

How to Use User Guide



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Pathway 3.09 (Thick Client Version)

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Basic Navigation Techniques

The following topics are covered in this section:

[Environment and Navigation](#)

[Getting Help](#)

[Scroll Bars](#)

[Shortcut Keys](#)

[Form Buttons](#)

[Icons/Glyphs](#)

[Deleting Records](#)

[Summary of Keys](#)

[Keyboard Templates](#)

Environment and Navigation

The Pathway product utilises a Graphical User Interface (GUI) methodology.

Each screen presented to you is called a form. You may use either your keyboard, mouse or a combination of the two, to enter data into a form.

A single mouse click on any button on the form will activate that button.

Double clicking on a record will move you forward through the system if appropriate i.e. for modification of a record. See the Zoom section later in the document for more information.

The Tab key may be used to move down and across the form as required. Holding the Shift key down and pressing the Tab key will take you in the reverse order through the form.

Where data is validated against a known list of values then those values may be called up using the popup button next to the field, or a drop down list.

When your cursor is moved to a field the field will change colour (depending on system setup) to indicate where the current focus is.

Getting Help

From any form presented you may retrieve on line help at any time either at the form level or the field level.

Opening Help at the Form level

To open the help file at the form level click on the Help menu item. Then select Form Help from the menu list. Alternatively press Shift F1 on the keyboard.

This will position you within the help file relative to the actual form open on your screen.

Opening Help at the Field level

To open the help file at the field level position your cursor in the appropriate field and either press F1 or select Help from the menu bar and Field Help from the menu list. This will present you with field help relative to the cursor position on your screen.

You may move around the help file as you wish, however closing or minimising the help screen will return you to Pathway and Strategy for Libraries at the same point as when you called up Help.

Opening the General Help file

This User Guide may be accessed on-line via the Help menu item. To open this document as on-line help select the "How to Use" item from the menu list.

Scroll Bars

Where more information is available than can be shown on the form a scroll bar will appear on the right hand side of the form.

Name	Address	Active
A V Jennings & Brothers	999 Nimboya Rd, MARINO SA 5049	<input checked="" type="checkbox"/>
Abbott, Brenton Stanley John William	1 Georgian Ave, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Fay	Etsa Corporation(D Franklin St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Fred Martin James	Etsa Corporation(D Franklin St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Gerald Mario	45 Appleby Crt, PARRAMATTA NSW 2150	<input checked="" type="checkbox"/>
Abbott, Jack Mark	10 Ingelby Rd, WARWICK QLD 2000	<input checked="" type="checkbox"/>
Abbott, Johnny	45 John St HAMILTON Auckland	<input checked="" type="checkbox"/>
Abbott, Nicole Leeanne Jennifer Lee	100 Waterman Crs, WAYVERLY NSW 1234	<input checked="" type="checkbox"/>
Abbott, Tom	2 Milton St, WARRADALE	<input checked="" type="checkbox"/>

Name Details

Communication Details
 Fax Number: 08 333 3333

Information Details
 Surveyor Rego NO BCC: 123 589 41
 Builder Licence No BCC: AD547

Document

New **Modify** **Close**

Name Selection Form

In the example above there are more names that may be viewed. By activating the scroll bar on the right hand side of the form the details of the form will be moved up or down accordingly.

The Scroll Bar may be activated using any of the following methods.

- ☐ By clicking on the arrow heads positioned at the top and bottom of the scroll bar.
- ☐ By holding down the Control Key on the keyboard and pressing the up arrow (↑) or the down arrow (↓) on the keyboard.
- ☐ Clicking within the shaded area of the Scroll Bar.
- ☐ Pressing Page Up or Page Down.

Shortcut Keys

Where a line is displayed under a letter on a function button then the keyboard may be used to activate that button. Holding down the Alt Key and pressing the appropriate letter will activate the button.

For example on the OK button the line is under the letter O. Hold down the Alt key and press O to activate this button.

Form Buttons

Standard Form Buttons are found on most forms in all applications. These buttons perform the same functions irrespective of the form or application.

OK Button



When activated the OK button will accept any data presented on the form, update the database and return you to the calling form.

The OK button is always positioned to the left of the cancel button in the bottom right hand side of the form. If there are space restrictions on the form or where the presentation does not suit then the button will be positioned on the vertical right hand side of the form.

The OK button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing O.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By pressing the F6 function key.

Cancel / Quit Buttons

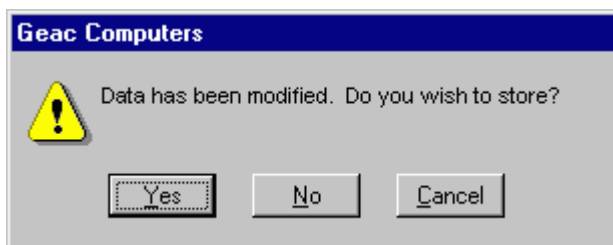


When activated the Cancel button will reject any changed data that has been entered on the form, optionally perform updates to the database and return you to the previous form.

The Cancel button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing C.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By pressing the F12 function key.
- ☐ By pressing the Escape (Esc) key.

If data has been changed on the form a message prior to exiting the form will be presented.



Cancel Data modification message

If Yes is selected the program will accept any data presented on the form, update the database and return you to the calling form. (Behaviour as per the OK button). Choose this response if Cancel was selected in error.

If No is selected the program will reject any changed data, no updates to the database are performed and return you to the calling form.

If Cancel is selected no action is taken and you will be returned to the form from which this message was called.

The Cancel button is always positioned in the bottom right hand corner of the form (see below).

To reject changes made to this form. Where changes have been made on previous forms, and not stored, the Quit button will perform a rollback operation

The Quit button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing Q.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By pressing the F12 function key.
- ☐ By pressing the Escape (Esc) key.

Continue Button

To continue processing, no changes will be stored until accessing a form with the OK button

The Continue button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing O.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By pressing the F6 function key.

New / Insert Buttons

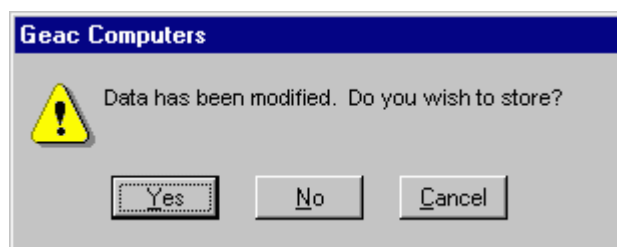


When activated a New record is presented for entry. A record is generated in the database if the form is accepted with the OK button.

The NEW button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing N.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By pressing the F9 function key.

If you create a new record within the system and exit the form via the Cancel button you will be prompted with the following message:-



By selecting No the record will not be stored in the data base.



The Insert Button functions in a similar manner to the New Button. The Insert Button is used on forms where multiple records may be created and maintained on a single form.

When activated a blank record is presented on the form for entry. A record is generated in the database if the form is accepted with the OK button.

The Insert button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing N.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By pressing the F9 function key.

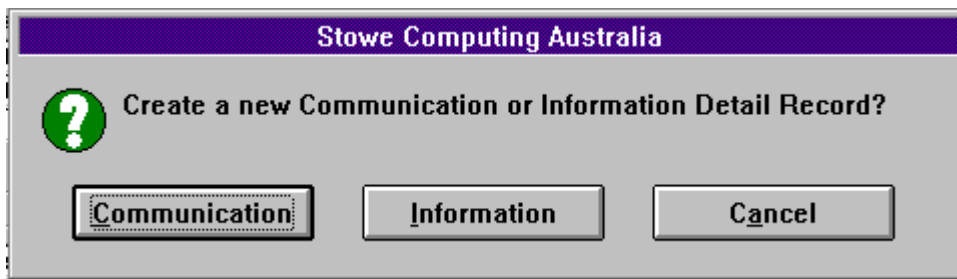
Where multiple record types are displayed on a single form then your cursor should be placed within the frame in which you need to insert a new record.

For instance in Name Maintenance three record types are displayed on the form, being the Name record, Communication Details and Information Details.

If you wish to add a Communication type then your cursor should be located within the communication frame.

If you wish to add an Information type then your cursor should be located within the information frame.

If your cursor is located within the name area e.g. on Surname then the system will prompt you and ask which record type you wish to create. In this example, only Communication and Information types may be added.

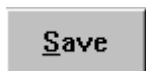


Create new date type message

Wherever there is doubt about the type of record you wish to add then you will be prompted with a message similar to that above.

If you insert a new record and exit the form via the Cancel button you will be prompted with the standard "Data has been modified" message.

Save Button



The Save Button is used on forms where significant data entry is done on the single form and the user wishes to periodically save any changes made to the data base without exiting the form.

The Save button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing S.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By pressing the F5 function key.

Select Button



The Select button is used to select the record that currently has focus (indicated by change of colour) and to pass that record through to the application that requires the data (usually when passing information through to another form or application).

For example in the Name and Address System the Component Qualifier Pop Up form allows the operator to choose (Select) a street component to pass back to the Component Maintenance form, e.g.



Example of use of Select Button

The Select button may be activated using any of the following methods.

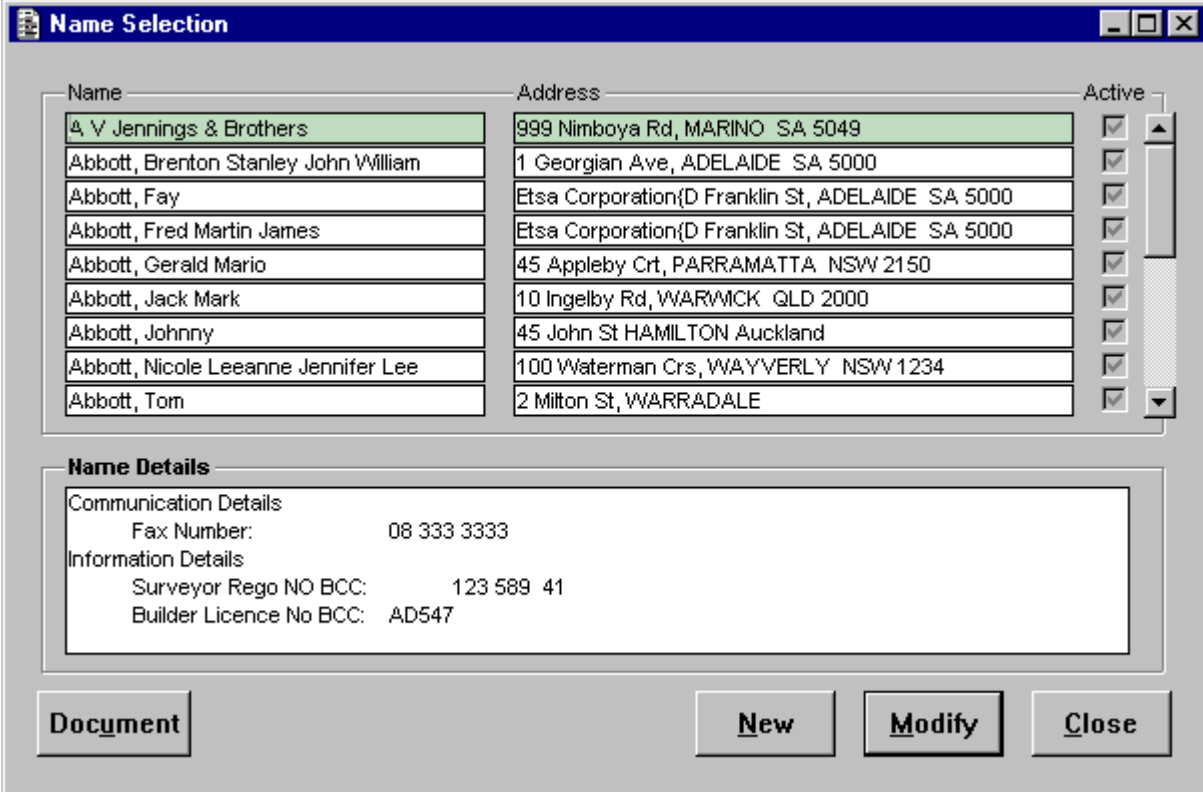
- ❑ By clicking on the button with your mouse.
- ❑ By holding down the Alt key and pressing S.
- ❑ By tabbing to the button and pressing the Enter key on the keyboard.

Modify Button



The Modify button is used to indicate that you wish to Modify the record that currently has focus.

For example in Name and Address Maintenance when a list of names is presented on a Selection Form put focus on the name record you wish to maintain (using the mouse or tab keys) and activate the Modify button.



Name	Address	Active
A, V Jennings & Brothers	999 Nimboya Rd, MARINO SA 5049	<input checked="" type="checkbox"/>
Abbott, Brenton Stanley John William	1 Georgian Ave, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Fay	Etsa Corporation(D Franklin St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Fred Martin James	Etsa Corporation(D Franklin St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Gerald Mario	45 Appleby Crt, PARRAMATTA NSW 2150	<input checked="" type="checkbox"/>
Abbott, Jack Mark	10 Ingelby Rd, WARWICK QLD 2000	<input checked="" type="checkbox"/>
Abbott, Johnny	45 John St HAMILTON Auckland	<input checked="" type="checkbox"/>
Abbott, Nicole Leeanne Jennifer Lee	100 Waterman Crs, WAYVERLY NSW 1234	<input checked="" type="checkbox"/>
Abbott, Tom	2 Milton St, WARRADALE	<input checked="" type="checkbox"/>

Name Details

Communication Details
Fax Number: 08 333 3333

Information Details
Surveyor Rego NO BCC: 123 589 41
Builder Licence No BCC: AD547

Document
New
Modify
Close

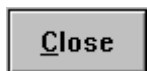
Select Form

Activating the Modify button would then take you to the Name and Address Maintenance form.

The Modify button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing M.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By double clicking on the appropriate record.

Close Button

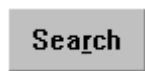


The Close Button is displayed on forms where no information may be modified. Activating this button will close the current form and return you to the previous form.

The Close Button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing C.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By pressing function key F12.
- ☐ By pressing the Escape key.

Search Button



The Search Button is found on Search Profile forms and will initiate a search on the data base based on the search criteria entered. See the “Search Profile Forms” Chapter for more information.

The Search button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing R.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By selecting Search, Perform Search from the Menu Bar.
- ☐ By holding down the Ctrl key and pressing R.

Process Button

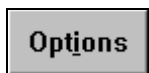


The Process Button is found on most Report Control forms, and, when selected, will display the Processing Options Maintenance Form which will initiate a report based on the details entered.

The Process Button may be activated by using any of the following methods:

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing P.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.

Options Button



The Options Button is found on most Report Control forms together with the Process Button, and, when selected, will display the Batch Job Options Form which allows the user to make a selection.

The Options Button may be activated by using any of the following methods:

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing I.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.

Select Button

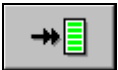


By pressing this button any component selected on the left side of the form is “moved” to the right hand side of the form and consequently “associated”.

The Select button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.

Select All Button



By pressing this button all components on the left side of the form are “moved” to the right hand side of the form and consequently “associated”.

The Select All button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.

Remove Button



By pressing this button any component selected on the right side of the form is “moved” to the left hand side of the form and consequently “unassociated”.

The Remove button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.

Remove All Button



By pressing this button all components on the right side of the form are “moved” to the left hand side of the form and consequently “unassociated”.

The Remove All button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.

Move Up Button



By pressing the Move Buttons, the sequence of the data may be changed. The column which is re-sequenced is the column which has the current focus.

For example, in the following form:

To move the Personal Information Types, ensure that one of the Personal Information Types is highlighted and use the Move arrows to re-sequence.

Personal Information Types	Company Information Types
Builder's Licence No	Council Areas
Employee Number	Line of Business
Council Areas	Builder's Licence No
Drivers License	Surveyor's Registrat. No
Surveyor's Registrat. No	Uniface 7
Uniface 7	

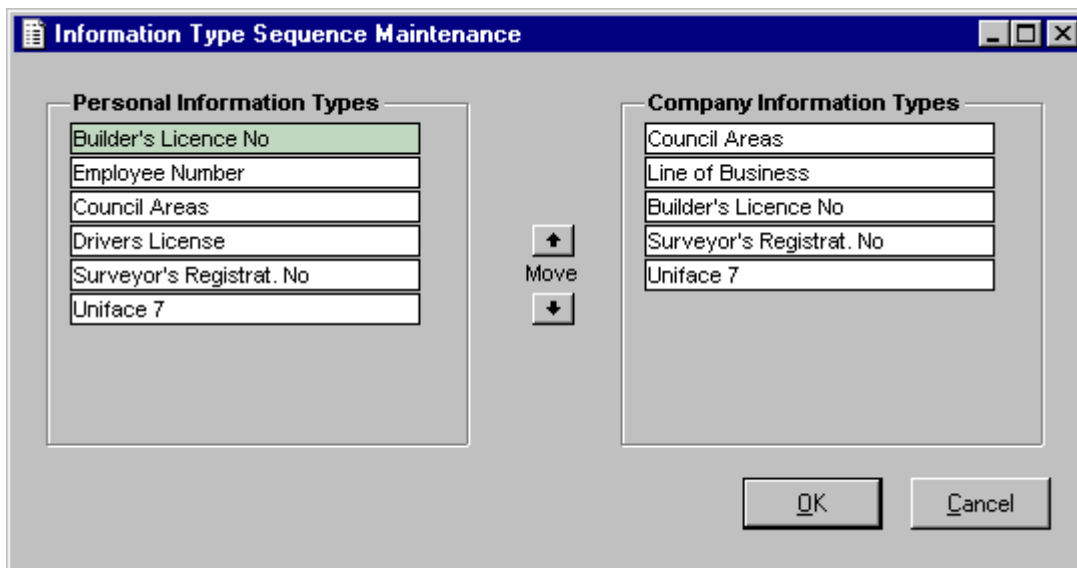
Move Down Button



By pressing the Move Buttons, the sequence of the data may be changed. The column which is re-sequenced is the column which has the current focus.

For example, in the following form:

To move the Personal Information Types, ensure that one of the Personal Information Types is highlighted and use the Move arrows to re-sequence.



The dialog box is titled "Information Type Sequence Maintenance". It contains two lists of information types. The "Personal Information Types" list on the left includes "Builder's Licence No" (highlighted), "Employee Number", "Council Areas", "Drivers License", "Surveyor's Registrat. No", and "Uniface 7". The "Company Information Types" list on the right includes "Council Areas", "Line of Business", "Builder's Licence No", "Surveyor's Registrat. No", and "Uniface 7". Between the lists are "Move" buttons with up and down arrows. At the bottom right are "OK" and "Cancel" buttons.

Personal Information Types	Company Information Types
Builder's Licence No	Council Areas
Employee Number	Line of Business
Council Areas	Builder's Licence No
Drivers License	Surveyor's Registrat. No
Surveyor's Registrat. No	Uniface 7
Uniface 7	

Move

OK Cancel

Detail Button



The Detail button is used to indicate that there is further information to be displayed or maintained in regard to the information to the left of the Detail button.

In the example below (taken from the Name & Address system) further detail is available on each of the lines displayed in the Application Information Details frame.

Name Details	
Formatted Name	Burnsdale Village
Formatted Address	34 Aloha Ave, CAMDEN PARK SA 5038

Application Information Details		
Parent	Bakers Delight	...
Parent	Balloons Gallore	...
Occupier	103 Isabelle Terrace, ADELAIDE SA 5000	...
Ratepayer	426 (4) 11 Manamana Boulevard, DERNANCOURT SA 5075	...

Search Profile
Role Type: Green White Red

Application Role Maintenance Form

The Detail button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.

Popup Button



A popup button will be displayed where a list of valid data is applicable to the field.

The Popup button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By pressing F2 on the field.
- ☐ By double clicking on the field.

A popup form will be displayed from which you may select the value to be inserted into the field. Below is an example of the title popup form from the Name and Address System. In the example below by activating the popup button on the Name title field the Name Title Popup form is displayed.

The screenshot shows a 'Personal Name Maintenance' window. It contains several sections: 'Personal Name Details' with fields for Surname (Anderson), Given Names (Chole), Title (with a popup button), Gender (Female), and others; 'Communication' section; and 'Information Data' section. A 'Name Title Pop Up' dialog box is open over the Title field. This dialog box has a list of titles: Drs, Lady, Master, Miss, Mr, Mrs, Ms, Prof, Sir. To the right of the list are buttons for 'Retrieve', 'Select', and 'Cancel'. At the bottom of the dialog is a 'Retrieve Profile' section with a text input field. The main form has buttons for 'Roles', 'Address', 'New', 'OK', and 'Cancel' at the bottom.

Pop Up Form

By placing your cursor on the appropriate code and activating the Select button (or double clicking on the field) that code will be loaded into the appropriate field on the maintenance form.

All popup forms have a Retrieve Profile at the bottom of the form. Please refer to the Chapter on Search Profiles which will explain how to use these fields.

Activating Cancel will close the popup and return you to the originating form without passing any data.

Valid data need not be selected from the Popup form. If the data is known to the operator it may be entered directly into the field. If the data entered does not appear in the list of valid data then the Popup form will be automatically displayed.

Drop Down List



Drop Down lists are used to display valid data choices when a popup form is not required. This is usually where the number of choices is less than 7.

The Dropdown button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By starting data entry in the field.

The list of available data will be displayed below the current field.

The screenshot shows a window titled "Personal Name Maintenance". It contains three sections: "Personal Name Details", "Communication Details", and "Information Details". In the "Personal Name Details" section, the "Gender" field has a dropdown menu open, displaying the options "Female", "Male", and "Unknown". The "Male" option is currently selected. Other fields in the section include Surname (Abbott), Given Names (Brenton Stanley John William), Title (Mr), Deceased (checkbox), Date of Birth (01-Jan-1970), Mailing Salutation (B S J W Abbott), Person Name Type, and Formatted Address (1 Georgian Ave, ADELAIDE SA 5000). At the bottom of the window are buttons for Roles, Address, Insert, OK, and Cancel.

Drop Down list Example

Select from the list by clicking on the appropriate value or entering the first character of a valid choice from the list.

Where values are known they may be entered into the field directly. In the example above by typing M into the field the system will automatically load Male into the field.

Zoom

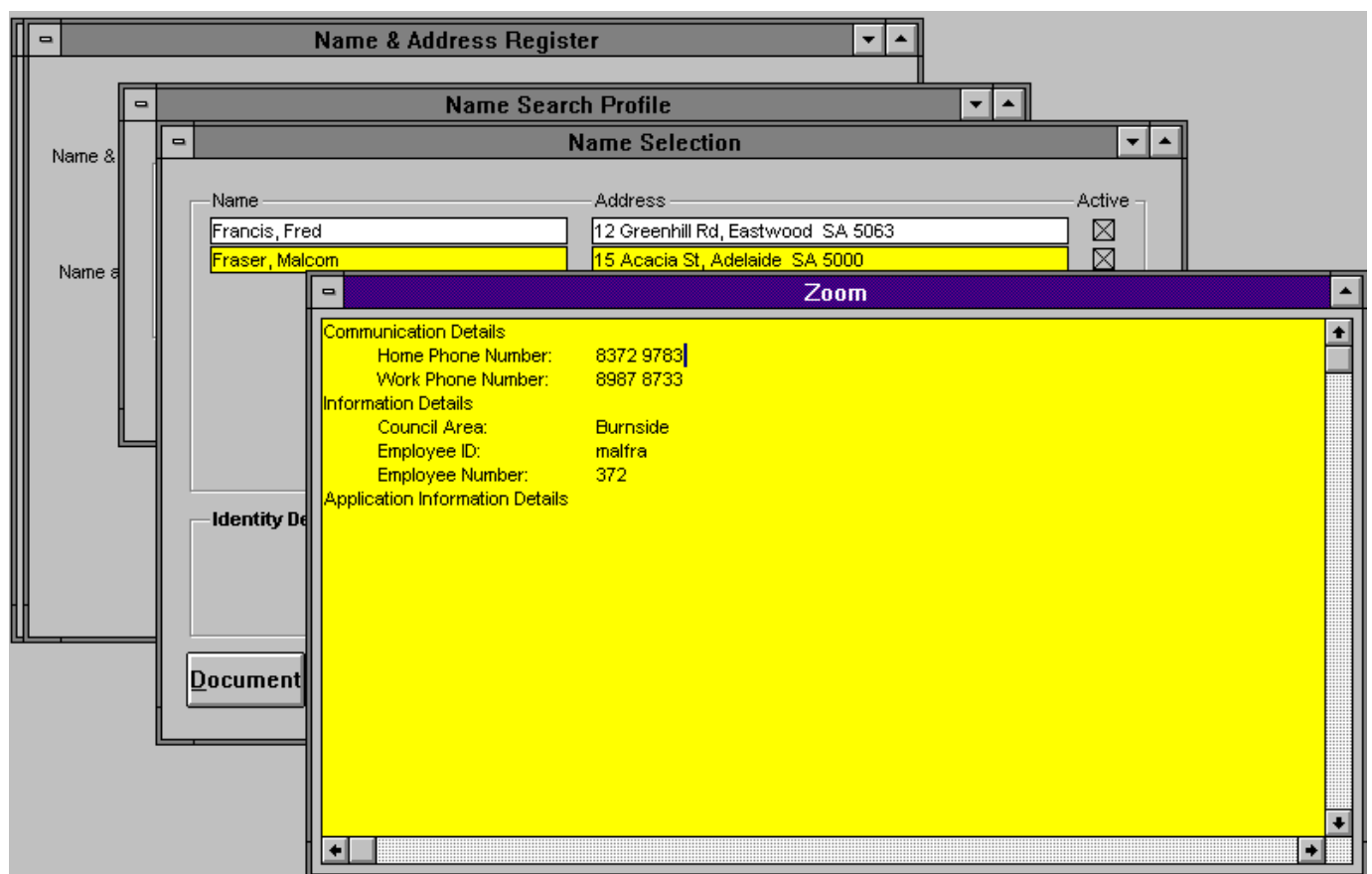
Double clicking on a field may activate the Zoom facility depending on the function of the form. In some cases double clicking may activate the Modify function.

Zoom is helpful if a text field contains more information than can be displayed on the form. Zoom may also be selected from the menu bar :-

View Zoom OR
View Quick Zoom

Quick Zoom will display the field in full page mode.

Shown below is an example of double clicking on the Name Details field on the Name Selection form within the Name and Address system.



Zoom Example

The Zoom window may be closed using any one of the following methods.

- ☐ Press escape
- ☐ Press F3
- ☐ double click on the control menu.
- ☐ click on the control menu in the top left hand corner of the zoom window and select close.
- ☐ Select CTRL A or F6 to accept changes (if in entry mode).

Lodgement Button

Selecting this button will take the user to the Application Service Selection form where further options are available to allow further actions to be taken

Property Services Selection

Property Address
 "Rutland House", 4 Cole Street, Clapham SA 5068 Current

Collection Summary

Sub-Property Count	1	Total Services	2	Waste Type Container	1	No. of Services	1
				No Container Type	1	No. of Services	1

Static Summary

Total Services	2	A	1	No. of Services	1
		Adel1	1	No. of Services	1

Service	Reference	Collection	Assessment Status
"Rutland House", 4 Cole Street, Clapham SA 5068			
Service: ADEL1 - Adelaide Service Code 1			Current
Service: ADEL4 - Adelaide Service Code 4			Current
Service: A - Recycle Bin (service code A - static)			Current
Lot DP 5548			

☐ Include Sub-Properties

Property Services Selection form

Application Services Button

Selecting this button will take the user to the form Property Services Applications where they can add a New or Modify a Service.

Property Services Selection

Property Address
 "Rutland House", 4 Cole Street, Clapham SA 5068 Current

Collection Summary
 Sub-Property Count 1 Total Services 2 Waste Type Container 1 No. of Services 1
 No Container Type 1 No. of Services 1

Static Summary
 Total Services 2 A 1 No. of Services 1
 Adel1 1 No. of Services 1

Service	Reference	Collection	Assessment Status
"Rutland House", 4 Cole Street, Clapham SA 5068			
Service: ADEL1 - Adelaide Service Code 1			Current
Service: ADEL4 - Adelaide Service Code 4			Current
Service: A - Recycle Bin (service code A - static)			Current
Lot DP 5548			

☐ Include Sub-Properties

Lodgement Application Services MapInfo Rate Type New Modify Close

Property Services Selection form

New Property Service Button

Using this button will take the user to the Service Maintenance form which will allow them to add a new service.

Application Service Selection

Property Details "Rutland House", 4 Cole Street, Clapham SA 5068
 Status Current

Available Services
 A Recycle Bin (service code A - static)
 ADEL4 Adelaide Service Code 4

Assigned Services
 ADEL1 Adelaide Service Code 1

Search Profile
 Service Code
 Description

Search New Property Service Lodge Cancel

Application Service Selection form

Lodge Button

Using this button will take the user to the Class/Type Selection form which will allow them to add a new Application.

Application Service Selection

Property Details: "Rutland House", 4 Cole Street, Clapham SA 5068
Status: Current

Available Services

A	Recycle Bin (service code A - static)
ADEL4	Adelaide Service Code 4

Assigned Services

ADEL1	Adelaide Service Code 1
-------	-------------------------

Search Profile

Service Code:
Description:

Search New Property Service Lodge Cancel

Application Service Selection form

Icons / Glyphs

Icons can be found on most Summary or Maintenance forms for the following Modules:-

- Animals
- Applications
- Customer Service Requests
- Debtors
- Infringements
- Licensing
- Property
- Rates
- Trade Waste
- Victorian Valuations

When present they inform the User of available links to these modules. The User is able to double click on the Icon and the Link will be displayed for selection.

Customer Service Requests Links



Where a Customer Service Request has been linked to the relevant record – eg Rate Assessment, Infringement Ticket Application etc the ‘smiley face’ icon is displayed on the summary form for that Module. The Icon will only be displayed where links exist.

When Users double click on the ‘smiley face’ icon they are presented with the Module’s Selection form to allow the User to select the required link.

Using the Icon is the same as using either the Options Button or the Options Dropdown function. Additionally where a User attempts to access the displayed Icon but they do not have authority to access the module, they will be notified that they do not have that authority.

The Customer Service ‘smiley face’ Icon will appear on the following Summary / Maintenance forms:-

- Animals Maintenance Form
- Application Summary Form
- Debtors Summary Form
- Infringement Summary Form
- Licensing Summary Form
- Property Summary Form
- Rates Summary Form

Property Links



Where a Property has been linked to the relevant record – eg Rate Assessment, Infringement Ticket Application etc the ‘house’ icon is displayed on the summary form for that Module. The Icon will only be displayed where links exist.

When Users double click on the ‘house’ icon they are presented with the Module’s Selection form to allow the User to select the required link.

Using the Icon is the same as using either the Options Button or the Options Dropdown function. Additionally where a User attempts to access the displayed Icon but they do not have authority to access the module, they

will be notified that they do not have that authority.

The Property 'house' Icon will appear on the following Summary / Maintenance forms:-

- Animals Maintenance Form
- Application Summary Form
- Customer Request Maintenance Form
- Debtors Summary Form
- Infringement Summary Form
- Licensing Summary Form
- Rates Summary Form
- Trade Waste Summary Form
- Victorian Valuations Summary Form

Register Links



Where a Register record has been linked to the relevant record – eg Rate Assessment, Infringement Ticket Application etc the 'keys' icon is displayed on the summary form for that Module. The Icon will only be displayed where links exist.

When Users double click on the 'keys' icon they are presented with the Module's Selection form to allow the User to select the required link.

Using the Icon is the same as using either the Options Button or the Options Dropdown function. Additionally where a User attempts to access the displayed Icon but they do not have authority to access the module, they will be notified that they do not have that authority.

The Register 'keys' Icon will appear on the following Summary / Maintenance forms:-

- Animals Maintenance Form
- Application Summary Form
- Customer Request Maintenance Form
- Debtors Summary Form
- Infringement Summary Form
- Licensing Summary Form
- Property Summary Form
- Rates Summary Form

Related Application



Where an Application record has been linked to the relevant record – eg Application or Licence the 'green documents' icon is displayed on the summary form for that Module. The Icon will only be displayed where links exist.

When Users double click on the 'green documents' icon they are presented with the Module's Selection form to allow the User to select the required link.

Using the Icon is the same as using either the Options Button or the Options Dropdown function. Additionally where a User attempts to access the displayed Icon but they do not have authority to access the module, they will be notified that they do not have that authority.

The Related Application 'green documents' Icon will appear on the Application or Licensing Summary form.

Related Licence



Where a Licence record has been linked to the relevant record – eg Application or Licence the ‘blue documents’ icon is displayed on the summary form for that Module. The Icon will only be displayed where links exist.

When Users double click on the ‘blue documents’ icon they are presented with the Module’s Selection form to allow the User to select the required link.

Using the Icon is the same as using either the Options Button or the Options Dropdown function. Additionally where a User attempts to access the displayed Icon but they do not have authority to access the module, they will be notified that they do not have that authority.

The Related Licence ‘blue documents’ Icon will appear on the Application or Licensing Summary form.

Deleting Records

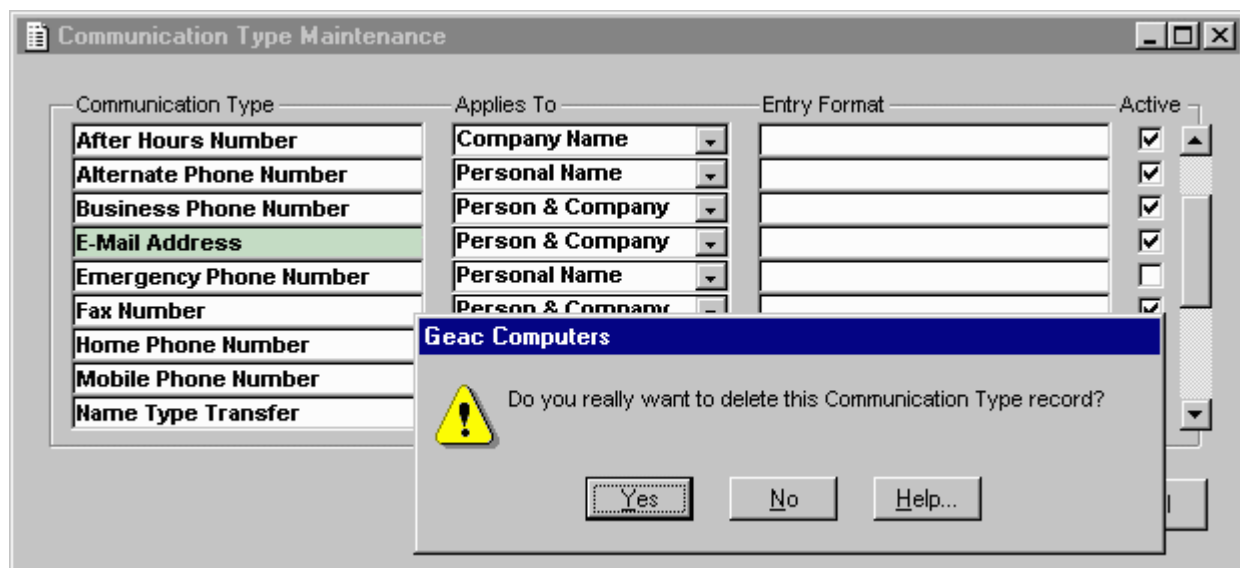
Records may be deleted from the system (subject to authority) from any General Form.

To delete a record, access the record you wish to delete.

The Delete function may be activated using any of the following methods.

- ☐ By pressing the F11 function key.
- ☐ By selecting Edit, Delete from the menu bar.
- ☐ Pressing the Delete Button (where available).

For example to delete a Communication Type parameter, click on the Communication Type you wish to delete and then activate the Delete function (using one of the methods described above).



Delete Message

In this example the E-mail address Communication Type was selected for deletion. Once the delete function is activated the system responds with the message shown above.

Respond Yes to the message to delete the record.

Respond No to the message to cancel the delete process.

The system will not allow you to delete a record where that record is being used by other records. In the example above, if any Name records are using the E-mail address Communication Type then the Delete function will return with a message advising that other records are dependent on this record.

In this case the E-mail address Communication Type should be made Inactive by checking off the Active Flag. By making the record Inactive it will no longer be available for use and will not display in any Popup forms. All existing records that are using this Communication Type will remain unaffected.

Summary of keys

The following represents a summary of the various command keys. For more information please refer to the appropriate section within this manual.

Function	Button	Keyboard Shortcut	Function Key	Menu Option
Accept Input	OK	Alt O	F6	
Cancel Input	Cancel	Alt C	F12 or Escape	
Close Form	Close	Alt C	F12 or Escape	
Clear Data from Form		Ctrl G	F7	Search, Clear Search Profile
Delete Record			F11	Edit, Delete
Fast Exit to First Form			F4	File, New Search
Fast Exit to Menu			F3	File, Exit
Field Zoom				View, Zoom or View, Quick Zoom
Go to Menu Bar		Alt (then the first character of the menu item)	F10	
Help – Field			F1	Help, Field Help
Help – Form			Shift F1	Help, Form Help
Help – General				Help, How to Use
Modify Record	Modify	Alt M		
New Record	New	Alt N	F9	Edit, New
Save Changes	Save	Alt S	F5	File, Save
Search	Search	Alt R Ctrl R	F8	Search, Perform Search
Select Record	Select	Alt S		
Show Detail	PopUp		F2	
Turn Flag On/Off		Space bar Ctrl D	F2	

Caution

On some operating system platforms keyboard function keys may be “mapped” to perform other functions.

For example F2 could be “mapped” to start “File Manager”. If any function keys have been mapped in this manner it will override the function key assignment described above.

If function keys are not behaving as expected please contact your supervisor.

Keyboard template

The following list represents the standard keyboard functions that are issued with this product. This keyboard template is user definable and your site may remove or add keyboard functions.

Keyboard combination	Function performed
Backspace	Deletes character to the left of the cursor
Tab	Tabs to next field
Shift Tab	Tabs to previous field.
Enter key	Normal Enter
Keypad Enter	Normal Enter
Escape	Quit
Delete Key	Delete character
Shift Delete	Cut selected text
Keypad Delete	Delete character
Keypad Shift Delete	Cut selected text
Insert Key	Insert character
Shift Insert	Paste
Ctrl Insert	Copy
Keypad Insert	Insert character
Shift Keypad Insert	Paste
Ctrl Keypad Insert	Copy
End key	Go to end of line
Shift End	Select to end of line
Keypad End key	Go to end of line
Shift Keypad End	Select to end of line
Down Arrow	Down one line
Shift down Arrow	Select down one line
Ctrl Down Arrow	Next Occurrence
Alt Down Arrow	Next Occurrence
Keypad down arrow	Down one line
Shift keypad down arrow	Select down one line
Ctrl keypad Down Arrow	Next occurrence
Page Down	First occurrence in next window
Keypad Page Down	First occurrence in next window
Left Arrow	Move cursor one position to left
Shift Left Arrow	Selects one character to the left
Ctrl Left Arrow	Move cursor one word to the left
Shift Ctrl Left Arrow	Selects one word to the left
Keypad Left Arrow	Move cursor one position to left
Shift Keypad Left Arrow	Selects one character to the left

Keyboard combination	Function performed
Ctrl keypad left arrow	Move cursor one word to the left
Shift Ctrl Keypad Left Arrow	Selects one word to the left
Right Arrow	Move cursor one position to right
Shift Right Arrow	Selects one character to the right
Ctrl Right Arrow	Move cursor one word to the right
Shift Ctrl Right Arrow	Selects one word to the right
Keypad Right Arrow	Move cursor one position to Right
Shift Keypad Right Arrow	Selects one character to the right
Ctrl Keypad Right Arrow	Move cursor one word to the right
Shift Ctrl Keypad Right Arrow	Selects one word to the right
Home key	Move cursor to beginning of line
Shift Home	Select to beginning of line
Keypad Home key	Move cursor to beginning of line
Shift Keypad Home	Select to beginning of line
Up Arrow	Move cursor up one line
Shift Up Arrow	Select up one line
Ctrl Up Arrow	Previous occurrence
Alt Up Arrow	Previous occurrence
Keypad Up Arrow	Move cursor up one line
Shift Keypad Up Arrow	Select up one line
Ctrl Keypad Up Arrow	Previous occurrence
Page Up	First occurrence in previous window
Shift Page Up	First occurrence
Keypad Page Up	First occurrence in previous window
Shift Keypad Page Up	First occurrence
F1 key	Field Help
Shift F1 key	Form Help
F2 key	Detail on field
F3 key	Exit
F4 key	New Search
F5 key	Save
F6 key	OK
F7 key	Clear
F8 key	Retrieve
F9 key	Add occurrence
F10 key	Go to Menu Bar
F11 key	Remove occurrence
F12 key	Quit
Ctrl A	OK
Ctrl B	Make text bold

Keyboard combination	Function performed
Ctrl C	Copy text to clipboard
Ctrl D	Detail on field
Ctrl E	Clear data from form
Ctrl G	Clear Search Profile
Ctrl H	Initiate Field Help
Ctrl I	Make text italics
Ctrl J	Used to compose other characters (e.g. subscript characters etc)
Ctrl L	Go to Menu Bar
Ctrl M	Display message frame
Ctrl P	Initiate Print form
Ctrl Q	Quit form
Ctrl R	Perform retrieve
Ctrl U	Underline text
Ctrl V	Paste text from clipboard
Ctrl X	Cuts text to clipboard
Ctrl Z	Zoom field

Search Profiles

The following topics are covered in this section:

[Overview](#)

[Search Profile Forms](#)

[Pop Up Forms](#)

[Advanced Profile Techniques](#)

Overview

When enquiring on or maintaining data within the system the following methodology has been used.

Search Profile ➔ Selection Form ➔ General Form
Form

Search Profile Form

Used to enter values on which to base your search. This could be a persons name (or part of), an Assessment Number, an address and so on. This is referred to as the Search Profile. After entry of the search criteria the Search Button is then activated. Search Profiles are also available on Popup forms.

Selection Form

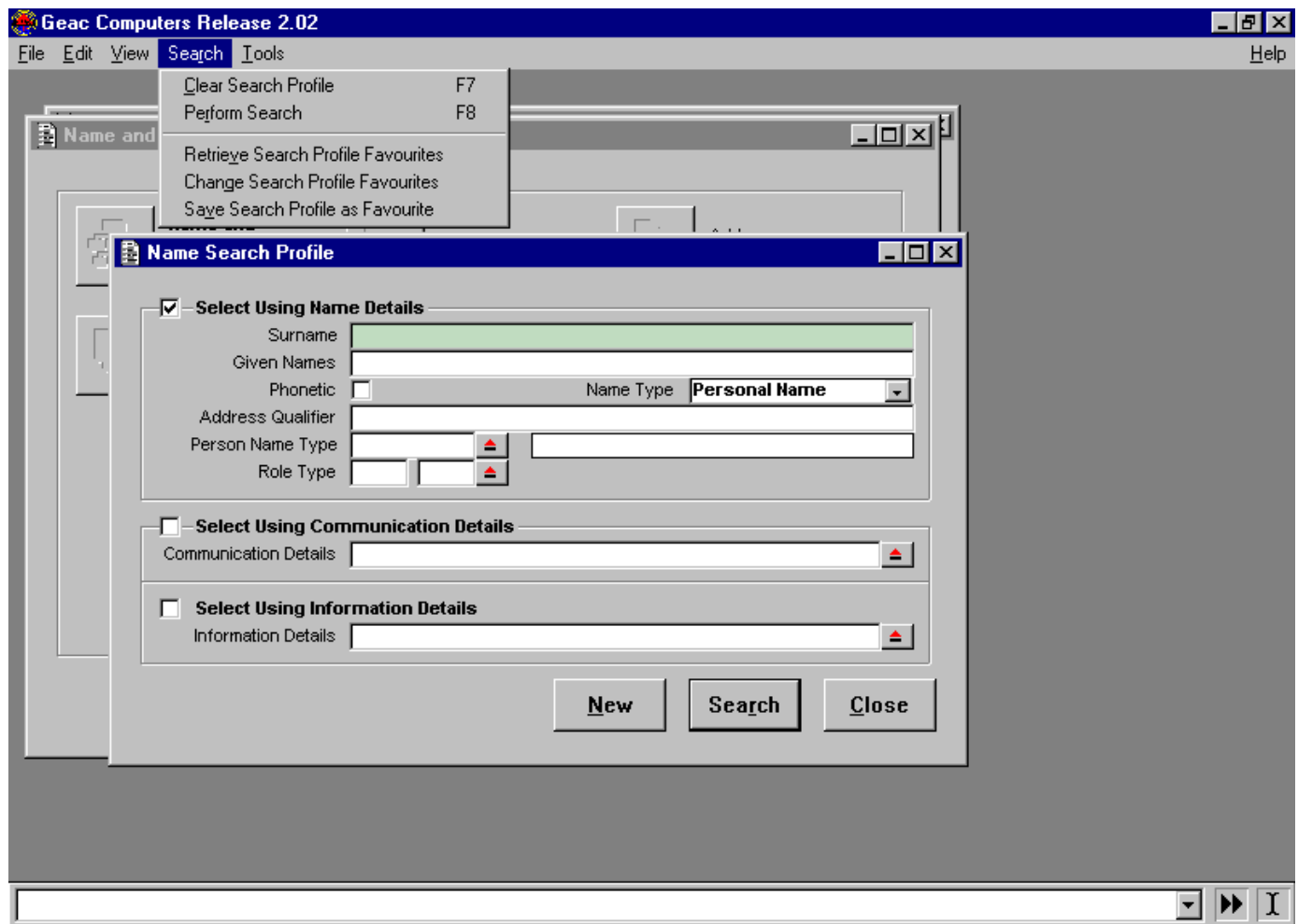
The system will display all records matching the Search Profile. If only one record matches the Search Profile then this form is bypassed. From the Selection Form you can view a lot of information regarding the records found. Click on the record on which you wish to display more information. In the window at the bottom of the form more detail will be displayed.

General Form

This form type allows maintenance and enquiry of records.

Search Profile Forms

The Name and Address Search Profile form will be used as an example of searching on records.



Search Profile Form

This form is used to search for names within the Name and Address system.

If we were looking for all names starting with S then S* (S asterisk) would be placed in the Surname field. By selecting the Search button all name records with a surname beginning with S would be displayed.

The Search button may be activated using any of the following methods.

- ☐ By clicking on the button with your mouse.
- ☐ By holding down the Alt key and pressing R.
- ☐ By tabbing to the button and pressing the Enter key on the keyboard.
- ☐ By pressing the F8 function key.

We could narrow the selection even further by typing in G* in the Given Names field. This would retrieve all name records whose surname starts with S and first name starts with G e.g. Geoff Stephens.

The system will only return those records that match all data entered in the Search Profile.

Candidate Key (Unique field)

A Candidate Key is a field which contains unique data in each record (i.e. No two records will contain similar

data in this field, eg. each record will have a different receipt number). If there is a Candidate Key on a Search Profile form then when a search is performed using data in this field, the search disregards the other entries in the Search Profile. This overriding feature allows a user to enter a unique value, and the search will return only one record. The other fields on the form do not need to be cleared.

Search Menu Options

Save Search Profile as Favourite

This option is available from the Search Menu. It allows a search to be saved for future use.

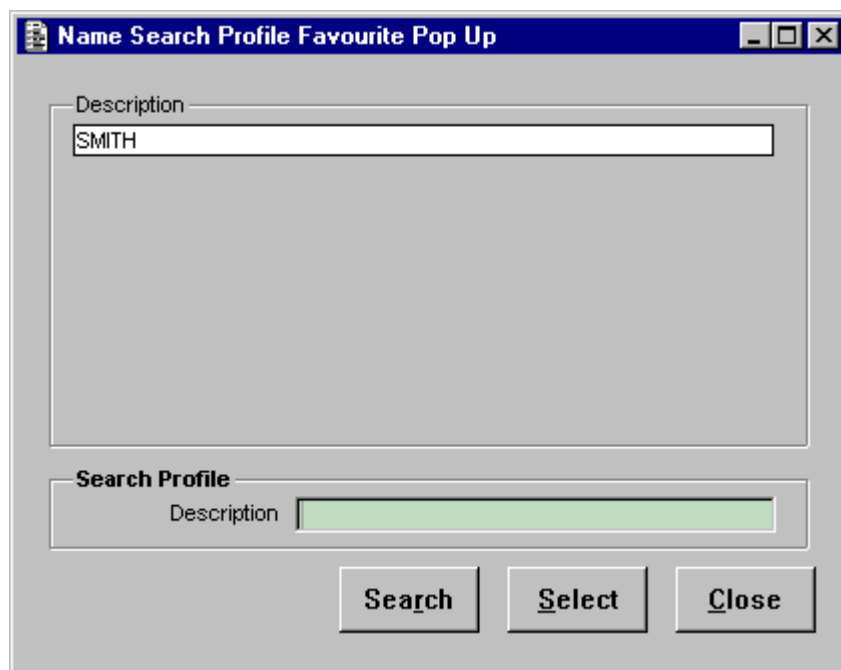
Change Search Profile Favourites

This option is available from the Search Menu. It allows a saved search to be modified.

Retrieve Search Profile Favourites

This option is available from the Search Menu. It allows a saved search to be retrieved and used for a current search.

Name Search Profile Favourite Pop Up



Name Search Profile Favourite Pop Up Form

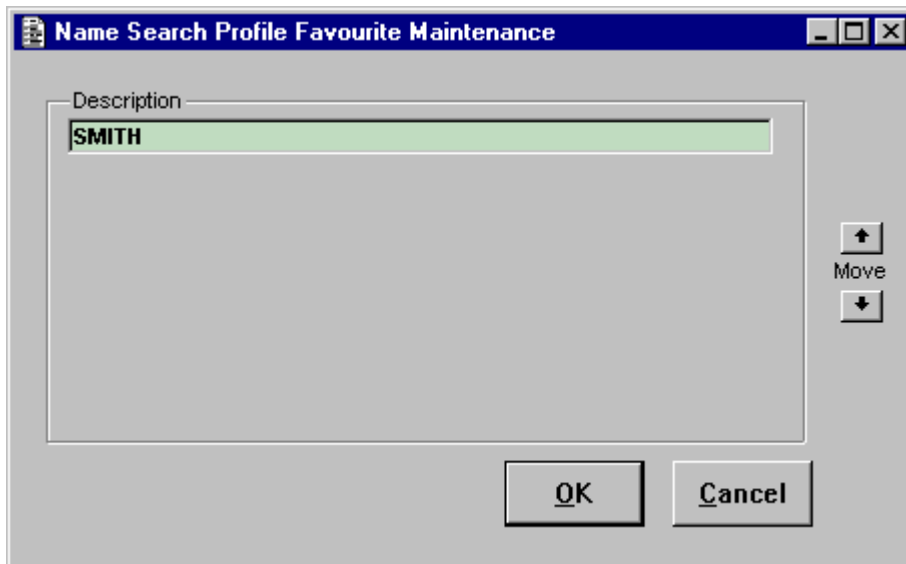
Description

This field displays a description of saved search favourites from which to select.

Search Profile - Description

This field allows entry of a saved search profile favourite on which to search.

Name Search Profile Favourite Maintenance Form

A screenshot of a Windows-style dialog box titled "Name Search Profile Favourite Maintenance". The dialog has a blue title bar with standard window controls. Inside, there is a text area labeled "Description" containing the word "SMITH" in all caps. To the right of the text area are two arrow buttons (up and down) with the label "Move" between them. At the bottom of the dialog are two buttons: "OK" and "Cancel".

Name Search Profile Favourite Maintenance Form

Description

This field displays A list of Search Profile Favourites which can be maintained.

Direct Match Option

The Direct Match option in the Options Menu is available on Property Search forms. It enables an exact match to be performed when conducting a search, e.g. Entering 17 in the House Number field and checking this option on will ensure that only those House Numbers that match exactly will be retrieved.

Geac Computers Testing

File Edit View Search Tools **Options**

Property Search Profile Direct Match

☒ **Select Using Address Details**

House Number - >> (any) Unit Number >>
 Street >> Level Number >>
 Suburb >> Include Primary ☒ Include Alternate ☒ Include Historic ☐
 Post Code

☐ **Select Using Name Details**

Role Type **Property Owner**
 Surname
 Given Names

☐ **Select Using Property Details**

Property Name (any)
 Property Key Assessment No.
 Group Code >> Service Reference No. Service Code **(any)**

☐ **Select Using Parcel Details**

Parcel Type **(any)** Parcel Number Block Use Address ☐
 Plan Type **(any)** Plan Number Section

☐ **Select Using Property Reference**

Reference Type >>
 Reference Number

☐ **Select Using Title Details**

Title Prefix **(any)**
 Volume Folio

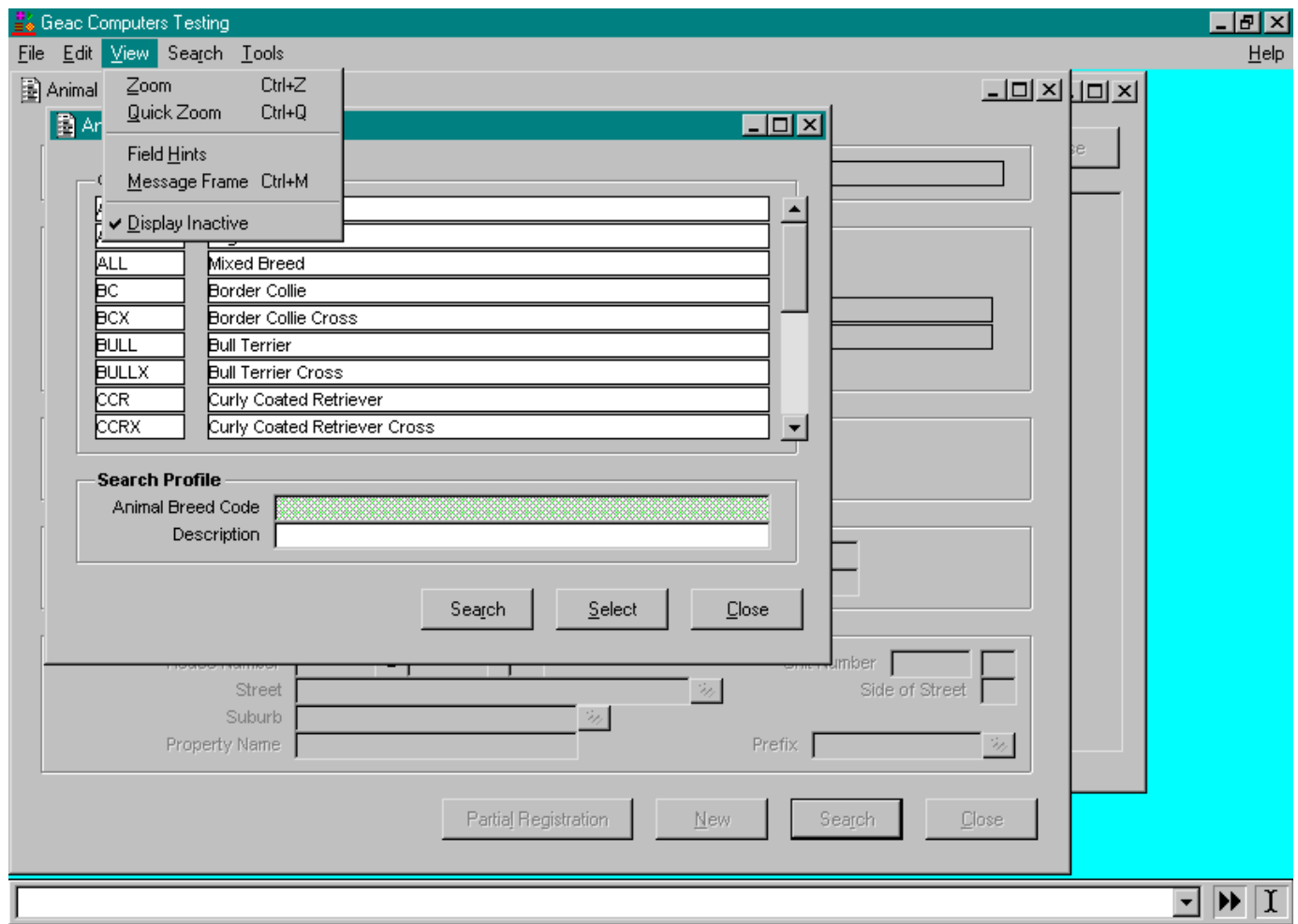
Status **(any)** ☒ Land
 Council **Stowe Test Council** ☒ Base
 Property Type **(any)** ☒ Building
☒ Occupancy

MapView New Search Close

Direct Match Option

Pop-Up Forms

The Animal Breed Pop-Up is used in this example.



Pop-Up Form showing the 'Display Inactive' Option

This form is used to display Animal Breeds that are available for use within the Animal Maintenance function.

If we were looking for a particular Animal Breed then the required Breed Code could be selected from this form to enable searching only on the nominated Breed.

Pop-Up forms default to only show Active entries, however it is possible to display Inactive occurrences.

Inactive occurrences can be displayed by using the following method.

1. Select the View Button
2. Select Display Inactive

A tick will be placed against the Display Inactive option.

Upon returning to the Pop-Up form both Active and Inactive occurrences will be displayed.

Note: The displaying of Inactive occurrences is only effective for the Pop-Up displayed at the time of switching on the Display Inactive flag. Any other Pop-Up or reselection of the original Pop-Up will default back to only displaying Active occurrences.

Advanced Profile Techniques

The system will allow certain operands to be used within the Search Profile.

The operands are:-

*	Zero through to <i>n</i> characters	(Not available on numeric fields)
?	Any single character	(Not available on numeric fields)
=	Equals	
>	Greater Than	
<	Less Than	
!	Not	
&	And	
	Or	

Example One

To retrieve all surnames beginning with S but NOT Smith then the following would be entered into the Surname field. `S*&!SMITH`

Example Two

To retrieve all surnames beginning with BO but NOT surnames beginning with BOW then the following would be entered into the Surname field. `BO*&!BOW*`

Example Three

To retrieve all surnames beginning with BA or BO the following would be entered into the Surname field. `BA*|BO*`

Example Four

To retrieve all surnames whose first two characters are EV, the next character is unknown, and the last two characters are NS the following would be entered into the Surname field. `EV?NS`

This could, for example, return the surnames Evans, Evons, Evins, Evens

Example Five

To retrieve all surnames starting with B or E but not Brown then the following would be entered into the Surname field.

`B*|E*&!BROWN`

Example Six

To retrieve all surnames that contain the letters B and E anywhere in the string then the following would be entered into the Surname field. `*B*&*E*`

Example Seven

For date fields the following entry would retrieve all records that match the date range greater than 1st December 1996 and less than 31st December 1996

`>01-12-96&<31-12-96` etc.

Selection Forms

The following topics are covered in this section:

[Selection Forms](#)

[Multi-Select Forms](#)

[Select/Remove Forms](#)

Selection Forms

The selection form is used to display all records that have satisfied the retrieve profile on the previous form.

Each selection form displays appropriate data according to the type of application you are using. For instance in the Name and Address system the selection form shows the name and default address details.

Name	Address	Active
A. V. Jennings & Brothers	999 Nimboya Rd, MARINO SA 5049	<input checked="" type="checkbox"/>
Abbott, Brenton Stanley John William	1 Georgian Ave, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Fay	Etsa Corporation(D Franklin St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Fred Martin James	Etsa Corporation(D Franklin St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Gerald Mario	45 Appleby Crt, PARRAMATTA NSW 2150	<input checked="" type="checkbox"/>
Abbott, Jack Mark	10 Ingelby Rd, WARWICK QLD 2000	<input checked="" type="checkbox"/>
Abbott, Johnny	45 John St HAMILTON Auckland	<input checked="" type="checkbox"/>
Abbott, Nicole Leeanne Jennifer Lee	100 Waterman Crs, WAYVERLY NSW 1234	<input checked="" type="checkbox"/>
Abbott, Tom	2 Milton St, WARRADALE	<input checked="" type="checkbox"/>

Name Details

Communication Details	
Fax Number:	08 333 3333
Information Details	
Surveyor Rego NO BCC:	123 589 41
Builder Licence No BCC:	AD547

Document **New** **Modify** **Close**

Selection Form

A scroll bar will appear on the right hand side of the form if there is more data than can be shown in the window.

From a selection form various functions are available (depending on the application). In the example shown above you may choose to:-

- ☐ Create a new Name and Address record (press the New button)
- ☐ Modify an existing record (highlight the record you wish to modify and press the Modify button)
- ☐ Close the form and return to the previous form (Press Close)
- ☐ Link to word processing (Press the Document button)

Multi-Select Forms

A Multi-Select Form is used where the function being performed provides the ability to select more than one record that appears on the list.

Drawer ID	Signed On	Receipts From	Receipts To
0P	<input checked="" type="checkbox"/>	2399	2400
1	<input type="checkbox"/>	0	2611
10	<input type="checkbox"/>	1121	1838
15	<input checked="" type="checkbox"/>	220	2648
150	<input type="checkbox"/>	225	1049
187	<input checked="" type="checkbox"/>	1241	1255
1AA	<input type="checkbox"/>	582	1063
1B	<input checked="" type="checkbox"/>	594	2390
2	<input type="checkbox"/>	0	0

Processing Options

☒ Update and Report ☐ Report Only
☐ Report on payment details
☐ Receipt Dissection
☐ Bank Account Summary

Options Process Cancel

Example of a multi-select Form

When records are selected the occurrence on the form will be displayed in a different colour. The colour for selected records is established at the system parameter level.

There are two ways to select multiple records on the form.

Method 1 - Individual records

To select individual records on the list hold down the Control key and click on each of the records that you wish to select. Records selected in error may be “de-selected” by clicking on them again.

Method 2 - A block of records

To select a block of records on the list, click on the first (or last) record, hold down the shift key and click on the last (or first) record. This will highlight the entire block.

Individual records may then be removed from the selected list by holding down the Control key and clicking on the records not required.

Select/Remove Forms

Select/Remove forms are used where there is a requirement to select multiple records for inclusion in a list.

This type of form is generally used within a parameter establishment function.

Assign Application Parameter Options

Class Details

Description: Development Applications

Available

- Dimension
- Miscellaneous Data
- Application Fee
- Contribution Plan Fees
- Decision
- Authority
- Rejection Reason
- Consent Group
- Consent

Assigned

- Processing Group
- Status
- Reference

Move

OK Cancel

Select/Remove Form

In the example above various parameter items on the left side of the form are selected using the Select Button and “moved” to the right side of the form. Once the form is accepted only those parameter items selected will be available to the system.

General Forms

The following topics are covered in this section:

[Using General Forms](#)

[Types of Fields](#)

Using General Forms

Forms used to maintain data are referred to as General Forms.

From a general form you may:-

- ☐ Create new data
- ☐ Amend existing data
- ☐ Delete records
- ☐ Execute functions

General forms (where used in maintenance mode) will always give you the option to accept your changes or to cancel any changes you have made.

There are three types of General Forms.

- ☐ Single occurrence General Forms
- ☐ Multiple occurrence General Forms
- ☐ Extended multiple occurrence General Forms

Single Occurrence General Form example

An example of a Single occurrence General form is the Personal Name Maintenance form within the Name and Address System. This type of form contains one main data record which may be maintained.

Personal Name Maintenance

Personal Name Details

Surname	Abbott		
Given Names	Brenton Stanley John William		
Title	Mr	Gender	Male
Deceased	<input type="checkbox"/>	Private	Female
Date of Birth	01-Jan-1970	Active	Male
Mailing Salutation	B S J W Abbott		Unknown
Person Name Type			
Formatted Address	1 Georgian Ave, ADELAIDE SA 5000		

Communication Details

Information Details

Roles Address Insert OK Cancel

Single occurrence General Form

This particular general form will allow you to:-

- ☐ Display Name Role associations (by choosing the Roles button)
- ☐ Maintain/Enquire on Application Address details (by choosing the Address button)
- ☐ Add new Communication & Information Details (by choosing the New button)
- ☐ Accept any changes you have made (by choosing the OK button)
- ☐ Cancel any changes you have made (by choosing the Cancel button)
- ☐ Delete a Name record via the File Delete menu option

Multi Occurrence General Form example

An example of a Multiple occurrence General Form is the Name Title parameter form. On this form you can create and maintain multiple records on the same form, each on a single line.

Title	Active
Brother	<input checked="" type="checkbox"/>
CAPTAIN	<input type="checkbox"/>
Captain	<input checked="" type="checkbox"/>
Count	<input type="checkbox"/>
Doctor	<input type="checkbox"/>
Dr	<input type="checkbox"/>
Father	<input checked="" type="checkbox"/>
Honorable	<input checked="" type="checkbox"/>
Lady	<input checked="" type="checkbox"/>

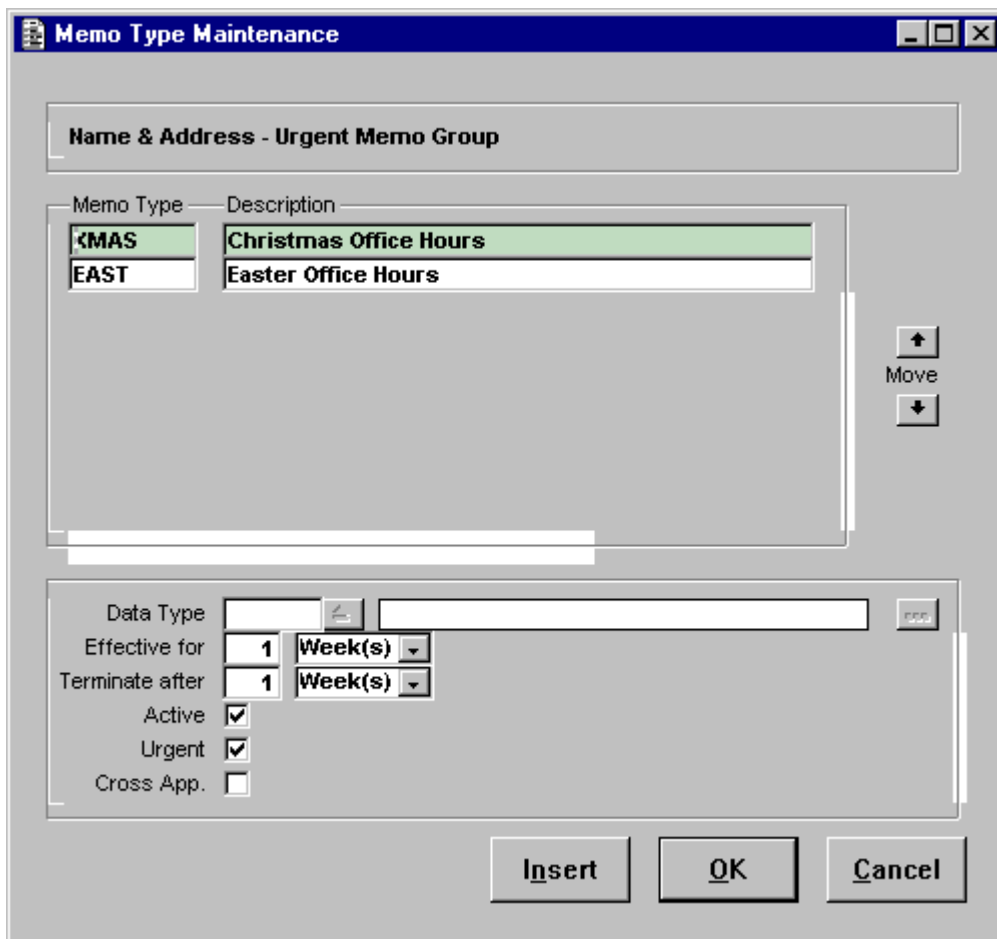
Buttons: Insert, OK, Cancel

Multi-occurrence General Form

Extended Multi Occurrence General Form example

An example of an Extended Multi Occurrence General Form is the Memo Type Maintenance Form. On this form multiple records may be maintained.

The form is split into two significant portions, the top half being a "Selection" type form and the bottom half being the maintenance portion. As focus is gained on the record in the top half of the form, the fields associated with that record is displayed on the bottom portion.



The **Memo Type Maintenance** dialog box is used to manage memo types. It features a title bar with standard window controls. Below the title bar is a section labeled **Name & Address - Urgent Memo Group**. The main area contains a table with two columns: **Memo Type** and **Description**. The table lists two entries: **CMAS** with description **Christmas Office Hours**, and **EAST** with description **Easter Office Hours**. To the right of the table are two arrow buttons labeled **Move** for reordering. Below the table is a section for configuration options: **Data Type** (with a dropdown and a button), **Effective for** (set to 1 **Week(s)**), **Terminate after** (set to 1 **Week(s)**), and checkboxes for **Active** (checked), **Urgent** (checked), and **Cross App.** (unchecked). At the bottom are **Insert**, **OK**, and **Cancel** buttons.

Memo Type	Description
CMAS	Christmas Office Hours
EAST	Easter Office Hours

Data Type: [] [] []
Effective for: 1 Week(s)
Terminate after: 1 Week(s)
Active: ☒
Urgent: ☒
Cross App.: ☐

Insert OK Cancel

Extended Multiple Occurrence General Form

Types of fields

Alpha-numeric field

This field type may contain any letters, numbers or special formatting characters.

Numeric field

This field type may only contain numbers.

Date/Time field

This field type may only contain data in a date or date and time format.

A date may be entered manually or function key F2 (or double click) may be used. Function key F2 will either populate the field with today's date or, depending on the application in use, display the calendar for selection of a date and/or time.

Query by Form

The following topic is covered in this section:

[Query by Form](#)

Query by Form

Where a Search Profile form is not provided the Query by Form function may be used.

 This function is only available on General Forms where more than one record is displayed.

This function enables you to restrict the display to only those records you are interested in.

Query by Form is **not** available on the following form types:-

- ☐ Search Profile Form
- ☐ Selection Form
- ☐ Single Occurrence General Form

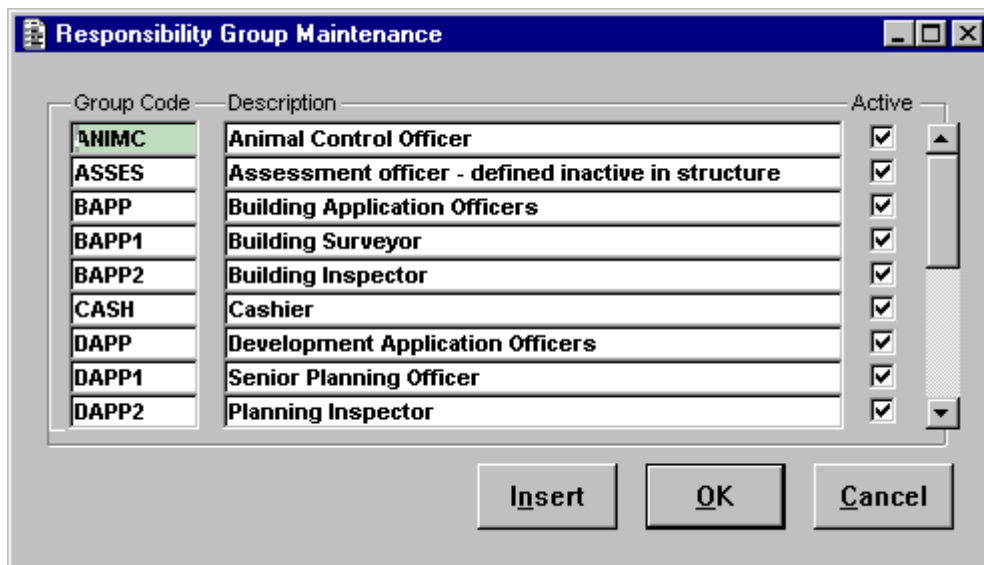
The procedure for executing a Query by Form are:-

- ☐ Open the form.
- ☐ Clear the form (Search, Clear Search Profile) or (Ctrl G)
- ☐ Enter the required search criteria.
- ☐ Perform the retrieve (Search, Perform Search) or (Ctrl R)

Example of Query By Form

In this example we will use the Responsibility Group Maintenance Form. This is a multiple occurrence general form which means Query by Form is available.

- ☐ Step 1 - Open the form



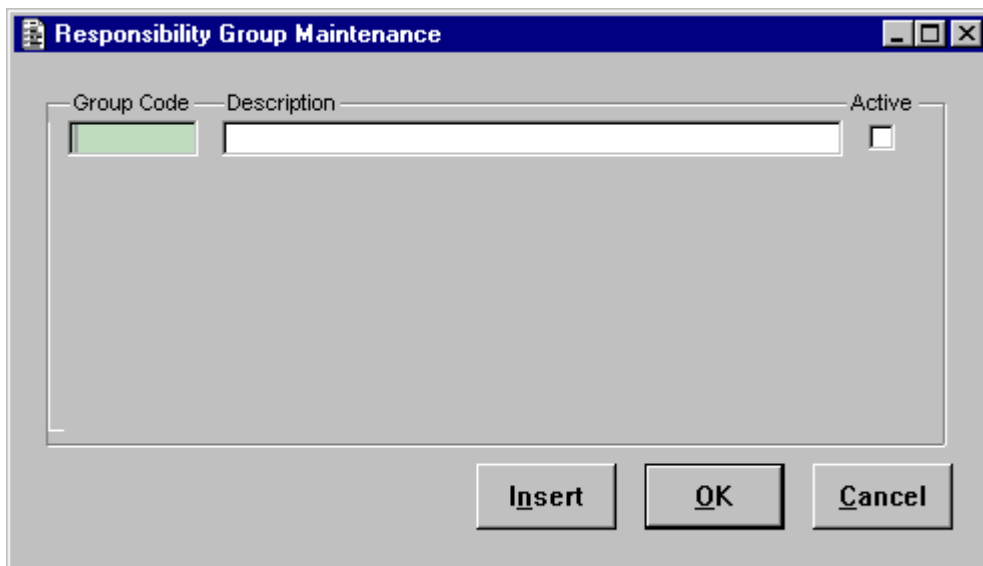
Group Code	Description	Active
ANIMC	Animal Control Officer	<input checked="" type="checkbox"/>
ASSES	Assessment officer - defined inactive in structure	<input checked="" type="checkbox"/>
BAPP	Building Application Officers	<input checked="" type="checkbox"/>
BAPP1	Building Surveyor	<input checked="" type="checkbox"/>
BAPP2	Building Inspector	<input checked="" type="checkbox"/>
CASH	Cashier	<input checked="" type="checkbox"/>
DAPP	Development Application Officers	<input checked="" type="checkbox"/>
DAPP1	Senior Planning Officer	<input checked="" type="checkbox"/>
DAPP2	Planning Inspector	<input checked="" type="checkbox"/>

Step in Query by Form Example

- ☐ Step 2 - Clear the form in preparation for entry of the Search Criteria.

Select Search, Clear Search Profile from the menu bar or alternatively press Ctrl G.

This function will remove all data from the form. Please note this function does not remove data from the data base.



The screenshot shows a window titled "Responsibility Group Maintenance". Inside, there is a table with three columns: "Group Code", "Description", and "Active". The "Group Code" column has a green background. Below the table are three buttons: "Insert", "OK", and "Cancel".

Step in Query by Form Example

- ❑ Step 3 - Enter the criteria by which you wish to retrieve the data.

In the example below we have input the word Manager into the Responsibility Group Description field. Because we have used the asterisk wild-card this will retrieve all records that have the word Manager somewhere in the description. Full wild-card searching is available with this function. See "Advanced Profile Techniques" for more information.

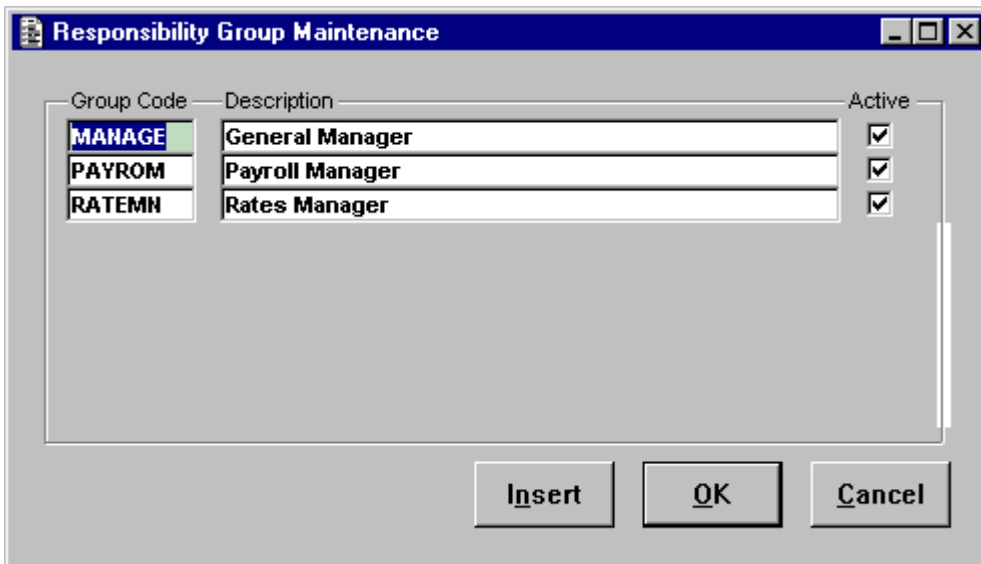


The screenshot shows the same "Responsibility Group Maintenance" window. The "Description" field now contains the text "*Manager*". The "Group Code" field is empty. The "Active" checkbox is unchecked. The "Insert", "OK", and "Cancel" buttons are still present at the bottom.

Step in Query by Form Example

- ❑ Step 4 - Perform the Search.

Select Search, Perform Search from the menu bar or alternatively press Ctrl R. The results of this search are displayed below.



The image shows a Windows-style dialog box titled "Responsibility Group Maintenance". It contains a table with three columns: "Group Code", "Description", and "Active". The table lists three entries: "MANAGE" (General Manager), "PAYROM" (Payroll Manager), and "RATEMN" (Rates Manager). All "Active" checkboxes are checked. Below the table are three buttons: "Insert", "OK", and "Cancel".

Group Code	Description	Active
MANAGE	General Manager	<input checked="" type="checkbox"/>
PAYROM	Payroll Manager	<input checked="" type="checkbox"/>
RATEMN	Rates Manager	<input checked="" type="checkbox"/>

Step in Query By Form Example

Maintenance may now be performed on the retrieved records. All other records previously displayed remain unaffected by the Query by Form.

User Defined Fields

The following topics are covered in this section:

[Creating User Defined Fields](#)

[Using User Defined Fields](#)


Creating User Defined Fields

Overview

Within the system there is the ability to create fields as required where no appropriate field exists to cater for the data.

The ability to create these fields is restricted to those users with the appropriate security level.

 Caution should be exercised when creating User Defined Fields. These fields and any associated data are not available in any forms or standard reports generated by the system.

 User Defined Fields are created against a particular component of a record. For example in Name and Address Maintenance there are three main data types on the form, the Name, Communication Details and Information Details. Your cursor must be located on the correct data type. For instance, to create a User Defined Field against the Name your cursor must be located in the name data type area e.g. on the Surname field. It is recommended that you always position the cursor on the first field within the data type that you wish to attach the User Defined Field to.

Field types available are :-

Text fields only
Image fields only
Both Text and Image

Textual fields may be validated against a predefined list of valid data. In addition, an entry format may be defined for textual fields.

The User Defined fields function is accessed from the “Associated” menu item. Selecting the “Fields” item will enable you to establish and maintain user defined fields.

If no user defined fields exist then you will be presented with the User Defined Fields Layout Maintenance form. If user defined fields already exist you will be presented with the User Defined Fields Maintenance Form, at this point you should choose the Setup button to access the Layout form.

To maintain User Defined fields that are of a type “Image” select the Images/Objects item from the “Associated” menu item.

User Defined fields Layout Maintenance form

This form is used to establish user defined fields.

Press the Insert Button to create a new user defined field.

Field Name	Type	Validate	Entry Format	Setup	Load
Date Started	Text	<input type="checkbox"/>	DATE		
Conduct	Text	<input checked="" type="checkbox"/>		...	
Photo	Image	<input type="checkbox"/>			<input type="checkbox"/>
Employees House	Image	<input type="checkbox"/>			<input type="checkbox"/>
Weekly Hours	Text	<input type="checkbox"/>	####		
General Comments	Text	<input type="checkbox"/>			

Buttons: Insert, OK, Cancel

Create User Defined Fields Form

Field Name

Enter the description of the User Defined Field. This field description will be displayed to the user when entering data.

Type

Select the data type from the drop down list box. The following data types are available:-

- ☐ Text
- ☐ Image
- ☐ Both (Text & Image)

Validate

This is a check box type field. It will only be displayed if the data type for the user defined field is Text.

If the check box is switched on then the user is restricted to data that is established in a predefined list. See the User Defined Values Maintenance form.

If the check box is not switched on then the user may enter any alphanumeric data (subject to formatting rules).

Entry Format

This field is only displayed if the data type for the user defined field is Text. If no input mask is required then leave this field blank.

This field determines what input and validation is required by the system. The following input masks are available:-

Mask Entry

Description

DATE

This mask will force the user to enter a valid date in the field.

#

This mask will force the user to enter a numeric value in each position designated in the mask.
e.g. ##.## will force an entry of 2 significant digits, a point and two fractional digits. For example 37.26

*

An asterisk in this field allows any alpha-numeric input.

?

Indicates that the field requires the entry of a single

alphanumeric character. For every question mark in the Entry Format field the user is required to enter a character. For example ??? requires the input of 3 alphanumeric characters.

(Any other alpha numeric character)

If any other character is placed in the Entry Format field then that character is required. For example if the entry format is ?A? then the user is required to enter a single alphanumeric character, followed by an A, followed by another single alphanumeric character. e.g. BAG. The characters entered here are case sensitive.

The masks may be used in combination with each other (except for the date mask).

e.g.

##, A* The user must input two numbers, a comma, an A and any other characters.

Setup Button

If the Validate Field has been checked on, activating this button will take you to the User Defined Values Maintenance form to establish the valid data for the user defined field.

Load

This field is only available with user defined fields that are of a type "Image".

By checking this box on, the image that the user selects will be copied and stored within the data base. No editing of the image is allowed if the image is stored within the database.

By leaving this check box blank, the system will "link:" to the image file selected by the user.

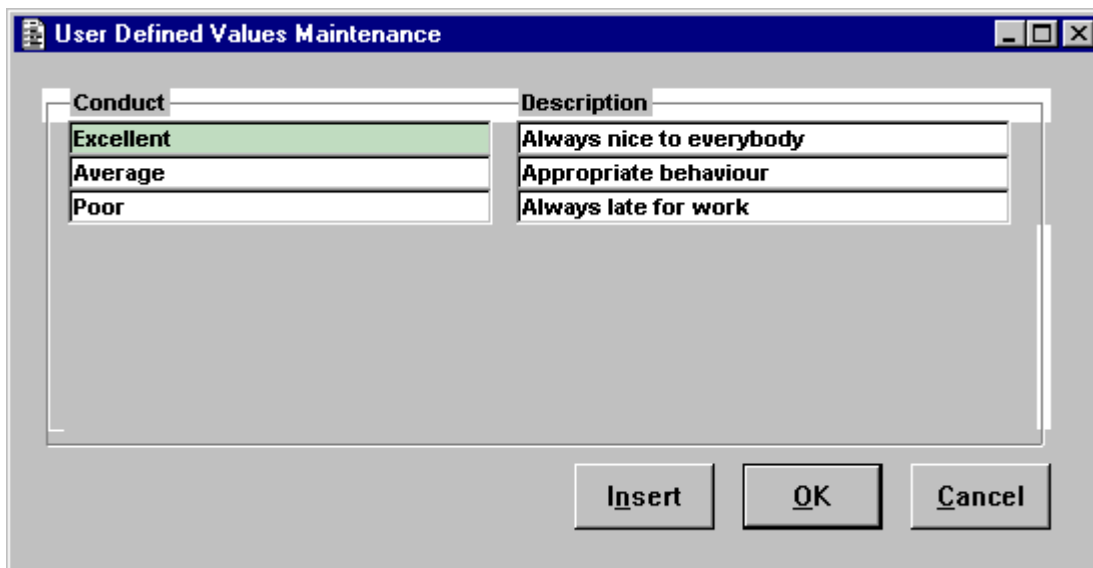
Move Up/Down Buttons

These buttons are used to sequence the user defined fields in the order in which you wish to present them to the user.

By selecting a record and clicking the "Up" button, the record will be moved up the list of available fields. By selecting a record and clicking the "Down" button, the record will be moved down the list of available fields.

User Defined Values Maintenance

This form allows the establishment of valid input data for a user defined field, where the user defined field has been marked as "Validate". See the User Defined fields Layout Maintenance form for information on the Validate field.



The image shows a software window titled "User Defined Values Maintenance". It contains a table with two columns: "Conduct" and "Description". The "Conduct" column has three rows: "Excellent" (highlighted in green), "Average", and "Poor". The "Description" column has three rows: "Always nice to everybody", "Appropriate behaviour", and "Always late for work". At the bottom of the window are three buttons: "Insert", "OK", and "Cancel".

Conduct	Description
Excellent	Always nice to everybody
Average	Appropriate behaviour
Poor	Always late for work

User Defined Values Maintenance Form

Field Name (e.g. Conduct)

This column contains the user values required for the user defined field. The field name is reflected at the top of the column. In this example the field name is Conduct.

Any values entered in this form will be available for a user to select when editing the appropriate user defined field.

Description

Enter the description that is appropriate for the value entered in the field name value column.

This field is mandatory.

Using User Defined Fields

Your site may have established other fields which are not a normal part of the system. To access these fields your cursor must be located in the right position on the form.

Typically, your system supervisor will have specific instructions on how to gain access to user defined fields on forms where they have been established.

By way of example we are going to use the Name and Address system.

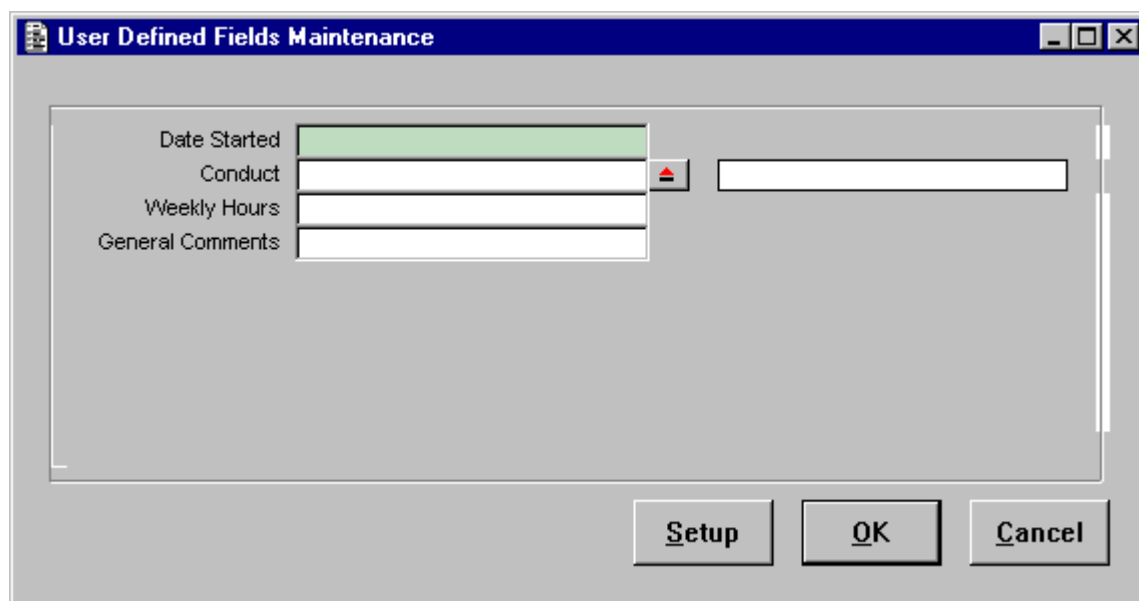
To gain access to the User Defined fields on the Personal Name Maintenance form your cursor should be located in one of the name fields.

Select Associated, Fields from the menu bar at the top of the screen.

This will display the User Defined Fields Maintenance Form.

User Defined Fields Maintenance Form

This form will allow entry of data into User Defined fields that are Text based. For User Defined fields that are of an Image type select Associated, Images/Objects from the menu bar at the top of the screen.



User Defined Fields Maintenance Form

Field Name

The field name associated with each field is user definable. As such the contents being entered into each field are also at the discretion of your organisation. Your system supervisor will provide you with valid documentation about the contents of each field.

Where a Pop Up Button is displayed against a field then entry is limited to only that contained within the Pop Up list. To gain access to the list you may either double click in the field or activate the Pop Up Button.

Where data is selected from a Pop Up list then the description is automatically populated in the field to the right.

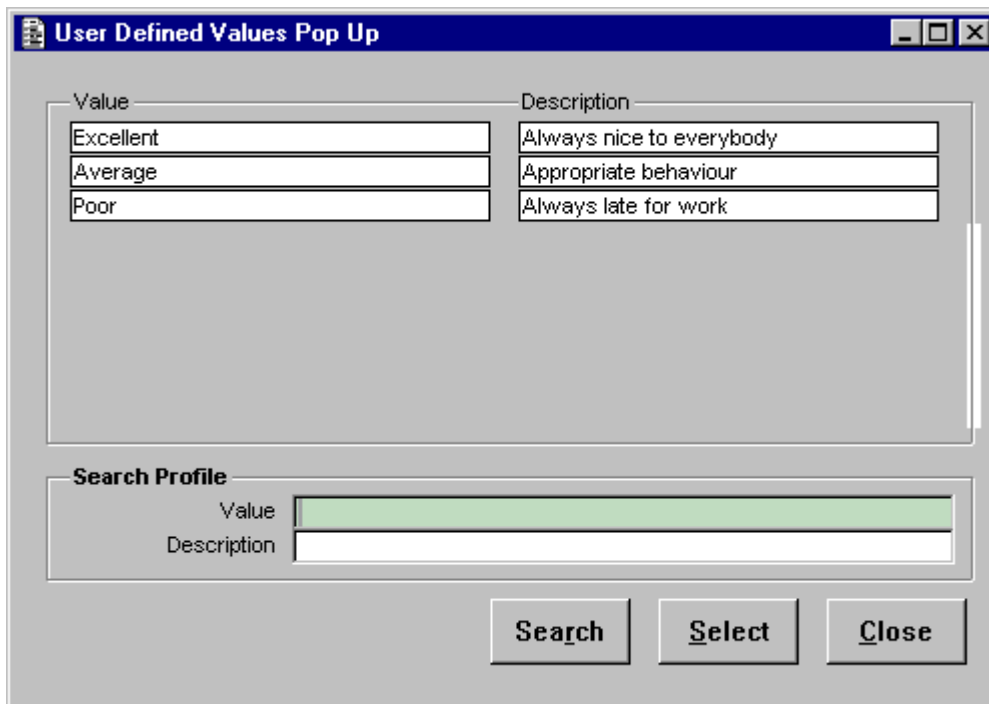
Description

This field is only displayed if a list of valid input has been defined. The description of the data for the field will be automatically displayed.

User Defined Values Pop Up

This form displays a list of all valid input for the user defined field you are editing.

Select the required text from the list using the Select Button or by double clicking on the occurrence.



The image shows a software window titled "User Defined Values Pop Up". It contains a table with two columns: "Value" and "Description". The table lists three entries: "Excellent" (Always nice to everybody), "Average" (Appropriate behaviour), and "Poor" (Always late for work). Below the table is a "Search Profile" section with two input fields: "Value" (highlighted in green) and "Description". At the bottom right are three buttons: "Search", "Select", and "Close".

Value	Description
Excellent	Always nice to everybody
Average	Appropriate behaviour
Poor	Always late for work

Search Profile

Value:

Description:

Search **Select** **Close**

User Defined Values Pop Up Form

Value

This field contains the text that will be inserted into the user defined field.

Description

This field contains the meaning of the inserted text. This text will be displayed on the User Defined Fields Maintenance Form alongside the text.

User Defined Images Maintenance Form

This form is used to assign images to a user defined field.

The scroll bar on the right hand side of the form is used to move from one image to another. For example, if three User Defined fields are present, use the arrows on the scroll bar to move between the fields.



User Defined Images Maintenance Form

Refresh Button

This button is used to update the image in the form.

If the image has been modified using an appropriate image product then pressing Refresh will update the image to the latest version.

Edit Button

Activating this button will initiate the appropriate image product selected by your site to allow modification of the image file.

After editing the image the Refresh Button should be used to update the image on this form.

If the image has been stored in the data base (as opposed to “linking” to the image) this option is not available. If this option is selected the message “Editing is not allowed on objects loaded into the database” will be displayed.

Load Button

Activate this button to load an image into the User Defined Field.

If an image already exists in this field you do not have to delete it. When the new image file is selected it will replace the existing image.

When activating Load you will be presented with the “File Open” dialogue box. Select the appropriate drive and file name of the image you wish to load and press OK.

Special Characters

The following topic is covered in this section:

[Using Special Characters](#)

Using Special Characters

Pathway provides the ability to use special characters in text fields.

To insert a special character the command <Gold> J must be inserted prior to the character composition.

The <Gold> key is the Plus Key on the numeric keyboard.

For example to insert a superscript 2 which represents “squared” the following keystrokes will be required.

<Gold> J ^2.

The ^ symbol is uppercase 6.

The following table represents the most commonly used special characters and the keystrokes required.

Meaning	Font View	Composition
Cent sign	¢	<Gold> J c/
Pound sign	£	<Gold> J l-
Yen sign	¥	<Gold> J y-
Section symbol	§	<Gold> J s!
Copyright symbol	©	<Gold> J co
Registered trademark	®	<Gold> J ro
Degree symbol	°	<Gold> J +o
Plus or minus symbol	±	<Gold> J +-
Division sign	÷	<Gold> J %/
Superscript one	¹	<Gold> J ^1
Superscript two	²	<Gold> J ^2
Superscript three	³	<Gold> J ^3
A grave capital	À	<Gold> J A`
a grave small	à	<Gold> J a`
A acute capital	Á	<Gold> J A'
a acute small	á	<Gold> J a'
A umlaut capital	Ä	<Gold> J A''
a umlaut small	ä	<Gold> J a''
AE diphthong capital	Æ	<Gold> J AE
ae diphthong small	æ	<Gold> J ae
E grave capital	È	<Gold> J E`
e grave small	è	<Gold> J e`
E acute capital	É	<Gold> J E'
e acute small	é	<Gold> J e'
E umlaut capital	Ë	<Gold> J E''
e umlaut small	ë	<Gold> J e''
I grave capital	Ì	<Gold> J I`
i grave small	ì	<Gold> J i`
I acute capital	Í	<Gold> J I'
i acute small	í	<Gold> J i'
I umlaut capital	Ï	<Gold> J I''
i umlaut small	ï	<Gold> J i''
O grave capital	Ò	<Gold> J O`
o grave small	ò	<Gold> J o`
O acute capital	Ó	<Gold> J O'
o acute small	ó	<Gold> J o'

User Defined Help

The following topic is covered in this section:

[Using User Defined Help](#)

Using User Defined Help

User Defined Help allows you to define help text for a particular form. The User Defined Help function can also incorporate the Memo function allowing Word documents etc to be incorporated into the User Defined Help. This could be particularly helpful if you define Procedures and wish to have these available as online User Help.

The User Defined Help is associated to a form and not to individual fields within a form. A message will be displayed in the Message frame informing the user that User Defined Help exists for the form. To display the User Defined Help select the Help option and then User Defined or use ALT SHIFT F1 to display the text.

Form names can be found by using Help and selecting About Form or by using CONTROL SHIFT F1 while displaying the form you wish to define User Help for.

User Defined Help Search Profile

The User Defined Help Search Profile form allows you to create new Help Text for a form or select existing Help Text which has been defined for a form.

Select the New Button to create Help Text for a new form. To select existing Help Text either leave the fields blank and select the Search button to show all forms which have User Defined Help or enter in the Help Form and or Description to limit the search to a required selection.



User Defined Help Search Profile Form

Help Form

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

This field can be left blank.

Description

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

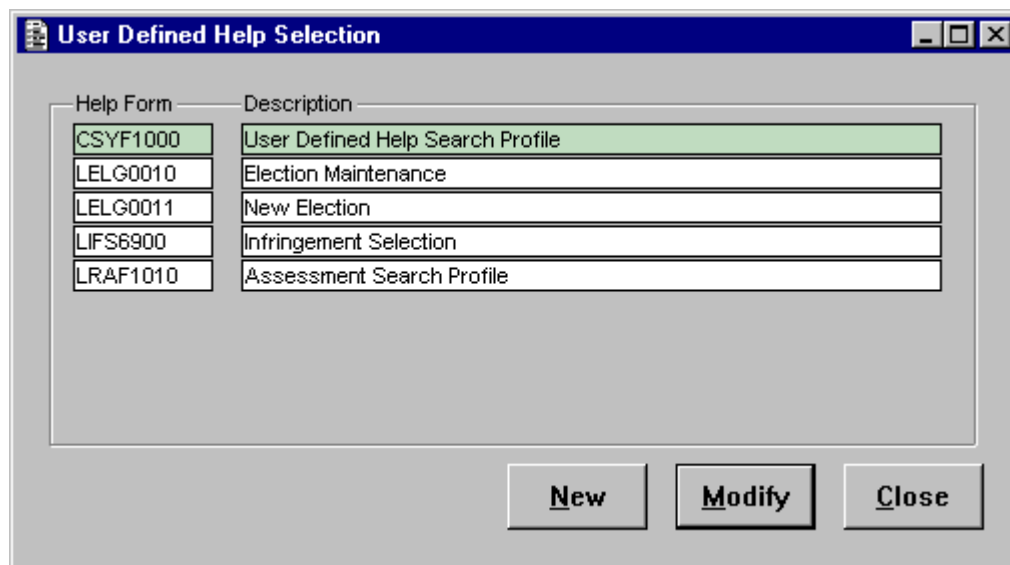
This field can be left blank.

User Defined Help Selection

The User Defined Help Selection form is displayed when the Search button has been selected on the User Defined Help Search Profile form.

This form displays the forms which have User Defined Help associated to them. Select the form you wish to

modify or select the New button to create Help for a new form.



The 'User Defined Help Selection' window displays a table with two columns: 'Help Form' and 'Description'. The table lists five entries, with the first one highlighted in green. Below the table are three buttons: 'New', 'Modify', and 'Close'.

Help Form	Description
CSYF1000	User Defined Help Search Profile
LELG0010	Election Maintenance
LELG0011	New Election
LIFS6900	Infringement Selection
LRAF1010	Assessment Search Profile

User Defined Help Selection Form

Help Form

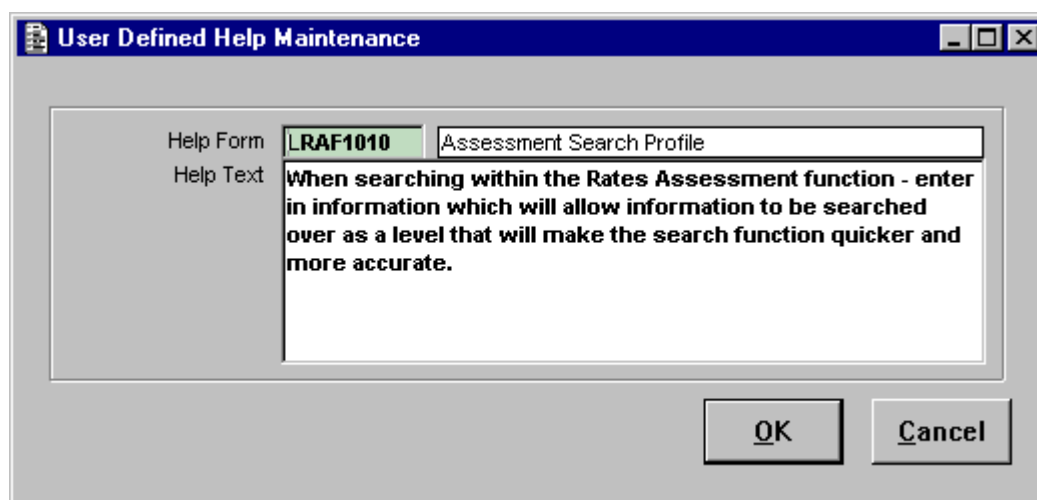
Forms which have had User Defined Help associated to them are listed on this form for selection.

Description

The Description of the Form which has had User Defined Help associate to it is displayed in this field.

User Defined Help Maintenance / Enquiry

The User Defined Help Maintenance / Enquiry form shows the Form Name, Description and User Defined Help Text. The Memo function is available for use within your Help Text while in maintenance display.



The 'User Defined Help Maintenance' window shows a form for editing help text. It has two input fields at the top: 'Help Form' (containing 'LRAF1010') and 'Description' (containing 'Assessment Search Profile'). Below these is a large text area for 'Help Text' containing the text: 'When searching within the Rates Assessment function - enter in information which will allow information to be searched over as a level that will make the search function quicker and more accurate.' At the bottom right are 'OK' and 'Cancel' buttons.

User Defined Help Maintenance Form

Help Form

The Help Form is shown or entered in this field. This is the Form name found by using Help and selecting About Form or by using CONTROL SHIFT F1 while displaying the form you wish to define User Help for. The description of the Form is shown in the field next to the Help Form.

During Enquiry these fields are non maintainable.

Help Text

In Maintenance display enter in the User Help Text that is to be displayed for the form nominated. Text will wrap around automatically while typing. By double clicking in this field the zoom function activates. This will show the User Defined Text already entered (if any) and allow entry of information. Auto wrap will automatically occur while typing.

Selecting F6 will accept information recorded in the zoom display.

Printing

The following topic is covered in this section:

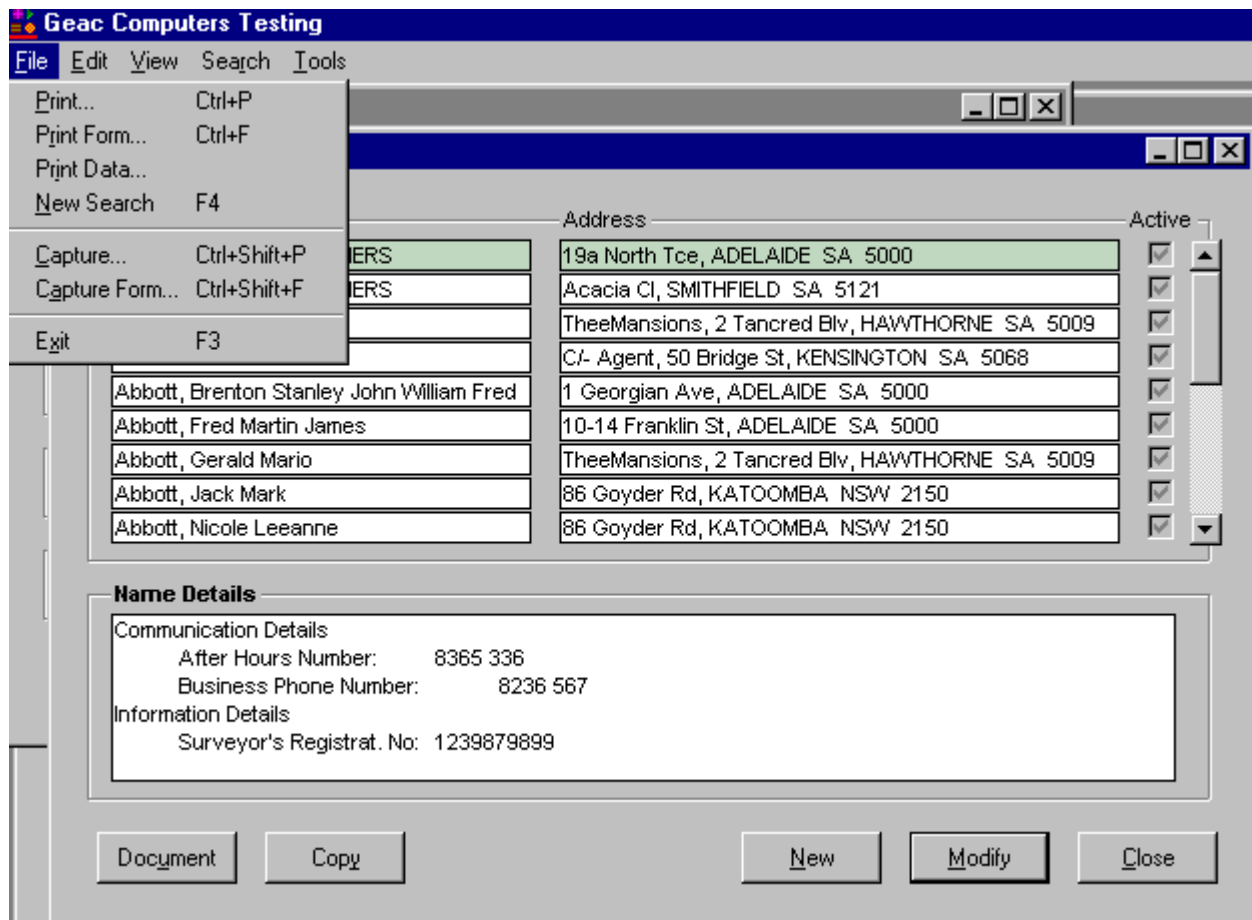
[Report Printing](#)
[Screen Dumps](#)

Report Printing

Printed output can be sent to a specific Word Processor or to the screen or sent via email. When reports are sent to Notepad to be printed, it is advisable to set the default Font to MS Linedraw to ensure that lines are printed correctly. If you encounter the problem of characters printing instead of lines whilst using Notepad, then you should check that the following font file is located in your Windows directory, e.g. WINNT/Fonts/ MS Linedraw LINEDRAW.TTF.

Screen Dumps

Printing of screen contents is available via the File Menu.



File Menu Options

Print

This option prints the entire screen contents and includes details as shown below.

Geac Computers Testing

File Edit View Search Tools Help

Name Search Profile

Name Selection

Name	Address	Active
Abbott	TheeMansions, 2 Tancred Blv, HAWTHORNE SA 5009	<input checked="" type="checkbox"/>
Abbott	C/- Agent, 50 Bridge St, KENSINGTON SA 5068	<input checked="" type="checkbox"/>
Abbott, Brenton Stanley John William Fred	1 Georgian Ave, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Fred Martin James	10-14 Franklin St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Gerald Mario	TheeMansions, 2 Tancred Blv, HAWTHORNE SA 5009	<input checked="" type="checkbox"/>
Abbott, Jack Mark	86 Goyder Rd, KATOOMBA NSW 2150	<input checked="" type="checkbox"/>
Abbott, Nicole Leeanne	86 Goyder Rd, KATOOMBA NSW 2150	<input checked="" type="checkbox"/>
Abbott, Peter	C/- Agent, 50 Bridge St, KENSINGTON SA 5068	<input checked="" type="checkbox"/>
Abbott, Sam	Eddi's Escort Agency, C/- Po BOX 67, Kensington	<input checked="" type="checkbox"/>

Name Details

Communication Details
 Information Details
 Application Information Details

Current - Parent: Honorable Fred Martin James Abbott
 Current - Agent: Lady Nicole Leeanne Abbott

Document Copy New Modify Close

Form: CNASIDTY
 Entity: CNAVIDTY
 Field: SIDTY_NAME
 Date/Time: 01-Aug-2000 11:21:43
 Release: 02.08.005 (0016) No Fixes
 Customer: INTERNAL
 User: SMITHG
 Stage: Test
 Platform: NT4

Print Form

This option prints the form displayed on the screen including details as shown below.

Name	Address	Active
Abbott	TheeMansions, 2 Tancred Blv, HAWTHORNE SA 5009	<input checked="" type="checkbox"/>
Abbott	C/- Agent, 50 Bridge St, KENSINGTON SA 5068	<input checked="" type="checkbox"/>
Abbott, Brenton Stanley John William Fred	1 Georgian Ave, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Fred Martin James	10-14 Franklin St, ADELAIDE SA 5000	<input checked="" type="checkbox"/>
Abbott, Gerald Mario	TheeMansions, 2 Tancred Blv, HAWTHORNE SA 5009	<input checked="" type="checkbox"/>
Abbott, Jack Mark	86 Goyder Rd, KATOOMBA NSW 2150	<input checked="" type="checkbox"/>
Abbott, Nicole Leeanne	86 Goyder Rd, KATOOMBA NSW 2150	<input checked="" type="checkbox"/>
Abbott, Peter	C/- Agent, 50 Bridge St, KENSINGTON SA 5068	<input checked="" type="checkbox"/>
Abbott, Sam	Eddi's Escort Agency, C/- Po BOX 67, Kensington	<input checked="" type="checkbox"/>

Name Details

Communication Details
 Information Details
 Application Information Details

Current - Parent: Honorable Fred Martin James Abbott
 Current - Agent: Lady Nicole Leeanne Abbott

Buttons: Document, Copy, New, Modify, Close

Form: CNASIDTY
 Entity: CNAVIDTY
 Field: SIDTY_NAME
 Date/Time: 01-Aug-2000 11:21:43
 Release: 02.08.005 (0016) No Fixes
 Customer: INTERNAL
 User: SMITHG
 Stage: Test
 Platform: NT4

Print Data

This option allows the user to specify what is to be printed and the print destination. As this option prints the data, it is recommended that it be used on forms containing lists of data.

The following form displays when this option is selected.

Print: CNASIDTY

Print Mode

☒ All
☐ Screen
☐ Component
☐ Clear

Print Job Model

PRINTER >>

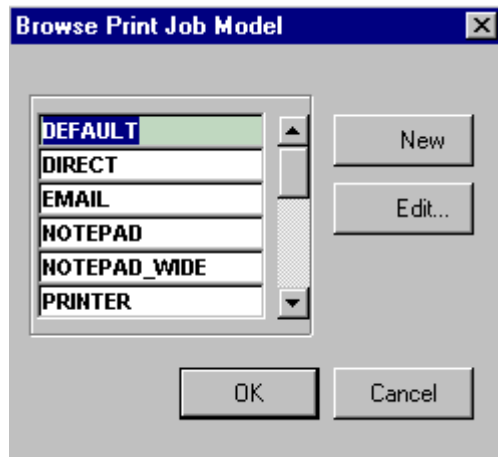
Buttons: OK, Cancel

Print Mode

Use this radio group to select the print mode. Choose:

- All, to print all data contained in the external structure. Default.
- Screen, to print everything on the screen.
- Component, to print data and fixed text on the entire form.
- Clear, to clear all data from memory immediately after it is printed.

Print Job Model



The above Pop Up allows the user to do the following:

- Enter the name of the print job model you want to use for this print. The default model is Printer.
- Enter the name of a print job model (or a retrieve profile) and click the adjacent button to select or update a print job model from the Browse Print Job Model form.
- Click the adjacent button to create a new print job model.

Capture

This option captures the entire screen contents and places it on the clipboard.

Capture Form

This option captures the form displayed on the screen and places it on the clipboard.

GIS Interface

Summary

- GIS Interfacing is now an authorised function. There are two levels of authorisation. One for the base interface as it was prior to Release 2.11 and one for the enhanced interface including all the new functionality in Release 2.11. This means GIS Interfacing will only function if you are authorised to use it.
- The user interface for GIS functionality within Pathway has changed. The GIS button on the Property Search form remains, the GIS button on the Property selection form remains but the menu option(s) for Display on GIS are no longer in the Options menu or Options buttons on the Property Summary form or Property Selection form. This has been replaced with a picture of a world on the Summary form and a Display on GIS menu option has been added to the Associated menu of the Summary form.
- GIS User security has been added (new menu option in the Property module) to control security for GIS functions by user. By default, no users will have access to GIS so this must be set up after the upgrade to Release 2.11 before anyone will be able to use the GIS interfacing capabilities of Pathway.
- Wherever the picture of the world appears on a Pathway form, it can be double clicked to perform the Display on GIS action. Within the Property module, the picture will function on the Property Summary, Title Maintenance and Parcel Maintenance form at that level if your map has a corresponding layer, if it doesn't Pathway will translate to the nearest available layer in your map to perform the display.
- The GIS References are maintained in the same way as they were before in the Property module via the option called GIS References on the Property, Title, Parcel and Street. These forms have been modified slightly to make them easier to use.
- GIS functionality has been added to the following Pathway modules in addition to the Property module: Customer Service, Animals, Applications, Licensing, Infringements and Rates/Water Billing.
- The GIS functionality in these additional Pathway modules is only available where the item is linked to a Property, Title, Parcel and/or Street.
- The user interface for GIS functionality within each of these modules is consistent with the Property module with a GIS button appearing on the Search form, selection form and the picture of the world on other relevant forms including the summary form.
- A System Action called Display on GIS is available to be linked to a User Action and assigned to a Task. As at this Release level, this is functioning for Workflow within Applications and Customer Service only. Where a Task is set up with this System Action, 'starting' the Task will take the user to the relevant display on the Map.
- The Display Query on GIS menu option that was in the Property Module menu has been moved to the Query menu. This function has been enhanced to allow Pathway queries to be displayed for all the main entities of all the additional GIS modules as well as the existing Property entities.
- From the GIS Product side of the interface, two additional functions are available to allow the GIS Product to request Pathway to Display items from the additional modules and to create Pathway queries for the main entity of the additional GIS modules.
- Note for those using a GIS Product that uses database communication to communicate with Pathway (Internet Map Server, GenaMap Webbroker, Infomaster and any others using the Database product code in Pathway). You will notice that the Check GIS function within Pathway has been moved from the menu option on the Property Search form and has become a button on all Search forms of all GIS modules. For this database communication method, the Create Link function for creating and updating GIS References in Pathway is now available in addition to the two new functions. An executable is available with Pathway to automatically trigger the Check GIS command (currently used for Infomaster) to remove the need for the user to perform two steps when requesting Pathway to perform an action.
- For those using the standard interface supplied by Infor to the following GIS products, there is no need to make any changes to the GIS side of the interface to use the new functions: MapInfo, ArcView or MapObjects 1.2 (Pathway MapViewer). For all others, the GIS Product vendor supplies the GIS side of the interface. A technical document is available on request detailing what needs to be done to the GIS side of the interface by the GIS Product vendors to enable the new functionality.

- A separate section, detailed below contains a more detailed overview of the functionality.

The following topics are covered in this section:

[Overview](#)

[Pathway GIS User Security](#)

[GIS to Pathway](#)

[Pathway to GIS](#)

[Application Specific Overview](#)

Overview

This section covers the setup required within Pathway and the GIS Product as well as the functionality that can be achieved with the interface. It does not cover the technical requirements for implementing an interface between Pathway and a GIS Product and does not go into detail about interfacing to every GIS Product. It is also not intended to be a definitive user guide, it is an overview of the capabilities of Pathway with an interfaced GIS Product.

Setup Required

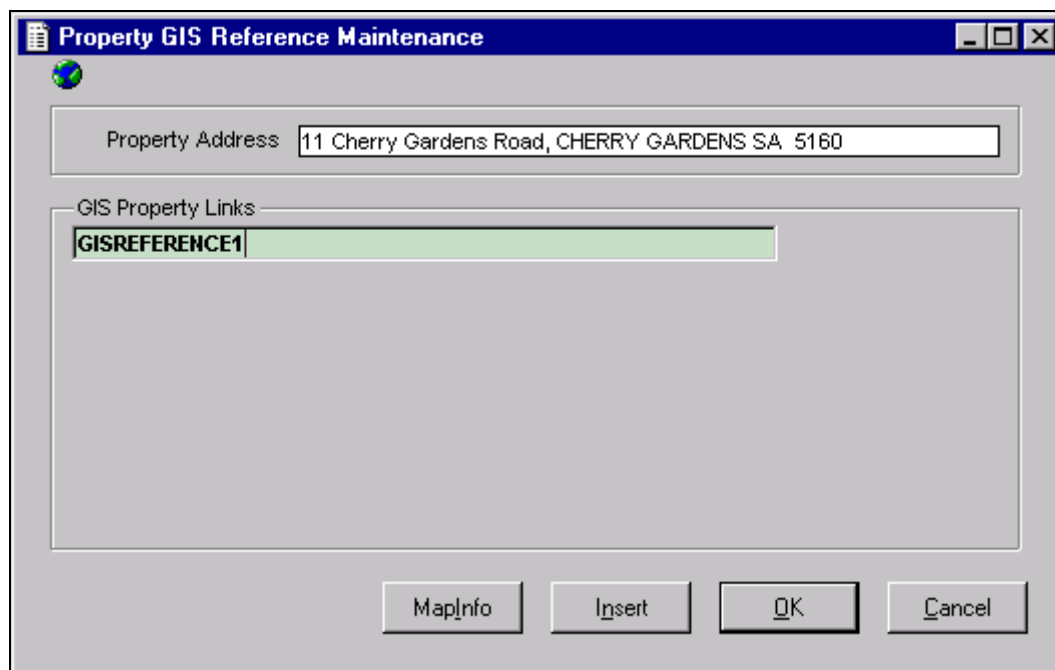
The first thing to decide when setting up an interface between Pathway and a GIS Product is which level or levels to link. Pathway allows for a map layer within the GIS Product to be linked at one of the following levels:

- *Property*
- *Title*
- *Parcel*
- *Street*

If the GIS Product is capable of handling multiple layers, links between Pathway and the GIS Product can be created and maintained for all the possible levels or some of them.

The links between Pathway and the map layer within the GIS Product are maintained within Pathway as GIS References. There are four separate database tables within the Pathway database, one for each level, that hold the GIS References. These GIS References must correspond to a unique identifier held in the GIS Product against a polygon in the appropriate map layer.

Pathway allocates internal numbers to Properties, Titles, Parcels and Streets. It is possible to use these internal numbers as GIS References. Some GIS Products however, require GIS References to be in a very specific format. Individual GIS References can be anything that will fit into the 50-character field provided in Pathway to store GIS References. Pathway allows multiple GIS References to be stored against a single item at one of the four available levels if required. The GIS Product must hold matching GIS Reference values against the individual polygons in the map to enable the link between the map and Pathway.



Within the Property Administration application, a GIS Reference menu option is available from Property Maintenance, Title Maintenance, Parcel Maintenance and Street Maintenance. This option will bring up a form that looks like the following example for the Property level, which allows maintenance of GIS References:

The interface to some GIS Products allows for the automatic population of these GIS References from the map. This functionality is discussed later in this document. The maintenance of GIS References in Pathway and the GIS Product is an ongoing process as changes are made. For example, subdivisions will require modifications to the map as well as Pathway to accurately represent the new situation.

There are also parameter settings that must be set for the individual GIS Product within Pathway. These settings are all the details that Pathway requires to be able to communicate with the GIS Product as well as details on which layers are available in the map. The following parameter setting example is for a MapInfo map that has Title, Parcel and Street layers available:

GIS Code	MAPINF	
GIS Name	Map%Info	
Description	MapInfo Version 5.0	
Active	<input checked="" type="checkbox"/>	
Path for Executable	P:\MAPINFO5\mapinfo.exe	
Path for GIS Database	G:\GIS\MapInfo\Pathway.wor	
Path for Interface	.gis	
DDE System	MAPINFO	
DDE Topic	PATHWAY.MBX	
Parameters	Button_Top=0.44,Button_Left=6.49,Message_Top=4.61458,Message_Left=5.55208,Message_Width=2.69792,Message_Height=0.90625,Report=F	

	GIS Layer	GIS Reference Field
Property		
Title	TITLEC	LIC_Tag
Parcel	PARCELC	LIC_Tag
Property Street	ROADS	LIC_Tag

More OK Cancel

When layers within the GIS are not specified, Pathway translates to the nearest available layer for Property, Title and Parcel layers. No translation is possible between the Street layer and the other three layers. This means that for the example parameter setup shown above, the Display on GIS action from the Property Summary form will use the Title layer to perform the Display on the map.

Functional Overview

Once the links are established between Pathway and the GIS Product, the two-way interface can function correctly. There are two sets of commands that are available to the user for a Pathway GIS interface. One is for accessing the map from Pathway and the other is accessing Pathway from the map. Both sets of commands are described in following sections.

Access to GIS processing is controlled by GIS User security within Pathway, which is set for each user by application. A given user can be given the default Enquiry access to each application or may be given Maintenance access to a given application. The user may also be denied access to a given application as required.

Pathway GIS User Security

An individual user can be given access to GIS processing for all applications in Pathway, some of the applications, or none of the applications depending on requirements. Each user can be given Maintenance or Enquiry access to a given application or denied access to a given application.

GIS User Security is specified on the GIS User Maintenance form. When the GIS Access flag is switched on for a given user, a detail button appears which will open the GIS User Application Maintenance form when it is clicked which allows access to be changed for the user for each application. If you do not click on the detail button the user receives Enquiry access to all Applications by default when GIS Access is on.

GIS Product parameter, allows individual Users to use a different GIS product. For example, the advanced users may need to access MapInfo, whereas other staff may be using EasiMaps. 'Default' is the Product that has been defined in the Property Parameters.

The screenshot shows the 'GIS User Maintenance' window. At the top, there are four fields: 'User Identifier' with a green box containing 'CHBAT', a text box with 'Chris Bath', a checked 'Active' checkbox, a checked 'GIS Access' checkbox, and a 'GIS Product' dropdown menu set to '(default)'. Below these is a 'Search Profile' section with a 'User Identifier' box containing 'CHBAT', a right-pointing arrow, and a text box containing 'Chris Bath'. At the bottom right are three buttons: 'Search', 'OK', and 'Cancel'.

The screenshot shows the 'GIS User Maintenance' window for a different user. The 'User Identifier' field has a green box with 'DTODD' and a text box with 'Deirdre Todd'. The 'Active' and 'GIS Access' checkboxes are checked. The 'GIS Product' dropdown menu is set to 'EasiMaps Version 6.0'. The 'Search Profile' section shows 'DTODD' in the 'User Identifier' box, an arrow, and 'Deirdre Todd' in the text box. The 'Search', 'OK', and 'Cancel' buttons are at the bottom right.

GIS User Application		Access Level
ACR	Customer Service	Enquiry
LAN	Animal Control	Maintenance
LAP	Application	(none)
LIF	Infringement	Enquiry
LLC	Licensing	(none)
LPA	Property Administration	Maintenance
LRA	Rates Accounting	(none)

The Access Level is used to determine which mode the appropriate form for the given application gets started in if it is not already open. If a user has access to both Maintenance and Enquiry functions for a given application, the mode they are currently in within Pathway is not changed by what is set in the GIS User Security. The Enquiry or Maintenance mode set in the GIS User Security only determines what happens if the form must be started by Pathway because it is not already open. If the Access Level is set to None, GIS processing is not available to the user for the application.

GIS to Pathway

The functions a user can perform within a given GIS Product may vary depending on the implementation of the interface within the individual GIS product. All the possible functions that Pathway can perform when requested by a GIS Product, with an explanation of what each one does, are in the sections that follow. It is important that all selections that are passed to Pathway from the map for any of the following functions are all from the same layer.

Display in Pathway



Note: Top icon is in use in ArcView and MapObjects GIS products and the lower icon is in use in MapInfo, EasiMaps GIS products.

This function will display the Property or Street that matches the selection made on the map.

When a Property, Title or Parcel selection is made on the map, if Property Maintenance or Enquiry is open within Pathway, it will be used in the context it is open. If the Property Search form is open within any other module for selection of Properties, it will be used to select Properties into that module. If the Property Search form is not open, Pathway will start Property Maintenance or Enquiry depending on the GIS User security and display the linked Property. If multiple Properties match, a Property Selection form will display the matching Properties for selection or maintenance/enquiry.

When a Street selection is made on the map, if Street Maintenance is open within Pathway, it will be used, if it is not open it will be started and the Street displayed. If multiple Streets match, the Street selection form will display the matching Streets.

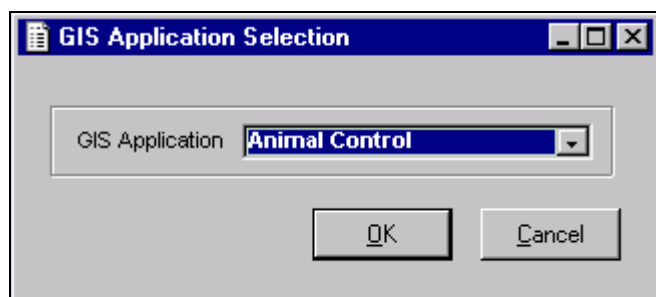
Display Other Module in Pathway



Note: Top icon is in use in ArcView and MapObjects GIS products and the lower icon is in use in MapInfo, EasiMaps products.

This function will display item(s) in any Pathway module that is capable of GIS that matches the selection made on the map.

When this function is performed, Pathway will display a list of modules to choose from in the following form (Animals for example):



Once the module is selected and the OK button is clicked, Pathway will present a Filtering form allowing further refinement of the selection by criteria available within each module. Each module's available filtering criteria is different. After selecting the required filtering criteria, Pathway will display the item in the module's Maintenance or Enquiry function. If the function is already open, it will be used in the context it is currently in, otherwise the relevant form will be opened using the mode specified in the GIS User Security. If only a single item matches, it will be displayed and if multiple items match, a selection form will display the matching items.

The Property Module is available from this list of applications if you make a selection from the Property, Title or Parcel layer to enable further refinement of the selection. This further refinement for Property is only available through this function and not through the Display in Pathway function.

All selections made on the GIS Application Selection form and the Filtering forms for each module are stored against the current Pathway user and are retrieved automatically next time the forms are invoked. This means the user's last selection defaults into these forms when that same user invokes the forms again.

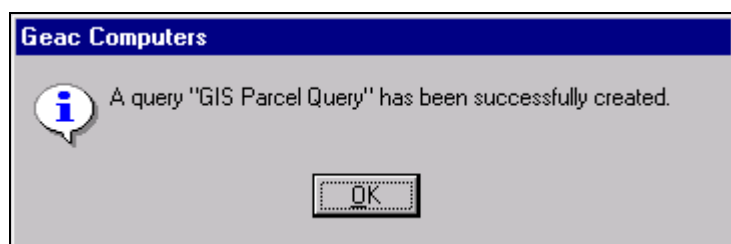
Create Pathway Query



Note: Top icon is in use in ArcView and MapObjects GIS products and the lower icon is in use in MapInfo, EasiMaps GIS products.

This function will create a Pathway Query for the layer that the selection is made on the map (Property, Title or Parcel). Once the Pathway Query is created it can be used within Pathway for Property Bulk Maintenance and other functions that can process records using a Pathway query as input. Note that with this function, no translation is possible from the selected layer to another layer.

The GIS Product will prompt the user for a description for the Query so that it can be identified at a later stage. When the creation of the Query has completed, Pathway will display a message to indicate that the Query has been created successfully, for example:



Create Other Module Pathway Query

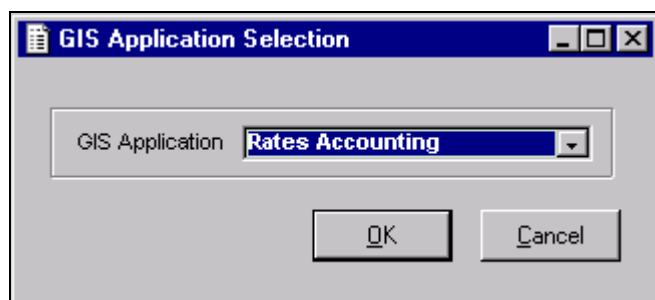


Note: Top icon is in use in ArcView and MapObjects GIS products and the lower icon is in use in MapInfo, EasiMaps products.

This function will create a Pathway query for any Pathway module that is capable of GIS that matches the selection made on the map.

Once the Pathway Query is created it can be used within Pathway for Bulk Maintenance within Property or Rates for example and other functions that can process records using a Pathway query as input such as relevant report options within all modules capable of GIS. With this function, it is possible to translate between the Property, Title and Parcel layers to create a resulting query at the required layer.

The GIS Product will prompt the user for a description for the Query so that it can be identified at a later stage. Pathway will then display a list of modules to choose from in the following form:



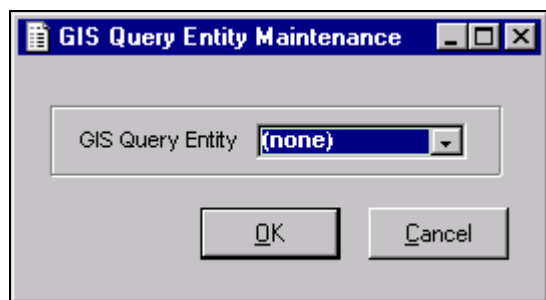
Once the module is selected and the OK button is clicked, Pathway will present a Filtering form allowing further refinement of the selection by criteria available within each module. Each module's available filtering criteria is different. After selecting the required filtering criteria, Pathway will create a query for the relevant entity within the module (for example LANANML for Animals).

All selections made on the GIS Application Selection form and the Filtering forms for each module are stored against the current Pathway user and are retrieved automatically next time the forms are invoked. This means the user's last selection defaults into these forms when that same user invokes the forms again. Note that these forms are the same ones used for the Display Other Module in Pathway function so each will retrieve the other's defaults for the current user.

When the creation of the Query has completed, Pathway will display a message to indicate that the Query has been created successfully, for example:



The Property Module is available from the list of applications if you make a selection from the Property, Title or Parcel layer to enable further refinement of the selection. This further refinement for Property is only available through this function and not through the Create Pathway Query function. When Property is selected, a further form is presented to enable you to specify if you want to translate to another entity:



The available entities are Property, Title and Parcel and translation is available from any of the Property, Title or Parcel layers on the map. No translation is possible if a Street selection is made on the map.

Return to Pathway



Note: Top icon is in use in ArcView and MapObjects GIS products and the lower icon is in use in MapInfo, EasiMaps GIS products.

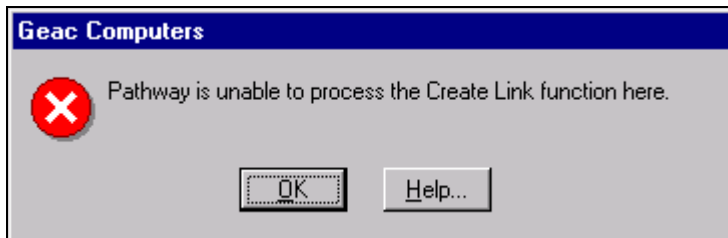
This function will simply activate Pathway, making it the front window. There is no requirement to make a selection on the map to be able to perform this function.

Create Link in Pathway



This function will create or update GIS References on the appropriate GIS Reference Maintenance form in Pathway to match the selection made on the map.

If the correct GIS Reference Maintenance form is not open in Pathway when the Create Link function is requested from the map, Pathway will present the following message:



and provides help to let the user know what to do.

The selection on the map in a particular layer means that the GIS Reference Maintenance form for that layer is the only one that can process the Create Link request.

For example, the Property GIS Reference Maintenance form shown below will respond to a Create Link request for a selection made in the Property layer of the map.

If there are no GIS References already in the form, Pathway will place the GIS Reference(s) sent from the map into the form as the GIS Reference Link. If there are any GIS References already in the form, Pathway will give a warning message before replacing any existing GIS References with the one(s) sent from the map.

Pathway to GIS

All the possible functions that a GIS Product can perform when requested by Pathway, with an explanation of what each one does, are in the sections that follow. The general form of the GIS functions available within Pathway is on the Search Profile, Selection and Summary forms of each module capable of GIS processing. Some modules have additional areas that are capable of GIS processing. The Pathway modules that are capable of GIS processing are:

- Property
- Applications
- Licensing
- Rates/Water Billing
- Animals
- Infringements (Property/Street related only)
- Customer Service (those linked to Property or Street only)


Activate GIS Product

This function will simply activate the GIS Product, which results in the GIS Product becoming the front window without taking any other action. This means any existing selection in the map remains selected. If the GIS Product is not active when this function is activated, Pathway will ask the user if they want to start the GIS Product.


This function is available from a button on the main Search Profile forms of any of the modules that are capable of GIS processing. The button is labelled with the name of the GIS Product.

Note: for any GIS interface that communicates with Pathway via the database, this button does not activate the map, it will perform the Check GIS function.

Display on GIS Product

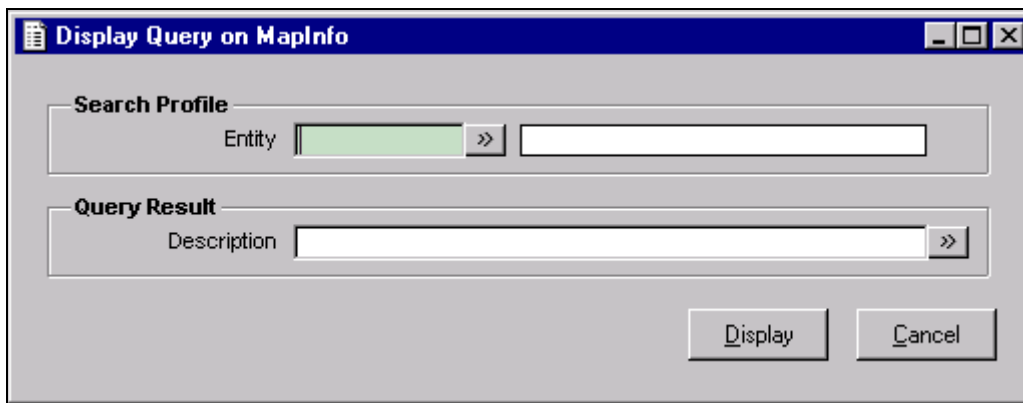
This function will display the selected item(s) on the map. It can be activated from within Pathway from a button on the module's selection form. It can also be activated from the module's Summary form by double clicking the picture of the world  at the top left of the form (or by using a menu option on the same form).

If the selection form is capable of multiple selection, multiple items can be selected for display. When the button is activated, the current selection is sent to the GIS Product to be displayed. If the GIS Product is not active when this function is activated, Pathway will ask the user if they want to start the GIS Product before performing the display.

The Summary form will have a picture of the world  which, when double clicked, will display the current item on the GIS Product. Once again if the GIS Product is not active, Pathway will ask the user if they want to start the GIS Product before performing the display. Any form that displays the picture of the world, can display the currently displayed item on the GIS Product. On any of these forms, a menu command is available from the Associated menu called Display on GIS, which will perform the same action as double clicking on the picture of the world. This menu option is provided so the command can be activated using the keyboard.

Display Pathway Query on GIS Product

This function will display the results of a Pathway query for all the main entities of the modules capable of GIS processing. The form looks like:



The user is required to select an entity from the available list (use the entity popup button to see the list). The user must then select a Pathway query result for that entity. Clicking on the Display button will display the result of the Pathway query on the GIS Product. If the GIS Product is not running, Pathway will ask the user if they want to start the GIS Product, before displaying the results of the Pathway Query.

The query result that the user selects for a specified entity may have been generated from within Pathway or from a selection on the map using one of the available Create Pathway Query functions.

Note: The menu option for this 'Display Query on GIS' is within the Query menu structure. Relevant staff should have access to this menu option.

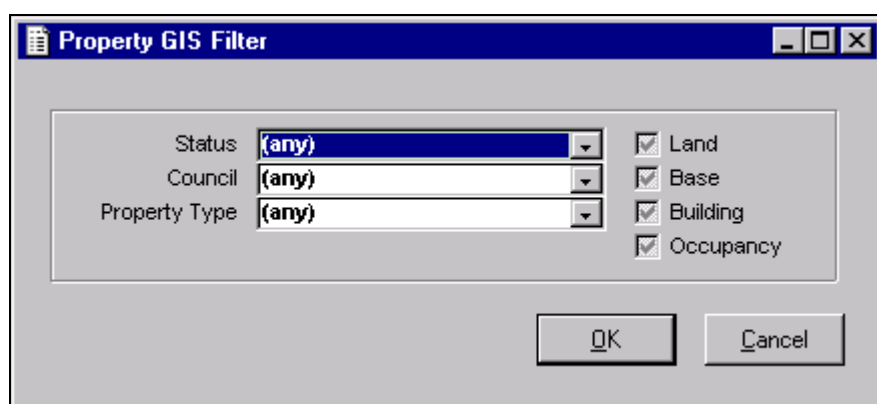
Application Specific Overview

The previous section described the GIS functionality within an interfaced GIS Product and within Pathway as an overall picture. This section is concerned with the functionality that is possible within each of the modules capable of GIS processing. Some modules have GIS processing in additional areas over what has been described in the previous section. This section shows the filtering available during GIS processing also gives some examples of how GIS processing can be used within each module.

Property Administration

Property GIS Filtering

The following form will appear when selecting the Property Administration module after performing a Display Other Module or Create Other Module Query command in the GIS Product:



Using this it is possible to further refine the items that have been selected on the map by Property Status, Council and Property Type. If the module is using Indicators, filtering may also be performed based on the Land, Base, Building and Occupancy indicators.

Examples

The following examples for the Property Module are only some of the things that can be achieved using the interface between Pathway and a GIS Product.

Display only Current Properties from a selection of Properties on the map



This involves making a selection in the GIS Product from the Property layer and activating the Display Other Module command. Pathway will respond by prompting for the module. Selecting the Property Administration Module and then clicking on OK will present the Property GIS Filter. Selecting the Property Status of "Current" and click on OK will result in only those Properties that are Current, matching the selection made on the map, being displayed.

This function can be useful when GIS References are re-used on new properties when an existing property is made historic during a sub-division.

Generation of Notices/Letters from a selection of Properties or Parcels on the map



This involves making a selection in the GIS Product from the Property or Parcel layer and performing the Create Other Module Query command. A description must be given to enable the Pathway Query to be identified later. Selecting the Property Administration module and specifying Filter criteria of at least 'Current' will then produce an additional selection of entity for which to create the Pathway Query. Selecting Property will create a Property Query that can then be used in the Miscellaneous Notices menu option to generate the required letters.

Alternative option for generating Notices/Letters from a selection on the map

This process can be used as opposed to creating a Query.

Using the Miscellaneous Notices menu option, select the INSERT button.

This will take the operator to the Property Search form.

Select the Map Button (with no property search criteria entered) and this will take the operator to the Map.

Highlight the required map selection and select the Other Module option.

Select Property and enter in relevant filter criteria and OK.

This will return the operator to the Property Select Form (as accessed within Miscellaneous Notices). The operator highlights the Property and takes SELECT. All of the highlighted properties are inserted into Miscellaneous Notices form.

The system is assuming that because the operator is in Miscellaneous Notices, this is where the result from the GIS selection is to be passed.

Bulk Update of Zone at Parcel level from a selection of Properties on the map

This involves making a selection in the GIS Product from the Property layer and performing the Create Other Module Query command. A description must be given to enable the Pathway Query to be identified later.

Selecting the Property Administration module and specifying some Filter criteria if required will then produce an additional selection of entity for which to create the Pathway Query. Selecting Parcel will create a Parcel Query that can then be used in the Bulk Parcel Zone Update function within Pathway.

Bulk Update of Title Conditions from a selection of Parcels on the map

This example uses the same concept as the previous example. It involves making a selection in the GIS Product from the Parcel layer and performing the Create Other Module Query command. A description must be given to enable the Pathway Query to be identified later. Selecting the Property Administration module and specifying some Filter criteria if required will then produce an additional selection of entity for which to create the Pathway Query. Selecting Title will create a Title Query that can then be used in the Bulk Title Conditions Update function within Pathway.

Produce the Property Report from a selection of Parcels on the map

To produce the Property report for a query within Pathway, the Query must be a Property Query. If the GIS Product only has the Parcel layer available, a Property Query can be created from a selection made in the Parcel layer of the map.

Make a selection in the GIS Product from the Parcel layer and perform the Create Other Module Query command. A description must be given to enable the Pathway Query to be identified later. Selecting the Property Administration module and specifying some Filter criteria if required will then produce an additional selection of entity for which to create the Pathway Query. Selecting Property will create a Property Query that can then be used in the Property Report to identify which Properties to report on.

Create a Pathway Query to identify Properties with a Land Use of "Recreation Reserve" and display the result on the map

Within Pathway, create a Pathway query to identify all properties with a Land Use of "Recreation Reserve". The Display Query on GIS menu option can then be used to display the Property Query on the map. This would require the Property entity to be selected and then the relevant Property Query to be selected for display. Then by simply clicking on the Display button, the query is displayed on the map.

The Pathway query can be created with any criteria that the Pathway Query engine is capable of processing.

If the Pathway query is created for Properties and the map only has Parcel layer available, the Display Query on GIS function will translate the Property query to the Parcel layer during the display.

Workflow System Action

A Workflow System Action called GIS Display is available within the Applications and Customer Service modules only. This Action will display the item that the task relates to on the map. If the GIS Product is not already running when this action is performed, the user is given the option of starting the GIS Product before the item is displayed.

Future Releases of Pathway will incorporate this System Action into other Pathway modules capable of both GIS processing and Workflow.

Examples

Create a User Action, using the System Action of GIS Display

Create a Task in Applications Workflow parameters that contains the above Action

Add the Task to the relevant Procedure

This Action could be required, to ensure that the staff member reviews the Map to determine whether other non-Pathway attributes held on the Map are relevant to the Application being processed.

Applications

Applications GIS Filtering

The following form will appear when selecting the Application module after performing a Display Other Module or Create Other Module Query command in the GIS Product:

The Class will default from any previous selection or from the last Class that the operator accessed within Pathway.

It will only allow selection of Classes that the operator is authorised to.

Examples

Display only 'approved' applications lodged within a certain timeframe or Year from a selection on the map




This involves making a selection in the GIS Product and activating the Display Other Module command. Pathway will respond by prompting for the module. Selecting the Application Module and then clicking on OK will present the Application GIS Filter. Entering the Class and Lodgement Date range or Year and Status code then clicking on OK will result in only those Applications matching the filter criteria and matching the selection made on the map, being displayed.

Any other combinations of filter criteria can be used.

Select 'affected properties' for a given Application from the map and add to the Pathway Application



This process would require the operator to access the Application and 'Affected Properties' option.

Highlight the Property (linked to the Application) and double click the World icon  This will take the operator to the Map (prompting to start the GIS session if not already active). The operator then selects the required surrounding area and selects the 'original' Pathway option, as above. This option will function, when the operator is in the Affected Properties Form, and take the operator to the selection option to choose, Owner,

Occupier etc. Upon selection of the required option, the chosen properties (from the map) are automatically loaded as 'affected properties'.

Creating a Pathway Applications Query to use over the Applications Register Report



This involves making a selection in the GIS Product and performing the Create Other Module Query command. A 'description' must be given to enable the Pathway Query to be identified later. Selecting the Application Module and then clicking on OK will present the Application GIS Filter. Entering the Class and other relevant filter criteria and then clicking on OK will create the Pathway Query. From the Applications Register Report, the newly created Query can then be selected.

Display on Map, the properties selected from any Applications Select, Summary or other Form



From an Applications Select Form, one or many Application records can be selected and the Map Button taken. The Properties or Parcels linked to the selected Application records will be displayed on the Map.

Form the Applications Summary Form, double clicking the World will display the linked Parcel or Property on the Map.

From the Locations option within Applications Maintenance or Enquiry, one of the Locations can be selected and a double click on the World icon will display this record on the Map.

From the Inspections Option, an Inspection can be selected and double click on the World icon will display the location/s linked to the Inspection on the Map.

From the Permits and Certificate Option, a Permit/Certificate record can be selected and double click on the World icon will display the location/s linked to the record on the Map.

From a Pathway generated Application Query, display results on the Map

Using standard Pathway Query function, an Application Query with results can be selected, via the "Display Query on GIS" menu option within the Query menu structure. This option will then display the matching GIS record to all records in the Query on the Map.

Licensing

Licensing GIS Filtering

The following form will appear when selecting the Licensing module after performing a Display Other Module or Create Other Module Query command in the GIS Product:

Licence GIS Filter

Licence Details

Class: >>

Number: -

Year: -

Expiry Date: -

LC Licence Type: >>

LC Status: >>

LC Area Codes: >>

OK Cancel

The Class will default from any previous selection or from the last Class that the operator accessed within Pathway.

It will only allow selection of Classes that the operator is authorised to.

Examples

Display Licences of a specific 'Type' (example Cooling Towers) to enable Tasks to be added for Inspections



This involves making a selection in the GIS Product and activating the Display Other Module command. Pathway will respond by prompting for the module. Selecting the Licensing Module and then clicking on OK will present the Licence GIS Filter. Entering the Class, Type and any other selection criteria then clicking on OK will result in only those Licences matching the filter criteria and matching the selection made on the map, being displayed.

Creating a Pathway Licence Query to use over the Licence Reports/Report Entities



This involves making a selection in the GIS Product and performing the Create Other Module Query command. A 'description' must be given to enable the Pathway Query to be identified later. Selecting the Licence Module and then clicking on OK will present the Licence GIS Filter. Entering the Class and other relevant filter criteria and then clicking on OK will create the Pathway Query. From the relevant Licence Report option, the newly created Query can then be selected.

Display on Map, the properties selected from any Licence Select, Summary or other Form



From a Licence Select Form, one or many Licence records can be selected and the Map Button taken. The polygons of the Properties linked to the selected Licence records will be displayed on the Map.

Form the Licence Summary Form, double clicking the World icon will display the linked Map polygon.

From the Locations option within Licence Maintenance or Enquiry, one of the Locations can be selected and a double click on the World icon will display this record on the Map.

From the Inspections Option, an Inspection can be selected and double click on the World icon will display the location/s linked to the Inspection on the Map.

From a Pathway generated Licence Query, display results on the Map

Using standard Pathway Query function, a Licence Query with results can be selected, via the "Display Query on GIS" menu option within the Query menu structure. This option will then display the matching GIS record to all records in the Query on the Map.

Animal Control

Animals GIS Filtering

The following form will appear when selecting the Animal module after performing a Display Other Module or Create Other Module Query command in the GIS Product:

Animal Type	D	>>	DOG REGISTRATIONS
Animal Breed Code	BEAGLE	>>	BEAGLE
Reg. Class Code		>>	

OK Cancel

Examples

Display selection from Map in Animal Maintenance or Enquiry to locate owners of particular Breeds



Where the owners of a particular breed are to be identified within a geographical area, that area would be highlighted on Map. The Display Other Module would then be activated and the Animal Module selected. The Animal Type and Breed would be entered and OK taken. This would display the Animal records in Pathway matching on Map selection and Filter criteria.

Creating a Pathway Animal Query to use over the Animal Report



This involves making a selection in the GIS Product and performing the Create Other Module Query command. A 'description' must be given to enable the Pathway Query to be identified later. Selecting the Animal Module and then clicking on OK will present the Animal GIS Filter. Entering the relevant filter criteria and then clicking on OK will create the Pathway Query. From the Animal Report option, the newly created Query can then be selected.

Display on Map, the properties selected from any Animal Select or Summary Form



From the Animal Select Form, select one or many Animal records and take the Map Button to display the properties linked to the Animal records on the Map.

Form the Animal Maintenance Form, double clicking on the World icon will take the operator to the Map displaying the polygon of the property linked to the Animal record.

From a Pathway generated Application Query, display results on the Map

Using standard Pathway Query function, an Animal Query selecting (unregistered Animals as an example) can be generated and then using the "Display Query on GIS" menu option within the Query menu structure, display all records on the Map. This could then allow a planned doorknock to check existence of animals and perhaps raise Infringement tickets.

Infringements

Infringements GIS Filtering

The following form will appear when selecting the Infringement module after performing a Display Other Module or Create Other Module Query command in the GIS Product:

The Type will default from any previous selection or from the last Type that the operator accessed within Pathway.

It will only allow selection of Types that the operator is authorised to.

The following is an overview of what can be achieved between the Pathway Infringement module and GIS:
From Map

- Access one or many Infringements in Pathway from the GIS. Note: only those records linked to either a Property or a Street are available for use in this interface. Street linked records can only be used where a Street Layer has been defined within the Map and the Pathway GIS Parameters.
- Create a Pathway Infringement Query from GIS polygon selection and using Filters to further define criteria. Query can then be used to produce standard Pathway Infringement Reports and/or Notices.

From Pathway

- From the Infringement Summary Form or Select Forms in Pathway display selected polygons on Map
- Create a Pathway Infringement Query and using the "Display Query on GIS" menu option within Query menu structure, display results on the Map.

Customer Service

Customer Service GIS Filtering

The following form will appear when selecting the Customer Service module after performing a Display Other Module or Create Other Module Query command in the GIS Product.

The following is an overview of what can be achieved between the Pathway Customer Service module and GIS:

From Map

- Access one or many Customer Service records in Pathway from the GIS. Note: only those records linked to either a Property or a Street are available for use in this interface. Street linked records can only be used where a Street Layer has been defined within the Map and the Pathway GIS Parameters.
- Create a Pathway Customer Service Query from GIS polygon selection and using Filters to further define criteria. Query can then be used to produce standard Pathway Customer Service Reports.

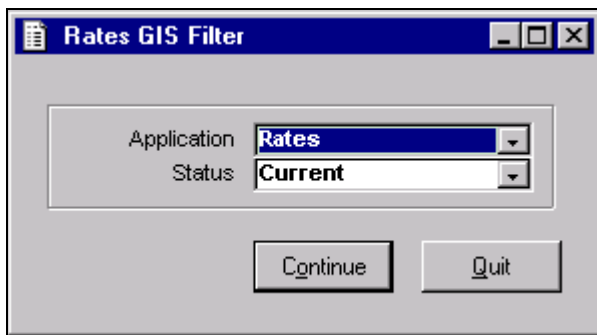
From Pathway

- From the Customer Service Summary Form or Select Forms in Pathway display selected polygons on Map
- Create a Pathway Customer Service Query and using the “Display Query on GIS” menu option within Query menu structure, display results on the Map.

Rates Accounting / Water Billing

Rates GIS Filtering

The following form will appear when selecting the Rates module after performing a Display Other Module or Create Other Module Query command in the GIS Product:



Examples

Display current assessments from a selection on the map



This involves making a selection in the GIS Product and activating the Display Other Module command. Pathway will respond by prompting for the module. Selecting the Rates Module and then clicking on OK will present the Rates GIS Filter. Entering the Application (Rates, Water Billing or Special Rates and Charges) and Status then clicking on OK will result in only those Assessments matching the filter criteria and matching the selection made on the map, being displayed.

Creating a Pathway Rates Query to use in Bulk Maintenance to add a new Rate Type



This involves making a selection in the GIS Product and performing the Create Other Module Query command. A 'description' must be given to enable the Pathway Query to be identified later. Selecting the Rates Module and then clicking on OK will present the Rates GIS Filter. Entering the Application and Status (should always be Current in this situation) and then clicking on OK will create the Pathway Query. From the Rates Bulk Maintenance option, use this Query and apply the new Rate Type as per standard processing.

This process could be used for any other bulk maintenance, where the location of the assessment is relevant to the maintenance being performed.

Display on Map, the properties selected from any Rates Select or Summary



From a Rates Select Form, one or many Assessment records can be selected and the Map Button taken. The Properties linked to the selected Assessment records will be displayed on the Map.

Form the Rates Summary Form, double clicking the World will display the linked Property on the Map.

From a Pathway generated Rates Query, display results on the Map

Using standard Pathway Query function, a Rates Query with results can be selected, via the "Display Query on GIS" menu option within the Query menu structure. This option will then display the matching GIS record to all records in the Query on the Map.

Other Functionality

It is possible, using the GIS and Query functions, to use one Pathway module Query to generate a Query in another Pathway module.

Example 1



Create a Query over Property using Zone or Land Use. This can be used to display the relevant polygons on the Map.

Once records are highlighted in the Map, choose the Other Applications Query icon, enter Description and select Rates.

This will then generate a Rates Query using the selected polygons on the Map.

This Query can then be used to perform Bulk Maintenance on the relevant Assessments.

Example 2



Alternatively, you may wish to send a letter to the Property Owners, of all Properties where an Assessment has a particular Rate Type.

Create a Rates Query, using the relevant Rate Type as the conditioning criteria.

Use the Query to display the relevant polygons on the Map.

Once records are highlighted in the Map, choose the Other Applications Query icon, enter Description and select Property and enter required filter criteria.

This will then generate a Property Query using the selected polygons on the Map.

This Query can then be used in Property Miscellaneous Notices to issue a Notice/letter to property owners.