Applicant Comm 4	«Document_Applicant_Comm_4»
Document Applicant Comm 5	«Document_Applicant_Comm_5»
Document Applicant Comm 6	«Document_Applicant_Comm_6»
Document Applicant Comm D	«Document_Applicant_Comm_D»
Document Applicant Info 1	«Document_Applicant_Info_1»
Document Applicant Info 2	«Document_Applicant_Info_2»
Document Applicant Info 3	«Document_Applicant_Info_3»
Document Applicant Info 4	«Document_Applicant_Info_4»
Document Applicant Info 5	«Document_Applicant_Info_5»
Document Applicant Info 6	«Document_Applicant_Info_6»
Document Applicant Info D	«Document_Applicant_Info_D»
Document Applicant Name	«Document_Applicant_Name»
Document Completion Date	«Document_Completion_Date»
Document Deflt Comm Descr	«Document_Deflt_Comm_Descr»
Document Deflt Info Descr	«Document_Deflt_Info_Descr»
Document Expiry Date	«Document_Expiry_Date»
Document Fee Amount	«Document_Fee_Amount»
Document Issue Date	«Document_Issue_Date»
Document Lodgement Date	«Document_Lodgement_Date»
Document Name	«Document_Name»
Document Number	«Document_Number»
Document Path	«Document_Path»
Document Receipt Date	«Document_Receipt_Date»
Document Receipt Number	«Document_Receipt_Number»
Document Reference Date	«Document_Reference_Date»
Document Reference Number	«Document_Reference_Number»
Document Status	«Document_Status»
Document User Id	«Document_User_Id»
Document User Name	«Document_User_Name»
Document User Signature	«Document_User_Signature»
End Time	«End_Time»
Exemption Code	«Exemption_Code»

Exemption Date	«Exemption_Date»
Exemption Descr	«Exemption_Descr»
Expiation Fee	«Expiation_Fee»
Expiation Fee Balance	«Expiation_Fee_Balance»
Expiation Fee Tax	«Expiation_Fee_Tax»
Extended Location	«Extended_Location»
Fitness Warrant Expiry	«Fitness_Warrant_Expiry»
Fitness Warrant Number	«Fitness_Warrant_Number»
HH Notes1	«HH_Notes1»
HH Notes2	«HH_Notes2»
HH Notes3	«HH_Notes3»
HH Pay By Date	«HH_Pay_By_Date»
HH Review Notes1	«HH_Review_Notes1»
HH Review Notes2	«HH_Review_Notes2»
HH Review Time	«HH_Review_Time»
Hearing Day Name	«Hearing_Day_Name»
Hearing Day Ord Alpha	«Hearing_Day_Ord_Alpha»
Hearing Day Ord Num	«Hearing_Day_Ord_Num»
Hearing Month Name	«Hearing_Month_Name»
Hearing Year	«Hearing_Year»
How Parked Code	«How_Parked_Code»
How Parked Descr	«How_Parked_Descr»
Infringement Comments	«Infringement_Comments»
Infringement Type	«Infringement_Type»
Infringement Type Descr	«Infringement_Type_Descr»
Inspector Code	«Inspector_Code»
Inspector Code Descr	«Inspector_Code_Descr»
Intersection	«Intersection»
Issue Date	«Issue_Date»
Issue Time	«Issue_Time»
Label Expiry Date	«Label_Expiry_Date»
Label Number	«Label_Number»
Label Readable	«Label_Readable»
Label Registration Number	«Label_Registration_Number»
Late Fee	«Late_Fee»
Late Fee Date	«Late_Fee_Date»
Late Fee Tax	«Late_Fee_Tax»
Length Of Vehicle	«Length_Of_Vehicle»
Licence Expiry	«Licence_Expiry»
Licence Number	«Licence_Number»
Licence Particulars	«Licence_Particulars»
Licence Trading Name	«Licence_Trading_Name»
Licencee	«Licencee»
List Last Update Date	«List_Last_Update_Date»
List Pay by Date	«List_Pay_by_Date»
List Total Add Fees	«List_Total_Add_Fees»
List Total Balance	«List_Total_Balance»
List Total Expiation	«List_Total_Expiation»
List Total Late Fee	«List_Total_Late_Fee»
List Total Payments Rcvd	«List_Total_Payments_Rcvd»
Location Id Location	«Location_Id_Location»
Location Id Location Code	«Location_Id_Location_Code»
Location Id Max Time	«Location_Id_Max_Time»
Location Id Number	«Location_Id_Number»
Location Id Street Side	«Location_Id_Street_Side»
Merge Class Code	«Merge_Class_Code»
Merge Class Description	«Merge_Class_Description»
Merge Type Code	«Merge_Type_Code»
Merge Type Description	«Merge_Type_Description»
Merge Type Name	«Merge_Type_Name»
Merge Type Path	«Merge_Type_Path»
Meter Entry Time	«Meter_Entry_Time»
Meter Expiry Time	«Meter_Expiry_Time»

Meter Fee Paid	«Meter_Fee_Paid»
Meter Number	«Meter_Number»
Meter Spaces From	«Meter_Spaces_From»
Meter Time On	«Meter_Time_On»
Next Action Date	«Next_Action_Date»
Notification Code	«Notification_Code»
Notification Code Descr	«Notification_Code_Descr»
Offence Additional Text	«Offence_Additional_Text»
Offence Balance	«Offence_Balance»
Offence Balance Tax	«Offence_Balance_Tax»
Offence Code	«Offence_Code»
Offence Date	«Offence_Date»
Offence Day Name	«Offence_Day_Name»
Offence Day Ord Alpha	«Offence_Day_Ord_Alpha»
Offence Day Ord Num	«Offence_Day_Ord_Num»
Offence Description	«Offence_Description»
Offence Legal Text	«Offence_Legal_Text»
Offence Location	«Offence_Location»
Offence Month Name	«Offence_Month_Name»
Offence Street	«Offence_Street»
Offence Suburb	«Offence_Suburb»
Offence Time	«Offence_Time»
Offence Time 12hr	«Offence_Time_12hr»
Offence Year	«Offence_Year»
Pay By Date	«Pay_By_Date»
Payments Received	«Payments_Received»
Payments Received Tax	«Payments_Received_Tax»
Percent In Area	«Percent_In_Area»
Plate Type Code	«Plate_Type_Code»
Plate Type Description	«Plate_Type_Description»
Post Out	«Post_Out»
Reference One	«Reference_One»
Registration Check Digit	«Registration_Check_Digit»
Registration Formatted	«Registration_Formatted»
Registration Number	«Registration_Number»
Reminder Pay By Date	«Reminder_Pay_By_Date»
Reminder Service Date	«Reminder_Service_Date»
Reminder Service Type	«Reminder_Service_Type»
Replacement Ticket Number	«Replacement_Ticket_Number»
SA Court Reference	«SA_Court_Reference»
Side Street Code	«Side_Street_Code»
Side Street Descr	«Side_Street_Descr»
Sign Formatted	«Sign_Formatted»
Sign Number	«Sign_Number»
Start Plus Max Time	«Start_Plus_Max_Time»
Start Time	«Start_Time»
State Code	«State_Code»
State Description	«State_Description»
Status Code	«Status_Code»
Status Code Description	«Status_Code_Description»
Ticket Number	«Ticket_Number»
Tow Called Time	«Tow_Called_Time»
Tow Company	«Tow_Company»
Tow Lifted Time	«Tow_Lifted_Time»
Tow Reason	«Tow_Reason»
Tow Type	«Tow_Type»
Tow Yard Location	«Tow_Yard_Location»
Towage Amount	«Towage_Amount»
Traffic Conditions Code	«Traffic_Conditions_Code»
Traffic Conditions Descr	«Traffic_Conditions_Descr»
Type of Case	«Type_of_Case»
Vehicle Colour Code	«Vehicle_Colour_Code»
Vehicle Colour Descr	«Vehicle_Colour_Descr»

Vehicle Make Code	«Vehicle_Make_Code»
Vehicle Make Descr	«Vehicle_Make_Descr»
Vehicle Type Code	«Vehicle_Type_Code»
Vehicle Type Descr	«Vehicle_Type_Descr»
WA Court Reference	«WA_Court_Reference»

The following fields are only available via the Instalment Plan Parameters.

Date Instalment Plan was cancelled	«IP_Cancel_Date»
Date the Concession Card Expires	«IP_Card_Expiry»
Name of Holder on Consession Card	«IP_Card_Holder»
Number of Concession Card	«IP_Card_Number»
Instalment Plan Category	«IP_Category»
Formatted Name & Address of Instalment Current Contact	«IP_Contact_Formatted»
Name of Instalment Current Contact	«IP_Contact_Name»
Number of Days Payment was extended	«IP_Days_Extended»
Date Instalment Plan was Defaulted	«IP_Default_Date»
Starting Date of Plan's Duration	«IP_Duration_From»
Ending Date of Plan's Duration	«IP_Duration_To»
Specifies whether Supporting Evidence Required	«IP_Evidence_Required»
Date Supporting Evidence was sighted	«IP_Evidence_Sighted»
Date that Payment was Extended From	«IP_Extended_From»
Date that Payment was Extended To	«IP_Extended_To»
Date that First Payment was Due	«IP_First_Payment_Due»
Number of Instalments scheduled	«IP_No_of_Instalments»
The Amount of each Periodic Payment	«IP_Payment_Amount»
Frequency of each Periodic Payment	«IP_Payment_Frequency»
Instalment Plan's Number	«IP_Plan_Number»
Instalment Plan's Status	«IP_Status»
Instalment Plan's Type	«IP_Type»

Customer Service - Extracts and Extracts with Filters

EXTRACT	DESCRIPTION	FILTER AVAILABLE	AVAILABLE FIELDS	ASSOC EXTRACT
ANIMALS	Animals Against Customer Requests	N	«Animal_Reference» «Animal_Name» «Animal_Type_Code» «Animal_Type_Description» «Animal_Breed_Code» «Animal_Breed_Description» «Animal_Colour_Code» «Animal_Colour_Description» «Animal_Gender» «Formatted_Name» «Formatted_Address» «Owners_Mail_Addr»	
APPL	Applications Against Customer Requests	N	«Application_Number» «Application_Description» «Application_Type_Code» «Application_Type_Descr» «Formatted_Address»	
INFRINGE	Infringements Relating to a Request	N	«Formatted_Ticket_Number» «Offence_Date» «Ticket_Balance» «Infringement_Type_Code» «Infringement_Type_Descr» «Offence_Type_Code» «Offence_Type_Descr»	
LICENCE	Licensing on a Customer Request	N	«Licence_Number» «Formatted_Address» «Licence_Description» «Licence_Type_Code» «Licence_Type_Description»	
NAMES	Name List	N	«Name» «Mailing_Address»	
NOTES	Request Notes	N	«Officer_Code» «Officer_Descr» «Date_and_Time» «Not_Type» «Note_Type_Descr» «Security_Level» «Note»	
PROPERTY	Properties attached to a Request	Y	«Owner» «Owner_Address» «Owner_Address_M» «Address» «Address_Single_Line» «Property_Key» «Property_Street_Class»	REFERENC SERVICES (from Property module)
QUESANS W	Questions and Answers	N	«Questionnaire_Code» «Questionnaire_Descr» «Question_Number» «Question_Text»	

			«Answer_Text» «Last_Answer_Mod_Date» «Last_Answer_Mod_User
RATES	Rates Assessment	N	«Formatted_Address» «Assessment_Number» «Check_Digit» «Legal_Description» «Rates_References»
REFERENC	Reference Extract List	Y	«Reference_Type» «Reference_Description» «Reference_Number» «Status» «Status_Date»
REQU_HIST	Request History	N	«Date_Time» «User_ID» «Node_ID» «Form_ID» «Action» «Data_Code» «Data_Code_Descr» «Log_Detail»
STRTSUBR	Street Suburb Linked to a Customer Request	N	«Street» «Suburb» «State» «Postcode» «Street_Class»
WARD	Ward linked to a Customer Request	N	«Ward»

Customer Service - General Fields Available through Merge Types

Note: The following fields will retrieve the *overriding mailing address* for the name receiving the document:

Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»

The following fields will source their formatting rules from the Name and Address Role Type CWP 1 (In Name and Address Parameters). The formatting for the Salutation field is determined by formatting rules that are defined at the system level. If there are multiple companies then the Name and Address System Default Mailing Salutation will be used. Where there is only one company then the Mailing Salutation for that company will be used:

Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»

General Fields

Affected Property	«Affected_Property»
Brought Forward	«Brought_Forward»
Carried Forward	«Carried_Forward»
Contact Type Code	«Contact_Type_Code»
Contact Type Descr	«Contact_Type_Descr»
Date Received	«Date_Received»
Date Responded	«Date_Responded»
Date Responded By	«Date_Responded_By»
Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»
Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»
Document Applicant Comm 1	«Document_Applicant_Comm_1»
Document Applicant Comm 2	«Document_Applicant_Comm_2»
Document Applicant Comm 3	«Document_Applicant_Comm_3»
Document Applicant Comm 4	«Document_Applicant_Comm_4»
Document Applicant Comm 5	«Document_Applicant_Comm_5»
Document Applicant Comm 6	«Document_Applicant_Comm_6»
Document Applicant Comm D	«Document_Applicant_Comm_D»
Document Appl DPBARCODE	«Document_Appl_DPBARCODE»
Document Applicant DPID	«Document_Applicant_DPID»
Document Applicant Info 1	«Document_Applicant_Info_1»
Document Applicant Info 2	«Document_Applicant_Info_2»
Document Applicant Info 3	«Document_Applicant_Info_3»
Document Applicant Info 4	«Document_Applicant_Info_4»
Document Applicant Info 5	«Document_Applicant_Info_5»
Document Applicant Info 6	«Document_Applicant_Info_6»
Document Applicant Info D	«Document_Applicant_Info_D»
Document Applicant Name	«Document_Applicant_Name»
Document Completion Date	«Document_Completion_Date»
Document Deflt Comm Descr	«Document_Deflt_Comm_Descr»
Document Deflt Info Descr	«Document_Deflt_Info_Descr»
Document Expiry Date	«Document_Expiry_Date»
Document Fee Amount	«Document_Fee_Amount»
Document Issue Date	«Document_Issue_Date»
Document Lodgement Date	«Document_Lodgement_Date»
Document Name	«Document_Name»
Document Number	«Document_Number»
Document Path	«Document_Path»
Document Receipt Date	«Document_Receipt_Date»

Document Receipt Number	«Document_Receipt_Number»
Document Reference Date	«Document_Reference_Date»
Document Reference Number	«Document_Reference_Number»
Document Status	«Document_Status»
Document User Id	«Document_User_Id»
Document User Name	«Document_User_Name»
Document User Signature	«Document_User_Signature»
Merge Class Code	«Merge_Class_Code»
Merge Class Description	«Merge_Class_Description»
Merge Type Code	«Merge_Type_Code»
Merge Type Description	«Merge_Type_Description»
Merge Type Name	«Merge_Type_Name»
Merge Type Path	«Merge_Type_Path»
Priority	«Priority»
Receiving Officer Code	«Receiving_Officer_Code»
Receiving Officer Descr	«Receiving_Officer_Descr»
Request Number	«Request_Number»
Request Status	«Request_Status»
Request Status Code	«Request_Status_Code»
Request Type Code	«Request_Type_Code»
Request Type Descr	«Request_Type_Descr»
Requestor Type Code	«Requestor_Type_Code»
Requestor Type Descr	«Requestor_Type_Descr»
Responsible Officer Code	«Responsible_Officer_Code»
Responsible Officer Descr	«Responsible_Officer_Descr»
Time Received	«Time_Received»
Time Responded	«Time_Responded»
Time Responded By	«Time_Responded_By»
Time Taken Number	«Time_Taken_Number»
Time Taken Units	«Time_Taken_Units»

Bookings Management- Extracts and Extracts with Filters

EXTRACT	DESCRIPTION	FILTER AVAILABLE	AVAILABLE FIELDS	ASSOC EXTRACT
ACTPCONDS	Activity Type Conditions	Y	«Condition_Code» «Condition_Descr» «Condition_Type_Descr» «Condition_Apply_Date» «Condition_Lapse_Date» «Condition_Document» «Condition_Comments»	
ALLCLIPS	All Attachments Against a Booking		«Booking_Attachments» «Facility_Attachments»	
ALLCONDS	All Conditions against a Booking		«Booking_Conditions» «Activity_Type_Conditions» «Facility_Conditions»	ACTYPCON BOOKCOND FACLCOND
ATTRIBUTES	Attributes against a Facility		«Attribute_Code» «Attribute_Descr»	
BOOKCLIPS	Attachments against a Booking	Y	«Attachment_File» «Attachment_Description»	
BOOKCONDS	Conditions against a Booking	Y	«Condition_Code» «Condition_Descr» «Condition_Type_Descr» «Condition_Apply_Date» «Condition_Lapse_Date» «Condition_Document» «Condition_Comments»	
BOOKLINES	Booking Lines against a Booking	Y	«Booking_Date» «Booking_Start_Time» «Booking_End_Time» «Facility_Code» «Facility_Descr» «Booking_Line_Descr» «Booking_Line_Status» «Cancel_Decline_Reason_Cde» «Cancel_Decline_Reason_Dsc» «Fees» «Resources» «Properties» «Street_Suburbs»	FEES
CASHPAYTRAN	Cash Payment Transactions		«Fee_Transaction_Type» «Transaction_Date» «Amount» «Tax_Amount» «Transaction_Description»	
FACILITIES	All Facilities against a Booking		«Facility_Code» «Facility_Descr» «Parent_Facility_Code» «Parent_Facility_Descr» «Facility_Type_Code»	ATTRIBUTE FACLCOND

			«Facility_Type_Descr» «Capacity» «Facility_Details» «Conditions» «Resources» «Attributes» «Paperclip»	
FACLCLIPS	Attachments against a Facility	Y	«Attachment_File» «Attachment_Description»	
FACLCONDS	Conditions against a Facility	Y	«Condition_Code» «Condition_Descr» «Condition_Type_Descr» «Condition_Apply_Date» «Condition_Lapse_Date» «Condition_Document» «Condition_Comments»	
FEES	All Fees against a Booking		«Charge_Description» «Fee_Code» «Fee_Description» «Calculated_Amount» «Discount_Amount» «Fee_Total_Amount» «Fee_Tax_Amount» «Originating_Invoice» «In_Relation_To_Type» «In_Relation_To_Descr» «Booking_Date» «Booking_Start_Time» «Booking_End_Time» «Cash_Payment_Transactions» «No_Hours_Or_Units» «Rate_Or_Fixed_Charge»	CASHPAYTRAN
LOCATIONS	All Properties and Street/Suburb locations against a Facility		«Properties» «Street_Suburbs»	PROPERTY STRTSUBR
NAMES	All Names against a Booking	Y	«Name» «Mailing_Address»	
NOTES	All Notes against a Booking	Y	«Note_Type_Code» «Note_Type_Descr» «System_Entered_Date_Time» «Note_Date_Time» «Officer_Code» «Officer_Descr» «Note»	
PROPERTY	All Properties against a Booking		«Owner» «Address» «Address_Single_Line» «Property_Key»	
RESOURCES	All Resources against a Booking		«Resource_Code» «Resource_Descr» «Resource_Type_Code» «Resource_Type_Descr» «Resource_Details»	
STRTSUBR	All Street/Suburb		«Street»	

locations against a Booking	«Suburb» «State» «Postcode»

Bookings Management- General Fields available through Merge Types

Note: The following fields will retrieve the *overriding mailing address* for the name receiving the document:

Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»

The following fields will source their formatting rules from the Name and Address Role Type CWP 1 (In Name and Address Parameters). The formatting for the Salutation field is determined by formatting rules that are defined at the system level. If there are multiple companies then the Name and Address System Default Mailing Salutation will be used. Where there is only one company then the Mailing Salutation for that company will be used:

Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»

General Fields

Activity Sub Type Code	«Activity_Sub_Type_Code»
Activity Sub Type Descr	«Activity_Sub_Type_Descr»
Activity Type Code	«Activity_Type_Code»
Activity Type Descr	«Activity_Type_Descr»
Affected Property	«Affected_Property»
Affected Property StAddr	«Affected_Property_StAddr»
Booking Activity Details	«Booking_Activity_Details»
Booking Activity Name	«Booking_Activity_Name»
Booking Attendees	«Booking_Attendees»
Booking Class Code	«Booking_Class_Code»
Booking Class Descr	«Booking_Class_Descr»
Booking Number	«Booking_Number»
Booking Status Code	«Booking_Status_Code»
Booking Status Descr	«Booking_Status_Descr»
Booking System Status	«Booking_System_Status»
Brought Forward	«Brought_Forward»
Carried Forward	«Carried_Forward»
Credit Reason	«Credit_Reason»
Customer Type Code	«Customer_Type_Code»
Customer Type Descr	«Customer_Type_Descr»
Doc Addressee Legal Name	«Doc_Addressee_Legal_Name»
Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»
Document Appl DPBARCODE	«Document_Appl_DPBARCODE»
Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»
Document Applicant Comm 1	«Document_Applicant_Comm_1»
Document Applicant Comm 2	«Document_Applicant_Comm_2»
Document Applicant Comm 3	«Document_Applicant_Comm_3»
Document Applicant Comm 4	«Document_Applicant_Comm_4»
Document Applicant Comm 5	«Document_Applicant_Comm_5»
Document Applicant Comm 6	«Document_Applicant_Comm_6»
Document Applicant Comm D	«Document_Applicant_Comm_D»
Document Applicant DPBSP	«Document_Applicant_DPBSP»
Document Applicant DPID	«Document_Applicant_DPID»
Document Applicant Info 1	«Document_Applicant_Info_1»
Document Applicant Info 2	«Document_Applicant_Info_2»
Document Applicant Info 3	«Document_Applicant_Info_3»
Document Applicant Info 4	«Document_Applicant_Info_4»
Document Applicant Info 5	«Document_Applicant_Info_5»

Document Applicant Info 6	«Document_Applicant_Info_6»
Document Applicant Info D	«Document_Applicant_Info_D»
Document Applicant Name	«Document_Applicant_Name»
Document Completion Date	«Document_Completion_Date»
Document Deflt Comm Descr	«Document_Deflt_Comm_Descr»
Document Deflt Info Descr	«Document_Deflt_Info_Descr»
Document Expiry Date	«Document_Expiry_Date»
Document Fee Amount	«Document_Fee_Amount»
Document Final Print Date	«Document_Final_Print_Date»
Document Issue Date	«Document_Issue_Date»
Document Issue DateTime	«Document_Issue_DateTime»
Document Lodgement Date	«Document_Lodgement_Date»
Document Name	«Document_Name»
Document Number	«Document_Number»
Document Path	«Document_Path»
Document Receipt Date	«Document_Receipt_Date»
Document Receipt Number	«Document_Receipt_Number»
Document Reference Date	«Document_Reference_Date»
Document Reference Number	«Document_Reference_Number»
Document Status	«Document_Status»
Document Summary	«Document_Summary»
Document User Id	«Document_User_Id»
Document User Name	«Document_User_Name»
Document User Signature	«Document_User_Signature»
Estimate Total Amount	«Estimate_Total_Amount»
Estimate Total Discount	«Estimate_Total_Discount»
Estimate Total Tax Amount	«Estimate_Total_Tax_Amount»
Invoice Debtor Name	«Invoice_Debtor_Name»
Invoice Debtor Address	«Invoice_Debtor_Address»
Invoice Debtor Number	«Invoice_Debtor_Number»
Invoice Number	«Invoice_Number»
Invoice Total Amount	«Invoice_Total_Amount»
Invoice Total Discount	«Invoice_Total_Discount»
Invoice Total Tax Amount	«Invoice_Total_Tax_Amount»
Merge Class Code	«Merge_Class_Code»
Merge Class Description	«Merge_Class_Description»
Merge Type Code	«Merge_Type_Code»
Merge Type Description	«Merge_Type_Description»
Merge Type Name	«Merge_Type_Name»
Merge Type Path	«Merge_Type_Path»
Receiving Officer Code	«Receiving_Officer_Code»
Receiving Officer Descr	«Receiving_Officer_Descr»
Refund Reason	«Refund_Reason»
Responsible Officer Code	«Responsible_Officer_Code»
Responsible Officer Descr	«Responsible_Officer_Descr»
System Entered Date	«System_Entered_Date»
System Entered Time	«System_Entered_Time»
ePathway ID	«ePathway_ID»
ePathway ID Name	«ePathway_ID_Name»

Rates - Extracts and Extracts with Filters

EXTRACT	DESCRIPTION	FILTER AVAILABLE	AVAILABLE FIELDS
ARRANGE	Arrangement Details	N	«Ass_Assm_Number» «Ass_Assm_Check_Digit» «Ass_Ratepay_Mail_Addr_Ln1» «Ass_Ratepay_Mail_Addr_Ln2» «Ass_Ratepay_Mail_Addr_Ln3» «Ass_Ratepay_Mail_Addr_Ln4» «Ass_Ratepay_Mail_Addr_Ln5» «Ass_Prop_Address_Line_1» «Ass_Prop_Address_Line_2» «Arrangement_Due_Date» «Arrangement_Amount_Due» «Paid_Amount» «Balance_Due»
ASSM_ATT	Rates Assessment Attachments	Y	«Attachment_File» «Attachment_Description»
CHRGLINE	Charge Line Details	N	«Rate_Type_Description» «RateUnitFixed_Charge» «Rateable_ValueNum_Units» «Transaction_Type» «Amount» «Rebate_Type»
CHRGLNSU	Supplementary Rates Charge Line Details	N	«Rate_Type_Description» «RateUnitFixed_Charge» «Rateable_ValueNum_Units» «Transaction_Type» «Charge_Amount» «Base_Amount» «Tax_Amount» «Rebate_Type» «From_Date» «To_Date» «Charge_Descr»
DDBTSCHD	Direct Debit Schedule	N	«DDbt_Amount_Due» «DDbt_Amount_Due_Date» «DDbt_Amount_Status»
RATENOTSUPPS	Rate Notice Supplementary Charge Line Details	N	«Supp_Rate_Type_Descr» «Supp_RateUnitFixed_Chrg» «Supp_Rate_ValueNum_Units» «Supp_Amount» «Supp_Tax_Amount» «Supp_Base_Amount» «Supp_From_Date» «Supp_To_Date» «Supp_Charge_Desc»
REFERENC	Rates Reference Extract List	Y	«Reference_Type» «Reference_Description» «Reference_Number» «Status» «Status_Date»

Rates - General Fields Available through Merge Types

Note: The following fields will retrieve the *overriding mailing address* for the name receiving the document:

Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»

The following fields will source their formatting rules from the Name and Address Role Type CWP 1 (In Name and Address Parameters). The formatting for the Salutation field is determined by formatting rules that are defined at the system level. If there are multiple companies then the Name and Address System Default Mailing Salutation will be used. Where there is only one company then the Mailing Salutation for that company will be used.

Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»

General Fields
DOC_STMT Extract List - for use when creating Debtor Documents (e.g. Invoices) and Statement Merge Types

Affected Property	«Affected_Property»
Ass Alt Inst Amount 1	«Ass_Alt_Inst_Amount_1»
Ass Alt Inst Amount 10	«Ass_Alt_Inst_Amount_10»
Ass Alt Inst Amount 11	«Ass_Alt_Inst_Amount_11»
Ass Alt Inst Amount 12	«Ass_Alt_Inst_Amount_12»
Ass Alt Inst Amount 2	«Ass_Alt_Inst_Amount_2»
Ass Alt Inst Amount 3	«Ass_Alt_Inst_Amount_3»
Ass Alt Inst Amount 4	«Ass_Alt_Inst_Amount_4»
Ass Alt Inst Amount 5	«Ass_Alt_Inst_Amount_5»
Ass Alt Inst Amount 6	«Ass_Alt_Inst_Amount_6»
Ass Alt Inst Amount 7	«Ass_Alt_Inst_Amount_7»
Ass Alt Inst Amount 8	«Ass_Alt_Inst_Amount_8»
Ass Alt Inst Amount 9	«Ass_Alt_Inst_Amount_9»
Ass Alt Inst Date 1	«Ass_Alt_Inst_Date_1»
Ass Alt Inst Date 10	«Ass_Alt_Inst_Date_10»
Ass Alt Inst Date 11	«Ass_Alt_Inst_Date_11»
Ass Alt Inst Date 12	«Ass_Alt_Inst_Date_12»
Ass Alt Inst Date 2	«Ass_Alt_Inst_Date_2»
Ass Alt Inst Date 3	«Ass_Alt_Inst_Date_3»
Ass Alt Inst Date 4	«Ass_Alt_Inst_Date_4»
Ass Alt Inst Date 5	«Ass_Alt_Inst_Date_5»
Ass Alt Inst Date 6	«Ass_Alt_Inst_Date_6»
Ass Alt Inst Date 7	«Ass_Alt_Inst_Date_7»
Ass Alt Inst Date 8	«Ass_Alt_Inst_Date_8»
Ass Alt Inst Date 9	«Ass_Alt_Inst_Date_9»
Ass Assm Check Digit	«Ass_Assm_Check_Digit»
Ass Assm Location	«Ass_Assm_Location»
Ass Assm Number	«Ass_Assm_Number»
Ass Assm Status	«Ass_Assm_Status»
Ass Assm Status Date	«Ass_Assm_Status_Date»
Ass Balance	«Ass_Balance»
Ass BalancePending	«Ass_BalancePending»
Ass DueBalance	«Ass_DueBalance»
Ass Inst Amount 1	«Ass_Inst_Amount_1»
Ass Inst Amount 10	«Ass_Inst_Amount_10»
Ass Inst Amount 11	«Ass_Inst_Amount_11»
Ass Inst Amount 12	«Ass_Inst_Amount_12»
Ass Inst Amount 2	«Ass_Inst_Amount_2»
Ass Inst Amount 3	«Ass_Inst_Amount_3»
Ass Inst Amount 4	«Ass_Inst_Amount_4»

Ass Inst Amount 5	«Ass_Inst_Amount_5»
Ass Inst Amount 6	«Ass_Inst_Amount_6»
Ass Inst Amount 7	«Ass_Inst_Amount_7»
Ass Inst Amount 8	«Ass_Inst_Amount_8»
Ass Inst Amount 9	«Ass_Inst_Amount_9»
Ass Inst Date 1	«Ass_Inst_Date_1»
Ass Inst Date 10	«Ass_Inst_Date_10»
Ass Inst Date 11	«Ass_Inst_Date_11»
Ass Inst Date 12	«Ass_Inst_Date_12»
Ass Inst Date 2	«Ass_Inst_Date_2»
Ass Inst Date 3	«Ass_Inst_Date_3»
Ass Inst Date 4	«Ass_Inst_Date_4»
Ass Inst Date 5	«Ass_Inst_Date_5»
Ass Inst Date 6	«Ass_Inst_Date_6»
Ass Inst Date 7	«Ass_Inst_Date_7»
Ass Inst Date 8	«Ass_Inst_Date_8»
Ass Inst Date 9	«Ass_Inst_Date_9»
Ass Rateable Valuation	«Ass_Rateable_Valuation»
Ass Ratepayer Address	«Ass_Ratepayer_Address»
Ass Ratepayer Name	«Ass_Ratepayer_Name»
Ass VG Number	«Ass_VG_Number»
Ass VG Tenancy Number	«Ass_VG_Tenancy_Number»
Brought Forward	«Brought_Forward»
Carried Forward	«Carried_Forward»
Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»
Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»
Document Applicant Comm 1	«Document_Applicant_Comm_1»
Document Applicant Comm 2	«Document_Applicant_Comm_2»
Document Applicant Comm 3	«Document_Applicant_Comm_3»
Document Applicant Comm 4	«Document_Applicant_Comm_4»
Document Applicant Comm 5	«Document_Applicant_Comm_5»
Document Applicant Comm 6	«Document_Applicant_Comm_6»
Document Applicant Comm D	«Document_Applicant_Comm_D»
Document Applicant Info 1	«Document_Applicant_Info_1»
Document Applicant Info 2	«Document_Applicant_Info_2»
Document Applicant Info 3	«Document_Applicant_Info_3»
Document Applicant Info 4	«Document_Applicant_Info_4»
Document Applicant Info 5	«Document_Applicant_Info_5»
Document Applicant Info 6	«Document_Applicant_Info_6»
Document Applicant Info D	«Document_Applicant_Info_D»
Document Applicant Name	«Document_Applicant_Name»
Document Completion Date	«Document_Completion_Date»
Document Deflt Comm Descr	«Document_Deflt_Comm_Descr»
Document Deflt Info Descr	«Document_Deflt_Info_Descr»
Document Expiry Date	«Document_Expiry_Date»
Document Fee Amount	«Document_Fee_Amount»
Document Issue Date	«Document_Issue_Date»
Document Lodgement Date	«Document_Lodgement_Date»
Document Name	«Document_Name»
Document Number	«Document_Number»
Document Path	«Document_Path»
Document Receipt Date	«Document_Receipt_Date»
Document Receipt Number	«Document_Receipt_Number»
Document Reference Date	«Document_Reference_Date»
Document Reference Number	«Document_Reference_Number»
Document Status	«Document_Status»
Document User Id	«Document_User_Id»
Document User Name	«Document_User_Name»
Document User Signature	«Document_User_Signature»
Merge Class Code	«Merge_Class_Code»
Merge Class Description	«Merge_Class_Description»

Merge Type Code	«Merge_Type_Code»
Merge Type Description	«Merge_Type_Description»
Merge Type Name	«Merge_Type_Name»
Merge Type Path	«Merge_Type_Path»

RATENOTICE Extract List - for use when creating Rate Notice Merge Types

Affected Property	«Affected_Property»
Ass Alt Inst Amount 1	«Ass_Alt_Inst_Amount_1»
Ass Alt Inst Amount 10	«Ass_Alt_Inst_Amount_10»
Ass Alt Inst Amount 11	«Ass_Alt_Inst_Amount_11»
Ass Alt Inst Amount 12	«Ass_Alt_Inst_Amount_12»
Ass Alt Inst Amount 2	«Ass_Alt_Inst_Amount_2»
Ass Alt Inst Amount 3	«Ass_Alt_Inst_Amount_3»
Ass Alt Inst Amount 4	«Ass_Alt_Inst_Amount_4»
Ass Alt Inst Amount 5	«Ass_Alt_Inst_Amount_5»
Ass Alt Inst Amount 6	«Ass_Alt_Inst_Amount_6»
Ass Alt Inst Amount 7	«Ass_Alt_Inst_Amount_7»
Ass Alt Inst Amount 8	«Ass_Alt_Inst_Amount_8»
Ass Alt Inst Amount 9	«Ass_Alt_Inst_Amount_9»
Ass Alt Inst Date 1	«Ass_Alt_Inst_Date_1»
Ass Alt Inst Date 10	«Ass_Alt_Inst_Date_10»
Ass Alt Inst Date 11	«Ass_Alt_Inst_Date_11»
Ass Alt Inst Date 12	«Ass_Alt_Inst_Date_12»
Ass Alt Inst Date 2	«Ass_Alt_Inst_Date_2»
Ass Alt Inst Date 3	«Ass_Alt_Inst_Date_3»
Ass Alt Inst Date 4	«Ass_Alt_Inst_Date_4»
Ass Alt Inst Date 5	«Ass_Alt_Inst_Date_5»
Ass Alt Inst Date 6	«Ass_Alt_Inst_Date_6»
Ass Alt Inst Date 7	«Ass_Alt_Inst_Date_7»
Ass Alt Inst Date 8	«Ass_Alt_Inst_Date_8»
Ass Alt Inst Date 9	«Ass_Alt_Inst_Date_9»
Ass Assm Check Digit	«Ass_Assm_Check_Digit»
Ass Assm Location	«Ass_Assm_Location»
Ass Assm Number	«Ass_Assm_Number»
Ass Assm Status	«Ass_Assm_Status»
Ass Assm Status Date	«Ass_Assm_Status_Date»
Ass Balance	«Ass_Balance»
Ass BalancePending	«Ass_BalancePending»
Ass DueBalance	«Ass_DueBalance»
Ass Inst Amount 1	«Ass_Inst_Amount_1»
Ass Inst Amount 10	«Ass_Inst_Amount_10»
Ass Inst Amount 11	«Ass_Inst_Amount_11»
Ass Inst Amount 12	«Ass_Inst_Amount_12»
Ass Inst Amount 2	«Ass_Inst_Amount_2»
Ass Inst Amount 3	«Ass_Inst_Amount_3»
Ass Inst Amount 4	«Ass_Inst_Amount_4»
Ass Inst Amount 5	«Ass_Inst_Amount_5»
Ass Inst Amount 6	«Ass_Inst_Amount_6»
Ass Inst Amount 7	«Ass_Inst_Amount_7»
Ass Inst Amount 8	«Ass_Inst_Amount_8»
Ass Inst Amount 9	«Ass_Inst_Amount_9»
Ass Inst Date 1	«Ass_Inst_Date_1»
Ass Inst Date 10	«Ass_Inst_Date_10»
Ass Inst Date 11	«Ass_Inst_Date_11»
Ass Inst Date 12	«Ass_Inst_Date_12»
Ass Inst Date 2	«Ass_Inst_Date_2»
Ass Inst Date 3	«Ass_Inst_Date_3»
Ass Inst Date 4	«Ass_Inst_Date_4»
Ass Inst Date 5	«Ass_Inst_Date_5»
Ass Inst Date 6	«Ass_Inst_Date_6»
Ass Inst Date 7	«Ass_Inst_Date_7»

Ass Inst Date 8	«Ass_Inst_Date_8»
Ass Inst Date 9	«Ass_Inst_Date_9»
Ass Rateable Valuation	«Ass_Rateable_Valuation»
Ass Ratepayer Address	«Ass_Ratepayer_Address»
Ass Ratepayer Name	«Ass_Ratepayer_Name»
Ass VG Number	«Ass_VG_Number»
Ass VG Tenancy Number	«Ass_VG_Tenancy_Number»
Brought Forward	«Brought_Forward»
Carried Forward	«Carried_Forward»
Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»
Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»
Document Applicant Comm 1	«Document_Applicant_Comm_1»
Document Applicant Comm 2	«Document_Applicant_Comm_2»
Document Applicant Comm 3	«Document_Applicant_Comm_3»
Document Applicant Comm 4	«Document_Applicant_Comm_4»
Document Applicant Comm 5	«Document_Applicant_Comm_5»
Document Applicant Comm 6	«Document_Applicant_Comm_6»
Document Applicant Comm D	«Document_Applicant_Comm_D»
Document Applicant Info 1	«Document_Applicant_Info_1»
Document Applicant Info 2	«Document_Applicant_Info_2»
Document Applicant Info 3	«Document_Applicant_Info_3»
Document Applicant Info 4	«Document_Applicant_Info_4»
Document Applicant Info 5	«Document_Applicant_Info_5»
Document Applicant Info 6	«Document_Applicant_Info_6»
Document Applicant Info D	«Document_Applicant_Info_D»
Document Applicant Name	«Document_Applicant_Name»
Document Completion Date	«Document_Completion_Date»
Document Deflt Comm Descr	«Document_Deflt_Comm_Descr»
Document Deflt Info Descr	«Document_Deflt_Info_Descr»
Document Expiry Date	«Document_Expiry_Date»
Document Fee Amount	«Document_Fee_Amount»
Document Issue Date	«Document_Issue_Date»
Document Lodgement Date	«Document_Lodgement_Date»
Document Name	«Document_Name»
Document Number	«Document_Number»
Document Path	«Document_Path»
Document Receipt Date	«Document_Receipt_Date»
Document Receipt Number	«Document_Receipt_Number»
Document Reference Date	«Document_Reference_Date»
Document Reference Number	«Document_Reference_Number»
Document Status	«Document_Status»
Merge Class Code	«Merge_Class_Code»
Merge Class Description	«Merge_Class_Description»
Merge Type Code	«Merge_Type_Code»
Merge Type Description	«Merge_Type_Description»
Merge Type Name	«Merge_Type_Name»
Merge Type Path	«Merge_Type_Path»

Inspections - Extracts and Extracts with Filters

EXTRACT	DESCRIPTION	FILTER AVAILABLE	AVAILABLE FIELDS	ASSOCIATED EXTRACT
INSPECT	Inspections Extract	Y	«Type» «Area» «Result» «Date» «Time» «Number» «Officer» «Officer_Id» «Requestor» «Insp_Requestor_Address» «Insp_Requestor_Address_1_Line» «Insp_Requestor_Comm_1» «Insp_Requestor_Comm_2» «Insp_Requestor_Comm_3» «Insp_Requestor_Info_1» «Insp_Requestor_Info_2» «Insp_Requestor_Info_3» «Insp_Requestor_Name» «Locations» «Template_1» «Template_2» «Template_3» «Template_4» «Template_5» «Template_6» «Notes» «Failed»	NOTES FAILED
NOTES	Inspection Notes Extract	N	«Date» «Time» «Officer» «Officer_Id» «Note»	
FAILED	Inspection Failed Extract	N	«Failed_Reasons»	
I_NOTES	Inspection Notes relating to Register	N	«Date» «Time» «Officer» «Officer_Id» «Note»	
I_FAILED	Failure Reasons relating to Register	N	«Failed_Reason»	

Inspections - General Fields Available through Merge Types

Note: The following fields will retrieve the *overriding mailing address* for the name receiving the document:

Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»

The following fields will source their formatting rules from the Name and Address Role Type CWP 1 (In Name and Address Parameters). The formatting for the Salutation field is determined by formatting rules that are defined at the system level. If there are multiple companies then the Name and Address System Default Mailing Salutation will be used. Where there is only one company then the Mailing Salutation for that company will be used.

Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»

General Fields

Affected Property	«Affected_Property»
Brought Forward	«Brought_Forward»
Carried Forward	«Carried_Forward»
Doc Addressee SalCon	«Doc_Addressee_SalCon»
Doc Addressee Salutation	«Doc_Addressee_Salutation»
Document Applicant Addr M	«Document_Applicant_Addr_M»
Document Applicant Addres	«Document_Applicant_Addres»
Document Applicant Comm 1	«Document_Applicant_Comm_1»
Document Applicant Comm 2	«Document_Applicant_Comm_2»
Document Applicant Comm 3	«Document_Applicant_Comm_3»
Document Applicant Comm 4	«Document_Applicant_Comm_4»
Document Applicant Comm 5	«Document_Applicant_Comm_5»
Document Applicant Comm 6	«Document_Applicant_Comm_6»
Document Applicant Comm D	«Document_Applicant_Comm_D»
Document Applicant Info 1	«Document_Applicant_Info_1»
Document Applicant Info 2	«Document_Applicant_Info_2»
Document Applicant Info 3	«Document_Applicant_Info_3»
Document Applicant Info 4	«Document_Applicant_Info_4»
Document Applicant Info 5	«Document_Applicant_Info_5»
Document Applicant Info 6	«Document_Applicant_Info_6»
Document Applicant Info D	«Document_Applicant_Info_D»
Document Applicant Name	«Document_Applicant_Name»
Document Completion Date	«Document_Completion_Date»
Document Deflt Comm Descr	«Document_Deflt_Comm_Descr»
Document Deflt Info Descr	«Document_Deflt_Info_Descr»
Document Expiry Date	«Document_Expiry_Date»
Document Fee Amount	«Document_Fee_Amount»
Document Issue Date	«Document_Issue_Date»
Document Lodgement Date	«Document_Lodgement_Date»
Document Name	«Document_Name»
Document Number	«Document_Number»
Document Path	«Document_Path»
Document Receipt Date	«Document_Receipt_Date»
Document Receipt Number	«Document_Receipt_Number»
Document Reference Date	«Document_Reference_Date»
Document Reference Number	«Document_Reference_Number»
Document Status	«Document_Status»
Document User Id	«Document_User_Id»
Document User Name	«Document_User_Name»
Document User Signature	«Document_User_Signature»

Merge Class Code	«Merge_Class_Code»
Merge Class Description	«Merge_Class_Description»
Merge Type Code	«Merge_Type_Code»
Merge Type Description	«Merge_Type_Description»
Merge Type Name	«Merge_Type_Name»
Merge Type Path	«Merge_Type_Path»
Insp_Requestor Address	«Insp_Requestor_Address»
Insp_Requestor Address 1 Line	«Insp_Requestor_Address_1_Line»
Insp_Requestor Comm 1	«Insp_Requestor_Comm_1»
Insp_Requestor Comm 2	«Insp_Requestor_Comm_2»
Insp_Requestor Comm 3	«Insp_Requestor_Comm_3»
Insp_Requestor Info 1	«Insp_Requestor_Info_1»
Insp_Requestor Info 2	«Insp_Requestor_Info_2»
Insp_Requestor Info 3	«Insp_Requestor_Info_3»
Insp_Requestor Name	«Insp_Requestor_Name»

Document Handling

The following topic is covered in this section:

Copying and Moving Documents

Copying or moving documents from one directory or environment to another.

Overview
Sites may decide for one reason or another to move existing Pathway Word Processing documents from one Directory to another or one Environment to another. This decision may be brought about when a site is upgrading from one version of their Word Processing software to another.

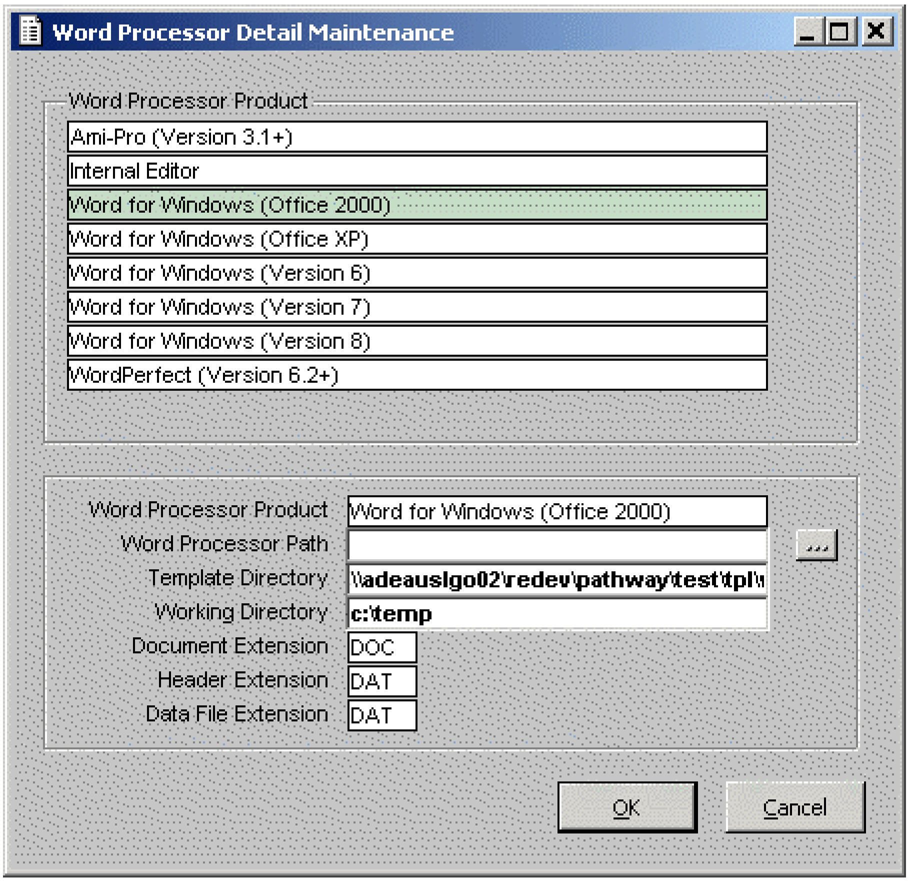
This can be done. However, the following should be used as a guide to ensure that you are then able to access the documents via Pathway once they have been moved.

The Pathway Word Processing System requires specific directories to be available:

<u>TEMPLATE DIRECTORY</u>
The templates used for Pathway documents are stored in the TPL directory,
e.g. for Word 97
X:\PATHWAY\TPL\WW8\MRGTYPE.DOT
EXTTYPE.DOT
DOCTYPE.DOT

Once documents are generated with the templates in these locations, Word stores the location of the templates within the document.
If this location is changed or moved then Word may not be able to find the template, and the Return button may not display on the Menu bar of opened documents.
The directory path must be changed in Word Processor Detail Maintenance to reflect the new location.

e.g.



Showing Template Directory Path

<u>DOCUMENT DIRECTORY</u>
This is the directory where all of the documents that are created within Pathway are stored – Extract Type Documents, Merge Type Documents, Final Documents etc
e.g. These can be seen through Explorer as follows:

X:\Pathway***	\final	\00000000\
	\header	\00000000\
	\include	\00000000\
	\memos	\00000000\
	\template	\00000000\

X: being the directory name. This may be a UNC address.
*** being the application Code of LAP, LLC, LPA, LRA etc

The ***\HEADER directory is created automatically when Header files are created. The other directories are created as the appropriate documents are generated.
(Therefore the path need only be entered as X:\Pathway in Product Application Maintenance).

The documents in the Final directory get the template of DOCTYPE.DOT attached to them, while the documents in the Template directory get the MRGTYPE.DOT or EXTTYPE.DOT attached to them.

If this location is changed or moved, then all existing documents in the old location need to be copied to similar directories in the new location.
Header files will be created in the new location under the directory, X:\PATHWAY***\HEADER when the new location is set up in Product Application Maintenance and the Header files are regenerated.
Any new documents created will be stored in the new location with the correct headers and templates.
Templates need to be reattached only if the template location changes.
Data sources need to be reattached if the document directory changes.

<u>WORKING DIRECTORY</u>
This is where documents are temporarily merged. This path is normally C:\Temp

If a user ever changes this to another directory on their C drive etc, they may find the Merge Types no longer merge and errors occur.
This is because Merge Types include Extract Type documents and the 'Include' statements in the Merge Type indicate that Extract Types are stored in the old location.

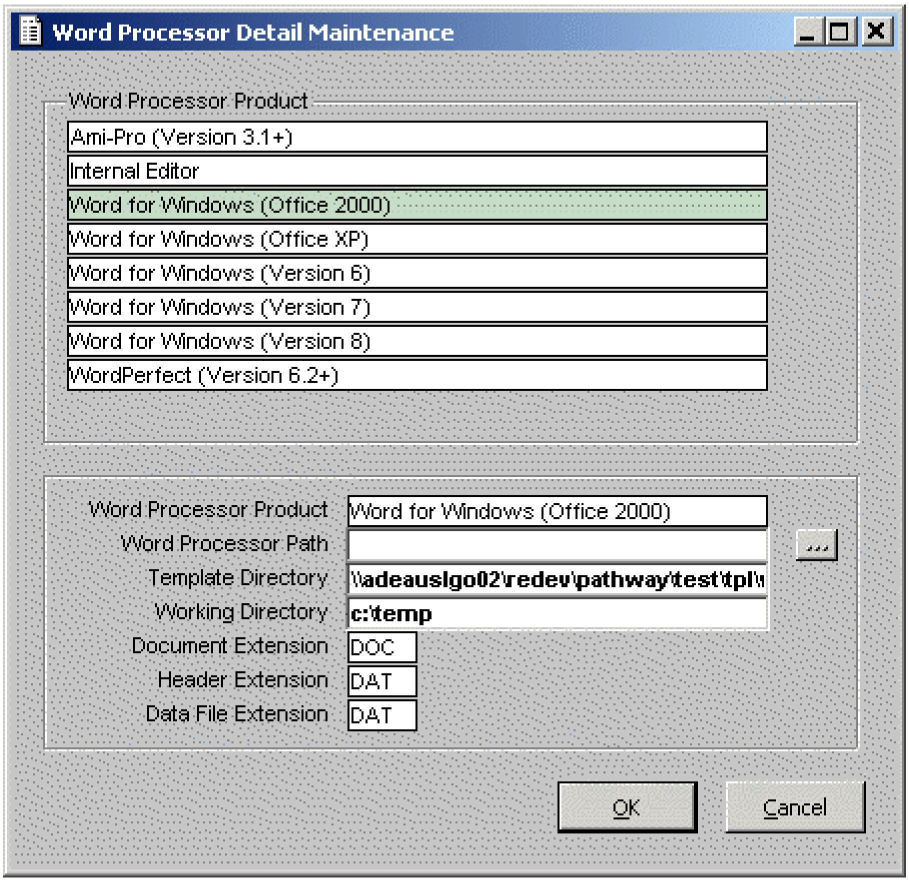
Procedure

❑ **Changing the Template location**

1. Copy all documents from the following directories to similar directories in the new location:

X:\PATHWAY\TPL\WW8\MRGTYPE.DOT
EXTTYPE.DOT
DOCTYPE.DOT

2. In Word Processor Detail Maintenance, ensure that the Template directory is pointing to the new location for the template files, e.g.



Showing Template Directory Details

3. In Windows Explorer

- Open each document in its new location and check the template (Tools/Templates & Add-ins).
- The template path will reflect the old location.
- Attach the new template (Attach button).
- Save the document.

4. When all documents have had their templates reattached, each Extract Type and Merge Type needs to be opened in its respective Pathway application, and resaved. This process should save the new path within each document.

❑ **Changing the Document location**

1. Copy all documents from the following directories to similar directories in the new location:

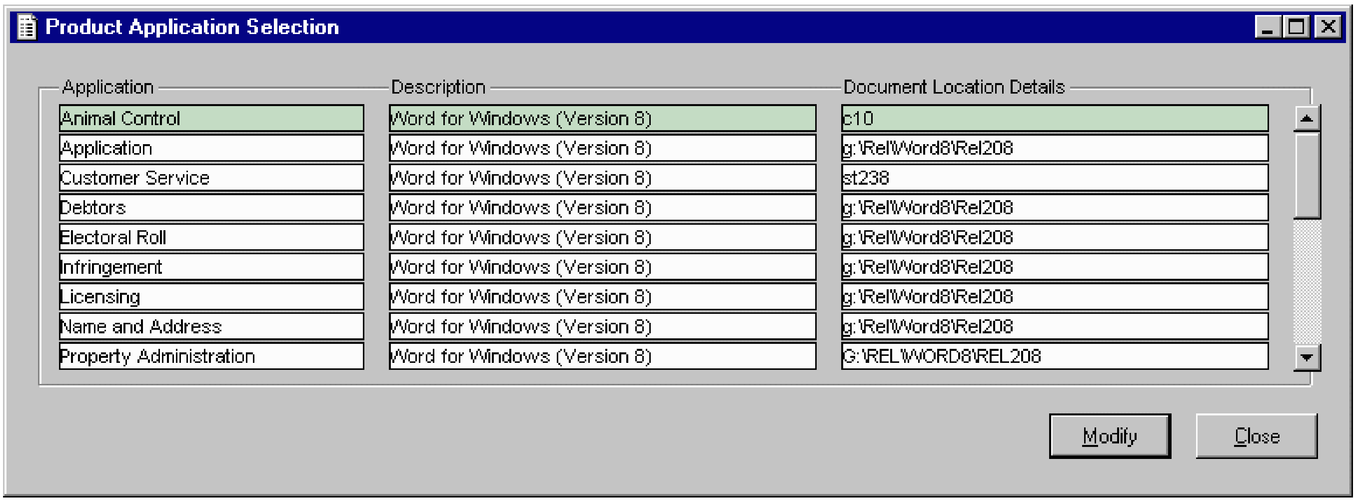
X:\PATHWAY\ACR\FINAL\00000000\all documents

HEADER\ all documents
\00000000\ all documents
INCLUDE\00000000\ all documents
MEMOS\00000000\ all documents
TEMPLATE\00000000\ all documents

..........\CNA\......

........\CRC\......... etc

2. In Product Application Maintenance, ensure that each application has the correct path to the new document location, e.g. X:\PATHWAY



Application	Description	Document Location Details
Animal Control	Word for Windows (Version 8)	c10
Application	Word for Windows (Version 8)	g:\Rel\Word8\Rel208
Customer Service	Word for Windows (Version 8)	st238
Debtors	Word for Windows (Version 8)	g:\Rel\Word8\Rel208
Electoral Roll	Word for Windows (Version 8)	g:\Rel\Word8\Rel208
Infringement	Word for Windows (Version 8)	g:\Rel\Word8\Rel208
Licensing	Word for Windows (Version 8)	g:\Rel\Word8\Rel208
Name and Address	Word for Windows (Version 8)	g:\Rel\Word8\Rel208
Property Administration	Word for Windows (Version 8)	G:\REL\WORD8\REL208

Showing Document Location Details

As the following directories are created by Pathway as needed, the path need only be entered as X:\PATHWAY.

***\HEADER\00000000
\FINAL\00000000 etc

3. In Header File Maintenance, select all the applications and regenerate the headers. These headers will be stored in the following location, e.g.

X:\PATHWAY\LAP\HEADER\Affprop.dat
\Amendmnt.dat
\Appdims.dat

4. Data sources need to be reattached if the document directory changes. If the data source cannot be found the following message would be displayed "Cannot find data source". The specified data file will need to be manually located and attached.

5. Any new documents created will be stored in the new location with the correct headers, templates and data sources.

❑ **Changing the Working Directory location**

1. Edit each Merge Type template and maintain the ‘Include’ text statements to reflect the new working directory location.

2. Deselect all Extract Types, save the Merge Type and then reselect the Extract Type(s).

3. Edit the document. This will automatically include the Extract Type ‘Include’ statements again.

4. Reformat the document as required. Remember to remove any old incorrect 'Include text' statements.

Document Update Control - Automated process

This function is available to simplify the process of reattaching templates and datasources to documents once the documents have been moved to another location. The 'Document Update Control' option may be accessed from the Batch Functions menu option within Word Processing.

The program allows the User to specify which Applications are to be processed and has two processing options:
(a) Update data sources on Template Documents
(b) Update "Return To System" Template on all documents

The following steps will need to be performed <u>before</u> running Document Update Control to update the data source on template documents.

<u>(a) Update data sources on Template Documents</u>
1) The new server is put on the network and all the documents are copied from one server to the other. Note that the documents will also need to remain in the original location.
2) If the old location is an FTP site and the new location is a non FTP site, in addition, all the old documents need to be copied to the old working directory (eg: C:\temp).
3) Go to Word Processing Parameters / Product Application Maintenance to update External Application Document location to the new location
4) If a document is not a Template document but is a Mail Merge document (possibly a user defined, non-standard Pathway Document), the data source re-attaching has to be done manually by the User before this program is executed.

The following steps need to be performed before running Document Update Control to update the "Return To System" Template on all documents.
Please note if you are running this option combined with option (a), do not perform Step 1 to Step 4 as this has been done by option (a) already.

<u>(b) Update "Return To System" Template on all documents</u>
1) The new server is put on the network and all the documents are copied from one server to the other. Note that the documents will also need to remain in the original location.
2) If the old location is an FTP site and new location is a non FTP site, in addition, all the old documents need to be copied to the old working directory (eg: C:\temp).
3) Go to Word Processing Parameters / Product Application Maintenance to update the External Application Document location to the new location
4) If a document is not a Template document but is a Mail Merge document (possibly a user defined, non-standard Pathway Document), the data source re-attaching has to be done manually by the User before this program is executed.
5) Copy "Return to System" templates from their original template directory to the new location
6) Go to Word Processing Parameters / Maintain Word Processing Details to update the template directory to its new location.

<u>Processing Details:</u>
The following problem may happen while processing documents and the data source is being updated on Merge Types or Extract Types:

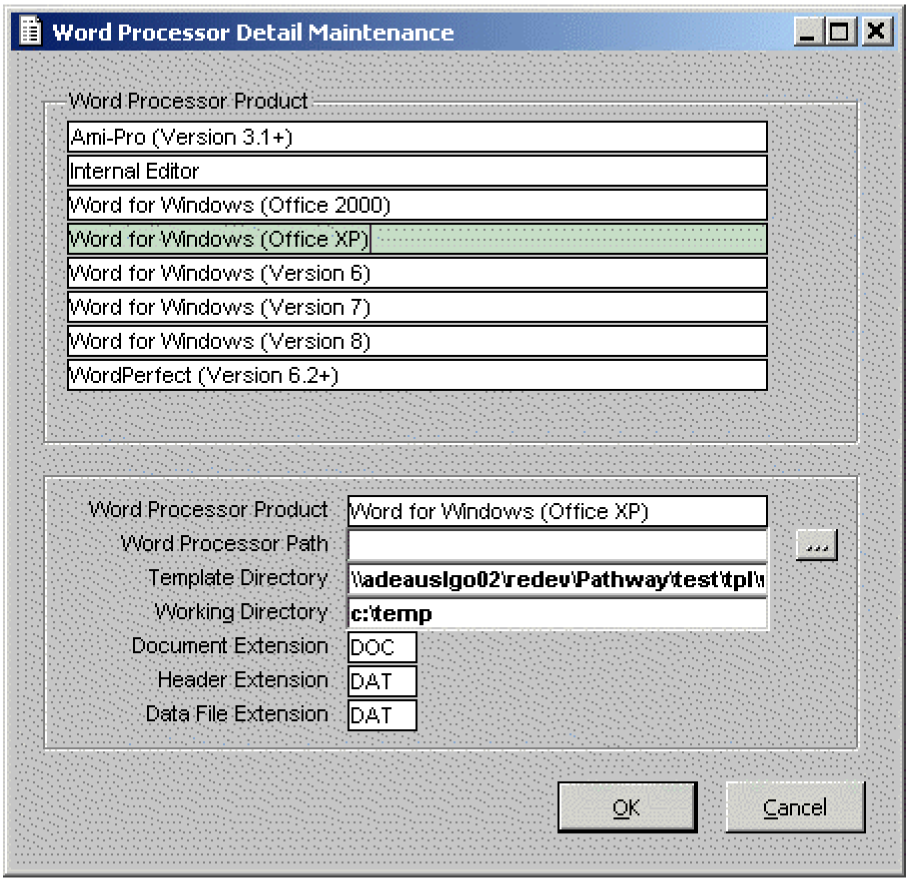
When the conversion program is trying to open a document whose data source file is missing, Word will open a dialog box to force you to select a data source. The type of document can be determined from the processing information displayed in the status bar ("T" for template document, "F" for final document, etc).
For a template document, you can select any data source, as the correct data source will be re-attached when the template is processed.
If the process has completed abnormally, a new session will need to be started to reprocess remaining documents after any problems have been manually corrected.

Procedures for Converting from Word6 to Word8

Converting from Word 6 to Word 8 Where Existing Documents Are Not Moved

In Explorer
1. Copy and store elsewhere or rename the templates that are stored in the \tpl directory.
2. Copy the 3 templates (mrgtype.dot, exttype.dot and doctype.dot) that are stored in the \tpl\ww8 directory and paste them back into the \tpl directory overwriting the existing ones (these should have been stored elsewhere or renamed if the need arises to revert back to them).
   (You must remember if you do this every time Pathway gets upgraded your “tpl” directory will get overridden with the standard templates. Therefore the templates in ww8 will need to be copied back again after each upgrade).

In Pathway
1. Go to Word Processor Details Maintenance Option and click on the Word for Windows (version 8) field.
2. Change your path so that Pathway recognises where you have stored the Word 8 (Word 97) executable file. (Word Processor Path parameter – within Word Processor Detail Maintenance Option). This is optional as Pathway will locate the path for Word97 from the Registry settings.
3. Copy the Template Parameters exactly as they were for Word 6.
4. Copy the Document Directory exactly as it was for Word 6.
5. Copy the Working Directory exactly as it was for Word 6.
6. Regenerate Headers



Manual Conversion Of Word6 to Word8 where the Documents are moved to the Word8 Directory

If you wish to move your Word 6 Merge Types and documents to the Word 8 directory, you will need to carry out the following procedures:

Step 1: Using Explorer:

1. Copy the documents from the Word6 Final, Include, Template and Header directories into the equivalent Word8 directories.

Step 2: Using Word 6:

2. Open a Word 6 template document (e.g. 85964.doc stored in the ..\Word8***\template\00080000 directory)
3. Select File/Templates
4. Select Attach and choose Normal.dot as the template (this detaches the Word6 Mrgtype.dot template)
5. Click OK
   (Now the document is no longer a merge document)
6. Save and close the document.
7. Repeat with each Word6 template document.

Step 3: Using Word 8:

8. Open the document in the Word8***\template\00080000 folder.
9. Select Tools/Templates & Add-Ins
10. Select Attach and select the Word 8 template (Mrgtype.dot) from the ..\..\Tpl\WW8 folder.
11. Click OK
12. Save and close the document (as a Word 8 document when prompted).
13. Repeat with each template document.

The documents are now in Word 8 format with the correct template (i.e. .dot file) attached.

Step 4: In Pathway:

14. Ensure that the Word Processing paths are pointing to Word97
15. Regenerate the header files.
16. Open the Merge Type and check that it works correctly.
17. Generate a document using the Merge Type and check that it can be created successfully.

Section 7

The following topics are covered in this section:

System Features

This document is designed to be used in conjunction with the Word Processing User Guide to help establish Section 7 documents, or any other specific Certificates that may be required.

The Extract Types that are created through Property are used specifically to allow the filtering of different information on your certificates.

Any Extract Types that use an Extract List Type of Parcels or Titles, will allow a Conditions Extract to be associated to it. This will then show on the document any Conditions that are associated with the Parcel and Titles on the Property.

Any Extract Types that use an Extract List Type of Conditions has a further filtering feature to allow the user to be specific in the Condition Group and Type they wish to see printed on the document.

Selecting the Extract List Type of ALLAPPL, (All applications on a Property) also has the feature of filtering by Class and Consent Codes.

Parameters

In order for Section 7 documents to be processed, the correct Extract and Merge Types need to be set up in both the Property and Applications Modules.

The Setting up of these Extract and Merge Types is fully detailed in the Word Processing User Guide.

If required a separate Numbering Scheme will also need to be setup to differentiate between different other types of Certificates and the Section 7 document.

Various Work Flow rules apply to information being extracted on a Section 7 Certificate and these are documented below.

Property Certificate Rules

The following topics are covered in this section:

Extract Lists

The following Application Information may now be extracted onto a Property Certificate.

The ability exists to extract the following information from an Application

- Conditions and their Associated Document (currently available)
- Permits and Certificates
- Inspection Details
- Names
- Decisions

These 5 options can only be extracted when associated to either the APLICTNS or ALLAPPL extract that is created in the Property Module.

The APLICTNS Extract List Type is used for sites that only have single level Properties. and has the filtering options of Application Class and Consent Codes.

The ALLAPPL Extract List Type is for sites that use multi level Properties, and require Applications to be included for all sub levels. This Extract Type has the filtering options of Application Class and Consent Codes.

The Associated Application Extracts will have the following rules applied to them.

Conditions
The CONDS Extract List Type is used to in the Applications Module to include all Application Conditions in the Certificate. This allows the user to filter on specific Condition Groups and Condition Types.

In order for application condition documents to be included with the applications themselves in the Property Certificate or document you must do the following:

❑ Create an applications extract within Applications using CONDS - in the template of this document you must use the "includetext" and use the Application_Cond_Document with this includetext.

Permits and Certificates
The PERMCERT Extract List Type is used to include all Permits and Certificates in the Certificate. This allows the user to filter on a specific Permit or Certificate Type.

Inspection Details
The INSPECT Extract List Type is used to include all Inspection Records in the Certificate. This allows the user to filter on either all Inspections or specific Types et cetera.

Note: Due to a Microsoft Word limitation, where the Inspections extract is used to associate to the ALLAPPLE or APLICTNS extract, you cannot also have the Inspections Notes extract associated to the Inspections Extract. This means that only the base fields in the Inspections Extract can be displayed on the Certificate. We assume however that sites would normally only require extracting the Type of Inspection, the Date of the Inspection and possibly the results.

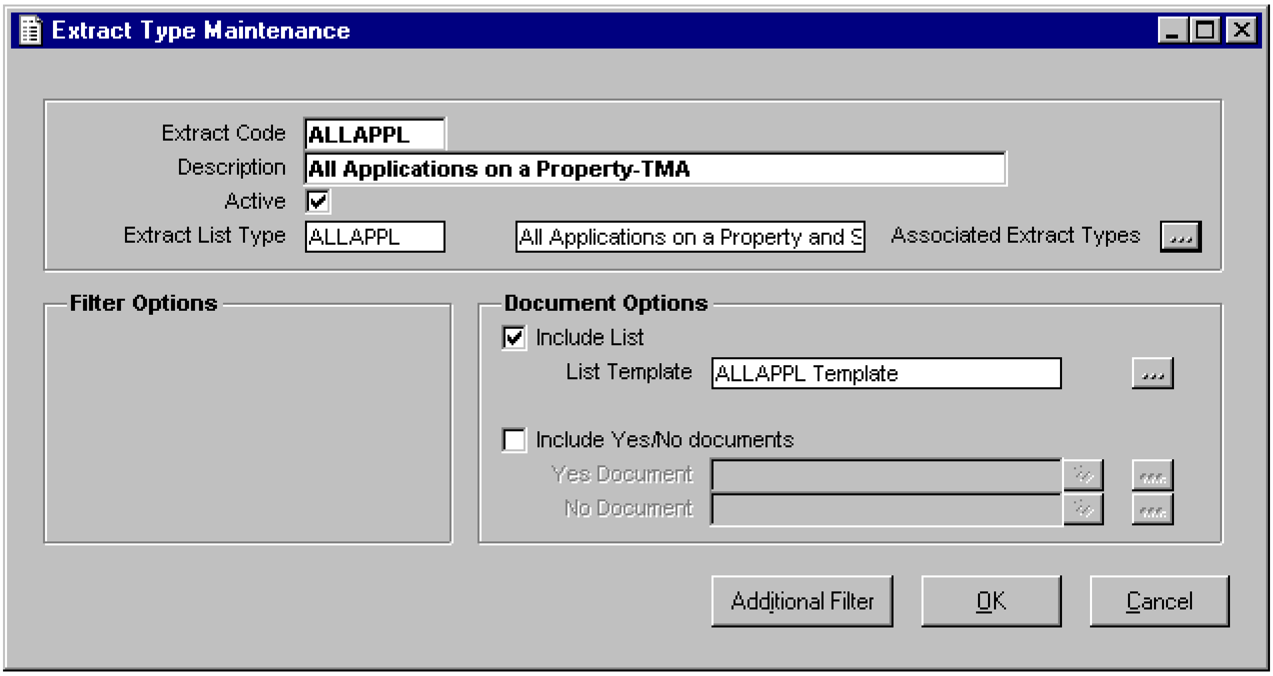
Names
The NAMES Extract List Type is used to include all Name Roles in the Certificate. This allows the user to filter on a specific Name Role.

Decisions
The DECISION Extract List Type is used to extract all Decisions on an Application. There is no filter on this extract.

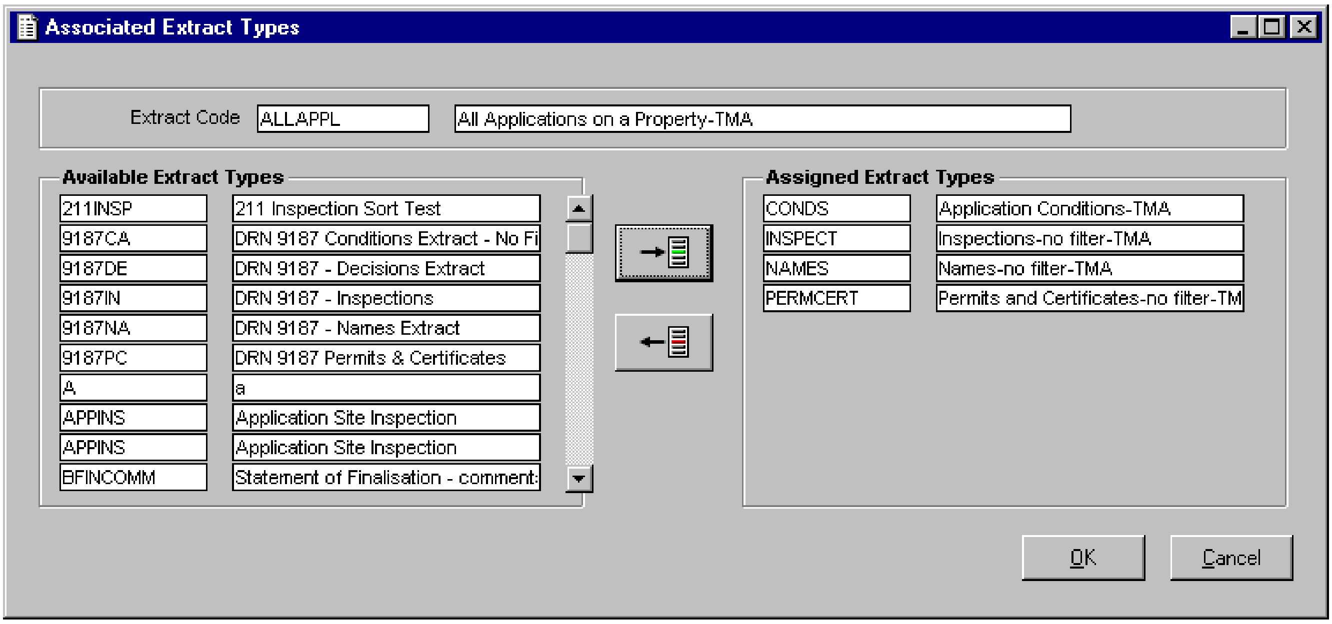
In order to have all or some of these extracts associated to your APLICTNS or ALLAPPS Extracts, the following should be done:

From the Property Module within the Certificates and Notice Parameters – using either the APLICTNS or ALLAPPL extract.

On the Extract of either APLICTNS or ALLAPPL, there is an Associated Extract Button on the form.



When the user selects this button the following form will be displayed.



The required extracts as detailed above will need to be assigned to the right hand side of the form.

Once the appropriate extracts have been assigned at the Associated Level, these need to be added as Include Text within your template.

To do this, open up the document, by clicking on the detail button next to the List Template field. Once in the document, when the user selects the Insert Merge Field option they will now see the additional options of:

Application_Cond_Document
Application_Pertcerts
Application_Names
Application_Inspections

Application_Decisions

<u>Using “Include” Documents</u>
These need to be added as “includetext”. To do this the following steps are required:

- From the Toolbar, Select the Insert, Field options
- Select Links and References category
- Select Include Text Field and click on OK

This will insert an Include statement similar to the following:
{INCLUDETEXT*MERGEFORMAT}

- Position the cursor after the INCLUDETEXT and before the| (ensure you leave a space after the end “T” in INCLUDETEXT)
- Click on the Insert Merge Field button on the Toolbar and select the appropriate Data Field (i.e. Detail Document).
- Remove the MERGEFORMAT statement which has been automatically inserted by Word to ensure that there is no bolding on the extracted data.
- The Final Include statement should appear similar to the following

{INCLUDETEXT [Mergefield Application_Cond_Document}}

<u>Suggestions for Setting Up This Document Are Detailed Below:</u>

For every Class of Application that you wish to have included in Property Certificates, you must go to each Class and create the required Extracts within each of the Classes.

As we need to ensure that the relevant Class information is passed to Property, on any of the 5 Extract forms that you are setting up, the Additional Filter Button must be selected and the relevant Class you are in chosen.

You may not wish to add any other filtering on the Extract but the Class is now mandatory so that Property can select the required information. Therefore each Additional Filter button must be accessed, the class selected and then the OK button chosen.

1. Create the required extracts in the Applications Module for the relevant Classes, click on the Additional Filter Button, choose that class and then click the OK Button.
2. Create the required Extract in the Property Module – e.g. APLICTNS or ALLAPPL within this Extract then use the Associated Extract option and assign the 5 Extracts created from your one class and assign.
3. Open the document template and use the “include text” option and include each of the 5 extracts.

Additionally where different filtering may be required in order to produce the correct result users will need to have multiple occurrences of the APLICTNS or ALLAPPL Extract within their Property Merge Type and filtered by the Class of Application they use.

This is because the APLICTNS and ALLAPPL Extracts can only have one of each type of the five Extracts associated at once. For example, only one Conditions Extract can be associated and only one Names extract can be associated etc.

As an example of this within your Final Property Certificate, the user may only wish to have two Name Roles appear.

If the Names filter in the Application NAMES Extract was not used this would extract every name role that is assigned to the Application.

If a filter in the Application NAMES Extract was applied - as an example Applicant, then only this name role would extract onto the Property Certificate.

Where more than one Name Role is required, then Multiple Name Role Extracts would be required to apply the relevant filters and then two APLICTNS or ALLAPPLS would be required in Property with the different Names Extracts associated to each.

Associated Extract Option On Aplictns Or Allappl Extract Via Property

- When using the Associated Extract Option on either APLICTNS or ALLAPPL, users will note that they may see several Names Extracts or several Inspections Extracts listed in the form. This is because they are displayed from every Class that has been setup in Applications Module.
- So as not to have any modifications made to these Extracts that could cause problems for Application staff we recommend brand new extracts within Applications are created specifically to include in the Property Certificate only in the one class chosen.
- It is recommended that they be named something unique so that when the list of Associated Extracts is displayed over in the Property module these are easily recognizable.
- For example 210CON, 210INS, 210NAM, 210PC, etc.

4. Create or Use an existing APLICTNS or ALLAPPL Extract in the Property Module
5. Click on the Associated Extracts Types option on the above Extract.
6. Assign the newly created Application Extracts e.g. 210CON, 210INS, 210NAM etc
7. Detail out to the List Template
8. Insert each of the assigned templates as include text as detailed above in the section "Using Include Documents".
9. Create a Merge Type within Property for your 210 or Section 7 certificate and assign your newly created APLICTNS or ALLAPPL Extract (s).

Always ensure that your descriptions are specifically clear so that when in the Property Module and attempting to use the Associated Extracts Option you can clearly recognize the specific Extract you wish to use for the Property Certificate.

In order to have both of your Names Extracts be reported on in your certificate, then two extracts of your APPLICTNS or ALLAPPL would need to be created and each one have the different NAMES Extract associated to it. Then these two Property Extracts will need to appear on the Merge Type created for the 210 or Section 7 document.

Users would also need to ensure the relevant fields within the Application Extracts are set up and possibly the use of tables without borders around them will be required to display this extracted information on the Property Certificate.

*** Please Note: Due to a Microsoft Word Limitation, where the Inspections extract is used to associate to the ALLAPPL or APLICTNS Extracts, you cannot also have the Inspections Notes Extract associated to the Inspections Extract. This means that only the base fields in the Inspections Extract can be displayed on the Certificate. We assume however that sites would normally only require to extract the Type of Inspection, the Date of the Inspection and possibly the results. ***

Applications

The Following rules apply for Applications to appear on Section 7 documents.

- Expired Applications are ignored - eg The Expiry Date is less than today's date.
- If an Application Class has been specified on an Extract Type, then only Applications matching that class will be included

Approved Applications

An Application with an Approval Decision and valid expiry date will appear on the document under the following conditions:

If a Consent has been specified as a Filter on the Extract Type the following rules apply:
- If there is no Consent on the Application then include the Application on the Certificate
- If there is a Consent on the Application then it must be an Approved Consent and include the Application on the Certificate
- If there is a Consent on the Application and it is not approved, the Application will not be included on the Certificate

If No Consent has been specified as a Filter on the Extract Type the following rules apply:
- If there is no Consent on the Application, then include the Application on the Certificate
- If there are Consents on the Application, regardless of the Status, of the Consent this Status is ignored and as it is an Approved Application, the Application is included in the Certificate

Non-approved Applications

An Application with a Rejection Decision will appear on the document under the following conditions:

If a Consent has been specified as a Filter on the Extract Type the following rules apply:
- Accept the Application only if the Consent that is on the Application is Approved

If No Consent has been specified as a Filter on the Extract Type the following rules apply:
- If there are no Consents on the Application exclude this Application from the Certificate
- If there are Consents on the Application, then these Consents are ignored and the Application is included in the Certificate.

For Multi-Tiered Property Structures to ensure that Applications are included from all levels, the ALLAPPL Extract List Type must be used.

Property Zones

For Multi Tiered Property Structures, the Zone will only appear on the Certificate for the Level that the Document is being produced for.

For Example if you have Properties as detailed below:

10-15 Main Street Zone 1
10 Main Street
Level 1/10 Main Street Zone 2
Level 2/10 Main Street

12 Main Street Zone 1
Level 1/12 Main Street Zone 2
Level 2/12 Main Street

If you select the certificate to run from 12 Main Street, it will only show the zones pertaining to that Property. It will not include zones from any other tier.

Conditions

In order for application condition documents to be included with the applications themselves in the Section 7 document you must do the following:

Create an applications extract within Applications using CONDS - in the template of this document you must use the "includetext" and use the Application_Cond_Document with this includetext.

In the Property extract of either APLICTNS or ALLAPPL use your "CONDS" extract from applications to be associated with it.

Further to this when in the template document of your APLICTNS or ALLAPPL, you will also need to use the "includetext" of Application_Cond_Document. This will then ensure that property goes out to applications and adds any fields entered in the CONDS extract and the associated conditions documents.

Application Conditions
Application Conditions and their associated documents will appear against each separate Application. Expired Conditions will be excluded.

Property Conditions
Property Conditions, if using a Multi-tiered Property Structure, will drill down through the levels and include Conditions on all the sub properties.

If the Conditions are all of the same type, then these will only be reported once on the Certificate.

Office 2007 Certification

OVERVIEW
This document discusses noteworthy points with regards to Pathway Office 2007 certification. It discusses how Pathway uses Office 2007, what software changes occurred in Pathway and Pathway parameter configurations that may be influenced by Office 2007.

OFFICE 2007 INSTALLATION
Please note that Office 2007 must be installed on the Application Server to use Office 2007 with Pathway.

COMPATIBILITY MODE
The objective of this release of Pathway was to provide a similar experience on Word 2007 to Word XP. Since Office 2007 is not yet widely in use, we focused on maintaining interoperability between the different Word versions.
This has 3 important implications:
Files are not saved in .docx format, but in Word 97 – 2003 format.

Pathway uses Word 2007 in Compatibility Mode. This means that Word 2007 specific features are disabled in the interface and it also influence how some objects are managed internally. For a more detailed description on Compatibility Mode, see http://technet.microsoft.com/en-us/library/cc178998.aspx.

Interoperability between documents generated in different Word versions. Documents generated in Word 2007 will be readable by previous versions of Word and the other way around as well. Documents need not be transformed to make them work with this version of Pathway.

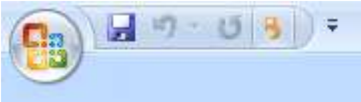
SOFTWARE CHANGES

New Template File
Pathway uses a different template file for Word 2007 from previous Word versions. This template must be installed on the Application Server for Pathway to use it.

New Thick Client 'Return To System' Action
When you view or edit a document or template, the Pathway thick client provides a Return menu to close the document, save it if required and return to the Pathway system. In previous Word versions, this Return menu was available on the menu bar:

Word 2007 doesn't use the concept of a menu any more. Menus have been replaced with ribbons. In Word 2007, the Return Action can be accessed from the Return Ribbon's return button (shown by the arrow):

For quick access, the return action has also been added to the 'Quick Access Toolbar':



The Return action is not applicable to the smart client, since the smart client automatically detects when Word closes.

PATHWAY PARAMETER CONFIGURATIONS

When using Office 2007, please check these 2 Pathway Parameters:

Applications Should Use Office Xp
In Word Processing >> Word Processing Parameters >> Product Application Maintenance, check that the applications that need to use Office 2007 are configured for 'Word for Windows (Office XP)'. Pathway uses the Office XP product code for both Office XP and Office 2007. It will use the version of Office that is installed on the PC.

Memos: Excel Path
In Memos >> Maintain Data Types, check that the XL2002 (Microsoft Excel 2002) Data Type's Executable File points toward the installed version of Excel under Office 2007. Typically this would be Program Files\Microsoft Office\Office12\excel.exe

Note that for Memo Excel attachments created with Excel 2007 there is no longer a Return to System menu customization. Save the attachment manually and close the workbook and minimize Excel or close Excel completely to return to the thick client. The smart client will continue to automatically detect when Excel is closed.

COMPATIBILITY MODE IN OFFICE 2007
Office 2007 has a range of new features, one of which is Compatibility Mode which allows backward compatibility between earlier versions of Microsoft Office. The full details can be viewed at the following link:

http://technet.microsoft.com/en-us/library/cc178998.aspx

The following is a summary of how Compatibility Mode works in Office 2007.

- Uses 2003 tools
- Files are fully editable in Word 2003
- Files created in Office 2007 are fully functional in Office 2003 (.doc, .xls, .ppt)
- Office 2007 can open and save files from previous versions without converting them to the new 2007 file formats
- Some features are limited in order to be consistent with previous versions
- Compatibility Mode is document specific and is auto enabled when files from Office 2003 or earlier are edited in 2007
- Provides visual cues to alert the user e.g. "(Compatibility Mode)" added to the title bar
- Can convert a Word 2003 document to Word 2007 (Office Start button>>Convert)

How to Use Relink.exe

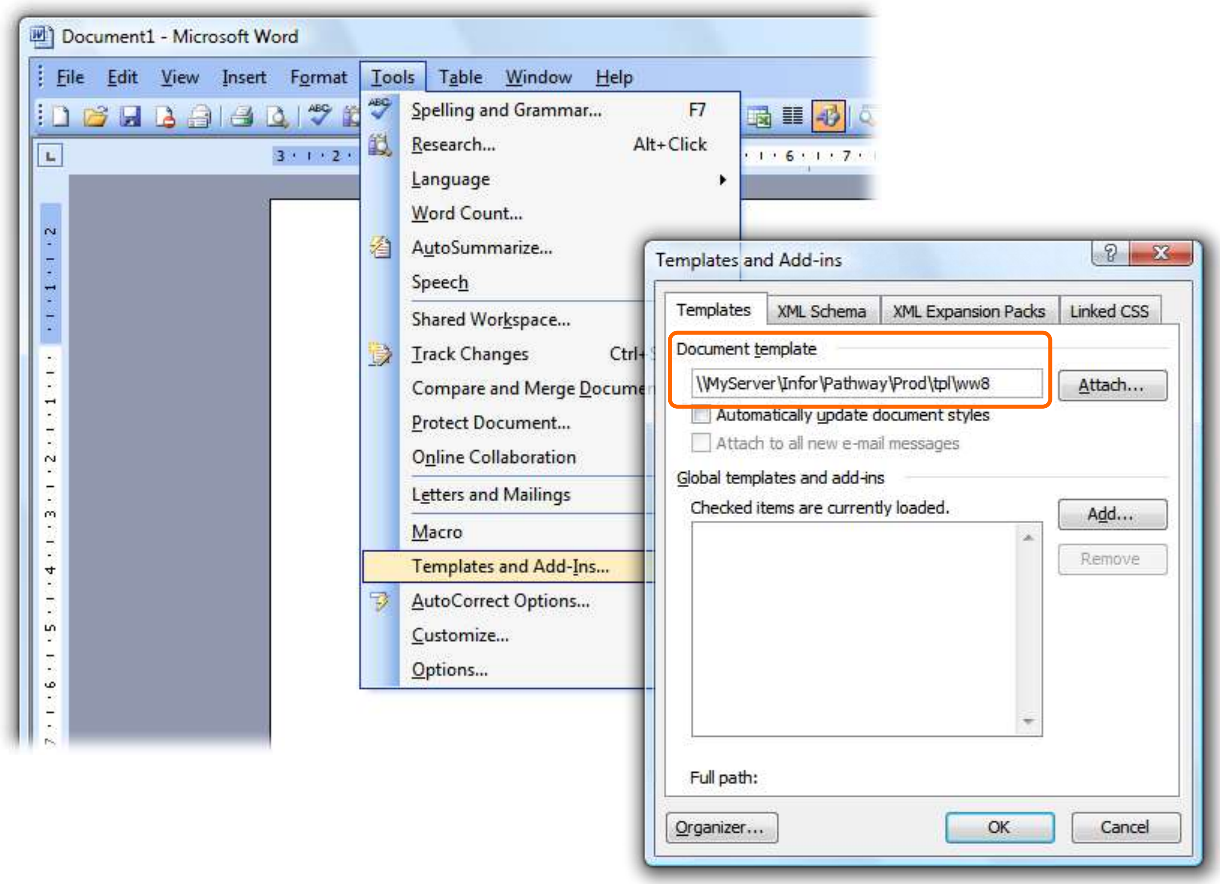
This document describes how to use the **Relink.exe** utility. Relink.exe replaces the Word document template in a large number of Word documents provided that the replacement path of the Word document template is exactly the same length as the existing path.

If the existing path in a Word document is found to be a different length then Relink.exe can be instructed to fallback to use Word to perform the re-link. However when this occurs it can significantly slow down the processing.

In general expect re-linking rates of between 20 and 100 documents per second. And expect re-linking rates using the fallback to Word of around 1 document per second.

Relink.exe will not update documents that are stored in document management systems such as Trim and DataWorks. It would be necessary to check-out all documents from the document management system beforehand, perform the re-link and then check-in the updated documents afterwards.

In Word 2003 the template linked to a Word document can be viewed using “Tools >> Templates and Add-Ins…”.

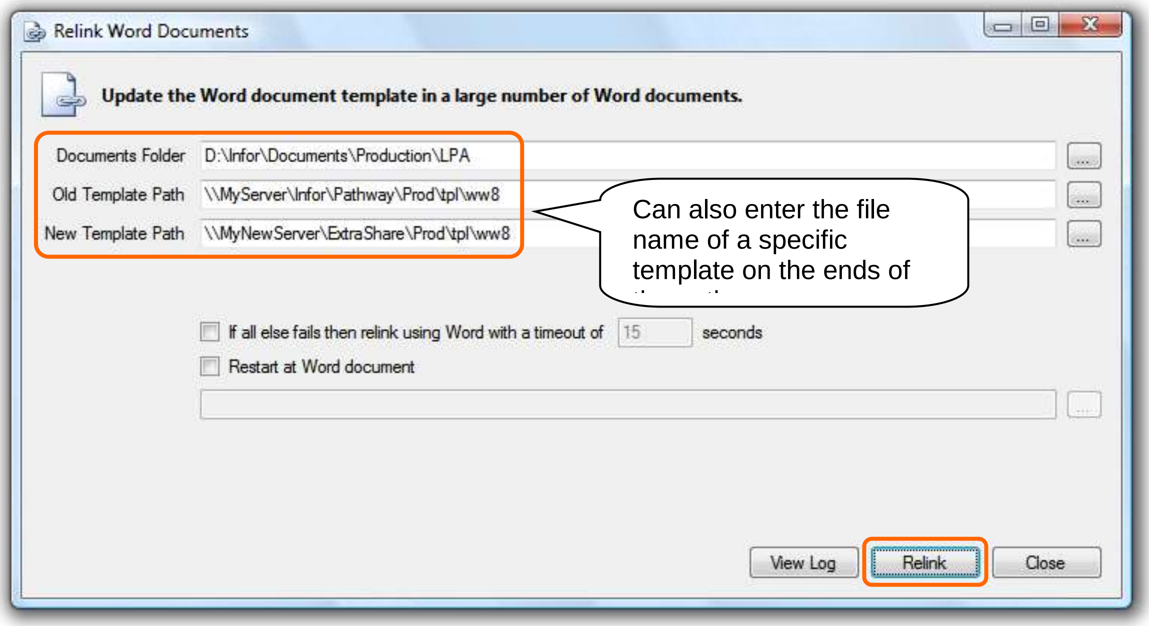


1. Double-click Relink.exe.

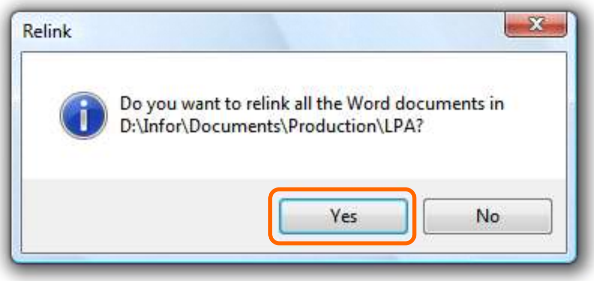
2. In the “Documents Folder” field enter the path of the folder which contains the documents. All documents in this folder and anywhere in the hierarchy of subfolders under this folder will be re-linked.

3. In the “Old Template Path” field enter the path of the folder containing the Word document templates to which the documents are currently linked. This folder typically contains doctype.dot, exttype.dot and mrgtype.dot.

4. In the “New Template Path” field enter the path of the folder containing the Word document templates to which the documents will be linked. This path must be the same length as the “Old Template Path”. Again, this folder typically contains doctype.dot, exttype.dot and mrgtype.dot.



5. Click the “Relink” button and then click “Yes”.



As documents are re-linked the form will be updated with progress information. Click Stop to stop the processing at any time and click the “View Log” button at any time to view messages being logged by the re-linking. The log file includes the paths of documents that are unable to be re-linked.

Tick the “Restart at Word document” checkbox and click the “Relink” button to restart processing at a particular document or subfolder (documents and subfolders are processed in alphabetical order).

Tick the “If all else fails then relink using Word” checkbox to fallback to Word if a particular document is unable to be re-linked in the first instance. This requires that Word is installed on the computer where Relink.exe is running.

Relink.exe is able to process documents quickly because it does not use Word. Instead it updates documents based on the compound file format specification and Word document format specification made available by Microsoft.

When Relink.exe encounters a document in a format that it cannot process it can fallback to using Word. For example, Relink.exe needs to fallback to using Word for RTF format documents, Word ML format documents and Open XML format (Word 2007 format) documents.

When re-linking using Word Relink.exe actually starts a separate process and instructs this to perform the re-link. The separate process can be seen in Task Manager as a second Relink.exe process. This isolates the main process from any crashes that may occur when operating on documents using Word. It also means that any unexpected dialogs displayed by Word will not halt the processing.

The value of the timeout (typically 15 seconds) determines how long the main Relink.exe process will wait for the second Relink.exe process when processing a document using Word. If this time limit is exceeded then the main process will assume that Word has either crashed or is sitting at an unexpected dialog. The second Relink.exe process will then be automatically killed and restarted. The problem will be reported in the log file and processing will continue at the subsequent document.

Relink.exe is a .NET 2.0 program and so requires that the Microsoft .NET 2.0 framework be installed on the computer where Relink.exe is run.

Note that Relink.exe can be used with any Pathway release level (including Pathway release 2.21).

Relink.exe and Relink.doc have been provided in the Pathway “msc” subfolder to improve the speed at which the “Return To System” template can be updated in all Word documents. It is still necessary to use the “Word Processing >> Batch Functions >> Document Update Control” thick client menu option to update data sources on template documents (however, this is typically relatively quick).

Relink.exe can only be used if the **length** of the path to the “Return to System” template has not changed.

For example, Relink.exe could be used if the path to the “Return to System” templates was previously \\SERVERONE\Share\Pathway\Prod\tpl\ww8 (38 characters long) and has now changed to \\SERVERTWO\Share\Pathway\Prod\tpl\ww8 (still 38 characters long). However, it could not be used if the new path was \\SERVERBACKUP\Share\Pathway\Prod\tpl\ww8 (41 characters long). A workaround would be to create a new share so that \\SERVERBACKUP\ExtraShare\Prod\tpl\ww8 is valid (38 characters long). Relink.exe could then be used (with the New Template Path specified as \\SERVERBACKUP\ExtraShare\Prod\tpl\ww8).

Relink.exe is a .NET 2.0 program and so requires that the .NET 2.0 framework be installed on the computer from which Relink.exe is run. Relink.exe will be faster if it is run on the computer hosting the Word documents.