Licensing User Guide

Feedback
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Pathway 3.09 (Thick Client Version)

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LICENSING USER GUIDE

Overview

The Pathway Licensing Application is fully integrated within the Pathway system and forms part of the Land Information System.

The Licensing System integrates with the following Pathway sub-systems:

- Name and Address
- Property
- Receipting/General Ledger Interface
- Memo
- Responsibility
- Trade Waste
- Inspections
- Application

Licensing receives and processes applications to carry out activities requiring initial and ongoing Council approval. It also provides the facility of recording Licences and Permits where, on a periodical basis, Renewals are produced; a fee paid and permits generated. The system allows for various types of Licences and provides the following:

- Recording of Licence details and allocation of Conditions
- Calculating and Recording of Fees
- Scheduling and Recording of tasks to be carried out, eg reminders and inspections
- Printing and issuing of the Licence
- Printing of Standard Letters, Renewals and Reminders
- Statistical Reporting

Tax Processing

The GST requirements are such that when debts are raised, adjusted, written off, there are implications for GST. When payments are received, allocated, transferred, reversed there are also implications for GST. The financial transactions generated are to be used to prepare the tax returns and provide details of cash movement for both the current return plus historical audit information. The Pathway GST development does not cover this component, however it ensures that all tax entries generated are correct based on cash and accrual movement as generated by the Pathway PPR modules.

GST is defined by a percentage that could differ for specific goods and services and also could change in the future. As such provision for multiple tax rates per Tax Code has been made, however the use of 'effective' dates in determining which rate to use has not been implemented. When a new GST rate is announced (Australia or New Zealand), the processing requirements will be reviewed and changes implemented where necessary. To assist in reconciliation of returns and the General Ledger, it may be required to hold multiple Tax accounts therefore optional set up of specific Tax Codes per Pathway PPR module is provided.

Not all transactions generated within Pathway or within an individual Pathway module, are tax applicable and as such the control needs to be at the appropriate level to control this process. This is explained further in this document.

In most Pathway modules, the fee or rate that is defined is deemed to be inclusive of Tax and therefore the tax transaction generated is calculated on this amount (1/11 for 10% or 1/9 for 12.5% of fee/rate amount). The exception to this is for Applications, Licensing and the Accounts Receivable modules, where the operator can nominate whether the fee or rate entered is inclusive or exclusive of tax.

Rounding parameters are also available to control the calculation of the Tax.

NOTE: NEW ZEALAND TAX CHANGES - MISCELLANEOUS RECEIPTS
Changes have been made to the Reversal and Transfer Receipting functions for Miscellaneous Receipts. These functions now use the GST rate that was applicable at the time when the Miscellaneous Receipt was created, which results in the correct tax amount being calculated and written to the generated transaction records.

NOTE: NEW ZEALAND TAX CHANGES - USER-DEFINED RECEIPT TYPES
Changes have been made to the Reversal and Transfer Receipting functions for User-defined Receipt Types. These functions now use the GST rate that was applicable at the time when the User-defined Receipt was created, which results in the correct tax amount being calculated and written to the generated transaction records.

NOTE: NEW ZEALAND TAX CHANGES - BOOKINGS
Enhancements have been made to the Bookings module to cater for a change in GST scheduled to occur on the 1st of October 2010.
The Bookings module has been modified to calculate the tax rate applicable to a Booking based on the earliest transaction date for the booking line. All fees and adjustments for the Booking will have tax calculated at this tax rate except where the new 'Tax Override' flag is turned on for the Fee Code, see below for details. The earliest transaction date being the date the first fee was added to the booking line.

NOTE: NEW ZEALAND TAX CHANGES – ANIMAL REGISTRATION
Changes have been made to the Reversal and Transfer Receipting functions for Animal Receipts. These functions now use the GST rate that was applicable at the time when the Animal Receipt was created, which results in the correct tax amount being calculated and written to the generated transaction records.

NOTE: NEW ZEALAND TAX CHANGES - ACCOUNTS RECEIVABLE
Changes have been made to the Reversal and Transfer Receipting functions for Accounts Receivable (AR) Receipts. These functions now use the GST rate that was applicable at the time when the Account Receivable Receipt was created, which results in the correct tax amount being calculated and written to the generated transaction records.

NOTE: NEW ZEALAND TAX CHANGES - GENERAL LEDGER RECEIPTS

Changes have been made to the Reversal and Transfer Receipting functions for General Ledger (GL) Receipts. These functions now use the GST rate that was applicable at the time when the General Ledger Receipt was created, which results in the correct tax amount being calculated and written to the generated transaction records.

NOTE: NEW ZEALAND TAX CHANGES – EXTERNAL RECEIPT IMPORTS INCLUDING MSF
Enhancements have been made to the External Receipt Import batch function to calculate the correct GST amount for external Receipts that include Merchant Service Fees. The tax rate that is used in calculating the GST for Merchant Service Fees will be the rate that was applicable on the date of the external Receipt.

Councils are required to ensure the following tasks are performed prior to 01/10/10 in order for the earliest transaction date to produce the same tax rate as the earlier of payment and invoice date.

- Councils must ensure that any Fees added to a booking before 01/10/10 are transferred to Debtors (where applicable) and invoiced before 01/10/10, otherwise the fees must be removed from the Booking. Fees added before 01/10/10 will initiate a time of supply prior to 01/10/10. This results in a tax rate of 12.5% being applied to the booking.

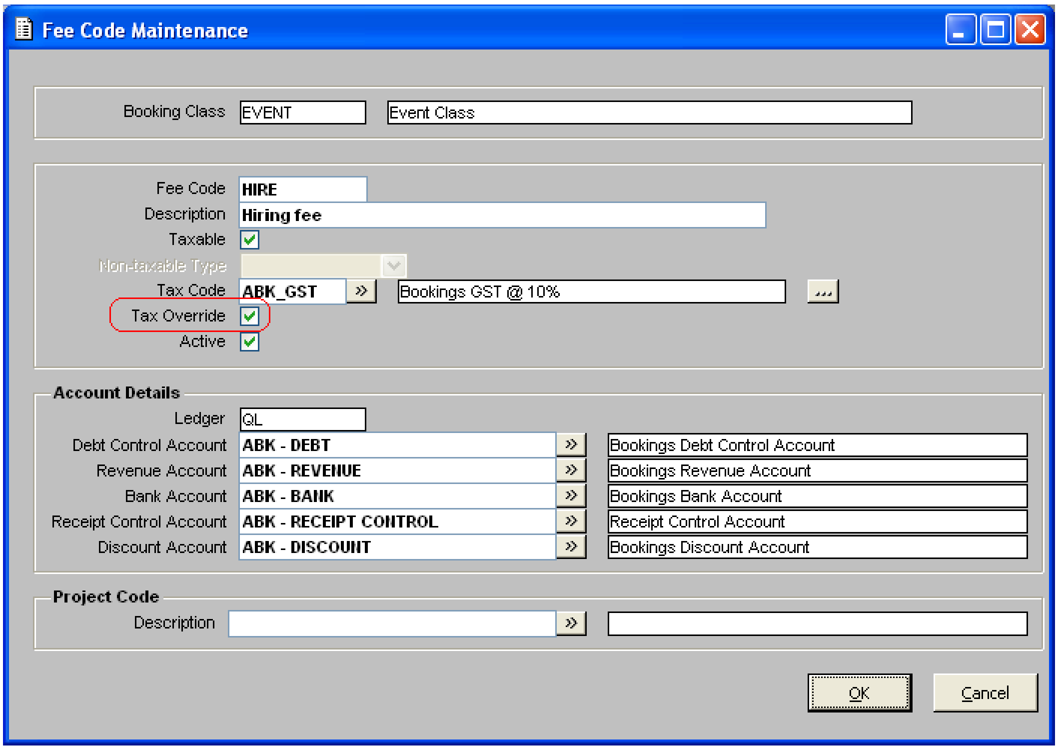
  Fees added prior to 01/10/10 but invoiced on or after 01/10/10 will NOT be cater for and will result in a tax rate of 12.5% being applied instead of the 15% required by the time of supply.

Councils must ensure the following business practices are followed in regards to Bookings.

- Adjustments to Bookings with an Accounting Method of 'Pathway Debtors' must be made from the Booking then transferred to Debtors. Adjustments must not be made directly to the debtor.

Booking Parameters

A new parameter called *Tax Override* has been added to the Booking Fee Code Maintenance form.



Fee Code Maintenance form showing the new Tax Override flag

Fees with the *Tax Override* flag turned on will have tax calculated based on the date the fee was added to the booking instead of the date the first fee was added to the booking.

Tax Calculation

A booking line with fees added before 01/10/10 will be taxed as follows:

- New fees added on or after 01/10/10 that have the Tax Override flag turned OFF will be taxed at 12.5%.
- New fees added on or after 01/10/10 that have the Tax Override flag turned ON will be taxed at 15%.

- Adjustments made to fees added before 01/10/10 will be taxed at 12.5%.
- Adjustments made to fees added on or after 01/10/10 will be taxed at the tax rate that was applicable to the original fee. If the fee has the Tax Override flag turned ON then this would be 15%, if the fee has the Tax Override flag turned OFF then this would be 12.5 %

Booking lines that do NOT have fees added before 01/10/10 will be taxed as follows

- New fees that are added on or after 01/10/10 will be taxed at 15% regardless of whether the Tax Override flag turned on or off.
- All adjustments will be taxed at 15%.

Receipt Reversals will calculate tax using the tax rate applicable to the fee/debt that the payment was allocated to.

Receipt Transfers will calculate tax using the tax rate applicable to the fee/debt being transferred from/to.

Example:

Booking Date	Fee	Transaction Date	Tax Override	Amount	Tax Rate%
01-Oct-2010	Fee 1	01-Sep-2010	OFF	100	12.50
	Fee 2	01-Oct-2010	OFF	50	12.50
	Fee 3	01-Oct-2010	ON	50	15.00
01-Nov-2010	Fee 1	01-Sep-2010	OFF	100	12.50
	Fee 2	01-Oct-2010	OFF	50	12.50
	Fee 3	01-Oct-2010	ON	50	15.00
01-Dec-2010	Fee 1	01-Nov-2010	OFF	100	15.00
	Fee 2	01-Nov-2010	OFF	50	15.00
	Fee 3	01-Nov-2010	ON	50	15.00

Booking for October and November taken before 01-Oct-2010 and Fee 1 added attracting a tax rate of 12.5%.

Fee 2 and 3 add to each booking after 01-Oct-2010. Fee 2 has the Tax Override off so attracts a tax rate of 12.5%. Fee 3 has the Tax Override on so attracts a tax rate of 15%.

Additional booking date for December added after 01-Oct-2010. Time of supply is taken from the transaction date of the first fee on the booking line i.e. 01-Nov-2010. So fees with the Tax Override off and on are taxed at 15%.

The above occurs whether the fee is a booking or activity fee.

USER-DEFINED RECEIPT TYPES
As of Release 3.02, User defined Receipt Types use the GST rate that was applicable at the time when the User-defined Receipt was created, which results in the correct tax amount being calculated and written to the generated transaction records.

Global Tax Control

Many Tax Codes can be created that can then be applied within the various parameters within Pathway PPR.

The Tax Codes hold both the tax rate and the tax accounts which allows for the retrieval of the accounts and rate for Tax to be from the global Tax Code table, rather than at each module/fee/transaction level. This will minimise set up, and maintenance should the accounts need to be changed.

Accounts

Accounts required for each Tax Code established are: -

Tax Accrual Account
Tax Accrual Reversal Account
Tax Cash Account

Tax Accrual Account

This account will carry the Tax transactions generated for applicable 'debt' entries. These transactions would be generated by Pathway modules such as:

Rates
Water Billing
Infringements (if running in accrual mode)
Licensing (if running in accrual mode)
Applications (if running in accrual mode)

For those sites controlling and reporting GST at an accrual level (where debts are raised), this account will be the main control account used in determining returns.

Tax Accrual Reversal

The Tax Accrual Reversal Account is required to ensure that where an organisation is processing GST under accrual, the impact of Cash entries does not affect the ability to reconcile and prepare returns.

This account will receive entries generated by cash payments being allocated to Tax applicable debts; (those debts generated by the accrual Pathway modules noted above).

Those sites controlling and reporting GST at an accrual level (where debts are raised) MUST set this to a different account than the Tax Accrual.

Tax Cash Account

This account will carry the Tax transactions generated for ALL cash entries. Cash entries will be generated for any payment that is associated with a tax applicable fee, code, rate, account etc.

The transactions are generated by each Pathway module when the Receipt is initially allocated, or re-allocated.

For those sites controlling and reporting GST purely at a cash level for all modules (as per the current New Zealand procedures) this account will be the main control account used in determining returns.

Important: For those sites controlling and reporting GST at an accrual level (where debts are raised), it is critical that this account be set as follows:

- to that of the Accrual Reversal account for Tax Codes allocated to the debt modules

and

- to the appropriate Tax Cash account for the non-accrual type modules.

Non Accrual Modules:

- Applications (operating in cash mode)
- Licensing (operating in cash mode)
- Infringements (operating in cash mode)
- Animals
- Registers
- Miscellaneous Receipts
- GL Receipts
- Accounts Receivable (external)

Rounding

The ability to nominate the Rounding amount and process is provided as Up, Down, Nearest or None. The Rounding is at the Global level and not at the Application Level.

Note: The rounding amount will apply to each individual tax calculation and whilst the rounding that may apply to the amount returned to the Taxation Department may be whole dollars, this will not be applicable at this level. It is recommended that it be set to a low value such as .05 or .10. Where an individual tax amount is calculated to be less than the rounded amount, no tax entry shall be generated***

Where Rate is GST applicable, this rounding amount should NOT be set higher than Rates. This is required given the high occurrence of small tax cash entries being generated as a result of multiple Rate Types and proportionate apportioning of payments.

Effective Dates

Each Tax Code has the ability to record Effective Dates for each Tax Code and multiple rates for the Tax Code. Please note that the latest Effective Date, where it is equal to or less than the current system date, is the rate that is applied when processing.

As such, it is CRITICAL that when setting up the Tax Codes in preparation for GST, the Effective Date MUST be set to 1st July 2000. This allows the parameters across all modules to be set up without the risk of GST being generated prior to the 1st July.

Use of Multiple Tax Codes

Multiple Tax Codes will be required for the following reasons:
Where sites need to control and report Tax at Accrual Level
Tax Codes will need to be different for accrual modules and cash modules

Where internal reconciliation or management/tax reporting is required at module level
If reports are required that show how much tax has been generated or received for a particular Pathway application (i.e. Rates, Applications etc).

Overpayments and Prepayment Parameter set up
In some situations under Cash processing, all payments are considered to be tax applicable, (only where the system parameter for the specific Pathway module is Taxable) until they are allocated to a non-tax fee/debt/account etc. Therefore all overpayments and pre-payments will generate tax entries upon receipt of payment and then re-calculate once the payment has been allocated.

Refer to notes within each section on recommendations.

General Examples of Tax Calculations and Ledger Entries

Examples using ‘Rounding = Nearest and .05’

Accrual Module (eg Rates)

Debt Raised for $100 and Tax deemed to be applicable at 10%

Credit Revenue Account	90.90	
Credit Tax Accrual Account	9.10	(calculated 1/11 of 100.00 and rounded)
Debit Control	100.00	

Payment Received for $100 and allocated to taxable debt (as above)

Credit Control Account	100.00	
Credit Tax Cash Account	9.10	(calculated 1/11 of 100.00 and rounded)
Debit Tax Accrual Reversal Account	9.10	
Debit Bank Account	100.00	

Cash Module (eg Miscellaneous Receipts)

Miscellaneous Receipt Type set up as Taxable

Receipt generated for $100.00

Credit Revenue Account	90.90	
Credit Tax Cash Account	9.10	(calculated 1/11 of 100.00 and rounded)
Debit Bank Account	100.00	

Modules where Tax can be ‘Exclusive’ (eg: Applications, Licensing, future Debtors)

Fee Code calculations or Rate Type specified as Tax Inclusive/Exclusive = Exclusive

‘Inclusive’ function as above examples.

Parameter or system calculated Fee = $100

Credit Revenue Account	100.00	
Credit Tax Cash Account	10.00	(calculated 10% 100.00 and rounded)
Debit Bank (cash mode)	110.00	

Or

Credit Revenue Account	100.00	
Credit Tax Accrual Account	10.00	(calculated 10% 100.00 and rounded)
Debit Control (accrual mode)	110.00	

Overpayment or Pre-Payments (eg: Rates, Applications, Licensing and Infringements)

Payment of $100 received

Credit Overpayment or Pre-payment	100.00	
Credit Tax Cash Account **	9.10	(calculated 1/11 of 100.00 and rounded)
Debit Tax Clearing Account **	9.10	(calculated 1/11 of 100.00 and rounded)
Debit Bank Account	100.00	

** These two accounts are effectively the Tax Accrual Reversal and Tax Cash Accounts as set up on the Tax Codes. However the Tax Codes that are linked to Overpayment or Pre-payment parameters, MUST be considered differently.

The Tax Cash Account will be the valid Tax Cash Account for the module, if you are required to assume tax is applicable on overpayments and pre-payments. If you are able to wait until this payment is allocated before determining tax liability, then this account should be a ‘Clearing’ account.

The Tax Clearing Account will always be a ‘Clearing’ account.

Allocation of Overpayment or Pre-Payments

Payment of $100 now allocated to a taxable debt

Debit Overpayment or Pre-payment	100.00	
Debit Tax Cash Account **	9.10	
Credit Tax Clearing Account **	9.10	
Credit Bank Account	100.00	
and		
Credit Control Account (accrual module)	100.00	
Credit Tax Cash Account	9.10	(from Tax Code applicable to Debt)
Debit Tax Accrual Reversal Account	9.10	(from Tax Code applicable to Debt)
Debit Bank Account	100.00	
Or		
Credit Revenue Account (cash mode)	90.90	
Credit Tax Cash Account	9.10	(from Tax Code applicable to charge)
Debit Bank Account	100.00	

Payment of $100 now allocated to a non-taxable debt

Debit Overpayment or Pre-payment	100.00	
Debit Tax Cash Account **	9.10	
Credit Tax Clearing Account **	9.10	
Credit Bank Account	100.00	
And		
Credit Control or Revenue Account	100.00	
Debit Bank Account	100.00	

Receipt Reversals
Receipt Reversals will reverse both the standard Receipt Ledger entries AND any Tax entries that were generated as a result of the processing of the receipt.
Receipt for $100 allocated to a Taxable Fee in a Cash Module
Reversal entries

Debit Revenue Account	90.90
Debit Tax Cash Account	9.10
Credit Bank Account	100.00

Receipt for $100 allocated to a Taxable Fee in an Accrual Module
Reversal entries

Debit Control Account	100.00
Debit Tax Cash Account	9.10
Credit Tax Accrual Reversal	9.10
Credit Bank Account	100.00

Refunds
Processing of Refunds within a module that is Taxable = ON must be managed in a certain way to guarantee the correct tax ledger entries. Currently Pathway only supports Refunds within Rates and Water Billing, however the same logic will be applied to future refund processing within Applications and Licensing modules.

Refunds can be apportioned to a Receipt or a Credit and the following examples show the impact on Tax for both situations.

Refund of $100 allocated to a Taxable Credit

Debit Rates Control Account	100.00	(Control Account applicable to Credit transaction)
Credit Tax Accrual Account	9.10	
Debit Tax Cash Account	9.10	
Credit Refund Account	100.00	

Crediting the Tax Accrual, is reversing out the entries generated by the actual credit transactions
Debiting the Tax Cash, assumes that at some tine a payment was received, that ultimately caused the credit entry to be subsequently generated.

Note: It is uncommon for a Refund to be allocated to a Credit. In current Pathway modules and future refund processing, a Refund will always allocate to a payment first and only when the refund amount exceeds the amount of all receipts on the record (Assessment, application, license etc) will it be treated as a refund of a credit. In some situations a refund could be allocated partly to receipts and partly to credits.
The main example of a credit refund in Rates is where a Previous Period Rebate is processed (and the assessment was fully paid at year-end) and a refund is required as opposed to allowing the credit to simply reduce the balance payable. Or indeed, where the Previous Period Rebates cover many years and exceed the current year’s rates.

Refund of $100 allocated to a Payment
Generated when RFND Journal entered

Debit Refund Suspense Account	100.00
Credit Refund Clearing/Control	100.00

Generated when Refund apportioned to Receipt

Debit Overpayment Account	100.00
Credit Overpayment Bank Account	100.00
Debit Overpayment Tax Cash Account	9.10
Credit Overpayment Tax Clearing Account	9.10
Debit Refund Bank Account	100.00

Credit Refund Suspense Account	100.00	
Debit Refund Tax Clearing Account	9.10	Uses the O'payment Accounts
Credit Refund Tax Cash Account	9.10	Uses the O'payment Accounts

Note: Even if the receipt is not an overpayment, the refund process will unallocate from any debt and force the receipt into overpayment. The refund entries are then allocated to the overpayment.
As such, re-activation entries will be generated reversing out the allocation entries and generating overpayment entries. This caters for non tax and taxable debt transactions.

Re-activation of a Receipt to be refunded that was allocated to a taxable debt:

Debit Control Account	100.00
Debit Tax Cash Account	9.10
Credit Tax Accrual Reversal Account	9.10
Credit Bank Account	100.00
Credit Overpayment Account	100.00
Credit Overpayment Tax Cash Account	9.10
Debit Overpayment Tax Clearing Account	9.10
Debit Bank Account	100.00

Re-activation of a Receipt to be refunded that was allocated to a non-taxable debt:

Debit Control Account	100.00
Credit Bank Account	100.00
Credit Overpayment Account	100.00
Credit Overpayment Tax Cash Account	9.10
Debit Overpayment Tax Clearing Account	9.10
Debit Bank Account	100.00

Result is the same once it is in Overpayments.

Effectively the final result of a Refund, is a debit balance in the Refund Control Account and the reversal of Tax entries in Cash Accounts, but leaving a Tax amount in Tax Accrual (only where original debt was taxable that receipt being refunded was allocated).

Payment of Refund cheques processed through Accounts Payable will simply zero out the Refund Control Account, they MUST not generate any further tax.

Summary of Accounting Entries

At any point in time, the Accrual Account will reflect tax applicable to those debts that have been generated, regardless of whether they have been paid.

Tax Cash Account will reflect Tax applicable to payments received for Tax debts or fees/charges, regardless of whether a debt has actually been raised.

Tax Accrual Reversal will reflect the reduction of accrued tax liability based on payments received for debts raised as accrual.

Therefore, given the above example, if a site prepares returns to the Tax Department on an Accrual basis, the Tax Cash Account specified on the Tax Code applicable to Rates (module used in the example, but could be any module operated in accrual mode) would need to be set up the same as the Tax Accrual Reversal Account.

This account WOULD not be the same as the Tax Cash Account used on Cash modules.

The Tax Cash and Accrual Reversal entries for Rates would nett out to zero.

Where a site prepares returns to the tax department on a Cash basis, then the Tax Accrual Reversal Account on the Tax Code applicable to Rates would be set up the same as the Tax Accrual Account.

Thus the Tax Cash Accounts are always used to prepare returns and the Tax Accrual Account will always represent the accrued tax liability.

Ledger entries generated are passed to financial systems as part of the standard General Ledger Interface output and will detail the receipt or application reference that the tax applies to.

The Source Application will be applicable to the type of receipt or debt.

It is recommended that the Tax Accounts set up are different to those used within the Financial System for other modules to enable reconciliation, however this will up to each site.

To assist with reconciliation it is strongly recommended individual Tax Codes and Accounts are created at least initially. If further discussion is required to assist with specific site set up to enable reconciliation, please refer to Infor support consultants.

Non-Taxable Types

A Non-Taxable Type field has been introduced into Pathway to cater for the split between GST Free and Division 81 exemptions. There is a third type called GST Exempt, which may or may not be required within Australia.
The Non-taxable Types are:
N = GST Free
8 = Division 81
X = GST Exempt
I = Input Tax
O = Out of Scope
E = Export Sales
Z = Undefined

Within each module, various rules apply to the way this value is defaulted and used. Where no Non-taxable Types are defined anywhere in a module and the module is Non-Taxable, the default will be assumed as N (GST Free).

This Non-Taxable Type will be output in the 'Taxable' field in the Financial Transaction interface file to be used by the financial systems against the transaction.
Previously this value was either Y(taxable) , N (non-taxable) or blank (balance sheet type entries). It will now be Y, N, 8, X, I, O, E, Z or blank.

Rules that apply per module in relation to where the Module is set to Non-Taxable, are as follows:
Account Numbers

If the Non-taxable type is left blank, it will assume N
If direct GL Receipts are to be used for Division 81 transactions, the relevant Account Numbers MUST be accessed in Account Maintenance and the Non-taxable Type set to 8 (Division 81)
Project Codes
If the Non-taxable type is left blank, it will assume N
If direct Project Receipts (PR) are to be used for Division 81 transactions, the relevant Project Code MUST be accessed in Project Code Maintenance and the Non-taxable Type set to 8 (Division 81)
Misc Receipt Codes
If the Non-taxable type is left blank, it will assume N
If any Misc Receipt Codes are to be used for Division 81 transactions, the relevant Misc Receipt Code MUST be accessed in Receipts/Parameters/Transaction Group Maintenance and the Non-taxable Type set to 8 (Division 81)
User Defined Receipt Application Types
If the Non-taxable type is left blank, it will assume N
Therefore no special set up is required.
External Accounts Receivable - Ledger/Sub Ledger level
If the Non-taxable type is left blank, it will assume N
Therefore no special set up is required.

<u>Animals</u>
Animal Type
If Non-Taxable, the Non-taxable Type should be set to the value that is to apply to all transactions for this Animal type.
We recommend that the Animal Type Parameter is accessed and this value set to N - GST Free.
Animal Class

If all Classes are non-taxable, and all GST Free, then no changes are required at this level, as the system will use the Non-taxable type from the Animal Type.

However, if the Class parameter is accessed and a change made or OK taken, the operator will be forced to nominate the Non-taxable Type.

Operators having access to these parameters should be aware of what Type to apply. Alternatively, access each Class and set to the same Non-taxable type as the Animal Type.

<u>Infringements</u>

If all Infringement Types are Non-Taxable, the Non-taxable Type should be set to the value that is to apply to all Fees and Transactions for each Infringement Type.

Therefore as a minimum, each Infringement Type should be selected In Infringement Type Parameters and the Infringement Type Option selected.

At the System Accounts level, the Non-taxable Type should be set to ‘N’.
At the Fee Account level, the Non-taxable Type should be set to ‘N’.

Note: If the Infringement Type parameters are not accessed and changed at all, they will default a Non-taxable Type value of ‘N’.

Where there is an Infringement Type that is Taxable, but different Fees are Non-Taxable, those Fees should be accessed and the Non-taxable Type set to the required value. (We would assume an ‘N’).

<u>Applications</u>

Normally Applications have a mixture of Taxable and Non-Taxable and our understanding is that Development Contribution Fees may be classed as Division 81.

As such, the following needs to be set up within each Application Class:
Where Class is totally Non-Taxable
Select System Parameters
System Accounts and set Non-taxable Type to required value.
Application Accounts/Fee Accounts and set Non-taxable Type to required value
Application Accounts/Deposit Retained Accounts and set Non-taxable Type to required value
Contribution Accounts/Fee Accounts and set Non-taxable Type to required value
Contribution Accounts/Deposit Retained Accounts and set Non-taxable Type to required value
Where Class is a combination of Taxable and Non-Taxable
Assuming that System, Fee and Contribution Accounts set up indicates Taxable
Select Application Fees
Select all Non-Taxable Fees and select the required Non-taxable Type value.

Note: If all Non Taxable Fees are GST Free, then if parameters not accessed, it will default the Non-taxable Type value of 'N' when generating the Financial transactions.
Select Contribution Fees
Select all Non-Taxable Fees and select the required Non-taxable Type value.
Note: If all Contribution Fees are Non-Taxable, the Class System Parameters should be accessed and Contribution Accounts/Fee Accounts set to Non-taxable Type of N or 8, whichever is to apply.
This then avoids the need to access each Fee individually.

<u>Licensing</u>
Normally Licensing has a mixture of Taxable and Non-Taxable.
As such, the following needs to be set up within each Licensing Class:
Where Class is totally Non-Taxable
Select System Parameters
System Accounts and set Non-taxable Type to required value.
License Accounts/Fee Accounts and set Non-taxable Type to required value
License/Deposit Retained Accounts and set Non-taxable Type to required value
Where Class is a combination of Taxable and Non-Taxable
Assuming that System and License Accounts set up indicates Taxable
Select License Fees
Select all Non-Taxable Fees and select the required Non-taxable Type value.
Note: If all Non Taxable Fees are GST Free, then if parameters not accessed, it will default the Non-taxable Type value of 'N' when generating the Financial transactions.

<u>Rates</u>
Normally Rates is Non-Taxable, however some sites may be raising Legal Fees that are subject to GST.
It is also our understanding that the non-taxable Rates charges are treated as Division 81, therefore the following set up is recommended.

If your site is using Pathway Accounts Receivable, refer to Accounts Receivable set up section., if not, then continue:
a)
If your site <u>is not</u> using Pathway Water Billing
and
If Legal Fees and GST <u>is not</u> being raised, then,
System Parameters
Should be set to Non-Taxable
Select the Non-taxable Type as 8 (Division 81)

No further action is required.
b)
If Legal Fees and GST <u>is</u> being raised, then,
System Parameters
Should be set to Taxable
To achieve GST calculation on Legal Fees alone, a separate Rate Type would have needed to have been set up.
Select all Rate Types other than Legal Fees and set Non-taxable Type to 8 (Division 81)
c)
If your site <u>is</u> using Pathway Water Billing and Legal Fees and GST <u>is not</u> being raised, then.
System Parameters
Should be set to Non-Taxable with Non-taxable Type set to 8 (Division 81)
Select <u>ALL</u>Rates Types (both Water and Rates) and set the Non-taxable type to the relevant value (either 8 – Division 81 or N – GST Free)

Transaction Types – these can be left untouched
Rules that apply are:
Where the Rate Type is Non-Taxable and Transaction Type is Non-Taxable, the Non-taxable Type is retrieved from the Rate Type
Where Rate Type is Non-Taxable and Transaction Type is Taxable, the generated transaction is deemed Non-Taxable and the Non-taxable Type is retrieved from the Rate Type

d)
If your site is using Pathway Water Billing and Legal Fees and GST is being raised, then.

System Parameters

Should be set to Taxable

To achieve GST calculation on Legal Fees alone, a separate Rate Type would have needed to have been set up.

Select all 'Rates' Rate Types other than Legal Fees and set Non-taxable Type to 8 (Division 81)

Select all 'Water' Rates Types and set the Non-taxable type to N (GST Free)

All situations:
Transaction Types
Rules that apply are:
Where the Rate Type is Non-Taxable and Transaction Type is Non-Taxable, the Non-taxable Type is retrieved from the Rate Type.

Where Rate Type is Non-Taxable and Transaction Type is Taxable, the generated transaction is deemed Non-Taxable and the Non-taxable Type is retrieved from the Rate Type.

Where Rate Type is Taxable, but Transaction Type is Non Taxable, then the Non-taxable Type is retrieved from the Transaction Type.

Note: This could apply where Fines are applied to Legal Fees. In this situation, the Transaction Type would be used to determine the Non-taxable Type. If no Type had been assigned, it will default to N.

Pathway Accounts Receivable

Pathway Accounts Receivable share some of the Rates parameters and Accounts Receivable will always have a mixture of Taxable and Non-Taxable transactions. As such, the following set up is recommended:

Rates System Parameters

Should be set to Taxable

Select all Non-Taxable 'Rates' and 'Water' (where applicable) Rate Types and set Non-taxable Type to the relevant value (8 -Division 81 or N – GST Free).

Select all Non-Taxable 'Debtor' Rate Types and set Non-taxable Type to the relevant value.

Transaction Types

Ensure that specific User Generated Transaction Types exist for Invoice, Credit Note and Journals

If any of these Transaction Types have been set to Non-Taxable, then select and nominate the relevant Non-taxable Type value.

The same rules apply to Debtors Rate Type/Transaction Types as per Rates.

Financial Transaction Export
The template does not need to be changed as the existing Taxable Flag field (where previously was output with 'N') will be populated with the relevant Non-taxable Type value (N, 8 or X).

TCS Sites: Where this value is now an 8, the import into TCS has been modified and will accept the 8 and treat as a Division 81 transaction.

Finance One Sites: The 'calculation expression' that is entered on Detail section of the Template field, has been modified to cater for the new values. It will continue to treat the N, Y and blank as per the current process, but it will leave an 8 as an 8 and an X as an X. If values other than this are required, please request Technology One to advise Deirdre Todd in the Infor Adelaide office of the required values.

Tax Control - Licensing

System Accounts (per Class)

Taxable ON/OFF flag - If any charge that is to be raised within this Licensing Class is deemed to be GST tax applicable, then this MUST be set to Taxable.

Where the Taxable Flag is set to ON a valid Tax Code will be required.

The Tax Code defined at this level is that which is to be used for Prepayments and Overpayments. This MUST be a different Tax Code to that of the Fees Accounts.

Where Taxable is set to ‘OFF’ a Non-Taxable Type can be defined, i.e. N=GST Free, 8=Division 81 and X=GST Exempt (applicable to NZ). Please refer to the Tax Processing notes above for details of set-up.

Licensing Accounts

Where the Taxable flag at System Accounts is set to OFF, it is assumed Tax is not applicable at all and as such cannot be overridden at this or Fee level.

Where the Taxable flag at System Accounts is set to ON, then ON is defaulted at this level and a Tax Code can be entered. The Tax Code defined at this level is the normal Tax Code that is to apply to Fees.

Note: If operating in Accrual Mode, this Tax Code MUST be different to the Tax Codes used for Cash modules. Where it is operating in Cash mode and separate Codes are not required for reporting or reconciling, then it can be the same as other Tax Cash Codes.

Fee Codes

Taxable ON/OFF Flag will default from Licensing Accounts.
Can only be overridden to OFF at Fee Code level if Taxable ON/OFF flag is set to ON at the Account level

<u>Inclusive/Exclusive</u>
A further flag to denote whether the Fee calculated is inclusive or exclusive of tax is available at this level. This flag simply controls how the Fee is finally calculated.

Any Fee amount calculated using the standard base and/or dimension rates will have a further GST component added ONLY where the Tax Inclusive/Exclusive flag is set to E (Exclusive).

Where the Inclusive/Exclusive flag is set to I (Inclusive), then the standard base and/or dimension the Fee calculations will assume to have GST incorporated. As such, the amount of GST will be based on a calculation of 1/11 of the total fee amount (rate of 10%) or 1/9 (rate of 12.5%)

Refer to section under General Examples.

Licensing

General Processing

Tax will be calculated using the tax rate on the Tax Code held at the Account Parameter level and where the Taxable flag is ON for the Fee Code.

The Inclusive/Exclusive flag on the Fee Code will be used to determine how the tax is calculated.

The calculated Fee Code amount held on the License will always reflect the total fee (including Tax, where applicable).

Where an ‘adjustment’ is made to a Fee Code, it is assumed that the adjusted amount has included any tax. As such, the final Fee amount will then be used to adjust the tax amount held, using the calculation of 1/11 of fee amount where rate is 10% or 1/9 where rate is 12.5%. (i.e.: Inclusive and exclusive parameters are only used on the initial calculation of the Fee).

Any Tax calculated in either the original Fee calculation/generation or via adjustments will only be passed to the General Ledger, if the Licensing Class is being operated in ‘Accrual’ mode.

Merge fields will include a separate field for the GST Tax amount. Note, that the Fee Amount returned in these fields will always be that shown on enquiry etc (i.e.: with tax included).

Where a Receipt is processed as an Overpayment or Pre-payment AND the System Accounts parameter is set to Taxable = ON, tax will be calculated on the Overpayment or Pre-payment.

Upon receipt of payments, the ‘Tax Cash’ amount is determined from the amount of the receipt that is allocated to the taxable transaction Fee. This caters for part payments and payments allocated across many Fee Codes.

All receipt re-activation (movement/transfers of receipts from one Fee Code to another) will consider the tax implications and generate adjusting tax cash entries where necessary.
eg: if a receipt is re-allocated from a non-taxable to a taxable Fee code, then tax entries must be generated and vice versa.

General Ledger transactions generated will all be sourced LLC (accrual) or LLCR (receipts).

Class Set Up

The following topic is covered in this section:

Licence Classes

Licence Classes

This parameter defines the classes of Licensing that can be processed by Councils.

Examples of Licence Classes could be:-

- Development Licensing

The Licensing System is partitioned by these Classes. This allows different User Groups within a Council to operate their own Licensing System independently of any other User Groups who are also using the System.

All other Licence's Parameters are related to a Class of Licence.

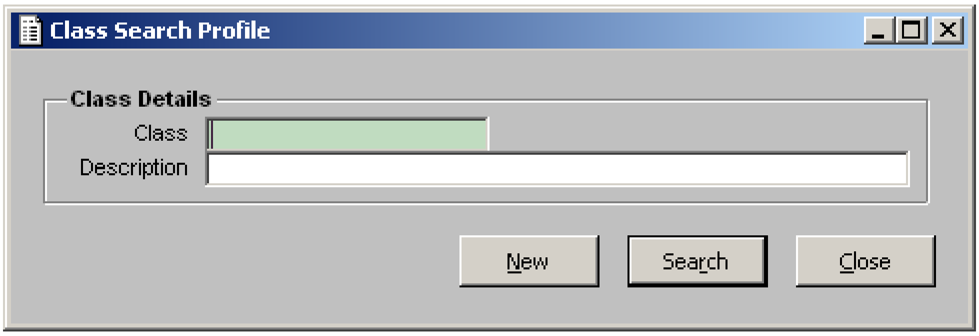
The following functions are available for each Class:-
- Maintenance/Enquiry Options
- Parameter Options

The Class cannot be deleted if it is being used by any other parameter OR it has been defined with Options or Parameters.

Class Search Profile Form

Once the Class Filter Button is selected from the Licensing Menu a Class Search Profile Form allows the addition of a New Class or Search on existing Classes.

The Search Profile allows the entry of a Class Name or Description to be entered in the relevant fields. Then click the select button to search for the Class.

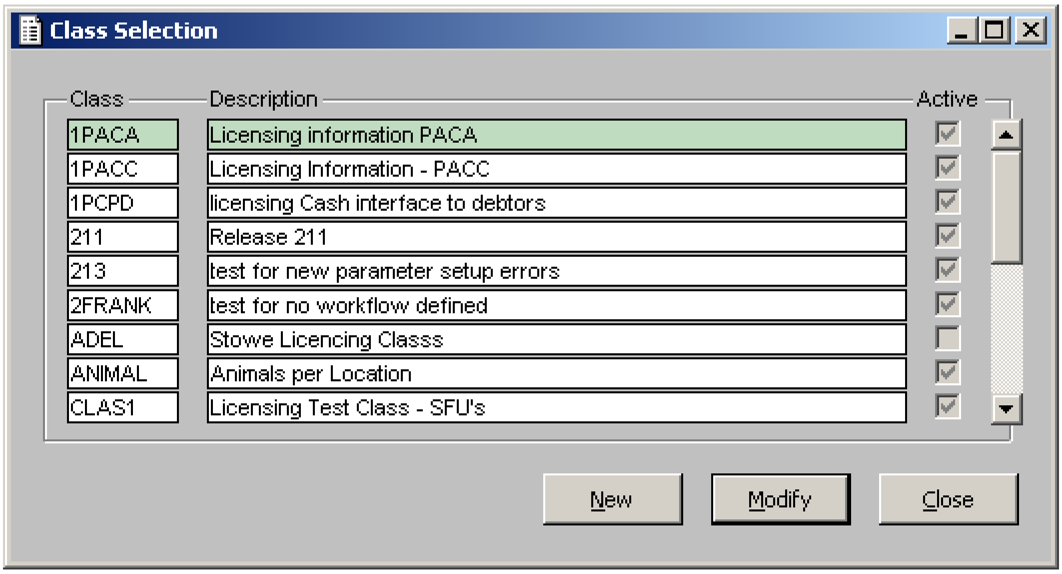


Class Search Profile Form

Clicking on the New Button allows the entry through Class Parameter Maintenance of a new class with the User defined parameters, maintenance/enquiry options and authorities.

Class Selection Form

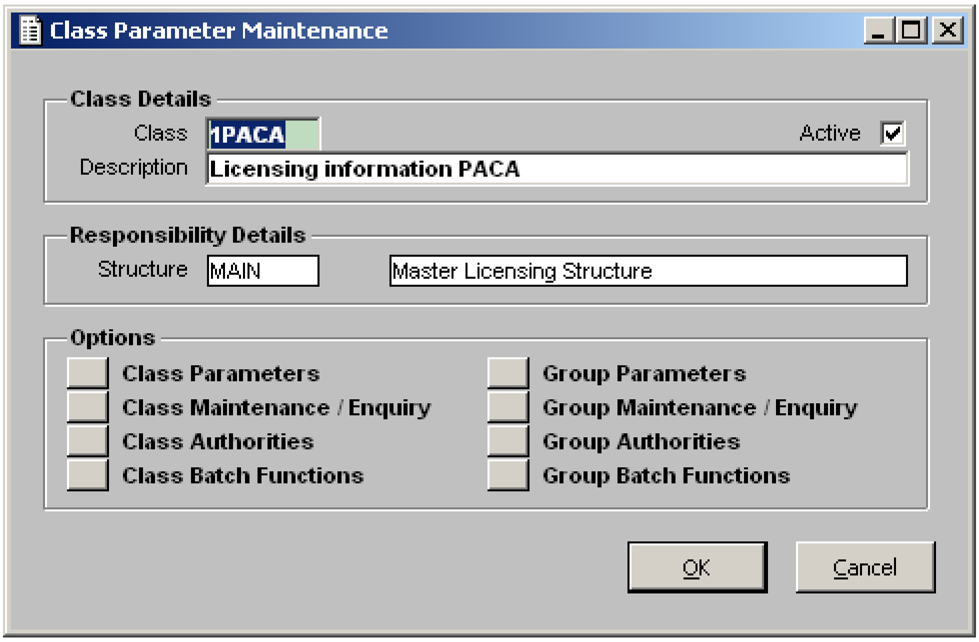
When the Search Button is selected, the Class Selection Form provides a list of previously created Classes and their Descriptions.
From this Form you are able to Modify an existing Class, or add a new Class.



Class Selection Form

Class Parameter Maintenance Form

The Class Parameter Maintenance Form allows the setting of responsibilities for the Users of the Licensing Module. Once Options have been set it is no longer possible for the Responsibility Structure to be changed.



Class Parameter Maintenance Form

Class Details

Class Details require the entry of a 6 digit alphanumeric name for the new Class.
A Description line is provided to give a detailed comment regarding the Class.

Responsibility Details

A Responsibility Structure can be linked to the Class of Licence. The Class then takes on all the privileges of that particular structure selected.

Options

There are 8 Option buttons which contain parameters to be set to allow or disallow specific options for this class.

By selecting these buttons, the Class options available for each council code may be defined. This will define the options which are available to be assigned to the associated Responsibility group.

Class Parameters
Class Parameters default list can be tailored for each Licence Class. The Selected Options can be:-
Re-sequenced or the Descriptions changed.

Selected Parameters can be removed from the list of Class Parameters.

Parameters are added or removed from the Available and Assigned Lists by use of the Remove and Select buttons located in the centre of the form.

A Parameter removed will automatically be deleted from the User Class Maintenance.

Class Maintenance/Enquiry
Class Maintenance and Enquiry allows for the Assignment of Options required, and then the decision made as to whether the options allow the class to Added, Changed or Deleted.

The default list of Options can be tailored for each Licence Class. The Selected Options can be Re-sequenced and the Descriptions changed.

If Selected Parameters are removed from the list of Class Parameters, the parameter will automatically be removed from the User Class Parameters.

Class Authorities
Each Class can assign options with specific authority to each of the functions.
Authority Options are added or removed from the Available and Assigned Lists by use of the Remove and Select buttons located in the centre of the form.
The Secured options available are Yes, No or Password. (Secured function is currently not used and each option should be set to No)

Class Batch Functions
Selecting this button displays a form that is used to assign Licensing Batch Functions to the Licensing Type and in particular, to the responsibility structure that has been previously assigned to the Licensing Type.

The following batch functions are available to the licensing system.

Approval Times Report
Prepayment Report
Print Inspection Letters
Licencing Task Report
Actual Time Task Report
Lost Licence Numbers Report
Food Safety Information Extract
Incentive Fees Report
Update Owners Names Report
Licence Letters
Licence Reminder
Licence Renewal
Overdue Task Report
Print Licence
Print Register Report
Update Next Number and Year
Front End Fees

For more information on any of these batch functions, please consult the relevant section in this User guide.

Group Parameters/ Group Maintenance/ Enquiry/ Group Authorities and Group Batch Functions

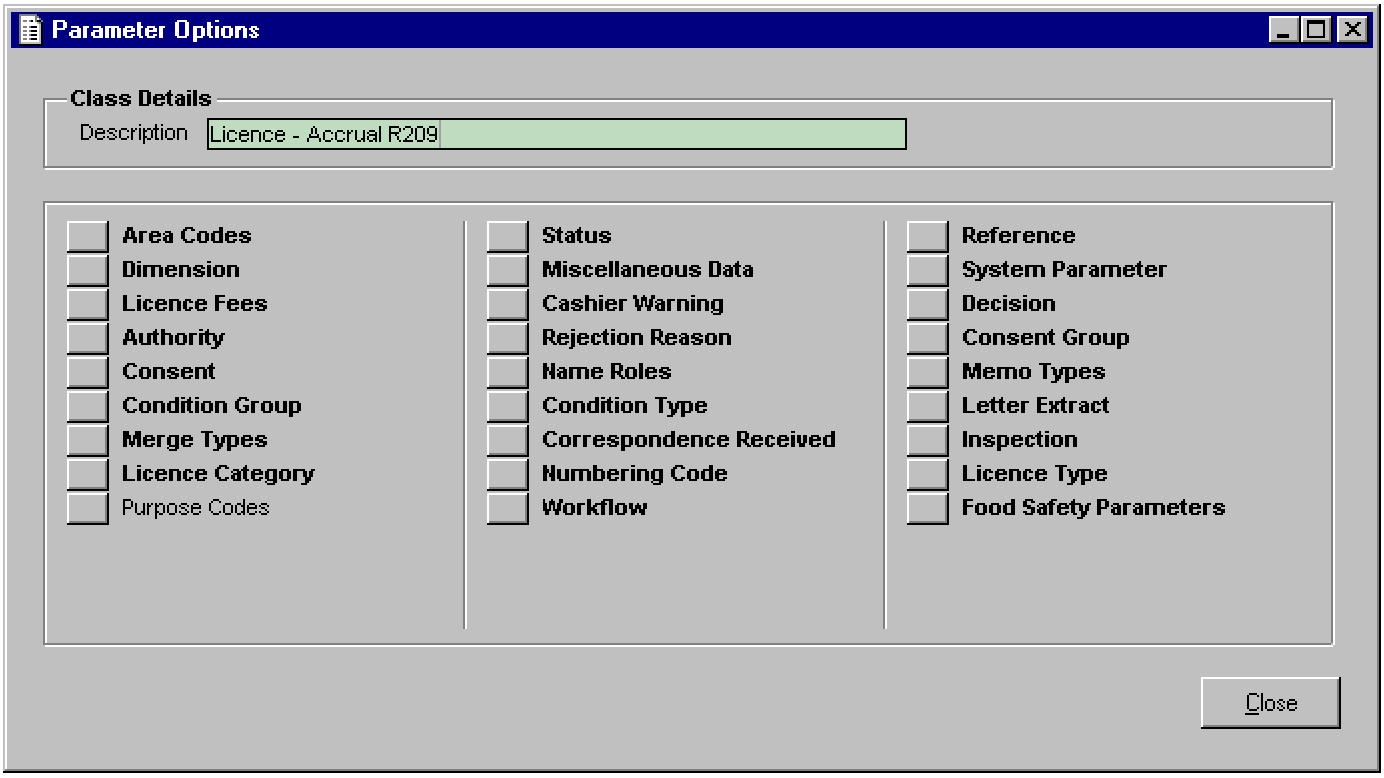
The Options allow the Authorisation of each User within the Council to have access to specific functions within the class. This is part of the Responsibility System and details pertaining to this will be documented in that specific Manual.

Parameters

The following topics are covered in this section:

Parameter Options

Parameter Options Form



Parameter Options Form

Class Details - Description
This field displays the Class Description.

Options Buttons
Select any button to access the relevant Maintenance form.

Area Codes

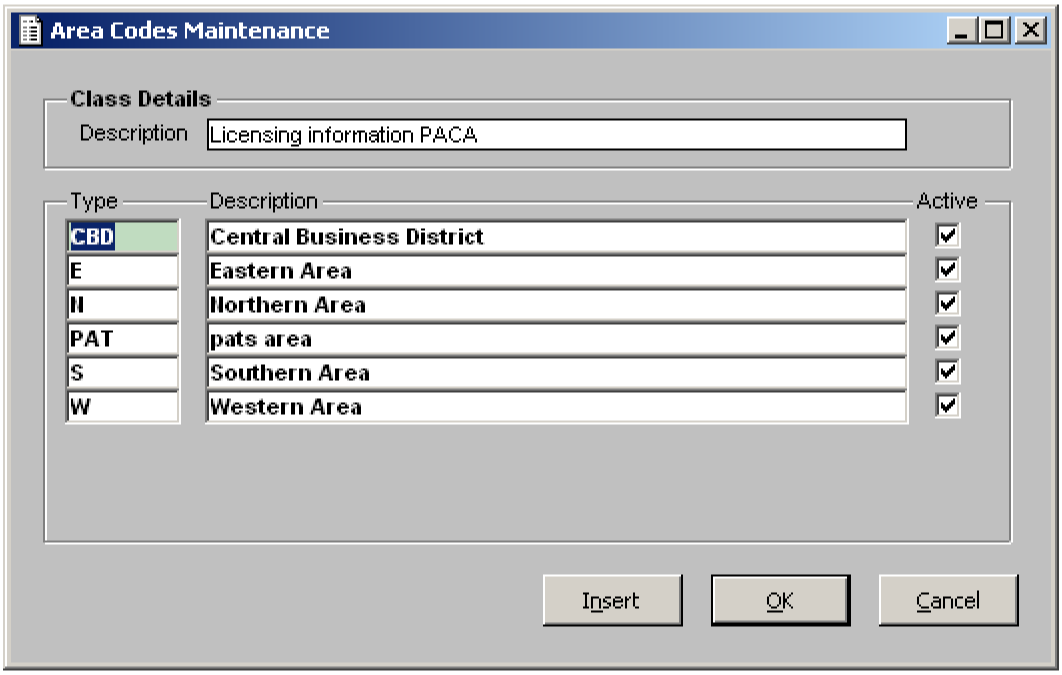
The Area Codes parameter allows your site to assign overrides for User responsibilities. Where branch offices are lodging and maintaining Licensing this parameter may be used to override the system work groups at the branch office level.

Ledger Codes may also be overridden at the Area Codes level.

This parameter is not mandatory, however if a responsibility is to be assigned to a task, at least one area code must be created to assign to the Licence Type and Task Level Responsibility.

Area Codes Parameter Maintenance Form

This form is used to enter your Area Codes (Branch locations).



Area Codes Maintenance Form

Class Details
This field contains the description of the Class of Licence to which you are assigning Area Codes.

This field is display only and may not be maintained.

Type
This field contains the type code you wish to assign to the Area Codes. It may be up to six alphanumeric characters long.

This field is mandatory.

Description
This field contains the description for the Area Codes.

This field is mandatory.

Active
If this box is checked on, the Area Codes will be available for use within the Licensing System.

If this box is checked off the Area Codes will no longer be available for assigning to parameters. Any existing records that use these Area Codes will remain accessible.

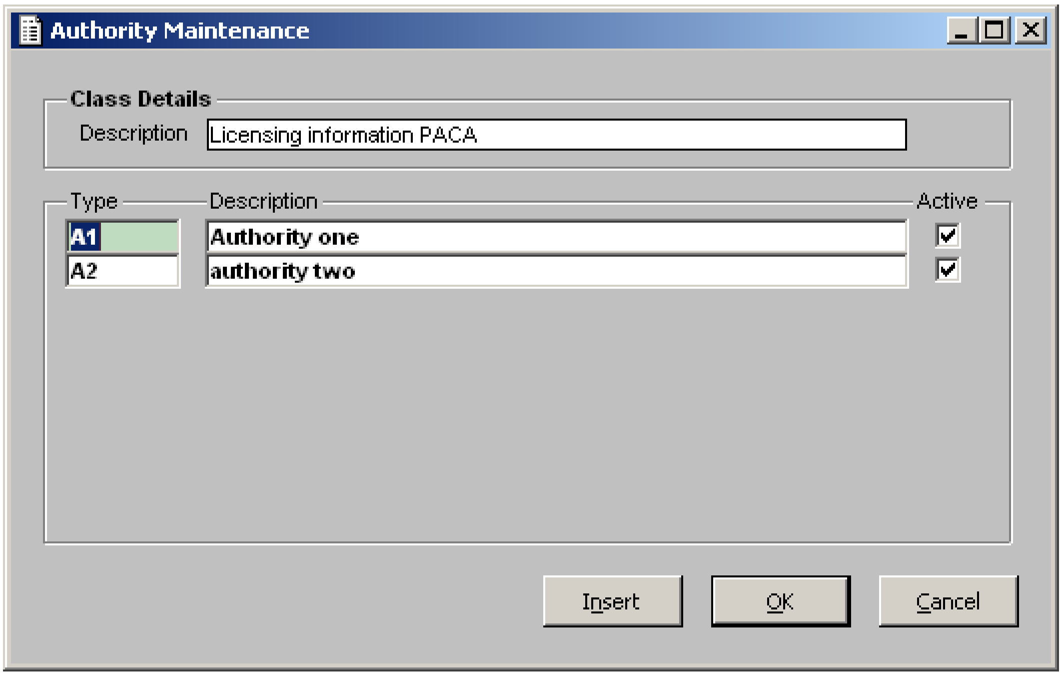
Note: If you make Area Codes inactive it is recommended that you change all other parameters that use these Area Codes. Eg. Licence Type parameter & Task Responsibilities.

Authority

This parameter is used to describe the Authority that either Approved or Rejected a Licence.

Authority Maintenance Form

This form is used to create and maintain Authority descriptions.



Authority Maintenance Form

Class Details
This field contains the description of the Class of Licence to which you are assigning Authority types.
This field is display only and may not be maintained.

Type
This field contains the Authority type code. Up to six alphanumeric characters may be entered.
This field is mandatory.

Description
This field contains the description of the Authority type.
This field is mandatory.

Active
If this box is checked on then the Authority type is available to the system.

If this box is checked off then the Authority type is no longer available to the system. Any existing Licensing with this Authority type will remain as entered. The Authority type will no longer be available for addition to Licensing.

Cashier Warning

Cashier Warning Codes may be added to a Licence to alert a Cashier to a particular problem or query on a Licence. The Warning Codes may be of three different Types:

- Warning Only
- Error
- No Warning.

A Warning only is just an Alert that may require further action, but will still allow the Cashier to proceed with the Receipt. A No Warning will still allow a receipt to proceed, whilst an Error will not allow the Cashier to proceed with the Receipt.

Consent

Consent Parameter

This parameter is required if you wish to use Consent processing.

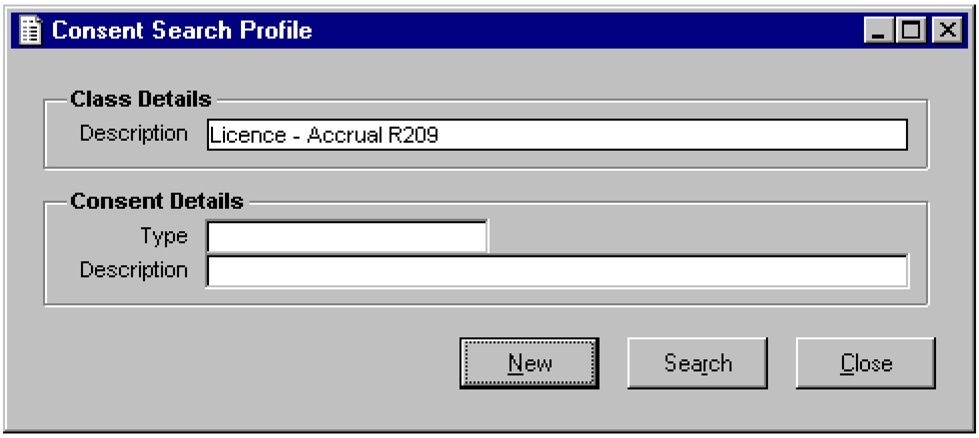
An unlimited number of Consents may be applied to a Licence. Each Consent is subsequently assigned a Decision type.

Consent Search Profile Form

This form is used to enter a Search Criteria on which to base your Search for Consent types.

If no criteria is entered then all Consent Types will be displayed.

To start the search selects the Search Button.



Consent Search Profile Form

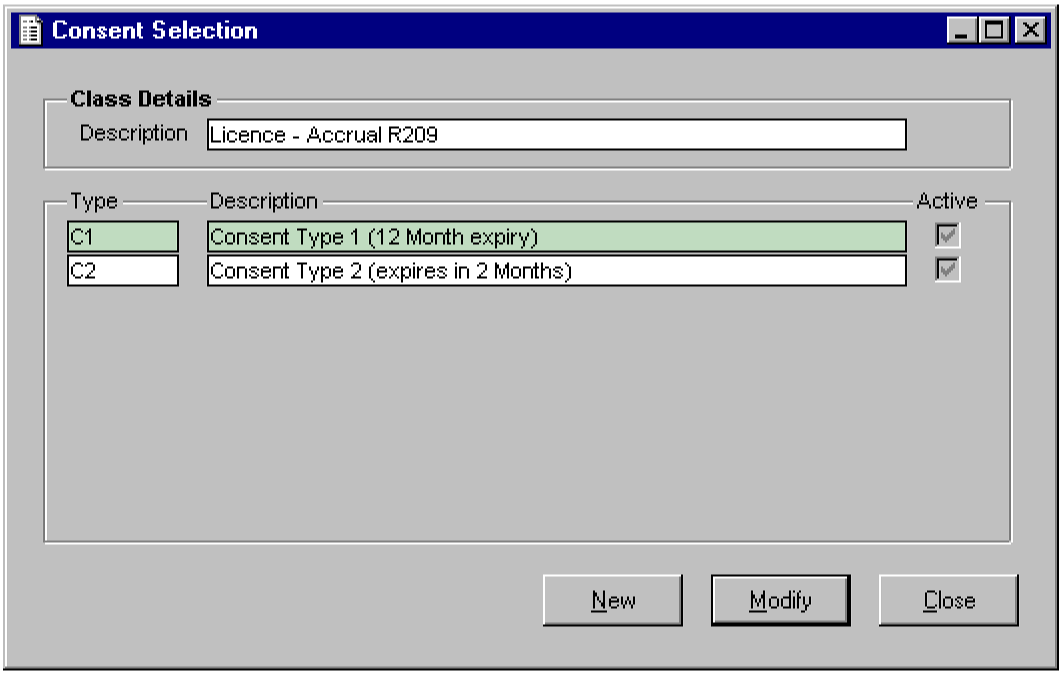
Class Details
This field contains the description of the Class of Licence in which you are currently working.
This field is display only and may not be maintained.

Type
Enter a Consent type (or part thereof) if your search is to be based on the consent type.
If this field is left blank then all Consent types will be included.

Description
Enter a Consent description (or part thereof) if your search is to be based on the consent description.
If this field is left blank then all Consent descriptions will be included.

Consent Selection Form

This form displays all Consent types that match the search criteria entered.
From this form you may select a Consent type to modify or alternatively create a new Consent type.



Consent Selection Form

Class Details
This field contains the description of the Class of Licence to which the displayed Consents types belong. This field is display only and may not be maintained.

Type
This field contains the type code of the consent record.
This field is display only and may not be maintained.

Description
This field contains the description of the consent record.
This field is display only and may not be maintained.

Active
This field shows the active status of the consent record.

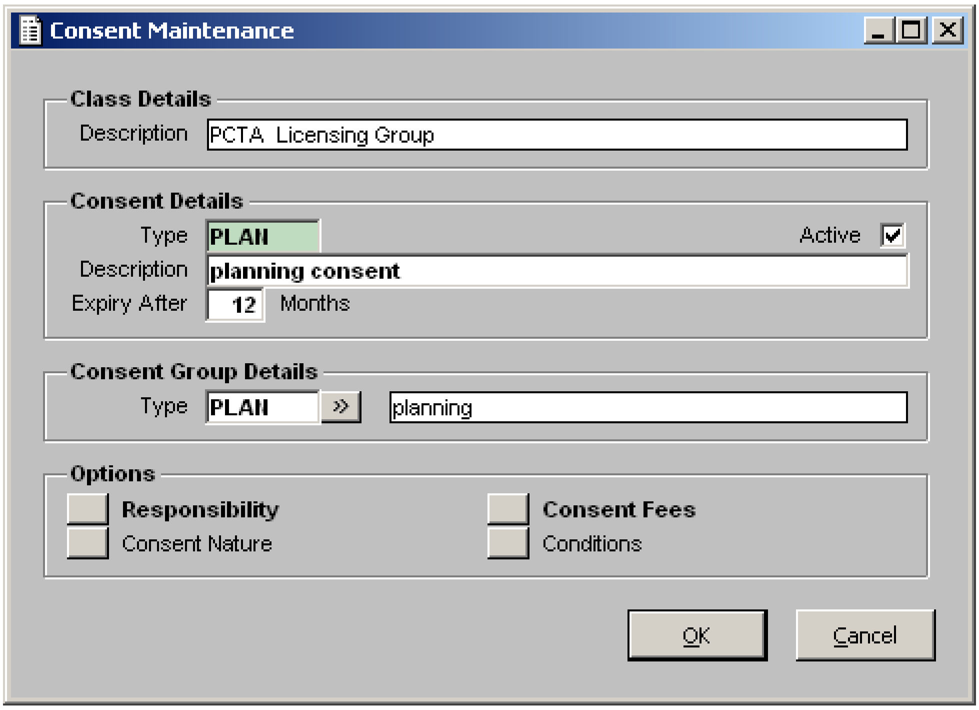
If this box is checked on then the consent record is active.
If this box is checked off then the consent record is not active.

This field is display only and may not be maintained.

Consent Maintenance Form

This form is used to enter or maintain a Consent. Additionally Consent Fees, Nature and Responsibilities can been assigned to the Consent.

NOTE: - Conditions are also able to be assigned to the Consent. When these Consents are used in Licensing Maintenance, in Licence Entry, Change Licence Type or inserting a new Fee, the assigned Condition will be loaded onto the Licence. The system will check for existing Standard Conditions and these Consent Conditions will only be loaded once if Standard but will always load if Non Standard. As the Conditions Option is a Secured Option it will only be available for use where the Council is authorised to the function.



Consent Maintenance Form

Class Details
This field contains the description of the Class of Licence to which you are assigning a Consent type.
This field is display only and may not be maintained.

Type
This field contains the code for the Consent record. Up to six alphanumeric characters may be entered.
This field is mandatory.

Description
This field contains the description for the Consent record.
This field is mandatory.

Active
If this box is checked on then the Consent type is available to the system.

If this box is checked off then the Consent type is no longer available to the system. Any existing Licensing with this Consent type will remain as entered. The Consent type will no longer be available for addition to Licensing.

Expiry After
This field contains the number of months after which the Consent record expires.

When an approval decision is placed against a Consent record the expiry date of the Consent will be updated by the approval date plus the value in this field.

Consent Group Type & Description
These fields contain the Consent Group and Description to which this Consent type is assigned.
This field is used for reporting purposes.
This field is optional.

Group Code & Description
These fields contain the Group Code and Description that have been assigned to this Consent type.
This field indicates the Responsible Group for the Consent. It is used for reporting purposes only.
This field is optional.

Responsibility Option
Pressing this button will display the Assign Responsibility Maintenance form which allows you to override the Responsible Officers by Area Codes.

If Area Codes are used and a Licence is lodged for that Area Code then the Responsible Officers assigned to the Consent may be overridden at that Area Codes level.
This feature is optional.

Consent Nature Option
Pressing this button will display the Consent Nature Maintenance form.
This feature is optional.

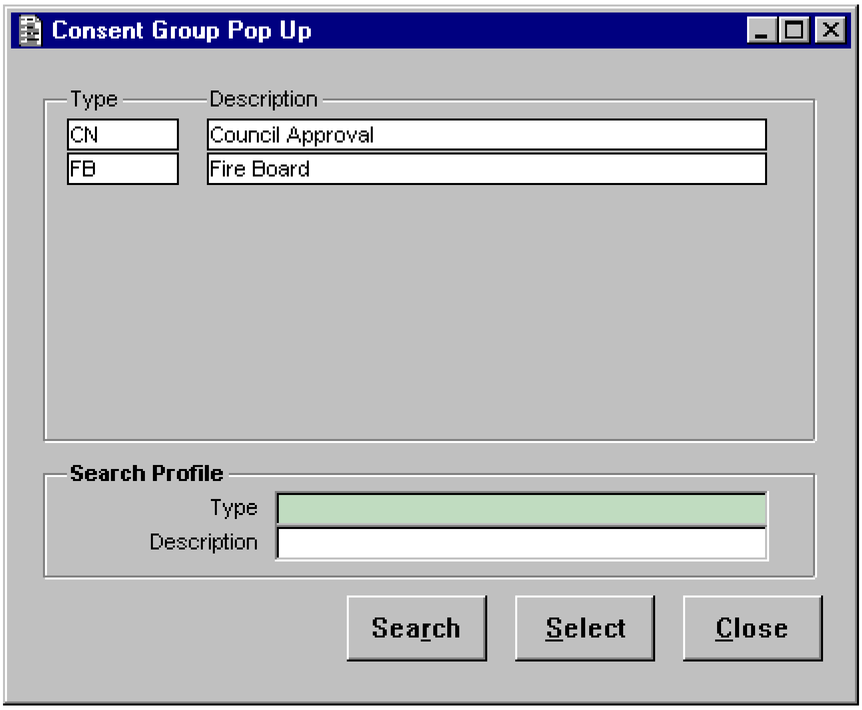
Consent Fees Option
Pressing this button will display the Consent Fee Maintenance form.

Conditions Option
Pressing this button will display the Condition Maintenance form.

NOTE: - When these Consents are used in Licensing Maintenance, in Licence Entry, Change Licence Type or inserting a new Fee, the assigned Condition will be loaded onto the Licence. The system will check for existing Standard Conditions and these Consent Conditions will only be loaded once if Standard but will always load if Non Standard. As the Conditions Option is a Secured Option it will only be available for use where the Council is authorised to the function.

Consent Group Pop Up Form

This form allows you to select the appropriate Consent Group to assign to a Consent type.
Only active Consent Groups are displayed.



Consent Group Pop Up Form

Type & Description
These fields display the available Consent Group types and their descriptions.
Only active Consent Groups will display in this list.

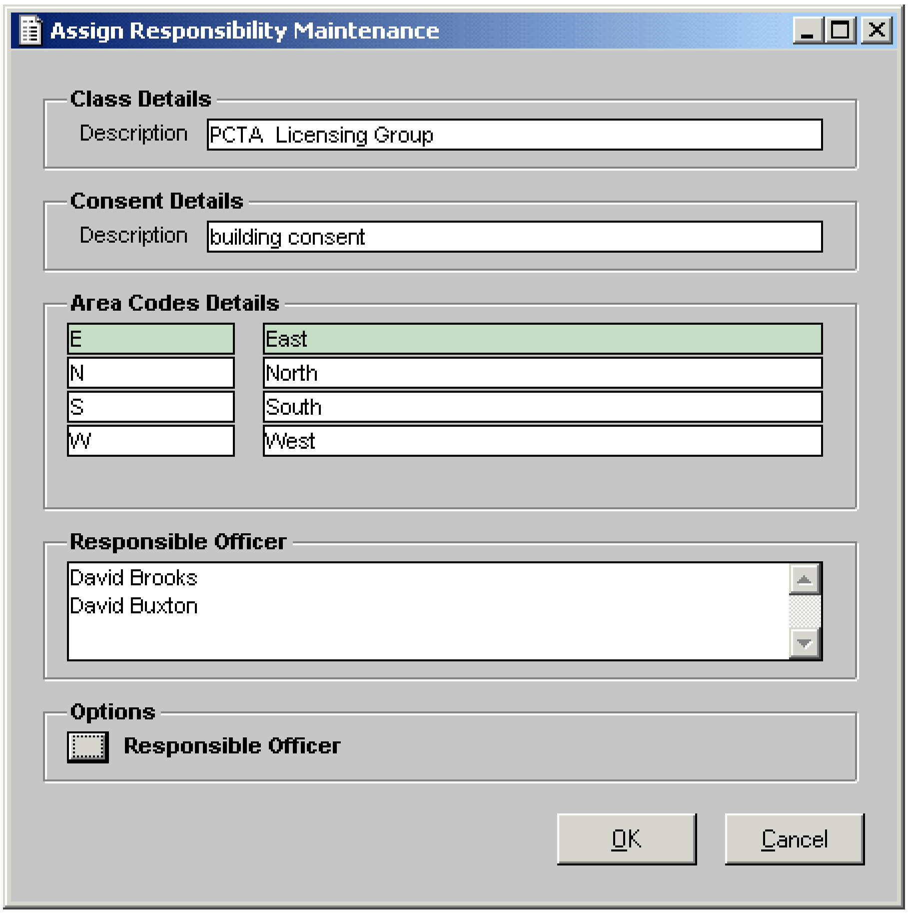
Search Profile - Type
Enter a Consent Group Type (or part thereof) on which to base your search. Use the Search button to initiate the search.
Wild card searching is available on this field.

Search Profile - Description
Enter a Description (or part thereof) on which to base your search. Use the Search button to initiate the search.
Wild card searching is available on this field.

Assign Responsibility Maintenance Form

This form allows you to override the Responsible Officers assigned to the Consent type at the Area Codes level.

If no overrides are entered then the Responsible Officers at the Consent type level remain in force.



Assign Responsibility Maintenance Form

Class Details - Description
This field contains the description of the Class of Licence in which you are working.
This field is display only and may not be maintained.

Consent Details - Description
This field contains the description of the Consent to which you are assigning Responsible Officer overrides.
This field is display only and may not be maintained.

Area Codes Details
This field contains the code and description of the Area Codes to which you may assign alternative Responsible Officers.

If this Area Code uses the Responsible Officers assigned at the Consent Type level then no action is required.
This field is display only and may not be maintained.

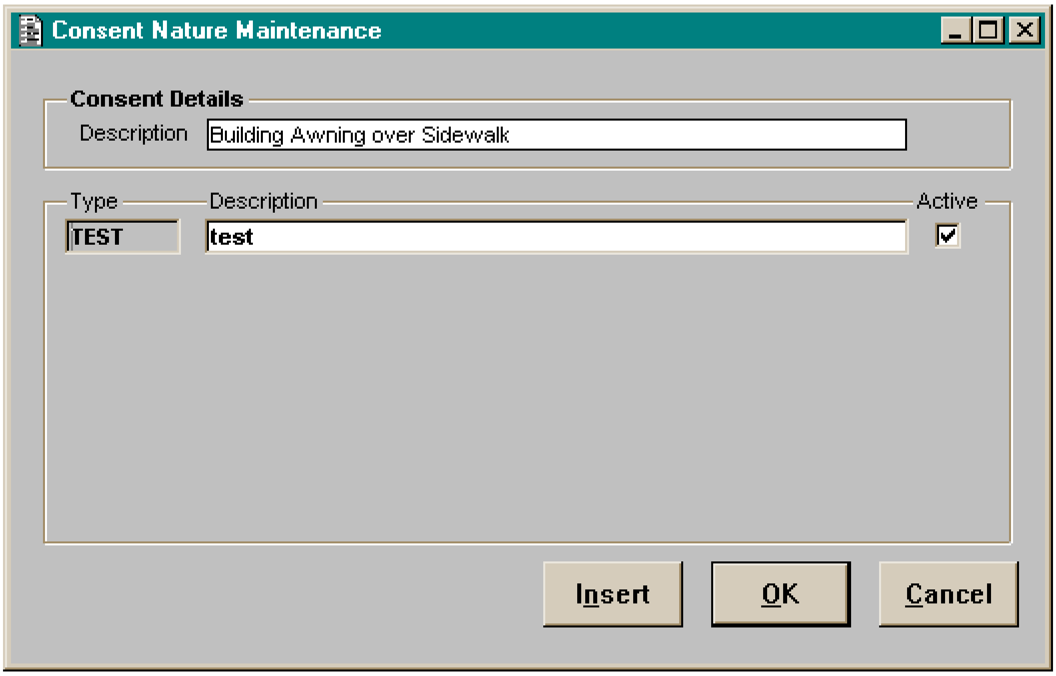
Responsible Officer
This field contains a List of Responsible Officers that had been assigned to the Area Code. As focus is placed on the various Area Codes so the information in this field is updated to display the appropriate Officers for the Area.

Options – Responsible Officer
The Responsible Officer Option can be selected to maintain the Responsible Officers for the Area currently in focus. Officers can be added or removed and the Primary Officer assigned.

Consent Nature Maintenance Form

This form allows you to create and maintain Consent Nature types.
When Consent records are attached to a Licence you may also attach Consent Nature records. Only Consent Nature records associated with the Consent will be available for selection.

Consent Nature is used for reporting purposes.
This function is optional.



Consent Nature Maintenance Form

Consent Description
This field contains the description of the Consent type to which you are assigning Nature types.
This field is display only and may not be maintained.

Type
This field contains the code for the Consent Nature record.
Up to six alphanumeric characters may be entered.
This field is mandatory.

Description
This field contains the description required for the Consent Nature record.
This field is mandatory.

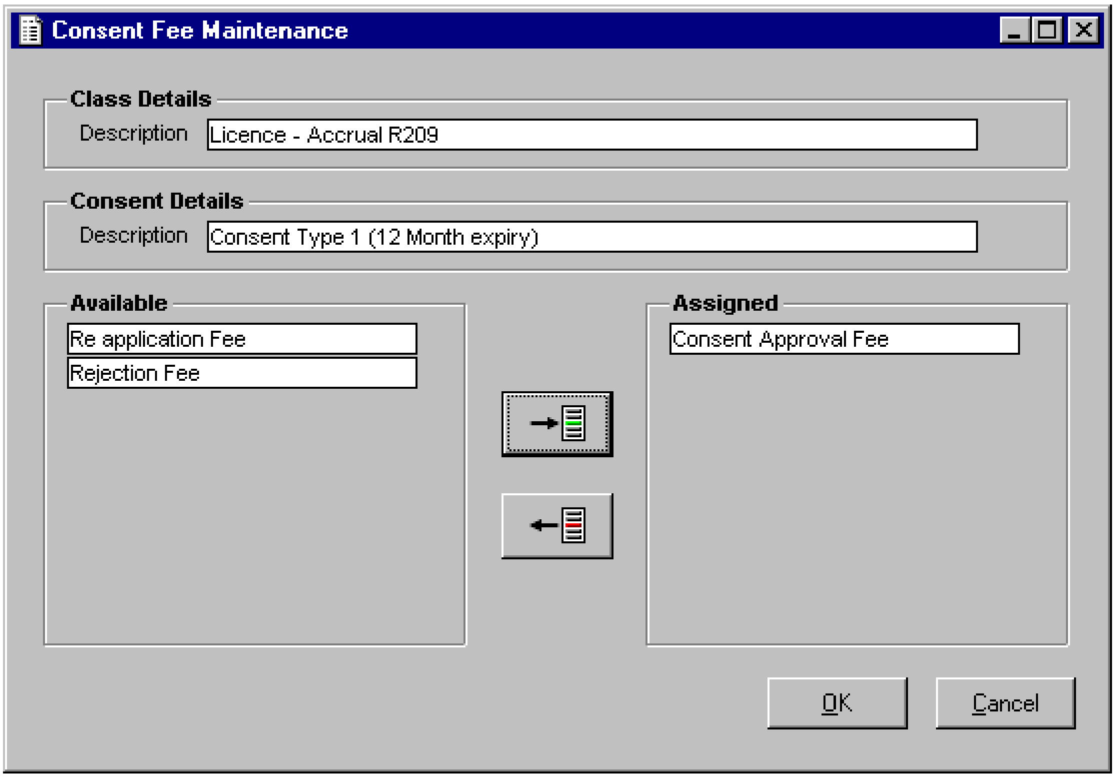
Active
If this box is checked on then the Consent Nature type is available to the system.

If this box is checked off then the Consent Nature type is no longer available to the system. Any existing Consents with this Consent Nature type will remain as entered. The Consent Nature type will no longer be available for addition to Consents.

Consent Fee Maintenance Form

If Fees are to be loaded when the Consent is placed on the Licence then the Fees need to be assigned on this form.

Only Fees that have been set up in the Consent Fees Option are shown and can be used.



Consent Fee Maintenance Form

Class Details - Description
The description of the Licence Class being maintained is displayed in this field.

Consent Details - Description
The description of the Consent being maintained for the Licence Class is displayed in this field.

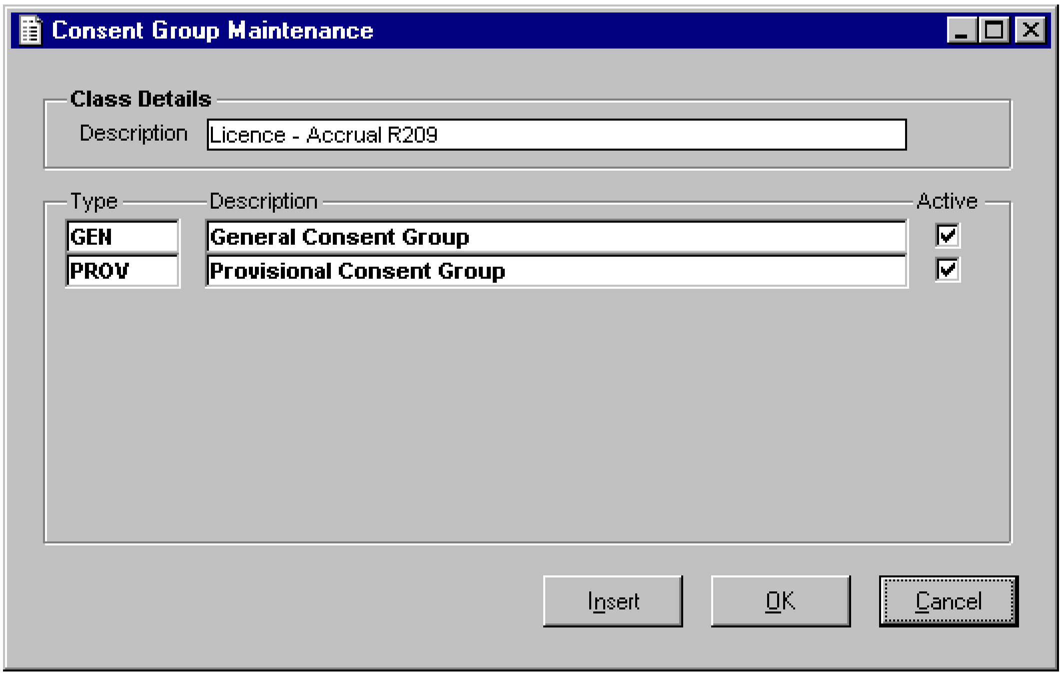
Available
A list of Available Consent Fees is displayed for the User to nominate which Fees can be automatically loaded when the Consent is added to the Licence.

Assigned
A list of the Assigned Consent Fees is displayed in the Assigned area.

Consent Groups

Consent Group Maintenance Form

This form allows for the creation and maintenance of Consent Groups.
Consent Group is used for reporting purposes only and is optional to the system.
Consent Group allows individual Consent Types to be allocated to a Consent Group. For example all Consent Types relating to a Building may be grouped together under a single Consent Group of Building.



Consent Group Maintenance Form

Class Details
This field contains the description of the Class of Application to which you are assigning Consent Groups. This field is display only and may not be maintained.

Type
This field contains the Consent Group code. Up to six alphanumeric characters may be entered.
This field is mandatory.

Description
This field contains the Consent Group description.
This field is mandatory.

Active
If this box is checked on then the Consent Group is available to the system.

If this box is checked off then the Consent Group is no longer available to the system. Any existing Consents assigned with this Consent Group will remain as entered. The Consent Group will no longer be available for addition to Consent Types.

Correspondence Received

Correspondence Received Form

The Correspondence Received Form is designed to allow the User to enter specific Codes for the various Types of information forwarded to the Council.

These may be things such as Email, Faxes, Letters, etc. Each Code can be entered as a 10 character alpha/numeric field and then a full description in the field next to it. An Active check box is provided to allow the User to make the particular Correspondence Active. If this box is checked on, then this particular Correspondence Type may be assigned to the Licence.

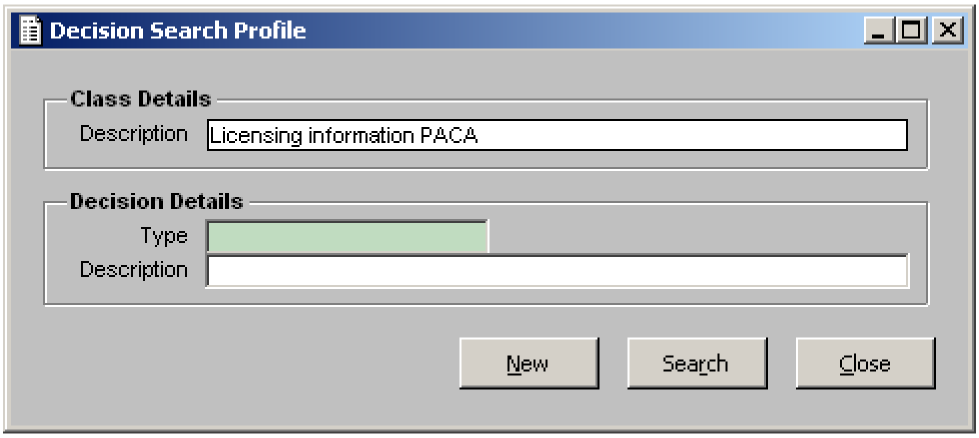
Decisions

The Decision Parameter allows you to nominate an unlimited number of Decision Types eg. Approved, Rejected, Interim Approval etc.

Decision Search Profile Form

On entry to the Decisions parameter option the first form that is displayed is the Decision Search Profile.

This form allows you to enter a search profile on which to base your search.
If no search criteria is entered, and the Search Button is pressed then all Decision parameters will be displayed.
You may also elect to create a new Decision type from this form by pressing the New Button.



Decision Search Profile Form

Class Details
This field contains the description of the Class of Licence in which you are working.

This field is display only and may not be maintained.

Type
Enter a Decision Type (or part thereof) if your search is to be based on a Decision Type.

Leaving this field blank will search over all Decision types.

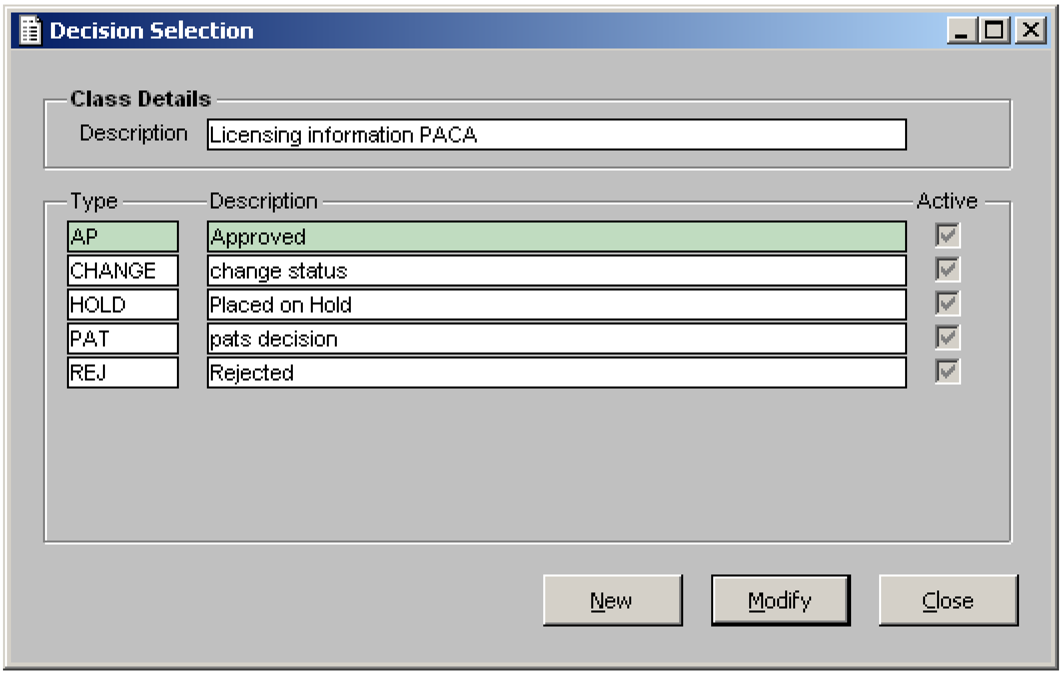
Description
Enter a Decision Description (or part thereof) if your search is to be based on a Decision Description.

Leaving this field blank will search over all Decision descriptions.

Decision Selection Form

This form presents a list of all Decision types that match your search criteria.

From this list you may select a Decision type on which to perform maintenance (Modify Button) or alternatively create a new Decision type (New Button).



Decision Selection Form

Class Details
This field contains the description of the Class of Licence to which you are assigning Decision types.

This field is display only and may not be maintained.

Type
This field contains the Decision Type code.

This field is display only and may not be maintained.

Description
This field contains the description of the Decision Type.

This field is display only and may not be maintained.

Active
This field displays the Active status of the Decision Type.

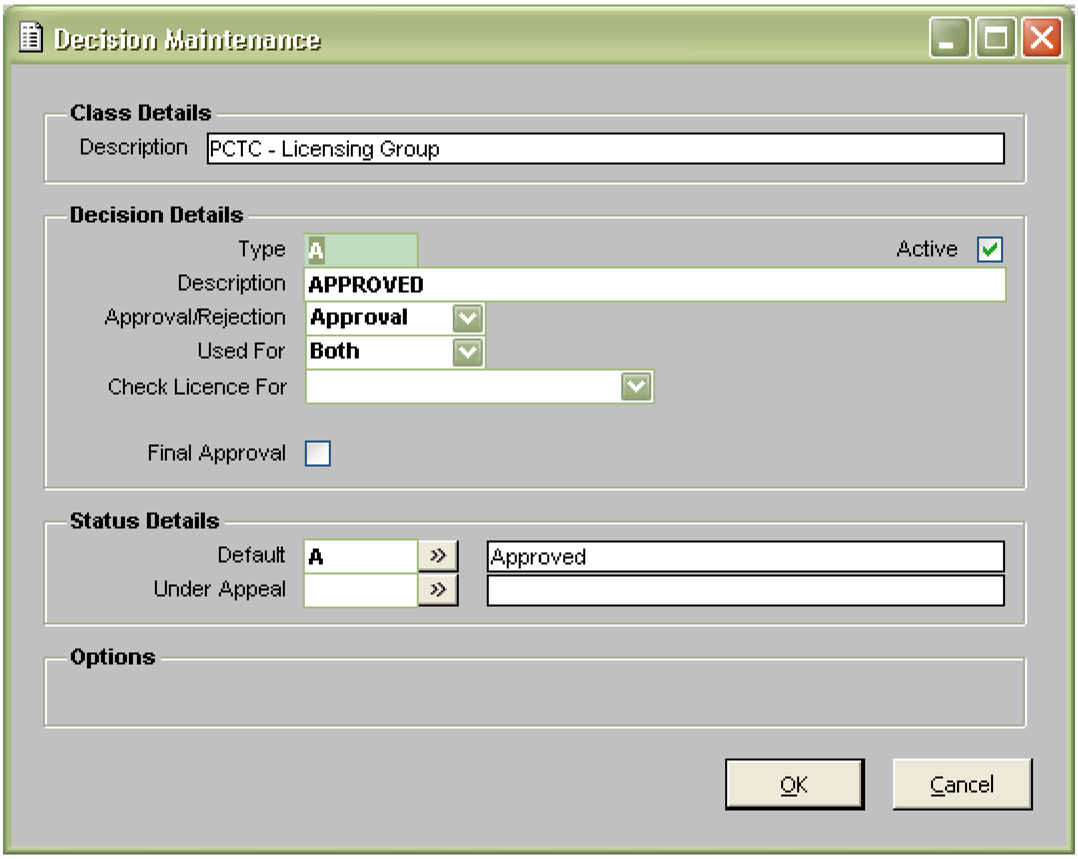
If the check box is ticked on then the Decision Type is active.

If the check box is not ticked on then the Decision Type is not active.

This field is display only and may not be maintained.

Decision Maintenance Form

This form is used to maintain a Decision Type record. Decisions within the Licensing module do not have the Include in ABS, BCC fields available. Additionally, the Recalculate Expire Date field is also not available for selection on this form.



Decision Maintenance Form

Class Details
This field contains the description of the Class of Licence to which you are assigning a Decision type.
This field is display only and may not be maintained.

Type
This field contains the Type Code for the Decision Type.
Up to six alphanumeric characters may be used.
This field is mandatory.

Active
If this box is checked on then the Decision type is available to the system.

If this box is checked off then the Decision type is no longer available to the system. Any existing Licensing with this Decision type will remain as entered. The Decision type will no longer be available for addition to Licensing.

Description
This field contains the description for the Decision Type.
This field is mandatory.

Approval/Rejection
This field determines whether this Decision Type is for an Approval or Rejection.
Three options are available from the drop down list.

- Approval
- Rejection
- None

If a Decision Type is “Approval” when the decision is applied to a Licence or a consent then expiry date calculation will automatically take place.
Decision Types may also be established that are neither for an official Approval or Rejection i.e. Interim Approval.
This field is mandatory.

Used For
This field determines whether this Decision Type may be applied at the Licence level, Consent level or both levels.

Three options are available from the drop down list.
- Licensing
- Consents
- Both

If “Licensing” is selected then this Decision Type will only be available via the Licence Decision maintenance form.
If “Consents” is selected then this Decision Type will only be available via the Consents Decision maintenance form.
If “Both” is selected then this Decision Type will be available via the Licence Decision and the Consent Decision maintenance forms.

This field is mandatory.

Check Licence For
The Check Licence For field can be used to force the checking of a Licence for Incomplete Workflow Tasks or Suspended Tasks before allowing this particular Decision to be added to a Licence. If no checking is required for the Decision to be added then the field can remain blank.

To force checking for Incomplete Tasks set the Check Licence For flag to Incomplete Tasks.

To force checking for Suspended Tasks set the Check Licence For flag to Suspended Task.

If this field is set when this Decision is added to a Licence with Incomplete/Suspended tasks an error message is display to the User after the Ok button is pressed notifying the User that the Decision can not be added.

NOTE: Decisions that have been set to check for 'incomplete' Tasks should not be used in a Workflow Action.

Final Approval
The Final Approval flag is only used for the Authorised Function of Bulk Responsible Officer Reassignment. Whilst this field is displayed its function is purely for use in determining the Final Approval Decision on a Licence and therefore determining if that Licence can then be Update via the Bulk Responsible Officer Reassignment. It is not used by any other process within Licensing.

Status Details - Default
This field contains the Licence status code that will be applied to a Licence when this Decision Type is applied to a Licence or Consent.

If the status code is not required to be updated then this field may be left blank.

If a status code is entered here then the Licence will automatically be updated with this code when the Decision Type is used.

Status Details – Under Appeal
This field contains the Licence ‘Under Appeal’ status code that will be applied to a Licence when this Decision Type is applied to a Licence and the ‘Under Appeal’ checkbox is ticked on.

If the status code is not required to be updated then this field may be left blank.

If a status code is entered here then the Licence will automatically be updated with this code when the Decision Type is used on the Licence and the Under Appeal checkbox is ticked on.

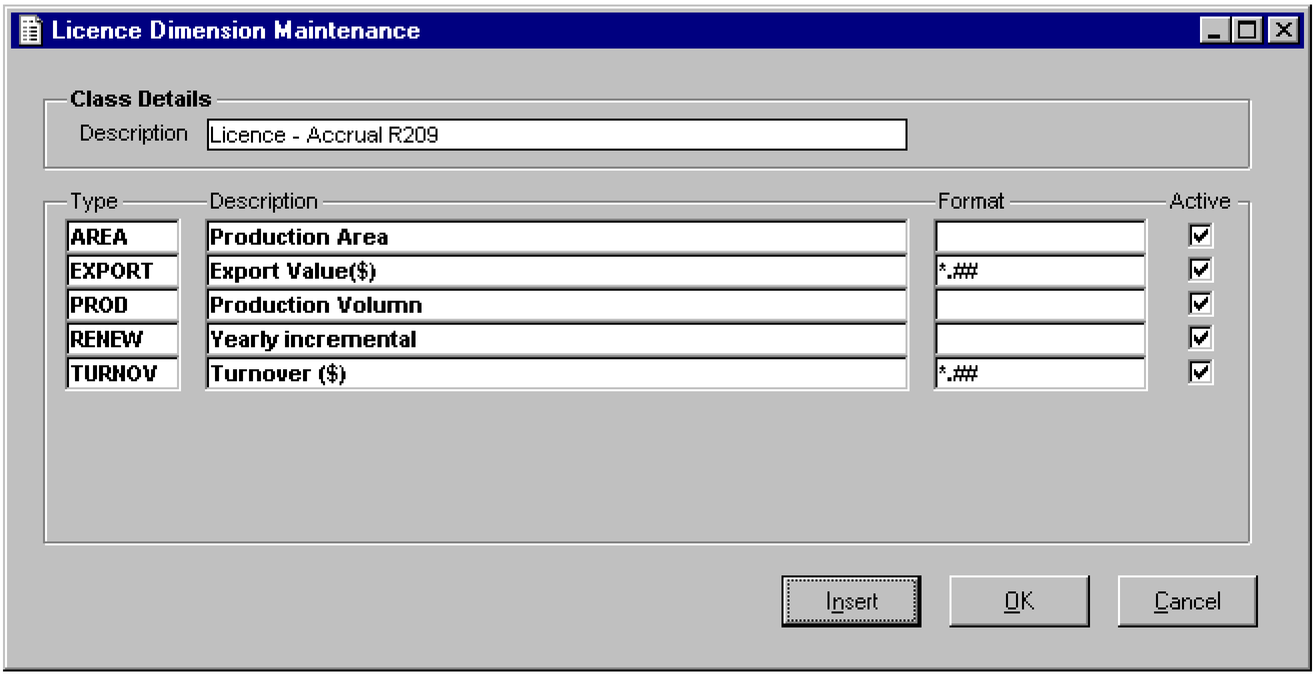
NOTE – The Under Appeal Status and its functionality is only applicable to Licence Decisions. This Status will not be used when the Under Appeal checkbox is checked on for a Consent Decision.

Dimension

Licence Dimension Maintenance Form

The Dimension Maintenance Form is used to add Dimensions to the system for use in the Maintenance of a Licence.

It also allows the entry of a Format to be defined so that when the Dimension is entered by the User the value keyed must match the criteria that has been defined within the Format Field for the Dimension Type.



Licence Dimension Maintenance Form

Class Details - Description
This field describes the Class that is current.

Type
This field is used to enter a Code that a Dimension can be recognised as in the Maintenance Form.

Description
This field is used to enter a fully detailed Description of the Dimension.

Format
This field allows the User to specify a particular format for a Dimension Type. This will then determine the way in which the Dimension to be displayed and entered. The characters Hash (#), Asterisk (*), and Decimal Point (.) are used in the formatting. In conjunction with the Hash characters, Brackets can be used. The use of Brackets allows the format to be defined so that if numerics are entered they can be upto a certain value. Refer to the Table following for example of the characters and how they can be applied to the Format field.

Hash	#	**Specifies a digit must be entered for every # in the format**
Asterisk	*	**Any number of digits may be entered**
Decimal Point	.	**A decimal point must be entered as part of the number entered**

Brackets	**( )**	**Signifies that if a digit is entered then the number of digits that can be entered. The entry for the field can therefore be optional instead of mandatory.**

Examples of this are:

Format ##	Valid Input/Output	12 but NOT 1
Format ###	Valid Input/Output	123 but NOT 12
Format ##.#	Valid Input/Output	12.1 but NOT 12.12
Format *.##	Valid Input/Output	3233.99, or 1.50 but NOT 3233.1
Format (#)(#)(#)	Valid Input/Output	1, or 12, or 123 but NOT 1234
Format *.(#)(#)	Valid Input/Output	1. or 123.1 or 1234.55 but NOT 1234.123

If the value entered during Dimension Maintenance does not match the format defined at this level then an error message is displayed. The error message displays the correct format for the specified Dimension Type.

Active

If this box is checked, then the Dimension is Active and can be selected in the Maintenance Forms. If the box is not checked then the Dimension cannot be selected during Maintenance of a Licence.

Food Safety Parameters

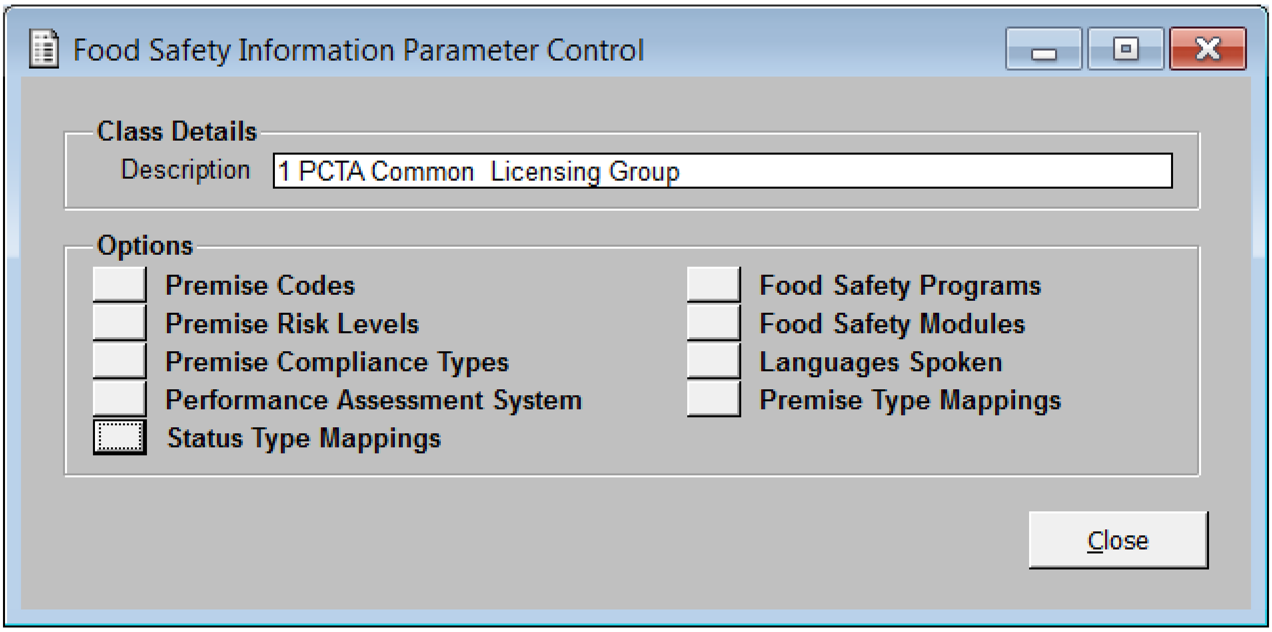
This parameter is used to establish various options that may be applied to a Licence Type to enter and maintain details of Food Safety Programs and Tobacco Retailers Information as required by the Department of Human Services in Victoria. The function will allow Users, at any given time, to produce the required 'XML' files to be forwarded to the Victorian Food Information Network.

Additionally this parameter is also used by South Australian sites to record SA Food Safety Information.

This is an Authorised Function.

Food Safety Information Parameter Control Form

The Food Safety Information Parameter Control Form is used as the starting point for creating codes and their descriptions for use within the Food Safety Maintenance form within Licensing.



Food Safety Information Parameter Control Form

Class Details – Description
This field displays the Class Description.

Options – Premise Codes
This button when selected details the User out to the Premise Codes Maintenance Form. This form is detailed further in this document.

Options – Food Safety Programs
This button when selected details the User out to the Food Safety Programs Maintenance Form. This form is detailed further in this document.

Options – Premise Risks Levels
This button when selected details the User out to the Premise Risks Levels Maintenance Form. This form is detailed further in this document.

Options – Food Safety Modules
This button when selected details the User out to the Food Safety Modules Maintenance Form. This form is detailed further in this document.

Options – Premise Compliance Types

This button when selected details the User out to the Premise Compliance Types Maintenance Form. This form is detailed further in this document.

Options – Languages Spoken
This button when selected details the User out to the Language Maintenance Form.
This form is detailed further in this document.

Optons – Performance Assessment System
This button will take the user to the parameters to enable the setting up of the Performance Assessment function.

Options – Premise Type Mappings
The Premise Type Purpose Code Mapping Maintenance form enables Council to map existing Purpose Code records with Department of Health Premise Type records.

Class Details – Description

This field displays the description of the Class chosen.

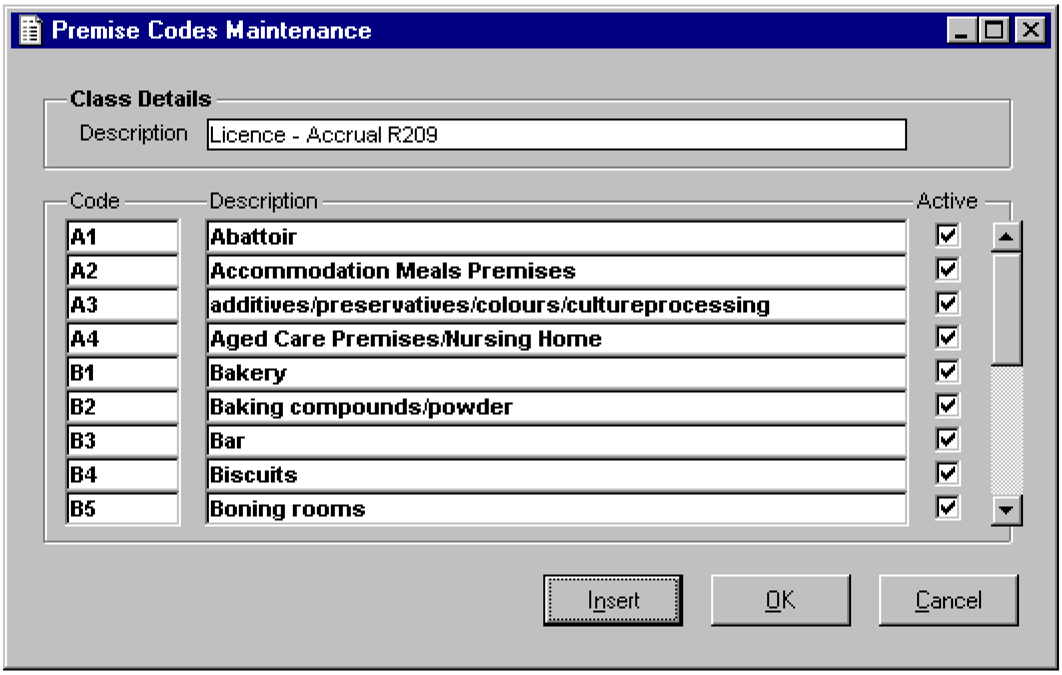
Premise Codes Maintenance Form

The value of the Premises Type Code attribute in the Premises Type element in the Core Business Data Upload file can be one of the following values listed below.

NOTE: These are for the VIC DHS and may not be applicable to other States.

Value	***Meaning***	***Value***	***Meaning***
A1	Abattoir	I1	Ice confection
A2	Accommodation Meals Premises	I2	Ice cream
A3	Additives/preservatives/colours/culture/processing aids	I3	Ice Creamery
A4	Aged Care premises/Nursing Home	I4	Infant food/formula
B1	Bakery	K1	Kiosk
B2	Baking compounds/powder	L1	Liquor/alcoholic beverages
B3	Bar	L2	Liquor Shop
B4	Biscuits	M1	Margarine
B5	Boning rooms	M2	Market Stall
B6	Bottle water/ice	M3	Meals on Wheels Premises
B7	Bread	M4	Meat
B8	Brewery	M5	Meat/vegetable pies
B9	Butcher	M6	Mobile Food Operator
C1	Cakes/desserts	N1	Nuts and nut products
C2	Canteen	O1	Oils/fats
C3	Caterer/In transit caterer	P1	Pastry
C4	Cereals/flour	P2	Poultry
C5	Child Care Premises	P3	Poultry shop
C6	Chocolate & cocoa products	P4	Pre-Packaged Food premises
C7	Club	P5	Prepared/packaged meals
C8	Coffee and Cake Premises	P6	Prison/Military Premises
C9	Condiments	R1	Restaurant/Café/Hotel
C10	Confectionery	S1	Salad
C11	Convenience Shop	S2	Sauces/pickles/vinegar
C12	Cordial, syrups and toppings	S3	School camps/camps
D1	Dairy	S4	Seafood
D2	Delicatessen	S5	Seafood Premises
D3	Dessert mixes (dry)	S6	Snack foods

D4	Distributor/Importer
E1	Egg and egg products
F1	Farm – Gate Sales
F2	Fruit & Vegetable Shop
F3	Fruit/Vegetables/Legumes
F4	Fruit juices
G1	Gelatine/jelly products
H1	Health Food Shop
H2	Home Delivery Food Business
H3	Hospital Kitchen
S7	Soft drinks
S8	Soya products
S9	Spices
S10	Sugar, Honey and related products
S11	Supermarket
T1	Take Away Food
T2	Tea/coffee
T3	Temporary Premises
W1	Winery



Premise Codes Maintenance Form

Class Details – Description
This field displays the Class Description.

Code
This field displays the Premise Code.

Description
This field displays the Premise Code Description

Active
If this field is checked on, then the Premise Code may be used. If unchecked it is classed as Inactive and therefore cannot be selected to add to a Licence.

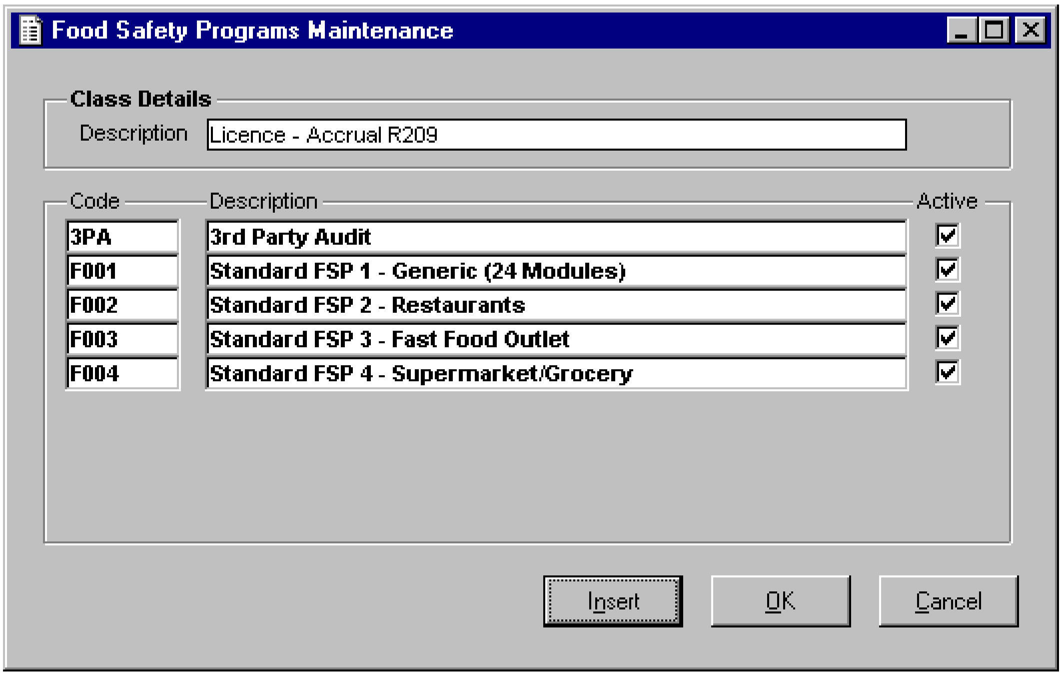
Food Safety Programs Maintenance Form

The value of the Food Safety Programs Code attribute in the Premises Compliance Upload file can be one of the following values listed below.

NOTE: These are for the VIC DHS and may not be applicable to other States.

Value	Meaning
3PA	3rd Party Audit
F001	Standard FSP 1 – Generic (24 Modules)
F002	Standard FSP 2 – Restaurants

F003	Standard FSP 3 – Fast Food Outlet
F004	Standard FSP 4 – Supermarket/Grocery



Food Safety Programs Maintenance Form

Class Details – Description
This field displays the Class Description.

Code
This field displays the Food Safety Program Code.

Description
This field displays the Food Safety Program Code Description.

Active
If this field is checked on, then the Food Safety Programs Code may be used. If unchecked it is classed as Inactive and therefore cannot be selected to add to a Licence.

Premise Risk Levels Maintenance Form

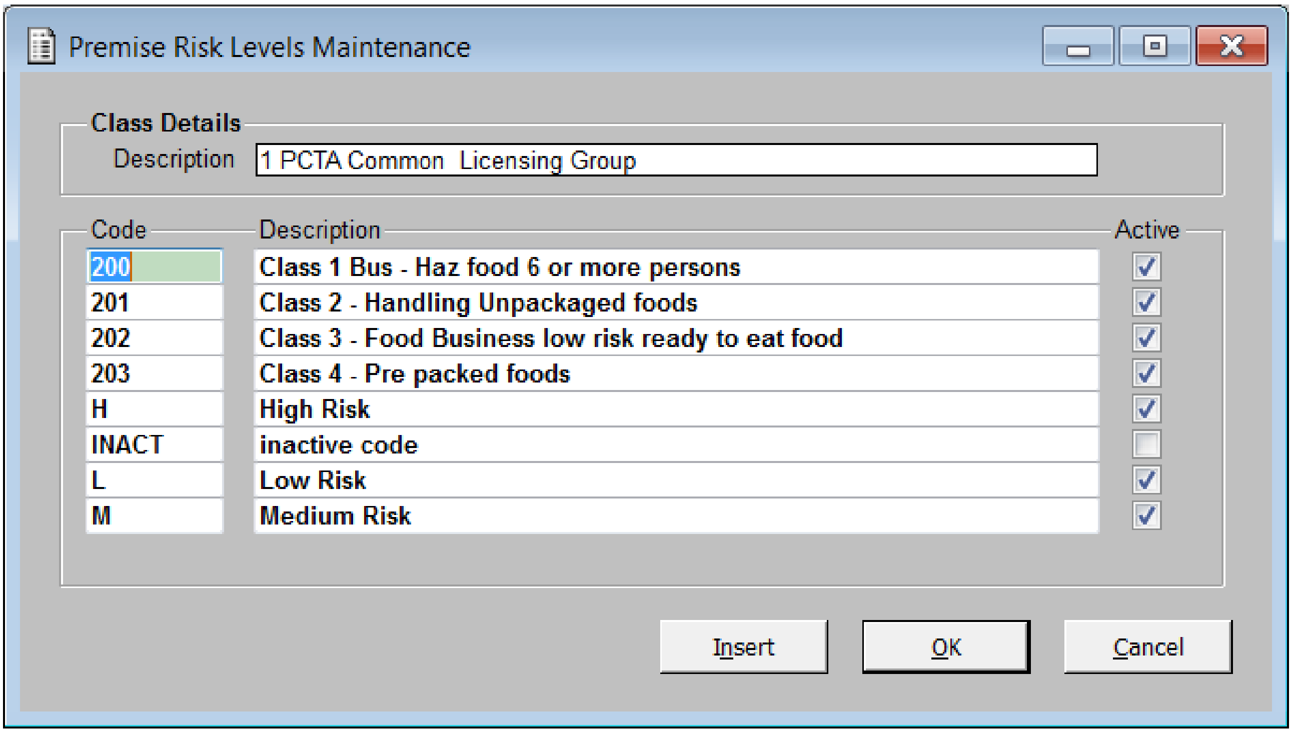
The value of the Premises Risk Level Code attribute in the Core Business Data Upload file can be one of the following values listed below.

Value	Meaning
L	Low Risk
M	Medium Risk
H	High Risk

NOTE: The following codes 200, 201, 202, & 203 are for the VIC DHS and may not be applicable to other States.

The DoH currently has 4 Premise Risk Classifications. These must be added to the current Food Safety Information parameters – Premise Risk Levels and then in turn these need to be added to each Licence Record within the Food Safety Maintenance forms.
We believe some sites set these Risk Levels via a Development Categories, or via the Licence Type which these still can be for internal purposes and fee calculations etc, but the Batch Process for extractions

purposes will look to the field on the FSI Maintenance form. It will check to see if there is an entry in the Food Safety Program field.
One of the Business rules from DoH states that where a Premise has a Risk level of 202 or 203 then a Food Safety Program is not mandatory but where the Risk level is a 200 or 201 and there is nothing in the Food Safety Program field an exception will be reported.
Infor **suggests** this rule be handled via a workflow question – e.g. Is this Licence a Class 1 or Class 2 Classification – if the answer is Yes then check that a Food Safety Program has been added to the FSI Maintenance form.



Premise Risk Levels Maintenance Form

Class Details – Description
This field displays the Class Description.

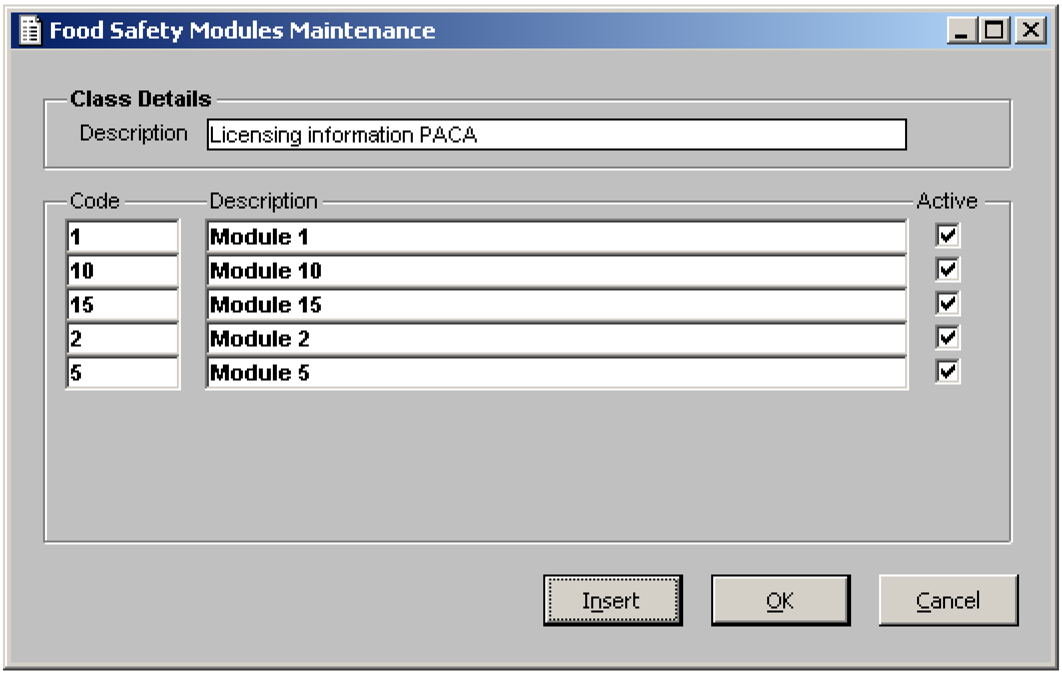
Code
This field displays the Code for the Premise Risk Levels.

Description
This field displays the description for the Premise Risk Levels.

Active
If this field is checked on, then the Premise Risk Levels Code may be used. If unchecked it is classed as Inactive and therefore cannot be selected to add to a Licence.

Food Safety Modules Maintenance Form

The Food Safety Modules Maintenance Form allows for the entry of the Module Code and its associated Description.



Food Safety Modules Maintenance Form

Class Details – Description
This field displays the Class Description.

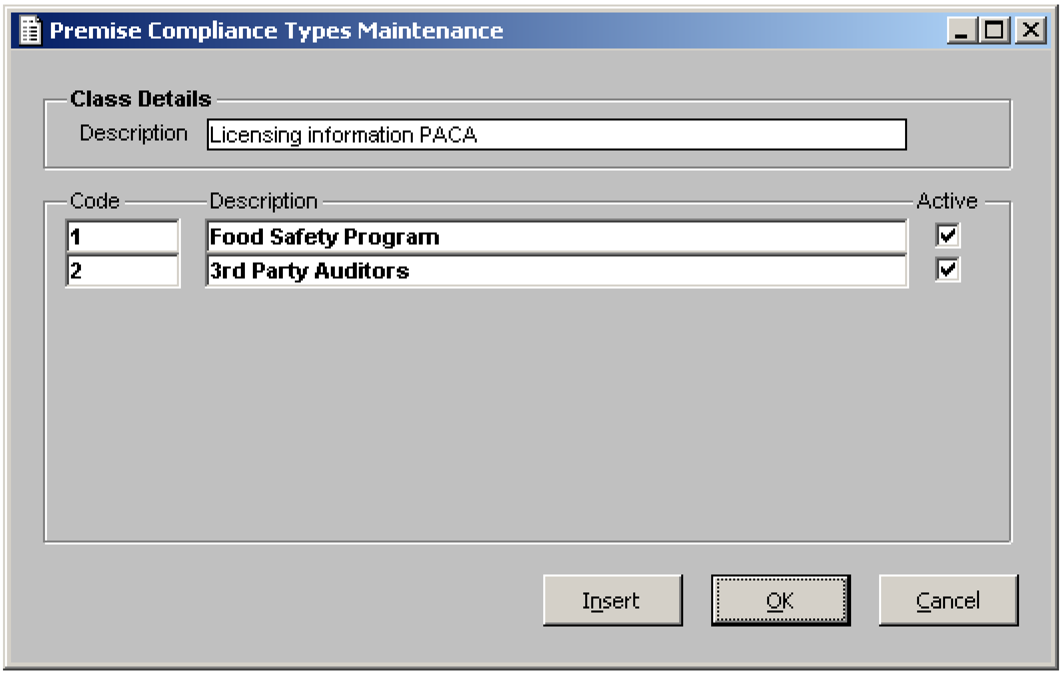
Code
This field displays the Code for the Food Safety Module.

Description
This field displays the description for the Food Safety Module.

Active
If this field is checked on, then the Food Safety Module Code may be used. If unchecked it is classed as Inactive and therefore cannot be selected to add to a Licence.

Premise Compliance Type Maintenance Form

Premise Compliance Type Maintenance Form allows the entry of Premise Compliance Type Codes and their associated Description.



Premise Compliance Types Maintenance Form

Class Details – Description
This field displays the Class Description.

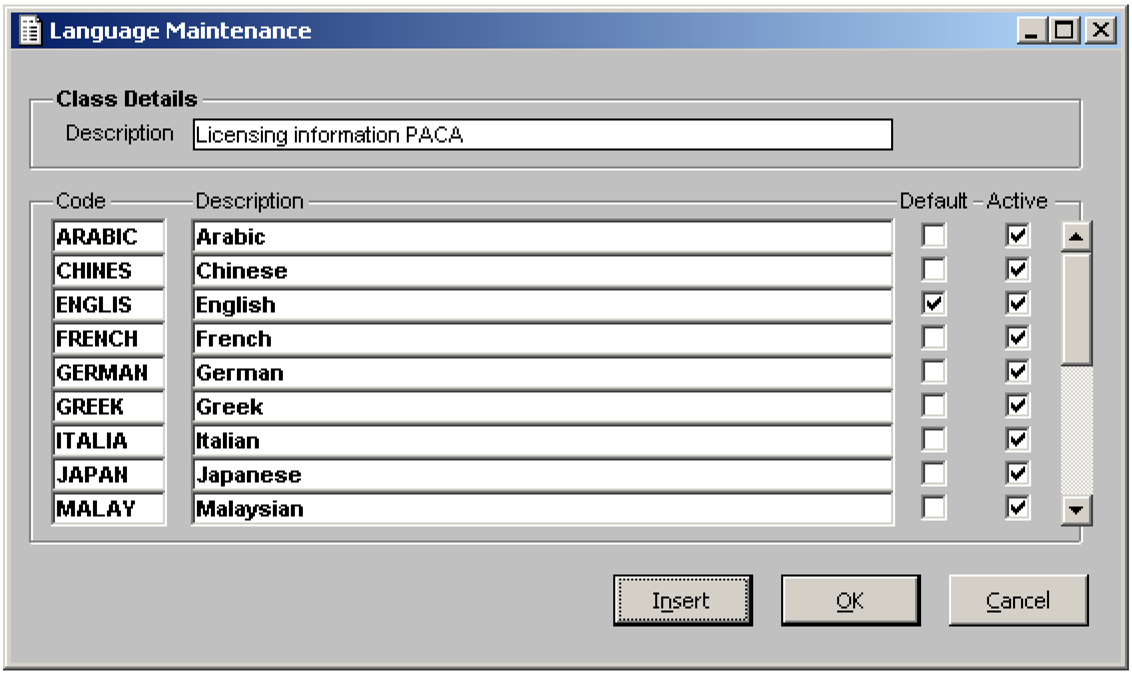
Code
This field displays the Code for the Premise Compliance Type Codes.

Description
This field displays the description for the Premise Compliance Types.

Active
If this field is checked on, then the Premise Compliance Type Code may be used. If unchecked it is classed as Inactive and therefore cannot be selected to add to a Licence.

Language Maintenance Form

Language Maintenance Form allows for the entry of Language Codes and their Descriptions. Additionally one Language Code can be defined as the Default Language to be used during Food Safety Maintenance on the Licence.



Language Maintenance Form

Class Details – Description
This field displays the Class Description.

Code
This field displays the Code for the Language.

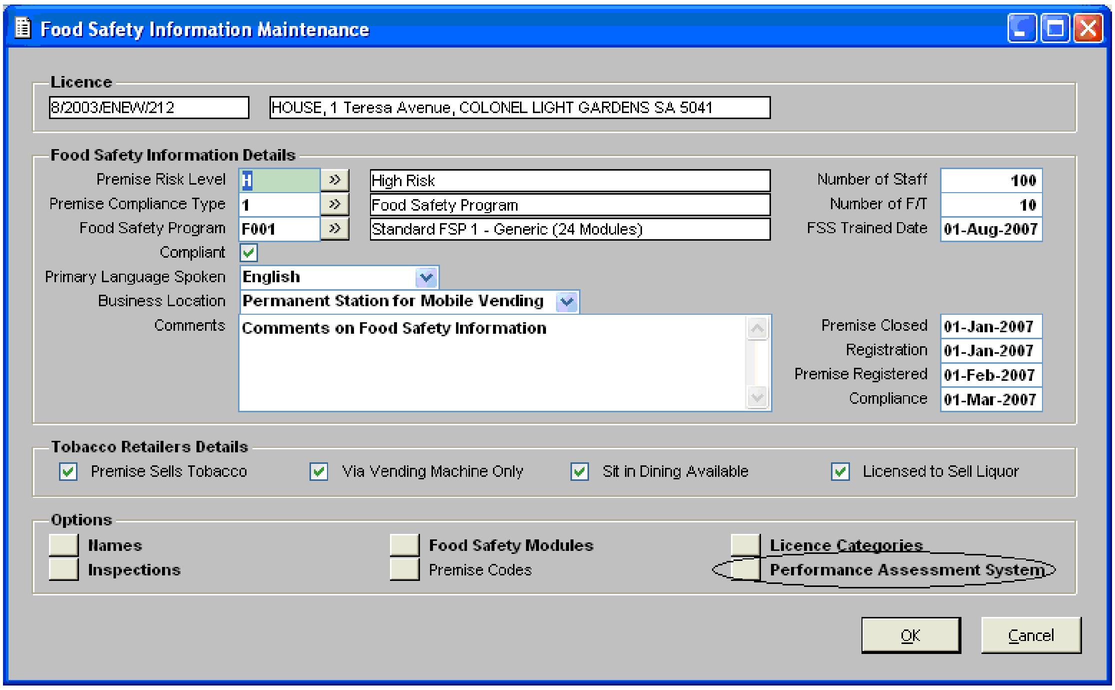
Description
This field displays the description for the Language.

Default
The Default field is used to nominate the Language that will default in at the time of Food Safety Maintenance being performed on the Licence. This can be changed on the Licence. One Language must be nominated as the Default.

Active
If this field is checked on, then the Language Code may be used. If unchecked it is classed as Inactive and therefore cannot be selected to add to a Licence.

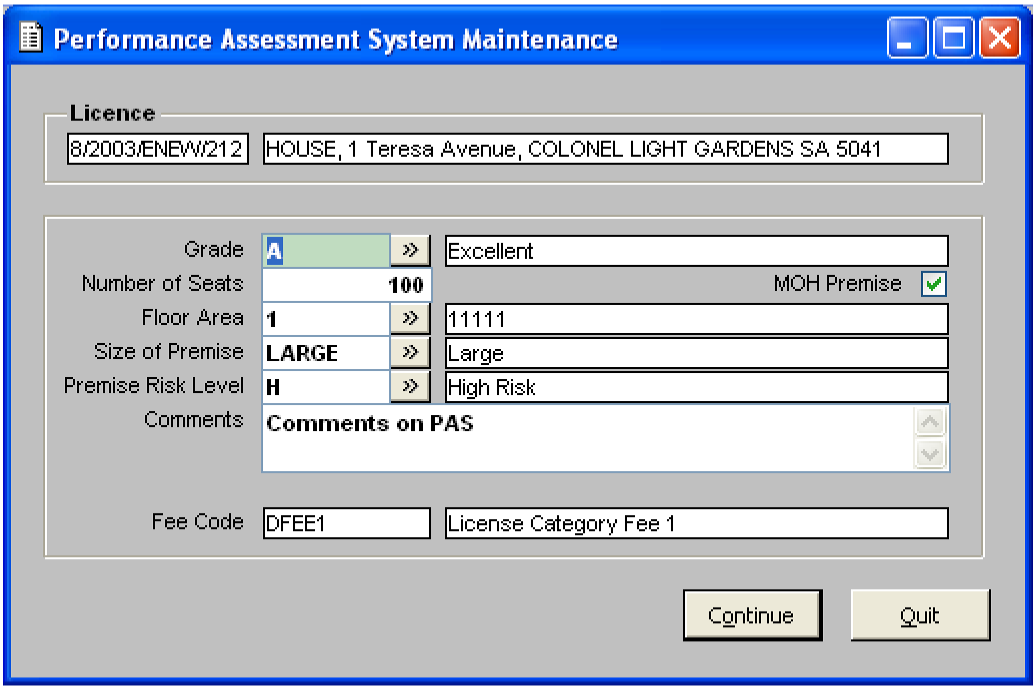
PAS Parameter Maintenance

This form enables the parameter settings to be created / amended for the Performance Assessment System. The Food Safety Information Maintenance form below contains another button called 'Performance Assessment System'. This button would open a PAS maintenance form that contains the latest details about the license.



PAS Maintenance Form

The Performance Assessment Maintenance form displays the following fields of Information:



- Existing Licence Type and Number – non editable field captured from Licence itself
- Grade – This field is the latest grade, defaulted with the Inspection Result from the “Final” inspection.
- MOH Premise – A Checkbox denotes that it is a Ministry of Health Premise.
- Number of Seats – 3 character numeric field
- Floor area – drop down select box with values set up in Floor Area Parameters.
- Size of Premise – drop down select box with values set up in Size of Premise Parameters
- Premise Risk Level – using the existing Food Safety Parameter Premise Risk Levels. Allow selection from the actual parameters via popup and once selected on this form, the relevant value is also updated to the Risk Level within the Food Safety Maintenance form.
- Comments – free format text box

Fee Code is retrieved from the PAS Renewal Fees Parameters.

Once the OK button is selected on the PAS Maintenance screen, all information on the form will become non editable i.e. Enquiry Mode only, unless User has Authorisation to “Change PAS”.

A new Extract “PAS” has been created with Extract fields of:
“Licence_Number”,
“MOH_Premise”,
“Number_of_Seats”,
“Floor_Area”,
“Size_of_Premise”,
“Premise_Risk_Level”,
“Grade”,
“Fee_Code”,
“Fee_Amount” and
“Comments”.
They will have values according to those values in the PAS Maintenance Form.

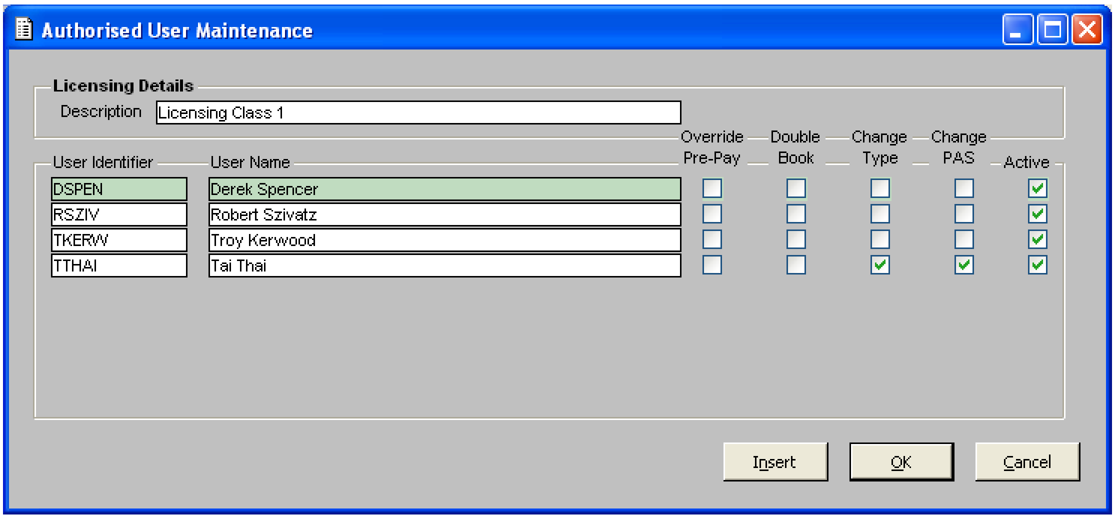
The “Licensing_Facts” of the Microsoft SQL Server Infomart have included new fields related to the PAS. They are:
PAS_Grade defined as Char(50),
PAS_Seats defined as Integer;
PAS_MOH defines as Char(3),
PAS_Floor_Area defined as Char(50),
PAS_Size_Premise defined as Char(50),
PAS_Risk_Level defined as Char(50),
PAS_Fee_Code defined as Char(50),
PAS_Fee_Amount defined as Integer;
PAS_Comments defined as Char(200).

The new “Create_SP_Licensing_25.sql” script has been created for Oracle Infomart to populate new fields related to the PAS. They are:
PAS_Grade defined as Char(50),
PAS_Seats defined as Integer;
PAS_MOH defines as Char(3),
PAS_Floor_Area defined as Char(50),
PAS_Size_Premise defined as Char(50),
PAS_Risk_Level defined as Char(50),
PAS_Fee_Code defined as Char(50),
PAS_Fee_Amount defined as Integer;
PAS_Comments defined as Char(200).

Parameter Set-Up

Inspection – Authorised User Maintenance

In order to allow certain users the ability to maintain any details on the PAS form, an Authority Option will be provided on the Inspection – Authorised User Maintenance. The form below contains another button called “Change PAS”.



Where the site wishes to allow maintenance of the PAS Maintenance form, then the users name should have the “Change PAS” field set ON.

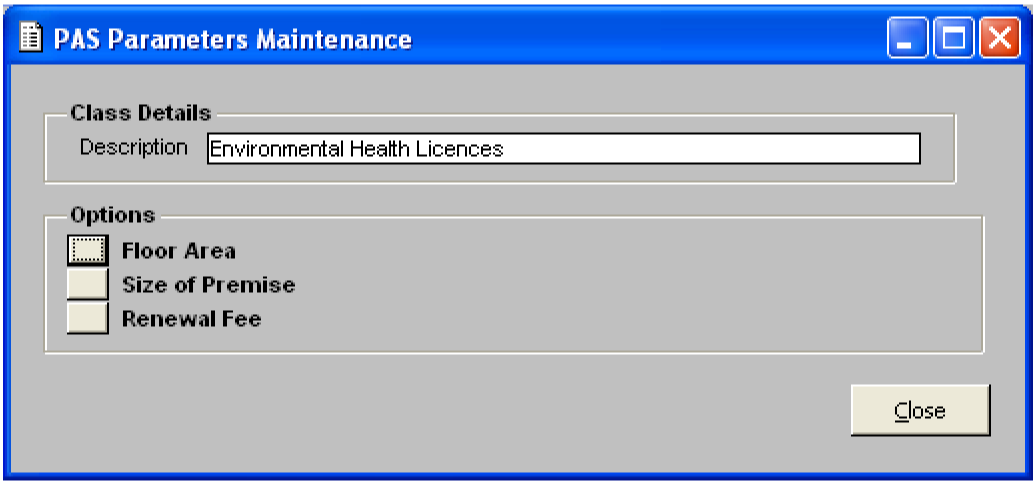
Where the “Change PAS” field is not checked for the user, then they will not be able to maintain the PAS Maintenance form once original information is added and the OK button selected.

This field is also using to control the Result field of the “Final Inspection”.

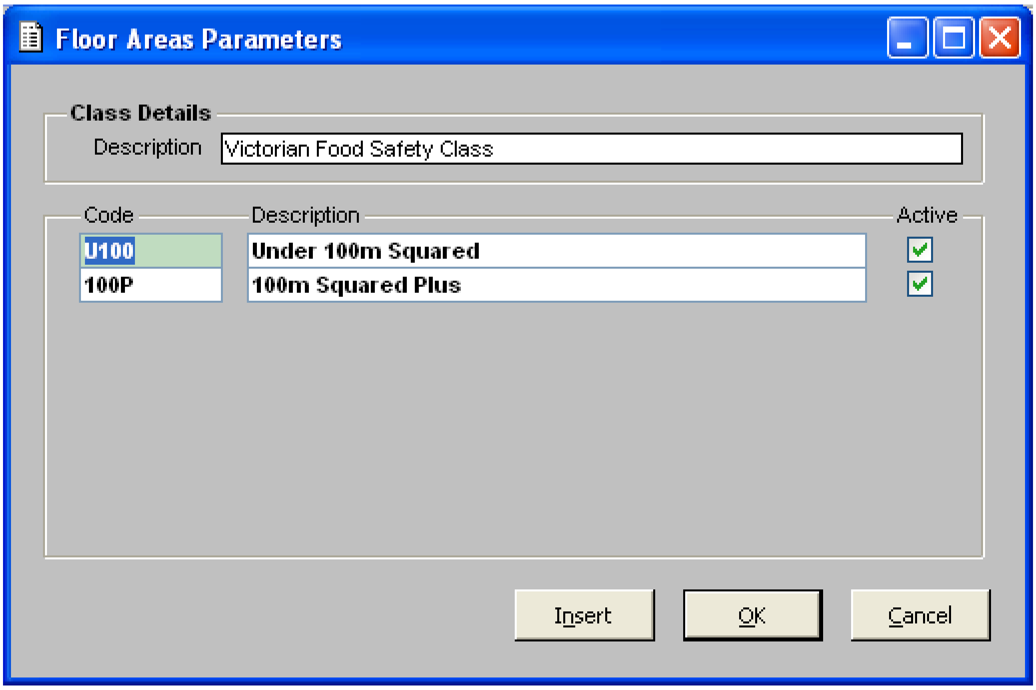
Food Safety Parameters

Within the Food Safety Parameter in Licence Parameter Maintenance the following options are available to use in addition to specific requirements that Auckland City already have and would suit the information displayed on the Food Premise Licence Data screen in the WorkSmart module.

The Performance Assessment System Parameters are required to have:

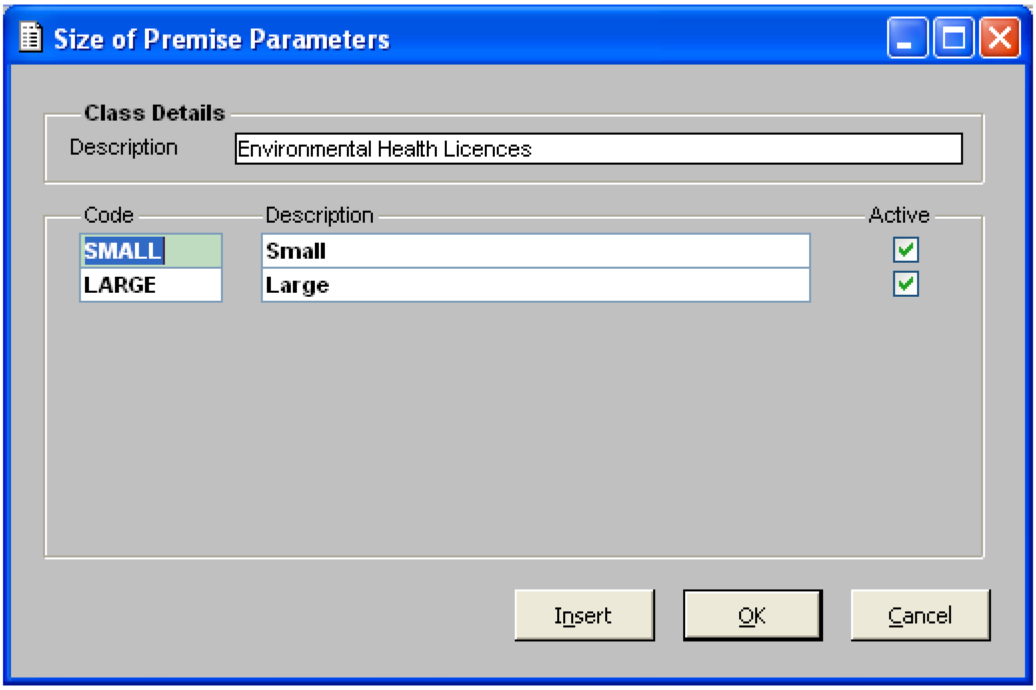


Floor Area



Codes and Descriptions of Floor Area are set up and can be used to specify for particular Licensing in PAS.

Size Of Premise

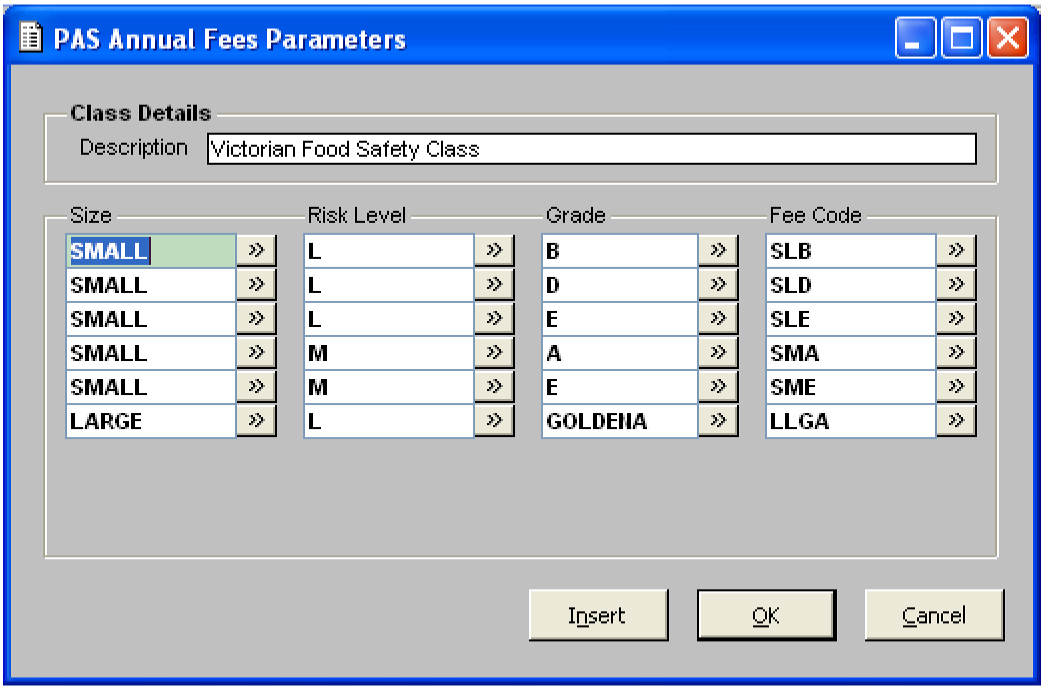


Codes and Descriptions of Size of Premise are set up and can be used to specify for particular Licensing in PAS.

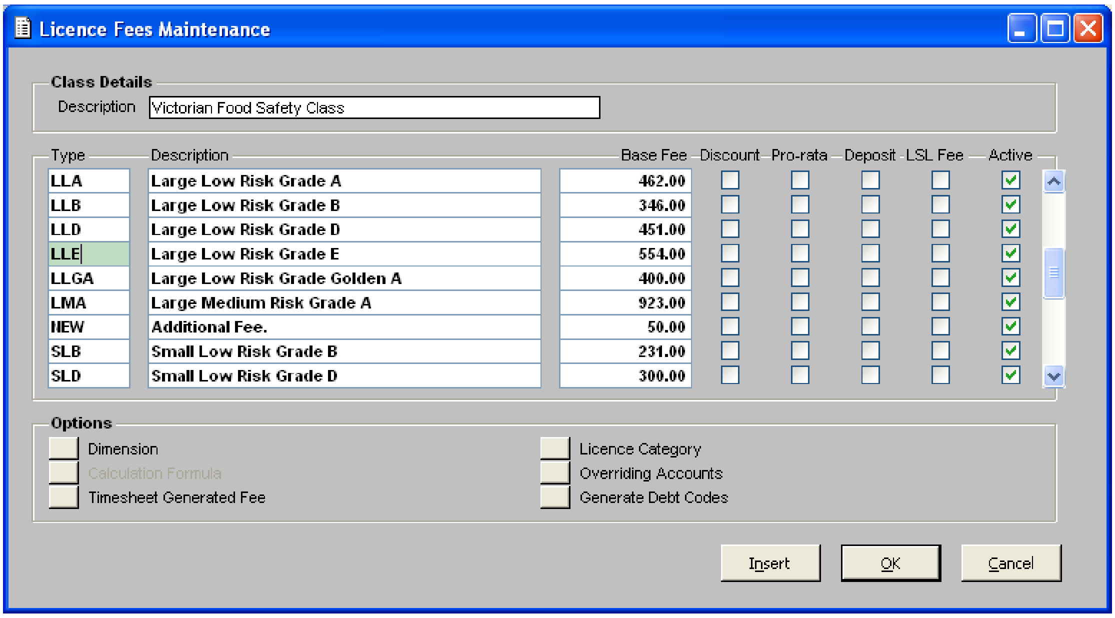
Renewal Fees

Renewal Fees for PAS are set up in this PAS Renewal Fees Parameters and will be used in the PAS Maintenance for each Licensing.

The calculation of fees is based on the Size of Premise, Premise Risk Level and the Grade (Inspection Result). Combination of those values is used to define the fee Code to be used.



Each type of Fee included in the PAS Annual Fees Parameters is set up within Fee Maintenance.

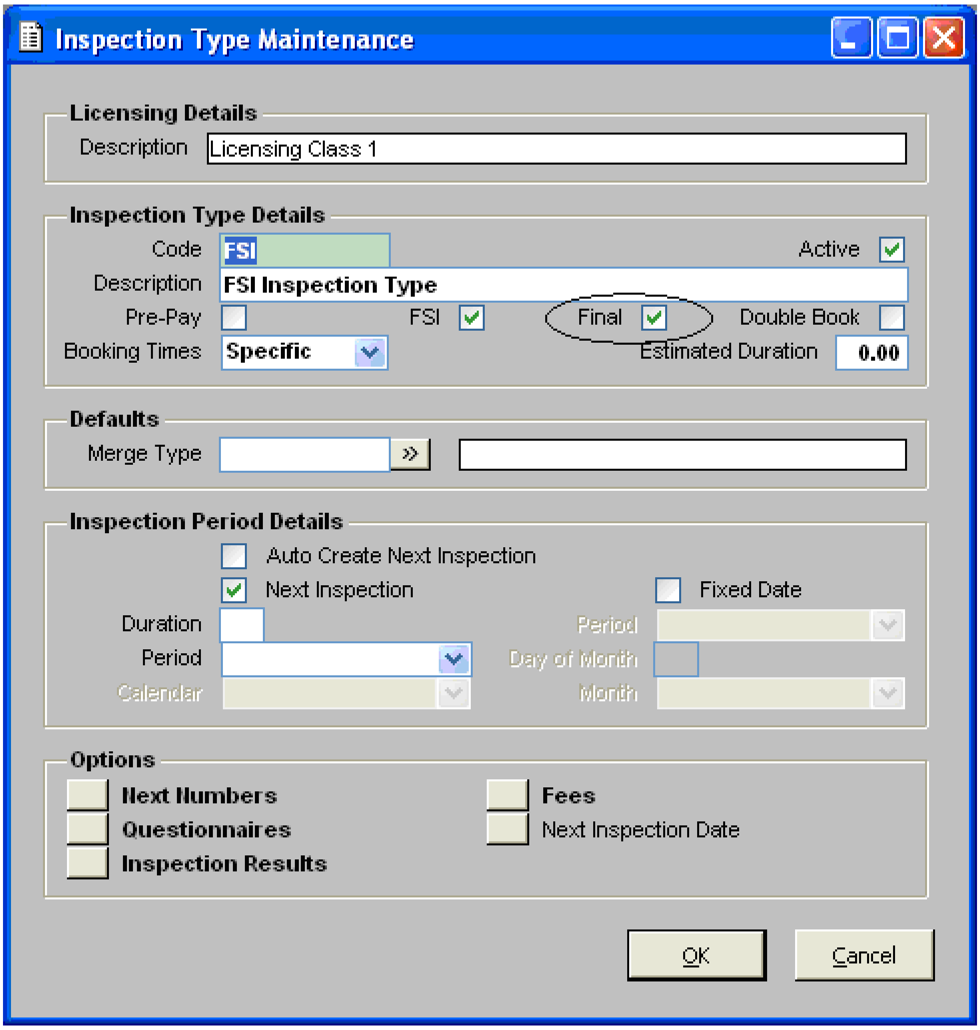


Inspection Type Maintenance.

In order to achieve the above requirements the following additional clarification is required

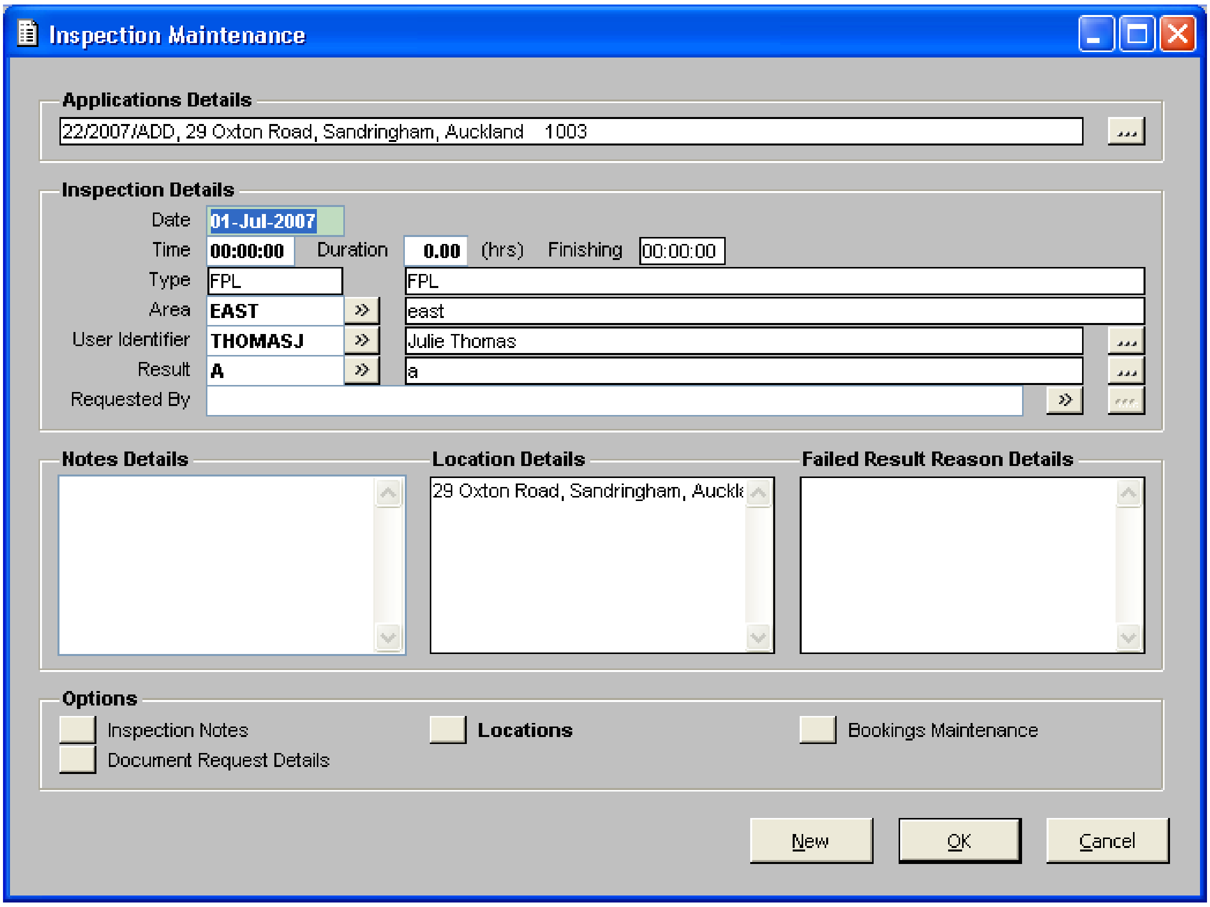
a) The Performance Assessment System is part of the Food Safety Information, so the FSI flag should be set on in order the PAS details can be accessed and maintained.

b) In order to populate the Grade Field on the PAS Maintenance form, the system must know which the latest Inspection is. This should be denoted against Type – i.e. FINAL inspection etc. An additional field is added to the Inspection Type parameter and when this is checked ON the system would know that this is the latest inspection and therefore take the value of the Result and populate the Grade field with this Inspection Result which equates to the Grade parameters.



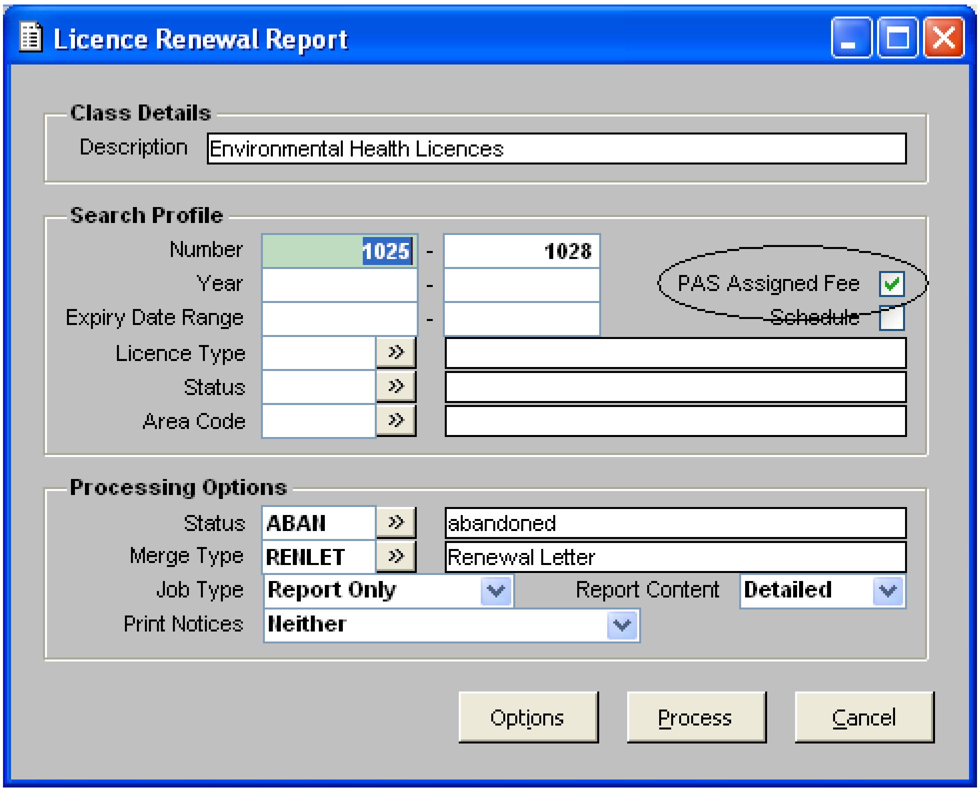
Inspection Results

The Result field in the “Final” Inspection Maintenance is now used as the Grade in the Performance Assessment System. When this value is entered, this field can not be maintained unless User has Authority in the “Change PAS”. The Grade field in the PAS record is also updated with this “Result” value.



License Renewal

The Renewal process is now having an addition flag to distinguish the Renewal is being run for “PAS” Licenses which have PAS record.



When the "PAS Assigned Fee" is ticked OFF:

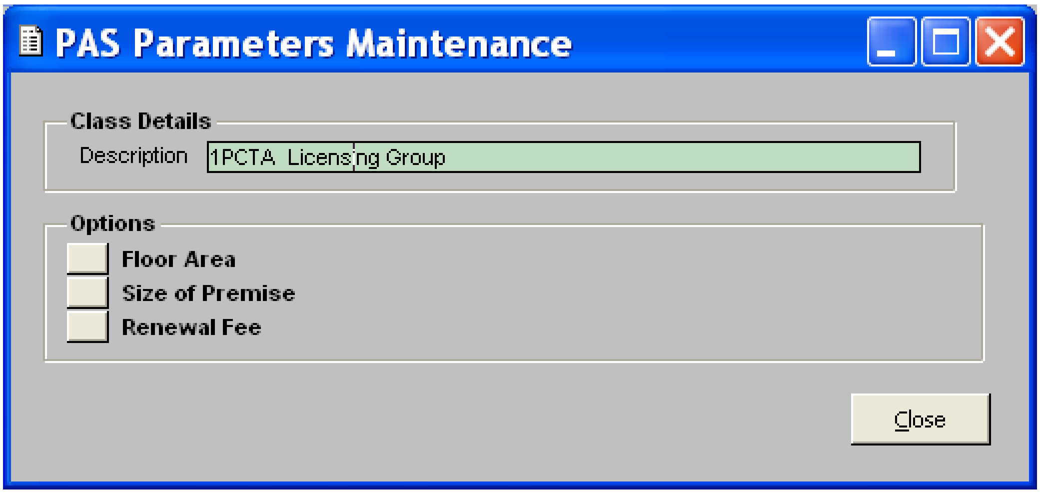
All selected Licences (that do or don't have PAS record) based on Search Profile are renewed with Fees assigned from "Renewal Fees" Parameters of the License Type.

With this the "PAS Assigned Fee" is ticked ON:

The system will select only Licenses which have PAS record and create new Fee for the License as specified in the PAS record.

Where a Licence does not have a PAS fee code associated to it – i.e. meaning all three fields have not been populated on the PAS form then this Licence will not be included in the Licence Renewal Process.

Any licences that would normally have been renewed, but have not been because the fee code does not exist on the PAS form, will be printed in an exception report.



PA Parameter Maintenance Form

PAS Parameter Maintenance – Class Details
This field displays the Class Description.

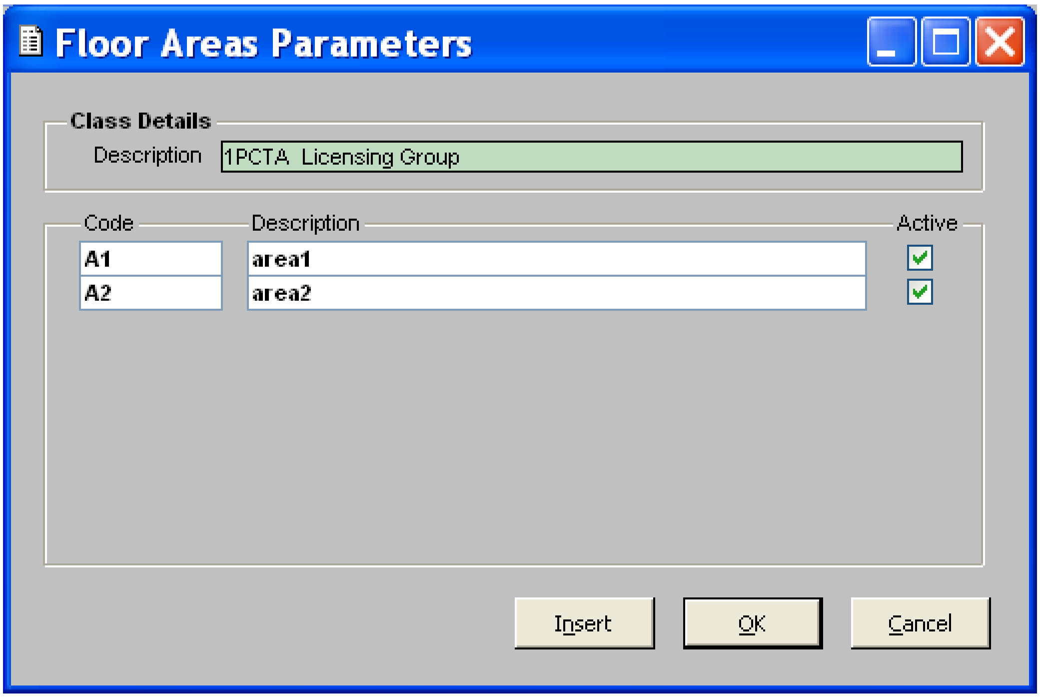
PAS Parameter Maintenance – Floor Area
This button takes the User to the form where they may set up the relevant Floor Area Codes.

PAS Parameter Maintenance – Size of Premise
This button takes the User to the form where they may set up the relevant Sizes of Premise.

PAS Parameter Maintenance – Renewal Fee
This button takes the User to the form where they may set up the relevant Renewal Fees.

Floor Area Parameters

This form allows for the set up of the size of Floor Areas of the Licenced Premise.



Floor Area Parameters Form

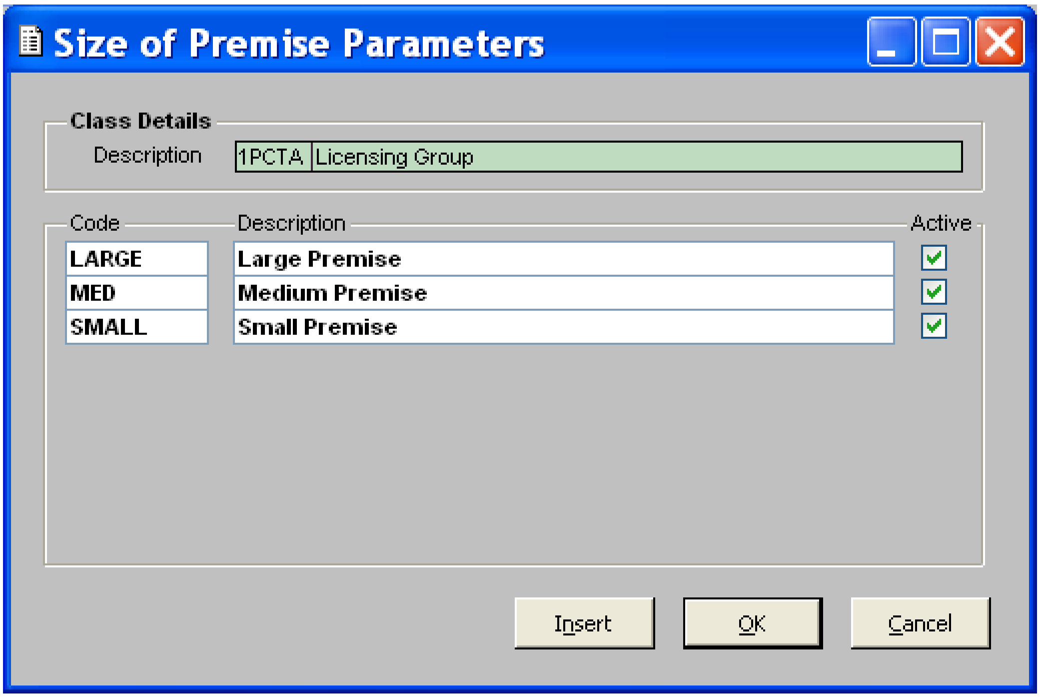
Floor Areas Parameters
This field displays the Class Description.

Floor Areas Parameters – Code
This allows for the setting up of new /amending current Floor Area Codes.

Floor Areas Parameters – Description
This field is the more detailed description of what the Floor Area Code relates to.

PAS Parameters Maintenance – Size of Premise

This set of Parameters allows for the creation / amending of Codes representing the Size of a Premise.



Size of Premise Parameters Form

Size of Premise Parameter – Class Details
This field displays the Class Description

Size of Premise Parameter – Code
This field allows for the creation or amendment of a Code referring to the size of the premises.

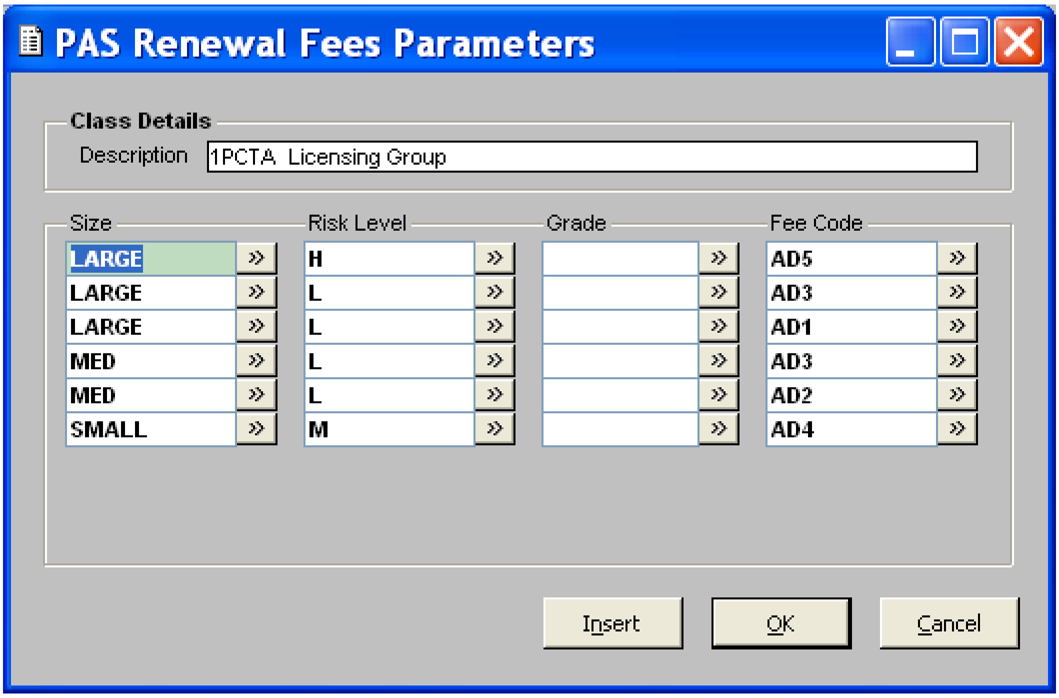
Size of Premise Parameter – Description
This field contains the description of what the code represents.

PAS Parameters Maintenance – Renewal Fee

Renewal Fees for PAS are set up in this PAS Renewal Fees Paramter and will be used in the PAS Maintenance for each Licence.

The calculation of fees is based on the size of Premise, Premise Risk Level and the Grade (Inspection Result). Combination of those values is used to define the fee code to be used.

Each type of Fee included in the PAS Annual Fees Parameters is set up within Fee Maintenance.



PAS Renewal Fees Parameters Form

PAS Renewal Fees Paramters – Class Details
This field displays the Class Description

PAS Renewal Fees Paramters – Size
Using the Pop-Up button - This field allows for the selection of a Size of Premise from the list created in the parameters Size of Premise.

PAS Renewal Fees Paramters – Risk Level
Using the Pop-Up button – this field allows for the selection of a Risk from the list created in the Premise Risk Level parameters.

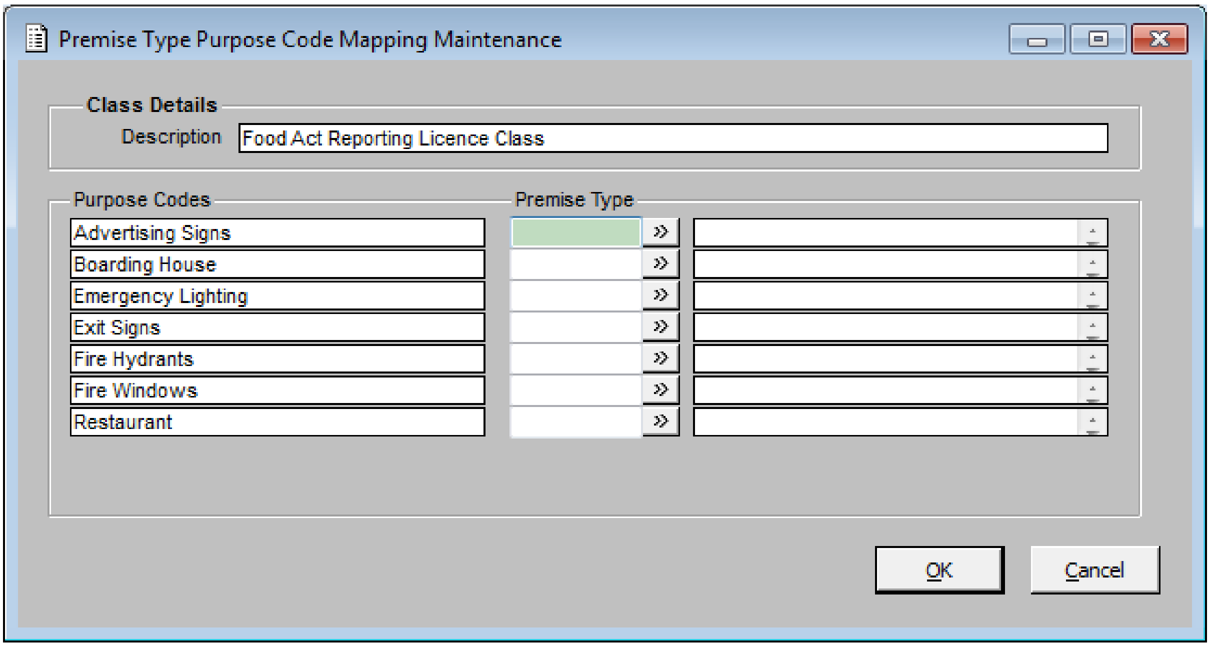
PAS Renewal Fees Paramters – Grade

Using the Pop-Up button – this field allows for the selection of the Inspection Results created in the Inspections.

PAS Renewal Fees Paramters – Fee Code
Using the Pop-Up button – this allows for the selection of the relevant Fee Code created in the Inspection Results Pop-Up.

Premise Type Purpose Code Mapping

The Premise Type Purpose Code Mapping Maintenance form enables Council to map existing Purpose Code records with Department of Health Premise Type records.



Premise Type Purpose Code Mapping Maintenance form

Class Details – Description
This field displays the description of the selected Class.

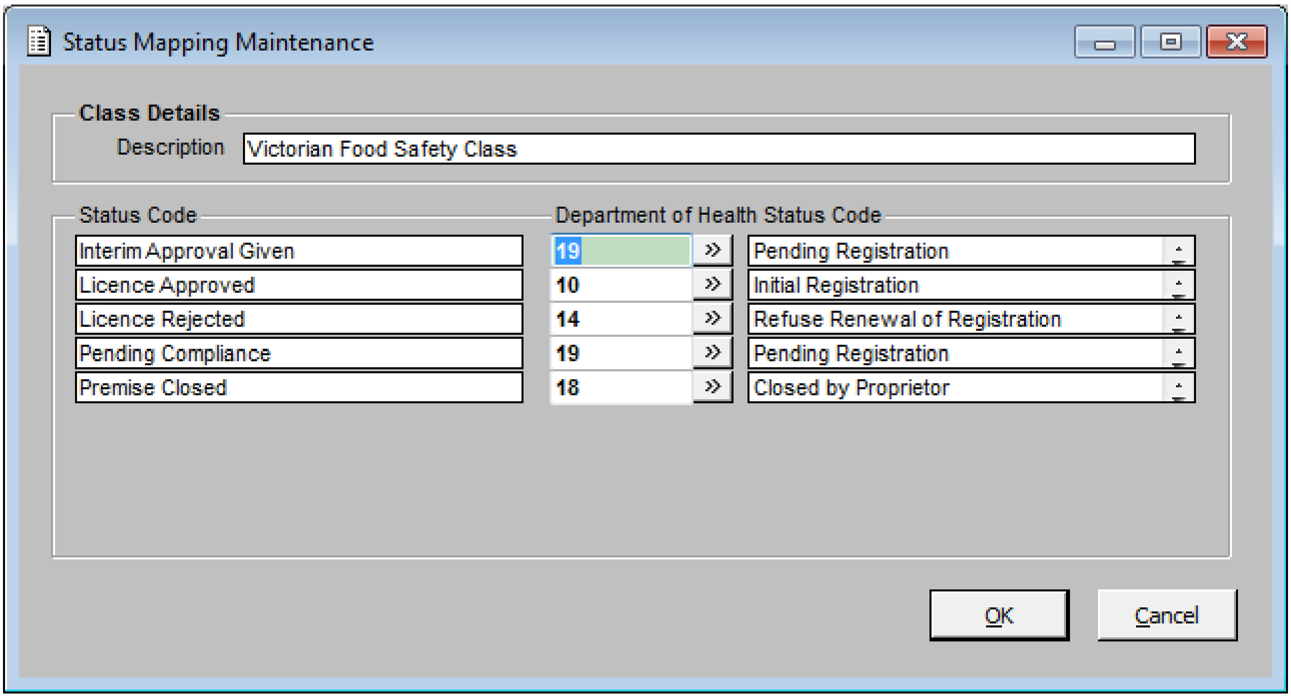
Purpose Codes
This field displays the list of purpose codes used by Council.

Premise type
This field allows council to select the relevant Premise type to be linked to the Purpose Code.

Premise type description
This field displayes the description of the Premise Type.

Status Type Mappings

The Status Mapping Maintenance form enables Council to map existing Status records with Department of Health Status Type records.



Status Mapping Maintenance form

Class Details
This field displays the description of the selected Class.

Status Code
This field displays a list of Status Codes currently in use by Council.

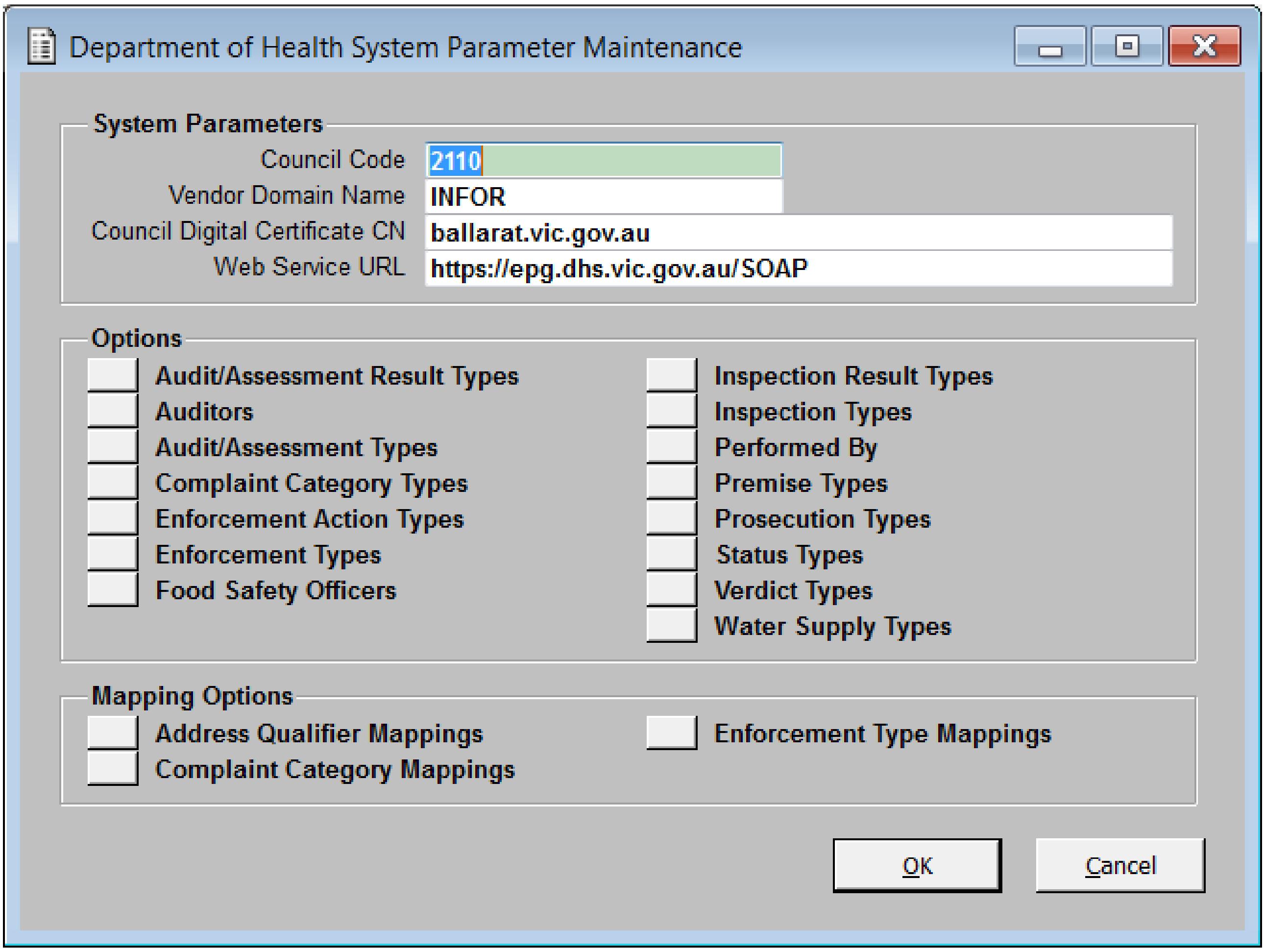
Department of Health Status Code
This field allows Council the ability to map their Status Codes to those required by the Department of Health. The Department of Health codes are entered in via parameters in the Department of Health set of parameters.

Department of Health Status Code
This field displays the description that is linked to the Department of Health's status code.

Department of Health

Department of Health System Parameter Maintenance

The new menu option, Department of Health Parameters, has been introduced. This option enables Council to maintain parameters that are specific to the Victorian Department of Health Reporting functionality.



Department of Health System Parameter Maintenace form

System Parameters – Council Code

Each Council has been allocated a Council Code by the Department of Health, the relevant code should be entered here.

Code	Council Name
2120	City of Ballarat
10394	City of Darebin
2519	City of Greater Geelong
2780	City of Greater Shepparton
2787	City of Kingston
2793	City of Maroondah
6694	City of Port Phillip

2776	East Gippsland Shire Council
6305	Frankston City Council
2778	Glen Eira City Council
10281	Greater Bendigo City Council
6402	Knox City Council
2788	Latrobe City Council
6480	Melbourne City Council
2797	Monash City Council
2798	Moonee Valley City Council
10396	Moreland City Council
2802	Nillumbik Shire Council
2816	Shire of Yarra Ranges
10244	South Gippsland Shire Council
10416	Wodonga City Council
2811	Whitehorse
2790	Macedon Ranges Shire Council

System Parameters – Vendor Domain Name

The Vendor Domain Name field holds the name of the Software vendor responsible for providing the Food Safety reporting functionality. In the case of Pathway, this is INFOR.

System Parameters – Council Digital Certificate CN

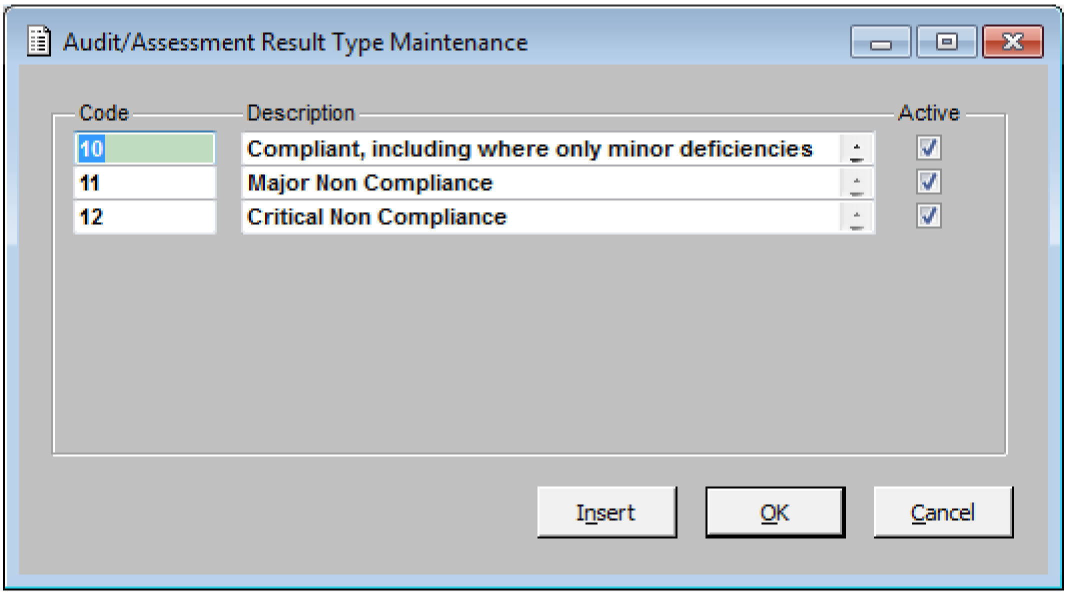
The Council Digital Certificate Common Name (CN) field holds the Common Name property of the Client Digital Certificate, registered with the Department of Health, to enable secure communication between Council and Department of Health systems.

System Parameters – Web Service URL

The Web Service URL field holds the URL, provided by the Department of Health, used by Pathway in making web service calls to send Food Safety reports to the Department of Health. This field will be pre-populated for you.

Audit/Assessment Result Type Maintenance

The Audit/Assessment Result Type Maintenance form provides Council with the ability to maintain Department of Health Result Type codes that are specific to Audits/Assessments conducted by Council. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually.



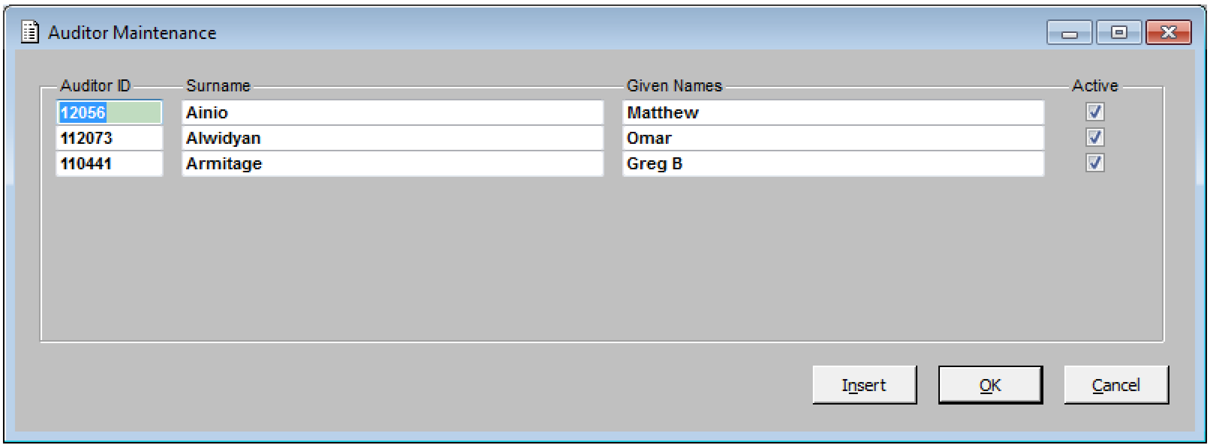
Audit/Assessment Result Type Maintenance form

Audit/Assessment Result Type Maintenance – Code and description
This field contains the code number and description provided by Department of Health for the Audit/Assessment Result.

Audit/Assessment Result Type Maintenance – Active
This denotes whether or not the code is active (ie selectable) or not.

Auditors

The Auditor Maintenance form enables Council to create records for 3rd Party Auditors that perform inspections on licensed premises.



Auditor Maintenance form

A full list of registered Auditors can be accessed from the following website:
http://www.health.vic.gov.au/foodsafety/bus/auditing.htm

Auditor Maintenance - Auditor ID
This is the Auditor ID nominated by Department of Health .

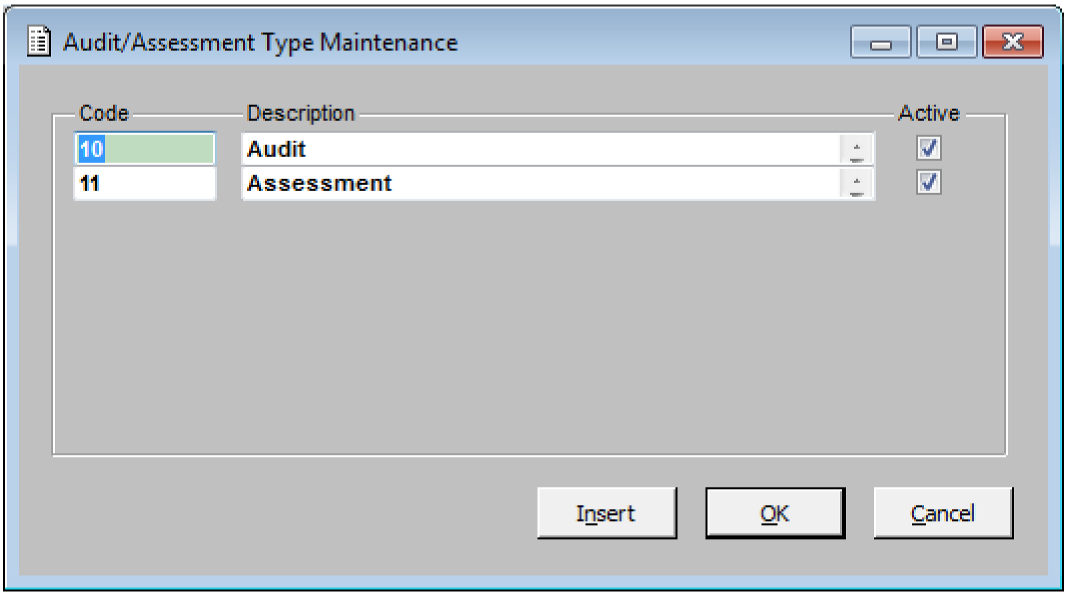
Auditor Maintenance - Surname
This field is where the surname of the Auditor is entered.

Auditor Maintenance – Given Name
This field is where the given name(s) of the Auditor is entered.

Auditor Maintenance – Active
This flag denotes whether or not this code is currently active

Audit/Assessment Types

The Audit/Assessment Maintenance form enables Council to maintain Department of Health Audit/Assessment Type records. These records identify the type of Audit/Assessment conducted by a Council. These records can later be linked to existing Pathway Inspection Type records. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually. Where the Description is longer than the displayed field, double clicking in the field will zoom the field to show the full description.



Audit/Assessment Type Maintenance form

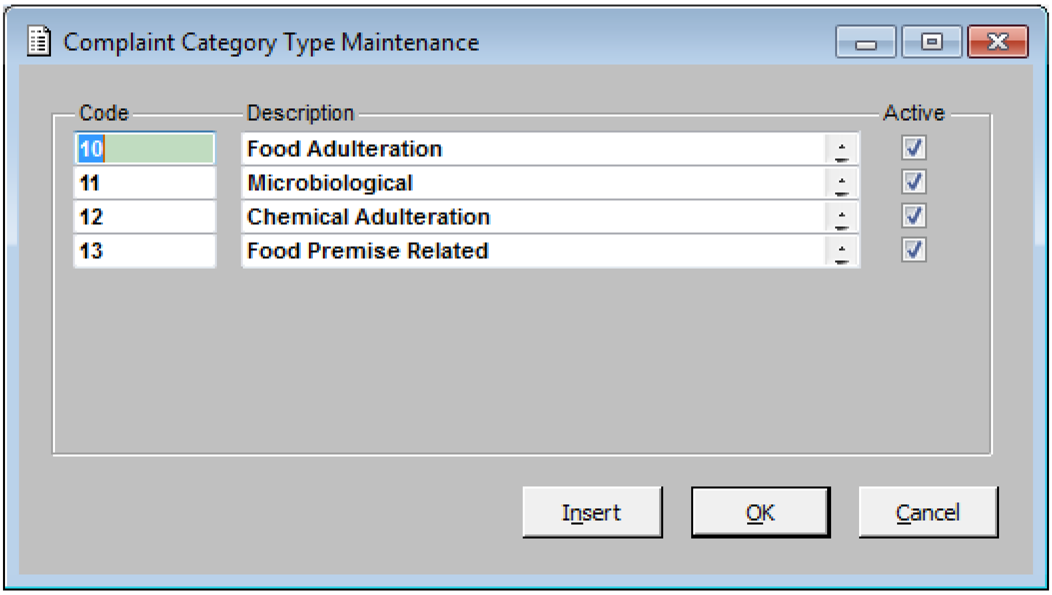
Audit/Assessment – Code
Unique code that identifies the Audit/Assessment Type.

Audit/Assessment – Description
Description of the Audit/Assessment Type.

Audit/Assessment – Active
This flag denotes whether or not this code is currently active.

Complaint Category Types

The Complaint Category Type Maintenance form enables Complaint Categories, as defined by the Department of Health, to be maintained. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually. Where the Description is longer than the displayed field, double clicking in the field will zoom the field to show the full description.



Complaint Category Type Maintenance form

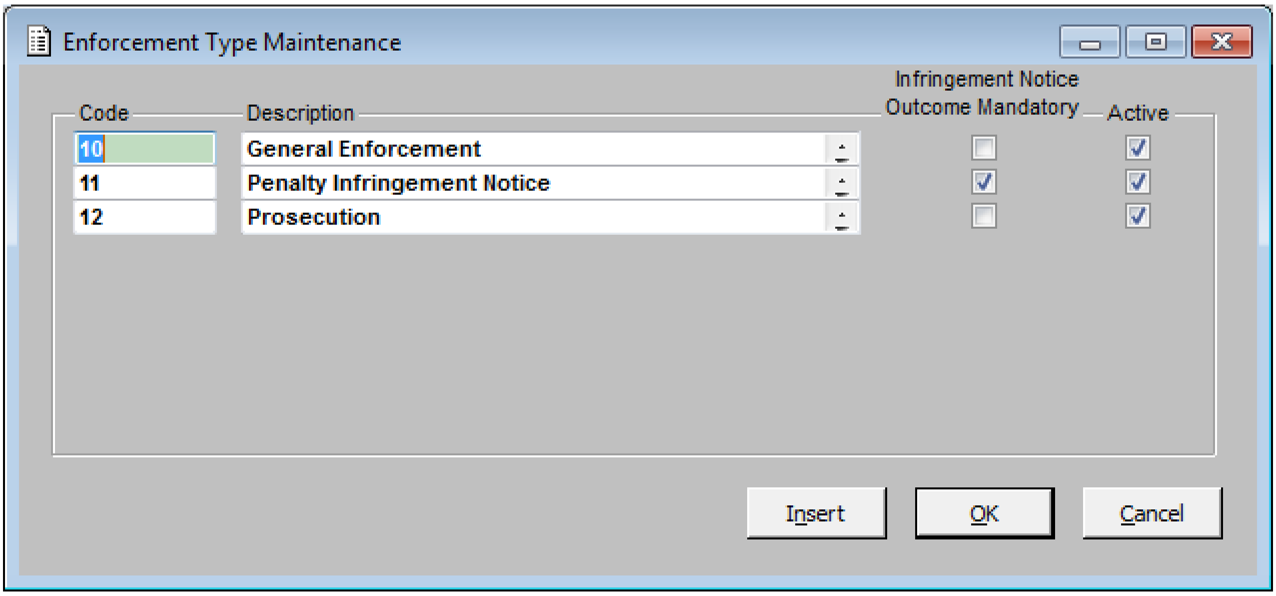
Complaint Category Types - Code
This is the complaint code issued by the Department of Health.

Complaint Category Types – Description
This is the Description of the complaint code.

Complaint Category Types – Active
This flag denotes whether or not this code is currently active.

Enforcement Types

The Enforcement Type Maintenance form enables Council to maintain Enforcement Types, as defined by the Department of Health. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually. Where the Description is longer than the displayed field, double clicking in the field will zoom the field to show the full description.



Enforcement Type Maintenance form

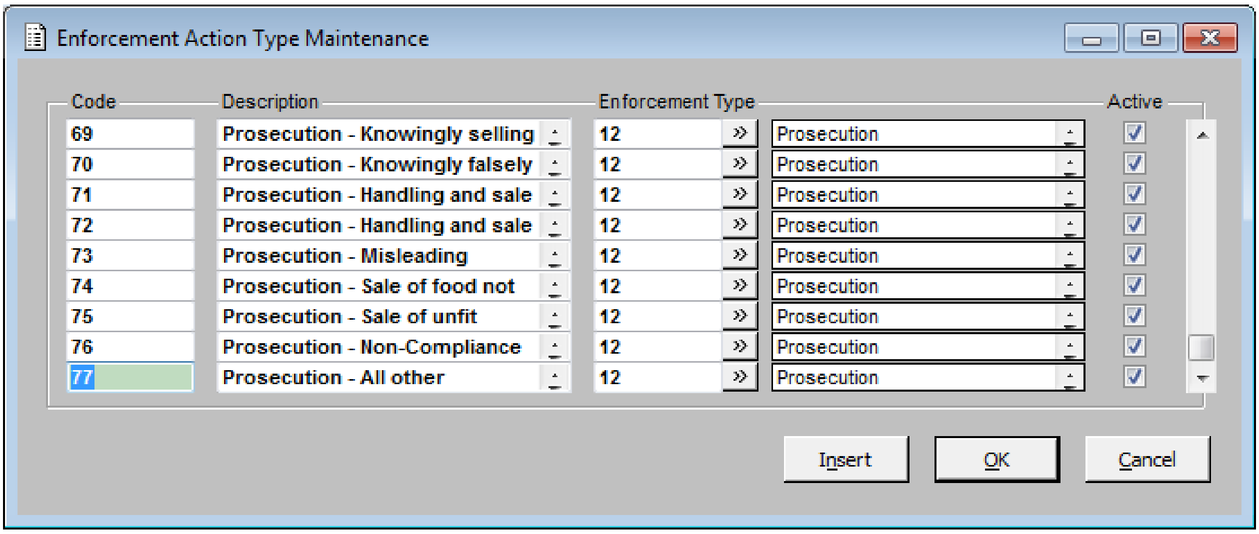
Enforcement types – Code
This is the enforcement type code issued by the Department of Health.

Enforcement types – Description
This is the description of the Enforcement Type.

Enforcement types – Active
This flag denotes whether or not this code is currently active.

Enforcement Action Types

The Enforcement Action Type Maintenance form enables Council to maintain Enforcement Action Types defined by the Department of Health. Each Enforcement Action Type is linked to an Enforcement Type, which is mandatory. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually. Where the Description is longer than the displayed field, double clicking in the field will zoom the field to show the full description.



Enforcement Action Type Maintenance form

Enforcement Action Types - Code
This is the Enforcement Action Type Code issued by the Department of Health.

Enforcement Action Types – Description
This is the description of the Enforcement Action Type.

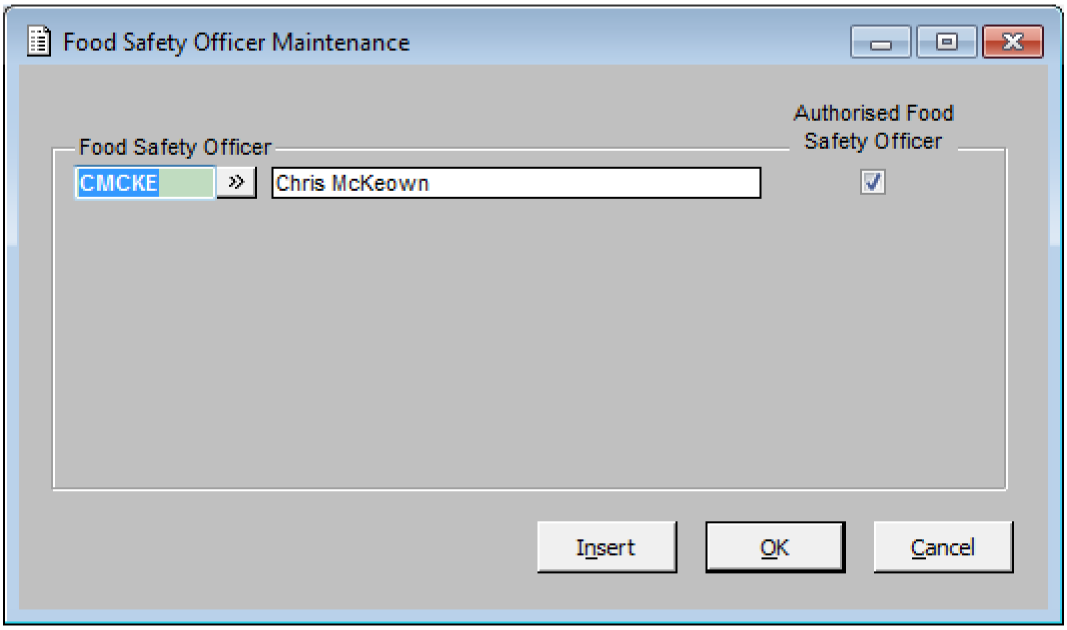
Enforcement Action Types – Enforcement Type
This field allows Council to link the Enforcement Action Type with the Enforcement Type.

Enforcement Action Types – Enforcement Type Description
This field is populated with the Enforcement Type Description.

Enforcement Action Types – Active
This flag denotes whether or not this code is currently active.

Food Safety Officers

The Food Officer Maintenance form enables Council to nominate users that perform Food Safety Inspections and are employed by Council.



Food Officer Maintenance form

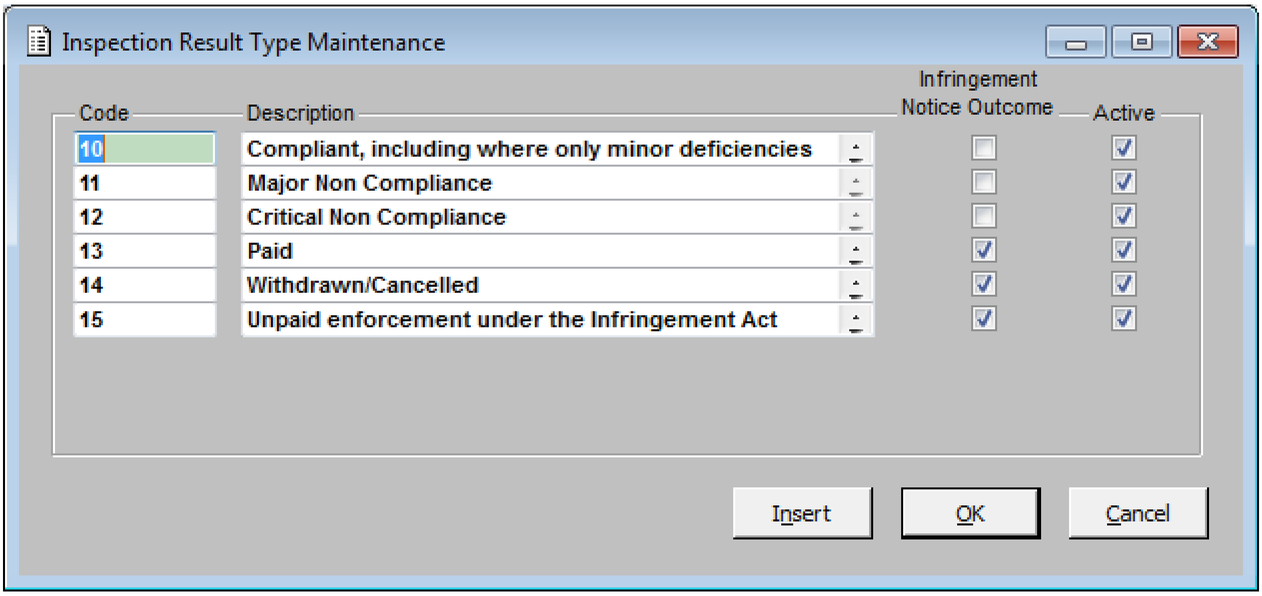
Food Safety Officer Maintenance – Food Safety Officer
This field allows Council the ability to identify members of staff who are designated as Food Safety Officers. By using the pop up button the user will be presented with the ability to select the relevant Food Safety Officer from the list of user registered in Pathway.

Food Safety Officer Maintenance – Name of Food Safety Officer
This field will display the name of the Food Safety Officer.

Food Safety Officer Maintenance – Authorised Food Safety Officer
Flag that indicates whether the Food Officer is authorised under the Food Act 1984.

Inspection Result Types

The Inspection Result Type Maintenance form enables Council to maintain Department of Health Result Type records. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually. Where the Description is longer than the displayed field, double clicking in the field will zoom the field to show the full description.



Inspection Result Type Maintenance form

Inspection Result Types Maintenance - Code
This field allows for the input of Inspection Results Codes - Currently the 3 Inspection Result Type Codes to have an Infringement Notice Outcome have been pre- checked on any new codes issued by the Department of Health will have to be added manually.

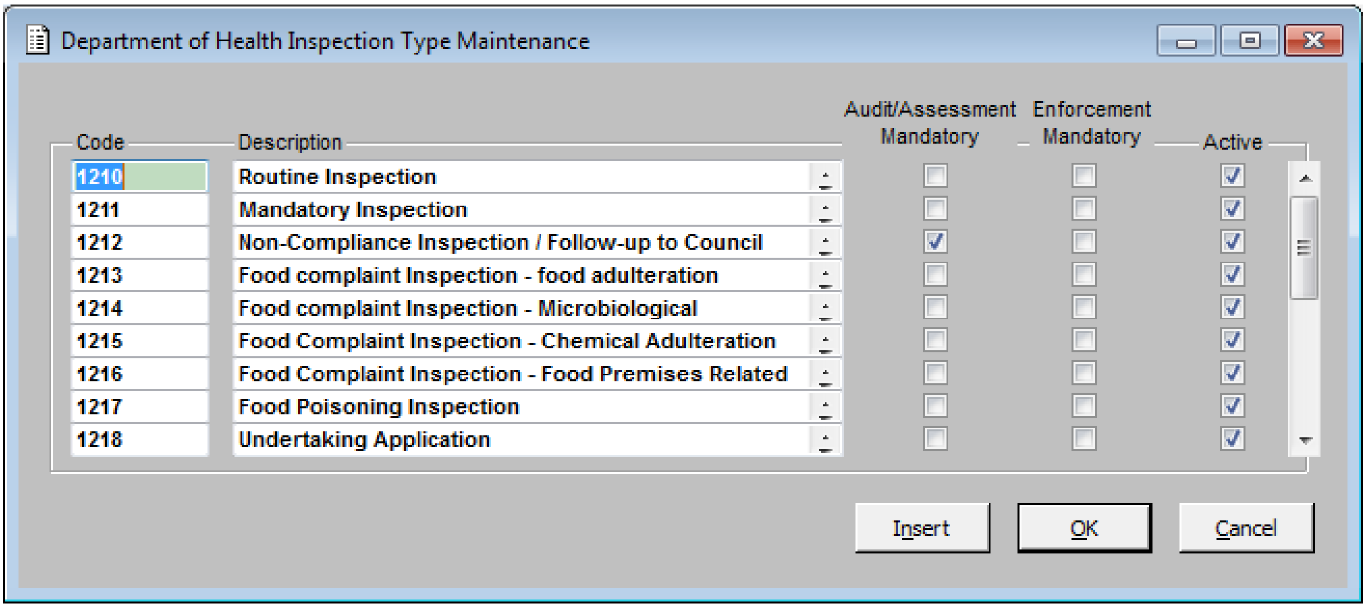
Inspection Result Types Maintenance – Description
This field allows for the input of the Inspections Results Description - Currently the 3 Inspection Result Type Descriptions to have an Infringement Notice Outcome have been pre- checked on any new descriptions issued by the Department of Health will have to be added manually.

Inspection Result Types Maintenance – Infringement Notice Outcome
Should the Inspection result require an Infringement Notice Outcome this flag is set ON. Currently the 3 Inspection Result Type Codes to have an Infringement Notice Outcome have been pre- checked on.

Inspection Result Types Maintenance – Active
This flag is set ON when the Inspection Result code is active, therefore available for use.

Inspection Type Maintenance

The Department of Health Inspection Type Maintenance form enables Council to maintain Inspection Type records defined by the Department of Health. These Inspection Type records can later be linked to existing Pathway Inspection Types. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually. Where the Description is longer than the displayed field, double clicking in the field will zoom the field to show the full description.


Department of Health Inspection Type Maintenance

Code	Description	Audit/Assessment Mandatory	Enforcement Mandatory	Active
1210	Routine Inspection			✓
1211	Mandatory Inspection			✓
1212	Non-Compliance Inspection / Follow-up to Council	✓		✓
1213	Food complaint Inspection - food adulteration			✓
1214	Food complaint Inspection - Microbiological			✓
1215	Food Complaint Inspection - Chemical Adulteration			✓
1216	Food Complaint Inspection - Food Premises Related			✓
1217	Food Poisoning Inspection			✓
1218	Undertaking Application			✓

Insert OK Cancel

Department of Health Inspection Type form

Department of Health Inspection Type Maintenance – Code
Unique code that identifies the Inspection Type.

Department of Health Inspection Type Maintenance – Description
This is the full description of the Code.

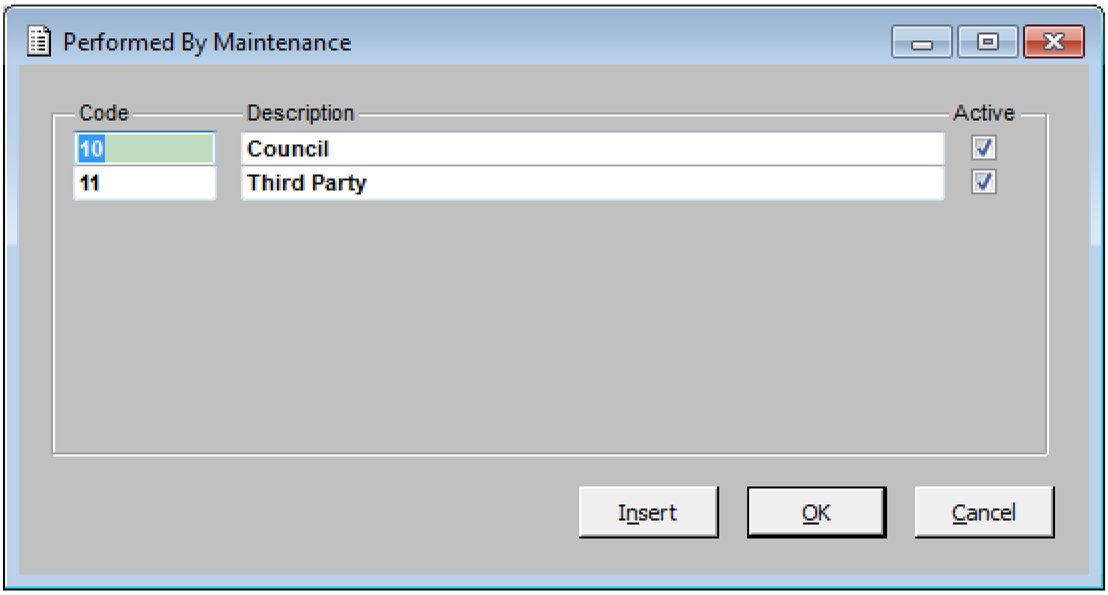
Department of Health Inspection Type Maintenance – Audit/ Assessment Mandatory
This flag indicates whether a link to a pre-existing Audit/Assessment record is mandatory. This parameter comes into play when maintaining an Inspection, which may be the result of an Audit/Assessment previously, conducted.

Department of Health Inspection Type Maintenance – Enforcement Mandatory
This flag indicates whether a link to an Enforcement record is required for Inspections that are conducted.

Department of Health Inspection Type Maintenance – Active
This flag is set ON when the Inspection code is active, therefore available for use.

Performed By Maintenance

This is a standard Pathway parameter form with code and description. These will be pre-populated with the two current codes – 10 – Council and 11 – Third Party.



Performed By Maintenance form

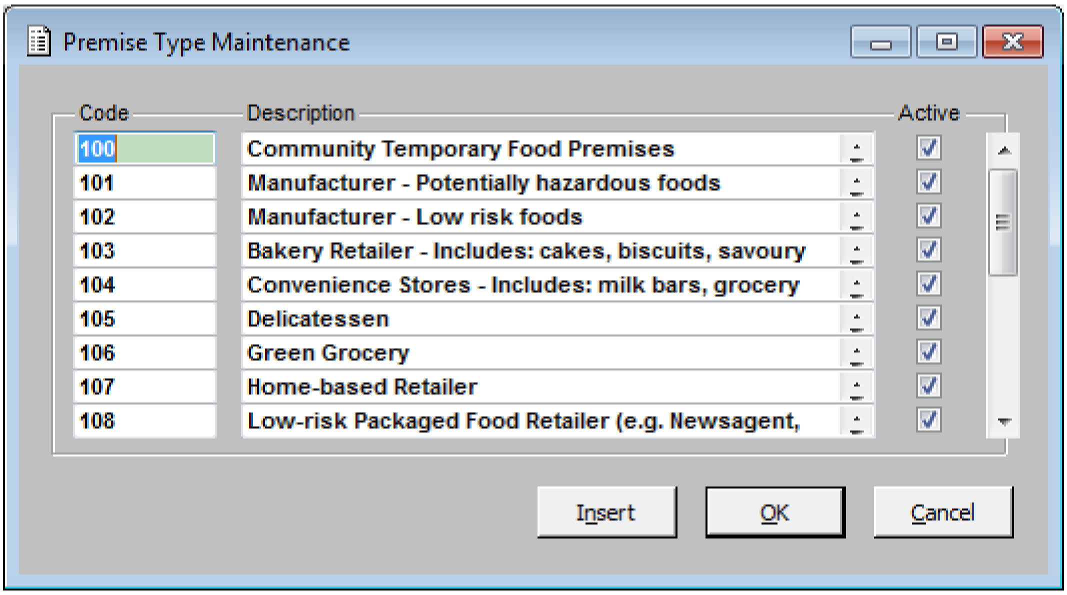
Performed by Maintenance – Code
This is a standard Pathway parameter form with code and description. These will be pre-populated with the two current codes – 10 – Council and 11 – Third Party.

Performed by Maintenance – Description
This field displays the description of the Code.

Performed by Maintenance – Active
This flag is set ON when the Performed By code is active, therefore available for use.

Premise Type Maintenance

The Premise Type Maintenance form enables Council to maintain Premise Type records defined by the Department of Health. These records identify the type of premise licensed by Council. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually. Where the Description is longer than the displayed field, double clicking in the field will zoom the field to show the full description.



Premise Type Maintenance form

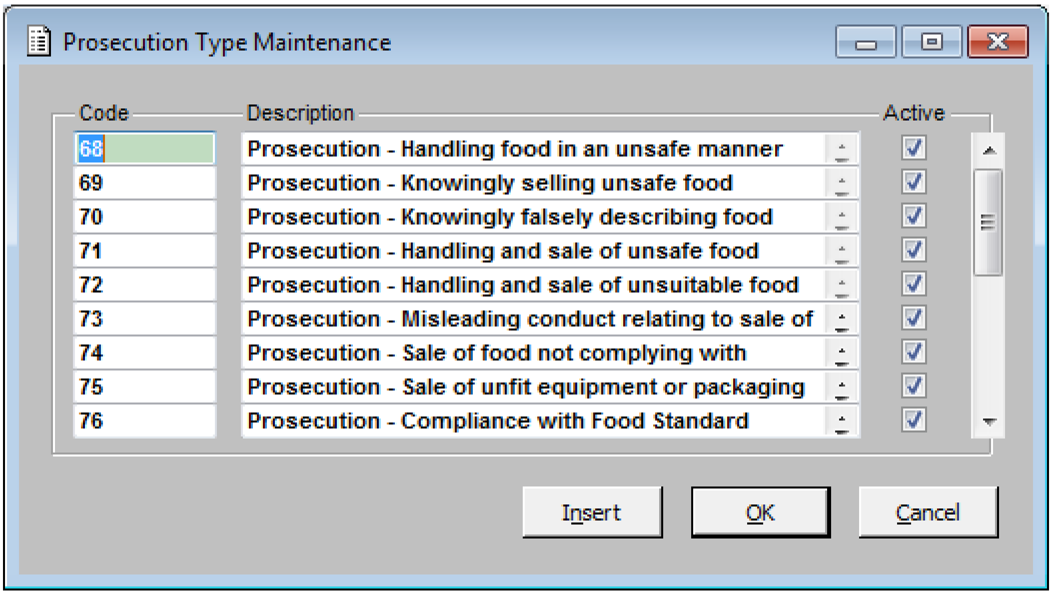
Premise Type Maintenance – Code
This field contains the Premise Type Code.

Premise Type Maintenance – Description
This field contains the description of the Premise Type Code.

Premise Type Maintenance – Active
This flag is set ON when the Premise Type code is active, therefore available for use.

Prosecution Types

This is a standard Pathway parameter form with code and description. These will be pre-populated with codes provided by the Department of Health.
The ability to create new codes for future requirements has been made available.



Prosecution Type Maintenance form

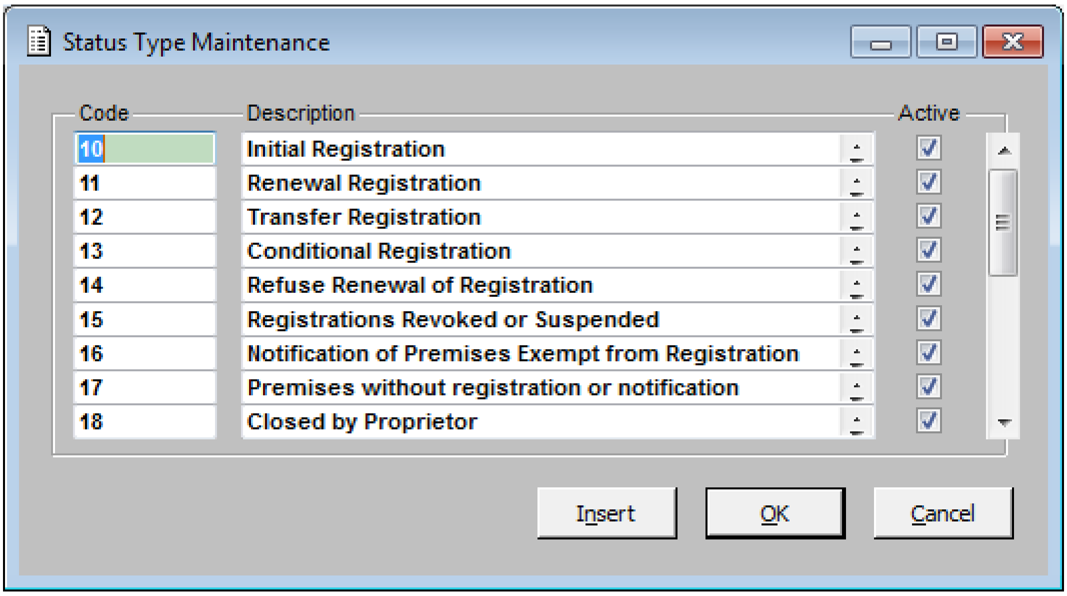
Prosecution Type Maintenance – Code
This field contains the Code for the Prosecution type – this has been prepopulated with the currently known codes.

Prosecution Type Maintenance – Description
This field contains the description of the Prosecution type codes.

Prosecution Type Maintenance – Active
This flag is set ON when the Prosecution Type code is active, therefore available for use.

Status Type Maintenance

The Status Type Maintenance form enables Council to maintain Status Type records defined by the Department of Health. These records identify the status of a licensed premise and can be mapped to existing Pathway Licensing Status records via Food Safety parameters in the relevant Licensing class. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually.



Status Type Maintenance form

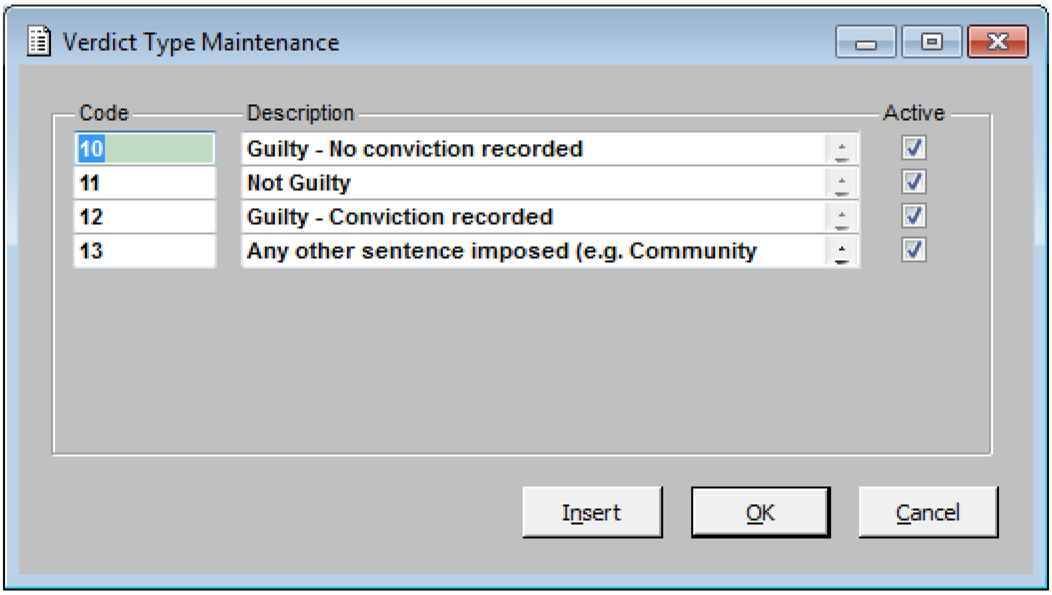
Status Type Maintenance – Code
This field contains the code for the Status Type Maintenance – these have been prepopulated with the currently known codes.

Status Type Maintenance – Description
This field contains the description of the Status Type Code.

Status Type Maintenance – Active
This flag is set ON when the Status Type code is active, therefore available for use.

Verdict Type Maintenance

The Verdict Type Maintenance form enables Council to maintain Verdict Type records defined by the Department of Health. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually. Where the Description is longer than the displayed field, double clicking in the field will zoom the field to show the full description.



Verdict Type Maintenance form

Verdict Type Maintenance – Code
This field contains the Verdict Type Code, these have been prepopulated with the currently known codes.

Verdict Type Maintenance – Description
This field contains the description of the Code.

Verdict Type Maintenance – Active
This flag is set ON when the Verdict Type code is active, therefore available for use.

Water Supply Type Maintenance

The Water Supply Type Maintenance form enables Council to maintain Water Supply Type records defined by the Department of Health. These fields will be pre-populated for you with the currently known codes. In future these may need to be added to manually. Where the Description is longer than the displayed field, double clicking in the field will zoom the field to show the full description.

Water Supply Type Maintenance form

Water Supply Type Maintenance – Code
This field contains the code for the relevant Water Supply – these have been prepopulated.

Water Supply Type Maintenance – Description
This field contains the Description of the Water Supply code.

Water Supply Type Maintenance – Active
This flag is set ON when the Water Supply Type code is active, therefore available for use.

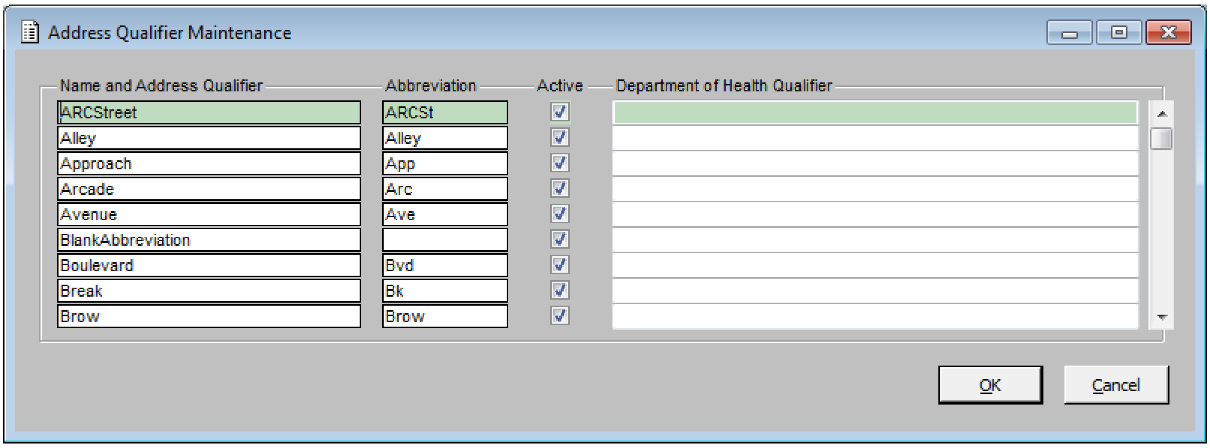
Address Qualifier Maintenance

***** Please note that we now know that this has not been made a mandatory requirement, so this option could be left without the mapping being actioned. However we will leave the functionality available in case at a later date this does become mandatory.**

Address Qualifier Maintenance

The Address Qualifier Maintenance form enables Council to map Pathway Street/Road Type Qualifier abbreviations with Department of Health Street/Road Type Qualifier abbreviations.

The Food Safety Report produced for the Department of Health requires address information to be extracted. However, there exists the potential for Street/Road Type Qualifiers defined within Pathway not to match those defined by the Department of Health. This form addresses this issue and provides Council with the ability to map the Qualifiers for records where the abbreviations between Council and the Department of Health do not match.



Address Qualifier Maintenance form

Address Qualifier Maintenance – Name and Address Qualifier
The left hand side of the form is populated with the sites existing Pathway Name and Address Qualifiers. **Where these match the Department of Health Qualifiers, you do not have to change anything in the right hand side of the form, however if these differ you would need to map the code based on the list provided below:**

Road Type Code	Road Type Description
Ally	Alley
Alwy	Alleyway
Ambl	Amble
Ancg	Anchorage
App	Approach
Arc	Arcade
Art	Artery

Ave	Avenue
Ayys	Access
Basn	Basin
Bch	Beach
Bdge	Bridge
Bdwy	Broadway
Bend	Bend
Blk	Block
Brae	Brae
Brce	Brace
Brk	Break
Brow	Brow
Bvd	Boulevard
Bypa	Bypass
Bywy	Byway
Caus	Causeway
Cds	Cul-de-sac
Ch	Chase
Cir	Circle
Cl	Close
Clde	Colonnade
Clt	Circlet
Cmmn	Common
Cnr	Corner
Cnwy	Centreway
Con	Concourse
Cove	Cove
Cowy	Crossway
Cps	Copse
Crcs	Circus
Crd	Crossroad
Cres	Crescent
Crsg	Crossing
Crss	Cross
Crst	Crest
Cso	Corso
Ct	Court
Ctr	Centre
Cttg	Cutting
Ctyd	Courtyard
Cuwy	Cruiseway
Dale	Dale
Dell	Dell
Devn	Deviation
Dip	Dip
Dr	Drive
Drwy	Driveway
Dstr	Distributor
Edge	Edge
Elb	Elbow
End	End
Ent	Entrance
Esp	Esplanade
Est	Estate
Exp	Expressway
Extn	Extension
Fawy	Fairway
Fitr	Fire trail
Flat	Flat

Folw	Follow
Form	Formation
Frnt	Front
Frtg	Frontage
Fshr	Foreshore
Ftrk	Fire track
Ftwy	Footway
Fwy	Freeway
Gap	Gap
Gdn	Garden
Gdns	Garden(s)
Gld	Glade
Glen	Glen
Gly	Gully
Gr	Grove
Gra	Grange
Grn	Green
Grnd	Ground
Gte	Gate
Gtes	Gate(s)
Hill	Hill
Hrd	Highroad
Hts	Heights
Hwy	Highway
Intg	Interchange
Intn	Intersection
Jnc	Junction
Key	Key
Lane	Lane
Ldg	Landing
Lees	Lees
Line	Line
Link	Link
Lkt	Lookout
Lnwy	Laneway
Loop	Loop
Lt	Little
Lwr	Lower
Mall	Mall
Mews	Mews
Mndr	Meander
Mt	Mount
Mwy	Motorway
Nook	Nook
Otlk	Outlook
Park	Park
Part	Part
Pass	Pass
Path	Path
Pde	Parade
Phwy	Pathway
Piaz	Piazza
Pkld	Parklands
Pkt	Pocket
Pkwy	Parkway
Pl	Place
Plat	Plateau
Plza	Plaza
Pnt	Point

Port	Port
Prom	Promenade
Qdgl	Quadrangle
Qdrt	Quadrant
Quad	Quad
Qy	Quay
Qys	Quay(s)
Ramp	Ramp
Rch	Reach
Rd	Road
Rdge	Ridge
Rds	Roads
Rdsd	Roadside
Rdwy	Roadway
Res	Reserve
Rest	Rest
Rgwy	Ridgeway
Ride	Ride
Ring	Ring
Rise	Rise
Rmbl	Ramble
Rnd	Round
Rnde	Ronde
Rnge	Range
Row	Row
Rowy	Right of Way
Rsbl	Rosebowl
Rte	Route
Rtt	Retreat
Rty	Rotary
Rue	Rue
Run	Run
Rvr	River
Rvra	Riviera
Rvwy	Riverway
Sbwy	Subway
Sdng	Siding
Shwy	State Highway
Slpe	Slope
Snd	Sound
Spur	Spur
Sq	Square
St	Street
Stps	Steps
Stra	Strand
Strp	Strip
Strs	Stairs
Swy	Service Way
Tarn	Tarn
Tce	Terrace
Thor	Thoroughfare
Tkwy	Trunkway
Tlwy	Toll way
Top	Top
Tor	Tor
Tri	Triangle
Trk	Track
Trl	Trail
Trlr	Trailer

Turn	Turn
Twrs	Towers
Upas	Underpass
Upr	Upper
Vale	Vale
Vdct	Viaduct
View	View
Vlls	Villas
Vsta	Vista
Wade	Wade
Walk	Walk
Way	Way
Whrf	Wharf
Wkwy	Walkway
Wynd	Wynd
Yard	Yard
Yyt	Circuit

Address Qualifier Maintenance – Abbreviation
This field displays the abbreviated description of the Name and Address Qualifier.

Address Qualifier Maintenance – Active
This flag is set ON when the Address Qualifier is active, therefore available for use.

Address Qualifier Maintenance – Department of Health Qualifier
Where the Pathway Qualifier matches the Department of Health Qualifiers, you do not have to change anything in the right hand side of the form, however if these differ you would need to map the code based on the list linked to the field Name and Addresss Qualifier.

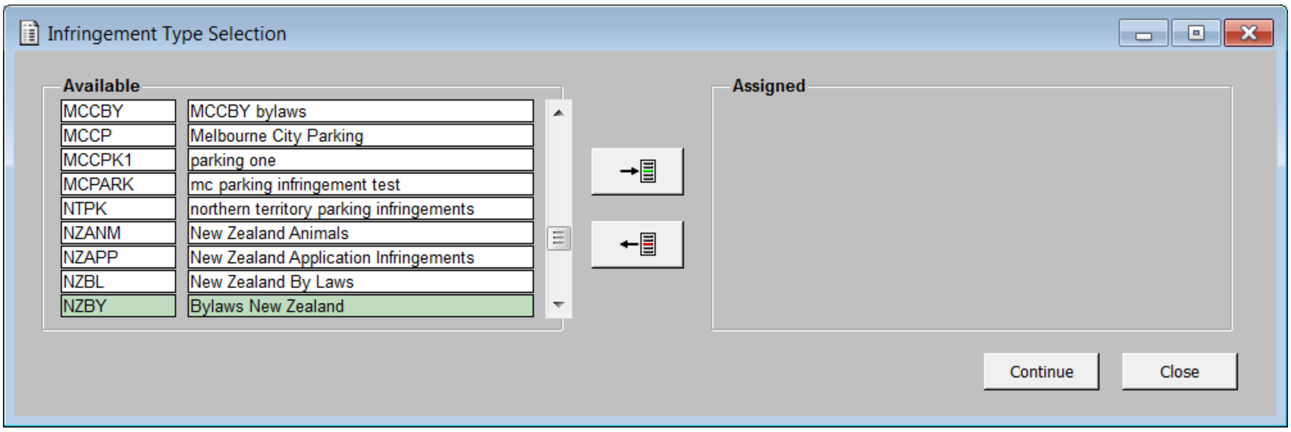
Enforcement Type Mapping Maintenance

The Department of Health Enforcement Type Mapping Maintenance form enables Council to map Enforcement Type records with Offence Type records that exist within the Pathway Infringements module. This mapping capability enables those Councils that record Enforcement information within the Infringements module to continue to do so. Upon entering the Enforcement Type Mappings form users will be presented with the Infringement Type Selection form.

The mapping between Enforcement Types and Offence Types is used in the Food Safety reporting process. Infringements linked to a Licence will have their information extracted, however the Offence information extracted will be the mapped Enforcement Type, which is relevant to the Department of Health.

Where a site does not use Pathway Infringements Module, set up is not required in this area. Sites will need to use the Enforcements Maintenance when this becomes available. If the option is clicked on in error, sites will receive a warning advising that the Module is not active.

Where a site revisits this form the originally assigned Infringement Types is not displayed automatically, as its purpose is purely to filter the Offence Types displayed in the subordinate forms.

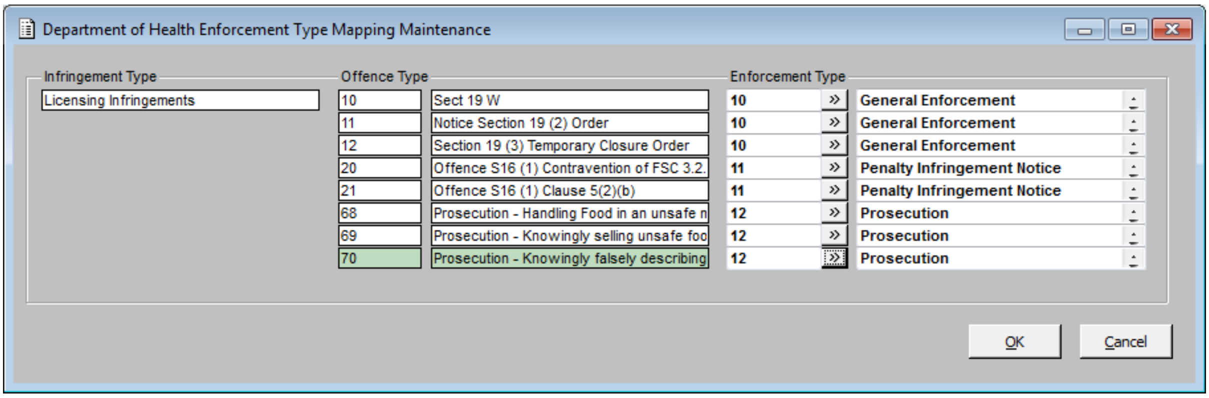


Infringement Type Selection form

Infringement Type Selection – Available

These fields show the Available Infringement Types and Descriptions which can be moved to the right hand side (Assigned).

Once the relevant Types are assigned and the Continue button is selected users will be presented with the form below.



Department of Health Enforcement Type Mapping Maintenance form

Department of Health Enforcement Type Mapping Maintenance – Infringement Type

This is the name of the selected Infringement Type.

Department of Health Enforcement Type Mapping Maintenance – Offence Type and Description

These fields contains the Offence Type and Description that are linked to the selected Infringement Type.

Department of Health Enforcement Type Mapping Maintenance – Enforcement Type

Using the pop up button select the relevant Department of Health Enforcement Type from the list displayed.

Department of Health Enforcement Type Mapping Maintenance – Department of Health Enforcement Type Description

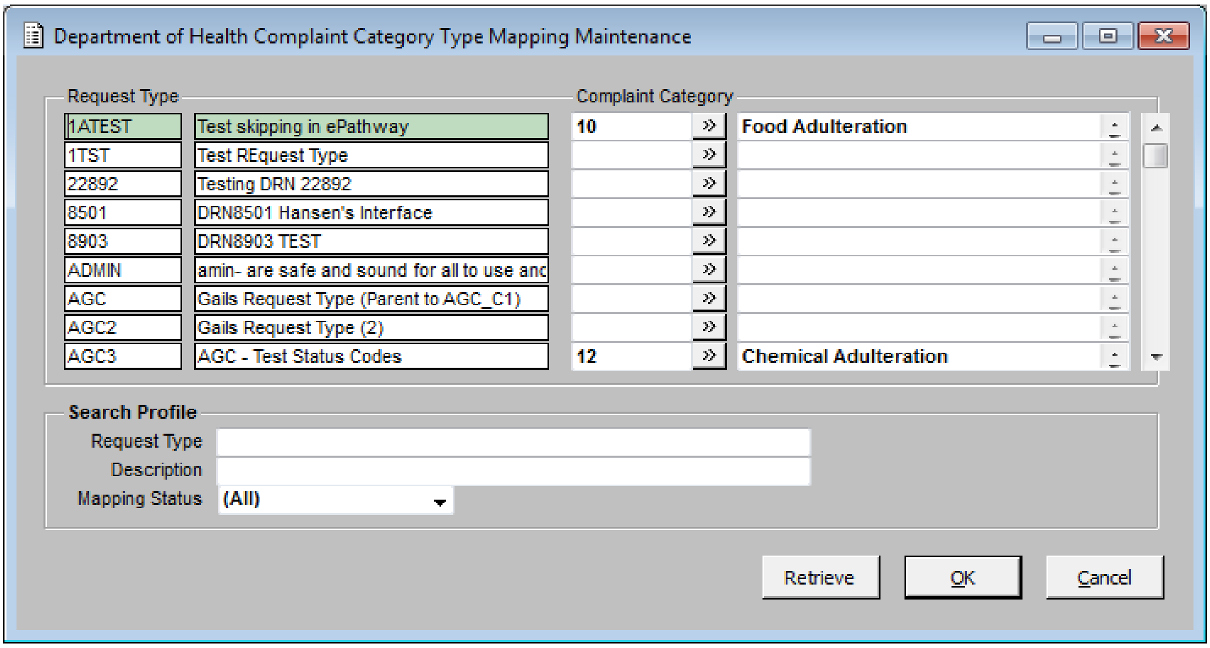
This field is populated with the description of the selected Department of Health Enforcement Type.

Complaint Category Type Mapping Maintenance

The Department of Health Complaint Category Type Mapping Maintenance enables Council to map Complaint Category Types, defined by the Department of Health, with existing Pathway Customer Service Request Types. Where a site does not use Pathway Customer Service this part does not have to be set up. Sites will need to create Complaints via the Complaints Maintenance Section when this part is implemented.

This form enables Councils that utilise the Pathway Customer Service module to record complaints regarding licensed premises, to continue to do so. The mapping between Request Types and Complaint Categories enables the Food Safety reporting process to extract the Complaint Category information that is mapped to a Request Type.

The Search Profile may assist in finding all those that Request Types that match a particular Complaint Category easier using the Type or Description field to search on. This will assist especially where a site may have hundreds of Request Types. If this is started users can then come back at a later date and also filter by those that have not been assigned a Complaint Category by using the Mapping Status filter.



Department of Health Complaint Category Type Mapping Maintenance form

Where a site does not use the Pathway Customer Service Module, set up is not required in this area. Sites will need to use the Complaints Maintenance when this becomes available. If the option is clicked on in error, sites will receive a warning advising that the Module is not active.

Department of Health Complaint Category Type Mapping Maintenance – Request Type

This field contains the Pathway Request Types and descriptions that may be used to link to the Department of Health's Complaint Category

Department of Health Complaint Category Type Mapping Maintenance – Complaint Category

Use the Pop up button to select the appropriate Department of Health Complaint Category.

Department of Health Complaint Category Type Mapping Maintenance – Description

This field displays the Description associated with the Department of Health's Complaint category.

Department of Health Complaint Category Type Mapping Maintenance – Search Profile – Request Type

To assist in selecting a particular request type it is possible to utilitse the standard Pathway search functionality of entering all or part of the code to select the required Request Type.

Department of Health Complaint Category Type Mapping Maintenance – Search Profile – Description

To assist in selecting a particular request type it is possible to utilitse the standard Pathway search functionality of entering all or part of the description to select the required Request Type.

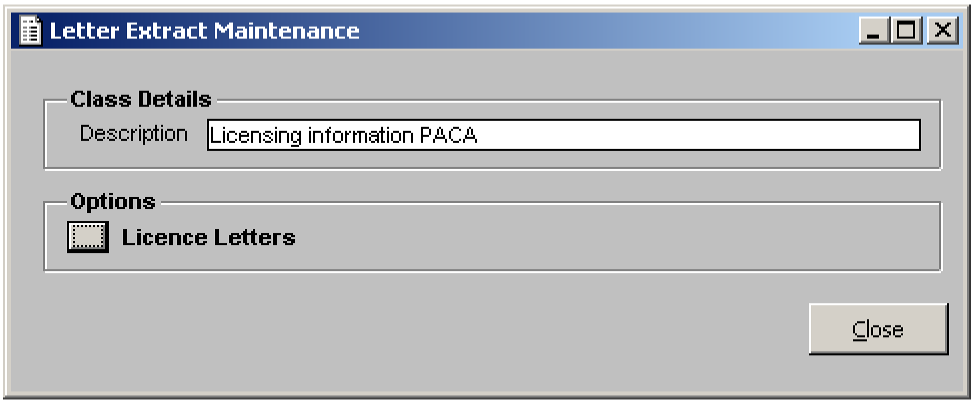
Department of Health Complaint Category Type Mapping Maintenance – Search Profile – Mapping Status

This fiel allows for further filtering of the selection criteria if required. The possible selections here are ALL, ASSIGNED and UNASSIGNED.

Letter Extracts

Letter Extract Maintenance Form

The Letter Extract Maintenance Form allows the selection of Licensing Letters.



Letter Extract Maintenance Form

Class Details – Description
The Description of the Licence Class being maintained is displayed in this field.

Options – Licence Letters
The Licence Letters Option button will display the search profile form to allow entry of a New Extract or maintenance of an existing one.

Extract Code Lists

EXTRACT	FILTER	AVAILABLE FIELDS	EXTRACTED FROM	ASSOCIATED EXTRACT LISTS
AFFPROP Affected Properties	N	«Affected_Property» «Affected_Property_Descr» «Identity» «Identity_Role» «Mailing_Address»	Affected Property Maintenance	
APPFEE Licence Fees	Y	«Fee_Type» «Fee_Description» «Calculated_Fee» «Accepted_Fee» «Accepted_Fee_Tax» «Paid» «Paid_Tax» «Balance» «Refunded» «Status» «Paid_NC» «Bank_Guarantee»	Licence Fee Maintenance	FEETRAN COND

		«Transactions» «Conditions»	
COND Licence Conditions (Associated Extract to ***FEES***)	Y	«App_Cond_Code» «App_Cond_Description» «App_Cond_Apply_Date» «App_Cond_Lapse_Date» «App_Cond_Document» «Document_TPK» «User_Defined_Field_1» «User_Defined_Field_2» «User_Defined_Field_3» «User_Defined_Field_4»	Conditions Maintenance
CONSENTS Licence Consents	Y	«Consent_Type» «Consent_Type_Code» «Consent_Nature» «Consent_Nature_Code» «Lodgement_Date» «Application_Date» «Expiry_Date» «Consent_Comment» «Consent_Required» «Decision_Type» «Decision_Type_Code» «Decision_Date» «Decision_Authority» «Decision_Authority_Code» «Rejection_Reason» «Rejection_Reason_Code» «Under_Appeal» «Decision_Comment» «Responsibility» «Responsibility_Code»	Consents Maintenance
DECISION Licence Decisions (Associated Extract to ***RELAPPL***)	Y	«Approval_Number» «Type» «Date» «Effective_Date» «Authority» «Rejection_Reason» «Under_Appeal» «Description»	Decision Maintenance
DEVCDIMS Development Category Dimensions (Associated Extract to ***MAJMIN***)	N	«Dim_Description» «Dim_Type» «Dim_Value»	Development Category Maintenance
DEVCFEES Development Category Fees (Associated Extract to ***MAJMIN***)	N	«Base_Feer» «ET_Rate» «ET_Factor» «Area» «Charge_Rate» «Dim_Type» «Dim_Description» «Fee_Type» «Fee_Description»	Development Category Maintenance
DISABLE	N	«Date»	

Vehicle Disabiltiy Code History		«Disability_Code» «Narrative»		
FAILED Failed Inspection Result Reasons (only to be used as an Associated Extract to ***INSPECT***)	N	«Failed_Reasons»	Inspection Maintenance	
FEEDB Application Fees where using Pathway Debtors as Accounting Method or requiring to Print Invoice from Fees Maintenance (only to be used as an Associated Extract to ***INVOICE***)	N	«Fee_Code» «Fee_Description» «Line_Number» «Total_Fee_Amount» «Fee_Tax_Amount» «Fee_Net_Amount» «Fee_Taxable_Flag» «Fee_Balance» «Fee_Paid» «Payment_Reference» «Total_Time»	Application Fee Maintenance	
FEETRAN Licence Fee Transaction (only to be used as an Associated Extract to ***FEES, RECEIPTS***)		«Fee_Type» «Fee_Type_Code» «Transaction_Type» «Transaction_Type_Code» «Transaction_Date» «Invoice_Number» «Receipt_Number» «Non_Cash_Number» «Date» «Amount» «Tax» «Comment»	Licence Fee Maintenance	
FOODMODS Food Safety Modules	N	«Module_Code» «Module_Description»		
INSPECT Inspections	Y	«Type» «Area» «Result» «Date» «Time» «Duration» «Number» «Officer» «Officer_Id» «Requestor» «Requestor_Name» «Requestor_Address» «Requestor_Address_1_Line» «Requestor_Comm_1» «Requestor_Comm_2» «Requestor_Comm_3» «Requestor_Info_1» «Requestor_Info_2» «Requestor_Info_3» «Locations» «Template_1» «Template_2» «Template_3»	Inspection Maintenance	NOTES FAILED

		«Template_4» «Template_5» «Template_6» «Notes» «Failed» «Questionnaire_Answers»		
INSPQUES Inspection Questionnaire Answers	Y	«Type» «Area» «Result» «Date» «Time» «Duration» «Number» «Officer» «Officer_Id» «Requestor» «Requestor_Name» «Requestor_Address» «Requestor_Address_1_Line» «Requestor_Comm_1» «Requestor_Comm_2» «Requestor_Comm_3» «Requestor_Info_1» «Requestor_Info_2» «Requestor_Info_3» «Locations» «Template_1» «Template_2» «Template_3» «Template_4» «Template_5» «Template_6» «Notes» «Failed»	Inspection Maintenance	NOTES FAILED
INVOICE Application Fees where using Pathway Debtors as Accounting Method or requiring to Print Invoice from Fees Maintenance	N	«Invoice_Number» «Invoice_Date» «Invoice_Total_Inc_Tax» «Invoice_Total_Exc_Tax» «Invoice_Tax_Total» «Invoice_Fees»	Application Fee Maintenance	FEEDB
LICDIMS Licence Dimensions	Y	«Dimension» «Dimension_Code» «Dimension_Value»	Dimension Maintenance	
LLC_ATT Licence Attachments	Y	«Attachment_File» «Attachment_Description»	Attachments	
LOCATION Licence Locations	N	«Location» «Property_TPK» «Assessment_Number»	Location Maintenance	
MAJMIN Major & Minor Categories	Y	«Major_Categories» «Minor_Categories» «Maj_Cat_Type» «Min_Cat_Type» «Dev_Cat_Dims» «Dev_Cat_Fees»	Major & Minor Development Categories Maintenance	DEVCDIMS DEVCFEES

MISCDATA Miscellaneous Data	Y	«Misc_Data_Type» «Date» «Value»	Miscellaneous Data Maintenance	
NAMES Licence Names/Roles	Y	«Role» «Identity» «Id_Address_Formatted» «Id_Address_1_Line» «Id_Com_1» «Id_Com_2» «Id_Com_3» «Id_Info_1» «Id_Info_2» «Id_Info_3»	Names Maintenance	
NOTES Inspection Notes (only to be used as an Associated Extract to ***INSPECT***)	N	«Date» «Time» «Officer» «Officer_Id» «Note»	Inspection Maintenance	
PREMISES Premises	N	«Premise_Code» «Premise_Description»		
PURP Purpose Code	N	«Purpose_Code» «Purpose_Code_Desc» «Lic_Purc_Document» «Purpose_Comments»		
RECEIPTS Licence Receipts	Y	«Receipt_Number» «Receipt_Date» «Receipt_Amount» «Receipt_Tax» «Recipient_Name» «Recipient_Addr» «Fees»		FEETRAN
REFERENC Licence References	Y	«Reference_Type» «Reference_Description» «Reference_Number» «Status» «Status_Date»	Licence References	
RELAPPL Related Applications	Y	«Application_Number» «Class» «Type» «Application_Description» «Lodgement_Date» «Application_Status» «Application_Decisions»	Related Applications Maintenance	
RELLICN Related Licences	Y	«Application_Date» «Licence_Issue_Date» «Licence_Expiry_Date» «Licence_Number» «Licence_Status» «Licence_Type» «Licence_Entry_Date» «Licence_Description» «Licence_Decision_Date»	Related Licences	

		«Licence_Decision_Number» «Licence_Decision_Type» «Licencee_Name» «Licencee_Address»
VEHICLES Vehicle Details	Y	«Registration_Number» «Date_Cancelled» «Vehicle_Make» «Vehicle_Module» «State» «Area» «Disability_Code» «Comments» «Disable»
PROPOWNERS All Owners of the Affected Property	N	«Owner_Name» «Owner_Address» «Owner_Address_1_Line

Special instructions have been developed to satisfy Council which concatenates all Affected Property Owners into one field. These instruction are for Word 2002 for setup information.

1. Create a new Property Owner Extract
2. From the Tools menu in Word expand the Letters and Mailings option and select Mail Merge Wizard
3. Select Previous: Starting Documents to return to step 2
4. Select Previous: Select Document Type to return to step 1
5. Select a document type of Directory
6. Click on Next: Starting Document
7. Select Use Current Document
8. Click on Next: Select Recipients
9. The document should already be linked to a data source
10. Click on Next: Arrange your Directory
11. At this point abandon the Wizard and perform the following manual steps
12. From the Insert menu select the Fields Option
13. Scroll down the list and select the IF Field
14. Do Not enter any values in the box just click on OK to insert the empty field
15. Highlight “**Error! Missing Test Condition**. right click and select Toggle Field Codes
16. Place the cursor in between the two spaces following the IF inside the field
17. Go to the Insert menu and select the Field option
18. Scroll down the list of fields and select the MERGEREC field
19. Click on OK to insert the field (displays as a 1 after it is inserted)
20. After the MERGEREC field (i.e. the 1) enter a [space] followed by an equals sign followed by another [space] followed by a 1 and another [space]
21. Insert the “Owner_Name” merge field
22. Highlight everything, right click and select Toggle Field Codes
23. After the merge field enter a [space]
24. From the Insert menu slect the fields option
25. Scroll down the list and find the QUOTE field
26. In the Literal Text box type a [space] followed the word and
27. Click on OK to inser the field
28. Highlight the field, right click and select Toggle Field Codes
29. You must type a [space] after the and before the last double quote (i.e. change “ and” to be “ and “)
30. After this last double quote type a [space] and inser the “Owner_Name” merge field
31. When highlighted and toggled the end results look like this

    { IF { MERGEREC * MERGEFORMAT } = 1 { MERGEFIELD "Owner_Name" } { QUOTE " and " { MERGEFIELD "Owner_Name" } * MERGEFORMAT }}

List of Extract Fields

The following summarises the extract fields available for producing Letters.

Extract Fields	Data Extracted From
General Fields	
Doc_Addressee_SalCon	Personal Name Maintenance
Doc_Addressee_Salutation	Personal Name Maintenance
Document_Applicant_Addres	Default Address Maintenance
Document_Applicant_Name	Default Address Maintenance
Document_Completion_Date	Document Request Maintenance
Document_Expiry_Date	Document Request Maintenance
Document_Fee_Amount	Document Request Maintenance
Document_Issue_Date	Document Request Maintenance
Document_Licence Entry_Date	Document Request Maintenance
Document_Number	Document Request Maintenance
Document_Receipt_Date	Document Request Maintenance
Document_Receipt_Number	Document Request Maintenance
Document_Reference_Date	Document Request Maintenance
Document_Reference_Number	Document Request Maintenance
Document_Status	Document Request Maintenance
Merge_Class_Code	Merge Class Maintenance
Merge_Class_Description	Merge Class Maintenance
Merge_Type_Code	Merge Class Maintenance
Merge_Type_Description	Merge Class Maintenance
Affected_Property	Affected Property Maintenance
All_Formatted_Titles	Personal Name Maintenance
All_Locations	Locations Maintenance
All_Prop_Addresses	Locations Maintenance
All_Prop_Descr	Locations Maintenance
Debtor_Address	Debtor Maintenance
Debtor_Chk_Digit	Debtor Maintenance
Debtor_Name	Debtor Maintenance
Debtor_Number	Debtor Maintenance
Invoice_Date	Licence Fee Maintenance
Invoice_Number	Licence Fee Maintenance
Invoice_Tax_Total	Licence Fee Maintenance
Invoice_Total_Exc_Tax	Licence Fee Maintenance
Invoice_Total_Inc_Tax	Licence Fee Maintenance
Payment_Reference	Licence TPK
Licence_Date	Licence Data Maintenance
Licence_Expiry_Date	Licence Data Maintenance
Licence Issue Date	Licence Data Maintenance
Licence_Number	Licence Data Maintenance
Licence_Number_Ref	Licence Data Maintenance

Licence_Status	Licence Data Maintenance
Licence Type	Licence Data Maintenance
Licencee Address	Licence Data Maintenance
Licencee Address 1 Line	Licence Data Maintenance
Balance_Total	Licence Summary
Decision_Appeal	Decision Maintenance
Decision_Authority	Decision Maintenance
Decision Comment	Decision Maintenance
Decision_Date	Decision Maintenance
Decision_Number	Decision Maintenance
Decision_Rejection_Reason	Decision Maintenance
Decision_Type	Decision Maintenance
File_Completed_Date	Licence Data Maintenance
File_Started_Date	Licence Data Maintenance
Primary_Location	Location Maintenance
Primary_Prop_Address	Location Maintenance
Primary_Prop_Descr	Location Maintenance
Primary_Prop_Ward	Location Maintenance
Processing_Group	Licence Data Maintenance
Property_Summary	Location Maintenance
Responsibility_Group	Licence Data Maintenance
Site_Description	Location Maintenance

Module Link fields via Registers

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

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

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

Fee Filter Maintenance Form

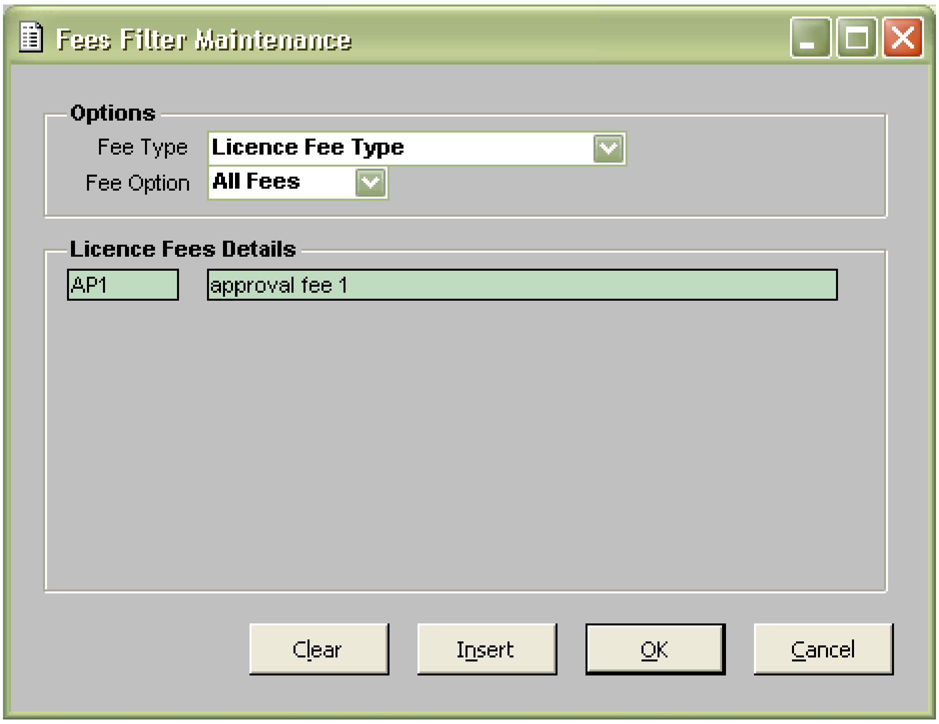
This form is displayed from the Extract Type Maintenance Form when the Extract List Type is FEES – Fees and the Additional Filter button selected.

The Fee Type dropdown list controls which Type of Fees can be extracted and what will be shown on the Pop Up form. For example, selecting the Fee Type of ‘Inspection Fees’ will only allow an Inspection Fee to be selected from the Fee Code Pop Up but if no Fee Code is selected then all Inspection Fees will be extracted. Selecting the Fee Type of ‘All; will allow any Fee to be selected, regardless of Type and if no Fee Code is selected, then all Fees, regardless of Type, will be extracted.

The Fee Code Pop Up is used to filter over a specific Fee Code. Selecting a Fee Code will only extract Fees of that Fee Code.

The Fee Option controls which of the Fees, determined by the Fee Type and / or Fee Code Pop Up, will be extracted. The Fee Option works independently to the other fields. If ‘All Fees’ has been selected, then all the Fees meeting the first two criteria entered will be extracted. If the ‘Latest Fee; is selected, then the latest Fee from the Fees meeting the first two criteria is extracted. If the ‘Outstanding Fees’ option is selected, then only fees which are currently partly or currently unpaid will be extracted.

For an example of the setup and results please refer to information after the screen capture.



Fees Filter Maintenance Form

Licence setup with the following fees

Ln 1	Licence Fee A	5.00
Ln 2	Licence Fee B	15.00
Ln 3	Consent Fee 1	5.50
Ln 4	Consent Fee 2	6.00
Ln 5	Licence Fee A	9.00
Ln 6	Inspection Fee 2	35.60
Ln 7	Inspection Fee 1	10.00

Fees Filter Settings and the results based on the above Application's Fees

Fee Type	Fee Option	Fee Details	Result
All	All Fees	Blank	Ln 1 Licence Fee A 5.00 Ln 2 Licence Fee B 15.00 Ln 3 Consent Fee 1 5.50 Ln 4 Consent Fee 2 6.00 Ln 5 Licence Fee A 9.00 Ln 6 Inspection Fee 2 35.60 Ln 7 Inspection Fee 1 10.00
All	Latest Fee	Blank	Ln 7 Inspection Fee 1 10.00
Licence	All Fees	Blank	Ln 1 Licence Fee A 5.00 Ln 2 Licence Fee B 15.00 Ln 5 Licence Fee A 9.00
Licence	Latest Fee	Blank	Ln 5 Licence Fee A 9.00
Consent	Latest Fee	Blank	Ln 4 Consent Fee 2 6.00
All	All Fees	Licence Fee B & Inspection Fee 2	Ln 2 Licence Fee B 15.00 Ln 6 Inspection Fee 2 35.60
All	Latest Fee	Licence Fee B & Inspection Fee 2	Ln 6 Inspection Fee 2 35.60

Options - Fee Type
Select a Fee Type from the drop down list. The Fee Types available for selection are;

- All
- Licence Fee Type
- Consents Fee Type
- Inspection Fee Type

The Fee Type dropdown list controls which Type of Fees can be extracted and what will be shown on the Pop Up form. For example, selecting the Fee Type of 'Inspection Fees' will only allow an Inspection Fee to be selected from the Fee Code Pop Up but if no Fee Code is selected then all Inspection Fees will be extracted. Selecting the Fee Type of 'All; will allow any Fee to be selected, regardless of Type and if no Fee Code is selected, then all Fees, regardless of Type, will be extracted.

Options – Fee Option
Select which Fees are to be included in the filtering. The Fee Options available for selection are;

- All Fees
- Latest Fee

The Fee Option controls which of the Fees, determined by the Fee Type and / or Fee Code Pop Up, will be extracted. The Fee Option works independently to the other fields. If 'All Fees' has been selected, then all the Fees meeting the first two criteria entered will be extracted. If the 'Latest Fee; is selected, then the latest Fee from the Fees meeting the first two criteria is extracted.

Fee Details
The Fee Details are shown when the Insert Button has been selected and Fees have been selected to be used in the Filter for the Extract.

Clear Button
This button will clear the filter, enabling you to select a new filter type or leave it blank.

Licence Categories

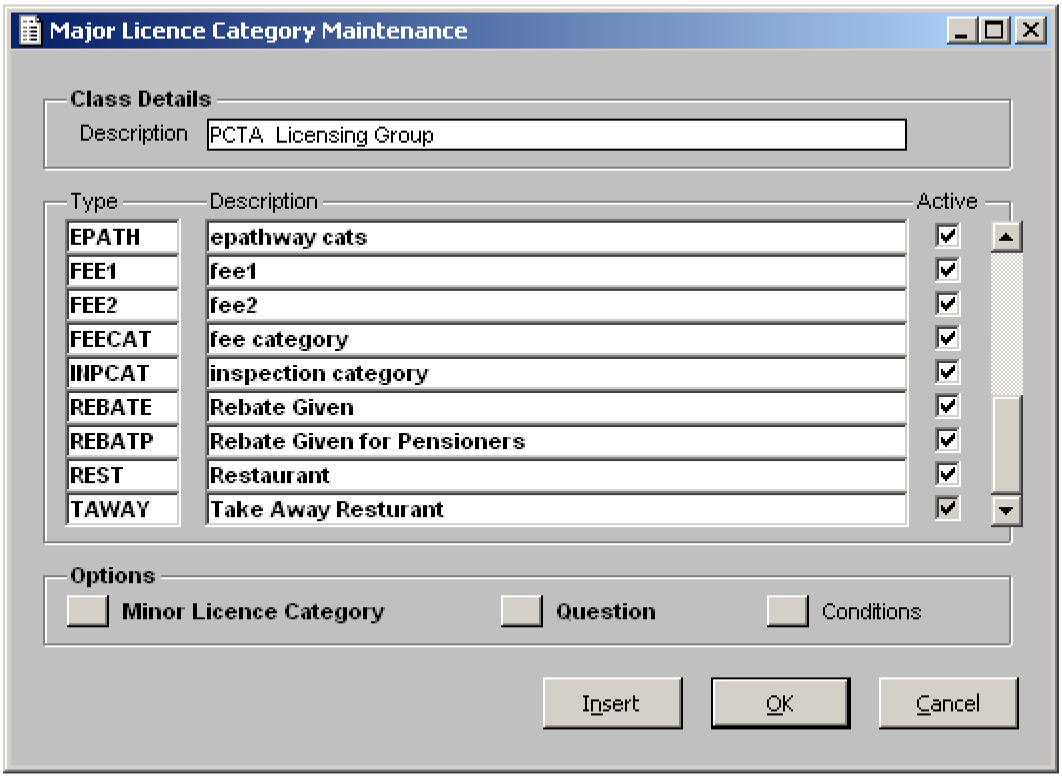
Licence Categories Parameter

This parameter is used to establish various categories that may be applied to a Licence.
The Licence Categories are broken up into Major Categories to which are assigned Minor Categories.
Individual Minor Categories may also have Dimensions associated with them.
This function is optional.

Major Licence Category Maintenance Form

This form allows for the creation and maintenance of Major Licence Categories.

NOTE: - Conditions are also able to be assigned to the Major Licence Category. When these Major Licence Categories are used in Licensing Maintenance, in Licence Entry, Change Licence Type or inserting a new Fee, the assigned Condition will be loaded onto the Licence. The system will check for existing Standard Conditions and these Major Licence Category Conditions will only be loaded once if Standard but will always load if Non Standard. As the Conditions Option is a Secured Option it will only be available for use where the Council is authorised to the function.



Major Licence Category Maintenance Form

Class Details
This field contains the description of the Class of Licence to which you are assigning Major Licence Categories.
This field is display only and may not be maintained.

Type

This field contains the Major Licence Category type code. Up to six alphanumeric characters may be entered.
This field is mandatory.

Description
This field contains the description of the Major Licence Category.
This field is mandatory.

Active
If this box is checked on then the Major Licence Category type is available to the system.

If this box is checked off then the Major Licence Category type is no longer available to the system. Any existing Licences with this Major Licence Category type will remain as entered. The Major Licence Category type will no longer be available for addition to Licences.

Options - Minor Licence Category Button
Pressing this button will display the Minor Licence Category Maintenance form.

Minor Licence Categories are assigned at the individual Major Category level.
Ensure focus is on the appropriate Major Licence Category type prior to pressing this button.

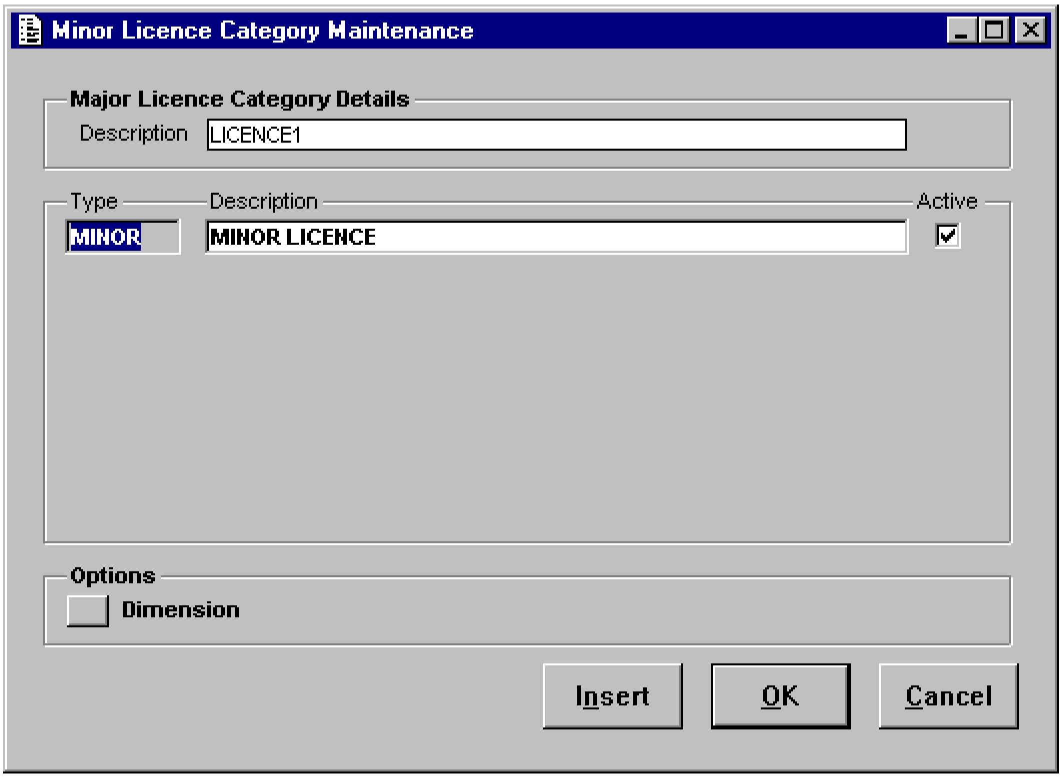
Options - Question
Pressing this button will display any Questions that have been setup for the Major Category. From the Question Maintenance form the User is able to add or modify Questions.

Options - Conditions
Pressing this button will display any Conditions that have been setup for the Major Category

NOTE: - When these Major Licence Categories are used in Licensing Maintenance, in Licence Entry, Change Licence Type or inserting a new Fee, the assigned Condition will be loaded onto the Licence. The system will check for existing Standard Conditions and these Major Licence Category Conditions will only be loaded once if Standard but will always load if Non Standard. As the Conditions Option is a Secured Option it will only be available for use where the Council is authorised to the function.

Minor Licence Category Maintenance Form

This form allows for the creation and maintenance of Minor Licence Categories for a Major Licence Category.



Minor Licence Category Maintenance Form

Major Licence Category Description
This field contains the description of the Major Licence Category to which you are assigning Minor Licence Categories.
This field is display only and may not be maintained.

Type
This field contains the Minor Licence Category type code. Up to six alphanumeric characters may be entered.
This field is mandatory.

Description
This field contains the description of the Minor Licence Category.
This field is mandatory.

Active
If this box is checked on then the Minor Licence Category is available to the system.

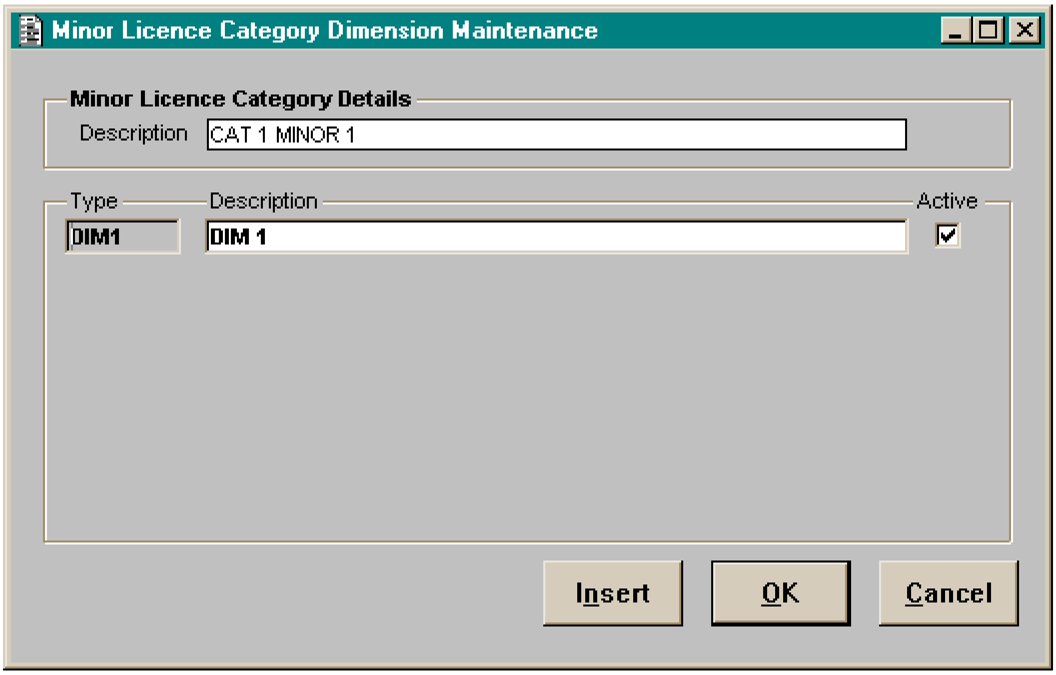
If this box is checked off then the Minor Licence Category is no longer available to the system. Any existing Licences with this Minor Licence Category will remain as entered. The Minor Licence Category will no longer be available for addition to Licences.

Dimension Button
Pressing this button will present the Minor Licence Category Dimension Maintenance Form.

Minor Licence Category Dimensions are assigned at the individual minor category level. Ensure focus is on the correct record prior to pressing this button.
This function is optional.

Minor Licence Category Dimension Maintenance Form

This form allows for the creation and maintenance of Minor Licence Category Dimensions.



Minor Licence Category Dimension Maintenance Form

Minor Licence Category Description
This field contains the description of the Minor Licence Category to which you assign to Major Licence Categories.

Type
This field contains the Minor Licence Category type code. Up to six alphanumeric characters may be entered.
This field is mandatory.

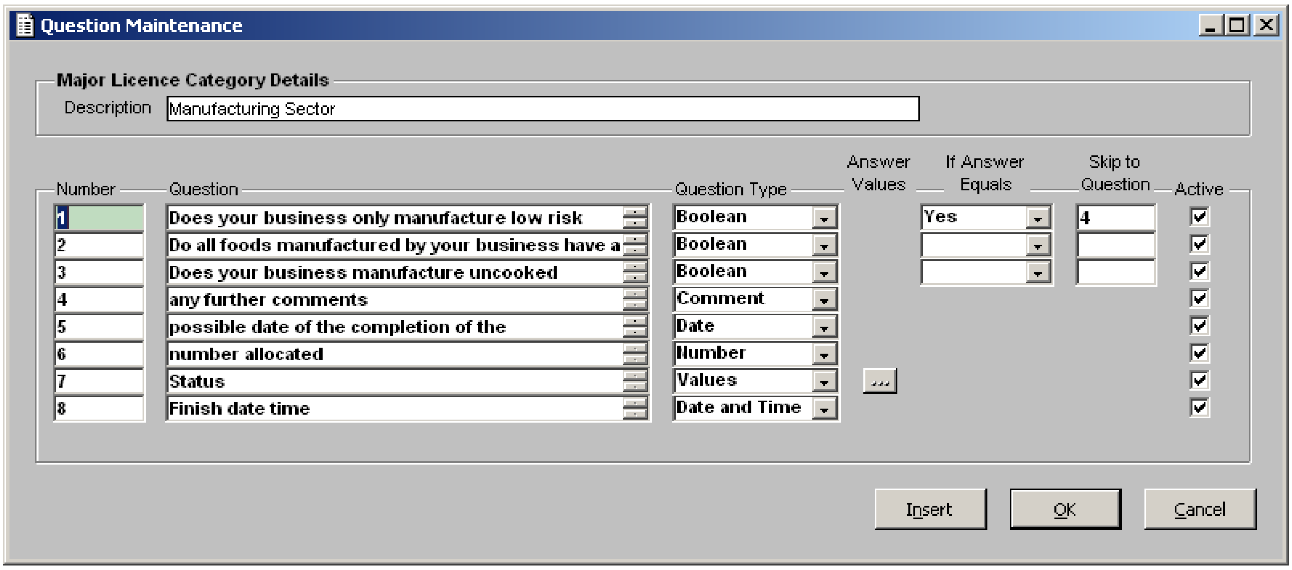
Description
This field contains the description of the Minor Licence Category.
This field is mandatory.

Question Maintenance Form

The Question Maintenance form allows the defining of Questions that can be displayed and updated from within the Licensing Category maintenance within Licence Maintenance menu.

Questions can be set and the Answers defined as to the layout required for the Answer. There are six possible Question Types that can be defined. These are:-

- Boolean – Yes/No check box type questions
- Number – 0 to 9999999
- Comment – unlimited text string
- Single Line – 50 character text string
- Date – select a date from the calendar
- Value – user defined coded answer values
- Date and Time – select a date and time from the calendar



Question Maintenance Form

Major Licence Category Details - Description
This field contains the description of the Major Licence Category to which Minor Licence Categories can be assigned.
This field is display only and may not be maintained.

Number
The Number field is used to enter in the Question Number. This is then used to sequence the display of the Questions. This is a mandatory field.

Question
The Question field is where the actual Question is entered. This field is a multi lined entry field and therefore is able to have many lines of text entered into it. This is a mandatory field.

Question Type
Upon creating a Question the Question Type field is blank. The User can use the Dropdown to display a list of valid entries for this field. This is a mandatory field. The options available from the Dropdown are:-

- Boolean (for Yes /No type answers)
- Comment (freeform text field for answer to be entered into)
- Single Line (freefrom 50 character text field)
- Date (entry of a Date is required as the answer)
- Number (entry of a Number is required as the answer)
- Value – (user defined coded answer values)
- Date and Time – (entry of a Date and Time is required as the answer)

<u>Boolean Type Questions</u>
When using Boolean Type Questions it is possible to nominate a Question to Skip To depending on the answer. To enter the scenario 'If the Answer to Question 2 is YES skip to Question 5" the User would check on the If Answer Equals 'YES' dropdown at Question 2 and then enter 5 in the skip to field.

NOTE: It is not possible to Skip to a previous Question and hence loop through Questions again. The Skip To Question Number must be greater than the current Question Number.

<u>Value Type Questions</u>
When using Value Type Questions it is necessary to define the Answers. This is done by selecting the Detail Button that appears after the Question Type field has been set to Value.

Answer Values
When using Value Type Questions it is necessary to define the Answers. This is done by selecting this Detail Button that appears after the Question Type Field has been set to Value.

If Answer Equals

This field is used for Yes/No Answers and can also be used to incorporate the Skip To function.

When using Boolean Type Questions it is possible to nominate a Question to Skip To depending on the answer. The dropdown has the options of ‘Yes’, ‘No’ or ‘Undecided’.

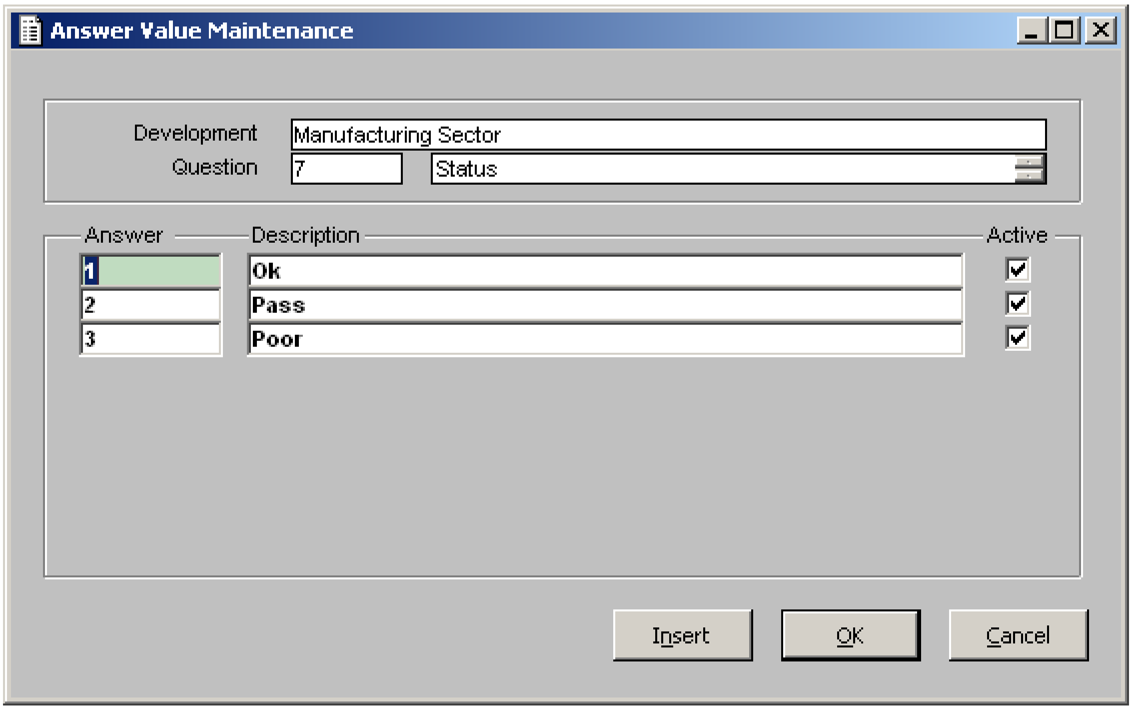
To enter the scenario ‘If the Answer to Question 2 is YES skip to Question 5” the User would check on the If Answer Equals ‘YES’ dropdown at Question 2 and then enter 5 in the skip to field.

Skip To Question
When using Boolean Type Questions it is possible to nominate a Question to Skip To depending on the answer. The Number of the Question to Skip To is entered into this field.

Active
The Active flag is automatically flagged on when a Question is entered into the form. This can be flagged off is the Question is no longer relevant or required.

Answer Value Maintenance Form

The Answer Value Maintenance form is displayed when the Detail Option is taken for a Question that has been defined as a Question Type of Values. This allows the user to enter in the values that are able to be used when answering the question.



Answer Value Maintenance Form

Development Category Details - Description
This field contains the description of the Development Category to which the Question Values are being defined for.

Question
The Question field displays the Question Number and the actual Question that the Answer Values are being defined for.

Answer / Description
The Answer Code and Description for the Question can be entered into these fields. Once entered the Answer Values are then available for use when the User is answering the Question withing Development Category maintenance on the Application.

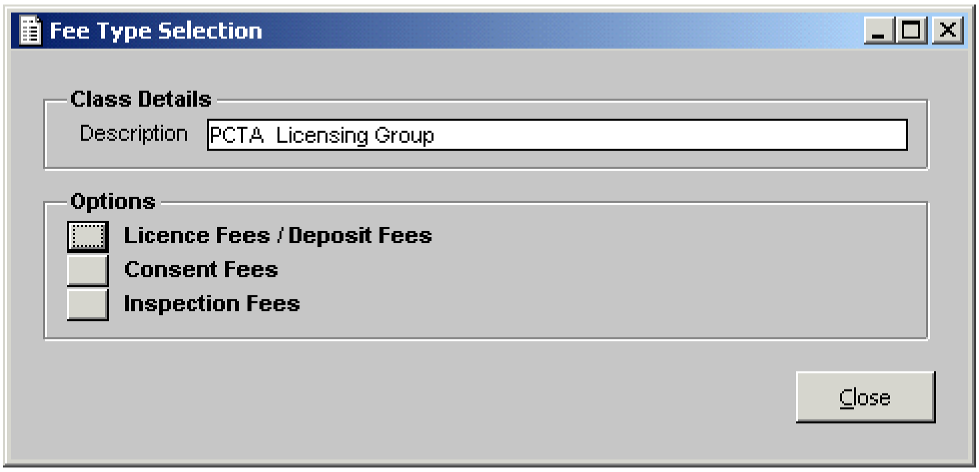
The Active Flag is used to signify that the particular Answer Value is available for use. If no longer required the Active flag can be flagged off thus stopping the further selection of the field.

Licence Fees

Licence Fee Parameters are designed to allow the pre-entry of all fees that may be used when processing Licensing.

Fee Type Selection Form

The Fee Type Selection Form allows the selection of the types of Fees that are to be used. The Options available are Licence Fees, Consent Fees and Inspection Fees. As Fees are created in each Option the Option will become bolded. If Consents and or Inspections have not been assigned for the Licence Type then these Options will be available for entry of Consent Fees or Inspection Fees.



Fee Type Selection Form

Class Details – Description
This field displays the description of the particular Class selected. The Description field is display only and may not be maintained.

Options – Fees
Selecting the Fees Button displays the Licence Fee Maintenance Form.

Options – Consent Fees
Selecting the Consent Fees Button displays the Consent Fee Maintenance Form. If Consents have not been assigned for the Licence Type then this Option cannot be selected or maintained.

Options – Inspection Fees
Selecting the Inspection Fees Button displays the Inspection Fee Maintenance Form. If Inspections have not been assigned for the Licence Type then this Option cannot be selected or maintained.

Licence Fee Maintenance Form

For a Fee flagged as pro-rata and discounted, the following steps are used to calculate the final Fee Amount:

1. Calculate Fee (using dimensions etc)
2. Apply Discount percentage
3. Apply Pro-rata percentage

For example,

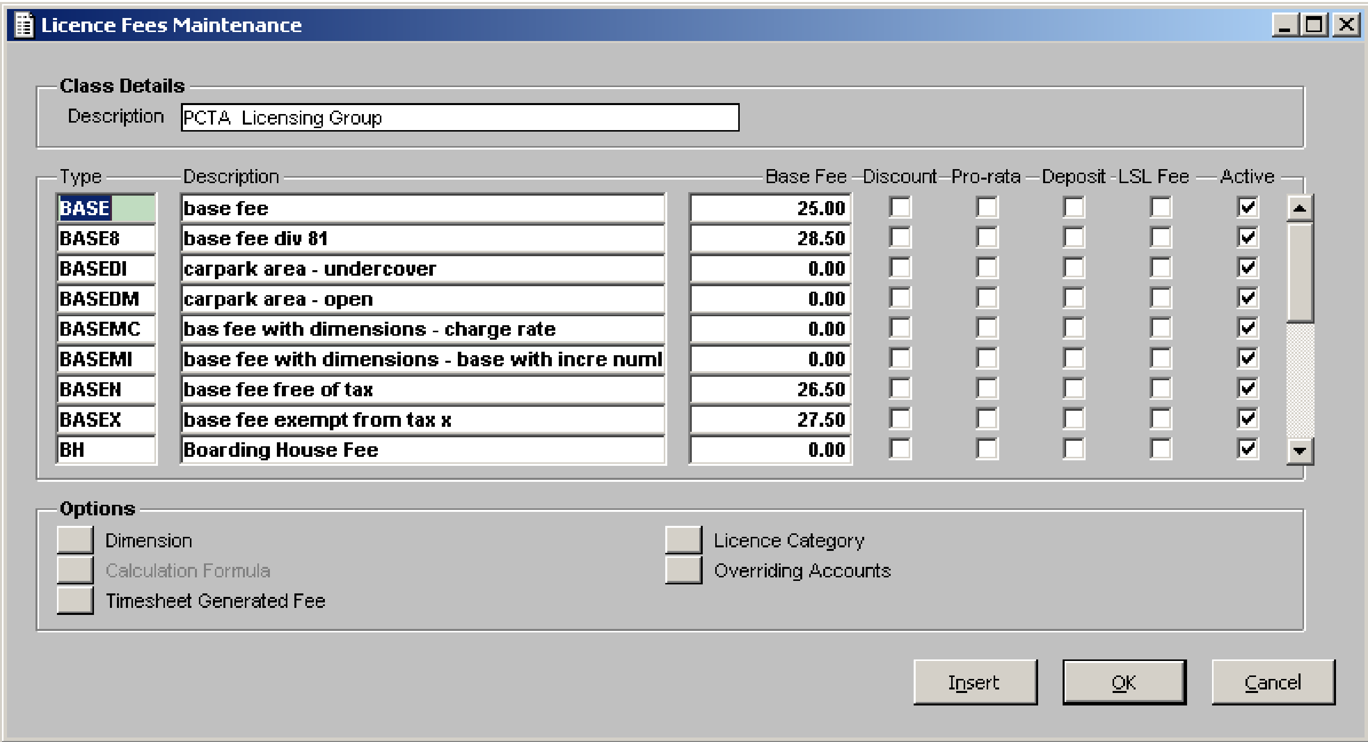
If a Fee would normally total $100.00 and it is flagged as Discounted (by 25%) and pro-rata applied (at 50%), then the final amount will be:

$100.00 at 25% discount =$75.00
$75.00 at 50% prorata =$37.50

This would then display the value of the Fee payable within the standard transaction fields and the Users could then detail out to see how the fees were calculated as they are able to do so no.

If the Accounting Method in the Class Parameters has been set to use Pathway Debtors then the Licence Fees will be updated into the Debtors Module as Debt Types. The Debt Type records within Debtors are non maintainable and will show a Source of Pathway Licensing.

For details of how these Debtor Parameters are created refer to the documentation following the Form Capture.



Fees Maintenance Form

<u>Pathway Debtor Accounting Method</u>
Where Pathway Debtors has been defined as either the Default of Override Option for the Accounting Method a link has to be established between a Fee and A Debt Type.

When **New** Fees are added to this form and accepted the following are created within Debtors:

Debt Type

- A Debt Type Code using the Fee Code will be created in Debtors Module This Debt Type Code must be unique across Classes and Modules therefore the following validation is done on the creation of the Debt Type
  - The Module Code is appended to the Fee Code and re-validated
  - If still not unique then a numeric value of 1 thru to 9 will be appended
  - If still not unique then the TPK (internal primary key) of the Fee Code is appended to the Fee Code
- Application Type is set to ‘Debtors’
- Internal Creation Indicator is set ‘On’
- Category Code is set to that in the Class Parameters
- Internal Description is set to ‘Fee Code Description followed by Module and Class Code’
- External Description is set ‘Fee Code Description’

- Calculation Method is set to Fixed Charge
- Taxable Flag is set to that on the Fee code
- Tax Code is set to that on the Fee code when Taxable = ‘Y’
- Non Taxable Type is set to that on the Fee code when Taxable = ‘N’
- Inclusive/Exclusive is set to that on the Fee code

Debt Type/Transaction Type

- The Debt Type Code created above and the Invoice Transaction Type defined within the Class Parameters are used and the Revenue, Bank and Control Accounts are applied
- The Debt Type Code created above and the Credit Note Transaction Type defined within the Class Parameters are used and the Revenue and Debt Control Accounts only are applied
- No entries are created for Refunds

Rating Period / Debt Type Record

- The Debt Type Code created above and the current Rating Period as defined on the Rates System Parameters are used

When **Existing** Fees are modified the update to the linked Debt Type within Debtors is applied for the following Fee Changes:

- Fee Code
- Fee Code Description
- Any of the Tax Settings
- Any of the Account Settings
- Active Flag

Note that if the Fee code is modified and there is no existing Debt Type relationship the update to the Fee Code will in fact create a Debt Type and link as per the ‘New” Fee process.

When **Deleting** Fees the following areas within Debtors are maintained:

- The Debt Type / Transaction Type is deleted
- The Rating Period / Debt Type is deleted
- The Debt Type is deleted

Class Details

This field displays the particular Class selected.

Type

This field displays the Code given to each Licence Fee.

Description

This field is a detailed Description of the Licence Type.

Base Fee

This field may display the dollar value that can be attached to a Licence as the very first value to be charged. This may also be the only value charged, or the User may wish to add a dimension to a fee rather than adding a Base Fee.

Discount

When this box is checked on for the appropriate fee then the discount amount set up at the Application Fee Accounts Maintenance parameter level will be applied to the fee.

Pro-Rata

When this box is checked on for the appropriate fee then the Pro-Rata amount set up at the System Parameter Maintenance level - Pro-Rata option - will be applied to the fee.

Under the Edit menu Option, there are two menu options called ‘All Pro Rata ON’ and ‘All Pro-Rata OFF’. Using these menu options will either turn all the pro-rata flags on or off. Individual fees can then be maintained by the User.

Deposit

Check this box if the Licence Fee is to be used as a Deposit Fee.

LSL Fee
The LSL Fee check box is used to identify the Fee that is the Long Service Levy Fee to be used in the Long Service Levy process.

Where a Fee is flagged on in the LSL Fee field then when the User adds this fee to the Licence a Pay Type field is displayed on the form.

Note that the Long Service Levy Fee is not GST applicable and therefore the overriding account option should be accessed and set those fees to GST Free.

Active
This field if check will allow this Licence Fee to be accessed. If this field is not checked, then this Licence Fee cannot be selected.

Options

The Options section allows for further information to be added against each Licence Fee. Each of these Options is detailed below.

Dimensions Button
This button accesses the Dimension Maintenance Form.

Overriding Accounts Button
This button accesses the Overriding Accounts Maintenance Form

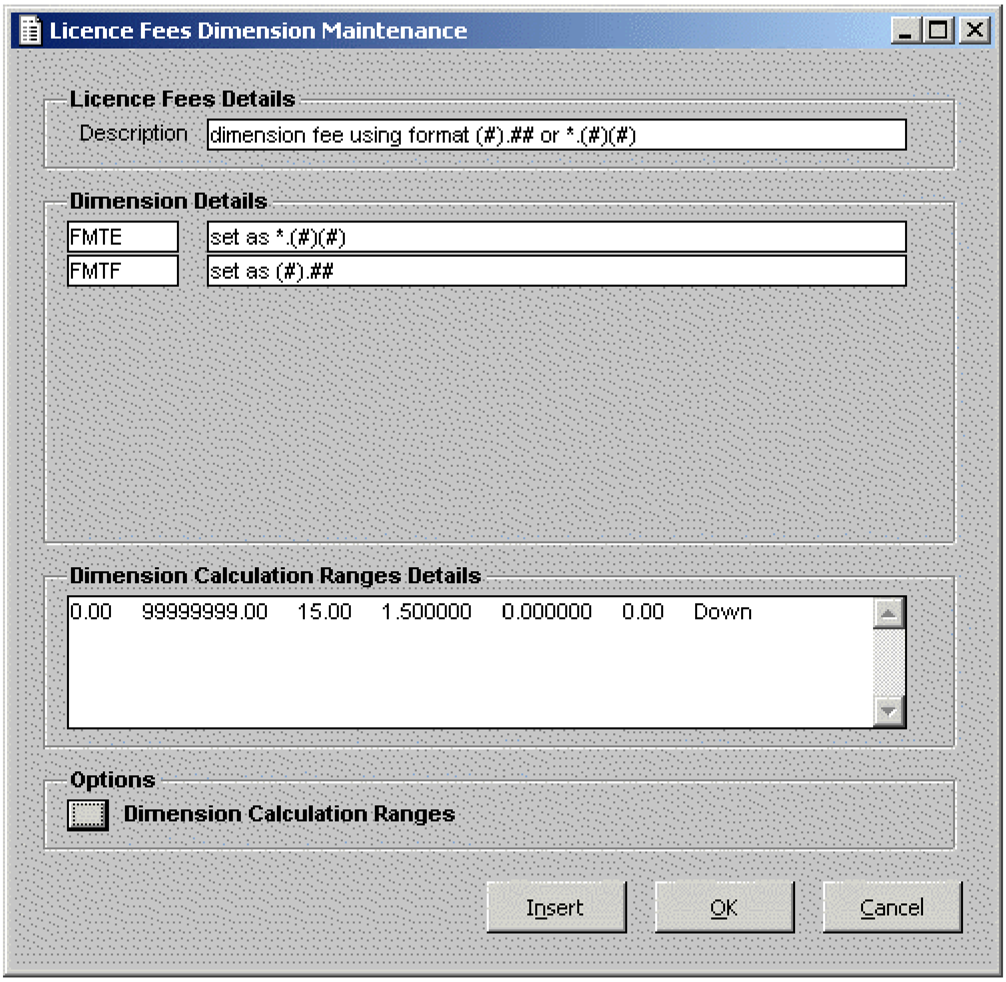
Calculation Formula Button
This button accesses the Calculation Formula Maintenance Form.

Licence Category Button
This button accesses the Major Licence Category Search Profile Form.

Timesheet Generated Fee
Selecting the Timesheet Generated Fee Option Button displays the Timesheet Fee Maintenance form where the User is able to define that the Fee currently in focus is to be used for Timesheet Entry and whether it has Minimum Fee amount.

Licence Fees Dimension Maintenance Form

If Licence Fees are to be calculated based on Dimensions then this form allows for the creation of the required calculation.



Licence Fees Dimension Maintenance Form

Licence Fee Details - Description
This field describes the actual Licence Fee that details are to be added to.

Dimension Details
This field describes the Dimension Details that are to be used for the Calculations. More than one Dimension Type can be used in this form. As the User focuses on each Dimension the Calculation information will be displayed in the Dimension Calculation Ranges Details section of the form.

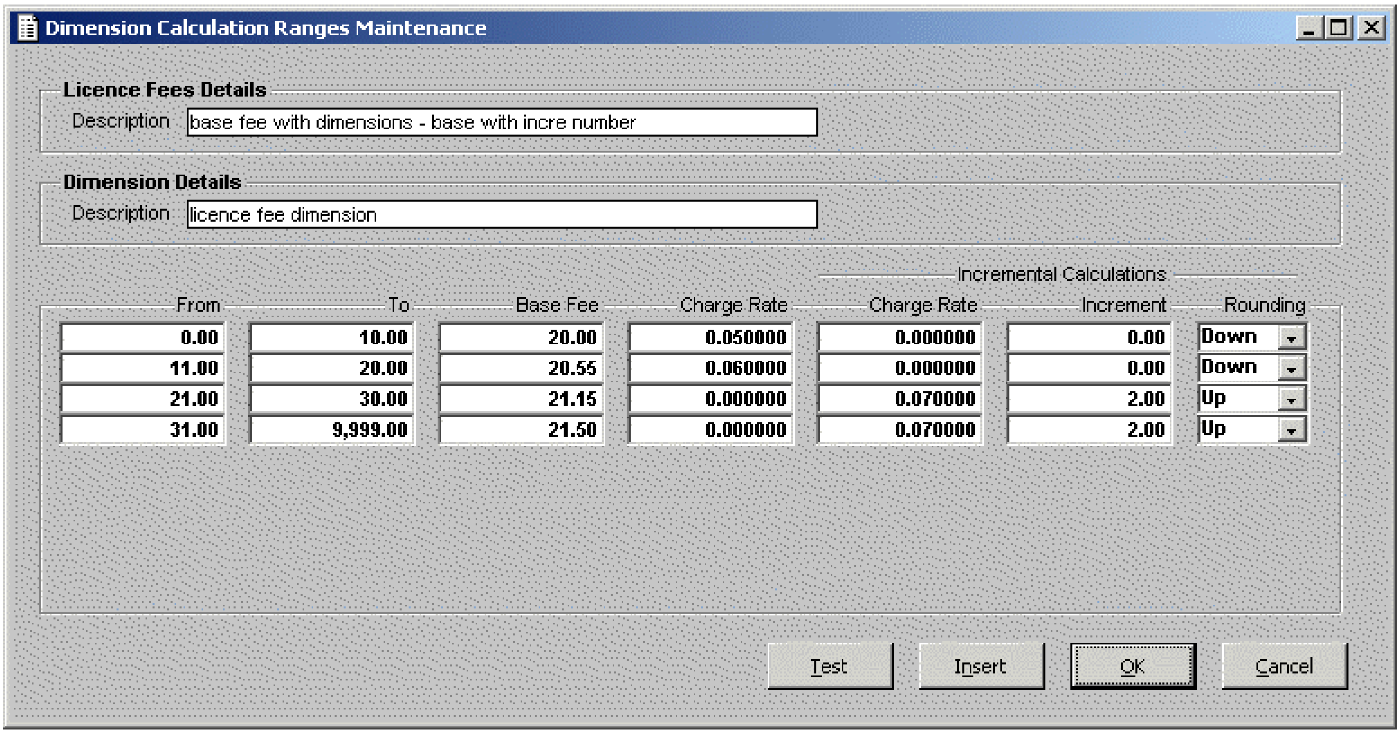
Dimension Calculation Ranges Details
As the User focuses on each Dimension Type the Calculation information will be displayed in this field.

Options – Dimension Calculation Ranges
Selectin the Dimension Calculation Ranges Option will display the Dimensions Calculation Ranges Maintenance Form were the calculation information can be updated.

Dimensions Calculation Ranges Maintenance Form

This form is specific to each Licence Fee, as some may have Dimensions attached to the fee, whilst others may only have a Base Fee. Each Field is detailed below.

Dimensions can be added in scales, each with its own ‘From’ and ‘To’ Fields. Base Fees can be added to each Dimension and a Charge Rate by each scale will escalate the cost accordingly. Refer to the Example text below this form for an idea of how the Base Fee and Charge Rate are used together or the Base Fee and the Incremental Calculation fields are used together.



Dimension Calculation Ranges Maintenance

Licence Fees Details

Description: base fee with dimensions - base with incre number

Dimension Details

Description: licence fee dimension

From	To	Base Fee	Charge Rate	Incremental Calculations Charge Rate	Increment	Rounding
0.00	10.00	20.00	0.050000	0.000000	0.00	Down
11.00	20.00	20.55	0.060000	0.000000	0.00	Down
21.00	30.00	21.15	0.000000	0.070000	2.00	Up
31.00	9,999.00	21.50	0.000000	0.070000	2.00	Up

Test Insert OK Cancel

Dimension Calculation Ranges Maintenance Form
Example using the data in the above form

Licensing Fees
Calculations can consist of the following criteria

- A base fee
- Based on a dimension (eg floor area) in which case the following additional information be recorded
  - Nominated ranges for the dimension
  - A standard charge rate for each amount within a range
  - An incrementail charge rate for nominated increments within a range, rounded up or down

Using the above information on the form the following examples the calculations

Floor Area	Base Fee	Calculation	Fee Amount
10	20.00	10 x 0.05	20.50
15	20.55	4 x 0.06 (where 4 is the difference between the Nominated Floor Area ‘15’ and the From value of the Range the Area falls into ‘11’)	20.79
25	21.15	2 x 0.07 (where 2 is the number of increments between the Nominated Floor Area ‘25’ and the From value of the Range the Area falls into ‘20’, rounded up)	21.29
36	21.50	3 x 0.07 (where 3 is the number of increments between the Nominated Floor Area ‘36’ and the From value of the Range the Area falls into ‘31’, rounded up eg: number of increments of 2 to get between 31 to 36 = 2.5 rounded up = 3)	21.71

Licence Fee Details - Description

This field describes the actual Licence Fee that details are to be added to.

Dimension Details - Description

This field details the actual Dimension that will be used to calculate the dollar value to be charged to the Licence if this fee is used.

The Dimension is then broken down further by the following fields.

Dimensions can be added in scales, each with its own From and To Fields. Base Fees can be added to each dimension and a Charge rate by each scale will escalate the cost accordingly.

Calculation Details - From
The 'From' field is used to define the starting point for the range that is to be calculated. The value entered in the 'To' field is also used in conjunction with the 'From' field.

An example of a 'From' value in conjunction with a 'To' value is:

0.000 10.00
11.00 20.00

Where '0.000' and '11.00' represent 'From' starting points.

Calculation Details - To
The 'To' field is used to define the finishing point for the range that is to be calculated. The value entered in the 'From' field is also used in conjunction with the 'To' field.

An example of a 'From' value in conjunction with a 'To' value is:

0.000 10.00
11.00 20.00

Where '10.00' and '20.00' represent 'To' finishing points.

Calculation Details – Base Fee
The Base Fee is the value that is to be charged for the nominated 'From' and 'To' range. The Base Fee can be different for each range.

Calculation Details – Charge Rate
If there is an entry in the Charge Rate field then the Incremental Calculations field should not be used.

If there is a requirement to use the Incremental Calculations then this Charge Rate field is not used. The process will use one or the other but not a combination of both within the same range.

Incremental Calculations – Charge Rate
Incremental Calculations may also be used to further define how Fees can be calculated by increments within a range. These can be rounded up or down.

If the Incremental Calculaton fields are to be used then the Calculation Charge Rate field should not be used. The process will use one or the other but not a combination of both within the same range.

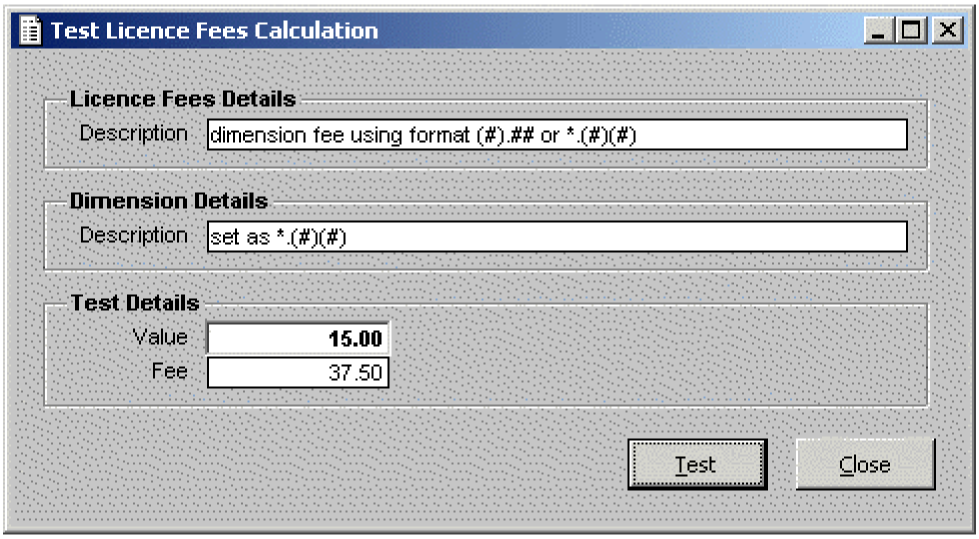
Incremental Calculations - Increment
The Increment field is used in conjunction with the Incremental Charge Rate field to calculate the fee. Based on the Increment value entered here determines the number of times to multiply the Charge Rate value.

Incremental Calculations - Rounding
The Rounding field is used in conjunction with the Incremental Charge Rate and Increment fields. This determines whether the calculated amount is either Rounded Up or Down.

Test Fee Calculation Option
Selecting the Test Button will display the Test Fee Calculation Form where the User is able to enter in a value and have the system calculate out the amount that will be changed for the fee.

Test Licence Fee Calculation Form

The Test Licence Fee Calculation Form may be used to actually Test a Fee Calculation.



Test Licence Fees Calculation Form

Licence Fee Details - Description
The Licence Fee Details section shows the Licence Fee that is being Tested.

Dimension Details - Description
The Description of the Dimension is shown in this field.

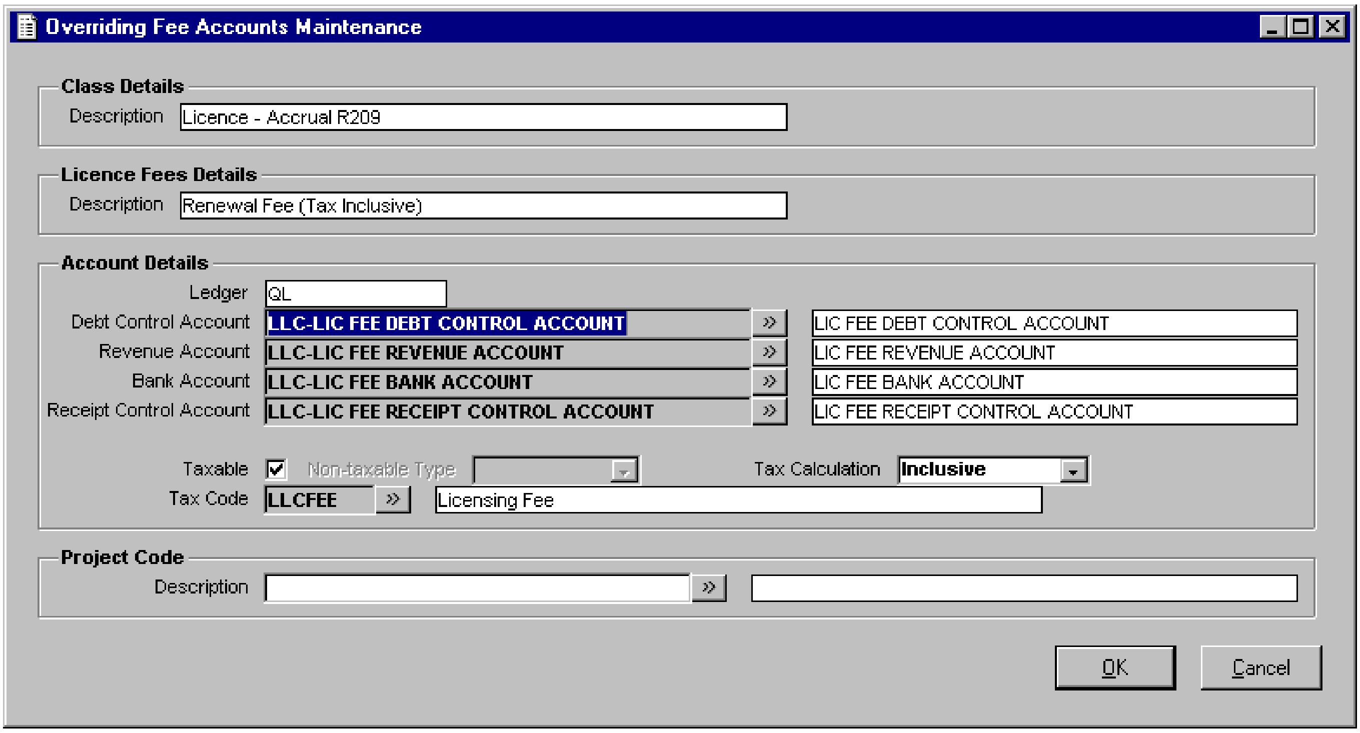
Test Details - Value
The Value field is used to enter in a figure so that when the Test Option is selected the amount of the Fee will be shown in the Fee field. This Fee amount has been calculated based on the Value that has been entered here.

Test Details - Fee
Once a value has been entered and the Test Option has been selected then the calculated Fee amount is displayed in this field.

Test Button
Once a value has been entered and this Option has been selected then the calculated Fee amount will be displayed in the Fee field.

Overriding Accounts Maintenance Form

The Overriding Accounts Licence Maintenance Form is designed to allow Specific Accounts for a particular Fee to be entered. These Accounts bypass the Standard Accounts Setup for Licence Fees.



Overriding Accounts Maintenance Form

Class Details - Description
This field details the Licence Class selected.

Licence Fee Details
This field details the actual Fee that the Overriding Accounts are being Setup for.

Taxable
If this field is checked on then the Class will be Taxable. The Tax Code is entered in the next field.

Non-Taxable Type

If the Taxable field has not been flagged on, therefore making it Non Taxable, then a Non-taxable Type needs to be defined. There are 3 options available in the dropdown list. These are as follows:

- GST Free
- GST Exempt
- Division 81
- Input Tax
- Out of Scope
- Export Sales
- Undefined.

It is expected that Australian sites will use GST Free and Division 81 only. Financial systems can use these values, as the applicable codes, below, are output in the Pathway Financial Transaction File in place of the previous 'N' value.

- N - GST Free
- X - GST Exempt
- 8 - Division 8
- I – Input Tax
- O – Out of Scope
- E – Export Sales
- Z - Undefined

Tax Calculation
This field allows the following options:
- Inclusive

- Exclusive

The selected option determines whether tax will be calculated using the inclusive or exclusive tax calculation method.

Account Details - Ledger
This field will detail the Actual Ledger that is to store the relevant Account information for this Fee.

Bank Accounts

The Debt Control Account Field is used to enter the Account Number that the Fee will be debited to. The Account code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

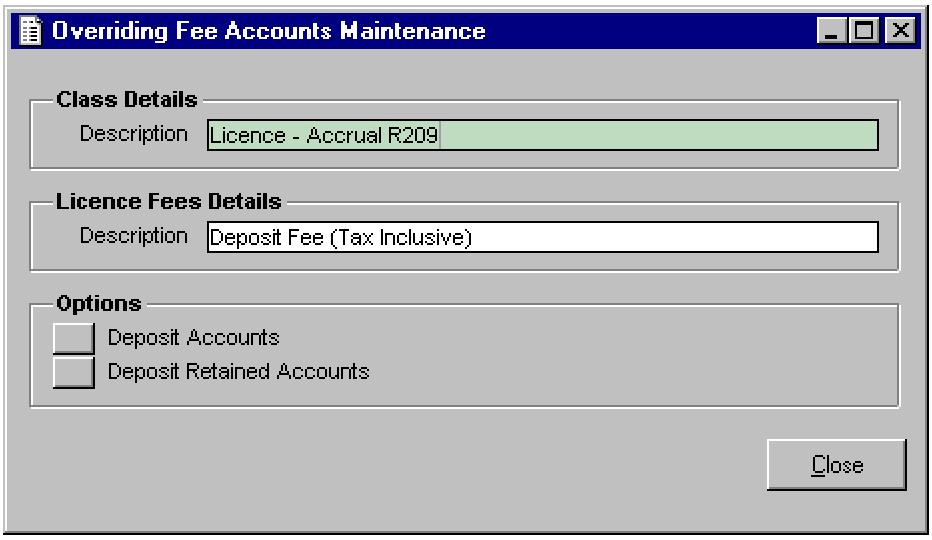
The Revenue Account Field is used to enter the Account Number that the Fee will be credited to. The Account code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

The Bank Account Field is used to enter the Account Number that the Receipt will be debited to. The Account code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

The Receipt Control Account Field is used to enter the Account Number that the Receipt will be credited against. The Account code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

The Refunds Clearing field contains the ledger account to which all Refund transactions will be posted. The Field consists of 3 parts, an Account Number, Pop Up Button and the Account Description. The Pop Button for this and other Accounts detail out to the Financial Account Pop Up Form for Account Selection.

Overriding Fee Accounts Maintenance Form



Overriding Fee Accounts Maintenance Form

Class Details – Description
This field displays the particular Class selected.

This field is display only and cannot be maintained.

Licence Fee Details – Description
This field displays the particular Licence Fee Description.

This field is display only and cannot be maintained.

Options – Deposit Accounts

Selecting the Deposit Accounts Button displays the Overriding Fee Deposit Accounts Maintenance Form.

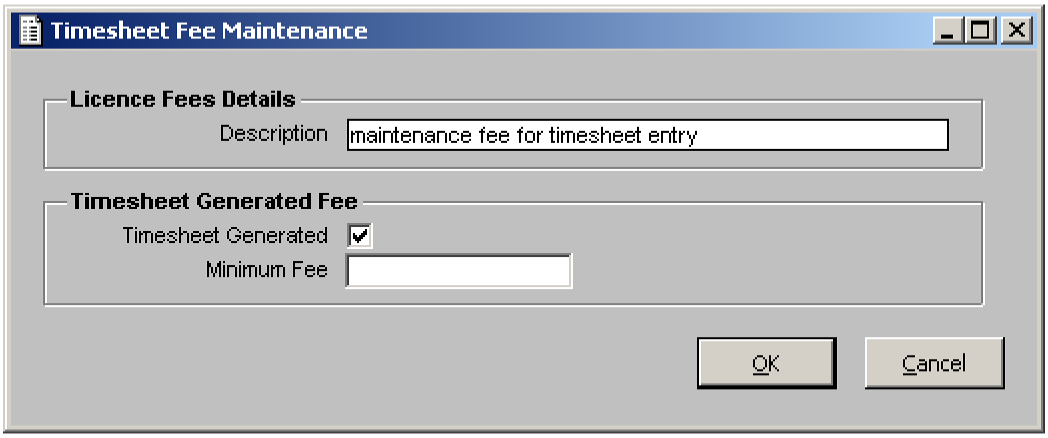
Options - Deposit Retained Accounts
Selecting the Deposit Retained Accounts Button displays the Overriding Fee Deposit Accounts Maintenance Form.

Timesheet Fee Maintenance Form

Where a Fee has been inserted and the Timesheet Option selected the Timesheet Fee Maintenance Form is displayed.

Once the Timesheet Generated option is flagged on then the Fee becomes available for selection within the Workflow Action Parameters. When the Fee is linked to the Task, Timesheet entries can be generated within the application/licence and then upon completion of the Task the Fee will be automatically added to the Application/Licence balance.

NOTE: Timesheet Fees should not be used with Fees that have Dimensions or Development Categories linked.



Timesheet Fee Maintenance Form

Licence Fee Details - Description
This field displays a description of the Licence Fee selected.

Timesheet Generated Fee – Timesheet Generated
Upon entry to this form the Timesheet Generated flag is 'On'. This will then allow entry of a Minimum Fee if required for the Timesheet Fee.

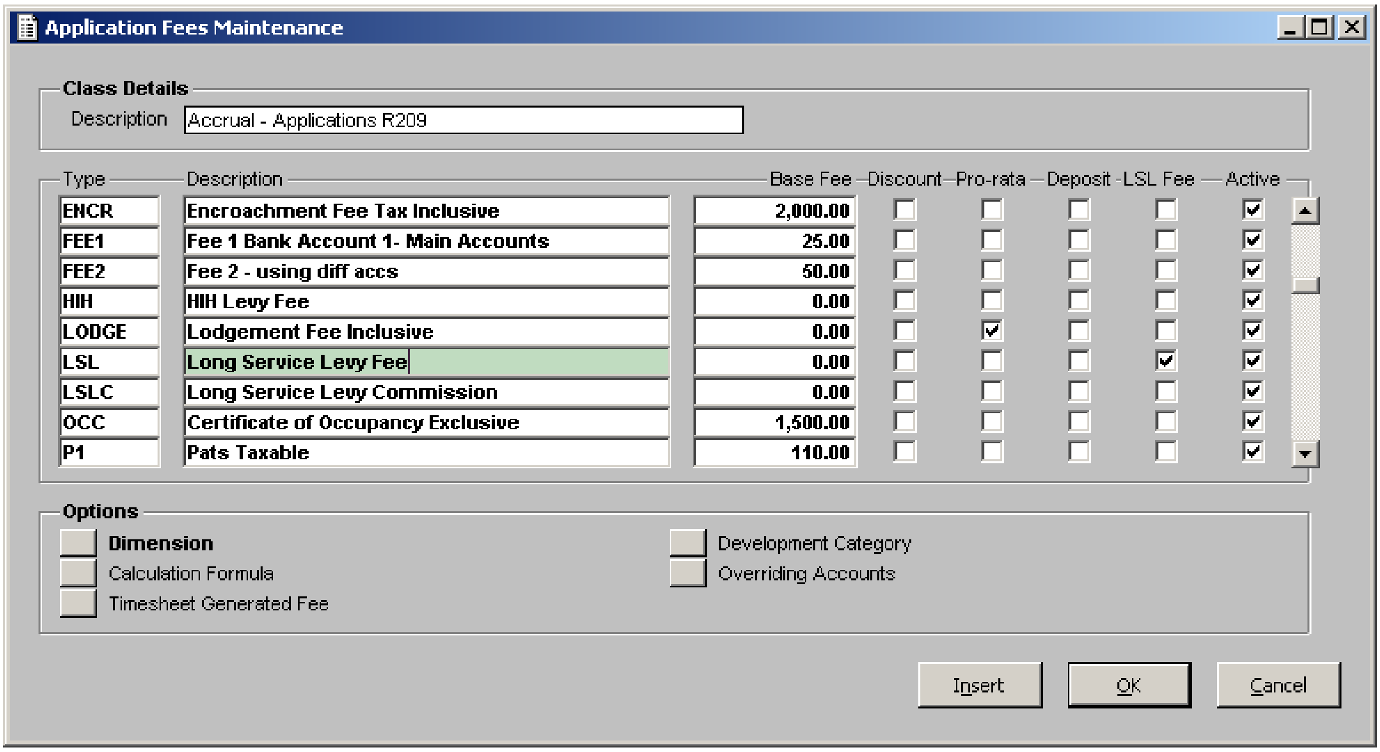
Timesheet Generated Fee – Minimum Fee
The Minimum Fee field is only available for entry if the Generated flag is 'On' otherwise the field is dimmed. If a Minimum Fee amount is to be generated for the Timesheet entry then this is where the Minimum Amount would be entered. When Timesheet entry is performed then the the calculated figure is compared to this Minimum Amount and if the calculated amount is less then the Minimum Fee is applied.

Long Service Levy Fees Form

The ability to produce a Report and Extract Files to Planning New South Wales for Plan First Fees and to The Building and Construction Long Service Levy Payments Corporation for Long Service Levy Fees can be defined the following way.

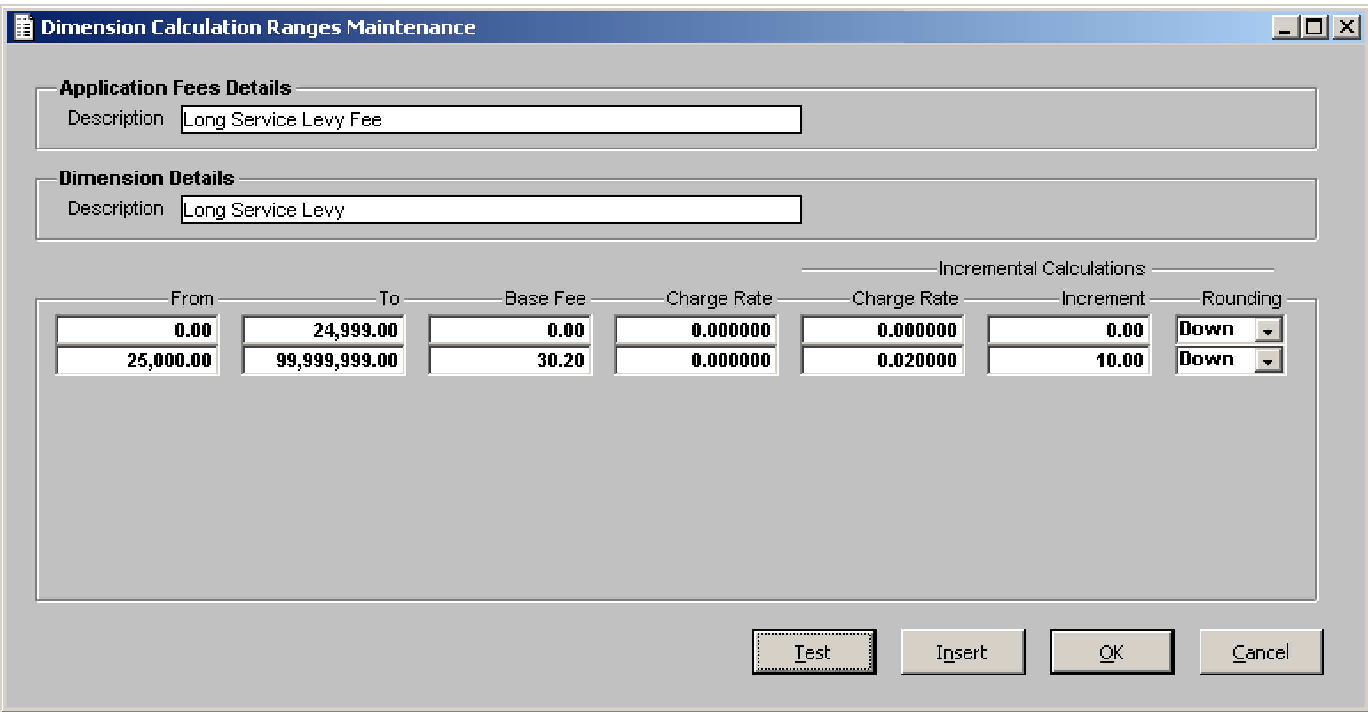
Long Service Levy Fees
As GST is only applicable on the Agents Fee and not the original Levy Fee two separate fees are required to be defined with the Long Service Levy Fee being ticked under the LSL Fee field.

Where the Flag is checked on when the User actually adds this fee to the Application, a Pay Type is displayed on the form.

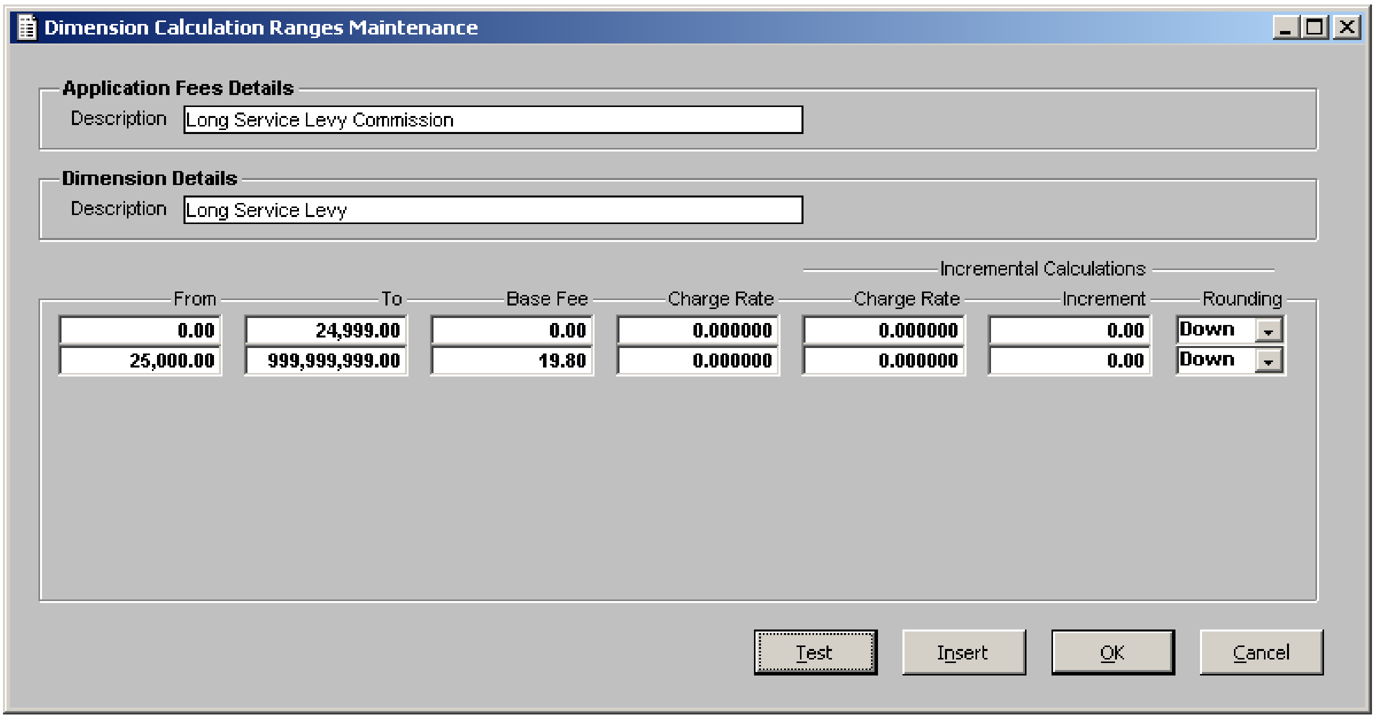


Each of the Fees require Dimensions to be defined for them. These Dimension should be set up as per the following:

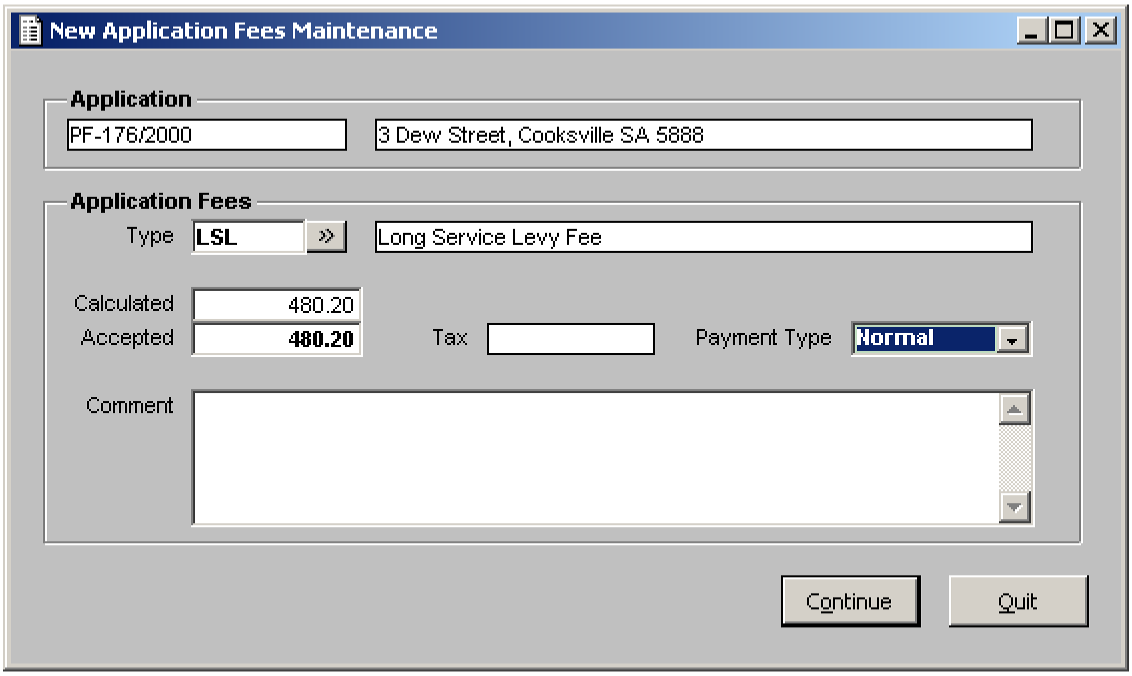
Long Service Levy Fee Dimension Setup



Long Service Levy Commission Dimension Setup



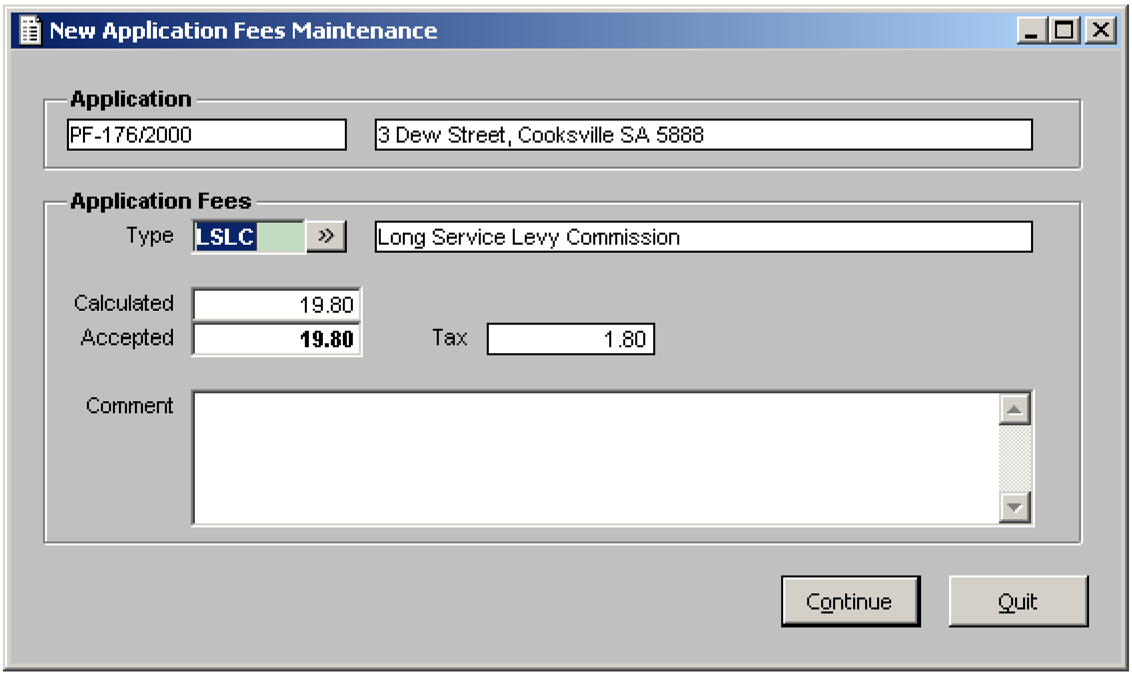
Entry of Long Service Levy Fee



A Long Service Levy fee with Exemption is added in the same manner as a normal fee however, after a Dimension Value has been entered and the User is returned to the New Application Fee Maintenance form, the ‘Accepted Value’ will need to be changed to 0.00 for a Full Exemption or to a new value to be paid for a Partial Exemption (which is sent to the Corproration based on partial exemption given). Details of the Exemption should be entered into the Comments field by the User.

A Fee with Instalment also has the “Accepted Value’ set to 0.00. Selecting the Instalment Option for Pay Type will indicate that this fee is to be paid as Instalment. The User should enter details of the Instalment into the Comments field.

Entry of Long Service Levy Commission Fee

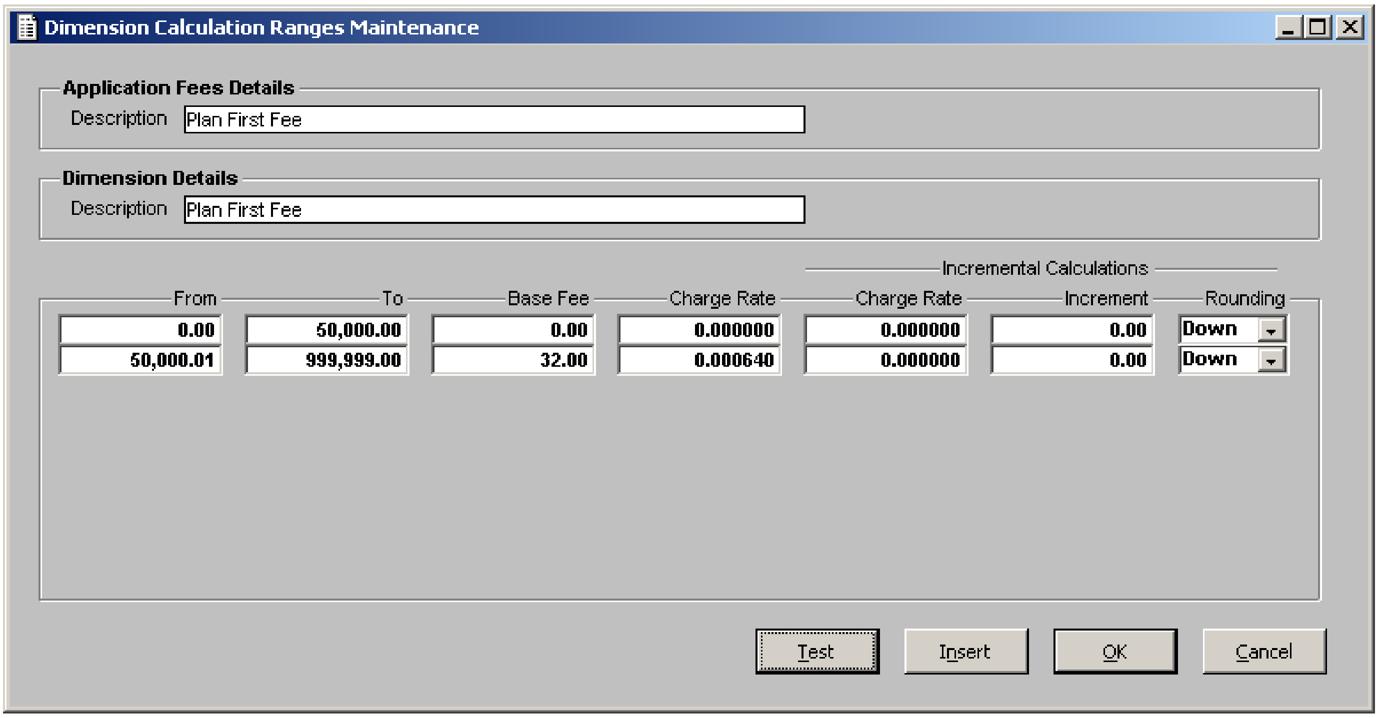


Note that the Long Service Levy Commission fee does not display the Pay Type field as it has not been defined as a LSL Fee. However the Dimension that has been defined for the Long Service Levy Fee is displayed upon entering the Long Service Levy Commission fee as it uses the same Dimension to calculate out the Commission applicable.

Long Service Levy Report
The Long Service Levy Report menu is then run to produce the documentation and Extract File to be sent to the Corporation.

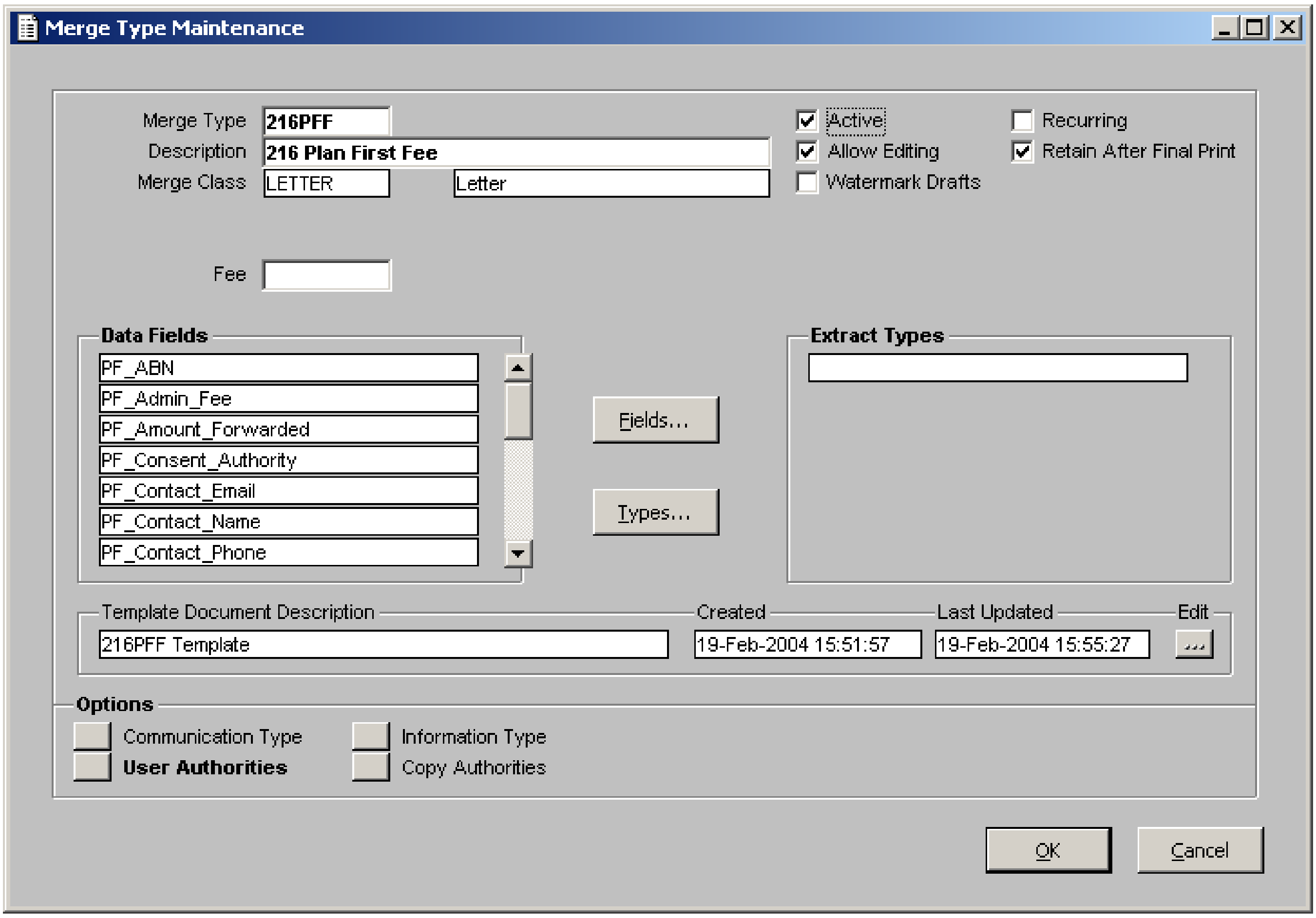
Plan First Fees
A Dimension to calcule the Levy must be setup against a Fee in Application Fee Parameters. This Dimension should be linked to the Report Control form so as to establish the amount of Levy to be extracted for each Application.

The Plan First Fee Dimension is to be defined with the following calculation ranges. The Name of the Dimension can be what ever is decided, however the ranges must be set as shown below.



Plan First Summary Information

The Planning New South Wales require Summary Information to be forwarded to them as a File. To set up what is required to be produced in the File a Template Document is required to be setup in the Merge Type option with Application Parameters. When the Plan First Levy Report is run in 'Update and Report' mode, the Summary Information Document will be created. This Document can then be accessed through Name and Address Maintenance using the 'Roles' button and searching on a Role Type of 'CWP' or via the Municipality Code Maintenance within Application Parameters.

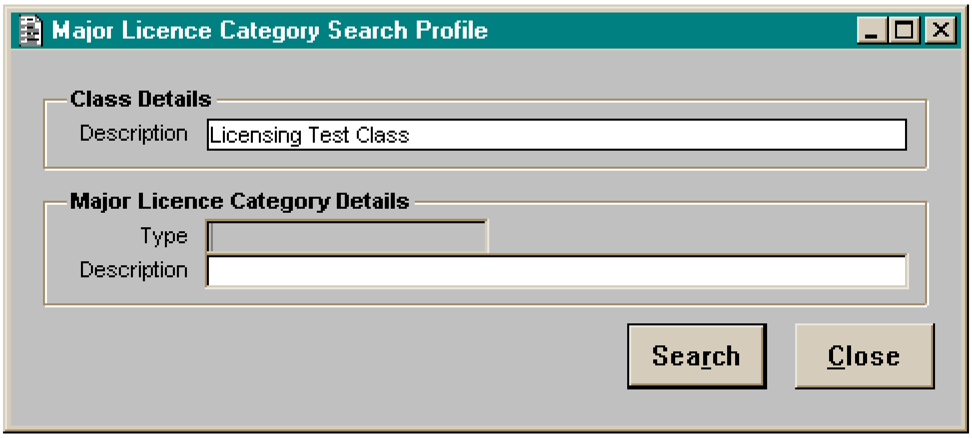


The following fields are available for the Summary Information Document:

Merge Field	Document Field Equivalent
PF_ABN	ABN
PF_Admin_Fee	B: Total amount retained by consent authority
PF_Amount_Forwarded	C: Net amount forwarded to PlanningNSW
PF_Consent_Authority	Consent authority:
PF_Contact_Email	Contact e-mail:
PF_Contact_Name	Contact name:
PF_Contact_Phone	Contact phone:
PF_Contact_Position	Contact position:
PF_EFT_Number	EFT receipt number (if received)
PF_Fee_Collected	A: Total additional fee collected:
PF_Month	Month covered by this return:
PF_Return	Is this a nil return?
PF_Year	Year:

Major Licence Category Search Profile Form

This function allows the User to set up specific categories by Licence. This then allows each Application to be categorised. Each Category can have different base fees and dimensions linked to them.
The Major Class Search Profile Form enables the User to Search for a particular Class.



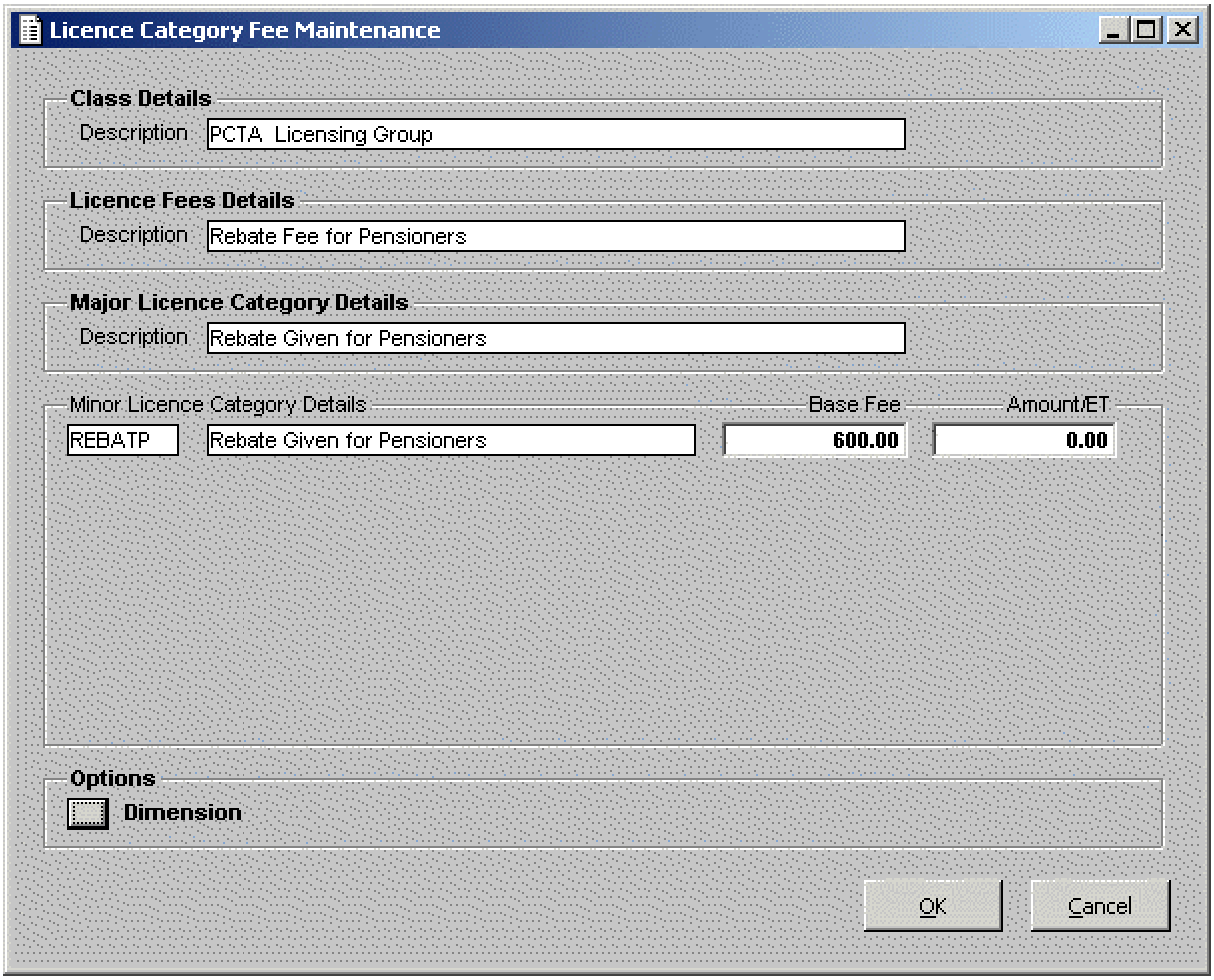
Major Licence Category Search Profile Form

Class Details

The Class Details Field displays the Licence Class that these fees are assigned to.
This field details the dimensions and charges to be set against this particular Category.

Licence Category Fee Maintenance Form

This form details the Category Fee and any Minor Licensing Category Details.



Licence Category Fee Maintenance Form

Class Details - Description

This field details the Application Class that you are currently assigned to.

Licence Fees Details - Description
This field details the Licence Fee that is currently displayed.

Major Licence Category Details – Description
This field details the Major Licence Category that the Fee is assigned to.

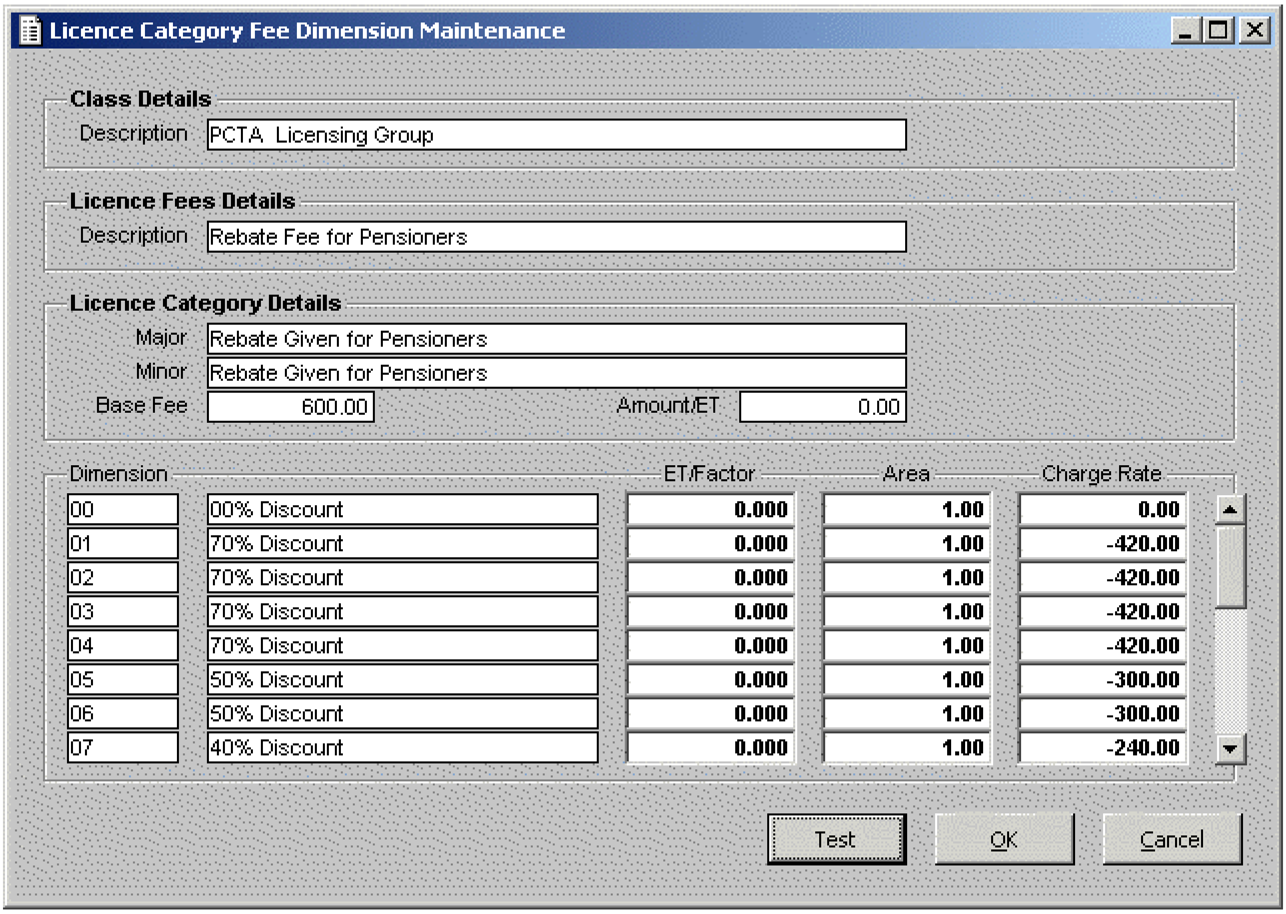
Minor Licence Category Details
This field displays one or more Minor Licence Categories that dimensions can be added to. Each dimension has a separate Factor, Area and Charge Rate against it.

Base Fee
A Base Fee may be attached to this Fee, by entering it in this field.

Amount/ET
An Estimated Total may be entered in this field.

Dimensions
Selecting the Dimension Option allows Dimensions to be defined for the Category.

Licence Category Fee Maintenance Form



Licence Category Fee Dimension Maintenance Form

Class Details - Description
This field details the Application Class that you are currently assigned to.

Licence Fee Details - Description
This field details the Licence Fee that is currently displayed.

Licence Category Details – Major
This field details the Major Licence Category that the Fee is assigned to.

Licence Category Details – Minor
This field details the Minor Licence Categories that the Fee is assigned to.

Licence Category Details – Base Fee
The Base Fee field displays any Base fee that has been assigned to the Fee.

Licence Category Details – Amount/ET
The Amount/ET field displays any Amount/ET that may have been assigned to the Fee.

Dimensions

This field details the dimensions and charges to be set against this particular Category.

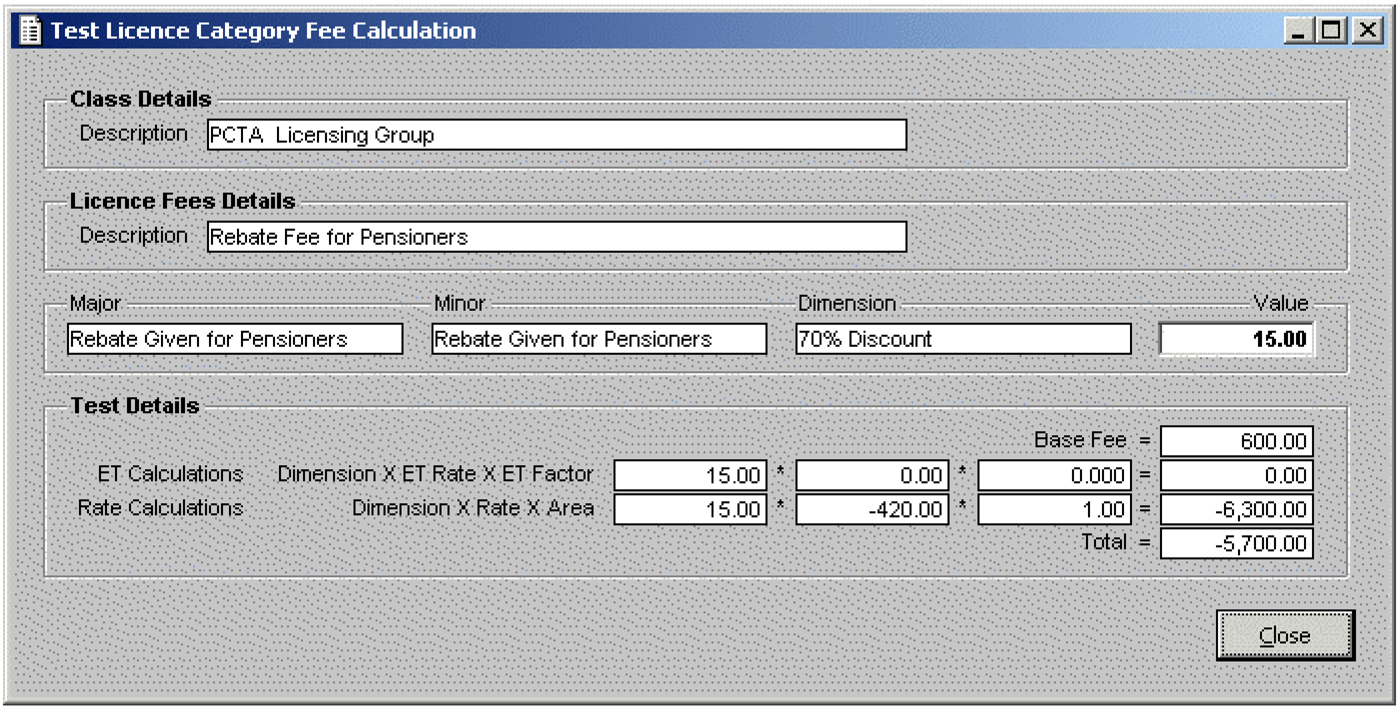
ET/Factor
This field is used to calculate the Extra Tenement Factor. This may be used to calculate an extra fee based upon how many rooms are in a house, and this fee is a levy for such items as sewerage. In this instance, the more rooms a house has, then the ET factor would be higher for a 5 bedroom home than a 1 bedroom unit.

Area
This field may be used to enter a particular area for calculation of the fee.

Charge Rate
This field may be used to enter a specific Charge Rate for the Dimension.

Test Button
Selecting the Test Button will display the Test Fee Calculation Form where the User is able to enter in a value and have the system calculate out the amount that will be charged for the fee.

Test Licence Category Fee Calculation Form



Test Licence Category Fee Calculation Form

Class Details - Description
This field details the Application Class that you are currently assigned to.

Licence Fees Details - Description

This field details the Licence Fee that is currently displayed.

Major
This field details the Major Licence Category that the Fee is assigned to.

Minor
This field details the Minor Licence Categories that the Fee is assigned to.

Dimension
This field details the Dimension that the Fee is using for the Test function.

Value
The Value field is used to enter in the Dimension Value so that when the User tabs out of the field the Test Details will display the results of the Test.

Test Details

The ET Field is used to calculate the Extra Tenement Factor. This may be used to calculate an extra fee based upon how many room are in a house, and this fee is a levy for such items as sewerage. In this instance, the more rooms a house has, then the ET factor would be higher for a 5 bedroom home than a 1 bedroom unit.

The Area Field may be used to enter a particular area for calculation of the fee.

The ET Rate Field may be used to enter a specific Charge Rate for the Dimension.

These fields are populated from the information that has been entered on the previous form. Once a Value has been entered in and the User has tabbed out of the field then the values in these fields are calculated out to give the result of the use of the Value entered.

Deposits

Deposit Fees are always treated as Cash, even when operating under the Accrual mode, eg. they do not ever generate debt transactions to the Ledger.

The following details the account entries that are generated when Fees are Refunded or Retained.

RECEIPT ENTRY

Debit Bank Account

Credit Deposit Account
Tax Cash Account (if applicable)

DEPOSIT RETAINED

Using the amount of the Deposit that has been Retained.

Reverse original Receipt Entry

Debit Deposit Account
Tax Cash Account (if applicable)

Credit Bank Account

New Allocations

Debit Retained Bank Account

Credit Retained Revenue Account
Tax Cash Account (if applicable)

NOTE: It is quite valid (where required) that the Deposit Accounts and Deposit Retained Accounts are from different Ledgers. Therefore the Ledger allocation is relevant to each set of accounts.

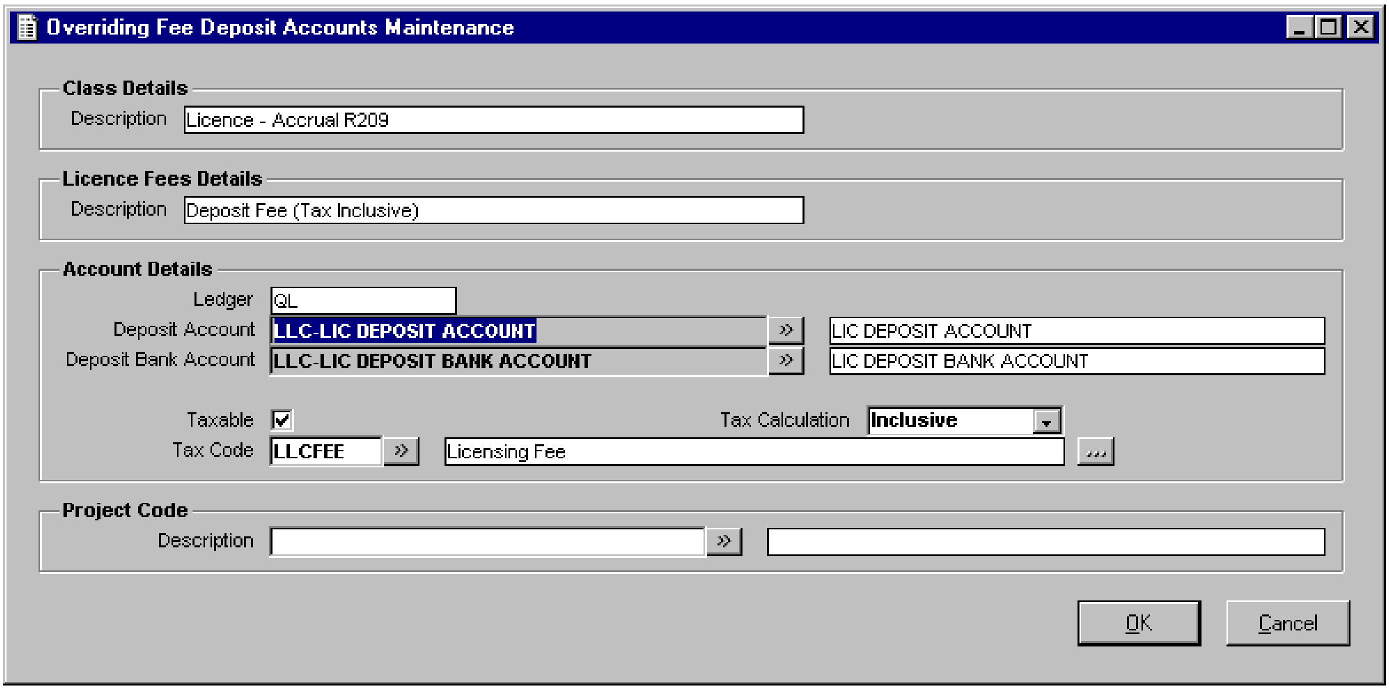
This enables the Deposit Accounts to be held within a Trust Ledger.

Tax in Australia would not be applied to the Deposit, however it could be valid that Tax must be paid on the ‘Retained’ value as it may be considered goods and services.

The Taxable Flag is nominated at both the Deposit and the Retained account forms, thereby allowing them to be separated.

Overriding Fee Deposit Accounts Maintenance Form

The Overriding Fee Deposit Accounts Maintenance Form is designed to allow specific accounts for a particular fee to be entered. These Accounts are stored separately from licensing fees. If these accounts are used they override the standard fee accounts.



Overriding Fee Deposit Accounts Maintenance Form

Class Details - Description
This field details the Licence Class selected.

Licence Fee Details –Description
This field displays a description of the Licence Fee selected.

Ledger
This field will detail the Actual Ledger that is to store the relevant Account information for this Fee.
Account Details

Deposit Account
The Account Code can be entered if known, or the Pop Up Button can be used to select from a predefined list

Deposit Bank Account
The Account Code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

To see how these Accounts are treated during transactions see the iii section.

Taxable
Check this flag on if tax is to apply to the fee.

Tax Calculation
This field allows a method of tax calculation to be selected from the dropdown. The options available are as follows:

- Inclusive
- Exclusive

Tax Code

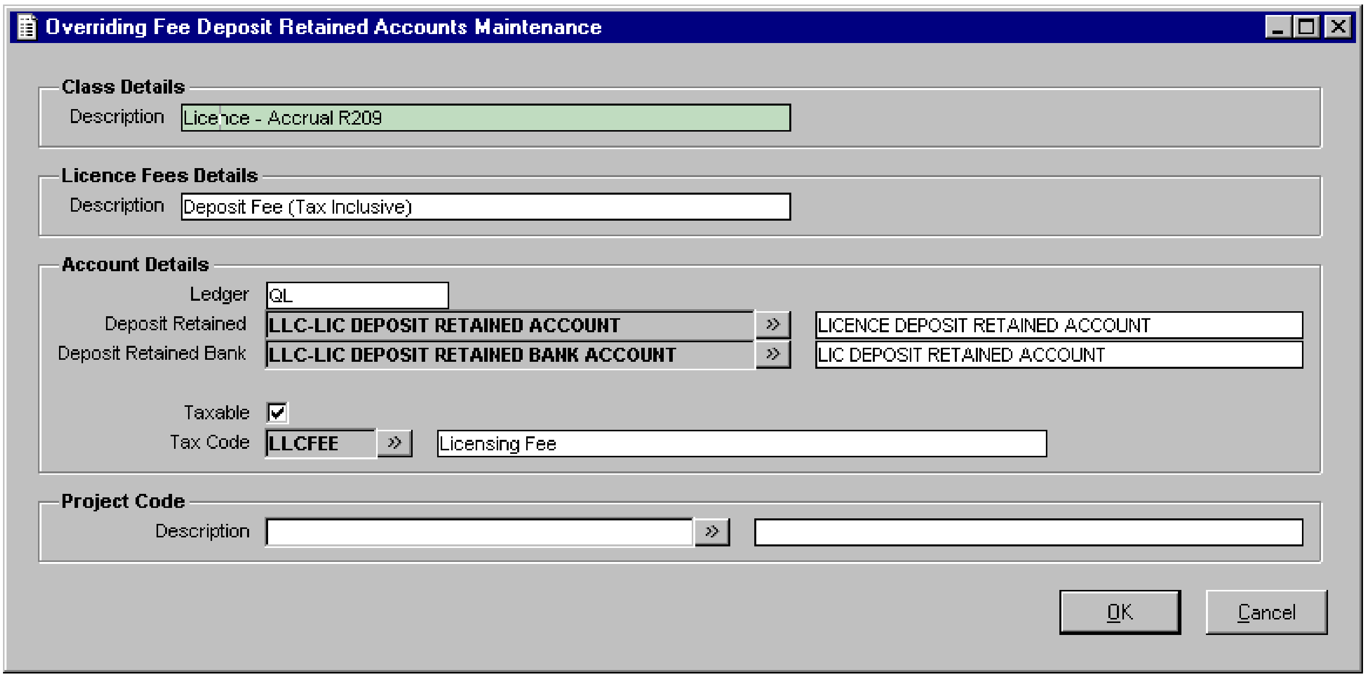
These fields are used to enter the Account Number that the Fee will have the Tax entered against. The Account Code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

Project Code

These fields are used to enter the Project Code and Description that will be applicable to the Fee. The Project Code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

Overriding Fee Deposit Retained Accounts Maintenance Form

The Overriding Fee Deposit Retained Accounts Maintenance Form is designed to allow specific accounts for a particular fee to be entered. These Accounts are stored separately from application fees. If these accounts are used they override the standard fee accounts.



Overriding Fee Deposit Retained Accounts Maintenance Form

Class Details – Description
This field details the Licence Class selected.

Licence Fee Details –Description
This field displays a description of the Licence Fee selected.

Ledger
This field will detail the Actual Ledger that is to store the relevant Account information for this Fee.

Account Details

<u>Deposit Retained Account</u>
The Account Code can be entered if known, or the Pop Up Button can be used to select from a predefined list
<u>Deposit Retained Bank Account</u>
The Account Code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

To see how these Accounts are treated during transactions see the iii section.

Taxable
Check this flag on if tax is to apply to the fee.

Tax Code

These fields are used to enter the Account Number that the Fee will have the Tax entered against. The Account Code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

Project Code

These fields are used to enter the Project Code and Description that will be applicable to the Fee. The Project Code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

Licence Type

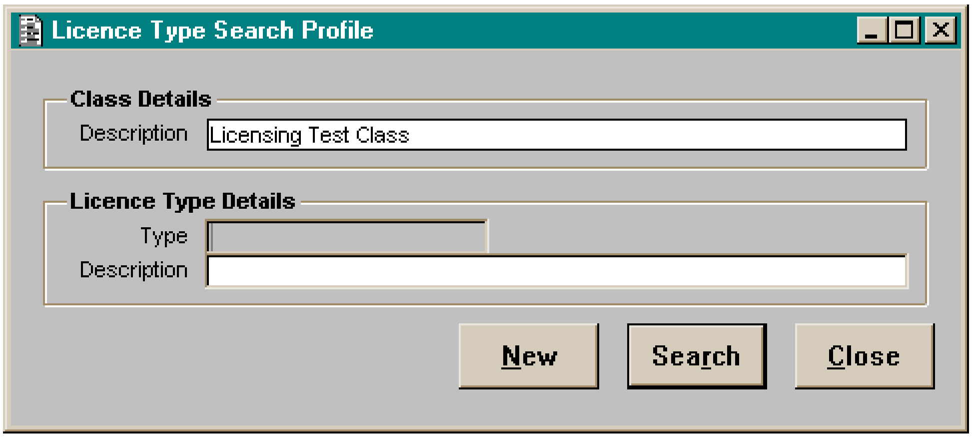
Licence Types are created for every Licence Class. These Licence Type Parameters can be linked to specific options to reduce processing time.

Licence Types can be linked to:

- Procedure Codes
- One or more Fee Codes
- One or more Consent Types
- One or more Component Types
- One or more Dimension Types

Licence Type Search Profile Form

The Licence Search Profile may be used to Search for a previously created Licence Type, or create a new Licence Type by selecting the New Button.



Licence Type Search Profile Form

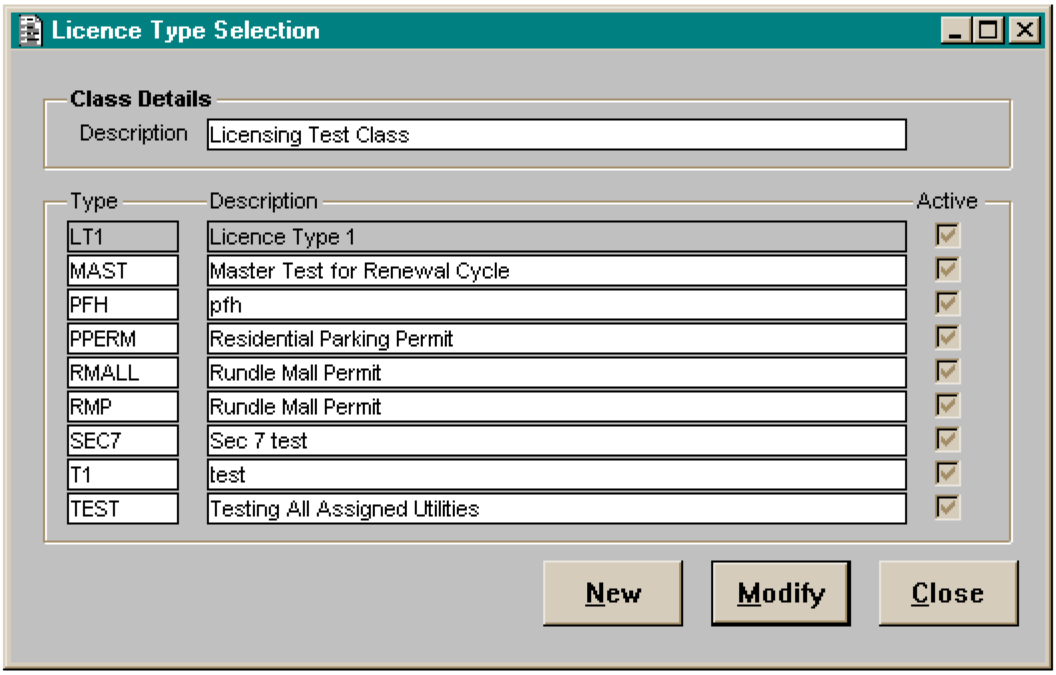
Class Details
This field contains the description of the Class of Licence to which you are assigning A Licence Type. This field is display only and may not be maintained.

Licence Type Details
This field allows for Entry of a Licence Type prior to clicking on the Search Button.

Description
This field allows for the entry of a fuller description of the Licence Type. The Search button can then be selected to produce a list of Matched Items.
Pressing the Select Button on the Search Profile Option moves to the Licence Type Selection Form.

Licence Type Selection Form

The Licence Type Selection provides a list of previously created Licence Types together with the options to Modify or Create new ones.



Licence Type Selection Form

Class Details
This field contains the description of the Class of Licence to which you are assigning A Licence Type. This field is display only and may not be maintained.

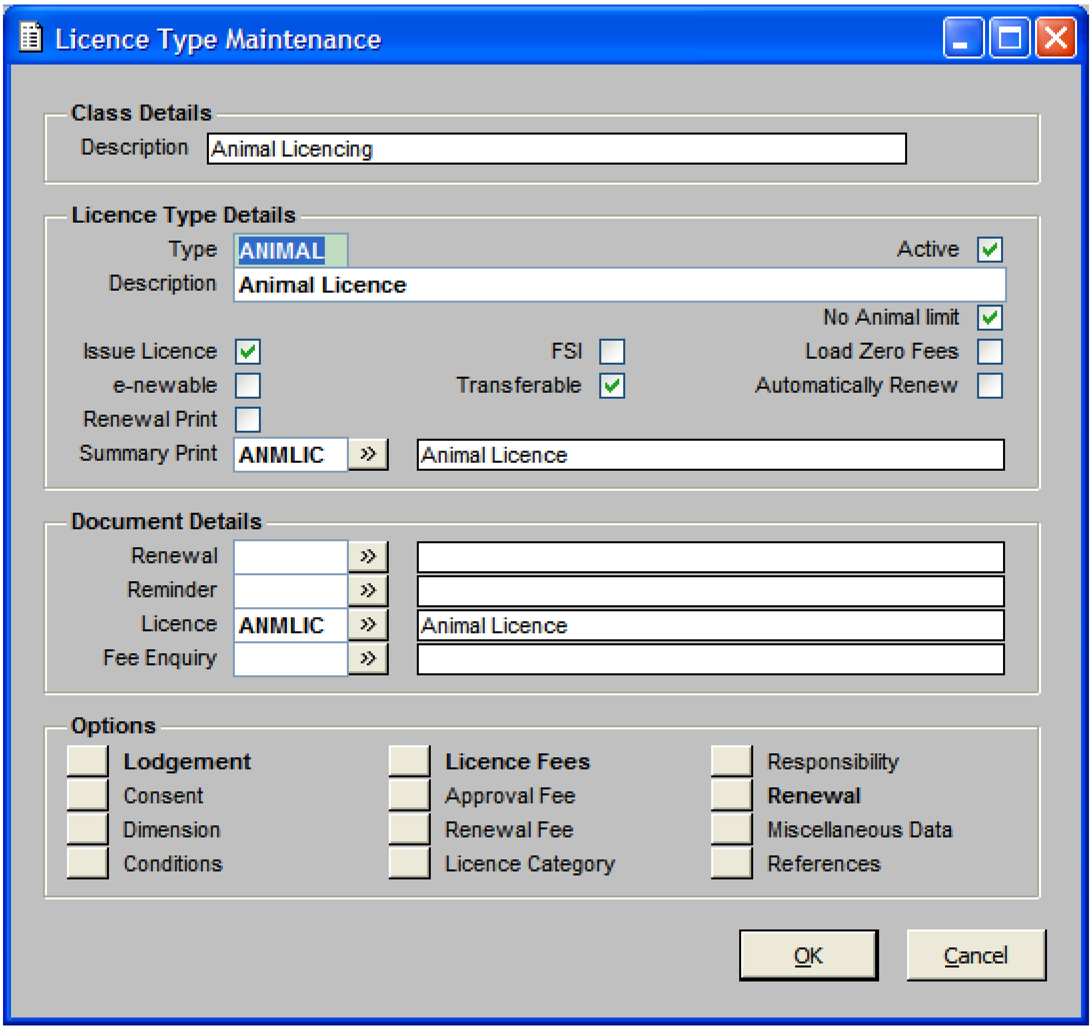
Licence Type Details
This field lists the coded entry for the Licence Type.

Description
This field holds the fuller description of the Licence Type.

Active Button
On this form the Button is in Display Mode only and cannot be maintained.
Clicking on the New Button from the Licence Selection Form will move to the Licence Maintenance Form.

Licence Type Maintenance Form

The Licence Type Maintenance Form allows for the entry of a new Licence Type, or modification for an existing one. Default setting for the lodgement process and renewal processes can be defined.



Licence Type Maintenance Form

Class Details - Description

This field contains the description of the Class of Licence to which you are assigning A Licence Type. This field is display only and may not be maintained

Licence Type Details - Type

This Field details the actual code name given to the Licence Type this is a six figure alphanumeric field.

Licence Type Details - Active

The Active check box if checked on will allow this Licence Type to be used. If this is checked off, then the Licence Type is inactive and cannot be selected when Lodging and Licence.

Licence Type Details - Description

This field allows for a fuller description of the Licence Type to be entered.

Licence Type Details – No Animal Limit

A new parameter called 'No Animal Limit' has been added to the Licence Type Maintenance form (as of Release 3.06). Turning this parameter on will allow the maximum number of animals to be exceeded when attaching related animals to a Licence of this type.

Licence Type Details - Summary

This fields details the name of the document to be used for printing the Licence Summary Sheet and its fuller description

Licence Type Details – Issue Licence

This field if checked will allocate a new Licence Number to the Licence when the Renewal Process is run. If left unchecked then the original Licence Number will be retained for the Renewal.

Licence Type Details – FSI

All Licence Types which are to be included in the VICFIN update must have the FSI Tick Box checked on at the License Type Maintenance Parameter Form. Where the FSI Flag is checked OFF then the Licensing Summary form will not display the Check Box.

Licence Type Details - Load Zero Fees

The Load Zero Fees flag allows the setting of whether Zero Calculated Fees will be loaded at time of Lodgement and Change of Licence Type.

When flagged On and fees are defined as being loaded with a zero amount, or are associated to a dimension which has a zero value, these fees will be loaded during lodgement.

Where flagged Off then any fees that have a value of Zero will not be included at lodgement or Change of Type processing.

Licence Type Details – e-newable

All Licence Types which will allow the issuing of Renewal Notices etc by Email need to have this flag set on. Once set on when a Licence is entered for a Licencee, if that Licencee does not have Customer Profile set up, the User will be prompted for the entry of this information. When the Renewal Process is run then depending on how the Licencee has been defined will determine if the Renewal is printed or Emailed to the Licencee.

Licence Type Details – Transferable

All Licence Types which can be transferred need to have this option Ticked On. If the Transferable field is not flagged on then the Transfer option within Licensing Maintenance is not available for used.

Licence Type Details - Automatically Renew

This field if checked will update the Expiry Date and the Print Licence Flag on the Licence. At the time of Renewal the original Licence Number will be retained.

Licence Type Details – Renewal Print

A new 'Renewal Print' flag was requested to be made available for a Licence Type.

When a Licence Type has the 'Renewal Print' flag checked ON and the Licence Renewal Report is run in Update and Report Mode then each Licence meeting the standard renewal criteria will have the Licence Print flag turned ON.

This mimics the "Automatically Renew" functionality however the "Renewal Print' flag will NOT update the Licence Expiry Date.

The Standard Licence Renewal Workflow is now as follows:
The Licence Renewal Workflow is based on:

- Having an Approval on the latest Licence decision
- The Expiry Date falls within the Range selected on the control form and
- Status of the Licence is different from that of the Renewal Control.

When the Batch Renewal Process is run in Update and Report Mode the following occurs:

- The Status of the Licence will be updated
- Where the “Issue Licence Flag” is checked ON at the Licence Type Parameter:
    - A new Licence Number will be created for each Licence
- Where the “Issue Licence Flag” is checked OFF at the Licence Type Parameter:
    - Each Licence will keep their existing number
- Where the “Automatically Renew Flag” is checked ON at the Licence Type Parameter:
    - Each Licence Expiry Date will be updated based on the Licence Parameter Renewal setting

- Each Licence will have the Print Licence flag checked ON in Licence Data Maintenance

- Where the “Automatically Renew Flag” is checked OFF at the Licence Type Parameter:
  - Each Licence’s Expiry Date will NOT be updated
  - Each Licence Print Licence Flag will NOT be checked ON in Licence Data Maintenance
- Where the “Renewal Print Flag” is checked ON at the Licence Type Parameter:
  - Each Licence’s Expiry Date will NOT be updated
  - Each Licence Print Flag WILL be checked on in Licence Data Maintenance
- Where the “Renewal Print Flag” is checked OFF at the Licence Type Parameter:
  - The system will check the other two Flags and update accordingly.
- Fees will be raised (if Renewal Fees selected at the Type Level)
- Notice will generated and or printed (If Renewal Merge Type has been created)
- Report will be generated

Please note users should not check ON both the Renewal Print Flag and the Automatically Renew Flag at the same time.

Document Details - Renewal
This field allows the User to enter a particular Merge Type to assign to the Licence Type, for a Renewal Document. The User may enter the Code of the Merge Type if know, or select from the Pop Up Button, a list of predefined Merge Types. When the Renewal Process is run this Merge Type will be used to generate the document if the Merge Type is not overridden during the Renewal Process.

Document Details - Reminder
This field allows the User to enter a particular Merge Type to assign to the Licence Type, for a Reminder Document. The User may enter the Code of the Merge Type if know, or select from the Pop Up Button, a list of predefined Merge Types. When the Reminder Process is run this Merge Type will be used to generate the document if the Merge Type is not overridden during the Reminder Process.

Document Details - Licence
This field allows the User to enter a particular Merge Type to assign to the Licence Type, for a Licence Document. The User may enter the Code of the Merge Type if know, or select from the Pop Up Button, a list of predefined Merge Types. When the Licence Print Process is run this Merge Type will be used to generate the document if the Merge Type is not overridden during the Licence Print Process.

Options - Lodgement Button
This button when selected details the User out to the Licence Entry Details Form.
This form is detailed further in this document.

Options - Licence Fees Button
This Licence Fees Button allows specific fees to be assigned to this Licence Type. This form is detailed further in this document in the Assign Fee Maintenance Section.

Options - Responsibility Button
This Responsibility Button allows specific Responsible Officers to be assigned to this Licence Type.

Options - Consent Button
The Consents Button allows specific consents to be assigned to this Licence Type. This form is detailed further in this document.

Options - Approval Fee Button
This button when selected details the User out to the Approval Fee Form. This is detailed further in this document in the Assign Fee Maintenance Section.

Options - Renewal Button
This button when selected details the User out to the Licence Renewal Maintenance Form. This is detailed further in this document.

Options - Dimension Button
This button when selected details the User out to the Licence Dimensions Assignment Form. This is detailed further in this document.

Options - Renewal Fee Button
This button when selected details the User out to the Renewal Fee Form. This is detailed further in this document in the Assign Fees Maintenance Section.

Options – Miscellaneous Data Button
This button when selected details the User out to the Miscellaneous Data Maintenance Form. This is detailed further in this document.

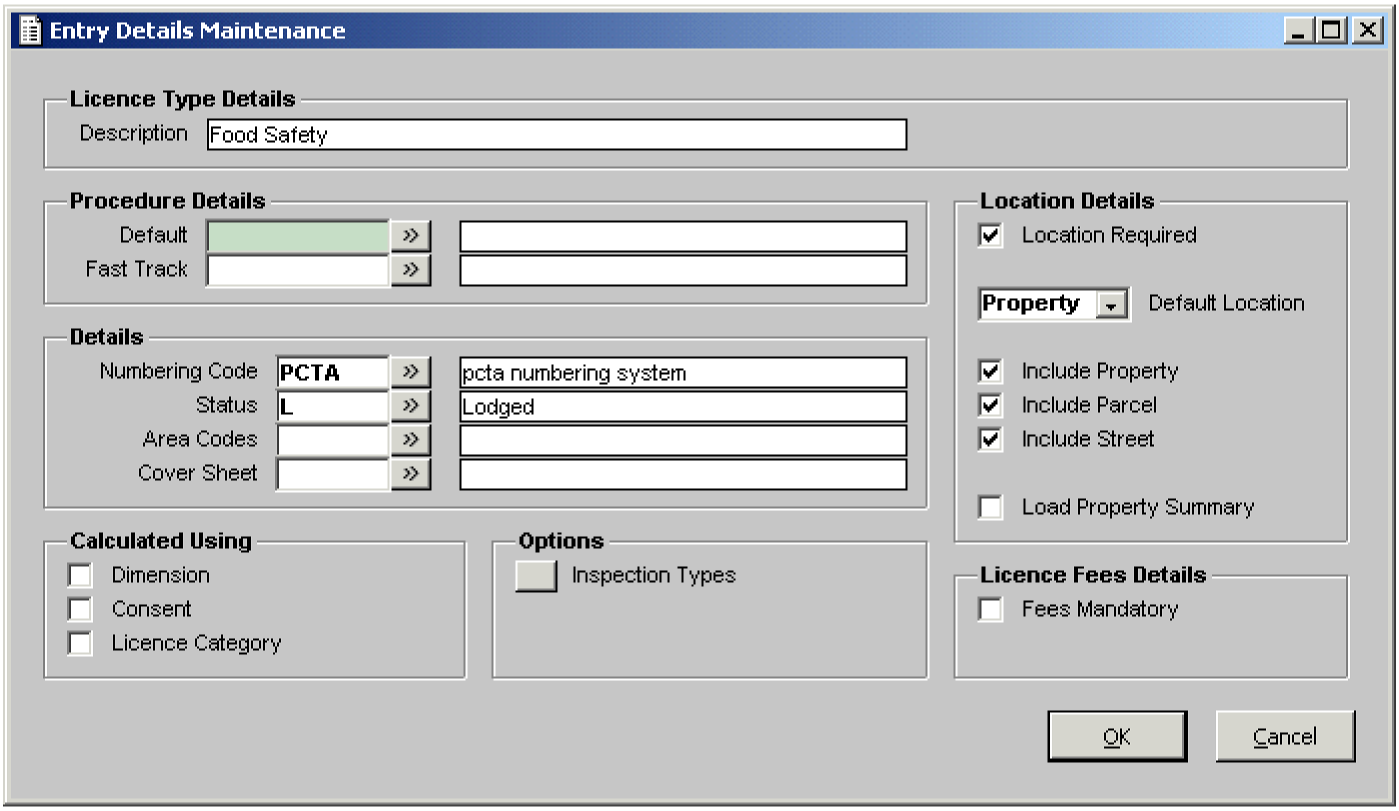
Options - Conditions Button
This button when selected details the User out to the Conditions Maintenance Form. This is detailed further in this document.

Options – Licence Category Button
This button when selected details the User out to the Licence Category Maintenance Form. This is detailed further in this document.

Options – References Button
This button when selected allows the user to select one or more Reference Types to be defaulted against the Licence Type being created.

Entry Details Maintenance Form

The Licence Entry Options Maintenance allows for specific parameters to be entered that will speed up the actual Licence Entry Process.



Entry Details Maintenance Form

Licence Type Details Description
This field details the description of the Licence Type.

Default Procedure Details and Description
This field may detail the specific Procedure Code that has been defined as being the Default Procedure Code and a description of this Code. Enter the Code if known, or select the Pop Up Button to choose from a predefined list of Procedures.

Fast Track Procedure Details and Description
These fields may detail the specific Procedure Code used to Fast Track a Licence and its description.

Details - Numbering Code
This field may detail the specific Numbering Code that has been defined as being the Numbering Code and a description of this Code for this particular Licence Type. Enter the Code if known, or select the Pop Up Button to choose from a predefined list of Numbering Codes

Details - Status
This field may detail the specific Status Code that has been defined to assign to this particular Licence Type. Enter the Code if known, or select the Pop Up Button to choose from a predefined list of Status Codes.

Details - Area Code
This field may detail the specific Area Code that has been defined to assign to this Licence Type. Enter the Code if known, or select the Pop Up Button to choose from a predefined list of Area Codes.

Details - Cover Sheet
This field may detail the specific Merge Type that has been defined as being required to Print for this Licence Type. Enter the Code if known, or select the Pop Up Button to choose from a predefined list of Merge Types.

Calculated Using - Dimensions
If this Field is checked on when a Licence is lodged, its Fees will be calculated using Dimensions.
If unchecked, Dimensions will not be taken into consideration when a Licence is lodged.

Calculated Using - Consent
If this Field is checked on when a Licence is lodged, its Fees will be calculated using Consents.
If unchecked, Consents will not be taken into consideration when a Licence is lodged.

Calculate Using – Licence Category
If this Field is checked on when a Licence is lodged, its Fees will be calculated using Licence Category.
If unchecked, Categories will not be taken into consideration when a Licence is lodged.

Options – Inspection Types
This field allows the User to display the Inspection Type Maintenance Form. From this form the User is able to enter in any Inspections Types that are required to be automatically loaded against a Licence when a Licence is lodged for this Licence Type.

Location Details - Location Required
The Locations Required check box must be checked if a Location is required at the time of Licence Entry.
If this box is left unchecked then a Location will not be required at the time of Licence Entry.

Location Details - Include Property
This box if checked on will include the Property Details into the Licence at Licence Entry.
If unchecked the Property Details will not be included in the Licence.

Location Details - Include Parcel
This box if checked on will include the Parcel Details in the Licence.
If unchecked the Parcel Details will not be included in the Licence.

Location Details - Include Street
If checked on this Field will allow a Licence to be lodged against a Street in the Council rather than a particular Property.
If unchecked then Licensing can only be lodged against Properties.

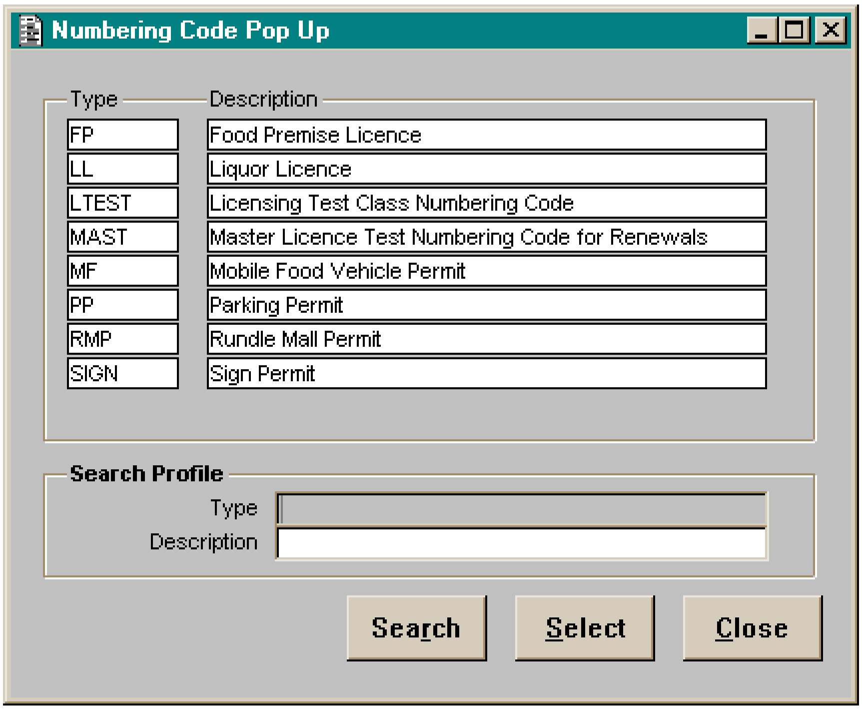
Location Details - Default Location

This Drop Down Box allows for the Selection of either Street, Property or Parcel as the Default Location for a Licence to be lodged against.

Licence Fees Details - Fees Mandatory
If checked on this Field will ensure that Fees must be entered when the Licence is Lodged.
If unchecked then Fees need not be entered at the time e of Licence Entry, but can be entered at a later date.

Numbering Code Pop Up Form

The Numbering Code Pop Up form is used to display a list of valid Numbering Codes for the Licensing Class.



Numbering Code Pop Up Form

Type / Description
The Numbering Codes and their Descriptions available for selection are displayed in this field.

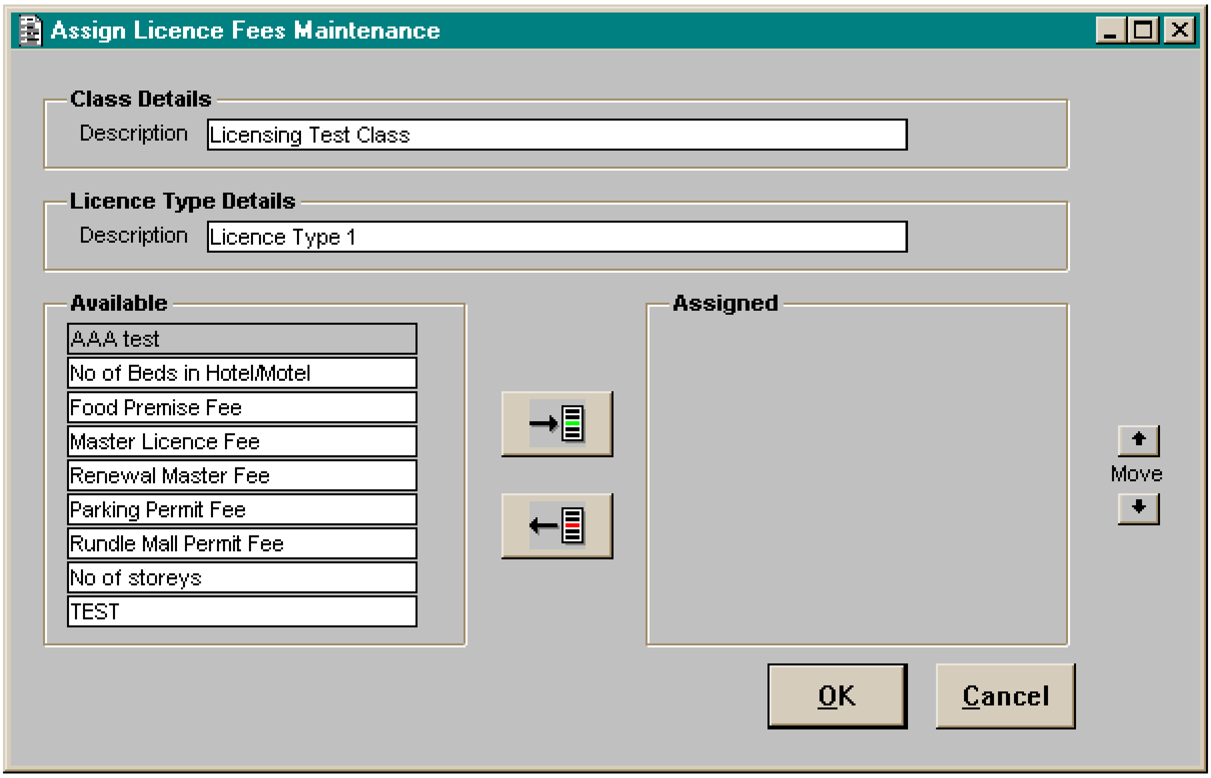
Search Profile – Type
The Type Search Profile can be used to find a specific Numbering Code. Wildcard searching is available in this field.

Search Profile – Description
The Description Search Profile can be used to find a specific Numbering Code. Wildcard searching is available in this field.

Assign Licence Fees Maintenance Form

The Assign Licence Fees Maintenance Form allows specific Licence Fees to be assigned to this Licence Type.

This form is the same form used for Licence Fees, Renewal Fees and Approval Fees



Assign Licence Fees Maintenance Form

Class Details Description
The Class Description Detail Field describes the name of the actual Class currently being used.

Licence Type Details Description
This field contains the description of the Class of Licence to which you are assigning A Licence Type.

Available
This field lists the available Fee Types that can be Assigned to this Licence Type.

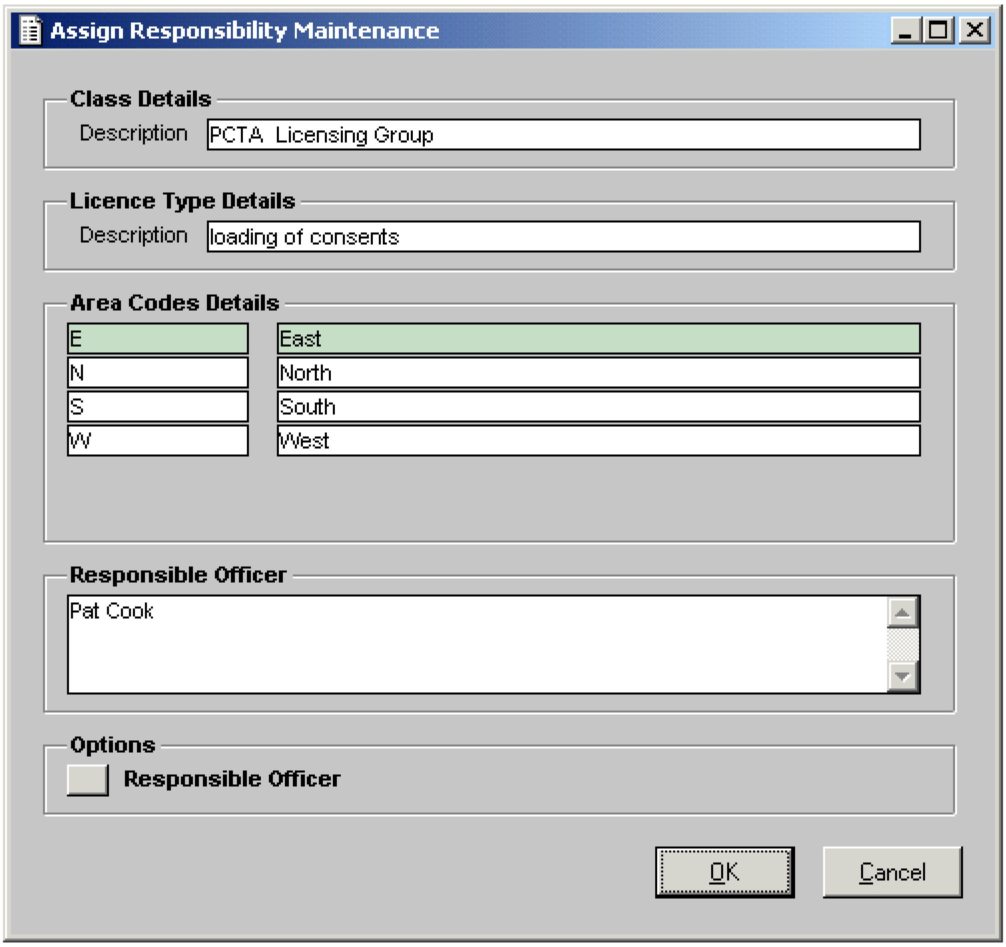
Assigned
This field lists the Fee Types that have been assigned to this Licence Type.

Fee Types can be assigned or unassigned by highlighting the particular Fee Type and clicking on either the Select or Remove buttons located in the centre of the form.
The Select Button has an arrow facing to the right hand side of the form and has a green stripe in the middle of it.
The Remove Button has an arrow facing to the left hand side of the form and has a red stripe in the middle of it.

Fee Types that are available or Assigned may be repositioned using the up and down Move arrows located to the very right hand side of the form. The Fee should be highlighted and then the appropriate up or down arrow selected to change the position of the Fee Type in the list.

Assign Responsibility Maintenance Form

The Assign Responsibility Maintenance form is designed to allow Responsible Officers to be linked to particular Area Codes for the Licence Type.



Assign Responsibility Maintenance Form

Class Details Description
The Class Description Detail Field describes the name of the actual Class currently being used.

Licence Type Details Description
This field contains the description of the Class of Licence to which you are assigning A Licence Type.

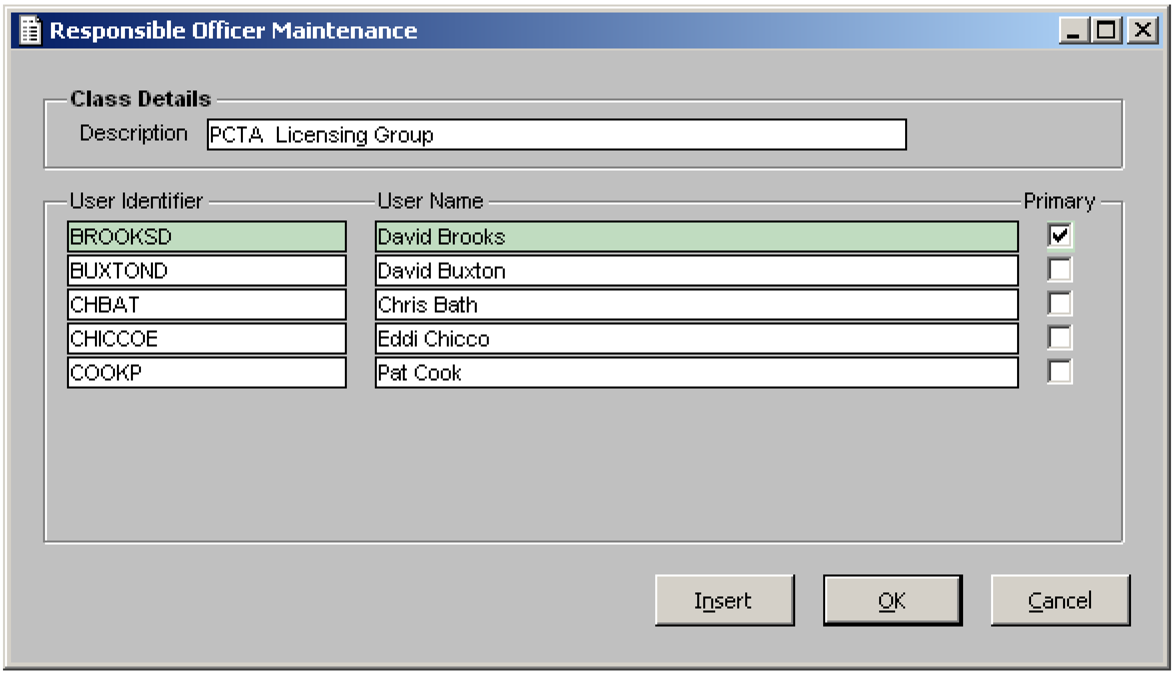
Area Codes Details
This field lists the Area Codes previously defined in the system.

Responsible Officer
The Responsible Officer field displays a list of the Responsible Officers that have been assigned to the Area Code that currently has focus. This list is updated with the appropriate Officers as the focus is moved from one Area to the next.

Options - Responsible Officer
The Responsible Officer Option is used to display the Responsible Officer Maintenance form. From this form the user is able to maintain the Responsible Officers that are applicable for the Area Code.

Responsible Officer Maintenance Form

The Responsible Officer Maintenance Form is used to assign the Responsible Officers for a particular Area.



Responsible Officer Maintenance Form

Class Details Description
The Class Description Detail Field describes the name of the actual Class currently being used.

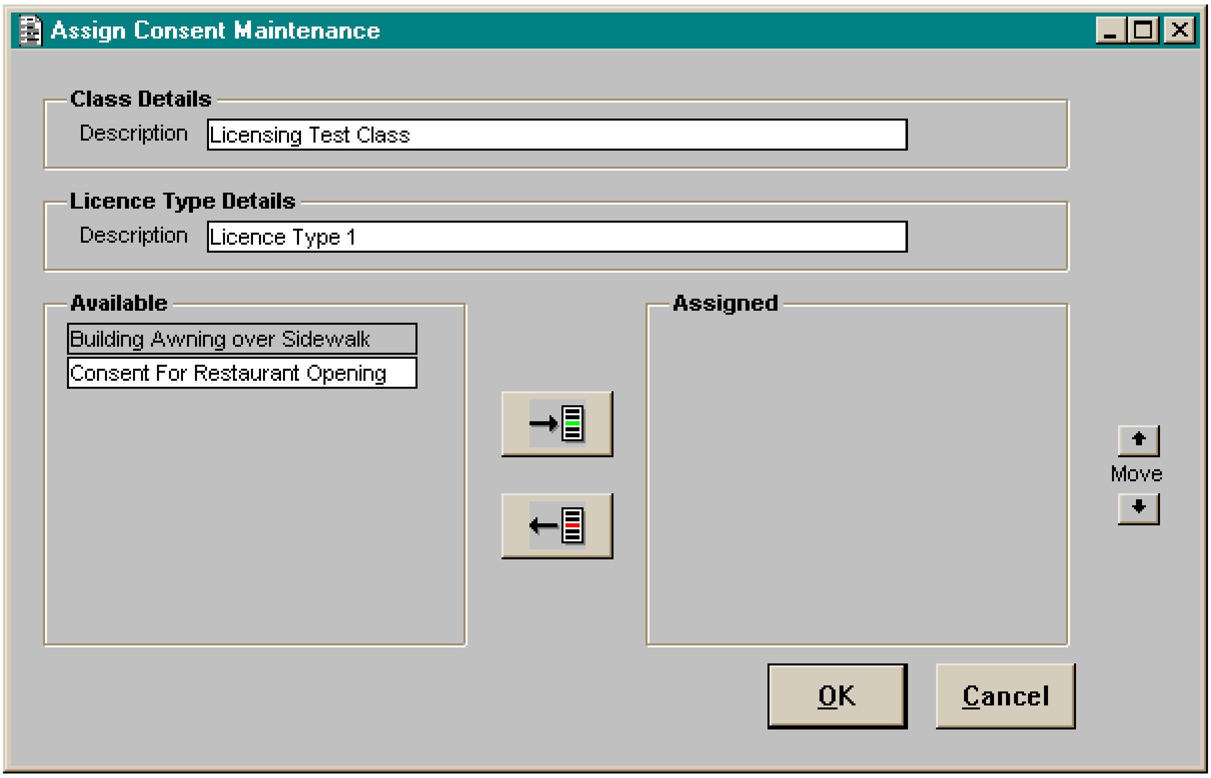
User Identifier
The User Identifier of the Responsible Officer is displayed in this field.

User Name
The Name of the Responsible Officer is displayed in this field.

Primary
The Primary Flag is used to identifier the Responsible Officer who is the primary officer for the Group. At least one Officer has to be made the Primary Officer. This can be changed within the Licence itself.

Assign Consent Maintenance Form

The Assign Consents Form allows specific consents to be assigned to this Licence Type.



Assign Consent Maintenance Form

Class Details Description
The Class Description Detail Field describes the name of the actual Class currently being used.

Licence Type Details Description
This field contains the description of the Class of Licence to which you are assigning A Licence Type.

Available
This field lists the available Consent Types that can be Assigned to this Licence Type.

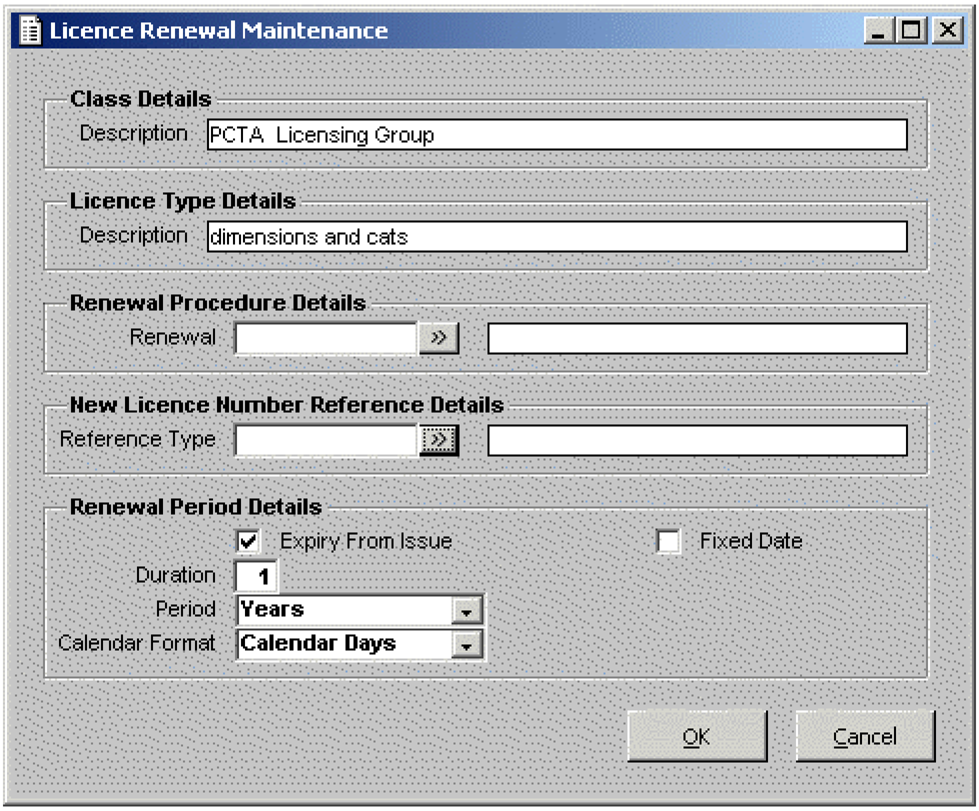
Assigned
This field lists the Consent Types that have been assigned to this Licence Type.

Consent Types can be assigned or unassigned by highlighting the particular Consent Type and clicking on either the Select or Remove buttons located in the centre of the form.
The Select Button has an arrow facing to the right hand side of the form and has a green stripe in the middle of it.
The Remove Button has an arrow facing to the left hand side of the form and has a red stripe in the middle of it.

Consent Types that are available or Assigned may be repositioned using the up and down Move arrows located to the very right hand side of the form. The Consent Type should be highlighted and then the appropriate up or down arrow selected to change the position of the Consent Type in the list.

Licence Renewal Maintenance Form

The Licence Renewal Maintenance Form is used to define the parameters that are to be used in determining when the Renewal Process is to be performed.



Licence Renewal Maintenance Form

Class Details - Description
This field details the Current Class and Description of the Licence.

Licence Type Details - Description
This field details the description of the Licence Type Selected.

Renewal Procedure Details – Renewal

This field allows the User to enter a Procedure Type for the Renewal of the Licence. A Procedure may be keyed directly if the code is known, or use the Pop Up Button to select a list of predefined Procedure Codes.

New Licence Number Reference Details - Reference Type

This field allows the User to enter a Reference Type for the Renewal of the Licence. If a reference type is included in this field when a licence is renewed and a new licence number given, this reference type will also be added.

Renewal Period Details - Expiry from Issue and Fixed Date

The Renewal Period Details has two check buttons - Expiry from Issue and Fixed Date. Depending on which of these check boxes is selected a series of options may be chosen. These are detailed below.

If the Expiry from Issue button is checked, three fields require input; these are Duration, Period and Calendar Format.

If Fixed Date is checked, three different fields require input; these being Period, Day of Month and Month.

Duration
Enter a Duration time in this box, which is further, determined by the Period below: This duration is a number field that will consist of Days, Months or Years.

Period
The Period of the duration may be Days, Months or Years.
Select the Required Period by either keying the first letter of each or using the drop down button and selected the Period.

Calendar Format

The Calendar Format allows the User to select either Calendar Days or Working Days for the Expiry to be calculated on.

Period
The Period of the duration may be Days, Months or Years.
Select the Required Period by either keying the first letter of each or using the drop down button and selected the Period.

Day of Month
This field allows the User to enter the specific day of the Month that this Licence may be renewed on.

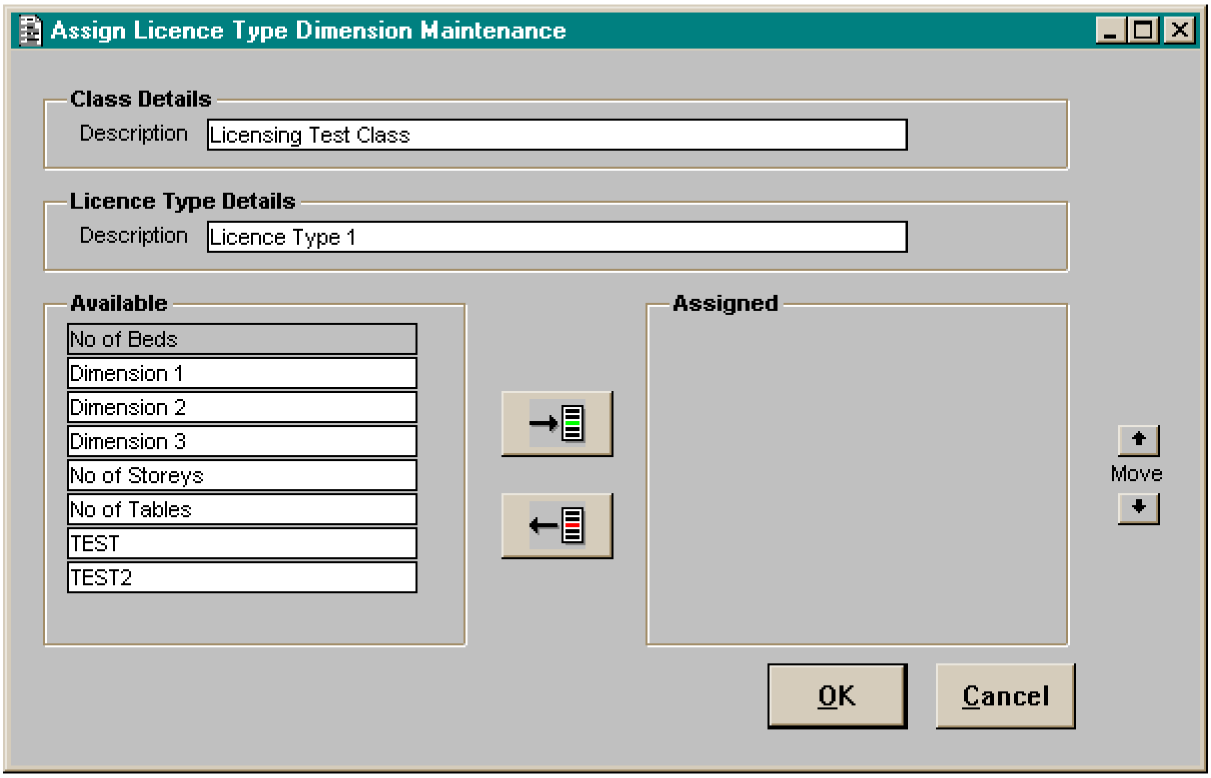
Month
The Month field is only displayed when a Fixed Date has been nominated to use a Period of either Yearly or Quarterly.

For Yearly the full 12 months are displayed to allow selection of the required Month the Renewal is due.

For Quarterly only January, February and March are displayed to allow selection of the Month that the Quarter starts in.

Assign Licence Type Dimension Maintenance Form

The Assign Licence Type Dimension Maintenance form is designed to allow Licence Type Dimensions to be linked to the particular Licence Type.



Assign Licence Type Dimension Maintenance Form

Class Details Description
The Class Description Detail Field describes the name of the actual Class currently being used.

Licence Type Details Description
This field contains the description of the Class of Licence to which you are assigning A Licence Type.

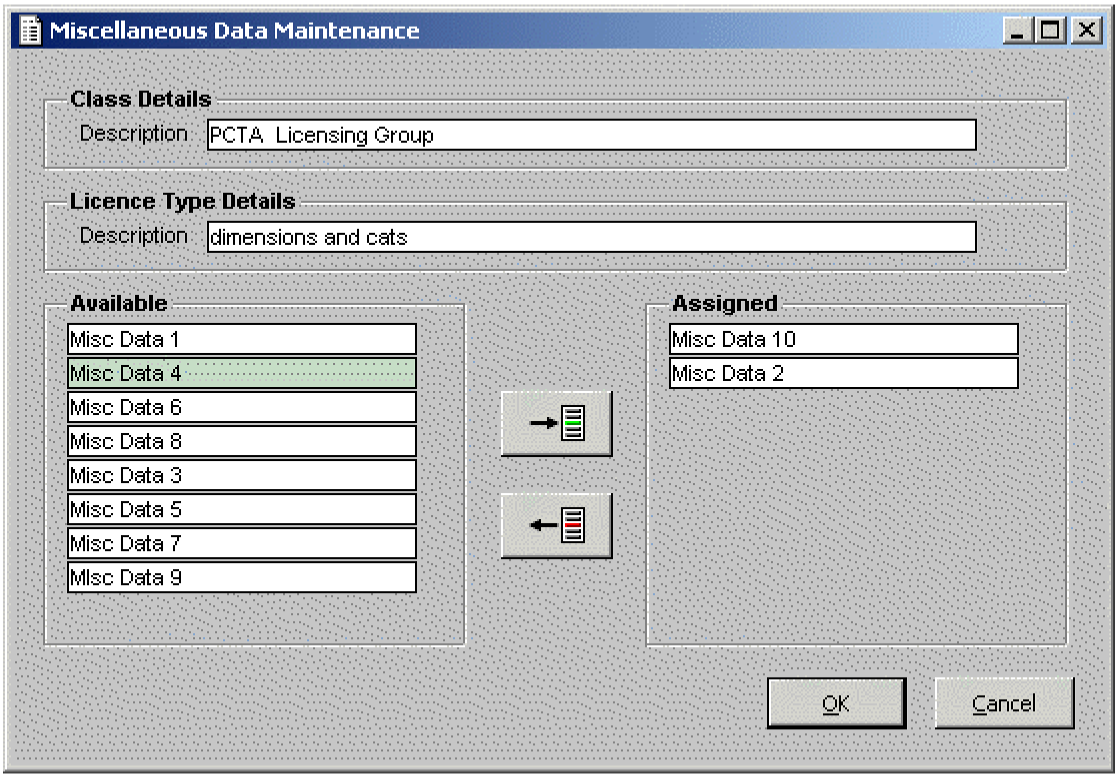
Available
This field lists the available Dimension Types that can be Assigned to this Licence Type.

Assigned
This field lists the Dimension Types that have been assigned to this Licence Type.
Dimension Types can be assigned or unassigned by highlighting the particular Dimension Type and clicking on either the Select or Remove buttons located in the centre of the form.
The Select Button has an arrow facing to the right hand side of the form and has a green stripe in the middle of it.
The Remove Button has an arrow facing to the left hand side of the form and has a red stripe in the middle of it.

Dimension Types that are available or Assigned may be repositioned using the up and down Move arrows located to the very right hand side of the form. The Dimension Type should be highlighted and then the appropriate up or down arrow selected to change the position of the Dimension Type in the list.

Miscellaneous Data Maintenance Form

The Miscellaneous Data Maintenance Form is designed to allow Miscellaneous Data to be linked to the particular Licence Type.



Miscellaneous Data Maintenance Form

Class Details Description
The Class Description Detail Field describes the name of the actual Class currently being used.

Licence Type Details - Description
This field contains the description of the Class of Licence to which you are assigning A Licence Type.

Available
This field lists the available Miscellaneous Data Types that can be Assigned to this Licence Type.

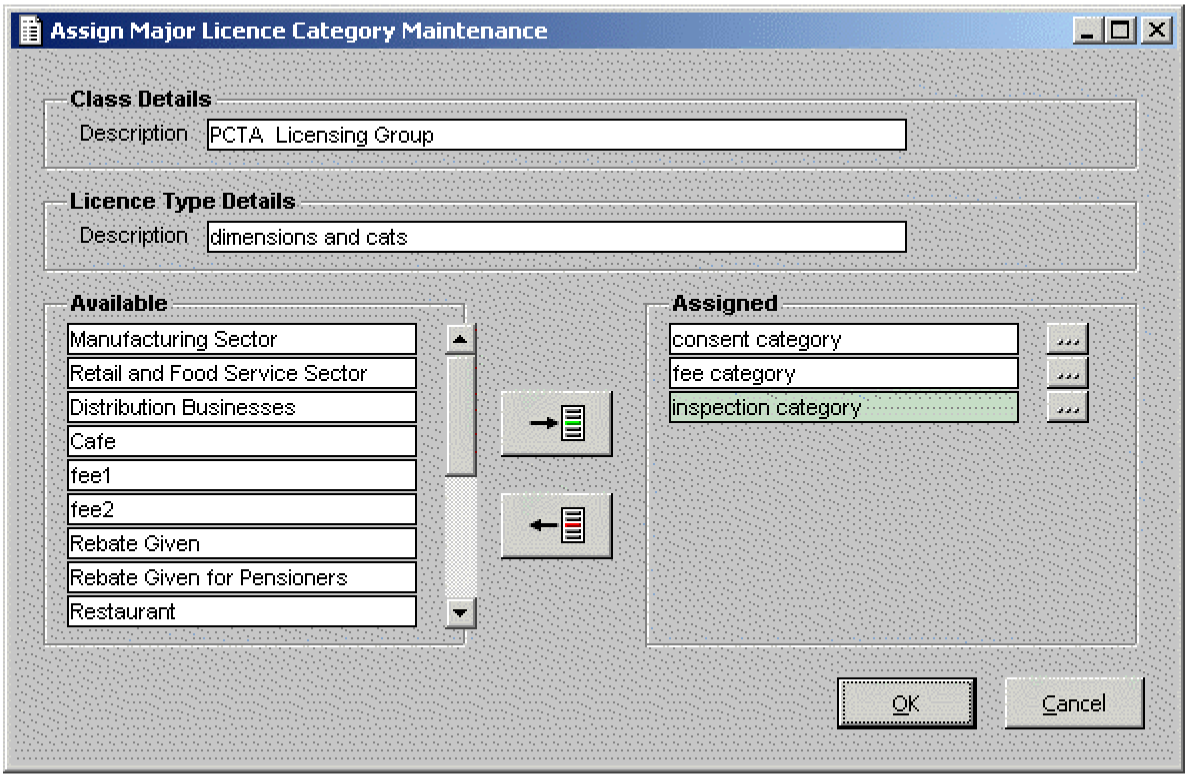
Assigned
This field lists the Miscellaneous Data Types that have been assigned to this Licence Type.
Miscellaneous Data Types can be assigned or unassigned by highlighting the particular Miscellaneous Data Type and clicking on either the Select or Remove buttons located in the centre of the form.
The Select Button has an arrow facing to the right hand side of the form and has a green stripe in the middle of it.

The Remove Button has an arrow facing to the left hand side of the form and has a red stripe in the middle of it.

Miscellaneous Data Types that are available or Assigned may be repositioned using the up and down Move arrows located to the very right hand side of the form. The Miscellaneous Data Type should be highlighted and then the appropriate up or down arrow selected to change the position of the Miscellaneous Data Type in the list.

Assign Major Licence Category Maintenance Form

The Assign Major Licence Category Maintenance Form is designed to allow Major Licence Categories to be linked to the particular Licence Type.



Assign Major Licence Category Maintenance Form

Class Details - Description

The Class Description Detail Field describes the name of the actual Class currently being used.

Licence Type Details - Description

This field contains the description of the Class of Licence to which you are assigning A Licence Type.

Available

This field lists the available Major Licence Categories that can be Assigned to this Licence Type.

Assigned

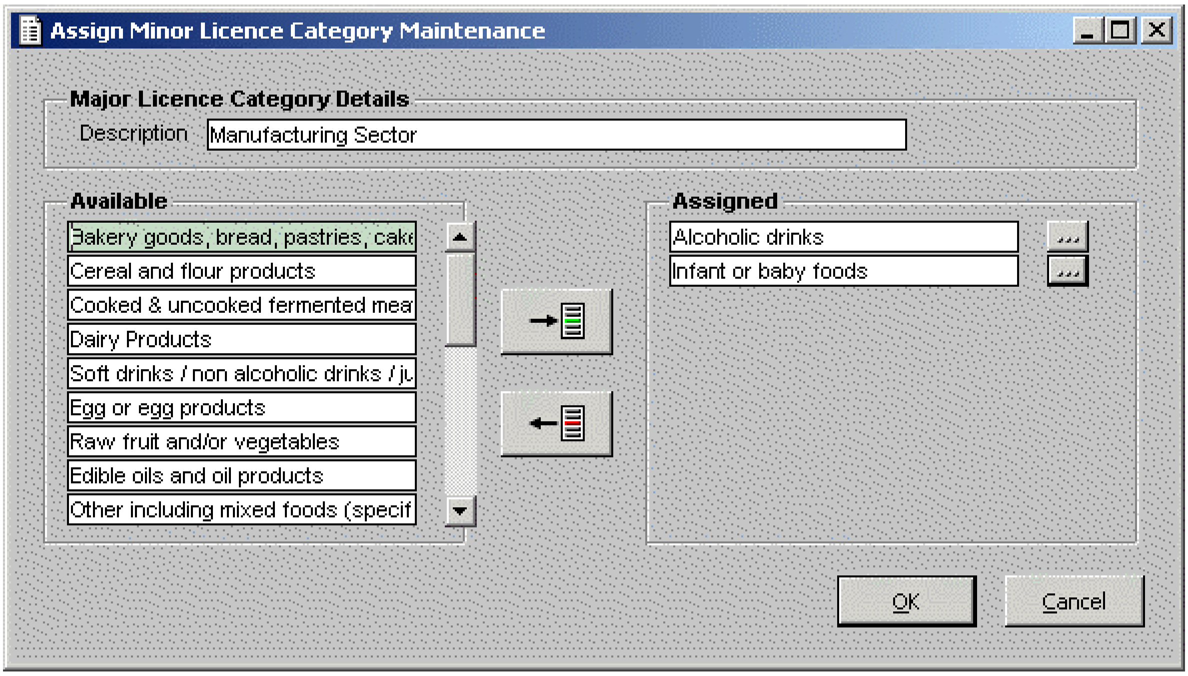
This field lists the Major Licence Categories that have been assigned to this Licence Type.
Major Licence Categories can be assigned or unassigned by highlighting the particular Major Category and clicking on either the Select or Remove buttons located in the centre of the form.
The Select Button has an arrow facing to the right hand side of the form and has a green stripe in the middle of it.
The Remove Button has an arrow facing to the left hand side of the form and has a red stripe in the middle of it.

Minor Category Detail Button

If only certain Minor Categories for the Major Category are required then selecting this Detail allows the User to assign the Minor Categories that are to be used.

Assign Minor Licence Category Maintenance Form

The Assign Minor Licence Category Maintenance Form is designed to allow Minor Licence Categories to be assigned for the Major Category that has been linked to the particular Licence Type.



Assign Minor Licence Category Maintenance Form

Major Licence Category Details - Description
This field contains the description of the Major Licence Category to which you are assigning Minor Categories.

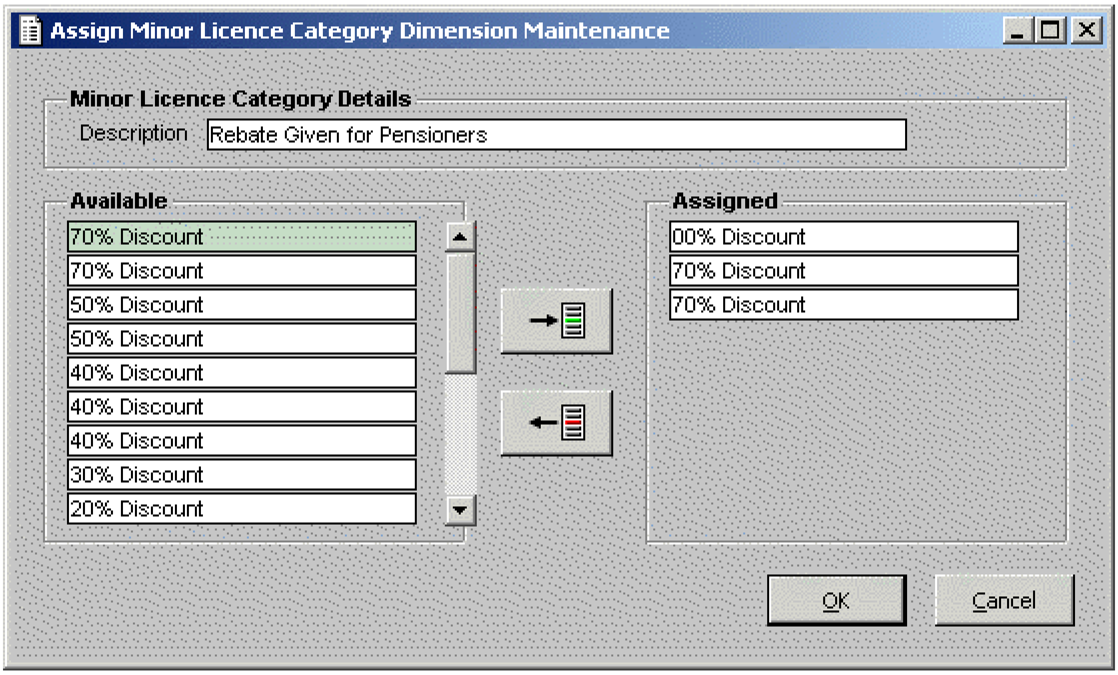
Available
This field lists the available Minor Licence Categories that can be Assigned to this Major Licence Category.

Assigned
This field lists the Minor Licence Categories that have been assigned to this Major Licence Category. Minor Licence Categories can be assigned or unassigned by highlighting the particular Minor Category and clicking on either the Select or Remove buttons located in the centre of the form.
The Select Button has an arrow facing to the right hand side of the form and has a green stripe in the middle of it.
The Remove Button has an arrow facing to the left hand side of the form and has a red stripe in the middle of it.

Minor Licence Category Dimension Detail Button
If only certain Minor Licence Category Dimensions for the Minor Licence Category are required then selecting this Detail allows the User to assign the Minor Categories Dimensions that are to be used.

Assign Minor Licence Category Dimension Maintenance Form

The Assign Minor Licence Category Dimension Maintenance Form is designed to allow Minor Licence Category Dimensions to be assigned for the Minor Category that has been linked to the particular Licence Type.



Assign Minor Licence Category Dimension Maintenance Form

Minor Licence Category Details - Description
This field contains the description of the Minor Licence Category to which you are assigning Minor Category Dimensions.

Available
This field lists the available Minor Licence Category Dimensions that can be Assigned to this Minor Licence Category.

Assigned
This field lists the Minor Licence Category Dimensions that have been assigned to this Minor Licence Category. Minor Licence Category Dimensions can be assigned or unassigned by highlighting the particular Minor Category Dimension and clicking on either the Select or Remove buttons located in the centre of the form.
The Select Button has an arrow facing to the right hand side of the form and has a green stripe in the middle of it.
The Remove Button has an arrow facing to the left hand side of the form and has a red stripe in the middle of it.

Memos

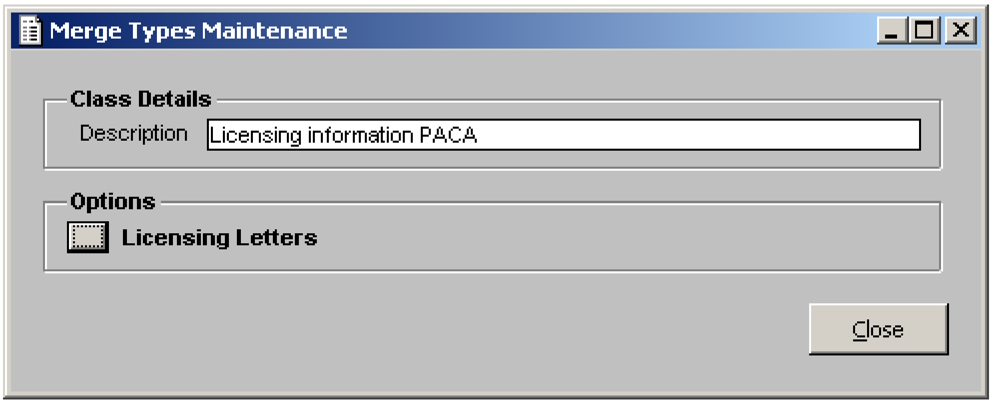
Memo Creation and Maintenance

The Memo System is available throughout the Licence System.
For details on how to establish Memos add and Maintain memos, refer to the Memo Manual.

Merge Types

Merge Type Maintenance Form

Merge Type Maintenance for each class enables the creation and maintenance of Letters.



Merge Type Maintenance Form

Class Details
This field is the Class Details Description.

Options
The option details out to a Merge Type Search Profile. The form is used to search on previously created Merge Types or for the creation of New Merge Types. The Creation and Maintenance of Merge Types is documented further in the Word Processing Guide.

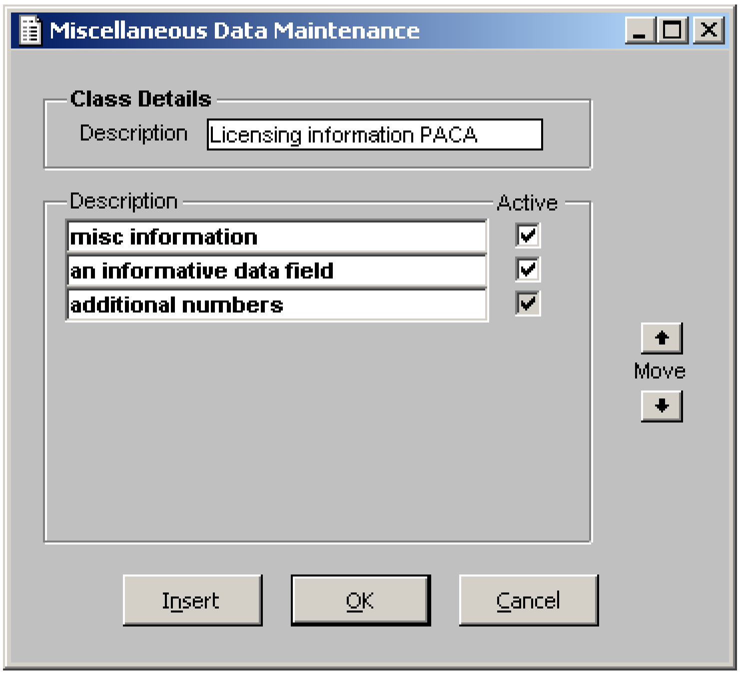
Miscellaneous Data

This parameter allows you to nominate free format text fields to be available to the Licence Class. This feature is provided to cater for data that you may require that has not been included in the system.

Miscellaneous Data Maintenance Form

This form enables the creation and maintenance of Miscellaneous Data fields. The fields may be sequenced to display in a nominated order by using the move up/down buttons located on the right hand side of the form.

The same sequencing is used within the Miscellaneous Data Maintenance form. If an entry is entered into the Miscellaneous Data Maintenance form then when the User reselects the option the data will be sequenced as per this form.



Miscellaneous Data Maintenance Form

Class Details
This field contains the description of the Class of Licence to which you are assigning Miscellaneous Data types.

This field is display only and may not be maintained.

Description
This field contains the label text for the Miscellaneous Data field.

This field is mandatory.

Active
If this box is checked on then the Miscellaneous Data type is available to the system.
If this box is checked off then the Miscellaneous Data type is no longer available to the system. Any existing Licensing with this Miscellaneous Data type will remain as entered. The Miscellaneous Data type will no longer be available for addition to Licensing.

Move Up/Down

Pressing these buttons will move the Miscellaneous Data Type that currently has focus either up or down the list. The order in which the Miscellaneous Data Types are presented on this form is the order in which they will be available for selection via the Pop Up during Licence Maintenance.

Name Roles

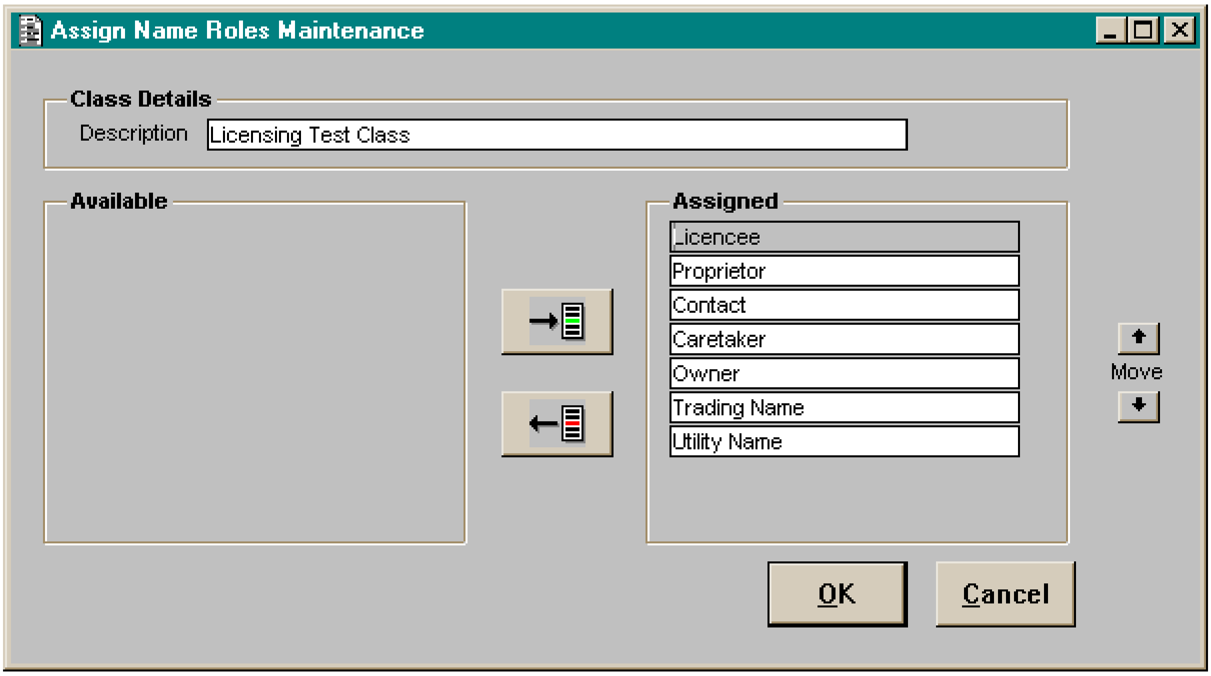
Assigning Name Roles

This function allows for the nomination of those name roles that will be made available to the Licence Class.

Standard Name roles have been assigned, however the facility exists to create other Name Roles for use within the Licence system.

Assign Name Role Maintenance Form

This form allows for the assigning of Name Roles to be available to the Licence Class.
The Applicant Name Role is mandatory.



Assign Name Role Maintenance Form

Class Details
This field contains the description of the Class of Licence to which you are assigning Name Roles.
This field is display only and may not be maintained.

Available
This list contains all available Licensing Name Roles.
To make a Name Role available to the Class click on the Name role and press the Select Button.
When selected the Name Role will be removed from this list and presented in the Assigned list.

Assigned
This list contains all Name Roles that have been made available to the Licence Class.
To remove a Name Role from the Class click on the Name role and press the Remove Button.
When removed the Name role will be removed from this list and presented in the Available list.
The Applicant Name Role must be assigned.

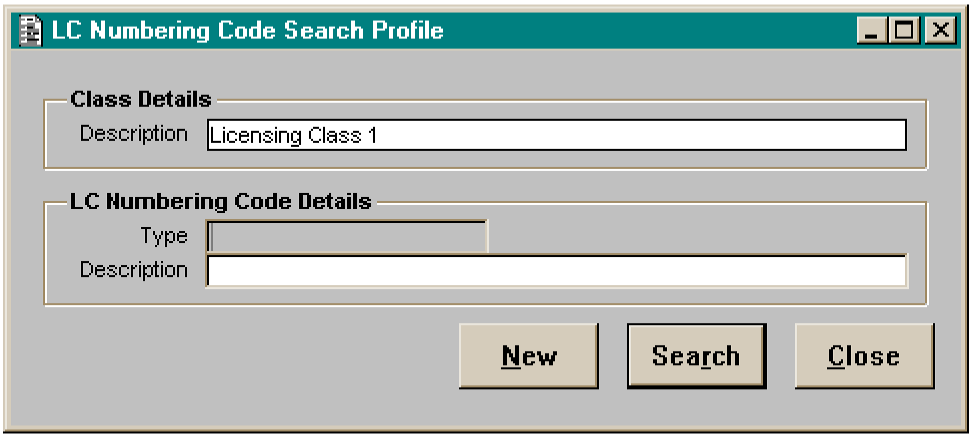
Move Up/Down

When pressed the Assigned Named Roles may be moved up or down the list to present in a logical order. The order nominated here will be presented to the User in Licence Maintenance.

Numbering Codes

Numbering Code Search Profile Form

The Numbering Code Search Profile allows the addition of a new Numbering Code to be used for the Class Selected.



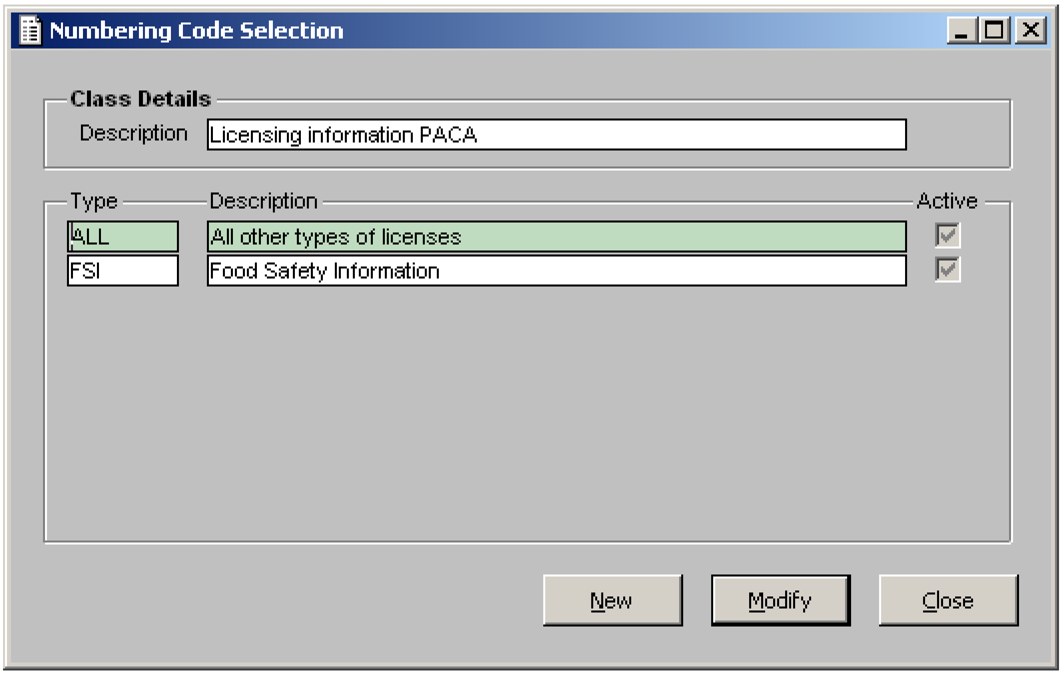
Numbering Code Search Profile Form

Class Details
The Class Details field is a full Description of the Particular Class Name that is currently being accessed.

Numbering Code Details
The Numbering Code Details Fields consist of a Type and Description. These fields may be used to enter data, either a Type or Description. The Search Button should then be click to proceed with the Search.
If more that one Numbering Code is available by Class the Numbering Code Selection Form will be displayed

Numbering Code Selection Form

The Numbering Code Selection Form Consists of the following fields:



Numbering Code Selection Form

Class Details
This field describes the Class selected.

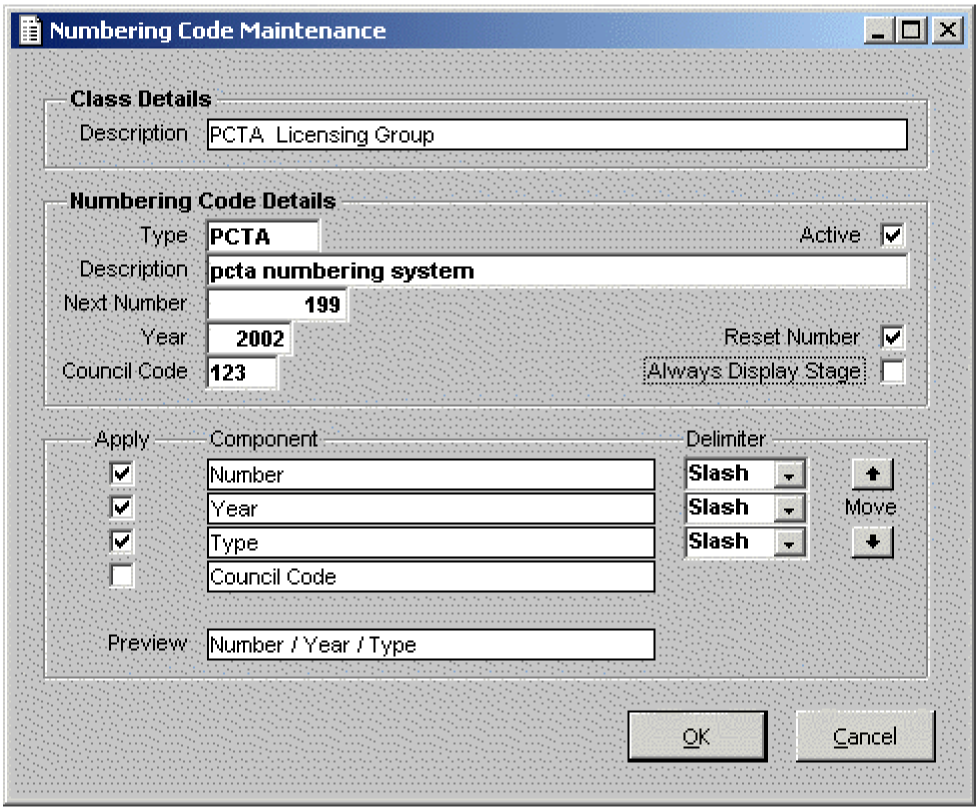
Type
This field shows the Code give to the Numbering Scheme

Description
This field details the full description given to the Numbering Code.

Active
This field if checked allows this Numbering Code to be used. If unchecked, this Numbering Code will not be available to Lodge Licensing against.

Numbering Code Maintenance Form

The Numbering Code Maintenance Form Detail the options to be set to use for the particular Class being accessed.



Numbering Code Maintenance Form

Class Details - Description

The Class Details Field is a full description of the Class currently being accessed.

Numbering Code Details – Type & Description

The Numbering Code and its Description are entered into these fields.

Numbering Code Details – Active

If the Active Box is checked on then this Numbering Code may be used. If the Active box is checked off, this Numbering Code may not be accessed.

Numbering Code Details – Next Number

The Next Number Field details the very next number a Licence will be allocated when it is lodged.

Numbering Code Details – Year

The Year Field details the year a Licence will be allocated when it is lodged. Note the Apply button for year must be selected for year to appear in the numbering code details.

Numbering Code Details – Council Code

The Council Code Field holds the actual number allocated to the Council

Numbering Code Details – Reset Number

The Reset Number Box if check on allows this particular Numbering Code to be Re-number when the Renumbering Function is run. This allows for a new numbering range usually at the end of each Calendar Year.

Numbering Code Details – Always Display Stage

This field is not used by Licensing.

Apply, Component and Delimiter – Number

These fields affect the way the Numbering Code is displayed.
If the Apply Field is checked on then each of the particular fields will display. If it is not checked on this will not be part of the Numbering Code.
The Components are made up of Number, Year, Type and Council Code.
The Delimiter Field describes how the Components will be separated.

Move Buttons are also available to Move the Sequence of the Components to how the Council wish the Numbering Code to appear.

Apply, Component and Delimiter – Year

These fields affect the way the Numbering Code is displayed.
If the Apply Field is checked on then each of the particular fields will display. If it is not checked on this will not be part of the Numbering Code.
The Components are made up of Number, Year, Type and Council Code.
The Delimiter Field describes how the Components will be separated.
Move Buttons are also available to Move the Sequence of the Components to how the Council wish the Numbering Code to appear.

Apply, Component and Delimiter - Type

These fields affect the way the Numbering Code is displayed.
If the Apply Field is checked on then each of the particular fields will display. If it is not checked on this will not be part of the Numbering Code.
The Components are made up of Number, Year, Type and Council Code.
The Delimiter Field describes how the Components will be separated.
Move Buttons are also available to Move the Sequence of the Components to how the Council wish the Numbering Code to appear.

Apply, Component and Delimiter – Council Code

These fields affect the way the Numbering Code is displayed.
If the Apply Field is checked on then each of the particular fields will display. If it is not checked on this will not be part of the Numbering Code.
The Components are made up of Number, Year, Type and Council Code.
The Delimiter Field describes how the Components will be separated.
Move Buttons are also available to Move the Sequence of the Components to how the Council wish the Numbering Code to appear.

Preview

A Preview Box is displayed to show how the selected Numbering Codes will display.

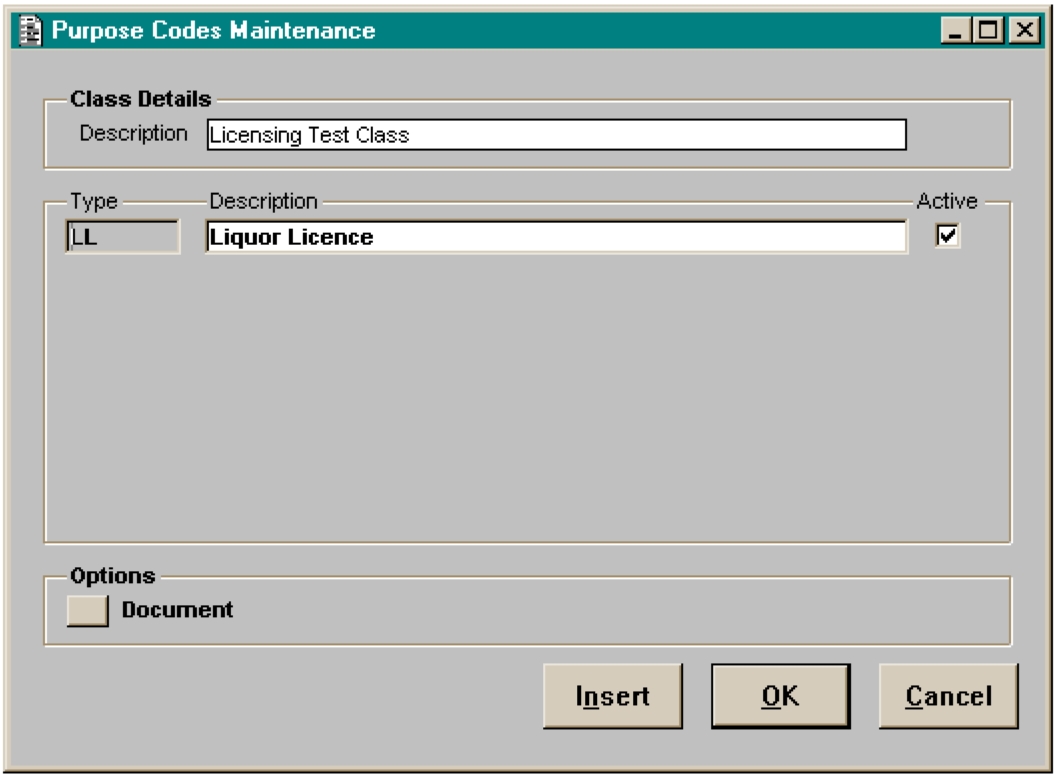
Purpose Codes

Purpose Codes may be assigned to a particular Licence to designate a particular kind of Licence.

A Purpose Code may have a document with information attached to it. The User creates a code and description for the Purpose Code, and clicks on the document button. The Word Processor used by the Council will automatically open for the User to add the required details.

Purpose Codes Maintenance Form

A Purpose Code may have a document with information attached to it. The User creates a code and description for the Purpose Code, and clicks on the document button. The Word Processor used by the Council will automatically open for the User to add the required details.



Purpose Codes Maintenance Form

Class Details - Description
This field details the name of the Licence Class chosen.

Type
This field allows the User to enter a specific Code that will be used to associated this Purpose Code.

Description
This field allows the User to enter a fuller description to associate to the Purpose Code.

Active
If this field is checked on, then the Purpose Code may be used. If unchecked it is classed as Inactive and therefore cannot be selected to add to a Licence.

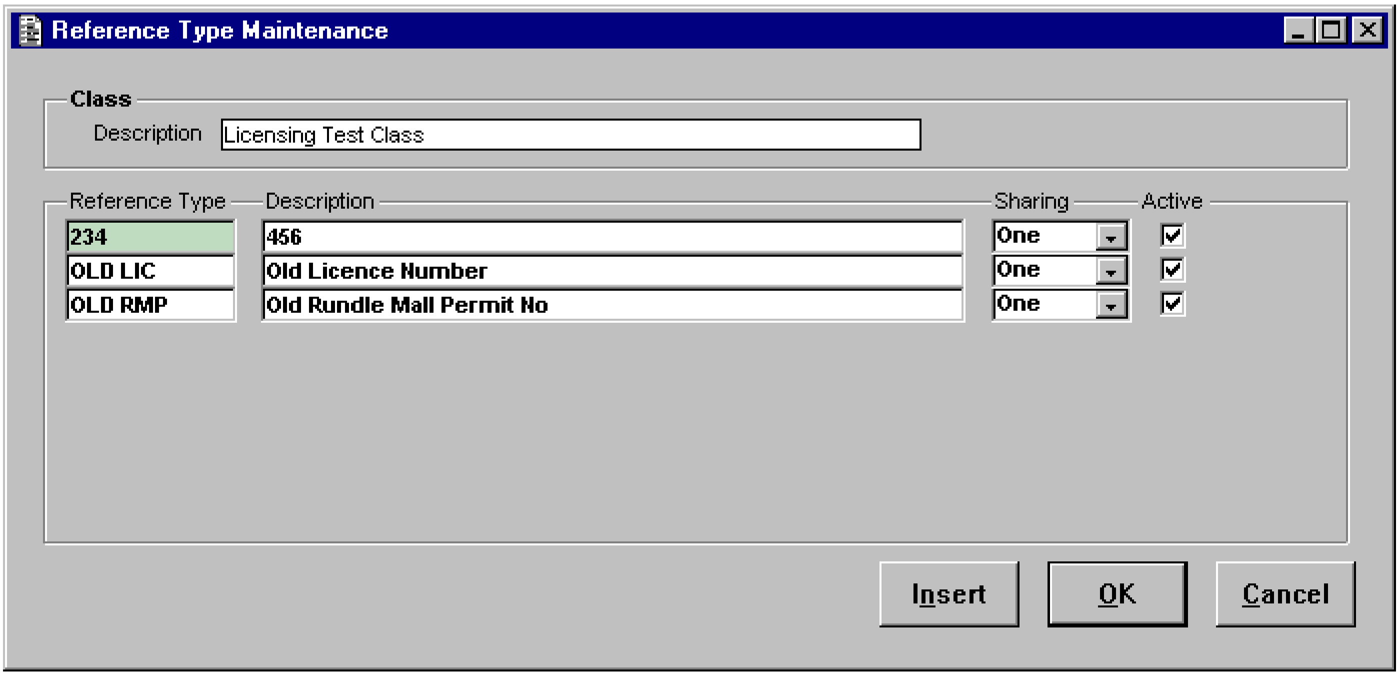
Options - Document
This button when clicked will automatically start up the word processor and allow the User to enter particular details to assign to the Purpose Code.

References

Reference Type Maintenance Form

This form is designed to allow the addition of References that may be linked to a Licence. These References can be used as a further means of identification and another Search Criteria for finding a Licence.

References should actually be created via the references option, but will be displayed in the Licensing System as follows;



Reference Type Maintenance Form

Class -Description
This field details the name of the Class chosen to add References to.

Reference Type
This field is the Code given to each Reference Type that is to be used within Licensing.

Description
This field is a full description of each Code.

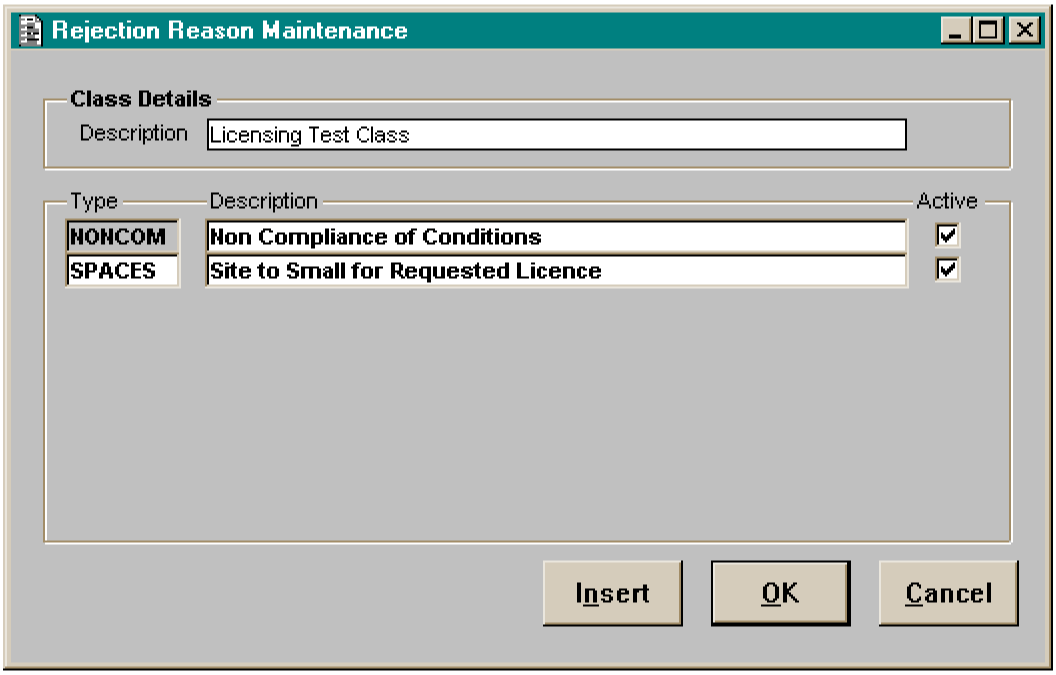
Sharing
This field displays the value that will decide if a Reference may be shared with only one Licence or Many Licensing. If the option is set to One, then this Reference may only be added against one Licence. If the option is set to Many, then this Reference may be added against multiple Licensing.

Active
This field when checked allows the Reference to selected. If it is checked off, then the Reference Type will not be available for selection.

Rejection Reason

Rejection Reason Maintenance Form

This form is used to create and maintain rejection reason descriptions. This parameter is used to assign Rejection Reason descriptions to a Decision record that is of a “Rejected” type.



Rejection Reason Maintenance Form

Class Details
This field contains the description of the Class of Licence to which you are assigning Rejection Reasons. This field is display only and may not be maintained.

Type
This field contains the Rejection Reason type code. Up to six alphanumeric characters may be entered. This field is mandatory.

Description
This field contains the Rejection Reason description.
This field is mandatory.

Active
If this box is checked on then the Rejection Reason is available to the system.

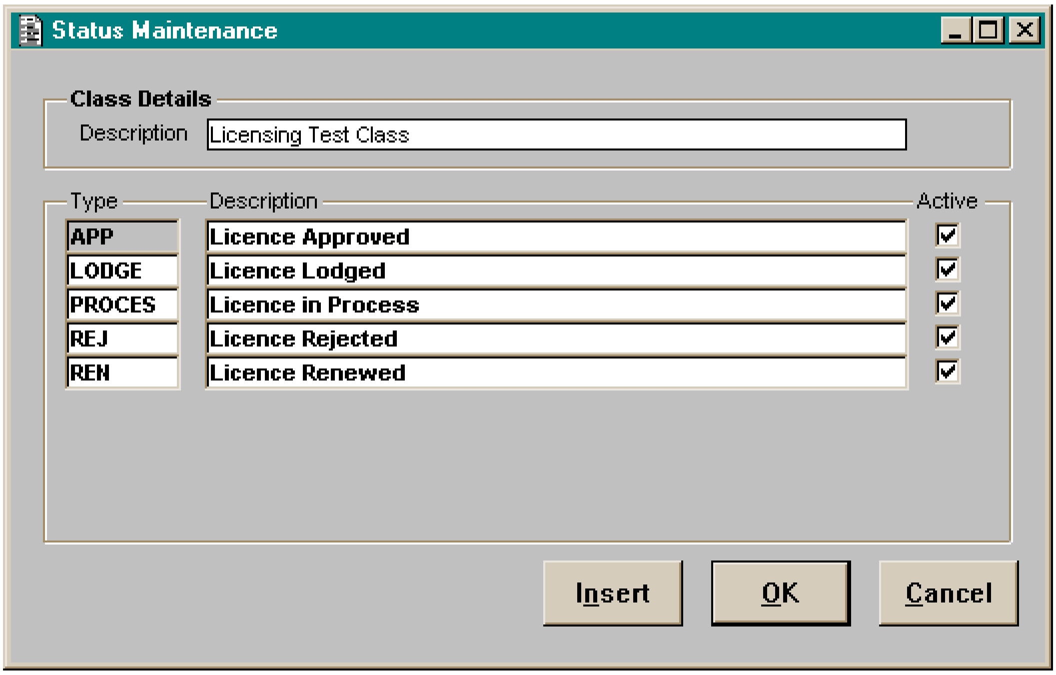
If this box is checked off then the Rejection Reason is no longer available to the system. Any existing decisions with this Rejection Reason will remain as entered. The Rejection Reason will no longer be available for addition to decisions.

Status

This parameter is used to reflect the current status of a Licence. The status code on a Licence may be maintained manually or assigned automatically via task processing.

Status Parameter Maintenance Form

This form is used to create and maintain the Status Parameters.



- Status Maintenance

Class Details
This field contains the description of the Class of Licence to which you are assigning Status Codes.

This field is display only and may not be maintained.

Type
This field contains the type code you wish to assign to the Status Code. It may be up to six alphanumeric characters long.

This field is mandatory.

Description
This field contains the description for the Status Code.

This field is mandatory.

Active
If this box is checked on, the Status Code will be available for use within the Licensing System.

If this box is checked off the Status Code will no longer be available for assigning to other parameters or Licensing. Any existing records that use this Status Code will remain accessible.

Note: If you make a Status Code inactive it is recommended that you change all other parameters that use this Status Code. Eg. Utility parameter.

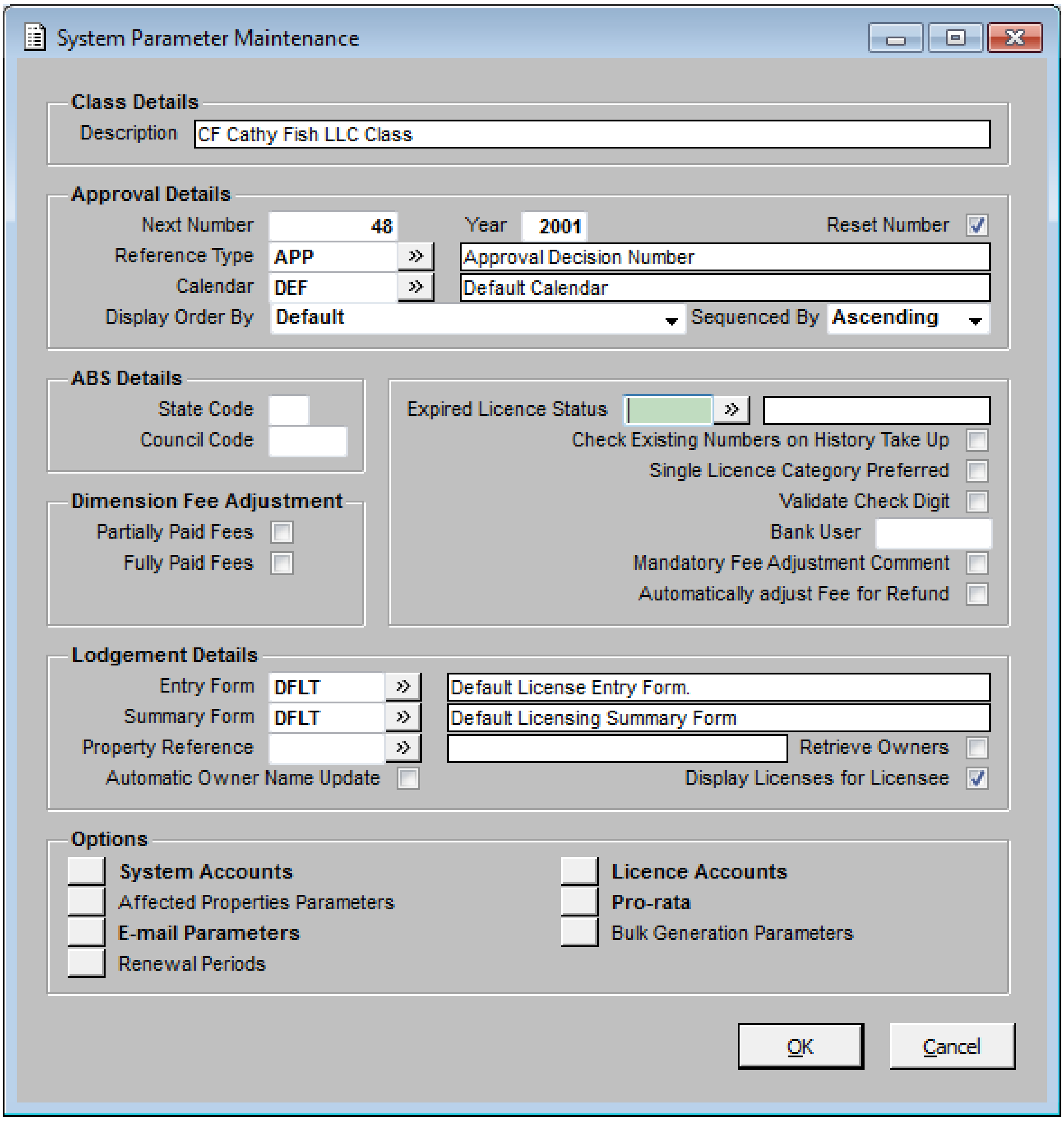
System Parameter

This parameter controls certain aspects of the system at its highest level. Settings assigned here affect the Licence Class as a whole.

System Parameter Maintenance Form

This form is used to set system wide Class attributes.

NOTE: - The Bulk Generation Parameters Options is controlled by Authorised Functions and will only display if the appropriate Authorisation Code is active.



System Parameter Maintenance Form

Class Details

This field contains the description of the Class of Licence to which you are assigning system settings.

This field is display only and may not be maintained.

Approval Details - Next Number
This field contains the next approval number that will be assigned for a Licence approval decision. This field is used in conjunction with the Year.

Approval Details - Year
This field contains the year that will be assigned for a Licence approval decision. This field is used in conjunction with the Next Number.

When the reset number batch process is run this field will be incremented by one (1). Eg. 1998 becomes 1999.

Approval Details - Reset Number
If this field is checked on then when the reset number batch process is run the Next Number field will be reset to one (1).

If this field is checked off then when the reset number batch process is run the Next Number field will not be reset to one (1).

The reset number batch process will always increment the Year field by one (1).

Approval Details - Reference Type

If the Licence approval decision number is required to be updated as a Reference this field should contain the Reference Type established for the approval decision number. Select a valid Reference Type from the Pop Up form.

Establishing the Approval Number as a Reference Type provides the ability to search for a Licence with the given number.

The Reference Type nominated here will automatically be updated with the approval number when the Licence approval decision is entered.

Approval Details – Calendar

A differenct Calendar is able to be used for each Licensing Class if required. Where this field is left blank then the Default Calendar defined for Licensing within the System Application Code Maintenance area will be used. By entering in a Calendar, all Dates in the Licensing Class will display and calculate their dates based on this Calendar.

Additionally if Workflow is being used within the Licensing Class then this Calendar is used for any date processing of Licensing Tasks instead of the default Calendar defined for Workflow.

Approval Details – Display Order By
The Display Order By field is used to set the default Display Order to be used when searching for a Licence. This default will then be displayed on the Licensing Search Profile Form but then can be changed by the User to another sequence if required. The Options available from the dropdown are:-

- Default (current display)
- Lodgement Date, Year, Number and Type
- Expiry Date, Year, Number and Type
- Number, Year, Lodgement Date and Type
- Number, Year, Expiry Date and Type
- Year, Number, Lodgement Date and Type
- Year, Number, Expiry Date and Type

Approval Details – Sequenced By
The Sequnced By field is used to nominate whether the Licences are displayed in Ascending or Descending Sequence. This default will then be displayed on the Licensing Search Profile Form but then can be changed by the User to another sequence if required. The Options available from the dropdown are:-

- Ascending
- Descending

ABS Details - State Code / Council

The State Code field contains the numeric code assigned to each State by the Australian Bureau of Statistics (ABS). The contents of this field are required for ABS returns.

The Council field contains the number assigned to your Council by the Australian Bureau of Statistics (ABS). The contents of this field are required for ABS returns. As ABS returns are not completed for Licences this field does not have to be entered.

Dimension Fee Adjustment

These checkboxes allow the the ability to amend fees based on changes to a dimension where the intital fees that were linked to the dimension have been partially or fully paid. Set ON they allow for the fees to be amended, Set OFF only dimensions will be amended.

Expired Licence Status

The new 'Expired Licence Status' parameter has been added to the System Parameter Maintenance form. This allows the user to nominate the Licence Status that will be loaded to the Licence when a Licence for the Class is to be expired automatically due to a change in an Animal's Status or Owner or Location.

Check Existing Numbers On History Take Up

This check box controls the checking of Existing Numbers when entering in Licences via the History Take Up Menu.

If this is set on, when Licences of the Same Number exist as that being entered in History Take Up, the User will be presented with a summary form where there is only one match or a selection form if there are multiple matches. The User is then able to use the display button to view the Licence if required. When the Quit button is selected they are returned back to the History Take Up Option and can either continue with the process or cancel out if the entry is not required.

Single Development Category Preferred

If the Single Development Category Preferred parameter is set on then a quick, single Development Category can be entered. This process is also applied for Minor and Dimension maintenance.

An additional Options Button allows Users to go directly to the Dimension Entry so that where they may have a single Major Category but possibly several Minor Categories and therefore multiple Dimension values, rather than having to access each Minor Category to add the details, the User can select the Dimension Option button and display all Dimensions that have been assigned for quick entry of them.

If the 'Single Development Category Preferred' flag is not set then the User can select multiple Majors, Minors aznd Dimensions during Development Category Maintenance.

Validate Check Digit/Bank User ID

The Application / Licence Key (Technical Primary Key) is used as the External Reference. The Key is displayed on the Applications and Licensing data screens.

A Check Digit can be used with the External Reference, which is validated by Pathway Receipting, ePathway Payments and External Receipt Processing.

The Validate Check Digit function is Class based. Two new options are available via the Class System Parameters option, this enables the setup for Check Digit validation and the ability to specify the Bank User Code. If the Check Digit Validation is ON, then you are required to run the Update Check Digit Batch process for the selected Class(s). The Check Digit will then be displayed next to the Technical Primary key for the Application/License on the Applications/Licensing Data screen.

The numeric Bank User Id is optional, but can be used in the check digit calculation, if no number is entered zero is used.

Mandatory Fee Adjustment Comment

If this checkbox is ON then the Comment on a Fee Adjustment is mandatory.

If this checkbox is OFF then the Comment on a Fee Adjustment is optional.

Automatically Adjust Fee for Refund
If this checkbox is ON then when a paid fee is Refunded Pathway will write a corresponding transaction to the fee to ensure that the fee balance remains at zero.

If this checkbox is OFF then when a paid fee is Refunded Pathway will write the Refund transaction only, resulting in the Fee becoming outstanding.

Lodgement Details - Licence Entry Form

This field contains the name of the form you wish to use for the Licence Entry process.

Lodgement Details – Summary Form

This field contains the name of the form you wish to use as the Licence Summary. As this is a Standard form at present the “DFLT’ form must be selected.

Property reference
If your council stores the link to other properties by recording a Primary key (TPK) of the property on a Reference (for ownership retrieval in Entry and Affected Property entry), then you can specify that reference type here. This way it will be checked when the ‘Retrieve Owners’ flag is checked on. The TPK specified against this reference type on the property will then be used to ascertain which property, and therefore which ownership should be used.

Retrieve owners
If there is no Owner on the property when entering a Licence, setting this flag will determine if the owner is to be retrieved from within the Parent/Grand-parent structure for the property. It can also be used in conjunction with the Property reference to also retrieve owners from different properties.

Automatic Owner Name Update
When the ‘Automatic Owner Name Update’ is set ‘On’ property owner names will be updated to the current owner(s) of the property. The update process is triggered when the User enters the Licensing Names Maintenance form.

If there are no Owners listed against a Property then no updates are performed. This allows for the addition of Owner Names to Licences in cases where the Property Owner information has not yet been entered as in ‘Out of Council’ properties.

When the ‘Automatic Owner Name Update’ check box is ‘Off’ then no updates of Owner Names are performed.

Display Licences for Licencee
When the ‘Display Licences for Licencee’ is set ‘On’ all previous Licences for this Licencee will be displayed when entering a Licencee Name in Licence Entry. If set ‘Off’ then Licences for the Licencee for this Class will not be displayed.

At Licence Entry if all Classes have this flag set ‘Off’ Users will not be notified of other Licences for the same name. Where some Classes are set ‘On’ then only Licences for those Classes with the same Licencee will be displayed.

When creating a new Licence Class then this parameter is automatically set ‘On’. If this is not required then the User will need to set the parameter ‘Off’.

System Accounts Button
Selecting this button will present the System Accounts Maintenance Form.

Licence Accounts Button
Selecting this button will present the Licence Accounts Maintenance Form.

Pro-rata Button
Selecting this button will present the Pro-Rata Maintenance Form.

Options – Affected Properties Parameter

Selecting this option will display the Parameter settings for Affect Properties allowing the setting of default information for this process if required.

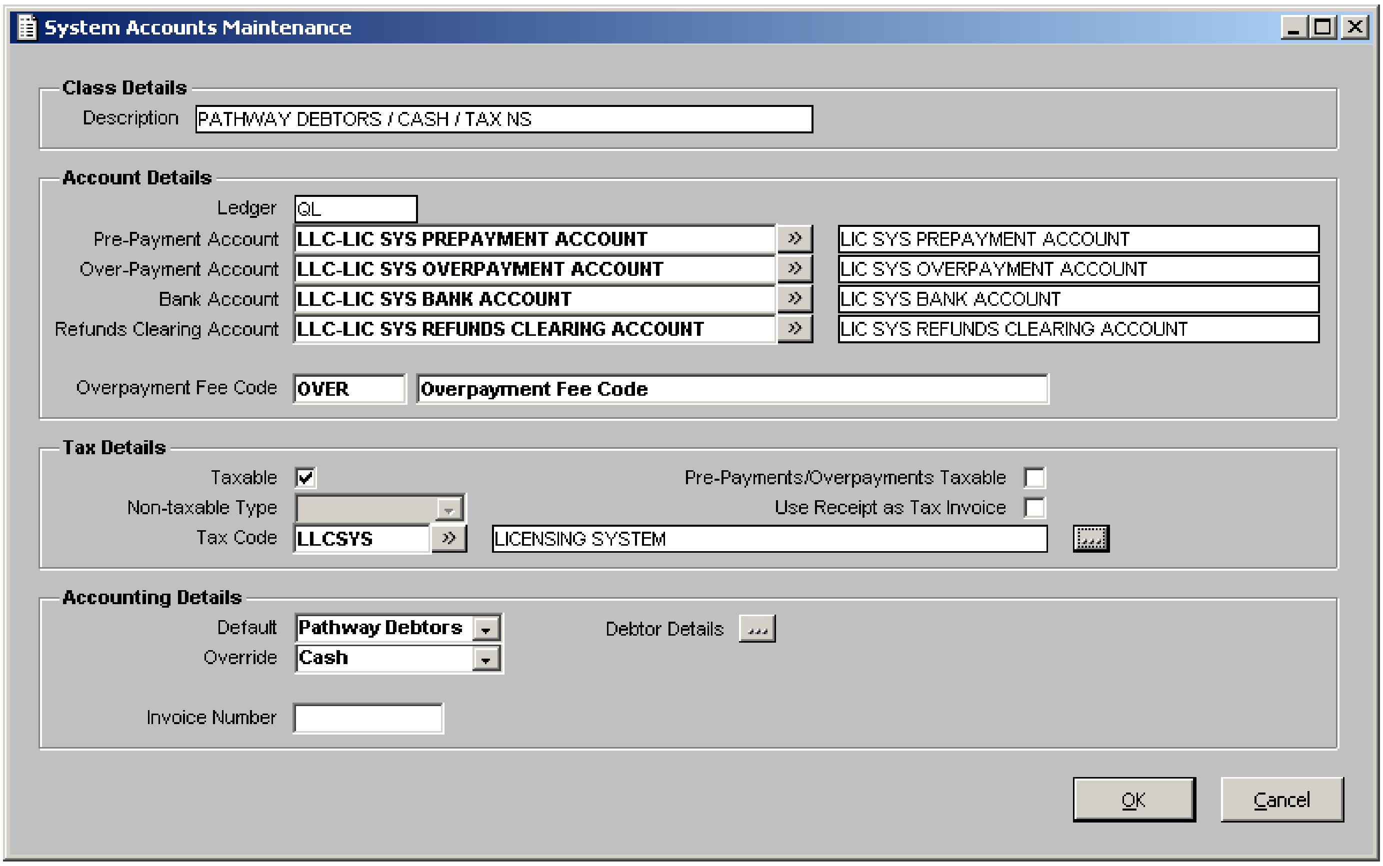
Options – Bulk Generation Parameters
Selecting the Bulk Generation Parameters option allows for the setting of the Merge Document to be used in the generation of the Invoices and the selection of the Application Types and Status that are to be processed as part of Bulk Update processing.

NOTE: - This function is an authorised function and therefore will not display if the authorisation is not active.

System Accounts Maintenance Form

This form defines the default General Ledger Accounts for the Licence Class. These accounts may be overridden at the individual fee code level.
Where no overrides at the fee code exist then the General Ledger Accounts nominated here will be used.

Please discuss the setting up of these Accounts with someone in the Finance Department to ensure correct accounts are used.



System Accounts Maintenance Form

Class Details - Description
This field contains the description of the Class of Licence to which you are assigning General Ledger Accounts

This field is display only and may not be maintained.

Account Details - Ledger
The Ledger assocated to the Accounts that have been entered into the Account fields is displayed in this field.

Account Details –Accounts

These fields contain the ledger accounts to which all pre-payment and over-payment financial transactions will be posted.

Overpayment Fee Code

The Overpayment Fee Code is used when a payment is allocated to a Licence and the amount that has been allocated is greater than what is outstanding. The remaining money is put against the Overpayment Fee Code until it is possible for the Overpayment to be allocated to new fees for the Licence.

Taxable

If this field is checked on then the Class will be Taxable. The Tax Code is entered in the next field.

Pre-Payments/Overpayments Taxable

If this field is checked on then any Pre-payments or Overpayments will be classed as Taxable and therefore the appropriate general ledger tax transaction will take place.

If checked off then Pre-payments or Overpayments will be classed as Non-Taxable and no posting to Tax accounts will occur.

Tax Code

This field contains the Tax Code that is applicable to the Application Class. Enter a valid code or select from the Tax Code Pop Up form.

Tax Code Maintenance Detail Button

Once a Tax Code has been entered then the Detail Button can be selected to display the Accounts that will be used for processing of Tax.

Accounting Details - Default

The Default Accounting Method is a Mandatory field. The Default is used as the default for each License record, however the Override Accounting Method (if defined) will allow an override to this value on any License.

The Default Options available are :-

- Accrual
- Cash
- Pathway Debtors
- COM Debtors

Where the Default is set to Pathway Debtors then the financial transactions for the License will be generated and passed into the Pathway Debtors Module for processing of payments.

NOTE:- When the Account Method for a Licence has been set to Pathway Debtors then it is necessary for any Receipts to be raised against the Debtor Invoice and not against the Licence. These Receipts will need to be created as DLC type Receipts with the Payment Reference being nominated in the Qualifier field. It will not be possible to receipt directly to the Licence.

When the Account Method for a Licence has been set to COM Debtors then no Receipting should occur for the Licence within Pathway.

Accounting Details – Debtor Details

When the Accounting Method has been defined as using Pathway Debtors then the Debtor Details Button is displayed for additional information to be entered to assist with the interfacing of transactions from Licensing into Debtors.

Accounting Details - Override

The Override Accounting Method is an Optional field. The Override (if defined) can be used as an override for an Licence record.

The Override Options available are :-

- None
- Accrual
- Cash
- Pathway Debtors

- COM Debtors

Whatever value has been set for the Default Method will not be available in this dropdown option. If the Override Method is the same as the Default then this field should be set to None.

NOTE:- When the Account Method for a Licence has been set to Pathway Debtors then it is necessary for any Receipts to be raised against the Debtor Invoice and not against the Licence. These Receipts will need to be created as DLC type Receipts with the Payment Reference being nominated in the Qualifier field. It will not be possible to receipt directly to the Licence.

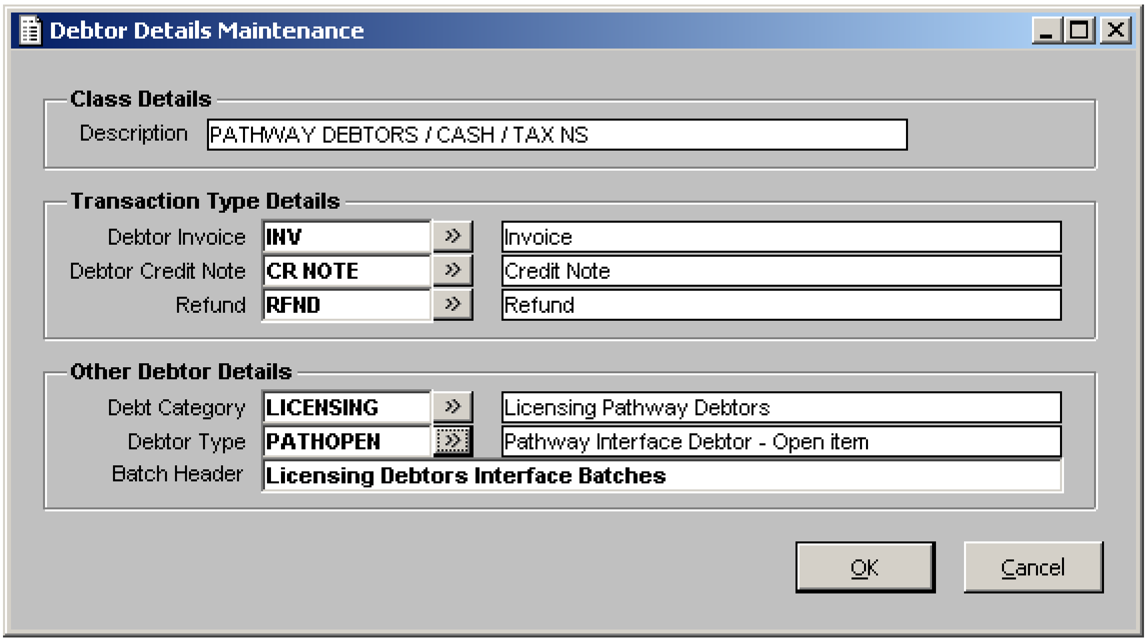
When the Account Method for a Licence has been set to COM Debtors then no Receipting should occur for the Licence within Pathway.

Module Name
Where the Account Method has been defined as COM Debtors then the Module Name field is displayed to allow entry of the Name of the interfacing Module that is being used for the COM Debtors.

Invoice Number
The Invoice Number field is use to allocate an Invoice Number to an Invoice when generated for a non Pathway Debtor. This is incremented whenever an Invoice is generated for a none Pathway Debtor Fee. Pathway Debtor Invoice numbers are allocated from the Pathway Debtors module.

Debtor Details Maintenance Form

The Debtor Details Maintenance form allows the selection and defining of the Transaction Types to be used for Invoices and Credit Notes when transactions are interfaced into the Pathway Debtors Module.



Debtor Details Maintenance Form

Class Details - Description
This field contains the description of the Class selected.

Transaction Type Details – Debtor Invoice

The Debtor Transaction Type to be used for the Invoice is to be entered into this field. If the Type is not known then the Pop Up can be selected to display a list of valid Debtor Transaction Types.

Transaction Type Details – Debtor Credit Note

The Debtor Transaction Type to be used for the Credit Note is to be entered into this field. If the Type is not known then the Pop Up can be selected to display a list of valid Debtor Transaction Types.

Transaction Type Details - Refund

The Debtor Transaction Type to be used for the Refund is to be entered into this field. If the Type is not known then the Pop Up can be selected to display a list of valid Debtor Transaction Types.

Other Debtor Details – Debt Category

The Debt Category to be used for the Debtor Details is defined in this field. If the Debt Category Code is not known then the Pop Up can be selected to display a list of valid Debt Categories.

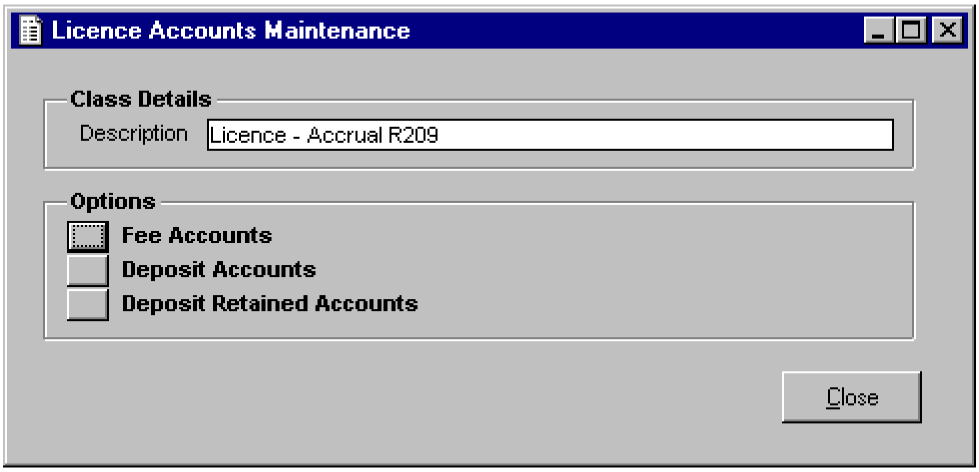
Other Debtor Details – Debtor Type

The Debtor Type is to be used for the automatic creation of a Debtor. This Debtor Type will be used to create the Debtor. If this field is left blank then the User will have to manual create the Debtor and select the Debtor Number to be used.

Other Debtor Details – Batch Header

Enter in the information that is to be included in the Batch Header of the batch that is created to generate the transactions in Debtors from Licensing.

Licence Accounts Maintenance Form



Licence Accounts Maintenance Form

Class Details – Description

This field contains the description of the Class of Licence to which you are assigning Licence Accounts

This field is display only and may not be maintained.

Options – Fee Accounts

Selecting the Fee Accounts Option Button will display the Deposit Accounts Maintenance Form.

Options – Deposit Accounts

Selecting the Deposit Accounts Option Button will display the Deposit Accounts Maintenance Form.

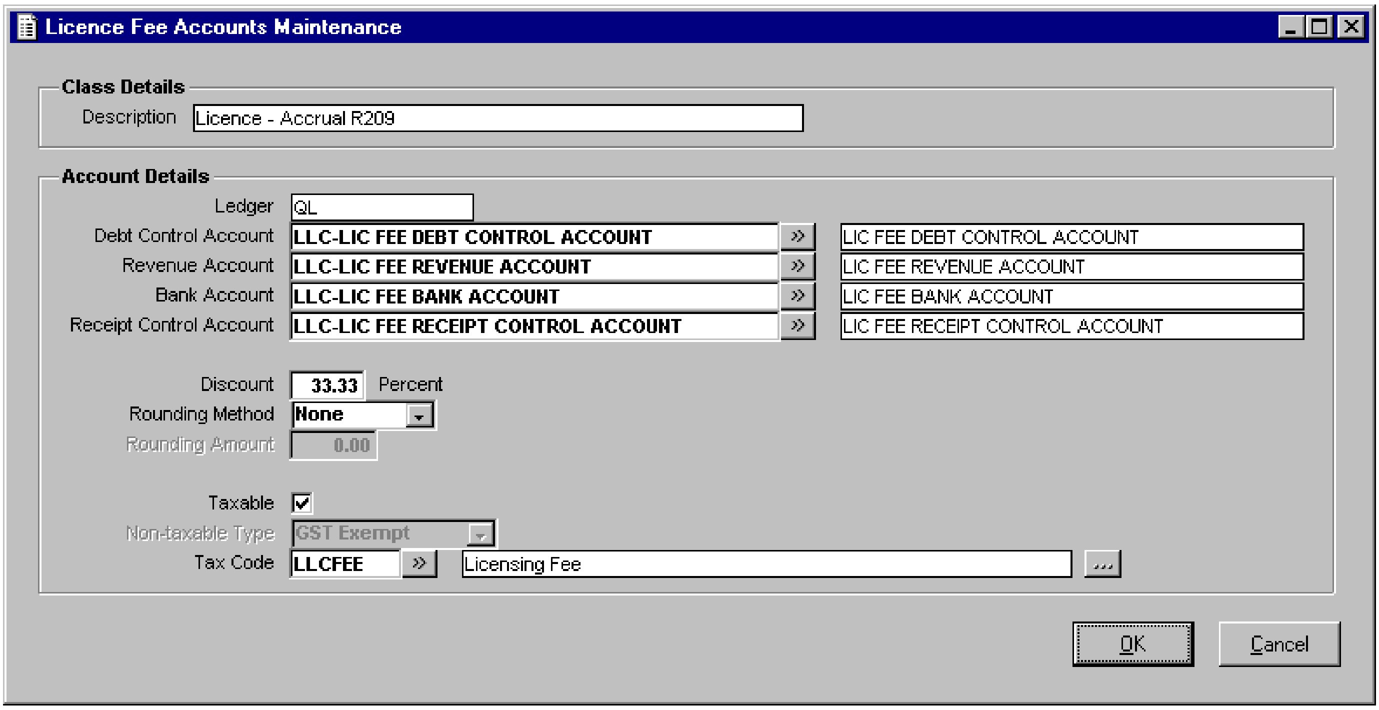
Options – Deposit Retained Accounts

Selecting the Deposit Retained Accounts Option Button will display the Deposit Retained Accounts Maintenance Form.

Licence Accounts Maintenance Form

This form defines the Licence General Ledger Accounts for the Licence Class. These accounts may be overridden at the individual fee code level. These Accounts would normally be set up after liaison with your Accounts Department.

Where no overrides at the fee code exist then the General Ledger Accounts nominated here will be used.



Licence Fee Accounts Maintenance Form

Class Details

This field contains the description of the Class of Licence to which you are assigning Licence Accounts

This field is display only and may not be maintained.

Ledger

This field contains the ledger code to which all financial transactions will be posted. Only one ledger code per Licence class may be used.

Accounts

<u>Debt Control Account</u>

This field contains the ledger account to which all debit financial transactions will be posted. The Field consists of 3 parts, an Account Number, Pop Up Button and the Account Description. The Pop Button for this and other Accounts listed below detail out to the Financial Account Pop Up Form for Account Selection.

<u>Revenue Account</u>

This field contains the ledger account to which all credit financial transactions will be posted. The Field consists of 3 parts, an Account Number, Pop Up Button and the Account Description. The Pop Button for this and other Accounts listed below detail out to the Financial Account Pop Up Form for Account Selection.

<u>Bank Account</u>

This is normally the standard bank account for the Council.

<u>Receipt Control Account</u>

This field contains the ledger account to which all Receipt Debit transactions will be posted. The Field consists of 3 parts, an Account Number, Pop Up Button and the Account Description. The Pop Button for this and other Accounts listed below detail out to the Financial Account Pop Up Form for Account Selection.

<u>Refunds Clearing Account</u>

This field contains the ledger account to which all Refund transactions will be posted. The Field consists of 3 parts, an Account Number, Pop Up Button and the Account Description. The Pop Button for this and other Accounts listed below detail out to the Financial Account Pop Up Form for Account Selection.
If this field is checked on then the Class will be Taxable. The Tax Code is entered in the next field.

Discount

The Discount allows the User to enter a Discount amount to be applied to all Fees flagged as Discountable (see Fee Parameter Maintenance).

The default Discount percentage will be 0%.

Rounding Method
The Rounding Method allows the User to select from the options of Up, Down, None and Closest. The Drop down box can be clicked and a Method chosen.

Rounding Amount
The dollar or cents value needs to be entered in this field for the Rounding Method to be effective.

Taxable
If this field is checked on then the Class will be Taxable. The Tax Code is entered in the next field.

Non Taxable Type
The Non Taxable Type allows the User to select from the options of GST Free, GST Exempt, Division 81, Input Taxed, Out of Scope, Export Sales and Undefined. The Drop down box can be clicked and a Non Taxable Type selected.

Tax Code

This field contains the Tax Code that is applicable to the Application Class. Enter a valid code or select from the Tax Code Pop Up form.

NOTE: - If the Licence Class is interfaced to Debtors and this field is changed then the following message will be displayed informing the User that this change will update all Debt Types for Fee Codes that do not have overriding accounts/tax codes.

'Changing the Systen Tax Code may require changes to the Tax Codes on each Debt Type linked to a Licence Fee. This may take some time. Do you wish to continue? Yes,No.'

Replying No will return the previous Account / Tax Code to the form and no updates will occur.

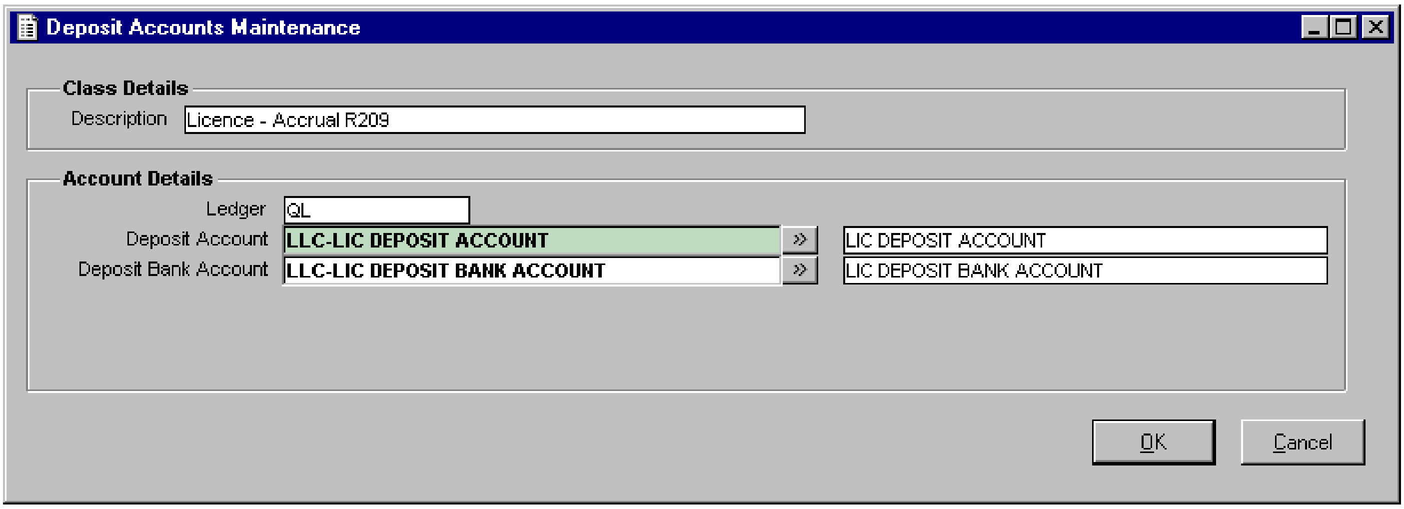
Replying Yes will check all existing Fee Codes Debt Types to see if their Accounts or Tax Codes need updating and update them where appropriate.

User should sign off their Pathway Sessions and sign back onto Pathway to make sure that the changed Parameters are used.

Tax Code Maintenance Detail Button
Once a Tax Code has been entered then the Detail Button can be selected to display the Accounts that will be used for processing of Tax.

Deposit Accounts Maintenance Form

This form defines the Deposit Ledger Accounts for the Licence Class. These accounts may be overridden at the individual fee code level. These Accounts would normally be set up after liaison with your Accounts Department.



Deposit Accounts Maintenance Form

Class Details – Description

This field contains the description of the Class of application to which you are assigning Licence Accounts

This field is display only and may not be maintained.

Account Details – Ledger

This field contains the ledger code to which all financial transactions will be posted. Only one ledger code per Licence class may be used.

Account Details

<u>Deposit Account</u>

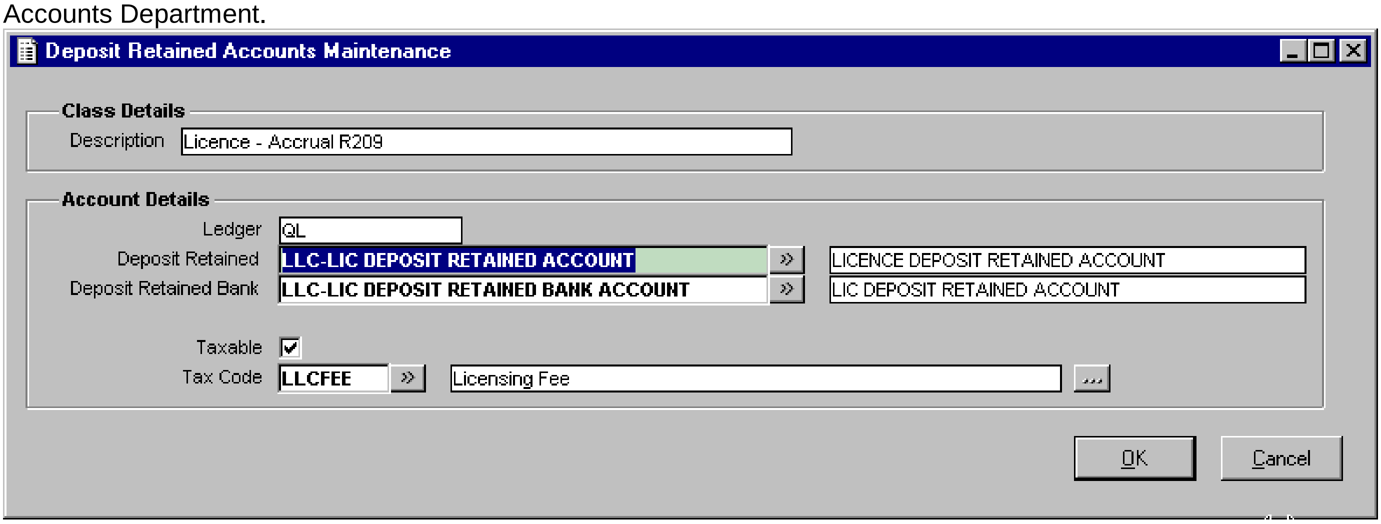
This field contains the ledger account to which all Bank transactions will be posted. The Field consists of 3 parts, an Account Number, Pop Up Button and the Account Description. The Pop Button for this and other Accounts listed below detail out to the Financial Account Pop Up Form for Account Selection.

<u>Deposit Bank Account</u>

This field contains the ledger account to which all Bank transactions will be posted. The Field consists of 3 parts, an Account Number, Pop Up Button and the Account Description. The Pop Button for this and other Accounts listed below detail out to the Financial Account Pop Up Form for Account Selection.

Deposit Retained Accounts Maintenance Form

This form defines the Deposit Retained Ledger Accounts for the Licence Class. These accounts may be overridden at the individual fee code level. These Accounts would normally be set up after liaison with your Accounts Department.



Deposit Retained Accounts Maintenance Form

Class Details – Description
This field contains the description of the Class of Licence to which you are assigning Licence Accounts

This field is display only and may not be maintained.

Account Details – Ledger
This field contains the ledger code to which all financial transactions will be posted. Only one ledger code per Licence class may be used.

Account Details

Deposit Retained Account
This field contains the ledger account to which all Bank transactions will be posted. The Field consists of 3 parts, an Account Number, Pop Up Button and the Account Description. The Pop Button for this and other Accounts listed below detail out to the Financial Account Pop Up Form for Account Selection.

Deposit Retained Bank Account
This field contains the ledger account to which all Bank transactions will be posted. The Field consists of 3 parts, an Account Number, Pop Up Button and the Account Description. The Pop Button for this and other Accounts listed below detail out to the Financial Account Pop Up Form for Account Selection.

Taxable
If this field is checked on then the Class will be Taxable. The Tax Code is entered in the next field.

Tax Code

This field contains the Tax Code that is applicable to the Licence Class. Enter a valid code or select from the Tax Code Pop Up form.

Tax Code Maintenance Detail Button
Once a Tax Code has been entered then the Detail Button can be selected to display the Accounts that will be used for processing of Tax.

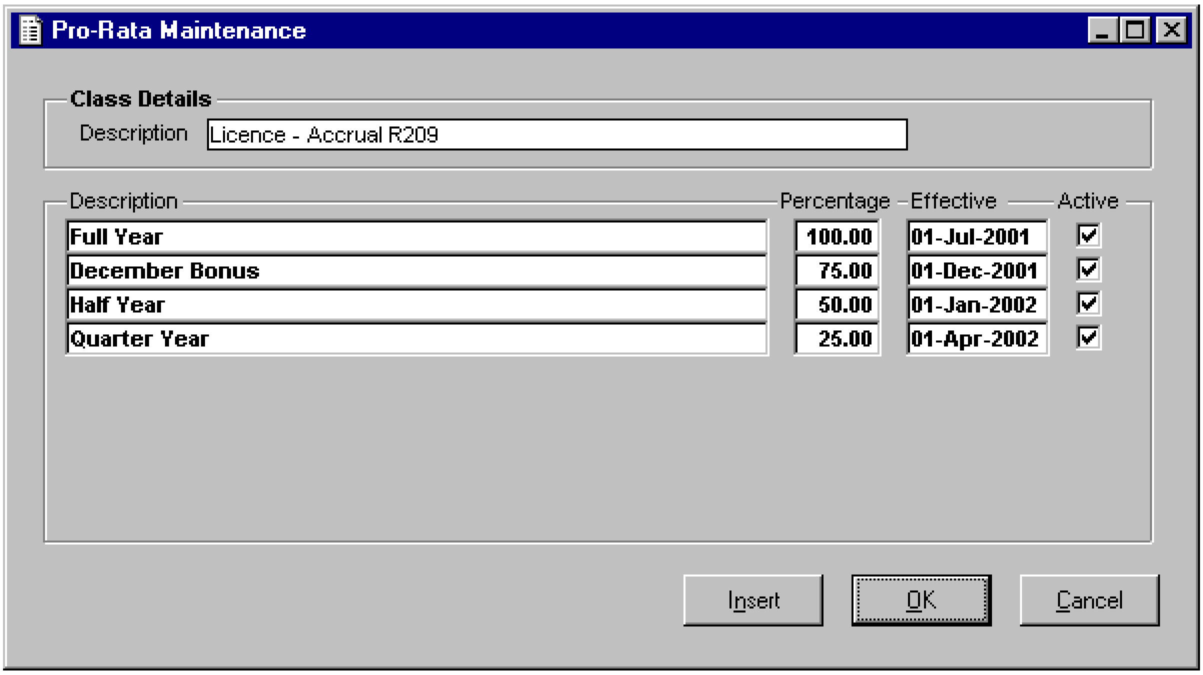
Pro-Rata Maintenance Form

The Pro-Rata Maintenance Form allows Users to set up in advance, when the pro-rata percentages become applicable and what those percentages are.

Users are provided with the following fields:

- Description
- Percentage
- Date Effective
- Active

The Fee calculation process will only look at the Active records, then determine which records has the earliest effective date to the current date and apply the percentage given.



Pro-Rata Maintenance Form

Class Details – Description
This field contains the description of the Class of Licence to which you are assigning Licence Accounts

This field is display only and may not be maintained.

Description
This field displays the description of the Pro-rata.

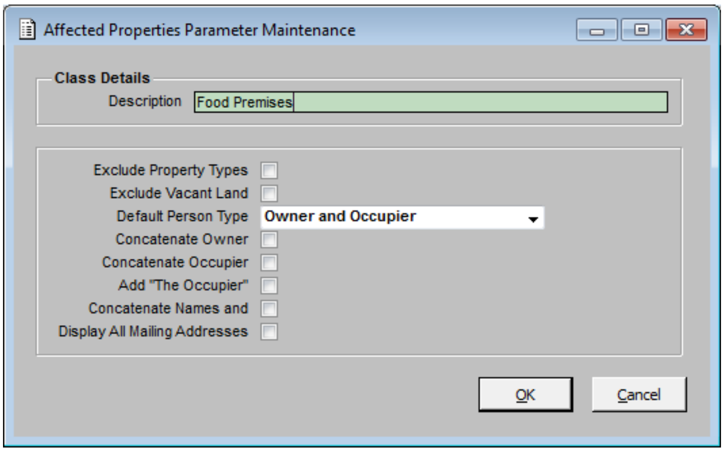
Percentage
This field contains the value of the Pro-Rata Percentage.

Date Effective
This field contains the effective date that the Pro-Rata Percentage will be applied to the relevant fees.

Active
If this box is checked on then the Pro-Rata Percentage will be available to be used by the System. If this box is not checked on then the Pro-Rata Percentage will not be available to be used.

Affected Properties Parameter Maintenance Form

The Affected Properties Parameter Maintenance form allows the entry of default information to assist with the creation of Affected properties.



Affected Properties Parameter Maintenance Form

Class Details - Description

This field displays the Class that the default information is being defined for within Licensing Parameters.

Exclude Property Types

If certain Property Types are to be excluded from the Affected Properties selection then this checkbox should be checked on by the User. Once flagged on then a Detail Option appears allowing the User to select the Property Types that are to be excluded from "The Occuper" letters within the Affected Properties.

Exclude Vacant Land

Selecting the Exclude Vacant Land check box will result in the exclusion of properties with Vacant Land as the primary Land Use from "The Occupier" letters. Vacant Land is determined via a Land Use code that has been set up in Property Parameters with a 'Vacant land' type setting.

Default Person Type

If a Default Person Type is chosen then the process will by-pass the Affected Properties Selection form when inserting Affected Properties on a Licence. The selected Person Type will be automatically applied to any new Properties linked to the Licence of this Class. Only select a default Person Type if all Affected Properties for the Licence Class will require the same record types to be created. Only select a default Person Type if all Affected Properties for the Application Class will require the same record type to be created. Option available are : -

- (none)
- Owner and "The Occupier"
- Occupier
- Owner and Occupier
- "The Occupier"
- Owner Only
- Owner

Note that Default Person Type of 'Other' is not available in the dropdown. If Default Person Type is selected then the Other Interested Parties Option will become available on the Affected Properties form.

Concatenate Owner

Setting the Concatenate Owner flag will default this value onto the Affected Property Select form for new Affected Properties. Note the Affected Property Selection form will only display if the Default Person Type has been set to 'None' or no Affected Properties Parameters have been defined.

Concatentate Occupier

Setting the Concatenate Occupioer flag will default this value onto the Affected Property Select form for new Affected Properties. Note the Affected Property Selection form will only display if the Default Person Type has been set to 'None' or no Affected Properties Parameters have been defined.

Add "The Occupier"

Setting the Add "The Occupier" flag will default this value onto the Affected Property Select form for new Affected Properties. Note the Affected Property Selection form will only display if the Default Person Type has been set to 'None' or no Affected Properties Parameters have been defined.

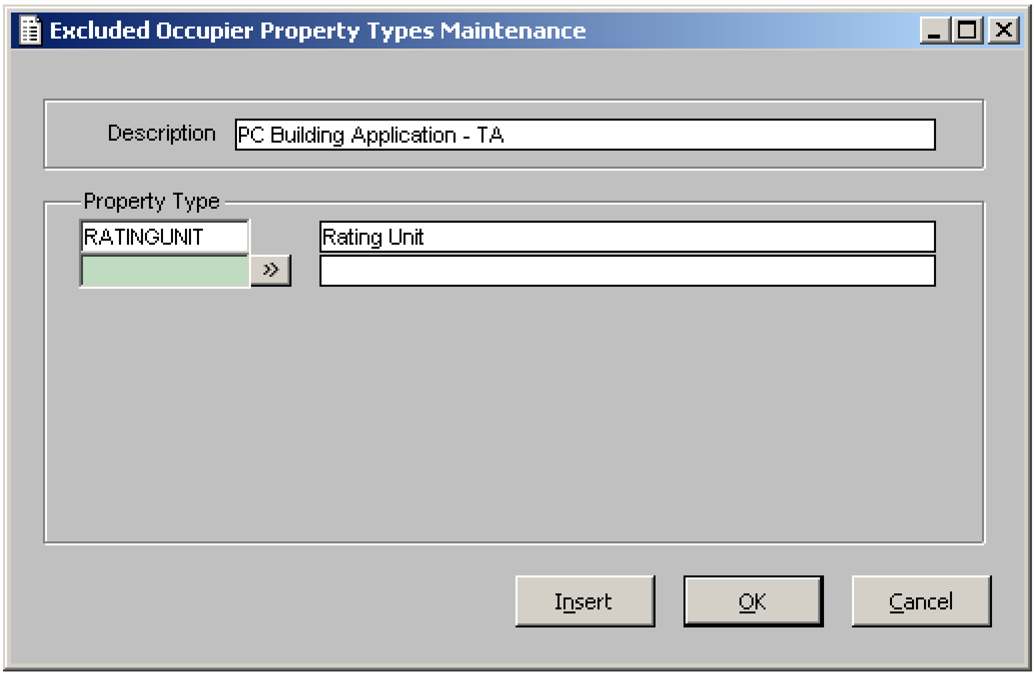
Concatenate Names
Setting the Concatenate Names flag will default this value onto the Affected Property Select form for new Affected Properties. Note the Affected Property Selection form will only display if the Default Person Type has been set to 'None' or no Affected Properties Parameters have been defined.

Note that this option is only available if the Secured Function is set to allow the Concatenation of same Names.

Display All Mailing Addresses
Checking this flag on will display all Mailing Addresses on the Affected Properties Maintenance Form.

Excluded Occupier Property Type Maintenance Form

This form allows the setting of those Property Types that are required to be excluded from generating 'The Occupier" records on the Affected Properties form. For example a Park would not required to have 'The Occupier" letter sent to it.



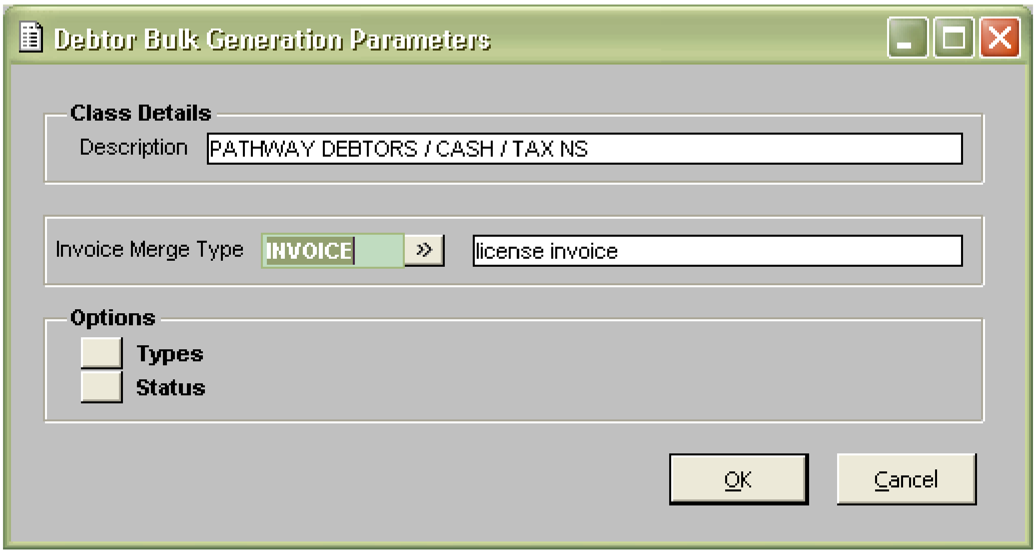
Excluded Occupier Property Types Maintenance Form

Description
This field is a detailed Description of the Application Class.

Property Type
Enter in the Property Types that are to be excluded from having a 'The Occupier" entry created for them. If the Type is not know then the Pop Up can be used to display a list of valid Property Types to select from.

Debtor Bulk Generation Parameters Form

The Debtor Bulk Generation Parameters form enables the setting of the Merge Type to be used for the Invoice Print function and the setting of the License Types and Status that are to be included in the bulk update process.



Debtor Bulk Generation Parameters Form

Class Details - Description

This field contains the description of the Class of License to which you are assigning the Debtor Bulk Generation Parameters for.
This field is display only and may not be maintained.

Invoice Merge Type

This field contains the Merge Type that will be used when the Print Invoice option is selected for the Bulk Generation processes. If a Merge Type is not entered then the License Class will not display within the Bulk Update function. The Merge Type can be entered directly or the Pop Up displayed to show a list of availabler Merge Types.

Options - Types

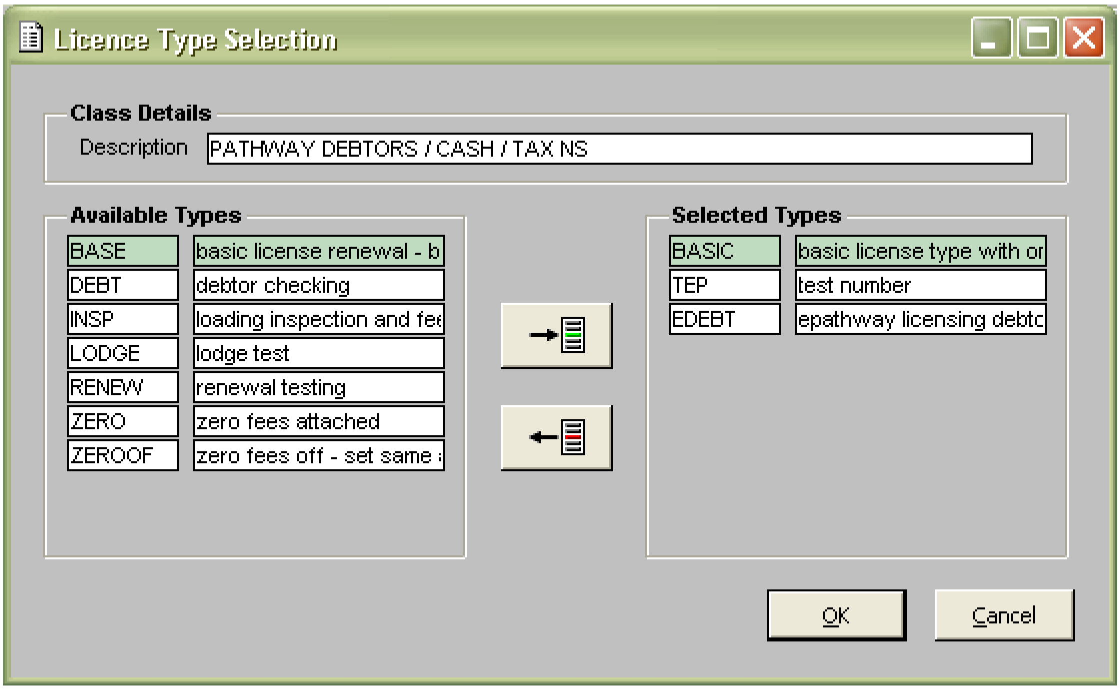
Selecting the Types Option will display the Licence Type Selection form where the user is able to nominate the Types that are able to be processed via the Debtor Bulk Generation function.

Options - Status

Selecting the Status Option will display the Status Selection form where the user is able to nominate the Statuses that are able to be processed via the Debtor Bulk Generation function.

Licence Type Selection Form

This form allows the selection of the Licence Types that can be used within the Debtor Bulk Generation process. Only those Licence Types selected will be included in the Bulk process.



Licence Type Selection Form

Class Details - Description

This field contains the description of the Class of Licence to which you are selecting Licence Types. This field is display only and may not be maintained.

Available Types

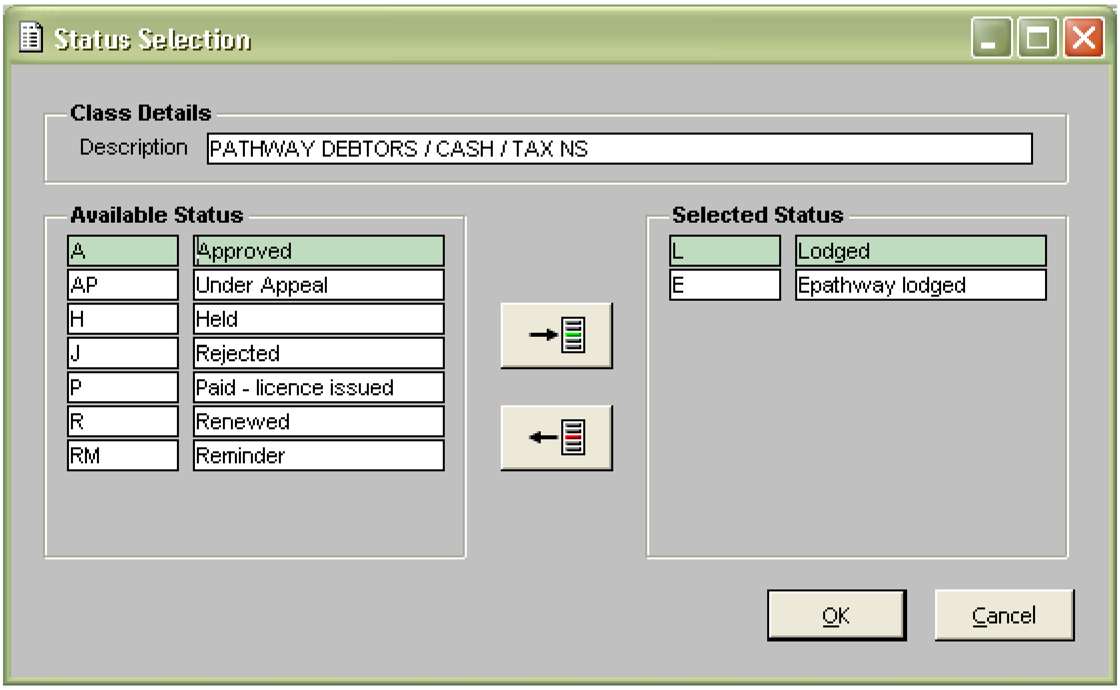
The Licence Types for the Class are displayed in the Available Types area. Highlight the required Licence Type and use Move Option to move the required Licence Type to the Selected Types List. Once a Licence Type has been moved to the Selected Types list is not displayed in the Available Types list.

Selected Types

The Licence Types that have been selected for the Bulk Generation process are displayed in this list. If a Licnence Type is required to be removed from the list then highlight the required Licence Type and use Move Option to move the Licence Type to the Available Types List. Once a Licence Type has been moved to the Available Types list is not displayed in the Selected Types list.

Licence Status Selection Form

This form allows the selection of the Licence Statuses that can be used within the Debtor Bulk Generation process. Only those Licnece Statuses selected will be included in the Bulk process.



Status Selection Form

Class Details - Description

This field contains the description of the Class of Licence to which you are selecting Licence Statuses. This field is display only and may not be maintained.

Available Status

The Licence Status for the Class are displayed in the Available Status area. Highlight the required Licence Status and use Move Option to move the required Licence Status to the Selected Status List. Once a Licence Status has been moved to the Selected Status list is not displayed in the Available Status list.

Selected Status

The Licence Status that have been selected for the Bulk Generation process are displayed in this list. If a Licence Status is required to be removed from the list then highlight the required Licence Status and use Move Option to move the Licence Status to the Available Status List. Once a Licence Status has been moved to the Available Status list is not displayed in the Selected Status list.

Workflow

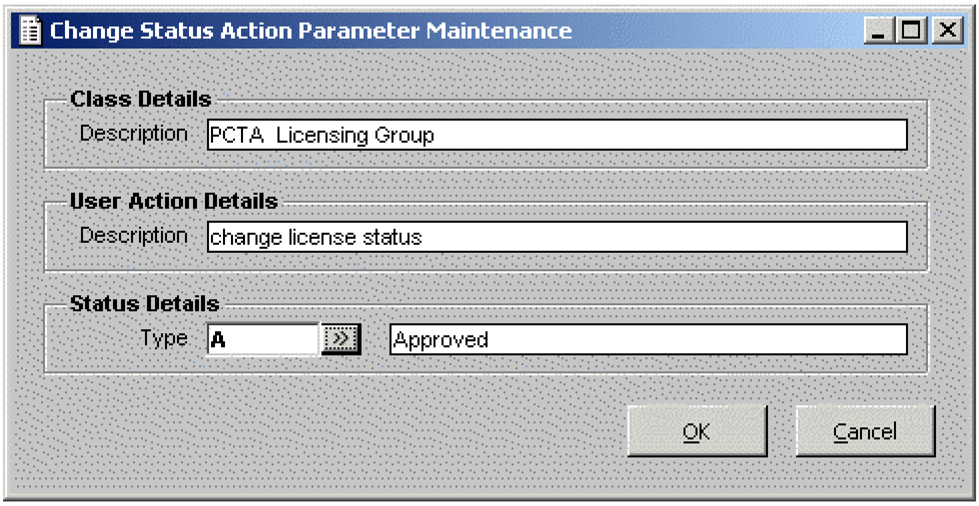
This option is used to set up Workflow Parameters. Please refer to the Workflow User Guide for more information on this option.

A new function has been added to the Workflow process, whereby if a Task is suspended it is possible that the Licence is suspended as a result. Please refer to the Workflow User Guide for more information on this option.

As some of the Workflow System Actions are related to Licensing the following Action Forms are available within the Licensing Workflow System Actions.

Change Status Action Parameter Maintenance Form

The Change Status Action Parameter Maintenance form is displayed when the Action Parameter Option is selected from the User Maintenance Form and the System Action of ‘STAT’ has been entered. This form allows the selection of the Status Type that is to be used when the Task is started within a Licence. If this form is left blank and the Task is used then an error message is displayed informing the user that no Status Type has been defined in the parameters.



Change Status Action Parameter Maintenance Form

Class Detail – Description
This field displays the Class Description.

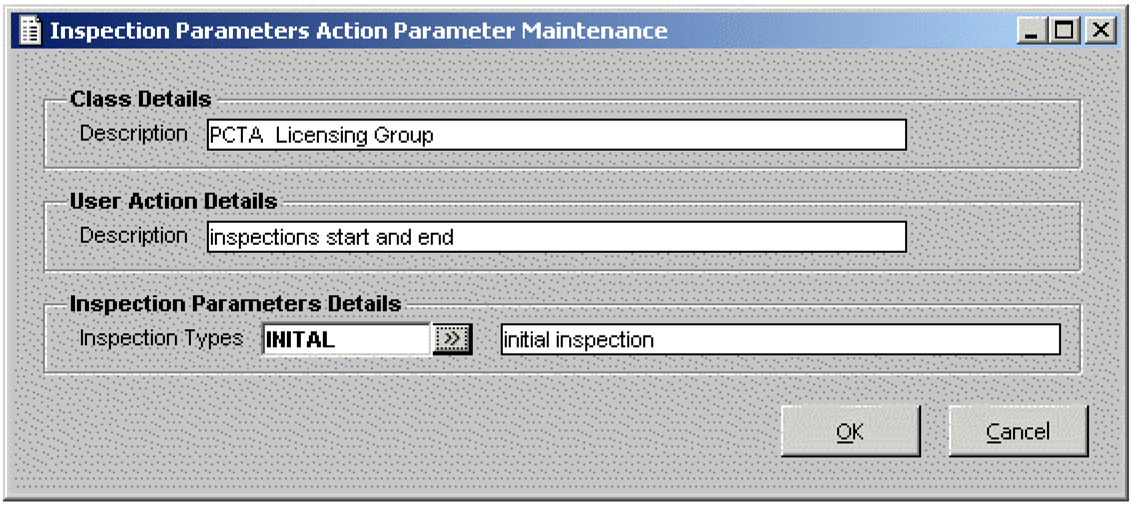
User Action Details - Description
This field displays the decription of the User Action that has been selected and for which the Status Details is to be displayed for.

Status Detail - Type
The Status Type that the Licence is to be changed to is nominated in this field. The Pop Up button can be used to display a list of valid Status to be used. This field must contain a Status Type otherwise the Task will not work within Licensing Maintenance and the User will be displayed with an error.

Inspection Parameters Action Parameter Maintenance Form

The Inspection Parameters Action Parameter Maintenance form is displayed when the Action Parameter Option is selected from the User Maintenance Form and the System Action of ‘INSPSE’ has been entered.

This form allows the selection of the Inspection Type that is to be used when the Task is started within a Licence.



Inspection Parameters Action Parameter Maintenance Form

Class Detail – Description

This field displays the Class Description.

User Action Details - Description

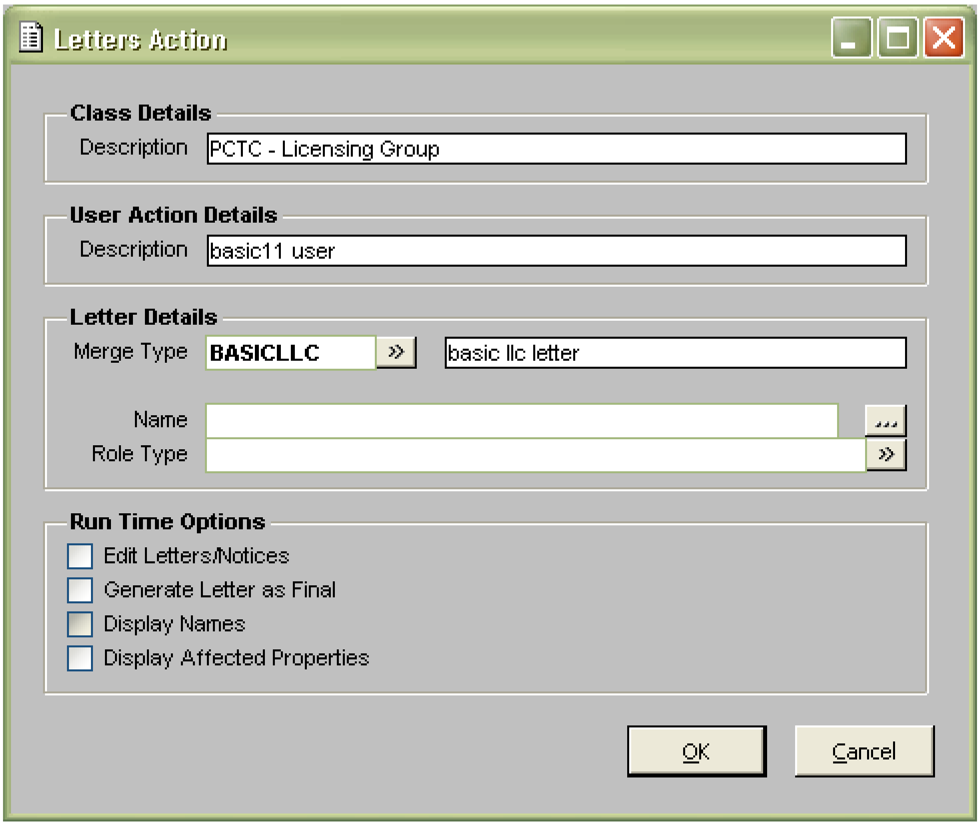
This field displays the decription of the User Action that has been selected and for which the Inspection Type is to be displayed for.

Inspection Parameters Detail – Inspection Types

The Inspection Type that the Inspection is to be created for is nominated in this field. The Pop Up button can be used to display a list of valid Inspection Types to be used. This field must contain an Inspection Type otherwise the Task will not work within Licensing Maintenance and the User will be displayed with an error.

Letter Action Parameter Maintenance Form

The Letter Action Parameter Maintenance form is displayed when the Action Parameter Option is selected from the User Maintenance Form and the System Action of 'LETRSEND' has been entered. This form allows the selection of the Letter Type that is to be used when the Task is started within a Licence.



Letters Action Maintenance Form

Class Detail – Description

This field displays the Class Description.

User Action Details - Description

This field displays the decription of the User Action that has been selected and for which Letter Meter Type is to be displayed for.

Letter Details – Merge Type

The Merge Type that is to be created is nominated in this field. The Pop Up button can be used to display a list of valid Merge Types to be used.

Letter Details – Name

If the Letter is to be sent to a particular person or company then the name can be entered into this field. If the Letter is to be sent to numerous role types or people then this field can be left blank. Upon entering in a Name the Role Type, Display Names and Display Affected Properties fields become dimmed and cannot be entered into.

Letter Details – Role Type

If the Letter is to be sent to a particular Role Type then the Role Type can be entered or selected in this field. If the Letter is to be sent to numerous people then this field can be left blank. Upon entering in a Role Type the Name, Display Names and Display Affected Properties fields become dimmed and cannot be entered into.

Run Time Options – Edit Letters/Notices

If the Editing of a letter is not required then this field can be flagged off. If Editing of a letter is required than this field should be flagged on.

If the Edit Letters check box is flagged on then the Generate Letter as Final field is dimmed.

Run Time Options – Generate Letter as Final

If the Generate Letter as Final check box is off then Letters will be created as Drafts.

If Final prints are required, then the Generate Letter as Final check box should be selected. This will produce the Final Document and set the document as Final Printed.

If the Generate Letter as Final is checked on then the Edit Letters option is dimmed.

Run Time Options – Display Names

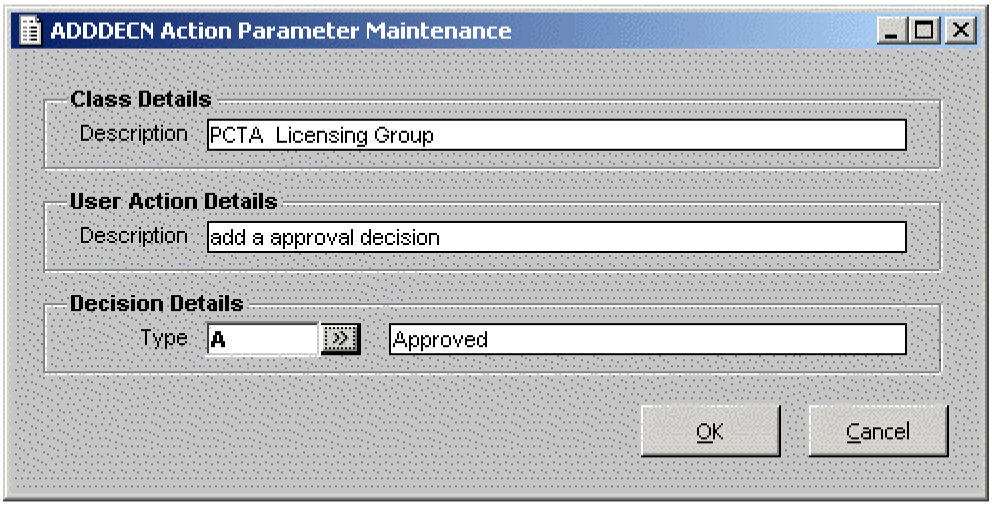
If the Name and the Role Type fields within the Letter Details section are blank then the Display Names option is available for selection. Flagging this field on will mean that the Name Maintenance Form will be displayed when this Task is activated to allow the User to nominate from the Name Maintenance form the Names that are required to receive the Letter nominated on this form. Upon flagging the Display Names field on the Name, Role Type and Display Affected Properties fields become dimmed and cannot be entered into.

Run Time Options – Display Affected Properties

If the Name and the Role Type fields within the Letter Details section are blank then the Display Affected Properties option is available for selection. Flagging this field on will mean that the Affected Properties Maintenance Form will be displayed when this Task is activated to allow the User to nominate from the Affected Properties Maintenance form the Names that are required to receive the Letter nominated on this form. Upon flagging the Display Affected Properties field on the Name, Role Type and Display Names fields become dimmed and cannot be entered into.

ADDDECN Action Parameter Maintenance Form

The ADDDECN Action Parameter Maintenance form is displayed when the Action Parameter Option is selected from the User Maintenance Form and the System Action of 'ADDDECN' has been entered. This form allows the selection of the Decision Type that is to be used when the Task is started within a Licence.



ADDDECN Action Parameter Maintenance Form

Class Detail – Description

This field displays the Class Description.

User Action Details - Description

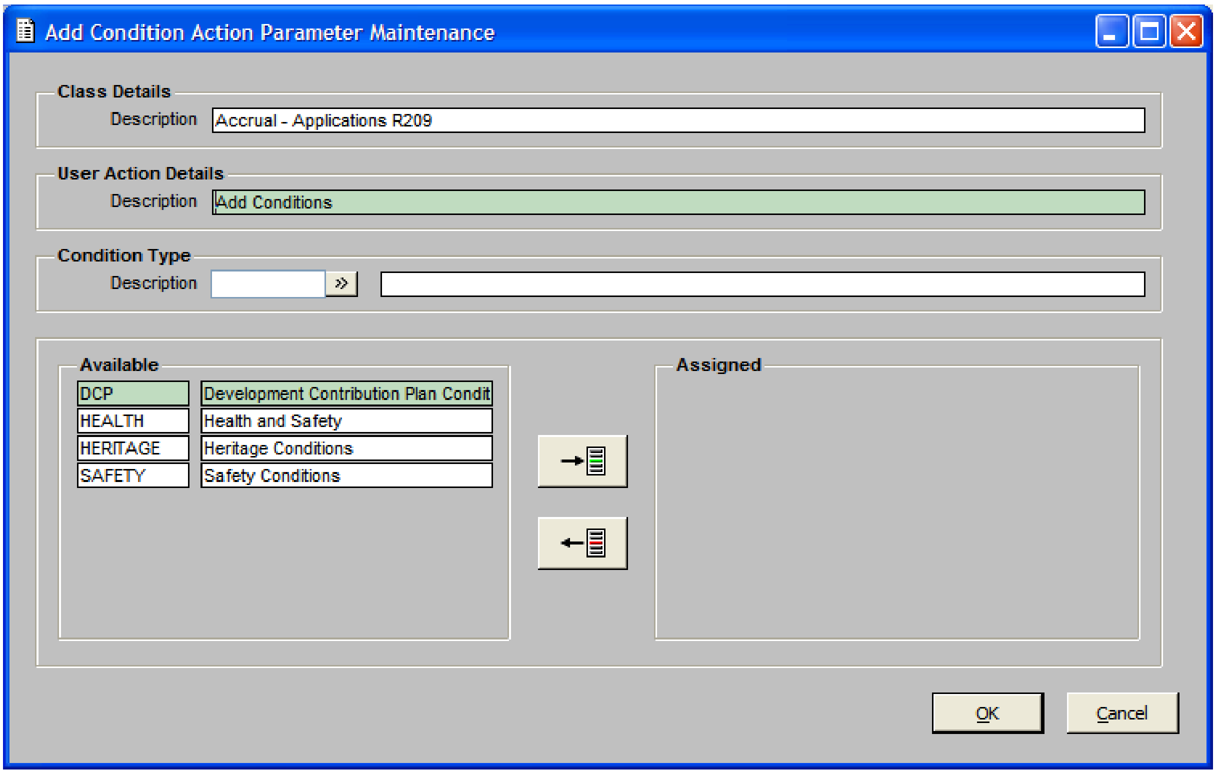
This field displays the decription of the User Action that has been selected and for which the Decision is to be displayed for.

Decision Details - Type

The Decision Type that is to be used is nominated in this field. The Pop Up button can be used to display a list of valid Decision Types to be used.

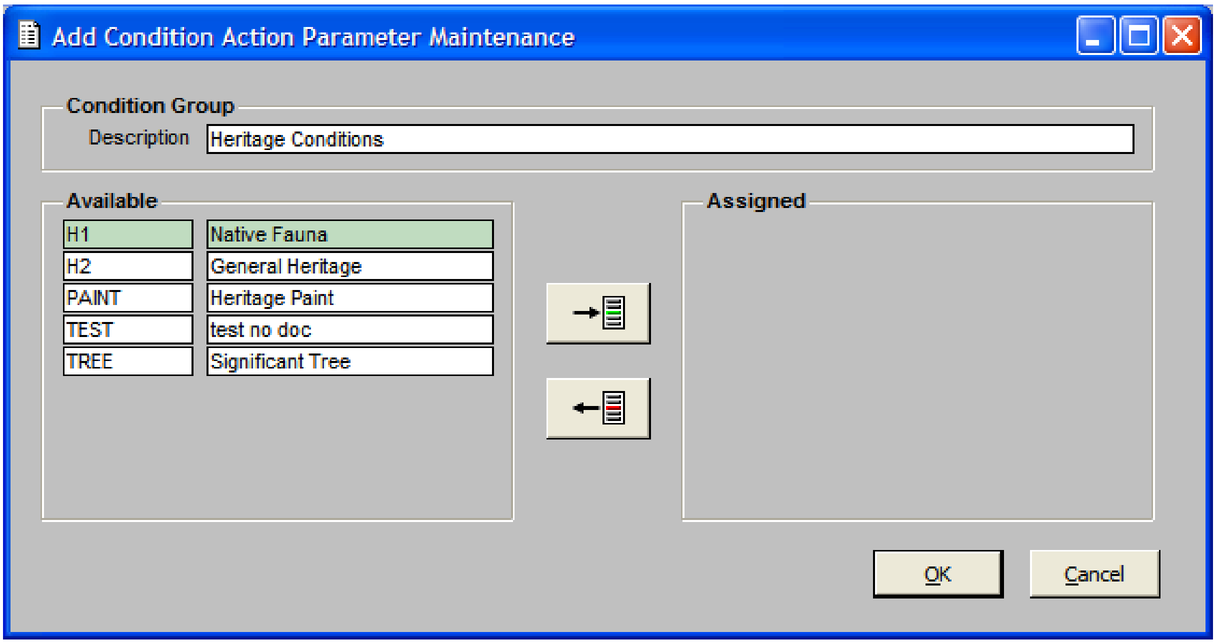
Add Condition Action Parameter Maintenance Form

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



Add Condition Action Parameter Maintenance form

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

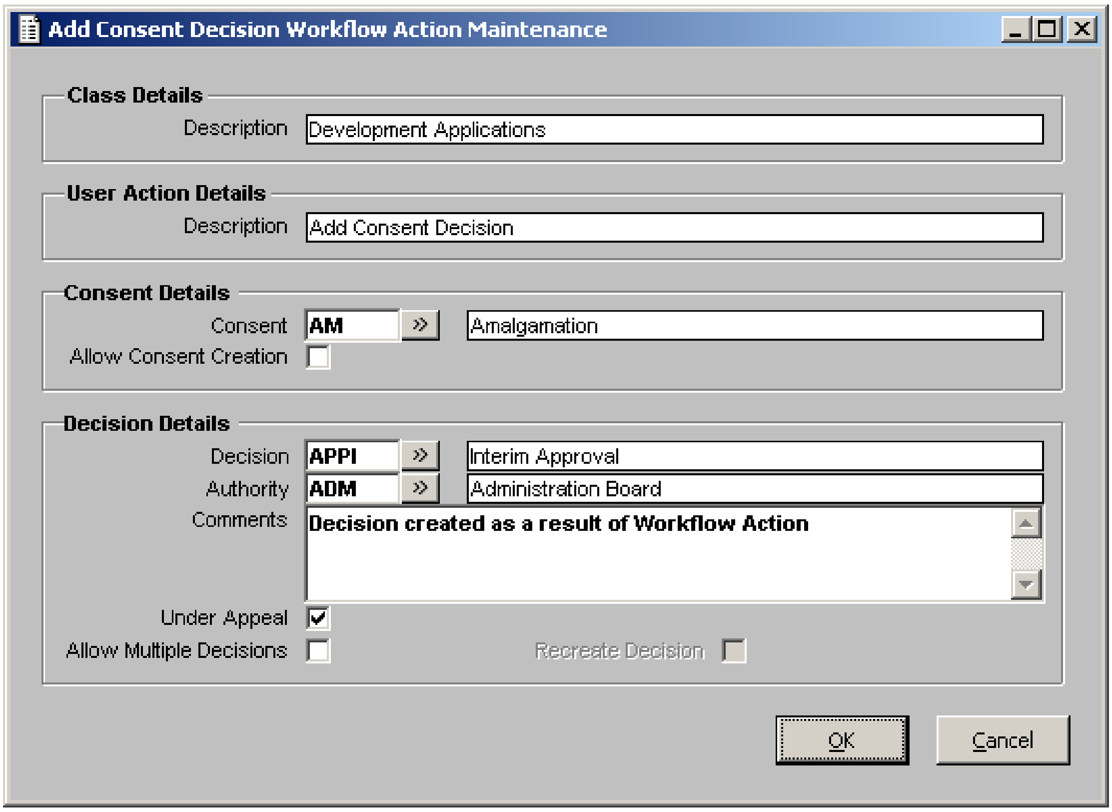


Add Condition Action Parameter Maintenance form

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

Add Consent Decision Workflow Action Maintenance Form

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



Add Consent Decision Workflow Action Maintenance form

Allow Consent Creation

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

Allow Multiple Decisions

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

Recreate Decision

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

Authority Type

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

Comments

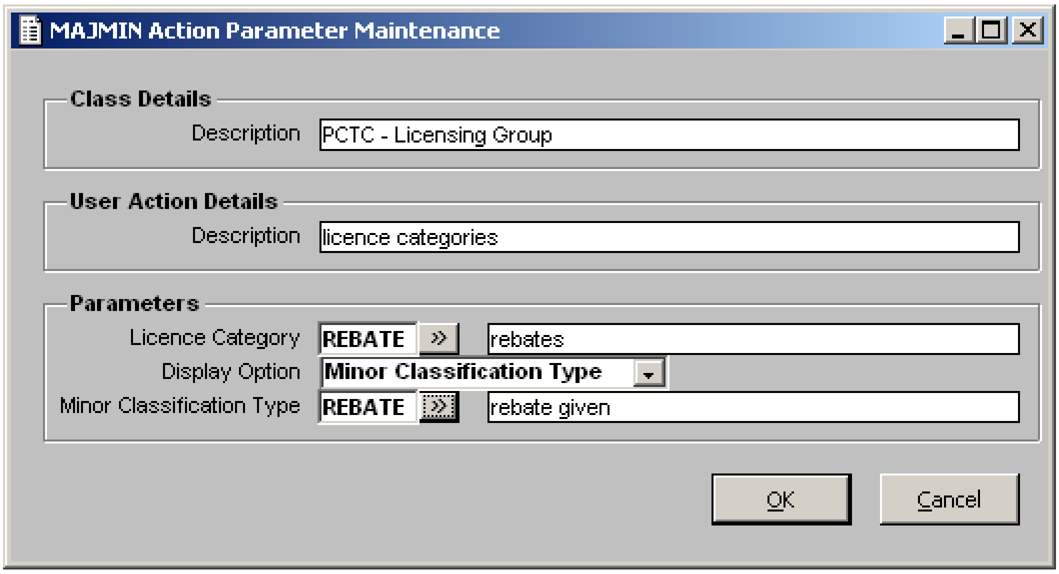
The default Comments that will be assigned to newly created Decision records as a result of executing the Add Consent Decision Workflow Action.

Under Appeal

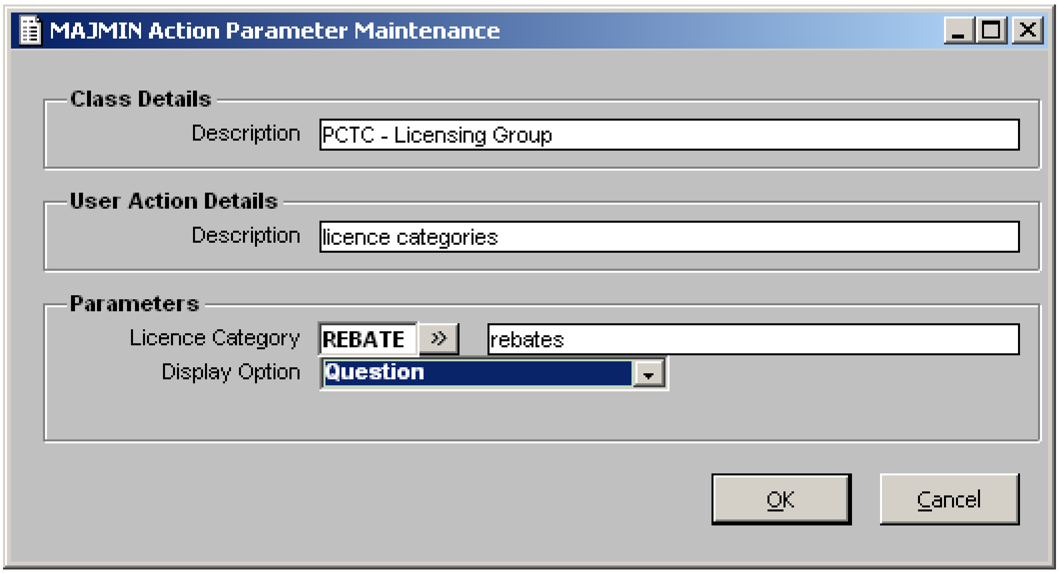
The default value that will be assigned to newly created Decision records as a result of executing the Add Consent Decision Workflow Action.

MAJMIN Action Parameter Maintenance Form

The MAJMIN Action Parameter Maintenance form is displayed when the Action Parameter Option is selected from the User Maintenance Form and the System Action of ‘MAJMIN’ has been entered. This form allows the selection of the Licence Category that is to be used when the Task is started within a Licence and whether the Workflow is to display the Minor Classification Type or the Questions for the nominated Licence Category. Note that it is not necessary to nominate a display option or enter in a licence category.



MAJMIN Action Parameter Maintenance Form – display option of Minor Classification Type



MAJMIN Action Parameter Maintenance Form – display option of Question

Class Detail – Description

This field displays the Class Description.

User Action Details - Description

This field displays the decription of the User Action that has been selected and for which the Licence Categorye Type is to be displayed for.

Parameters – LicenceCategory

If a particular Licence Category is to be used for the Workflow then it can be entered into this field.. The Pop Up button can be used to display a list of valid Licence Categories to be used.

Parameters – Display Option

Upon entry to this form the Display Option is blank. A dropdown provides for the selection of either 'Minor Classification Type' or 'Questions'.

If the Display Option is set to 'Minor Classification Type' then when the workflow action is performed the action will proceed directly to the Minor Classification Dimension Maintenance form for the nominated Minor Development Category. This will allow the User to enter in the required Dimension information for the nominated Minor Classification.. If the User leaves the Minor Classification Type field blank then the User will be taken to the Minor Development Categories Maintenanc form and allows the User to insert the required Minor Classifications / Dimensions.

If the Display Option is set to 'Questions' then when the workflow action is performed the action will proceed directly to the Questions Maintenance form for the nominated Licence Category. This will allow the User to enter in the answers to the Questions for the Licence Category.

This field can be left blank if required.

Parameters – Minor Classification Type

If the display Option has been set to 'Minor Classification Type' then the Minor Classification Type Parameter is displayed to allow the User to nominate the required Minor Classification Type to be automatically defaulted in by the workflow action and will take the User to the Minor Classification Dimension Maintenance form.. If the User is to select the required Minor Classifications then this field can be left blank. If left blank then the action will take the User to the Minor Classification Maintenance form where the User will have to select the required Minor Classification.

Conditions

Conditions Creation & Maintenance

Conditions can be added against a Licence Fee and also against the actual Licence
Condition Parameters in Licensing consist of Condition Groups and Condition Types.
Both Condition Groups and Types are added by using the Insert button to add a code and description.
Further details on Conditions are found in the Conditions Manual.

Response Maintenance

Response Maintenance is a Word Processing Document Form and is fully detailed in the Word Processing User Guide.

However, a general outline of Response Maintenance is as follows.

Responses allow a User to enter a specific Response to a Licence. There are two ways that a Response may be entered in the Licensing Module.

The first type of Response is if an actual Letter has been sent to a Property Owner or Occupier as part of an Affected Property Notice Run. These people may then contact the Council and either agree or reject the proposed Licence. Their Response to the Licence is entered against the Letter Request sent.

The Second type of Response could be from a person who does not live near the proposed Licence Location, or may have just walked past a Property where changes may be taking place. These people are able to contact the Council and have their Response entered against the Licence Summary Form.

These Response then may be a deciding factor as to whether the Licence is finally approved.

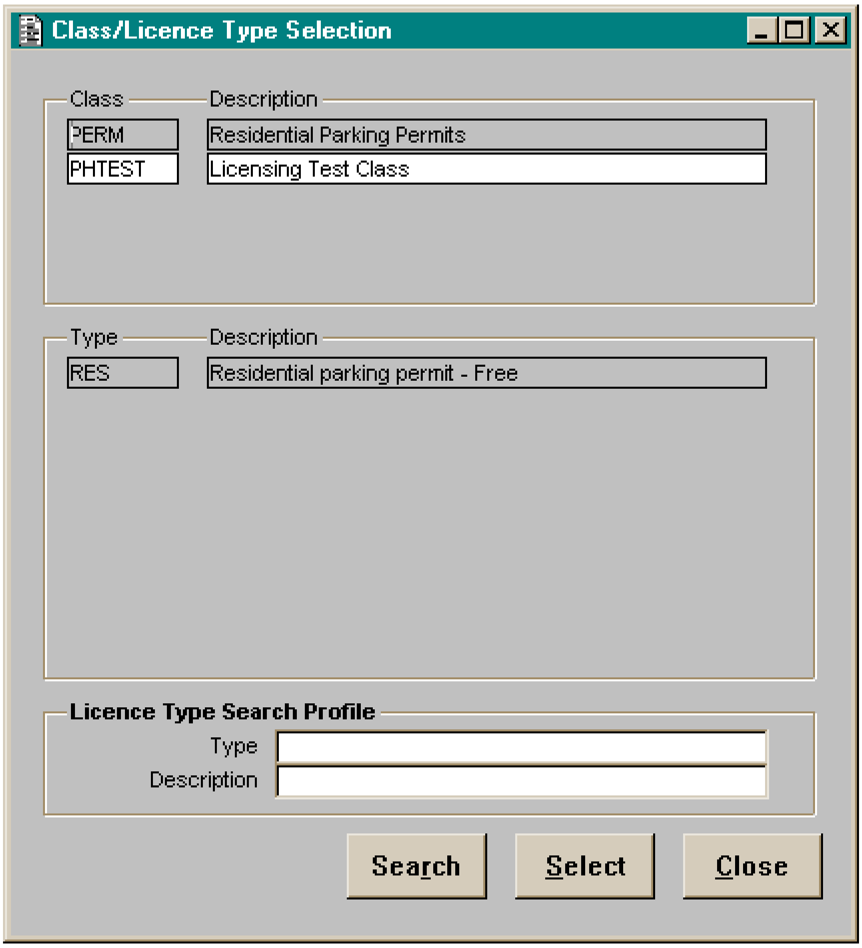
Licence Entry

The following topics are covered in this section:

Licence Type Selection

Class/Licence Type Selection Form

The Licence Type Selection form allows the User to Select from a predefined list of Classes and Licence Types. The User will only see Classes that they have Authority to Access.
The Form consists of the following fields:



Class/Licence Type Selection Form

Class
This field will detail the Class Code selected.

Description
This field will detail the full Description of the Class Code selected.

Type
This field lists all the available Licence Types that may be selected for Licence Entry.

Description
This field is a detailed Description of the Licence Types that may be selected for Licence Entry.

Licence Type Search Profile - Type
This field allows the User to enter in a full or partial Licence Type and then click the Search Button to find any Types with the matching criteria.

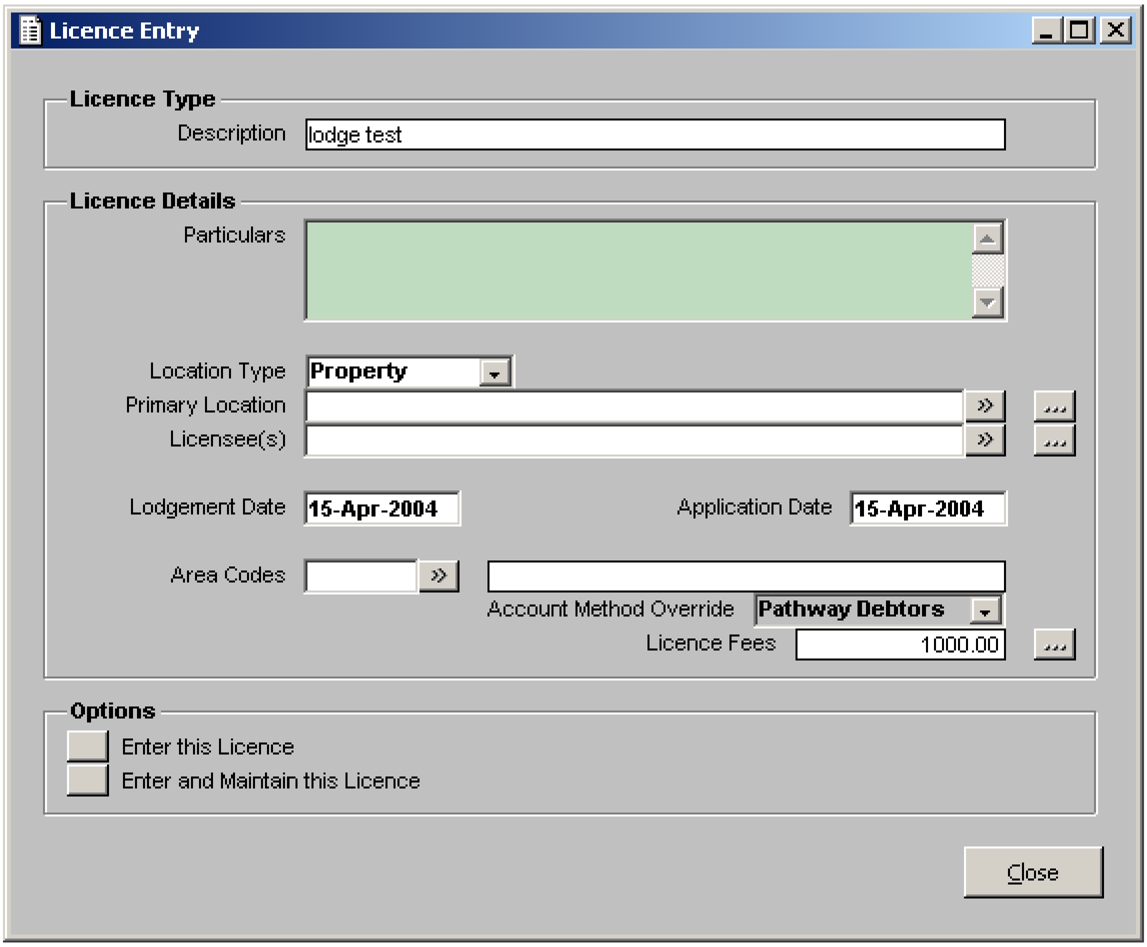
Licence Type Search Profile - Description

This field allows the User to enter in a full or partial Licence Type and then click the Search Button to find any Types with the matching criteria.

Licence Entry

Licence Entry Form

The Licence Entry Form is designed to allow the processing of a Licence. Procedures set up through parameters are used to lodge the Licence.



Licence Entry Form

Licence Type

A Licence Type is a predefined Code that can have linked pre-defined parameters for a specific type of Licence. Any number of Licence Types can be set up according to the Councils requirements.
Licence Types are shown and may be selected from the list provided.
Once selected the field will show the selected code and the description.

Description

The description fully details the Code of the Licence Type.

Location Type

The Location Type describes if the Licence is to be Lodged against a Property a Parcel or Street.

Primary Location

The Primary Location is the main location that a Licence is lodged against. A Licence may have more than one location, but this field details the location that will be used as the main basis for the Licence.

A Location may be keyed directly into the field, or the detail button used to Search for an existing Location.

Licencee

The Licencee field will detail the name of the Person applying for the Licence. This may be the Owner of the Property or any other person such as a Builder, Architect etc.

Lodgement Date

The Licence Entry Date is the date that the actual Licence is entered into the Computer System.

Application Date

The Licence Date is the date that the person actually applied to the Council to have the Licence processed.

Area Codes

The Area Codes Details which Group within the Council will process the Licence Type. The Council may be split into several different Offices or may have particular groups of people to deal with different types of Licensing.

Area Codes Code may be keyed directly into the field, or selecting the Pop Up Button will produce a list of predefined Groups for selection.
Once selected the Field will display the name of the Area Code and its Description.

Fast Track

The Fast Track option is designed to allow Council Officers to process simple Licensing “on the spot” and have the Consent letter produced immediately. Selecting this check box will allow for this processing to occur. If the check box is not selected the Licence will proceed with normal Licence Entry procedures.

Print Cover Sheet

The Option of Printing a Cover Sheet allows Council Staff to have a written summary of the Licence. This is usually attached to the front of the particular Licence Folder for handy reference. This Cover Sheet may be as detailed or summarised as required.

Account Method Override

The Account Method Override field is displayed on the Lodgement Form to enable the User to change the Accounting Method that has been defined as the Default to the Override if required. Where no Override has been defined then this field is displayed and cannot be changed.

Upon entering the Lodgement Form this field is ‘greyed’ to inform the User that this is the Default Account Method for the Class. If the User selects another available Account Method then the field is shown as normal.

NOTE: Once the Account Method has been set and fees added to the Licence then the Account Method field will become non-editable and will not be able to be changed.

NOTE: When the Account Method for a Licence has been set to Pathway Debtors then it is necessary for any Receipts to be raised against the Debtor Invoice and not against the Licence. These Receipts will need to be created as DLC type Receipts with the Payment Reference being nominated in the Qualifier field. It will not be possible to receipt directly to the Licence.

When the Account Method for a Licence has been set to COM Debtors then no Receipts should be raised via Pathway.

Licence Fees

The Licence Fee Field details the dollar value set against the Licence Type. This amount will be added to the Licence as it is lodged. You are able to detail out to the actual Licence Fee screen and insert any other fees that may be required and have not been set as a default.

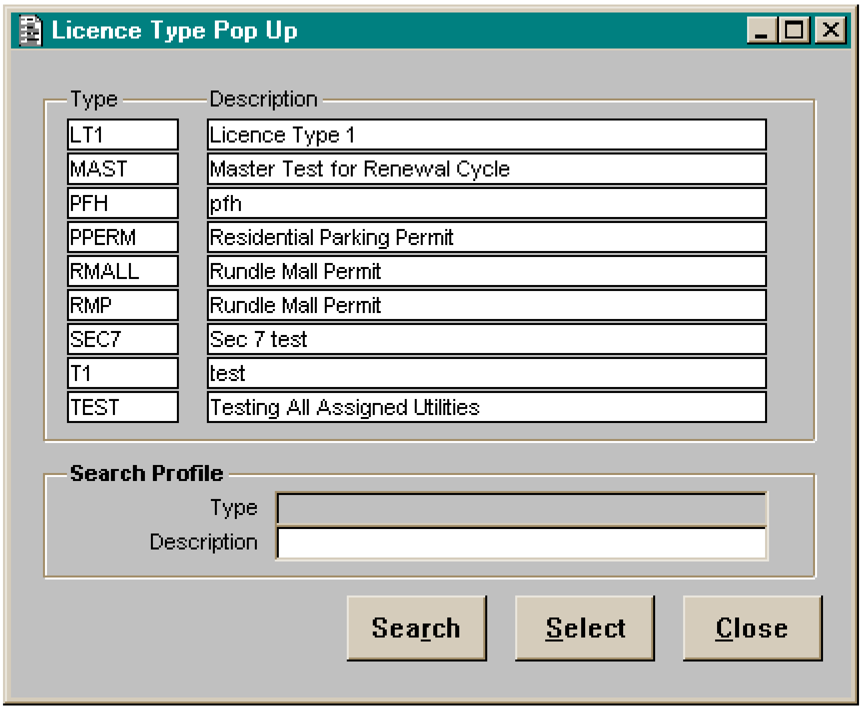
Enter this Licence

This button actually begins the Licence Entry process once selected. The Licence Entry will proceed to select any options set for the Licence Type for data entry. A number for the Licence will be produced on the screen Once Licence Entry is complete, a Licence Entry form will be presented with the last Licence Type defaulting you may either Lodge another Licence of this type or you can Exit from this option, select another Type and begin the process again. Or simply exit from Licence Entry.

Enter and Maintain this Licence
Selecting this button allows for the Licence to be Lodged and then Proceed to the Licence Summary Screen to select any options required to be maintained.

Licence Type Pop Up Form

The Licence Type Pop Up Form is used to Display all available Licence Types.



Licence Type Pop Up Form

Type
The Licence Type is a Coded Field particular to each Licence Type Created.

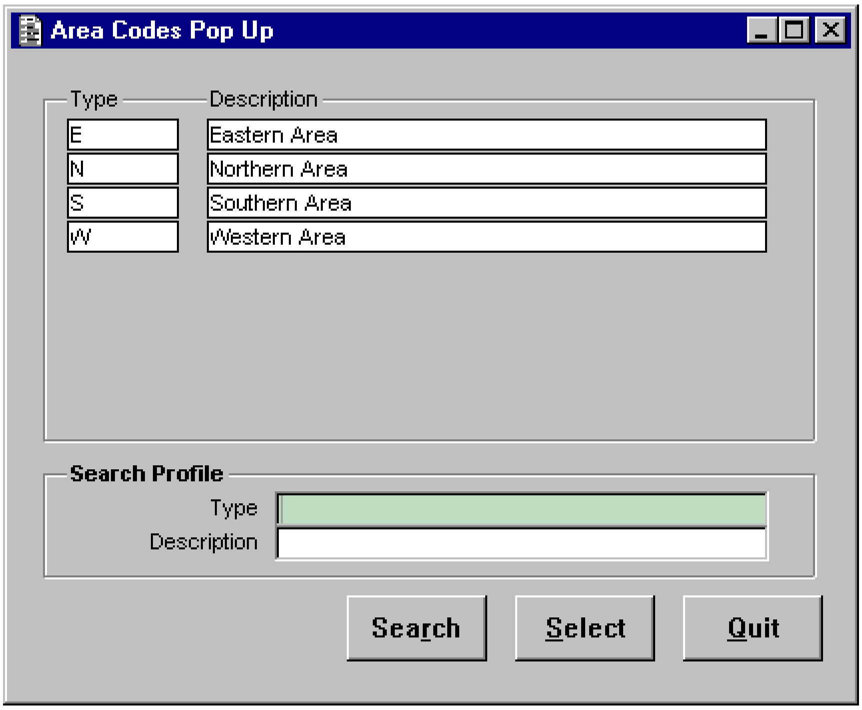
Description
The Licence Type Description is more detailed enabling easier selection.

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

Search Profile - Description
A Description may be entered and then use the Search button to initiate the search. Wildcard searching is available on this field.

Area Codes Pop Up Form

The Area Codes Pop Up Form is used to Display all available Area Codes.



Area Codes Pop Up Form

Type
The Area Codes Type is a Coded Field particular to each Area Codes Created.

Description
The Area Codes Description is more detailed enabling easier selection.

Search Profile - Type
Enter a Area Codes Type (or part thereof) on which to base your search and use the Search button to initiate the search. Wild card searching is available on this field.

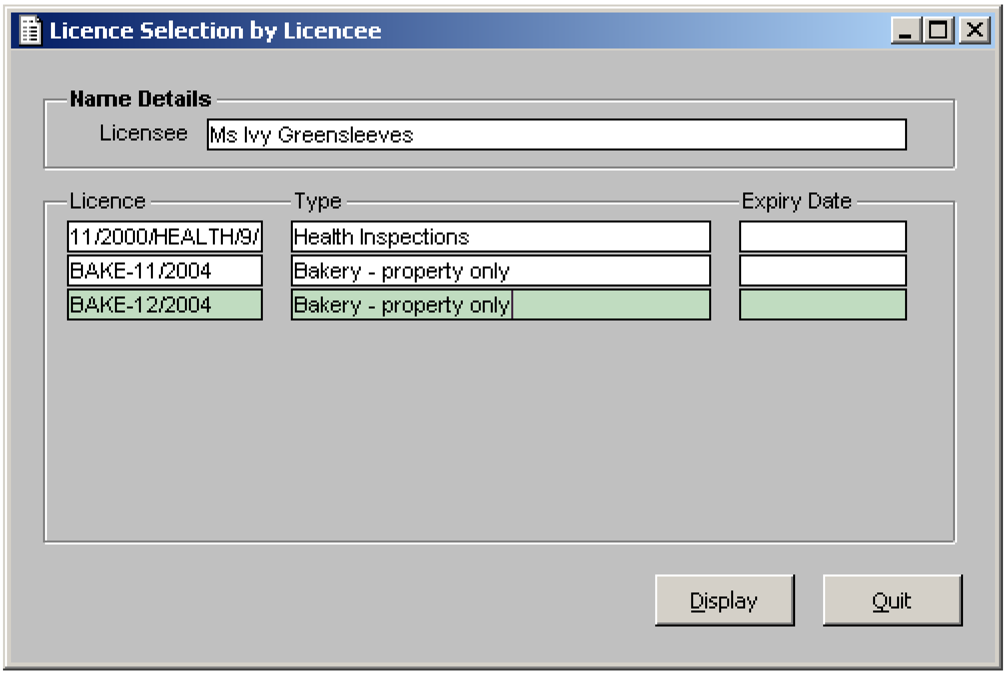
Search Profile - Description
A Description may be entered and then use the Search button to initiate the search. Wild card searching is available on this field.

Licence Selection by Licencee

When the 'Display Licences for Licencee' is set 'On' within a Licence Class then all previous Licences for this Licencee will be displayed when entering a Licencee Name in Licence Entry. If set 'Off' then Licences for the Licencee for this Class will not be displayed.

At Licence Entry if all Classes have this flag set 'Off' Users will not be notified of other Licences for the same name. Where some Classes are set 'On' then only Licences for those Classes with the same Licencee will be displayed.

Note that if the Expiry Date is in the past then the Licence is not shown on this form. Only Licences without an Expiry Date or an Expiry Date in the future are shown.



Licence Selection by Licencee Form

Name Details - Licencee
The Name of the Licencee is displayed in this form.

Licence
The Licence Number that the Name is the Licencee for is displayed in this field.

Type
The Licence Type Description for the Licence Number is shown in this field.

Expiry Date
If there is an Expiry Date against the Licence then it is displayed in this field. Note that if the Expiry Date is in the past then the Licence is not shown on this form. Only Licences without an Expiry Date or an Expiry Date in the future are shown.

Licensing Maintenance

The following topics are covered in this section:

Licensing Search Profile

Licensing Search Profile Form

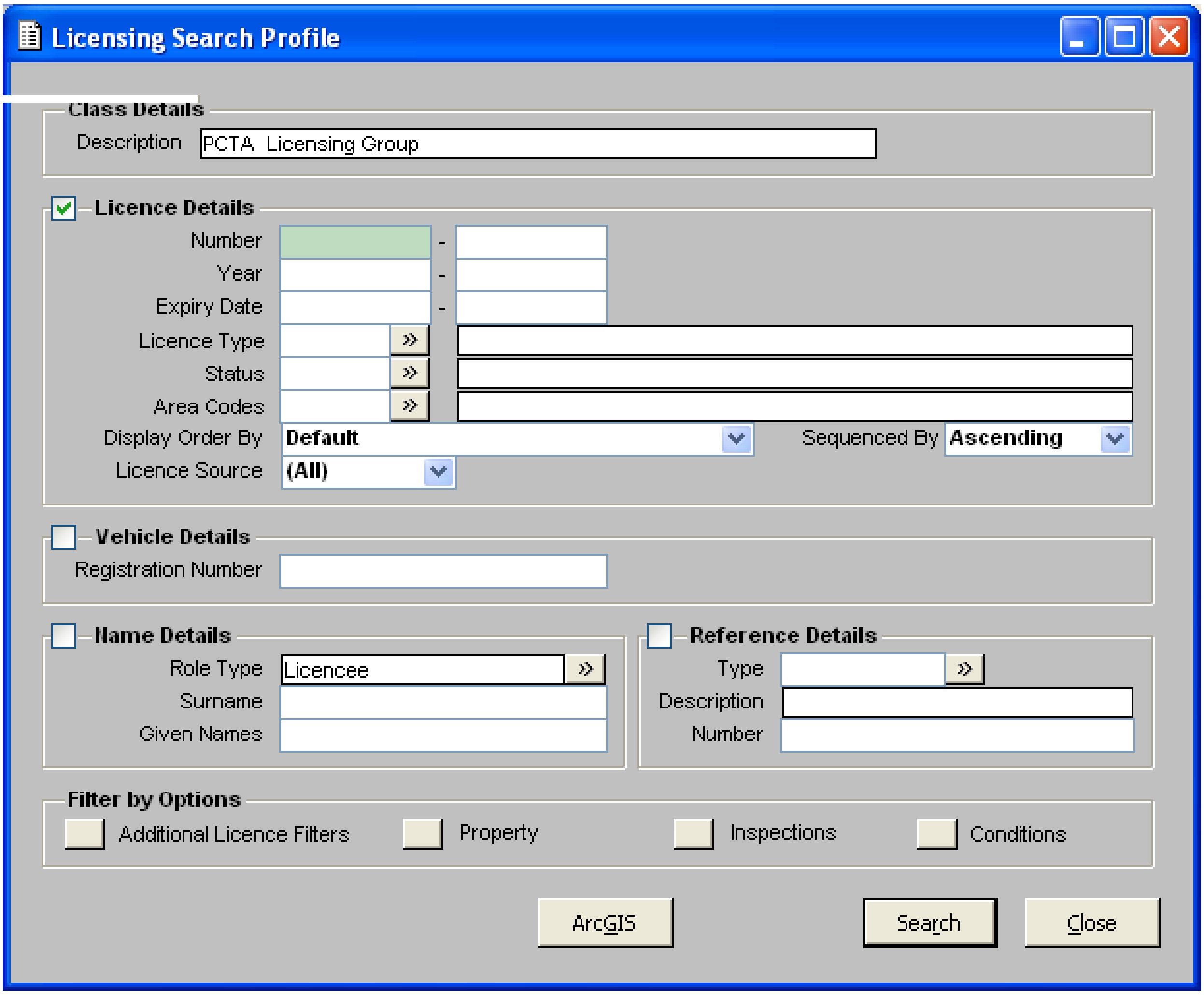
On entry to the Licensing Maintenance (or enquiry) function the first form that is displayed is the Class Selection form. Focus on the required Class and click on the Select Button and the Licensing Search Profile form is displayed.

This form allows you to enter a search profile on which to base your search. Advanced Search Profile Techniques may be used on this form. For more information on Advanced Search Profile Techniques please refer to the How to Use User Guide.

The Licensing Search Profile Form is used to enter specific criteria to allow a previously lodged licence to be displayed. If all Licences for the particular class are required, clicking on the Search button will then display all Licences. One or more of these may then be selected for modification or enquiry.

The Licensing Search Profile is broken up into three distinct components. Each of these components has a check box in the top left-hand corner. Only one of these check boxes may be selected at any one time ie. they cannot be used in conjunction with each other. As you type into a Search Profile field the corresponding check box will be enabled for that component. The various fields within each component may be used in conjunction with each other.

Licence Details can be used in conjunction with the Filter by Options. The Additional Licence Filters Option displays a Filter form where Consents, Categories, Decisions, Purpose Codes and or Responsible Officer information can be added to the Search Criteria. Selecting the Property Button will display the Property Search Profile form. For more information on the Property Search Profile form please refer to the Property User Guide. If Inspections are available, selecting the Inspections Option will display the Inspections Search form.



Licensing Search Profile Form

Class Details - Description

This field displays the Class Description and cannot be maintained.

Licence Details

The Licence Details Selection Box is automatically checked on by default, to allow a Licence to be found via a Licence Search. The Licence Details section can be used in conjunction with the Property Filter. The Search criteria's are as follows:

Licence Details - Number

As each Licence is lodged, it is allocated a number. These fields can be used to enter the number range required for modification or enquiry.

Entering a number in the first field and tabbing to the next field will default the number entered in the first field into the second field. This will result in a direct search.

However if a range of licences are required then the following example explains how this is done;

Entering 6 in the first field and 10 in the second field will result in all Licences within the number range entered inclusive of the entered numbers.
Entering 6 in the first field and deleting the defaulted number in the second field will return Licence 6 and greater.

Licence Details - Year

Licences generally have a year allocated as part of their number. Entering the year in these fields will also help to narrow the length of search.

Entering a year in the first field and tabbing to the next field will default the year entered in the first field into the second field. This will result in all Licences lodged within the entered year and meeting any other search criteria.

However if a range of licences are required then the following example explains how this is done;

Entering a year in the first field and a different year in the second field will result in all Licences within the year range entered inclusive of the entered years and meeting any other search criteria.

Licence Details – Expiry Date

This field allows the User to search on a Licence based on an Expiry Date Range. The User may enter a 'To' and 'From' range of dates to search upon. Once entered, select the Search Button to proceed.

Licence Details - Licence Type

Each Licence has a predefined type. A Type can be keyed into this field, or the Pop Up Button clicked to choose from the Licence Type Pop Up form.

Licence Details - Status

Each Licence is assigned a Status. The Status may be keyed into the field if known, or use the Pop Up Button to choose from the Status Pop Up form.

Licence Details – Area Codes

Each Licence may have an Area Code assigned. The Area Code may be keyed into the field if known, or use the Pop Up Button to choose from the Area Codes Pop Up form.

Licence Details – Display Order By

The Display Order By is defaulted to the Order that has been defined in the System Parameter Form. This can be changed to another Sequence Order by the User. The Options available from the dropdown are:-

- Default (current display)
- Lodgement Date, Year, Number and Type
- Expiry Date, Year, Number and Type
- Number, Year, Lodgement Date and Type
- Number, Year, Expiry Date and Type
- Year, Number, Lodgement Date and Type
- Year, Number, Expiry Date and Type

The Order By function only applies for search selections using "Licence Details" and "Additional Licence Filters".

Licence Details – Sequenced By

The Sequenced By is defaulted to the Sequence that has been defined in the System Parameter Form. This can be changed to another Sequence by the User. The Options available from the dropdown are:-

- Ascending
- Descending

The Sequenced By function only applies for search selections using "Licence Details" and "Additional Licence Filters".

Licence Details – Application Source

The Licence Source can be used to filter out Licenses that have been either created via ePathway or Pathway. The following options are available:-

- All (default)
- ePathway
- Pathway

Vehicle Details

Click on the Vehicle Selection Box to allow a Licence to be found via a Vehicle Search. When this box is checked on the search is exclusive of any other data entered in any other section in the Search Profile Form.

Vehicle Details – Vehicle Registration Number

This field allows the User to enter a known Vehicle Registration Number and Search. If only a partial Registration Number is known, the use of wild cards will allow the User to produce a list of Registration Numbers that fall into the criteria selection.

Name Details
Click on the Name Details Selection Box, to allow a Licence to be found via a Name. When this box is checked on the search is exclusive of any other data entered in any other section in the Search Profile form. The Search criteria's are as follows:

Name Details - Role Type
Every Person entered against a Licence is assigned a particular Role Type. This may be an Licensee, Proprietor, Trading Name etc. Keying a Role Type will select Licences that have that particular Role Type attached to them. Clicking on the Pop Up Button will display a list of Role Types for Selection.

Name Details - Surname
Enter a Surname (or part thereof) on which to base your search. Advanced profile techniques are available on this field.

Name Details - Given Names
Enter a Given name (or part thereof) on which to base your search. Advanced profile techniques are available on this field.

Reference Details
Click on the Reference Details Selection Box, to allow a Licence to be found via a Reference. When this box is checked on the search is exclusive of any other data entered in any other section in the Search Profile form. The Search criteria's are as follows:

Reference Details - Reference Type
Enter a Reference Type if known. Use the Pop Up button to display the Reference Type Pop Up form and select the required Reference Type.

Reference Details - Reference Description
This field displays the Reference Description and is not maintainable.

Reference Details - Reference Number
Enter a Reference Number to narrow the search criteria.

Filter by Options – Additional Licence Filters
Selecting the Additional Licence Filters button will display the Filter form to allow additional search criteria to be entered. This additional information could be for Consents, Categories, Decisions, Purpose Codes and or Responsible Officer.

Filter by Options - Property
Selecting this button will display the Property Search Profile form. The Property Search Profile Form will further filter the Licence Details on the Licence Search Profile Form.

The Property Search Profile Form can also be used without entering any details on the Licence Search Profile.

Enter a Street and/or Suburb and select Search. The Licence Selection Form will display all Licences lodged that meet the Search criteria.

For more information on the Property Search profile Form please refer to the Property User Guide.

Filter by Options - Conditions

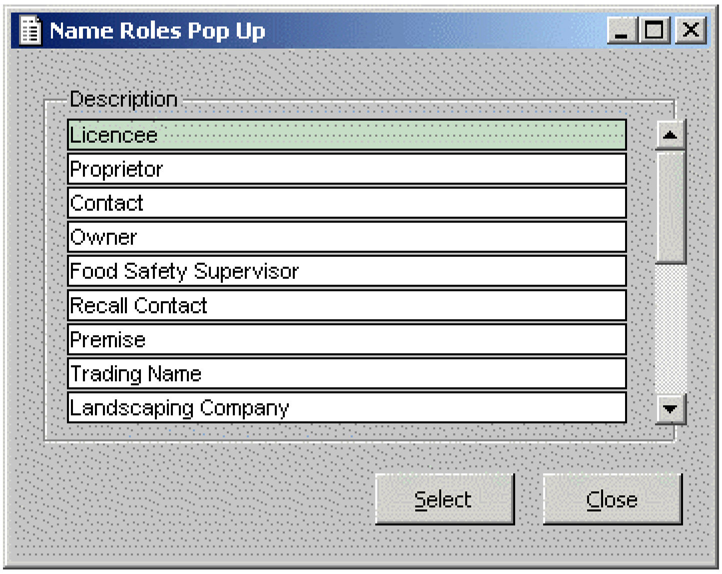
Select this button to enable searching by specific Conditions – this will narrow the search criteria.

Filter by Options - Inspections
Selecting this button will display the Inspections Search Profile form. The Inspections Search Profile Form will further filter the Licence Details on the Licence Search Profile Form.

The Inspection Search Profile Form can also be used without entering any details on the Licence Search Profile.

Name Role Pop Up Form

The Name Role Pop Up Form provides the User with a list of predefined Roles assigned to the Application System. Highlight one of the Role Types and Press the Select button to return to the Search Profile Form. Your Selected Role Type will appear in the Role Type field.



Name Roles Pop Up Form

Description
This field displays the Name Role Types that are available for selection.

Additional Licence Filters

Additional Licence Filters Form

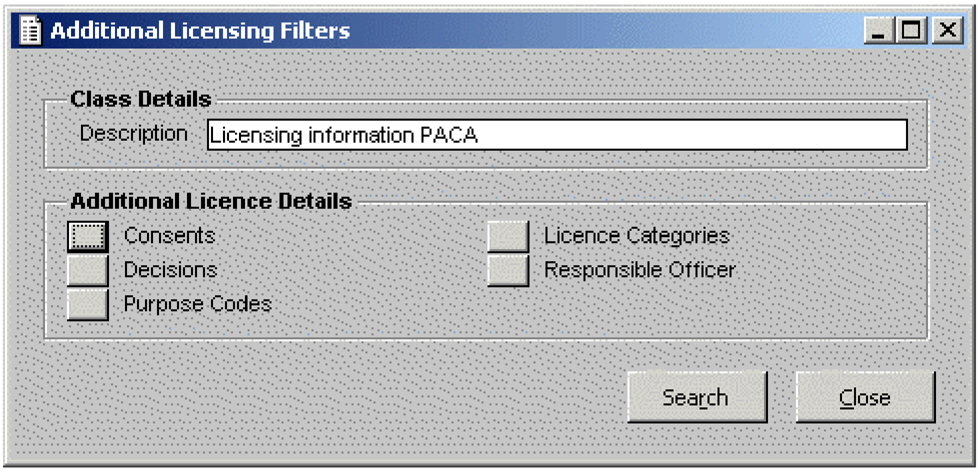
The Licence module now has the ability to combine the Licence Search Profile details with Consents, Decisions, Development Categories, Purpose Codes and Responsible Officer Search Profile Details.

Selecting the Search button on either the Additional Licence Filters for, or any of the other Additional Filter Options, will initiate the process of finding all Licences that match the criteria used on ALL the Additional Filter Options AND the Licence Search Profile form.

Selecting the OK button on one of the Addititial Filter Options forms, saves the Search Criteria entered for that form and returns to the Additional Licence Filters form to allow the User to select another Additional Filter Option.

Where search criteria has been entered against an Additional Filter that Option will become Bolded to let the User know that there is information contained in that Option that will affect the Searching process.

The Standard Pathway features such as Filter Favourites are available on all the Additional Filter Options Forms.



Additional Licensing Filters Form

Class Details - Description
This field displays the Class Description and cannot be maintained.

Additional Licence Details - Consents
Selecting the Consents Button will display the Consents Filter. On the Consents Filter form the User is able to enter in additional search criteria related to Consents information. The options available are Consent, Nature, Lodgement Date range, Application Date range, Expiry Date range. One or all of these options can be used.

Selecting the OK button on the Consent Filter form will save the selection information and return the User to the Additional Filter Options form. Once returned to this form the User is able to select another additional filter option if required.

Selecting the Search button will initiate the process of finding all Licences that match the criteria that has been entered on this form ALONG with any criteria that has been entered on any of the other Additional Filter Options AND the Licence Search Profile.

Additional Licence Details – Licence Categories

Selecting the Licence Categories Button will display the Licence Categories Filter. On the Licence Categories Filter form the User is able to enter in additional search criteria related Licence Categories.

Selecting the OK button on the Licence Categories Filter form will save the selection information and return the User to the Additional Filter Options form. Once returned to this form the User is able to select another additional filter option if required.

Selecting the Search button will initiate the process of finding all Licences that match the criteria that has been entered on this form ALONG with any criteria that has been entered on any of the other Additional Filter Options AND the Licence Search Profile.

Additional Licence Details – Decisions

Selecting the Decisions Button will display the Decisions Filter. On the Decisions Filter form the User is able to enter in additional search criteria related to Decisions information. The options available are Decision, Authority, Rejection Reason, Decision Date range, Effective Date range. One or all of these options can be used.

Selecting the OK button on the Decisions Filter form will save the selection information and return the User to the Additional Filter Options form. Once returned to this form the User is able to select another additional filter option if required.

Selecting the Search button will initiate the process of finding all Licences that match the criteria that has been entered on this form ALONG with any criteria that has been entered on any of the other Additional Filter Options AND the Licence Search Profile.

Additional Licence Details – Responsible Officer

Selecting the Responsible Officer Button will display the Responsible Officer Filter. On the Responsible Officer Filter form the User is able to enter in the required Responsible Officer or use the Pop Up to select the Officer.

Selecting the OK button on the Responsible Officer Filter form will save the selection information and return the User to the Additional Filter Options form. Once returned to this form the User is able to select another additional filter option if required.

Selecting the Search button will initiate the process of finding all Licences that match the criteria that has been entered on this form ALONG with any criteria that has been entered on any of the other Additional Filter Options AND the Licence Search Profile.

Additional Licence Details – Purpose Codes

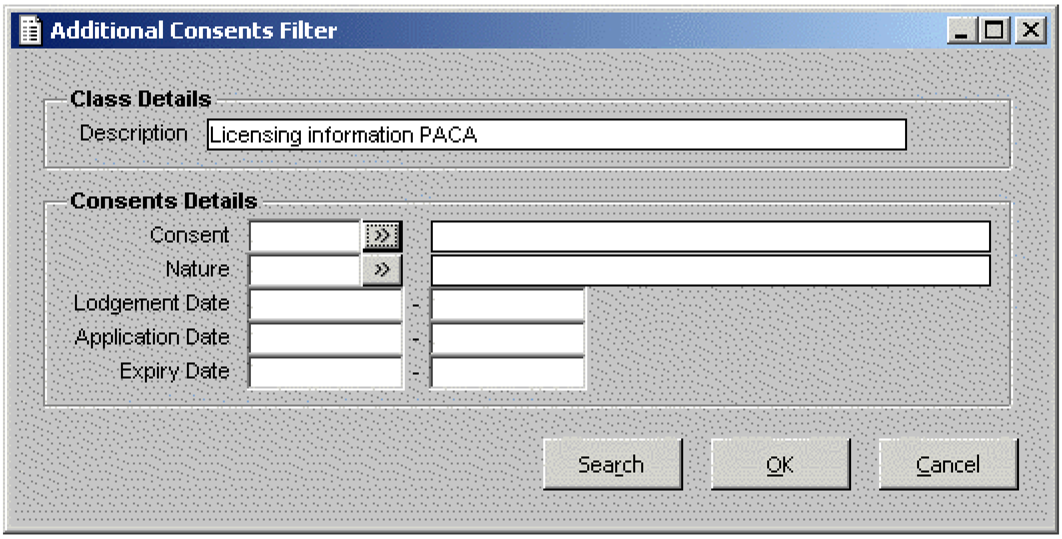
Selecting the Purpose Codes button will display the screen which will enable the user to search for the relevant purpose code, either by entering the purpose code or using the pop up selection to choose from a list.

Additional Consents Filter Form

The Additional Consents Filter form allows additional search criteria to be nominated using Consents. The options available for searching over are Consent, Nature, a Lodgement Date Range, Application Date Range, and or an Expiry Date Range. Any of these fields or a combination of them can be used as additional information for the search.

Selecting the Search button on this form will initiate the process of finding all Licences that match the criteria used on ALL the Additional Filter Options AND the Licence Search Profile form.

Selecting the OK button on this form saves the Search Criteria entered on this form and returns to the Additional Licensing Filters form to allow the User to select another Additional Filter Option.



Additional Consents Filter Form

Class Details - Description

This field displays the Class Description and cannot be maintained.

Consents Details - Consent

If a particular Consent is required for the Search then the Consent Code can be entered into this field or the Pop Up button can be used to display a list of valid Consent Codes. Only One Consent can be selected for the Search.

This field can be used on its own or in conjunction with the other fields on this form. This field is not a mandatory field and can therefore be left blank.

Consents Details - Nature

If a particular Nature is required for the Search then the Nature Code can be entered into this field or the Pop Up button can be used to display a list of valid Nature Codes. Only One Nature Code can be selected for the Search.

This field can be used on its own or in conjunction with the other fields on this form. This field is not a mandatory field and can therefore be left blank.

Consents Details – Lodgement Date

If Consents with a particular Lodgement Date are required for the Search then a range of Lodgement Dates can be entered. As the Lodgement Date search consists of two fields the User is required to enter in a Start and End Date. This range is then used to determine if the Lodgement Date on the Consent falls within the range that has been nominated.

This field can be used on its own or in conjunction with the other fields on this form. This field is not a mandatory field and can therefore be left blank.

Consents Details – Application Date

If Consents with a particular Application Date are required for the Search then a range of Application Dates can be entered. As the Application Date search consists of two fields the User is required to enter in a Start and End Date. This range is then used to determine if the Application Date on the Consent falls within the range that has been nominated.

This field can be used on its own or in conjunction with the other fields on this form. This field is not a mandatory field and can therefore be left blank.

Consents Details – Expiry Date

If Consents with a particular Expiry Date are required for the Search then a range of Expiry Dates can be entered. As the Expiry Date search consists of two fields the User is required to enter in a Start and End Date. This range is then used to determine if the Expiry Date on the Consent falls within the range that has been nominated.

This field can be used on its own or in conjunction with the other fields on this form. This field is not a mandatory field and can therefore be left blank.

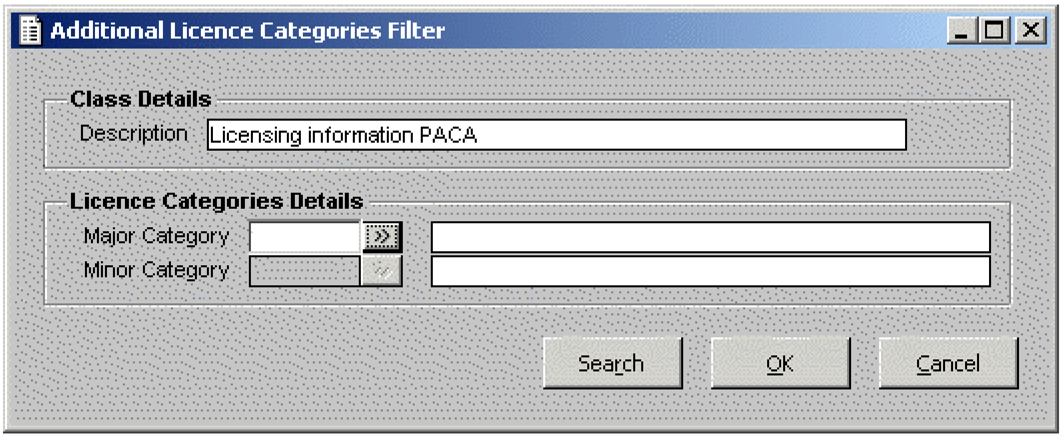
Additional Licence Categories Filter Form

The Additional Licence Categories Filter form allows additional search criteria to be nominated using a Licence Category. The User has the ability to nominate the Major and or Minor Licence Category that is to be used for the search.

Within this function only the selection of a single Major Category with a single Minor Category is permitted. This is due to technical limitations.

Selecting the Search button on this form will initiate the process of finding all Licences that match the criteria used on ALL the Additional Filter Options AND the Licence Search Profile form.

Selecting the OK button on this form saves the Search Criteria entered on this form and returns to the Additional Licensing Filters form to allow the User to select another Additional Filter Option.



Additional Licence Categories Filter Form

Class Details - Description

This field displays the Class Description and cannot be maintained.

Licence Categories Details – Major Category

Enter in the required Major Category that is to be included in the search. If the Major Category Code is not known then the Pop Up button can be used to display a list of the Major Categories. Once the Major Category has been selected then the Minor Category field becomes available for entry of a Minor Category Code. Note that entry of a Minor Category is not required for the search to be conducted.

Licence Categories Details – Minor Category

Upon entry to this form the Minor Category field is not input capable. For a Minor Category to be nominated for a search the Major Category must be selected first. Once the Major Category has been selected then the Minor Category field becomes available for entry of the Minor Category Code. If the Minor Category Code is not known then the Pop Up button can be used to display a list of the Minor Categories for the nominated Major Category.

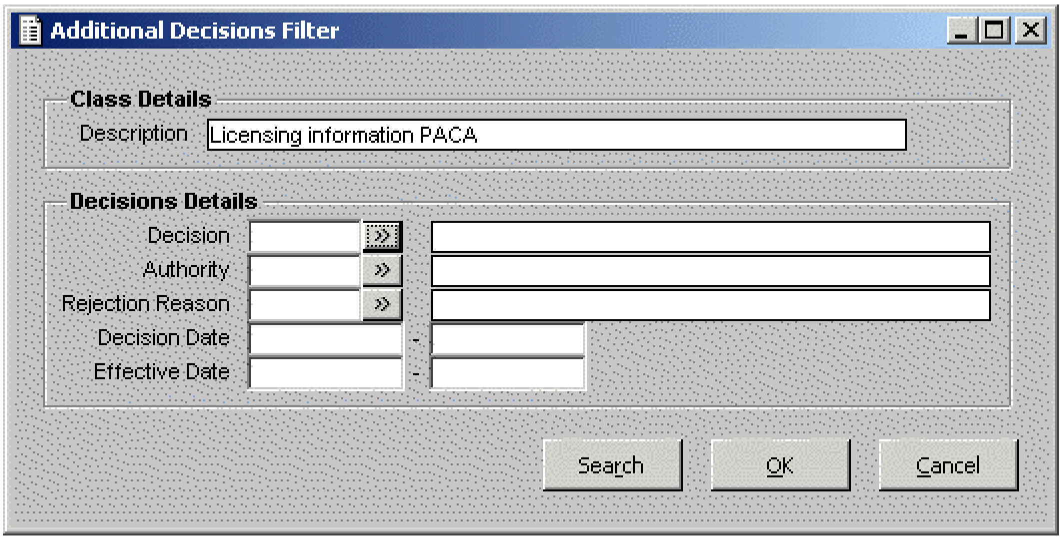
Note that entry of a Minor Category is not required for the search to be conducted.

Additional Decisions Filter Form

The Additional Decisions Filter form allows additional search criteria to be nominated using Decisions. The options available for searching over are Decision, Authority, Rejection Reason, a Decision Date Range, and or an Effective Date Range. Any of these fields or a combination of them can be used as additional information for the search.

Selecting the Search button on this form will initiate the process of finding all Licences that match the criteria used on ALL the Additional Filter Options AND the Licence Search Profile form.

Selecting the OK button on this form saves the Search Criteria entered on this form and returns to the Additional Licensing Filters form to allow the User to select another Additional Filter Option.



Additional Decisions Filter Form

Class Details - Description

This field displays the Class Description and cannot be maintained.

Decisions Details - Decision

If a particular Decision is required for the Search then the Decision Code can be entered into this field or the Pop Up button can be used to display a list of valid Decision Codes. Only One Decision can be selected for the Search.

This field can be used on its own or in conjunction with the other fields on this form. This field is not a mandatory field and can therefore be left blank.

Decisions Details - Authority

If a particular Authority is required for the Search then the Authority Code can be entered into this field or the Pop Up button can be used to display a list of valid Authority Codes. Only One Authority can be selected for the Search.

This field can be used on its own or in conjunction with the other fields on this form. This field is not a mandatory field and can therefore be left blank.

Decisions Details – Rejection Reason

If a particular Rejection Reason is required for the Search then the Rejection Reason Code can be entered into this field or the Pop Up button can be used to display a list of valid Rejection Reason Codes. Only One Rejection Reason can be selected for the Search.

This field can be used on its own or in conjunction with the other fields on this form. This field is not a mandatory field and can therefore be left blank.

Decisions Details – Decision Date

If Decisions with a particular Decision Date are required for the Search then a range of Decision Dates can be entered. As the Decision Date search consists of two fields the User is required to enter in a Start and End Date. This range is then used to determine if the Decision Date on the Decision falls within the range that has been nominated.

This field can be used on its own or in conjunction with the other fields on this form. This field is not a mandatory field and can therefore be left blank.

Decisions Details – Effective Date

If Decisions with a particular Effective Date are required for the Search then a range of Effective Dates can be entered. As the Effective Date search consists of two fields the User is required to enter in a Start and End Date. This range is then used to determine if the Effective Date on the Decision falls within the range that has been nominated.

This field can be used on its own or in conjunction with the other fields on this form. This field is not a mandatory field and can therefore be left blank.

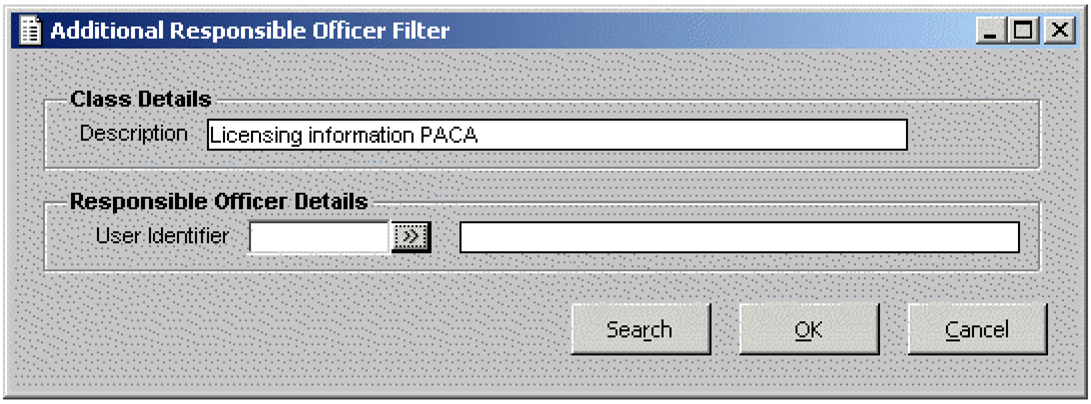
Additional Responsible Officer Filter Form

The Additional Responsible Officer Filter form allows additional search criteria to be nominated using a Responsible Officer. The User is able to enter in the required Responsible Officer or use the Pop Up button to display a list of valid Responsible Officers.

The Responsible Officer nominated on this Filter form will be used to find those Licences that have this Responsbile Officer as a Responsible Officer for the actual Licence.

Selecting the Search button on this form will initiate the process of finding all Licences that match the criteria used on ALL the Additional Filter Options AND the Licence Search Profile form.

Selecting the OK button on this form saves the Search Criteria entered on this form and returns to the Additional Licensing Filters form to allow the User to select another Additional Filter Option.



Additional Responsible Officer Filter Form

Class Details - Description

This field displays the Class Description and cannot be maintained.

Responsible Officer Details – User Identifier

Enter in the required Responsible Officer Identifier that is to be included in the search. If the Responsible Officer Identifier Code is not known then the Pop Up button can be used to display a list of the Responsible Officers.

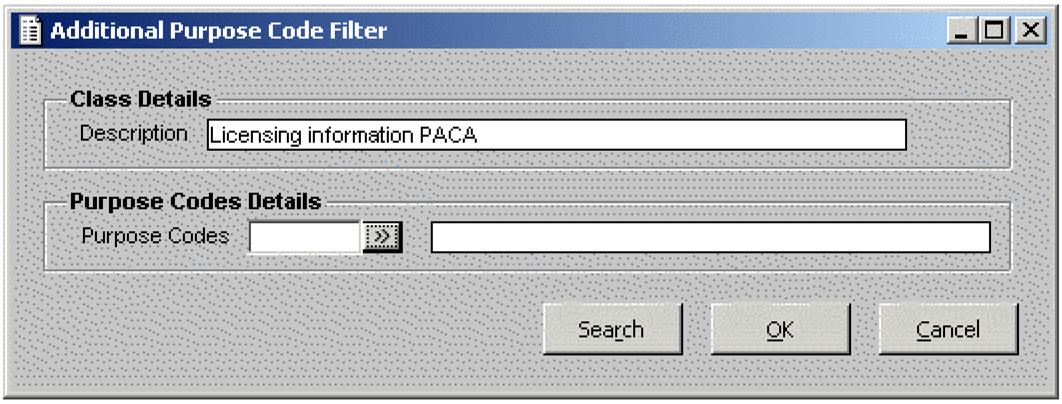
This Responsible Officer will be used to find Licences that have the Officer nominated within the Responsible Officers listed on the Summary Form for the Licence.

Additional Purpose Code Filter Form

The Additional Purpose Code Filter form allows additional search criteria to be nominated using Purpose Codes.

Selecting the Search button on this form will initiate the process of finding all Licences that match the criteria used on ALL the Additional Filter Options AND the Licence Search Profile form.

Selecting the OK button on this form saves the Search Criteria entered on this form and returns to the Additional Licensing Filters form to allow the User to select another Additional Filter Option.



Additional Purpose Code Filter Form

Class Details - Description

This field displays the Class Description and cannot be maintained.

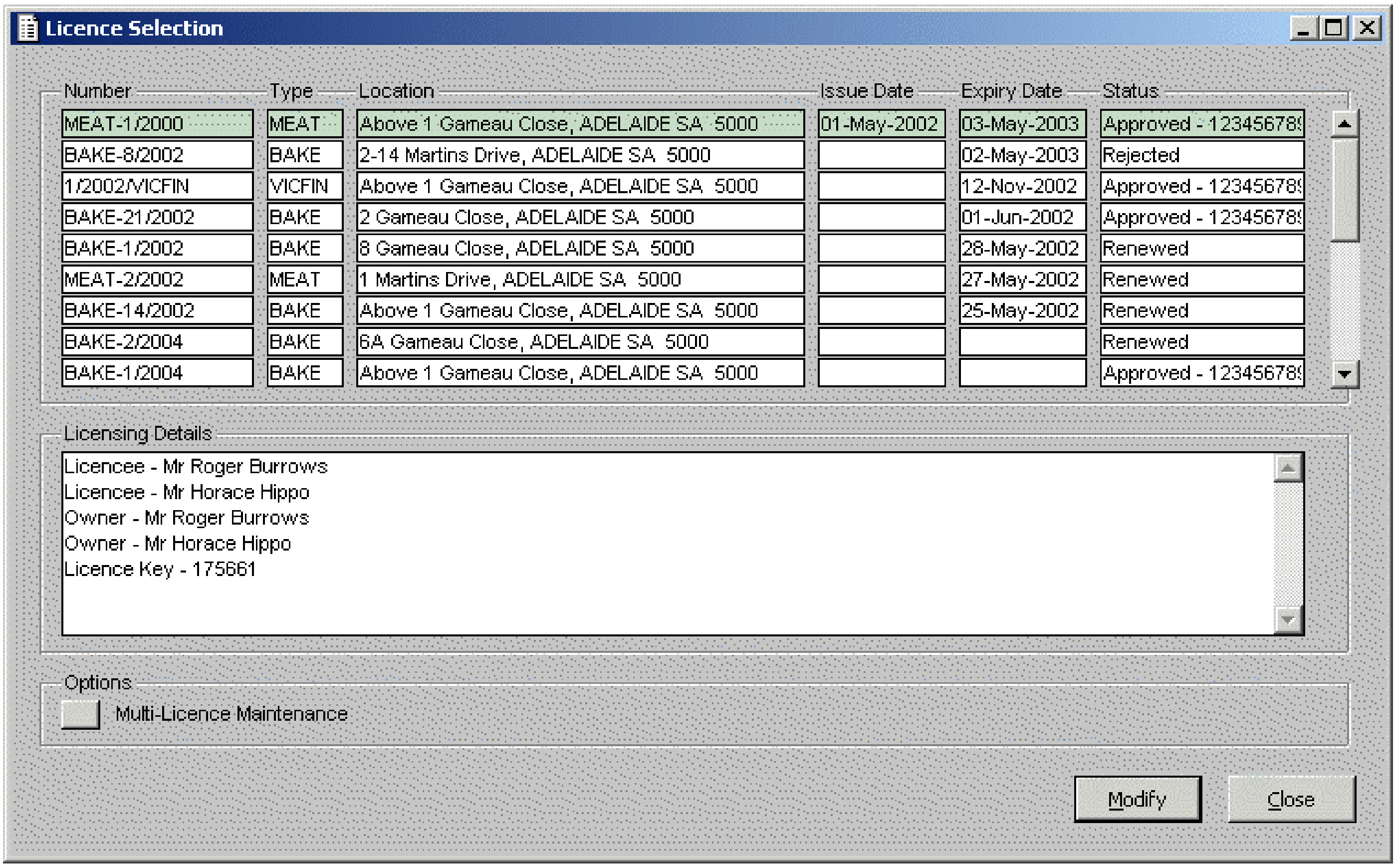
Purpose Code Details – Purpose Code

If a particular Purpose Code is required for the Search then the Purpose Code can be entered into this field or the Pop Up button can be used to display a list of valid Purpose Codes. Only One Purpose Code can be selected for the Search.

Licence Selection

Licence Selection Form

The Licence Selection form gives details of the Licences that have met the particular Criteria selected in the Search Profile. The Licences may then be selected and modified.



Licence Selection Form

Number
This field shows the actual number allocated to each Licence.

Type
This field shows the Code given to each Licence Type.

Description
The Description field details the information entered against each Licence

Location
This field details the actual Location that the Licence has been lodged against.

Issue Date
This field details the date that the Licence has been lodged on.

Expiry Date
This field details the date that the Licence has or will expire on.

Status

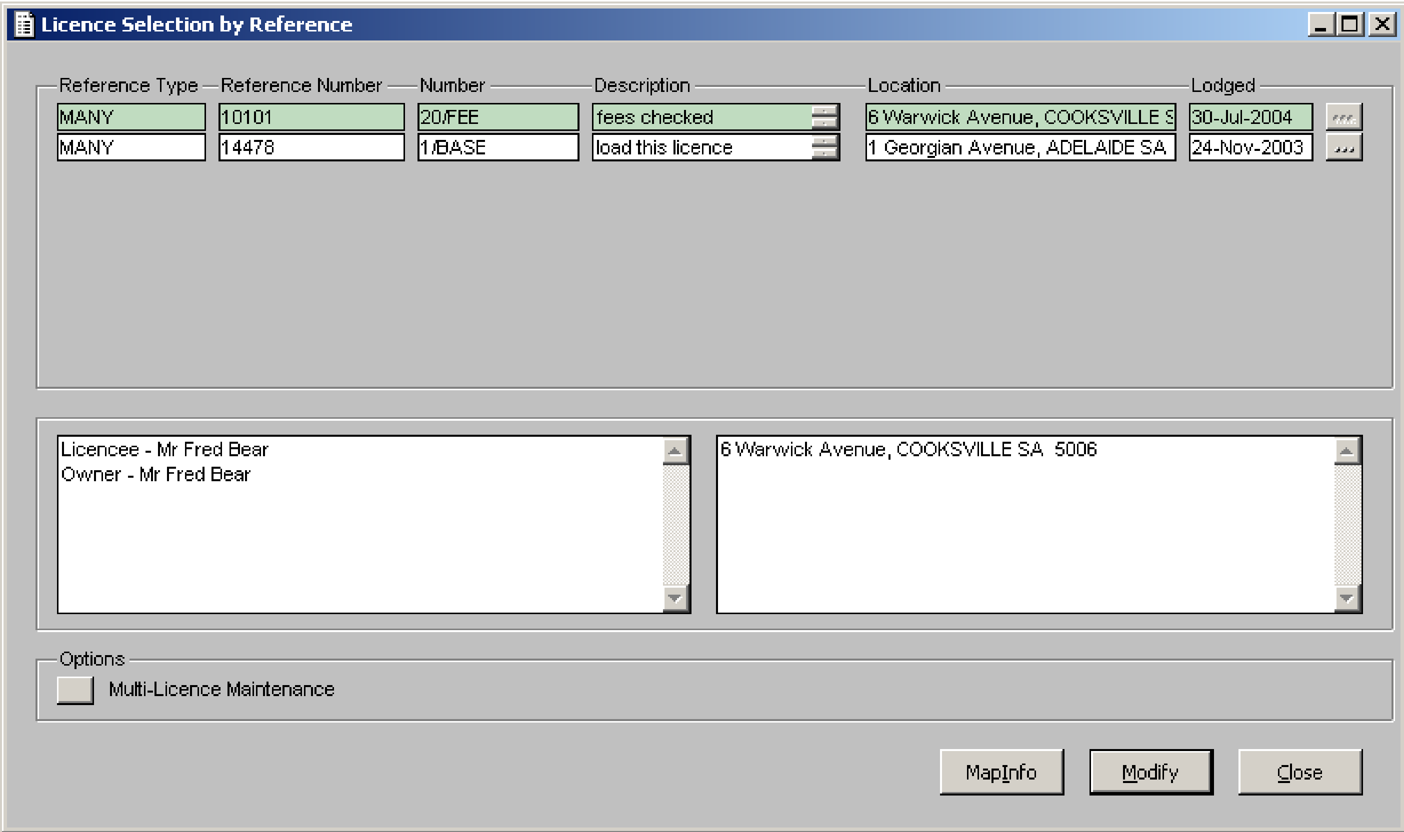
This field displays the actual Status of each Licence. For Example, it may be “Lodged”, “Under Assessment”, “Completed” etc.

Licensing Details
This box displays Licence information such as the Licence Location, for the highlighted Licence from above. The last line of the Details section displays the internal TPK number on the entity LAPAPPL for this Licence. This is referenced as the ‘Licence Key’.

Options – Multi Licence Maintenance
Selection of the Multi Licence Maintenance button will display the Multi Licence Options form. From here the User is able to nominate the Options that are to be maintained for the Licences that have been highlighted on the Selection Form. The User will only have to enter the detail for each Option selected once and it will update all the selected Licences with this information.

Licence Selection Form - Selected By Reference

The Licence Selection form gives details of the Licensing that have met the particular Criteria selected in the Search Profile. The Licensing may then be selected and modified.



Licence Selection By Reference Form

Reference Type
This field shows the actual Reference Type allocated to each Licence.

Reference Number
This field shows the Number given to each Reference.

Number
The Number field details the actual number of each Licence

Description
This field details the actual Description of the Licence.

Location
This field details the Location that the Licence has been lodged on.

Lodged
This field displays the actual Date the Licence was Lodged.

Detail Option
The Detail Button allows the User to detail out onto the Reference being displayed. This is only available when the Reference has been linked to many and is not a single entry. The Select Licences by Reference form will be displayed allowing selection of the applicable Licence.

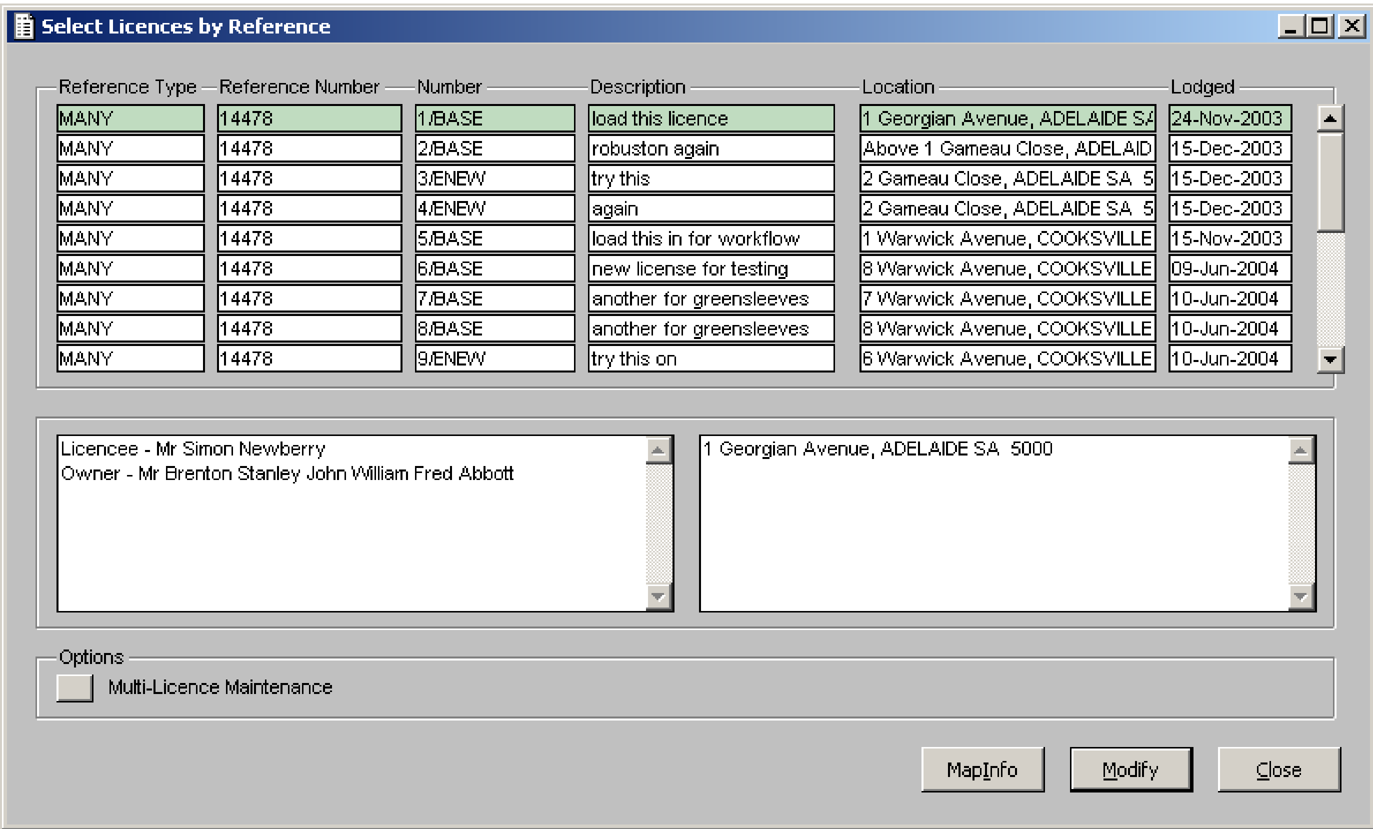
Licence Details
This box will display Licence information on the highlighted Licence from above.

Location Details
This box will display Licence Location information on the highlighted Licence from above.

Options – Multi Licence Maintenance
Selection of the Multi Licence Maintenance button will display the Multi Licence Options form. From here the User is able to nominate the Options that are to be maintained for the Licences that have been highlighted on the Selection Form. The User will only have to enter the detail for each Option selected once and it will update all the selected Licences with this information.

Licence Selection Form - Select Licences By Reference

The Licence Selection by Reference form gives details of the Licences that have been assigned to the same Reference Type and Number. The Licences may then be selected and modified.



Select Licencess by Reference Form

Reference Type
This field shows the actual Reference Type allocated to each Licence.

Reference Number
This field shows the Number given to each Reference.

Number
The Number field details the actual number of each Licence.

Description
This field details the actual Description of the Licence.

Location
This field details the Location that the Licence has been lodged on.

Lodged
This field displays the actual Date the Licence was Entered.

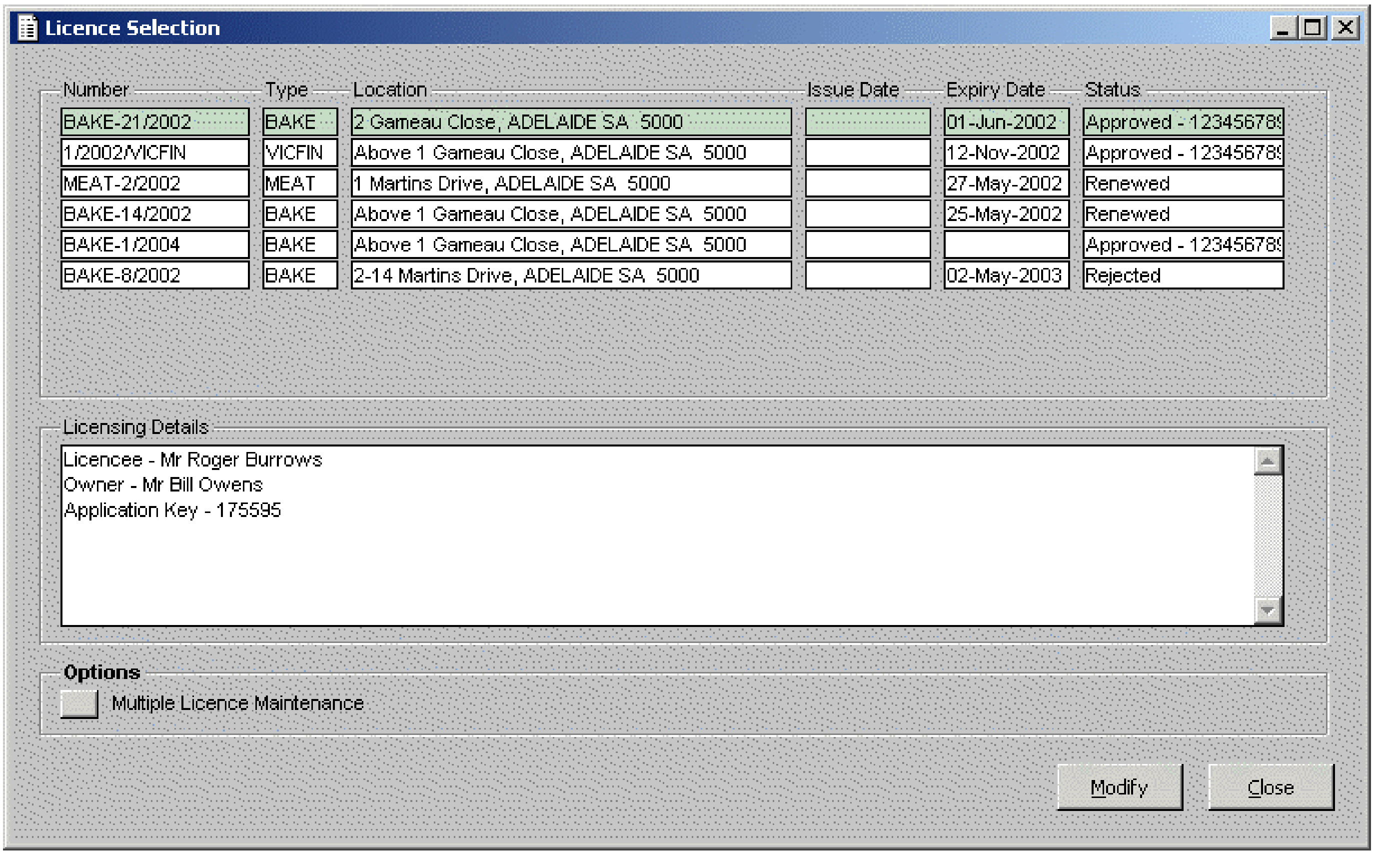
Licence Details
This box will display Licence information on the highlighted Licence from above.

Location Details
This box will display Licence Location information on the highlighted Licence from above.

Options – Multi Licence Maintenance
Selection of the Multi Licence Maintenance button will display the Multi Licence Options form. From here the User is able to nominate the Options that are to be maintained for the Licences that have been highlighted on the Selection Form. The User will only have to enter the detail for each Option selected once and it will update all the selected Licences with this information.

Licence Selection Form - Selected By Additional Filter

The Licence Selection form gives details of the Licences that have met the particular Criteria selected in the Search Profile and the Additional Filters. The Licences may then be selected and modified.



Licence Selection by Additional Filters Form

Number
The Number field details the actual number of each Licence

Type
This field details the actual Type of Licence.

Location
This box will display Licence Location information on the highlighted Licence from above.

Issue Date
This field displays the actual Date the Licence was issued.

Expiry Date
This field displays the Date the Licence will expire or the date the Licence has expired on.

Last Inspection
This field displays the Last Inspection Date of the Licence. This date will only appear if an Inspection has been carried out.

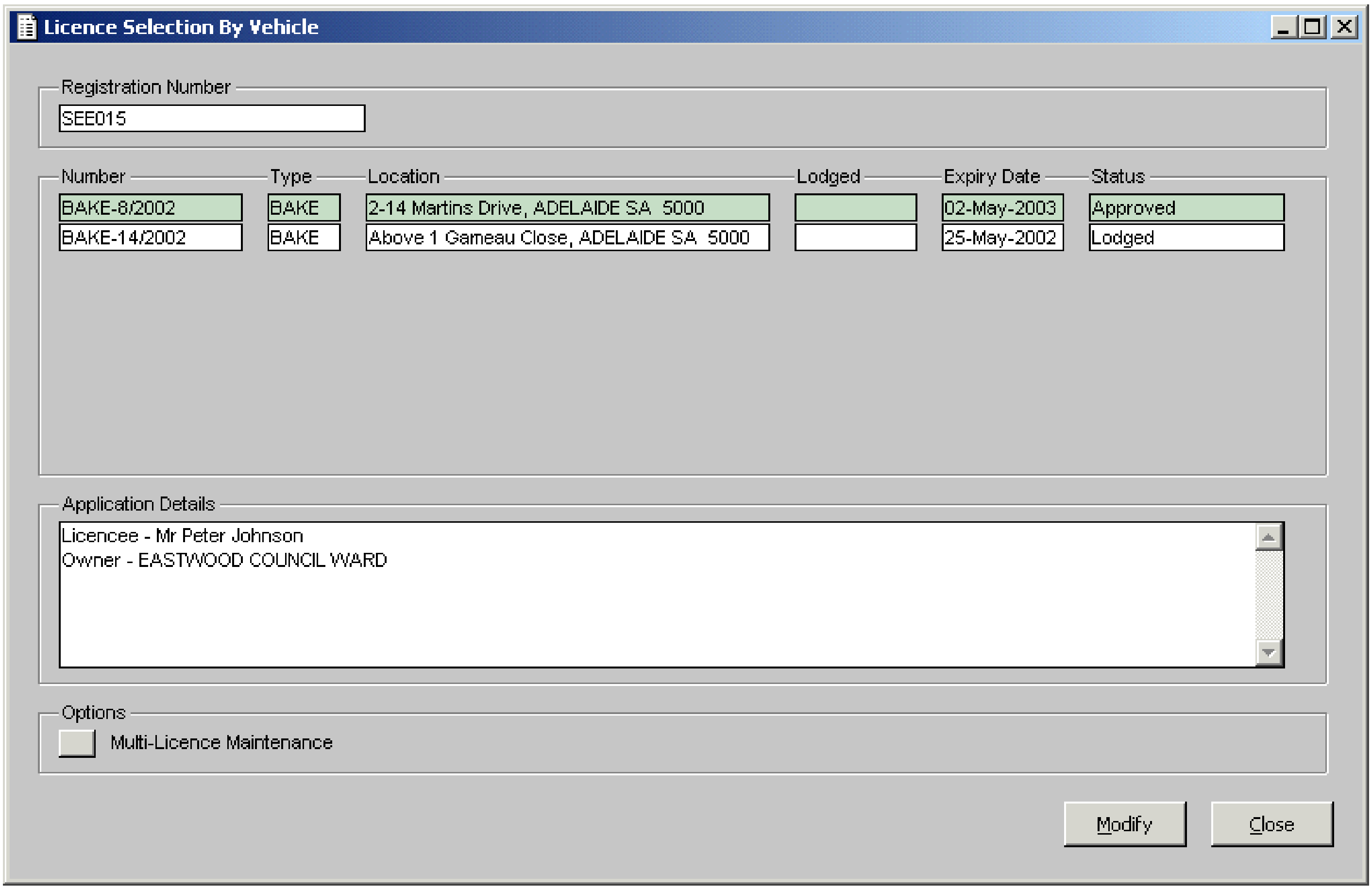
Status
This field displays the actual Status of each Licence. For Example, it may be “Lodged”, Under Assessment, “Completed” etc.

Licensing Details
This box will display the Licencee names for the highlighted Licence above.

Options – Multi Licence Maintenance
Selection of the Multi Licence Maintenance button will display the Multi Licence Options form. From here the User is able to nominate the Options that are to be maintained for the Licences that have been highlighted on the Selection Form. The User will only have to enter the detail for each Option selected once and it will update all the selected Licences with this information.

Licence Selection Form - Vehicle Details

The Licence Selection form gives details of the Licences that have met the particular Criteria selected in the Search Profile. The Licence may then be selected and modified.



Licence Selection by Vehicle Form

Registration Number
This field details the Street previously selected in the Search Profile.

Number
The Number field details the actual number of each Licence

Type
This field displays the code of the Licence Type displayed.

Location
This field details the Location of the Licences selected.

Lodged
This field details the Lodged date of the Licence.

Expiry Date
This field details the Expiry Date that has been calculated for each Licence.

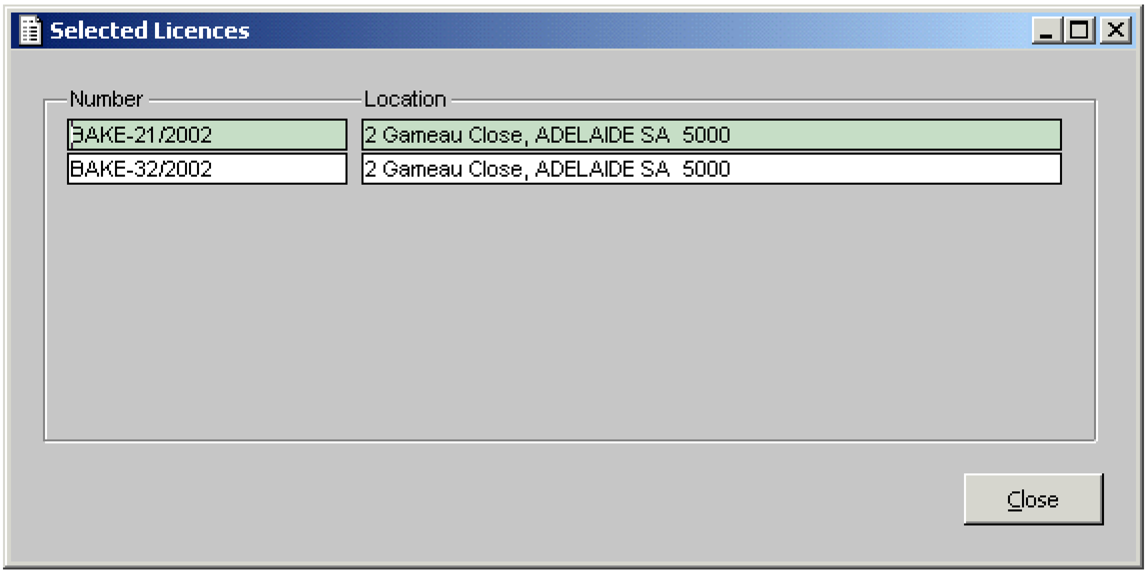
Status
This field displays the current status of each Licence.

Licence Details
This Summary details box displays information about each Licence. Further information may be seen by using the scroll bar on the right hand side of the form.

Options – Multi Licence Maintenance
Selection of the Multi Licence Maintenance button will display the Multi Licence Options form. From here the User is able to nominate the Options that are to be maintained for the Licences that have been highlighted on the Selection Form. The User will only have to enter the detail for each Option selected once and it will update all the selected Licences with this information.

Selected Licences Form

The Selected Licence form gives details of the Licences that have been multi selected from a Selection Form and are to be updated using the Multi-Licence Maintenance Option. This form is displayed when the Detail Button has been selected on an Option that has been selected via the Multi-Licence Maintenance Option.



Selected Licences Form

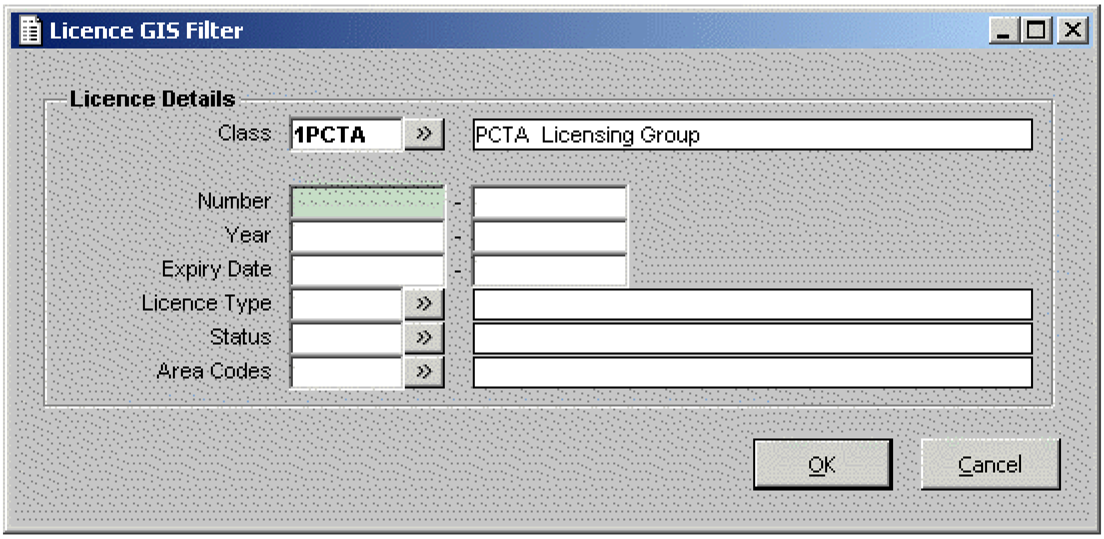
Number
This field displays the Licence Number that has been selected to be updated by the Multi-Maintenance Option.

Location
This field details the Primary Location of the Licences that have been selected to be updated by the Multi-Maintenance Option.

Licence GIS Filter

Licence GIS Filter Form

The Licence GIS Filter Form is displayed when properties have been highlighted on the GIS map and the User has requested to display Licensing Information for the selected properties.



Licence GIS Filter Form

Licence Details - Class

The Licence Class defaults to that of the last Licence Class used by the User. This can be changed to the required Class by entering in the Class Code or using the Pop Up to select the required Class.

Licence Details - Number

If a particular Licence Number is required or a range of Numbers, then enter in the Number criteria in these fields. These fields can be left blank.

Licence Details - Year

If a particular Year is required or a range of Years then enter in the Year criteria in these fields. These fields can be left blank.

Licence Details – Expiry Date

If a particular Expiry Date is required or a range of Expiry Dates, then enter in the Expiry Date criteria in these fields. These fields can be left blank.

Licence Details – Licence Type

If a particular Licence Type is required then enter in the required Type or use the Pop Up to display a list of available Licence Types. This field can be left blank.

Licence Details - Status

If only particular Licences with a certain Status are required, then enter in the required Status or use the Pop Up to display a list of available Licence Status. This field can be left blank.

Licence Details – Area Codes

If particular Licences with a certain Area Code are required, then enter in the required Area Code or use the Pop Up to display a list of available Licence Areas. This field can be left blank.

Maintenance Summary

Licensing Summary Form

The Licence Summary Form display relevant information pertaining to the Licence that has been selected. This form enables the Licence to modified via a series of options buttons, located both on the main form itself, or by selecting the Options Button at the bottom of the form and then detail out further to each of the options available. The options are detailed below.

The Summary Form also provides a Workflow Menu at the top of the screen. The Workflow displays the following options;

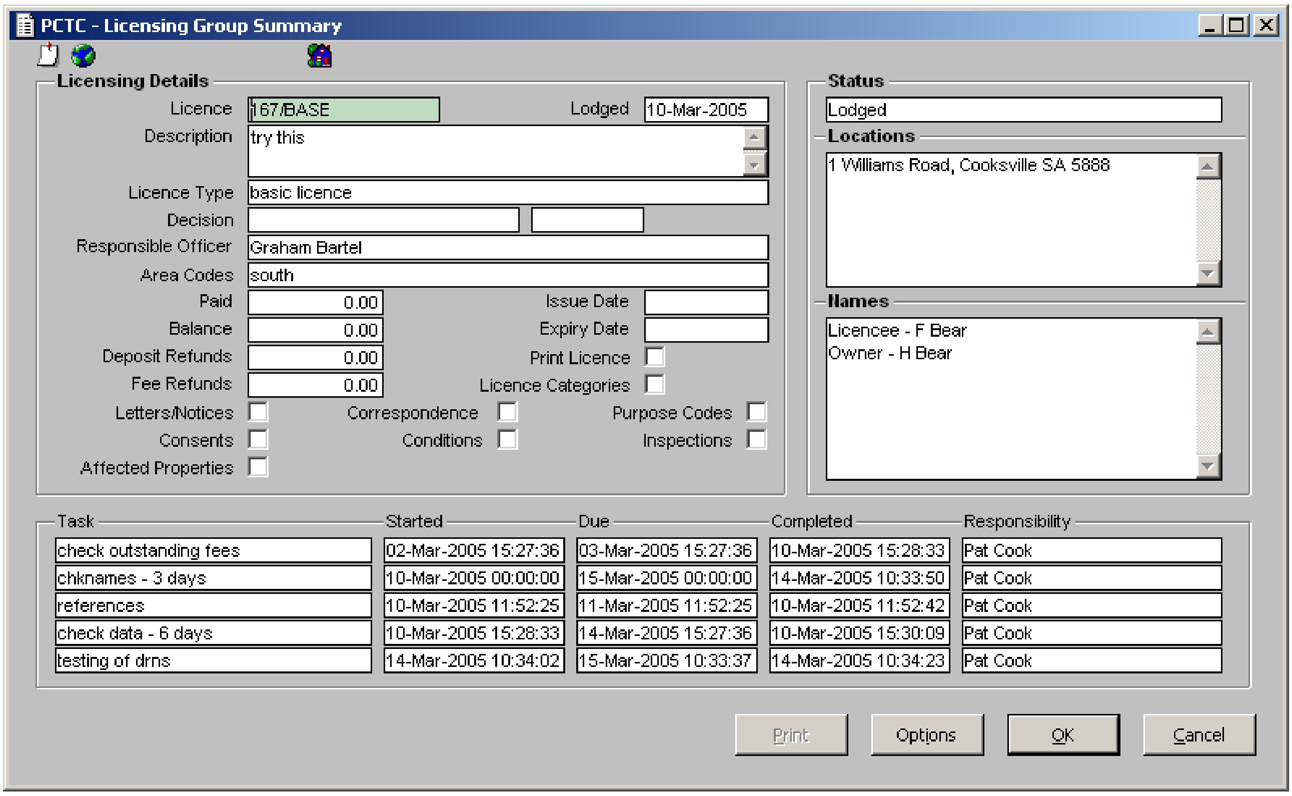
- Workflow -
- Task Detail
- Continue Task
- Complete Task
- Repeat Task
- Insert Task
- Insert Procedure
- Timesheet

Please note that when focus is placed on each task the options displayed will vary. In particular when a task has been started the options will not display the ‘delete task’, as a User cannot delete a task once it has been started.

For more information please refer to the Workflow User Guide.

If the Application is related to another Application or has had Amended, Staged or Related Applications against it then a Glyph is displayed on the summary form informing the User of this situation. The User needs only to click on the Glyph and the Related Applications form is displayed.

A Glyph is also displayed for Related Licences for the Licence and the User needs only to click on the Glyph and the Related Licence form is displayed.



Licensing Summary Form

Licence
The Licence field displays the Licence Number and a Detailed Description on what the Licence is actually for.

Lodged
The Lodged field details the date that the Licence was actually lodged.

Description
The Description field details the type of Licence it is. For example this may be “Sidewalk Cafe”, “Residential Parking Permits” etc.

Licence Type
This field displays the actual Licence Type that has been assigned to the Licence.

Decision
This field shows the details of the Decision that has been given to this Licence. For example it may be “Approved”, “Rejected”, “Interim Approval” etc.

If the ‘Under Appeal’ checkbox has been flagged on within the Decision then the words ‘Under Appeal’ will display in bold next to this field.

Responsible Officer
This field details the Responsible Officer (s) assigned to this Licence. The Primary Responsible Officer is displayed first, followed by any other Responsible Officers that have also been assigned to the Licence.

Area Codes
This field details the Area Codes allocated to the Licence.

Paid
This field will display the dollar value of any payments made against the Licence.

Issue Date
This field displays the date that this particular Licence was issued.

Balance
This field displays the balance of money owed after any payments have been made against the Licence.

Where the Account Method for the Licence has been set to Pathway Debtors then this field will only reflect the Balance of Fees that have been Transferred to Debtors. Any Adjustments or new Fees that have been added but not transferred will not show in this Balance field.

Expiry Date
This field will display a date that the Licence expires on. An expiry date will only be shown once a Consent has been added to the Licence.

Deposit Refunds
This field will display the dollar value of any money that has been Refunded against a Deposit Fee on this particular Licence.

Print Licence
If this box is clicked on you will be taken to the Licence Data Maintenance form.

Licence Categories
If this has been checked it indicates that this particular Licence has had Licence Categories entered against it. Clicking on this field will detail out to the Major Licence Categories Maintenance Form.

Fee Refunds
This field will display the dollar value of any money that has been Refunded against a Licence Fee on this particular Licence.

Letters/Notices
If this has been checked it indicates that this particular Licence has had Letters entered against it. Double clicking on this field will detail out to the Letters Selection Form.

Correspondence
If this has been checked it indicates that this particular Licence has had Responses entered against it. Double clicking on this field will detail out to the Responses Selection Form.

Purpose Codes
If this has been checked it indicates that this particular Licence has had Purpose codes entered against it. Clicking on this field will detail out to the Purpose Codes Maintenance Form

Consents
If this has been checked it indicates that this particular Licence has had Consents entered against it. Double clicking on this field will detail out to the Consent Selection Form.

Conditions
If this has been checked it indicates that this particular Licence has had Conditions entered against it. Double clicking on this field will detail out to the Conditions Selection Form.

Inspections
If this has been checked it indicates that this particular Licence has had Inspections entered against it. Double clicking on this field will detail out to the Inspections Selection Form.

Affected Properties
If this has been checked it indicates that this particular Licence has had Affected Properties entered against it. Double clicking on this field will detail out to the Affected Properties Form.

Food Safety Information

If this has been checked it indicates that this particular Licence has had Food Safety Information entered against it. Double clicking on this field will detail out to the Food Safety Information Maintenance Form. This option is only displayed when the FSI parameter has been flagged on in the Licence Type parameters.

Additionally the Premises Risk Level Code is displayed against this field.

Status
This field displays the current Status of this Licence. As detailed previously this may be “Completed”, “Under Assessment” etc

Locations

The Locations box details all Locations associated with this particular Licence. Double clicking on this box will detail out to the Locations Maintenance Form.

Names

The Names box details all Names that are associated with this particular Licence. Double clicking on this box will detail out to the Names Maintenance Form.

Task Details

This box details any Tasks that may have been assigned to the Licence at Licence Entry. Task may also be added manually.

NOTE: Where Timesheet Entry has been setup for Workflow, the User is able to focus on the Task requiring Timesheet Entry and select the Workflow / Timesheet Dropdown Option to continue entering in Timesheets or view any existing Timesheet Entries for the Task.

Started

This field will display a date in it, if the Task has actually been started.

Due

This field will display a date in it, of when the Task is due.

Completed

This field will display a date in it, if the Task has been completed.

Responsibility

This field will display the Responsible Group or Officer who is Responsible for the particular Task assigned to this Licence.

Print Button

Selecting the Print Button will print Licence details as per the Summary details attached at the Parameter level.

Licensing Options Forms

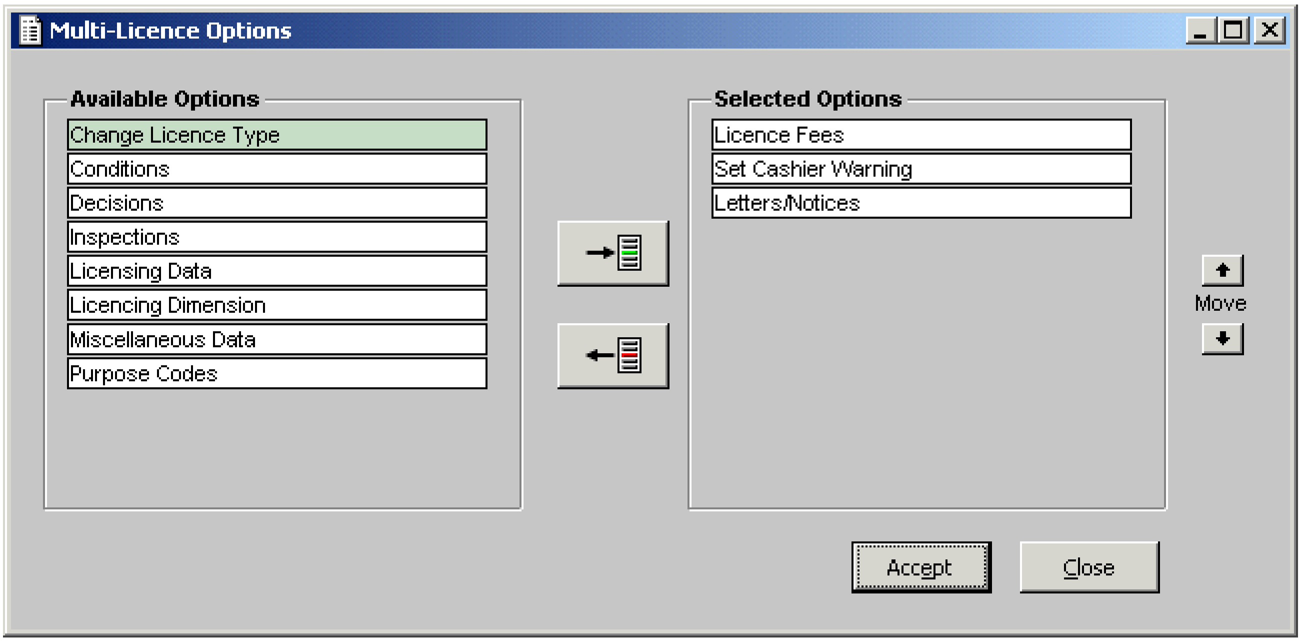
The following topics are covered in this section:

Licensing Maintenance

Multi-Licence Options Form

The Multi-Licence Options Form is displayed when the Multi-Licence Maintenance Option Button has been selected from one of the Licence Selection Forms. It allows the User to nominate which Options are to be maintained and updated on the Licences that have been Multi-Selected on the Selection Form.

Once the User has selected the required Options the Accept Button will then take the User through the Options selected to allow maintenance to be performed.



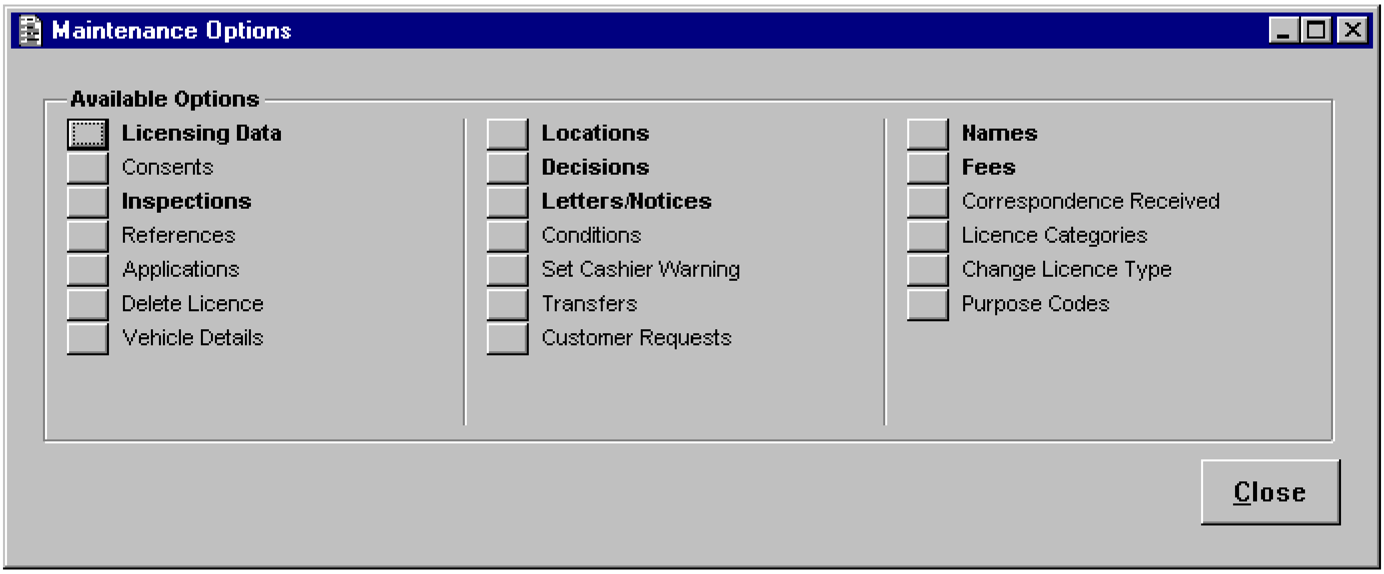
Multi-Licence Options Form

Available Options
The Available Options are displayed under this Heading. Highlight the Option that is required to be carried out and move it to the Selected Options field. More than one Option can be selected for Maintenance. However the Options can only be moved to the Selected Heading one at a time.

Selected Options
The Selected Options are displayed under this Heading. More than one Option can be selected for Maintenance

Licence Maintenance Options Form

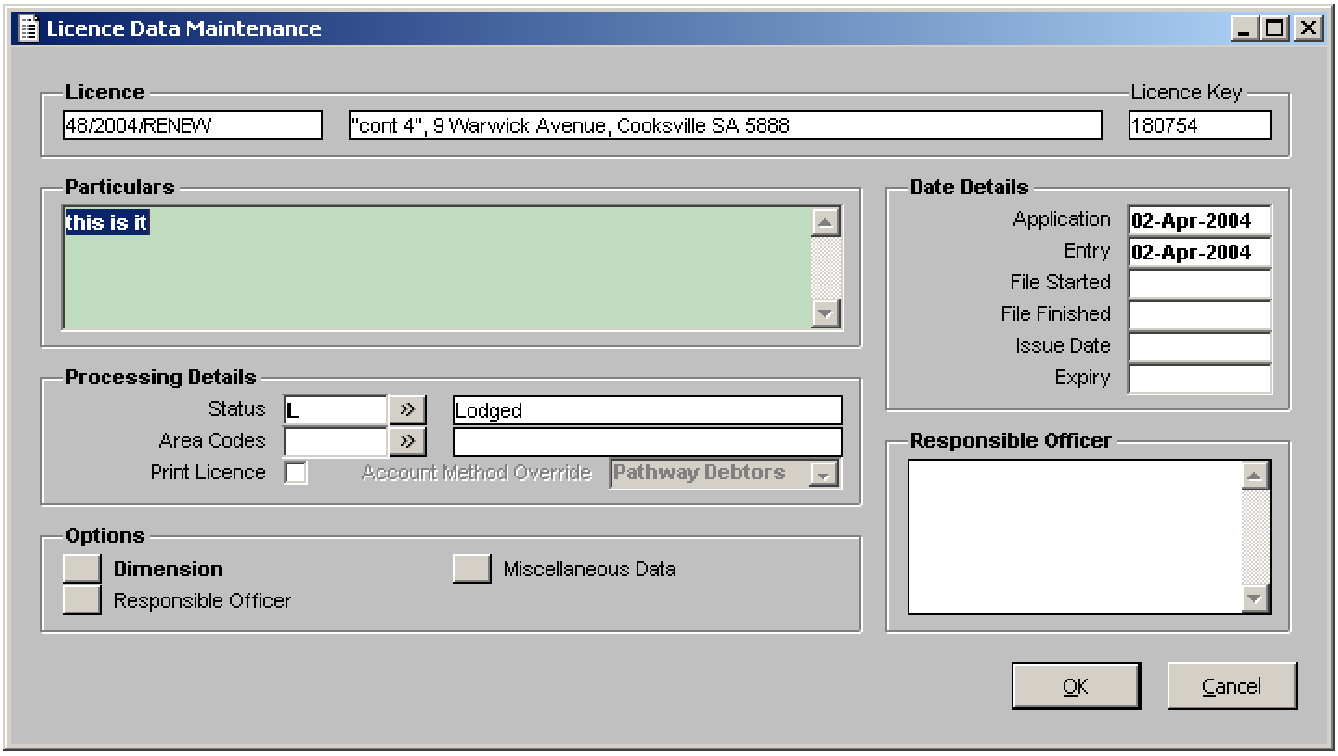
Licensing Maintenance Options may be selected from the Licence Summary screen, either via the drop down menu, or the Options button.



Maintenance Options Form

Licensing Data

Licence Data Maintenance Form



Licence Data Maintenance Form

Licence
The Licence Fields are made up of two sections. The First being the actual Licence Number selected and the second being the location of the Licence.

Licence Key
The Licence Key is the internal TPK number on the entity LAPAPPL for this Licence.

Particulars
The Description Field is a multi-line field detailing information about the Licence. This may be what Type of Licence it is, or description that may help in the Processing of this Licence.

Date Details
The Date Details Fields Consist of Various Fields detailed below:-

Licence
This Field details the Actual Date that the Licence was received.

Licence Entry
This Field details the Date that the Licence was Lodged onto the Computer.

File Started
This Field details the Date that the Physical File was started for the Licence.

File Finished
This Field details the Date that the Physical File was finished for the Licence.

Issue Date

This field details the date the Licence was issued.

Expiry

This Field details the actual Expiry Date for this Licence.

Status

The Status Field details exactly at what stage the Licence is currently at. This may be any Status Type. For Example, it may be Under Assessment, Lodged, Awaiting Further Information, etc. Status Codes are set up as part of the Parameter Section.

If the Status Code is known, it may be keyed into this field automatically, or the Pop Up Button selected to choose from the Pre-defined list.

Area Codes

The Area Codes may contain the details of the Particular Group that will be responsible for Processing this Licence. Some Councils may have several different locations, such as a Depot, or Branch Office. By Setting up Area Codes particular Licensing may be Processed at each group.

If the Group is known, it may keyed directly into the field, or the Pop Up Button can be clicked to choose from a Pre-defined List.

Print Licence

This field will only be displayed on the maintenance form, if a Merge Type for a Licence Print has been set up at parameter level. If checked on then the User is able to automatically print a Licence once an Approval Decision has been entered.

Processing Details – Account Method Override

The Account Method Override field is displayed on the Licence Data Maintenance Form to enable the User to see the Accounting Method that has been defined as the Account Method at the time of Lodgement.

Where no Fee has been added to the Licence then upon entering the Data Maintenance Form this field is ‘greyed’ to inform the User that this is the Default Account Method for the Class. If the User selects another available Account Method then the field is shown as normal.

NOTE: Once the Account Method has been set and fees added to the Licence then the Account Method field will become non-editable and will not be able to be changed.

NOTE: When the Account Method for a Licence has been set to Pathway Debtors then it is necessary for any Receipts to be raised against the Debtor Invoice and not against the Licence. These Receipts will need to be created as DLC type Receipts with the Payment Reference being nominated in the Qualifier field. It will not be possible to receipt directly to the Licence.

When the Account Method for a Licence has been set to COM Debtors then no Receipts for the Licence should be raised in Pathway.

Options – Dimension, Miscellaneous Data and Responsible Officer

The Options section consists of three Buttons, the Dimensions Button, the Miscellaneous Data button and the Responsible Officer button.

When either of these buttons are selected it will detail to the particular Maintenance Form selected.

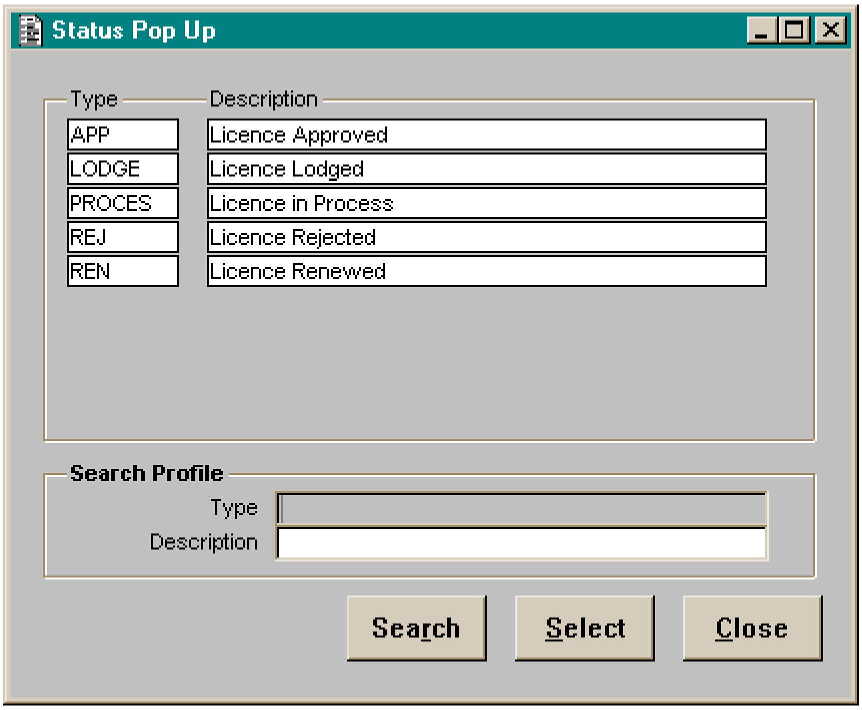
The Dimensions Form represents numeric data to be stored and is used for Calculations. Dimensions are assigned to a type of data, such as Licence, Building, Development or Subdivision. This determines which form will be accessed to record the detail.

Miscellaneous Data is additional general information that can be printed on letters.

The Responsible Officer form is used to identify the Officer (s) responsible for the Licence.

Status Pop Up Form

The Status Pop Up Form allows the User to select from a list of Predefined Status Codes. The Form consists of the following fields.



Status Pop Up Form

Type
This field lists the Code given to the Status.

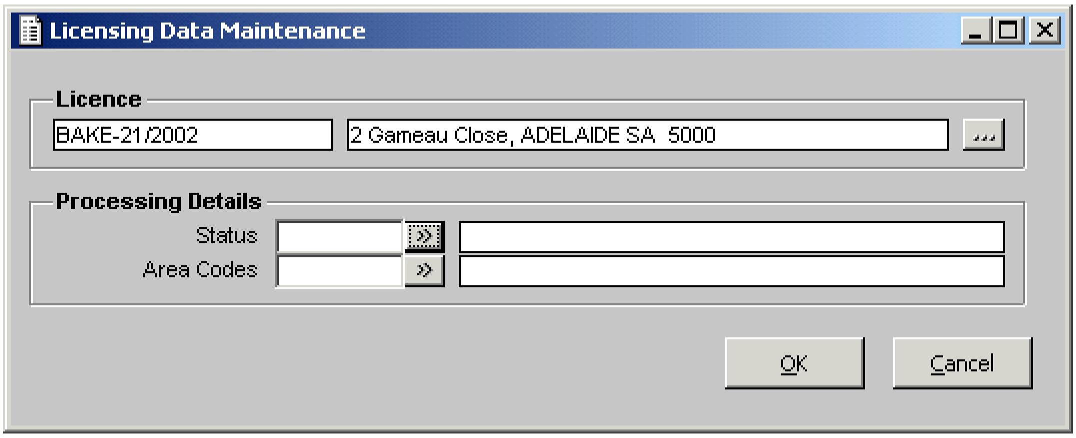
Description
This field details the full Description of the Status.

Search Profile - Type
This field allows the User to Search on a particular Status Type. The User may enter in a full or part Code, the select the Search Button to proceed with the Search.

Search Profile - Description
This field allows the User to Search on a particular Status Description. The User may enter in a full or part Description, the select the Search Button to proceed with the Search.

Licensing Data Maintenance Form – Multi-Maintenance Option

The Licensing Data Maintenance form allows the User to enter in the required Status or Area Codes (or Both) that the multi selected Licences are to be changed to.



Licensing Data Maintenance Form - Multi-Maintenance Option

Licence

The Licence Fields are made up of two sections. The First being the Licence Number selected and the second being the location of the Licence. A Detail Button is available for the User to display a list of the Licences that have been selected to be updated with this information.

Processing Details - Status

The Status Field allows the selection of the Status that is required for the Licences selected to be updated to. This may be any Status Type. For Example, it may be Under Assessment, Lodged, Awaiting Further Information, etc. Status Codes are set up as part of the Parameter Section.

If the Status Code is known, it may be keyed into this field automatically, or the Pop Up Button selected to choose from the Pre-defined list.

Area Codes

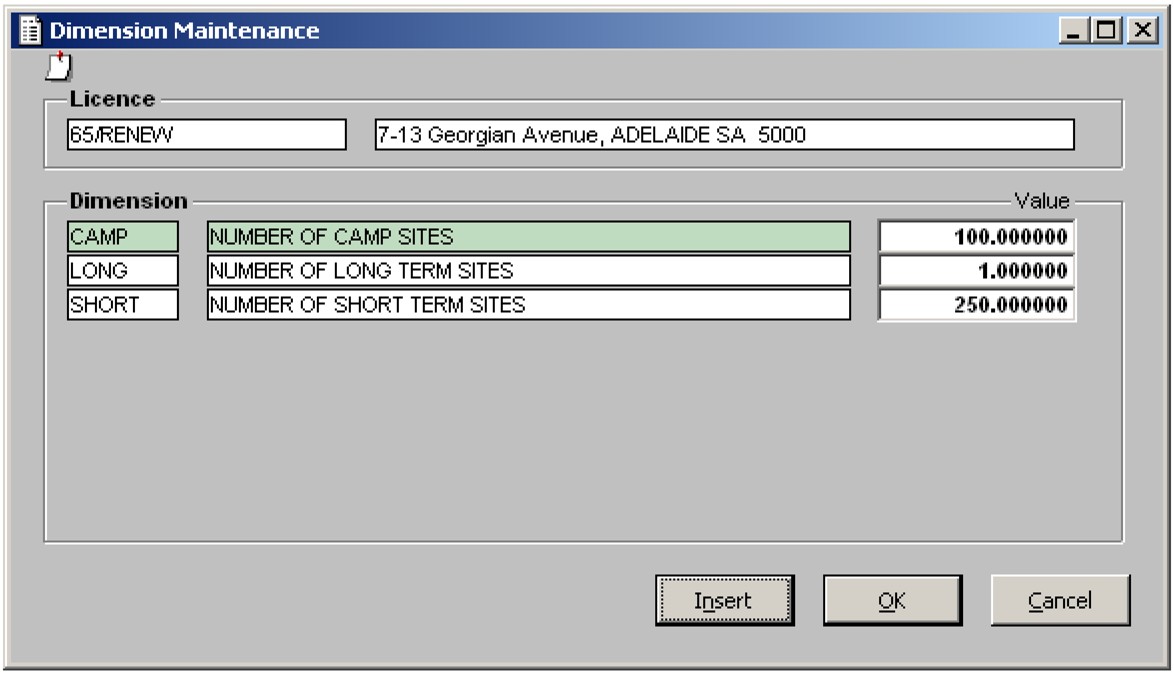
The Area Codes may contain the details of the Particular Group that will be responsible for Processing this Licence. Some Councils may have several different locations, such as a Depot, or Branch Office. By Setting up Area Codes particular Licensing may be Processed at each group.

If the Group is known, it may be keyed directly into the field, or the Pop Up Button can be clicked to choose from a Pre-defined List.

Dimension Maintenance Form

The Dimension Maintenance form enables the entry, or maintenance of Dimensions for the Licence. If the Dimension is associated to a Fee and is used in the calculation of that fee then changing the Dimension Value will prompt the uer to nominate whether the associated Fee is to be changed due to the new Value entered.

Refer to the Value field Help Text for further information on this process.



Dimension Maintenance Form

Licence

The Application Fields are made up of two sections. The First being the actual Licence Number selected and the second being the location of the Licence

Dimension

The Dimension field is the actual Code used to calculate the Fee. This field allows the direct keying of the dimension code if known, or select the Pop Up Button to choose from a list of Pre-defined Codes. Once the Dimension is selected, its full description will be placed in the box to the right of it.

Value

The Value field is used to actually key the Value of the Dimensions, whether it be a 'Dollar Value', 'number of floors to a building', 'number of car parks' etc.

If the Value of the Dimension is changed and this value is used in the calculation of a Licence Fee then the User is prompted with a message asking if the Fee is to be adjusted by the amount of the change (either up or down). The User can then either respond Yes to have the Fee adjusted or No and the Fee will not be changed.

NOTE: Only Fees that have not been Paid will be adjusted by the change of the Value and the User will only be prompted by the Message for the number of times that the affected Unpaid Fee appears on the Licence. For example if FEEA of 15.00 appears on the Licence 4 times, but 3 of these have been Paid then the User would only be prompted once to adjust the One outstanding FEEA entry. The remaining 3 Paid FEEAs would not be affected by the change of value.

NOTE: - When the Dimensions are associated to Fees that are interfaced to the Pathway Debtors Module the changing of the Value requires additional steps to be performed.

A change to a Dimension will not update a fee in debtors automatically. The following message is displayed when the Value is changed and outlines the process of correctly changing the dimension value –

"This Dimension cannot be changed as the Fee is a Debtors Fee. The original Dimension Fee has to be reduced down to zero and the Fee added again. When the Dimension form is displayed, update the dimension to the new value."

If Formats have been defined within the Parameters then the value entered in this field must conform to the Format.

If the value entered during Dimension Maintenance does not match the format defined at the Parameter level then an error message is displayed. The error message displays the correct format for the specified Dimension Type.

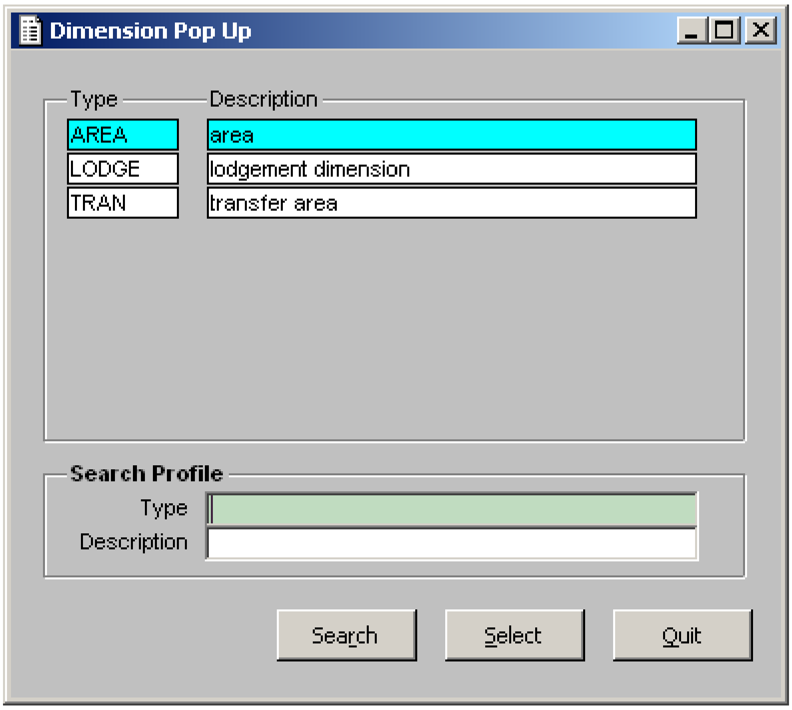
The characters Hash (#), Asterisk (*), and Decimal Point (.) can be used in the formatting. In conjunction with the Hash characters, Brackets can be used. The use of Brackets allows the format to be defined so that if numerics are entered they can be upto a certain value. Refer to the Table following for example of the characters and how they are applied to the Format field.

Hash	#	Specifies a digit must be entered for every # in the format
Asterisk	*	Any number of digits may be entered
Decimal Point	.	A decimal point must be entered as part of the number entered
Brackets	( )	Signifies that if a digit is entered then the number of digits that can be entered. The entry for the field can therefore be optional instead of mandatory.

Examples of this are:

Format ##	Valid Input/Output	12 but NOT 1
Format ###	Valid Input/Output	123 but NOT 12
Format ##.#	Valid Input/Output	12.1 but NOT 12.12
Format *.##	Valid Input/Output	3233.99, or 1.50 but NOT 3233.1
Format (#)(#)(#)	Valid Input/Output	1, or 12, or 123 but NOT 1234
Format *.(#)(#)	Valid Input/Output	1. or 123.1 or 1234.55 but NOT 1234.123

Dimension Pop Up Form



Dimension Pop Up Form

Type
The Dimension Type field displays the list of Coded Dimensions for selection.

Description

The Description field give the full details of the Coded Dimension. This may help in the Selection Process.

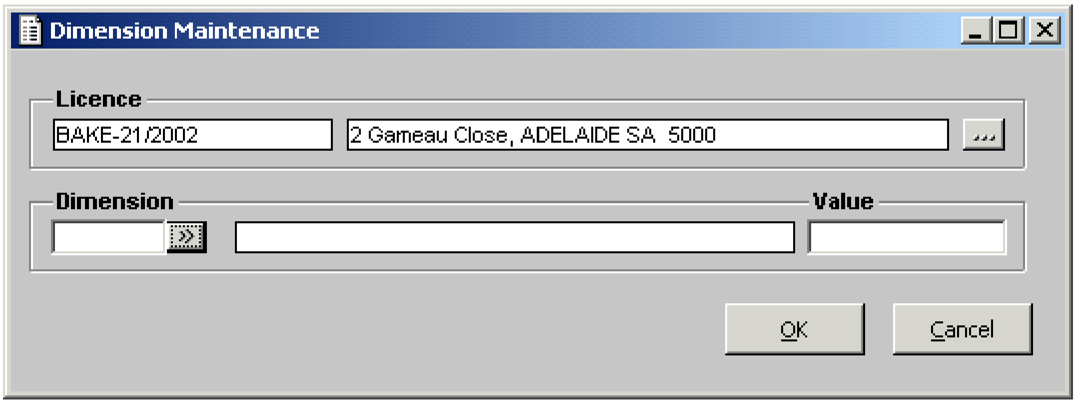
Search Profile - Type

The Search Profile Type field enables the User to key in a Dimension Type in full or with the use of Search Characters. The Search button should then be clicked to produce a list of Dimensions matching the requested Search.

Search Profile - Description

The Search Profile Description field enables the User to key in a Dimension Description in full or with the use of Search Characters. The Search button should then be clicked to produce a list of Dimensions matching the requested Search.

Dimension Maintenance Form – Multi-Maintenance Option



Dimension Maintenance Form - Multi-Maintenance Option

Licence

The Licence fields are made up of two sections. The First being the Licence Number selected and the second being the location of the Licence. A Detail Button is displayed when the Multi-Maintenance Option has been selected from a Selection Form. This allows the User to display the Licences that have been selected to be updated with the Dimension information.

Dimension

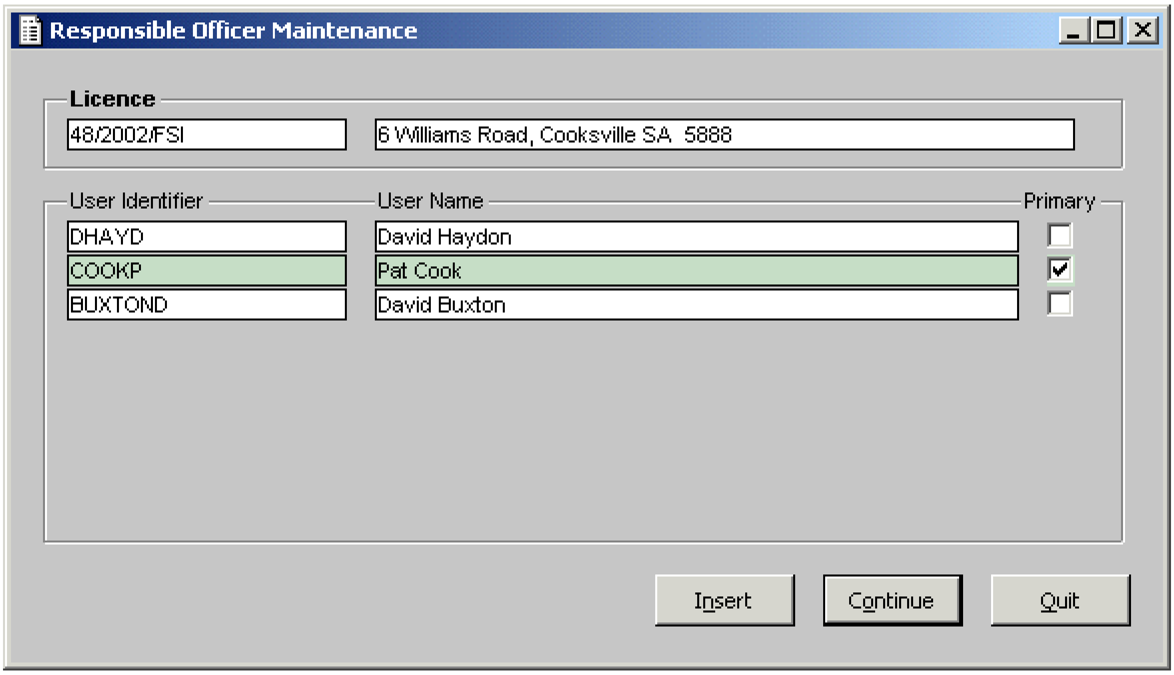
The Dimension field is the actual Code used to calculate the Fee. This field allows the direct keying of the dimension code if known, or select the Pop Up Button to choose from a list of Pre-defined Codes. Once the Dimension is selected, its full description will be placed in the box to the right of it.

Value

The Value field is used to actually key the Value of the Dimensions, whether it be a dollar value, number of storeys to a building, number of car parks etc.

Responsible Officer Maintenance Form

The Responsible Officer Maintenance Form is used to define the Officer(s) that are responsible for the Licence.



Responsible Officer Maintenance Form

Licence
The Licence fields are made up of two sections. The First being the Licence Number selected and the second being the location of the Licence.

User Identifier
The User Identifier field displays the identifier code for the Responsible Officer.

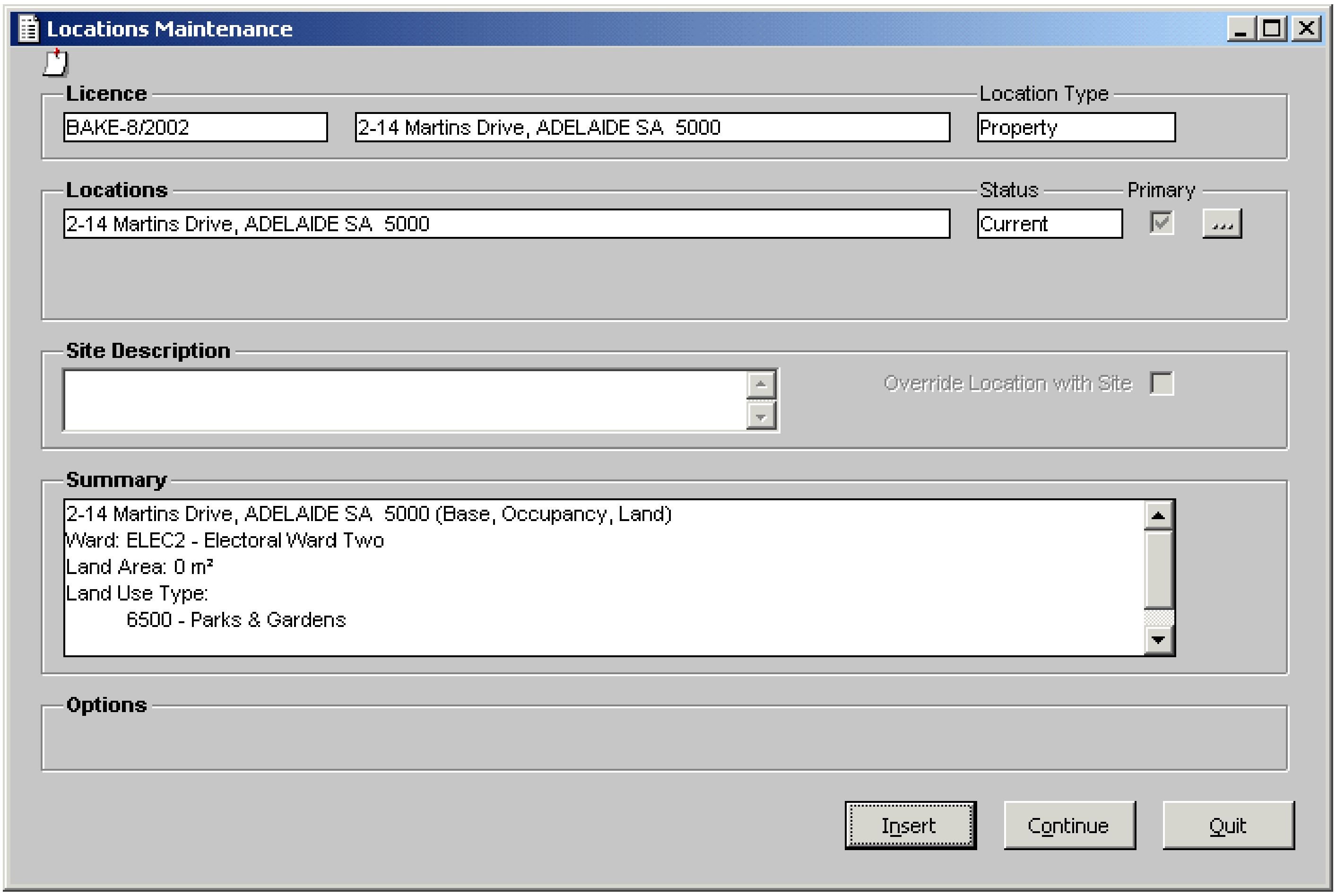
User Name
The User Name field displays the name of the Responsible Officer.

Primary
The Primary Flag is used to identify the Responsible Officer who is the Primary Responsible Officer for the Licence. The first entered Responsible Officer will have this flag set. If the First Officer is not the Primary Officer for the Licence then the User needs to select the correct Officer and update this field for them.

Locations

Locations Maintenance Form

The Locations Maintenance Form details the Licence Number and specific details of the Location.



Locations Maintenance Form

Licence

The Licence Fields are made up of three sections. The First being the actual Licence Number selected, the Second being the primary location of the Licence and the Third being the Type of Location.

Locations

This field details the Locations assigned to the current Licence.

Status

This field details the actual Status of the Location.

Primary

If this box is checked against a Location, this determines that this is the Primary Location for the Licence. Each Licence can have only one Primary Location, but may also have numerous other Locations attached to it.

If the Primary Flag is changed and there are Inspections against the Licence then a message is displayed asking the User if they would like to update the Inspections with the new Primary Location. The message that is displayed is “Inspection records are associated to this location, do you want to update them with the new location - select 'Yes' to update all inspections, 'Incomplete' to update incomplete inspections only and 'No' to cancel."

Answering 'Yes' will result in the Addition of the new location onto the Inspection(s) and the deletion of the old inspection location.

Selecting the 'Incomplete' option will only update location information on Inspections without a Result.

Selecting 'No' will not update Inspection location information on any Inspections.

Note: When location updates occur, not all old Inspection locations are removed. Only the old Primary location is removed from the Inspection(s).

Location Detail Button
The Detail Button allows the User to Detail out on the Location and display the property information within the Property Maintenance function.

Site Description
This field details any description that may be entered against a Location.

Overwrite Location with Site
If this field is checked, then the Location details will be over-written with the Site Description details.

Summary
This field is a Summary of the Location. It details information such as Lots, Parcels, Wards and Conditions.

Refresh Button
This Refresh Button may be used to update the details that are assigned to the Licence with details assigned to the Property. These details include Zones and Land Uses and Consents etc. A warning message will be shown to allow the User the option to change their mind if they do not wish to proceed with the Refresh Option.

Affected Properties

Affected Properties Selection Form

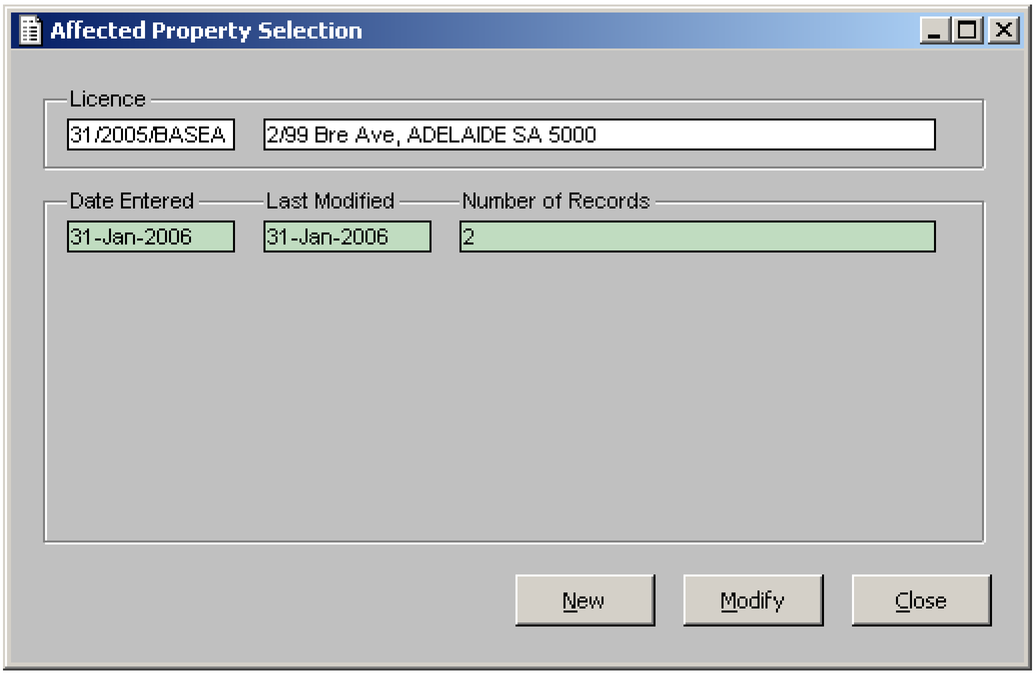
Note: This is an authorised function. This means that the functionality will only be available if you are authorised to use it. If customers do not have this option and require the functionality then it is advisable that they contact their account manager to organise the purchase of this function.

The Affected Property Selection form displays when the Affected Property option is selected. Properties are grouped on this form into sets of Affected Properties for easy identification. Each group has a creation date and a modified date as well as a total number of records in the group.

When the 'New' button is selected a blank Affected Property Maintenance form displays and all records added will be included in a group.

If the 'Modify' button is selected while focus is on one of the groups, then the Affected Property Maintenance form displays a list of all the records previously created in that group. Other properties may be inserted into the group and the Total Number of Records will be updated.

The Allocation/Creation date of an Affected Property is able to be included in the Register Report and a new Extract field (Affected Allocated Date) has been made available within the AFFPROP Extract List to be extracted into documents.



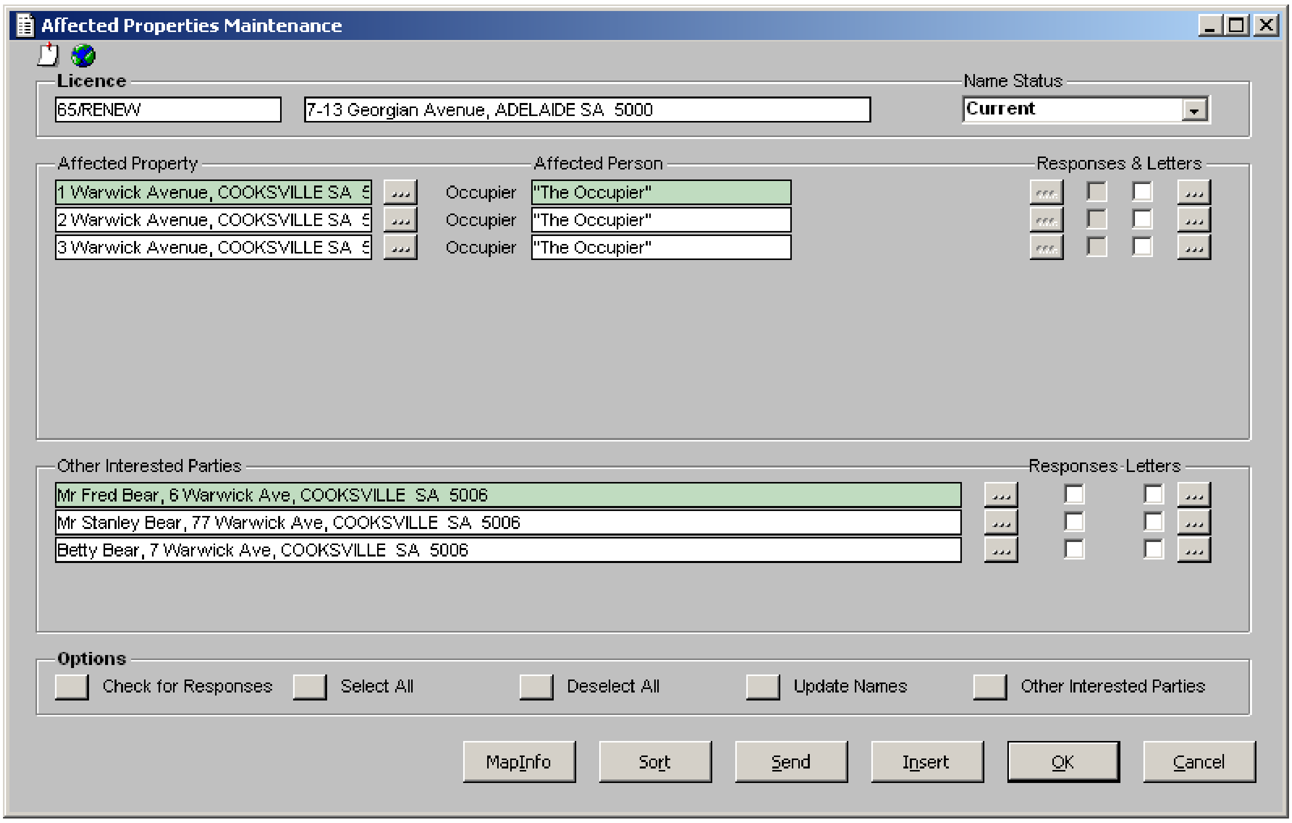
Affected Property Selection form

Affected Property Maintenance Form

The Affected Properties form is designed to allow for the selection of Properties that may be affected by the Licence and the ability to create Letters and receive Responses for these properties.

Note that when this form is displayed via the Enquiry Menu the Name Status field is set to Current & Historic and the User is not able to change this setting. Therefore to enable to User to distinquish the difference between the Historic and Current Names the Current Names are bolded and the Historic Names are not bolded.

NOTE:- “The Occupier” records are only created where required. If the Property has a Vacant Land primary land use and the Exclude Vacant Land parameter has been checked on then no “The Occupier” records will be created. Similarly if the Property Type on the selected property is one that has been noted as one to be Excluded then no ‘The Occupier” record will be created.



Affected Properties Maintenance Form

Licence

These fields detail the current Licence and details of its Location.

Name Status

The Name Status field defaults to Current upon entry into the Affected Properties Maintenance Form. The Dropdown can be changed to show only Historic or a combination of Current and Historic Names.

Note that when this form is displayed via the Enquiry Menu the Name Status field is set to Current & Historic and the User is not able to change this setting. Therefore to enable to User to distinquish the difference between the Historic and Current Names the Current Names are bolded and the Historic Names are not bolded.

Affected Property

This field details the actual Property Affected by this Licence. Multiple Properties can be selected by using the insert button. Clicking the Detail button to the right of the Affected Property will detail out to the Property Summary Form.

Affected Person - Name

This field details the name of the Affected Person associated with the Affected Property. The detail button to the right of this field allows the User to detail to the name and address information for the People.

Affected Person – Mailing Address

To determine whether the Owner/Occupier lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Owner/Occupier's Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address will be displayed to enable the user to determin whether they are truly the same address or different.

If the Owner/Occupier's Mailing Address does not match the Affected Property Address, then the Affected Person's Mailing Address is not displayed in this field.

Responses
This field if checked will show that Responses have been received regarding this Licence. Responses may be added by detailing out to the Letter Summary and adding the particular Response.

Letter Sent
This field if check will show that a Letter has been sent to this particular Affected Property. The detail button to the right of the field allows the User to detail out to the particular Letter Request sent. The User may then add a Response, view the Letter, or re-generate a Letter.

Other Interested Parties
This field details the name and address of Other Interested Parties associated with the Affected Property. The detail button to the right of this form allows the User to detail to the list of Other Interested Parties.

Responses
This field if checked will show that Responses have been received regarding this Licence. Responses may be added by detailing out to the Letter Summary and adding the particular Response.

Letter Sent
This field if check will show that a Letter has been sent to this particular Interested Party. The detail button to the right of the field allows the User to detail out to the particular Letter Request sent. The User may then add a Response, view the Letter, or re-generate a Letter.

Check for Responses
When selecting the Check for Responses Button will place a check tick in the Responses box against those letters that have received any responses.

Select All
Selecting this button will select all the Affected Properties and Affected Person. However, the Other Interested Parties need to be manually selected.

Deselect All
Selecting this button will deselect all the Affected Properties and Affected Person. However, the Other Interested Parties need to be manually deselected.

Update Names
The Update Names Button when selected will update the Property Owner Name information for Affected Properties. If the Property Owner had changed then the new Owner will be added as an Affected Person and the old Owner will be made Historic. Any letters that have been created against the old Owner are still retained and able to be reviewed by changing the Name Status to Historic and selecting the Letters detail button.

Other Interested Parties
Selecting the 'Other Interested Parties' option button enables the User to link Other Interested Parties to the Application.

Note this Option Button only appears when a Default Person Type has been defined within the Affected Properties Parameters within the System Parameters for the Application Class.

Sort Button
The Sort Button may be selected to "Sort" Affected People by Property order or Person order.

Affected Property Selection Form

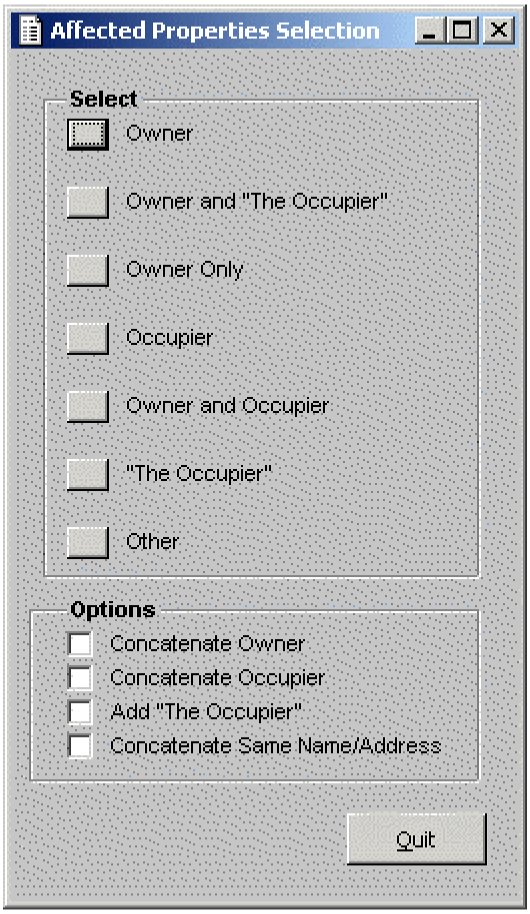
The Affected Property Selection Form consists of a series of buttons, to select the particular Affected Person associated with that Property. This form is displayed when the Insert Button has been selected from the Affected Properties Maintenance Form.

If Affected Properties Default Parameters have been defined within the Licence Parameters then the values from the parameter will be defaulted into this form.

Note that if a Default Person Type has been defined within the Affected Properties Parameters then this form will not display and the Default Person Type will be selected aznd the User will be prompted to search form the affected property.

Refer to the text below this Form for screen capture examples of the various combinations available.

The selections available are:-



Affected Properties Selection Form

EXAMPLE

The selected properties have the following names and roles assigned to them.

1 WILLIAMS ROAD

OWNER	WALLACE GROMIT	156 MOONLIGHT BAY

2 WILLIAMS ROAD

OWNER	G TURNER	2 WILLIAMS ROAD
OWNER	J TURNER	2 WILLIAMS ROAD
OWNER	JOYFUL TOY COMP	2 WILLIAMS ROAD

<u>3 WILLIAMS ROAD</u>

OWNER	P TREBILCOCK	3, 26 SAMUAL ROAD
OCCUPIER	P TREBILCOCK	3, 26 SAMUAL ROAD
OCCUPIER	V C GABB	248/49 BUXTON ST, NTH ADELAIDE
OCCUPIER	T J TREBILCOCK	45 VICTORIA SQ ARC, ADELAIDE
OCCUPIER	W J TREBILCOCK	45 VICTORIA SQ ARC, ADELAIDE

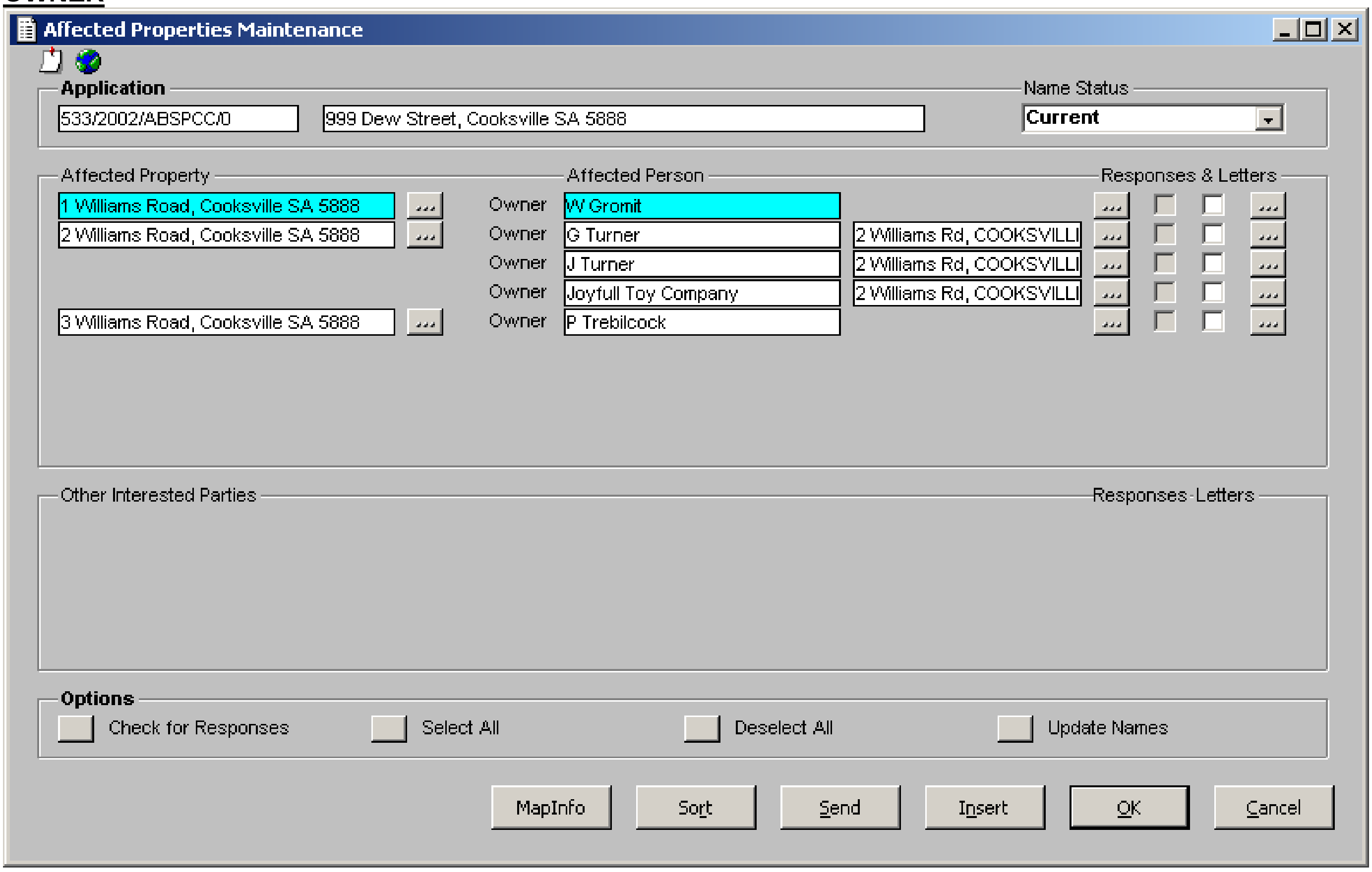
<u>23 WILLIAMS ROAD</u>

OCCUPIER	J YELTEN	8 WILLIAMS ROAD

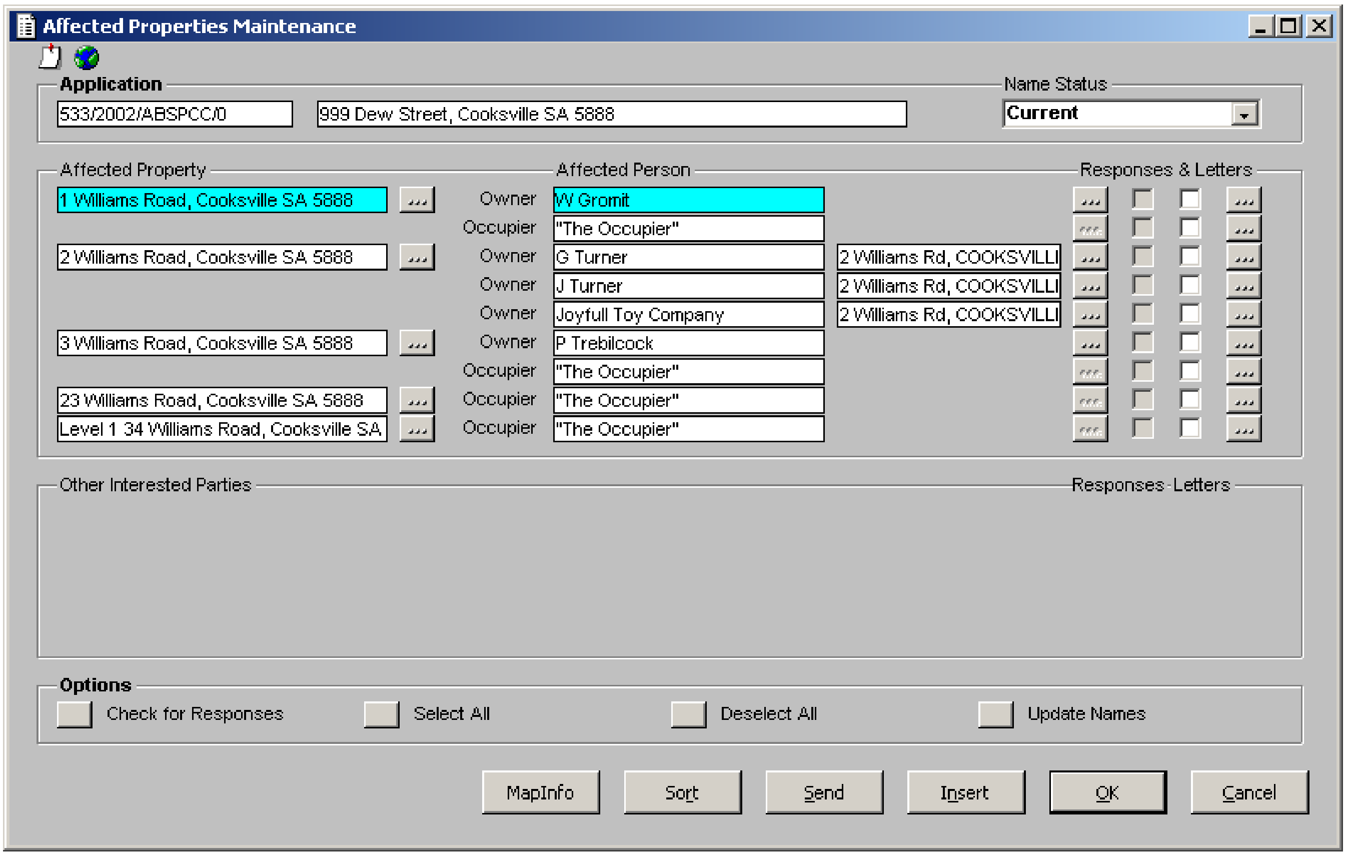
<u>1/34 WILLIAMS ROAD</u>

NO OWNERS OR OCCUPIERS

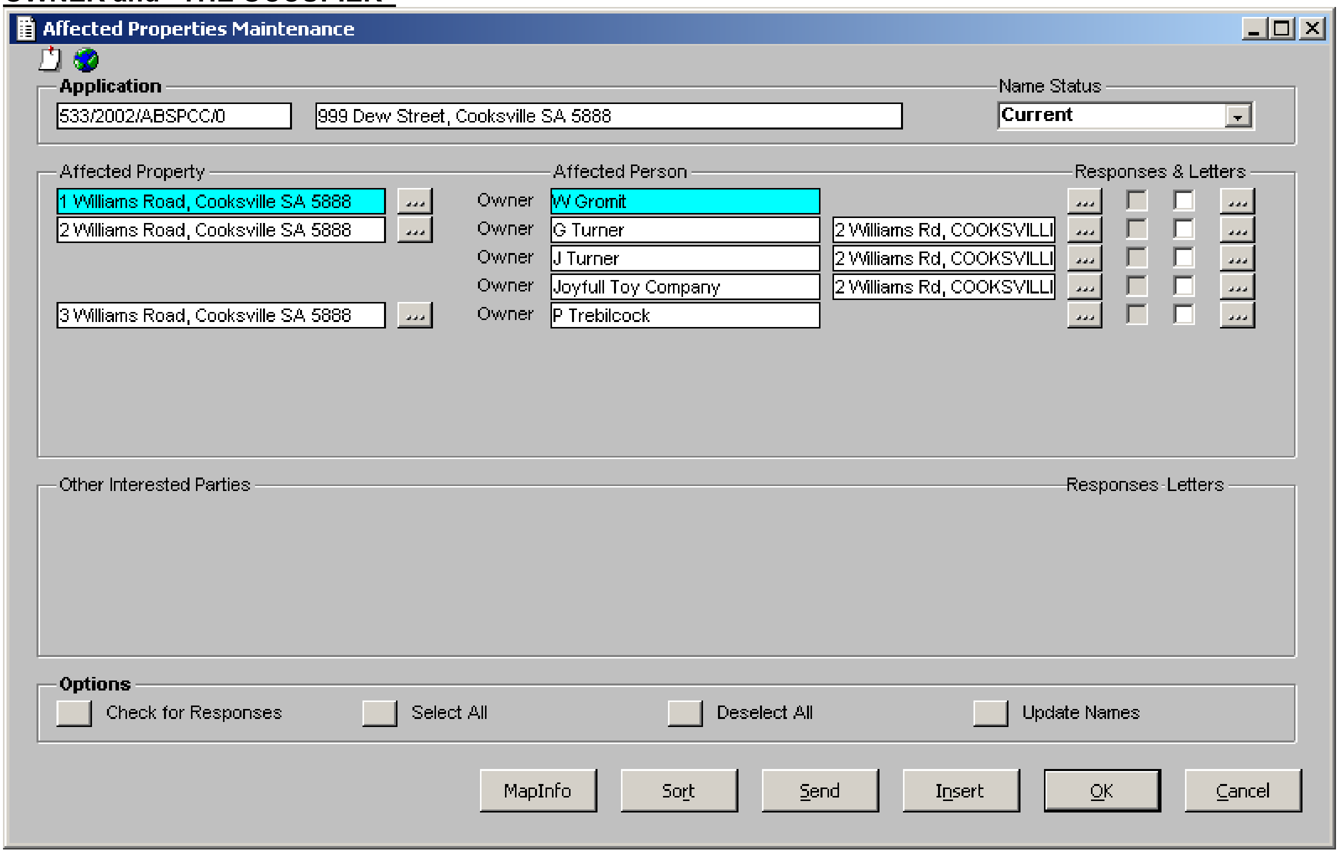
<u>OWNER</u>



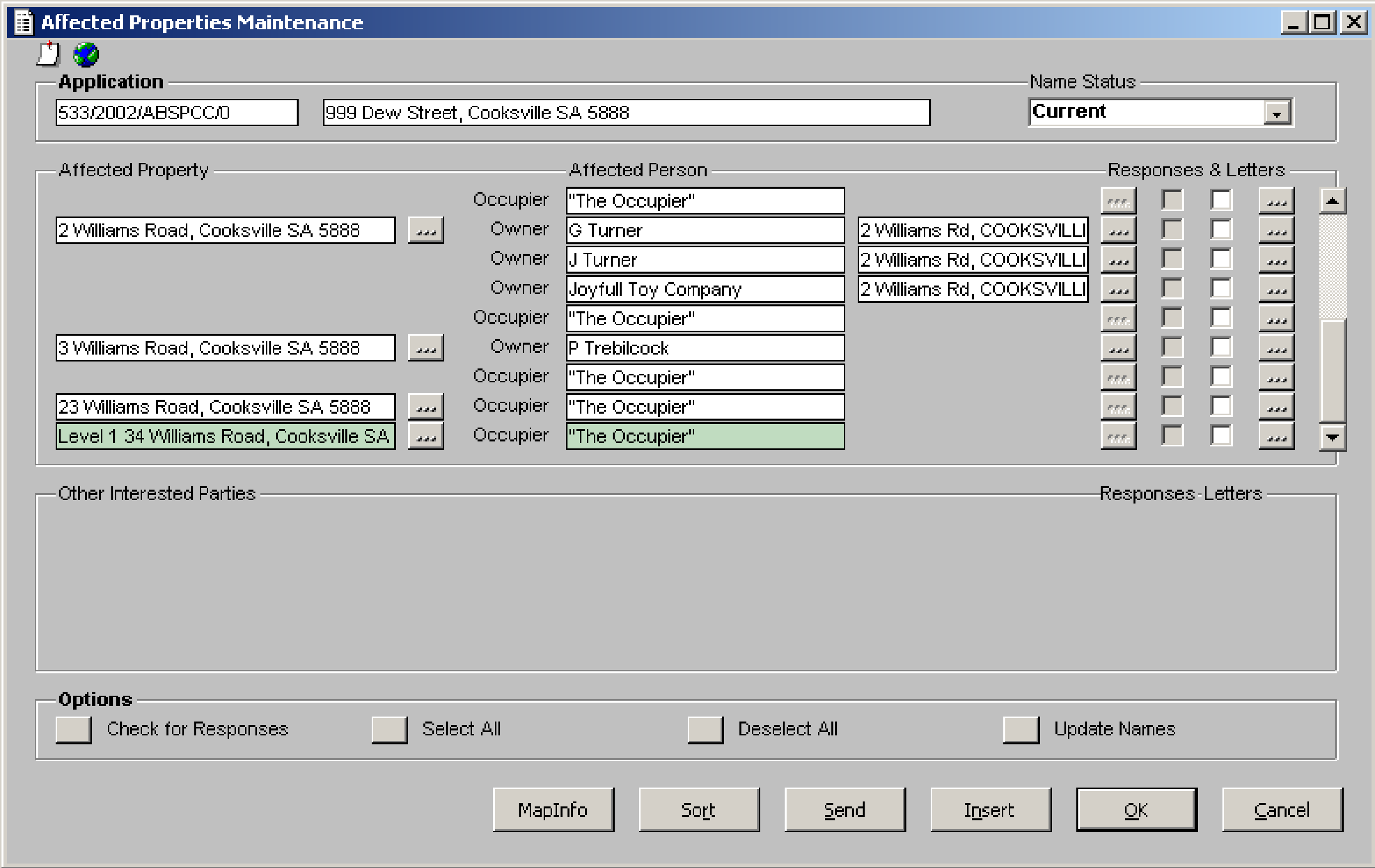
<u>OWNER - ADD "THE OCCUPIER"</u>



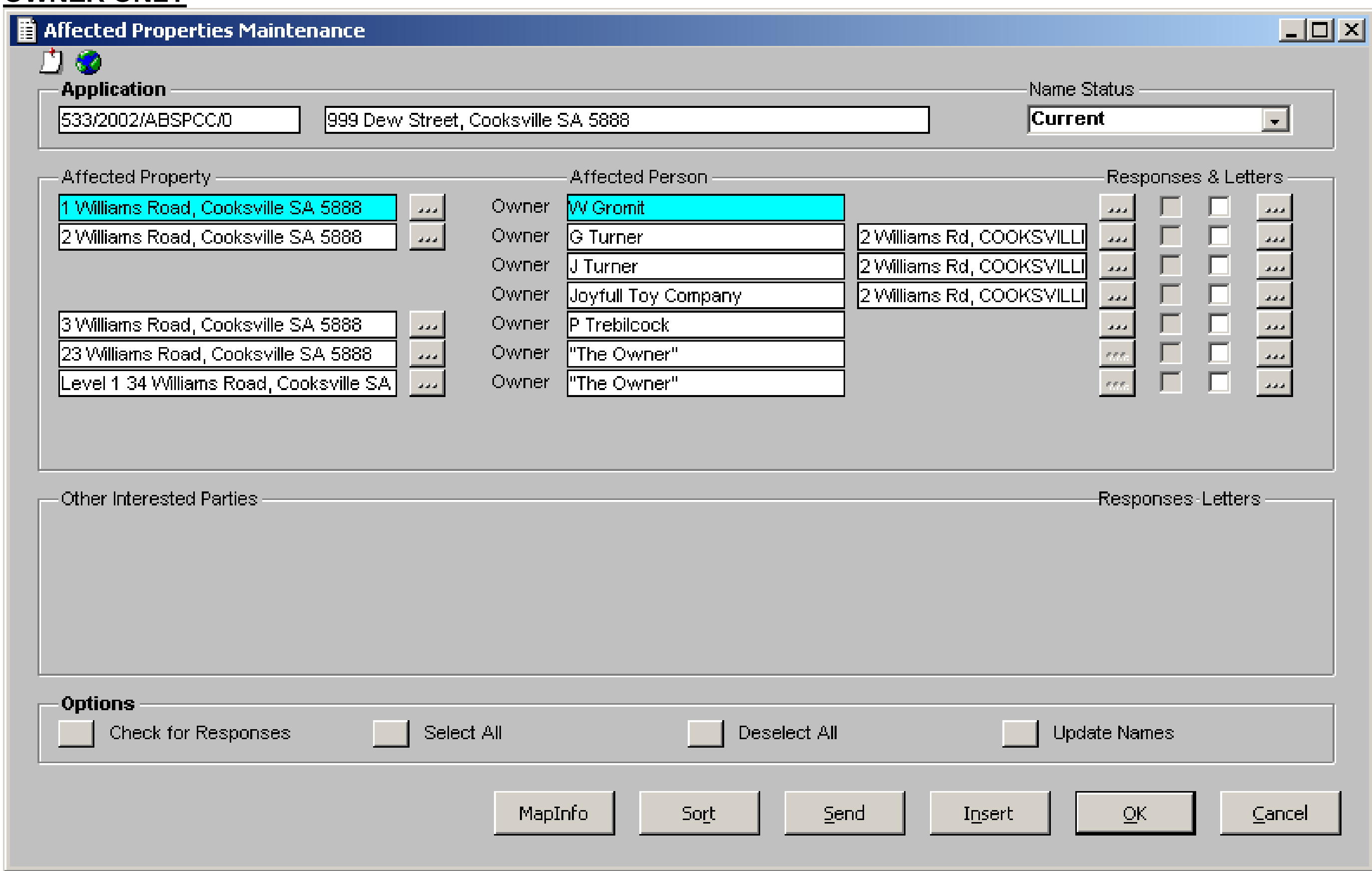
<u>OWNER and "THE OCCUPIER"</u>



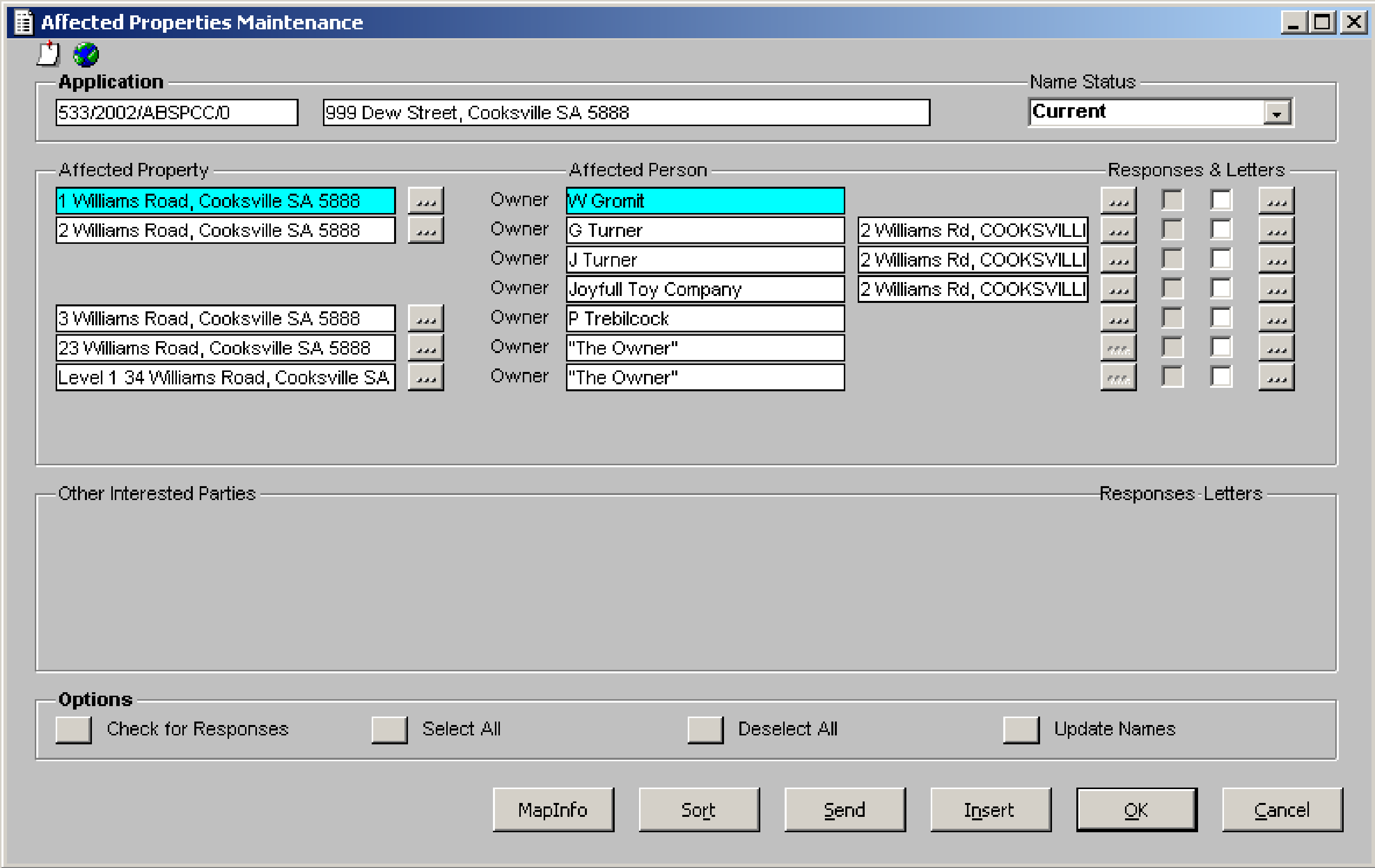
<u>OWNER and "THE OCCUPIER" – ADD "THE OCCUPIER"</u>



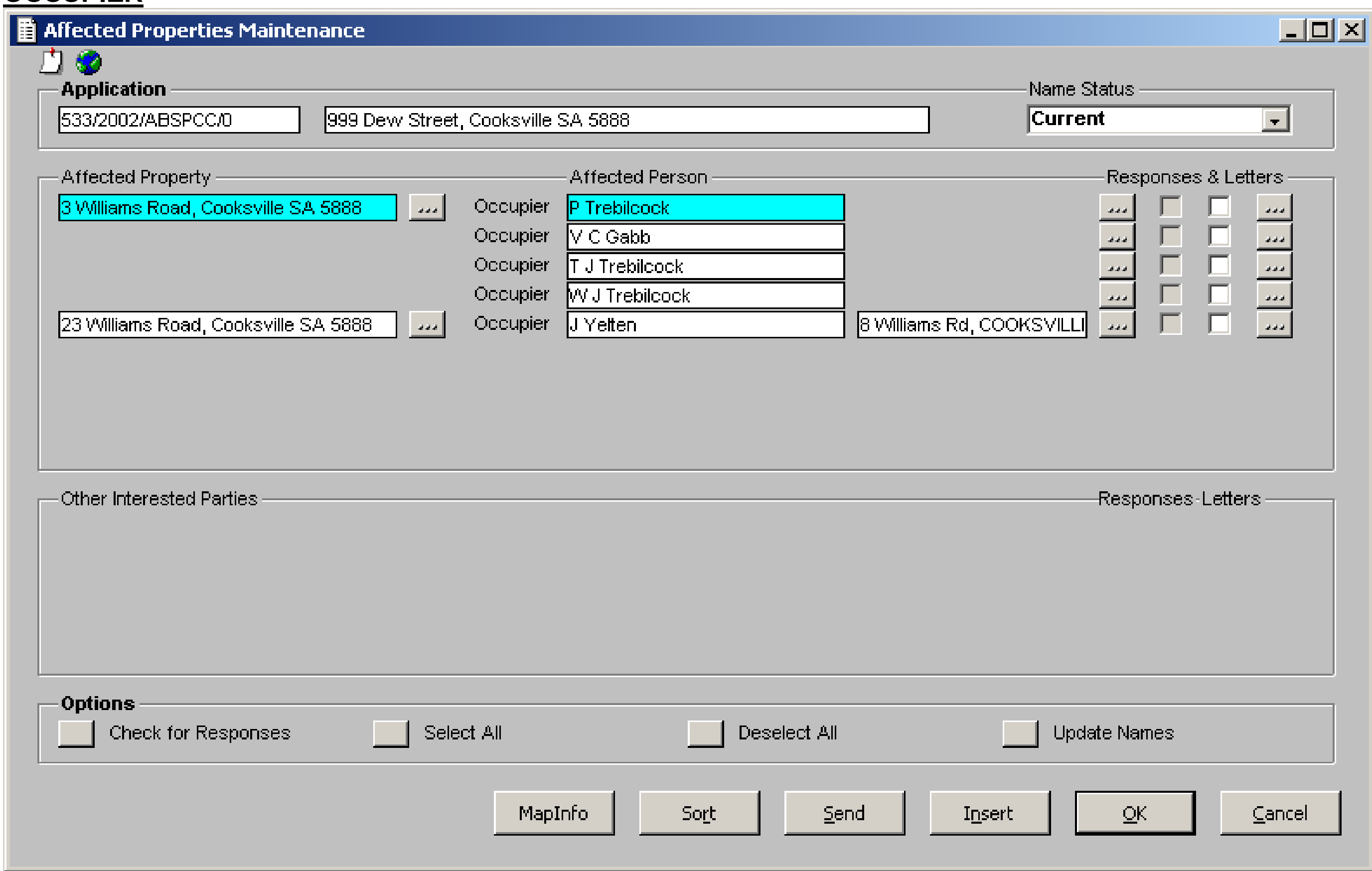
OWNER ONLY



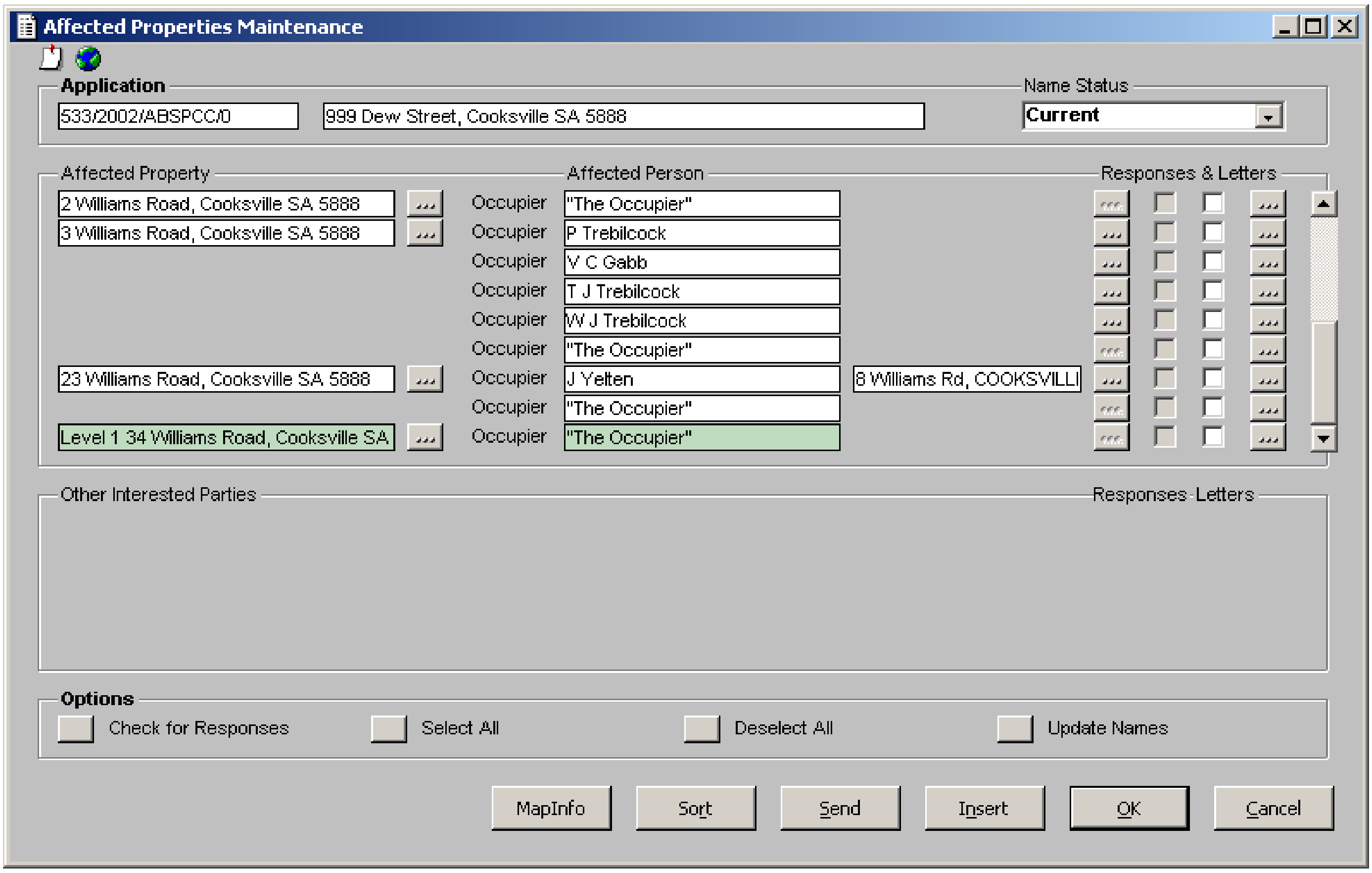
OWNER ONLY – ADD "THE OCCUPIER"



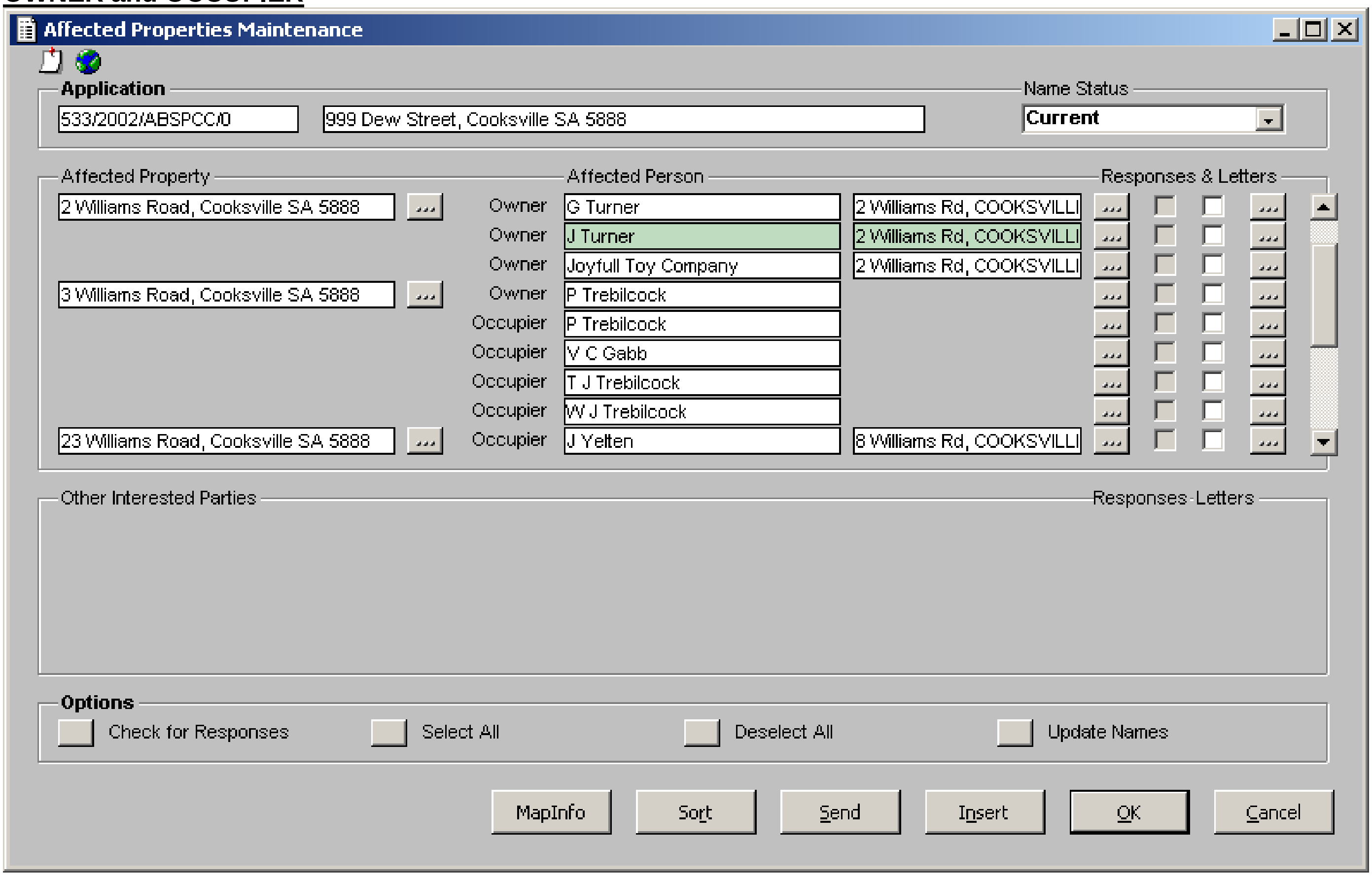
OCCUPIER



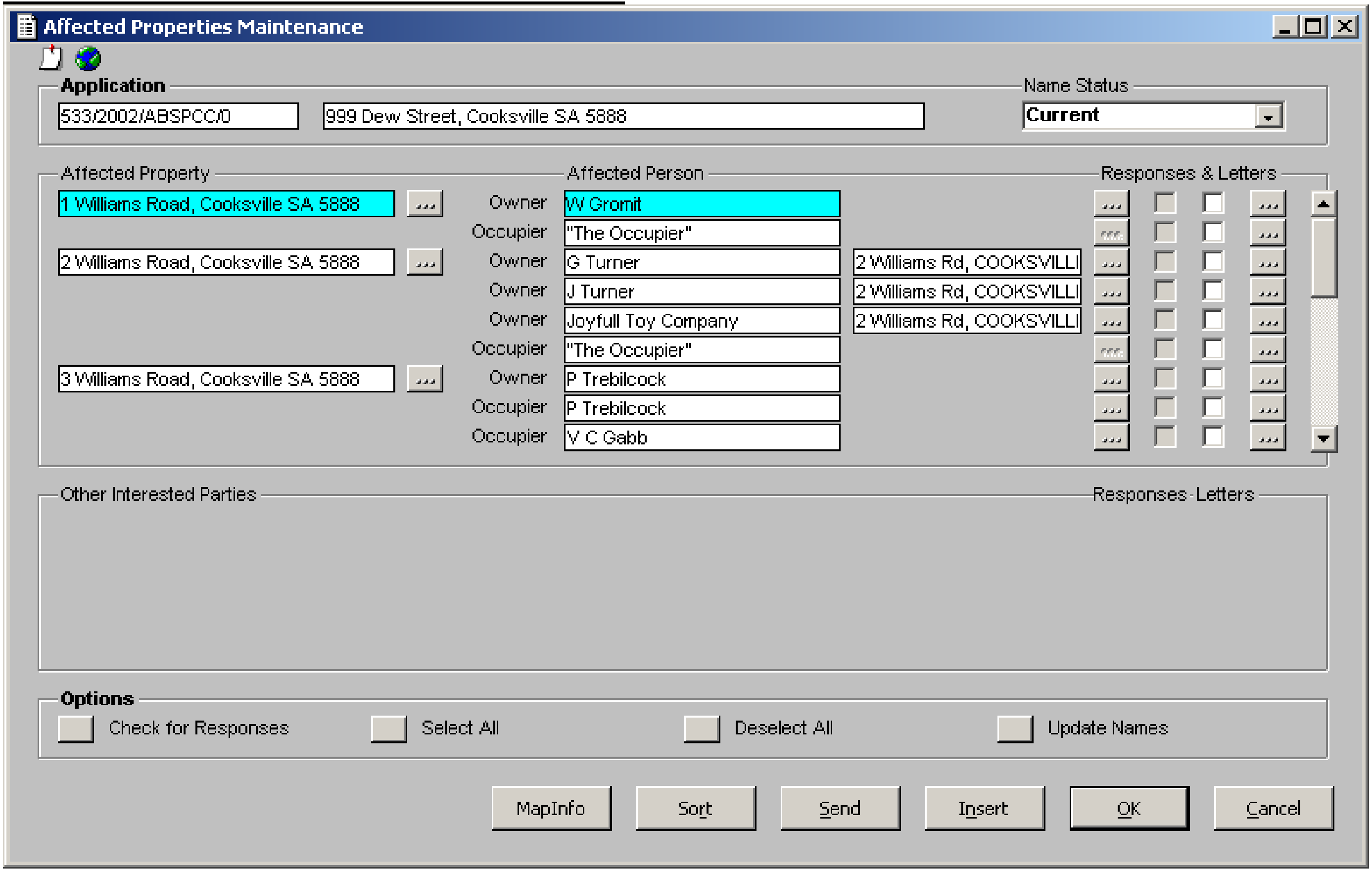
OCCUPIER – ADD "THE OCCUPIER"

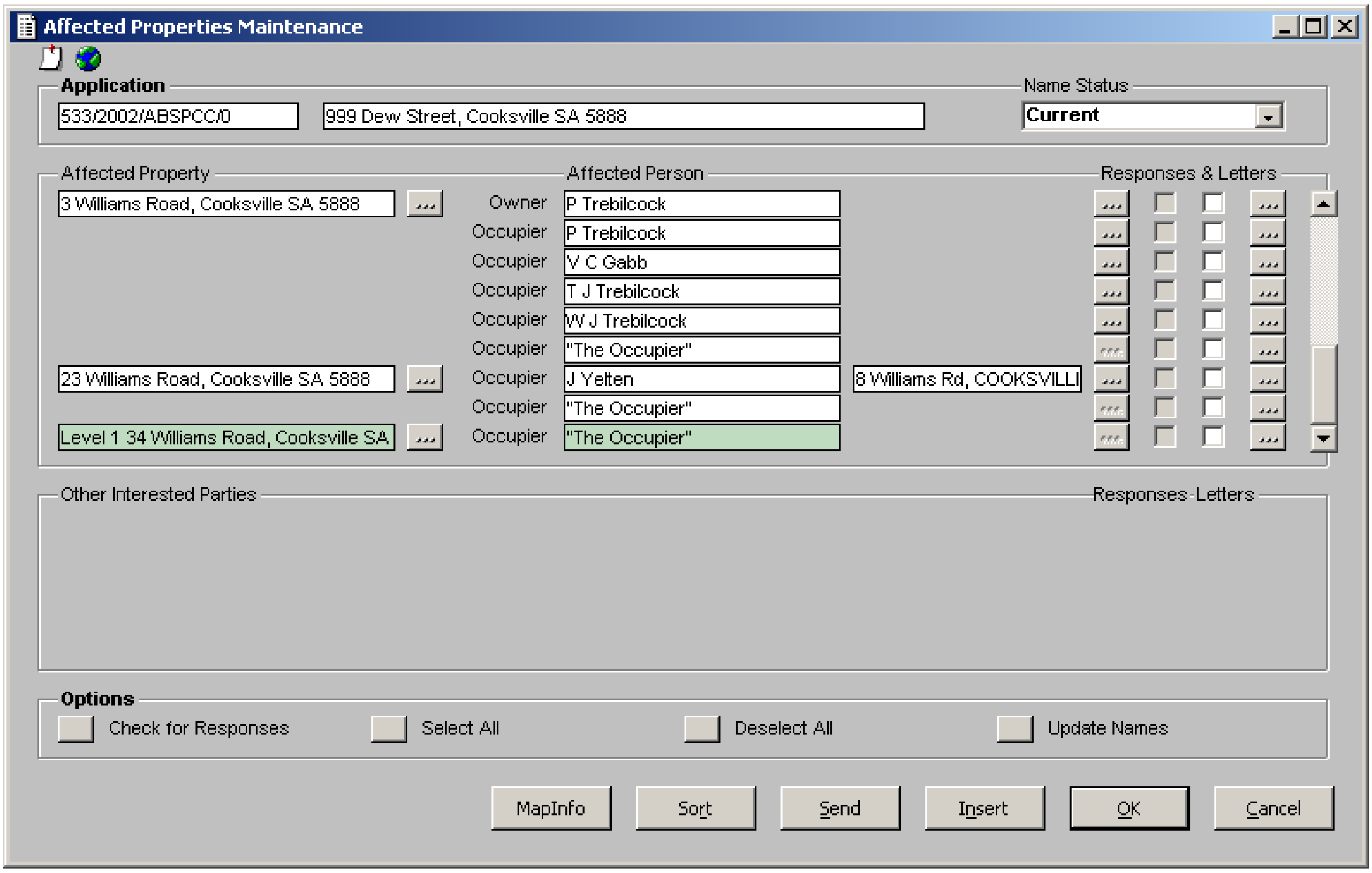


OWNER and OCCUPIER

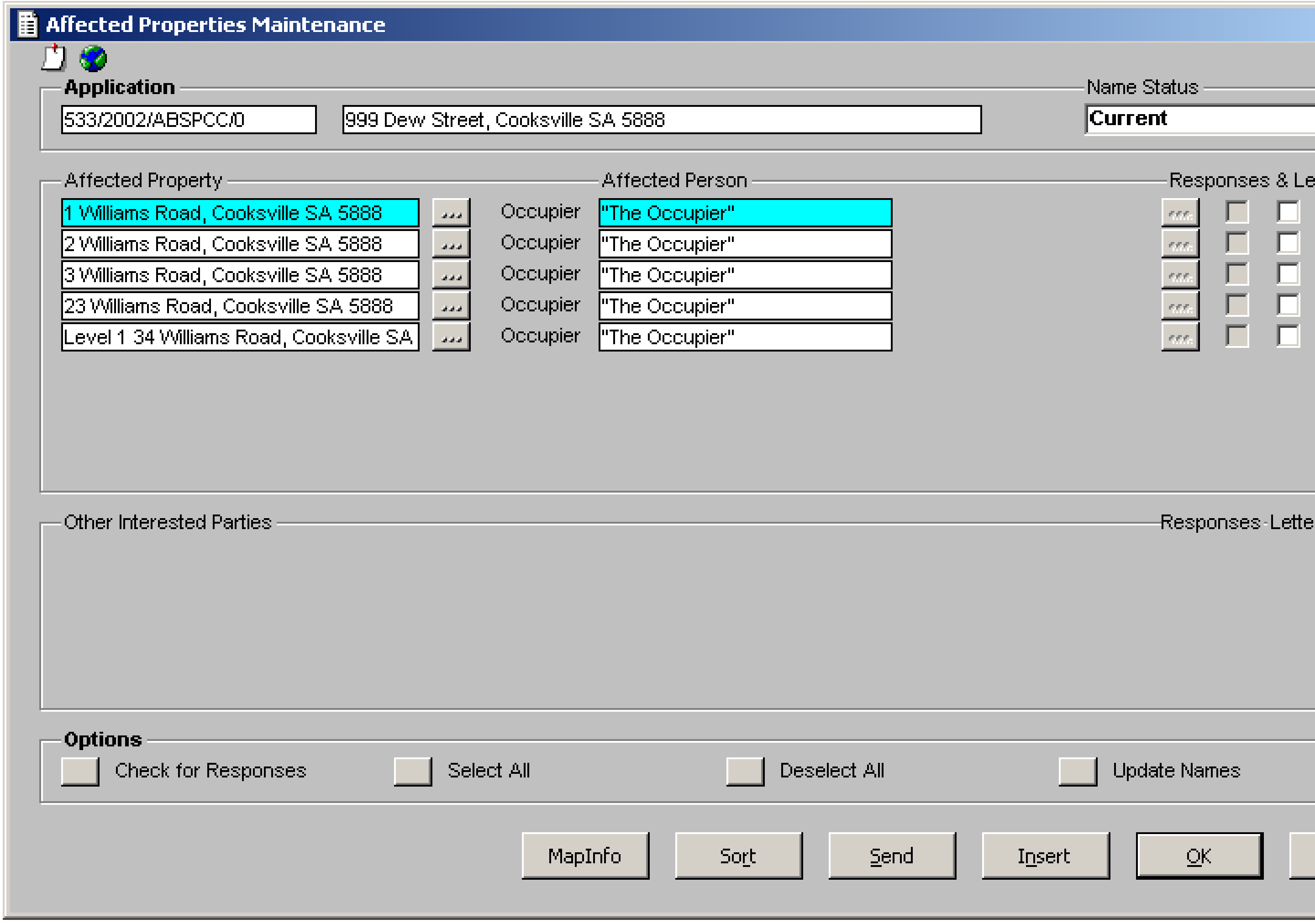


OWNER and OCCUPIER – ADD "THE OCCUPIER"

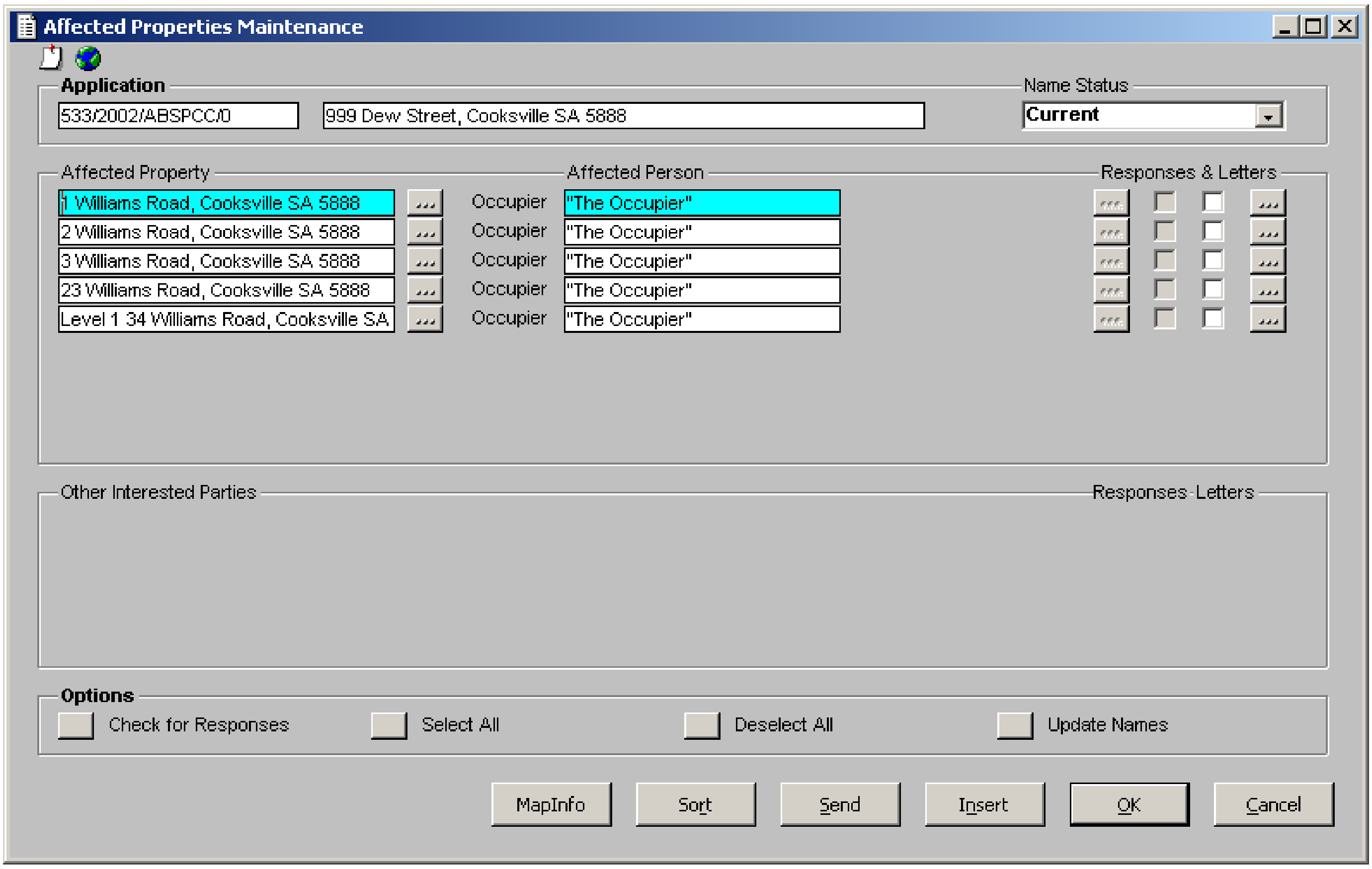




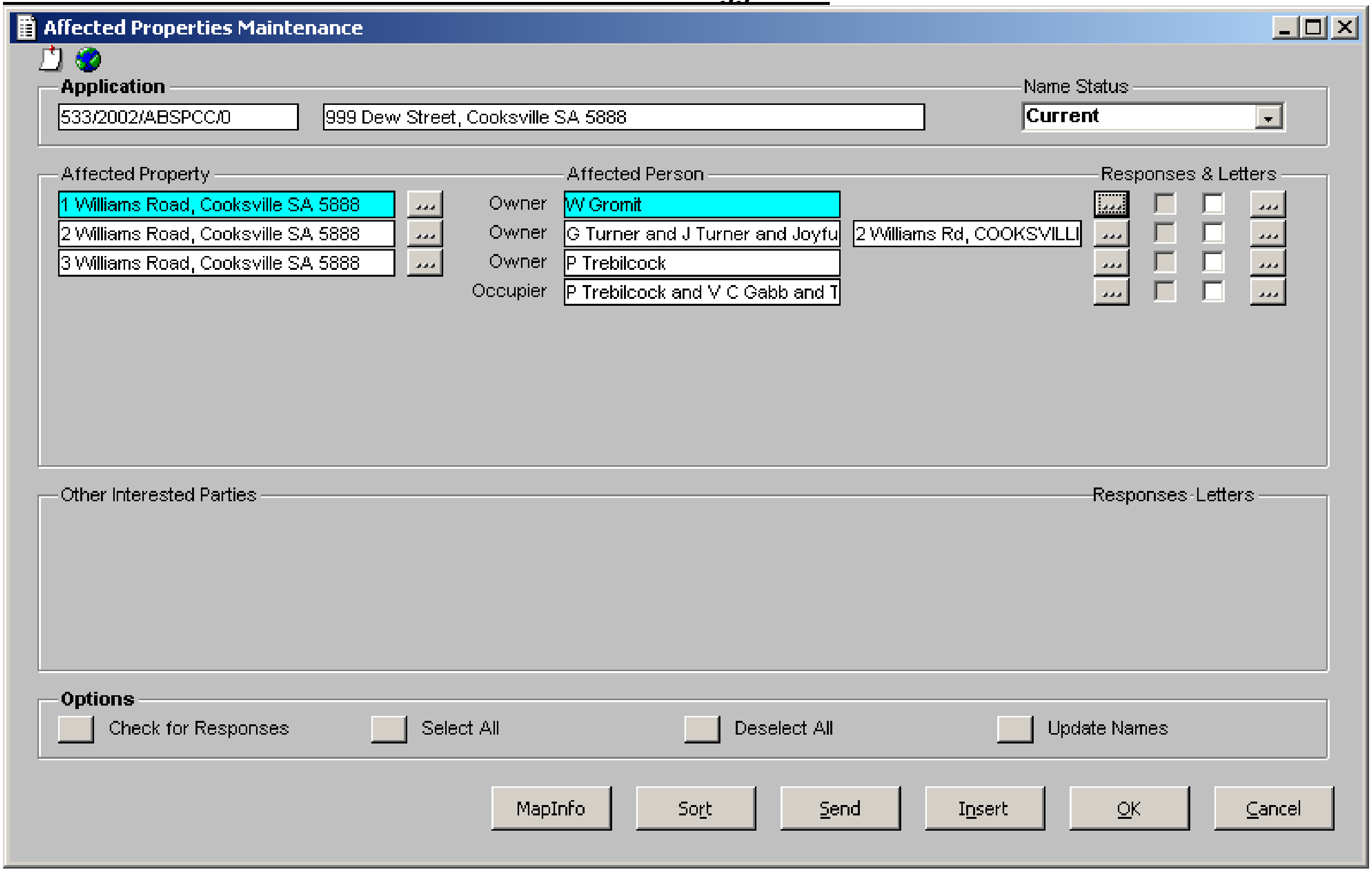
"THE OCCUPIER"



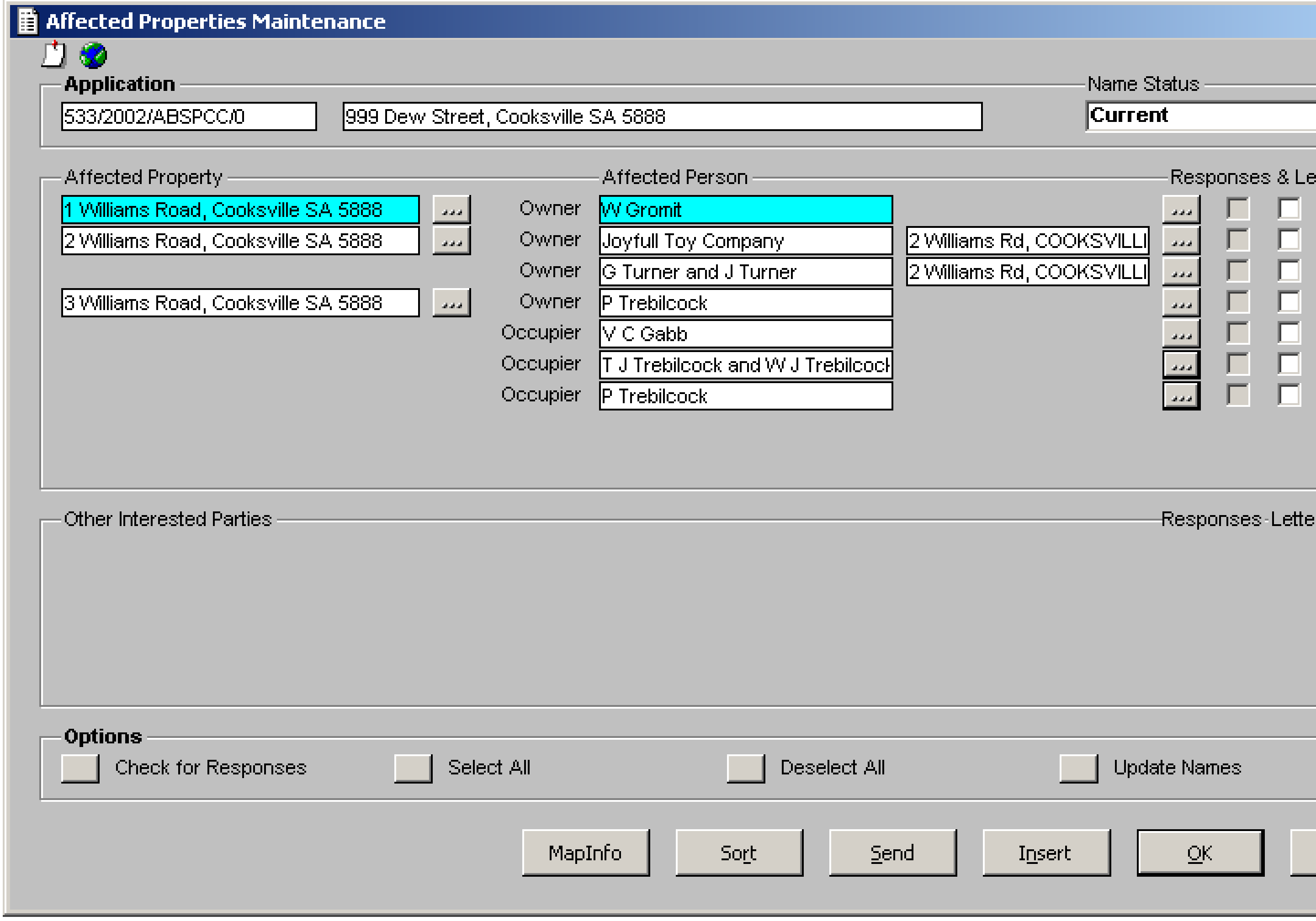
<u>"THE OCCUPIER" – ADD "THE OCCUPIER"</u>



OWNER and OCCUPIER with
CONCATENATE OWNER / CONCATENATE OCCUPIER flagged ON



OWNER and OCCUPIER with
CONCATENATE SAME NAME/ADDRESS flagged ON



Owner

Owner – No Options

Selecting the 'Owner' Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows the Owner of the Property to be selected as the Affected Person. **No** occurrence of 'The Occupier' will be included in the selection process.

To determine whether the Owner lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Owner's Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address will be displayed to enable the user to determine whether they are truly the same address or different and whether an occurrence of 'The Occupier' will be required.

If the Owner's Mailing Address does **NOT** match the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address is NOT displayed.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.

If the above properties were selected as Affected Properties using the 'Owner' option only they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Owner**	**Martin Smith**	**13 Smith St, Geac**
14 Smith St, Geac	**Owner**	**William Bird**	
17 Smith St, Geac	**Owner**	**Robyn White**	**6/129 Smith St, Geac**

Owner – Add "The Occupier"

Selecting the 'Owner' Button with the Add "The Occupier" Option performs the selection of the Affected Properties in the following way.

Selecting these buttons allows the Owner of the Property to be selected as the Affected Person. Occurrences of 'The Occupier' will be included in the selection process. Where the Owner's Mailing Address does **NOT** match the Affected Property Address an occurrence of "The Occupier" will be included for the Affect Property selected.

To determine whether the Owner lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Owner's Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address will be displayed to enable the user to determine whether they are truly the same address or different and whether an occurrence of 'The Occupier' will be required.

If the Owner's Mailing Address does **NOT** match the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address is NOT displayed.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.

If the above properties were selected as Affected Properties using the 'Owner' and the Add "The Occupier" Option they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Owner**	**Martin Smith**	**13 Smith St, Geac**
14 Smith St, Geac	**Owner**	**William Bird**	
	Occupier	**"The Occupier"**	
17 Smith St, Geac	**Owner**	**Robyn White**	**6/129 Smith St, Geac**

Owner and "The Occupier"

Owner and "The Occupier" – No Options

Selecting the 'Owner and "The Occupier"' Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows the Owner of the Property to be selected as the Affected Person. **No** occurrence of 'The Occupier' will be included in the selection process.

To determine whether the Owner lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Owner's Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address will be displayed to enable the user to determine whether they are truly the same address or different and whether an occurrence of 'The Occupier' will be required.

If the Owner's Mailing Address does **NOT** match the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address is NOT displayed.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac

If the above properties were selected as Affected Properties using the 'Owner and "The Occupier" Option only they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Owner**	**Martin Smith**	**13 Smith St, Geac**
14 Smith St, Geac	**Owner**	**William Bird**	
17 Smith St, Geac	**Owner**	**Robyn White**	**6/129 Smith St, Geac**

Owner and "The Occupier" – Add "The Occupier"

Selecting the 'Owner and "The Occupier"' Button with the Add "The Occupier" Option performs the selection of the Affected Properties in the following way.

Selecting these buttons allows the Owner of the Property to be selected as the Affected Person. Occurrences of 'The Occupier' will be included in the selection process. "The Occupier" will be included for **ALL** Affected Properties selected.

To determine whether the Owner lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Owner's Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address will be displayed to enable the user to determine whether they are truly the same address or different and whether an occurrence of 'The Occupier' will be required.

If the Owner's Mailing Address does **NOT** match the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address is NOT displayed.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac

If the above properties were selected as Affected Properties using the 'Owner and "The Occupier"' and the Add "The Occupier" Option they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Owner**	**Martin Smith**	**13 Smith St, Geac**
	Occupier	**"The Occupier"**	
14 Smith St, Geac	**Owner**	**William Bird**	
	Occupier	**"The Occupier"**	
17 Smith St, Geac	**Owner**	**Robyn White**	**6/129 Smith St, Geac**
	Occupier	**"The Occupier"**	
19 Smith St, Geac	**Occupier**	**"The Occupier"**	

Owner Only

Owner Only – No Options

Selecting the 'Owner Only' Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows the Owner of the Property to be selected as the Affected Person. **No** occurrence of 'The Occupier' will be included in the selection process. Where the Affected Property that has been selected does not have an Owner record an occurrence of "The Owner" will be generated for the Affected Property.

To determine whether the Owner lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Owner's Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address will be displayed to enable the user to determine whether they are truly the same address or different and whether an occurrence of 'The Occupier' will be required.

If the Owner's Mailing Address does **NOT** match the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address is NOT displayed.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac

If the above properties were selected as Affected Properties using the 'Owner Only' option only they would appear as follows on the Affected Properties Maintenance form

Affected Property		Name	Mailing Address
13 Smith St, Geac	**Owner**	**Martin Smith**	**13 Smith St, Geac**
14 Smith St, Geac	**Owner**	**William Bird**	
17 Smith St, Geac	**Owner**	**Robyn White**	**6/129 Smith St, Geac**
19 Smith St, Geac	**Owner**	**"The Owner"**	

Owner Only – Add "The Occupier"

Selecting the 'Owner Only' Button with the Add "The Occupier" Option performs the selection of the Affected Properties as the option above where the Add "The Occupier" Option was not selected.

Selecting these buttons allows the Owner of the Property to be selected as the Affected Person. **No** occurrences of 'The Occupier' will be included in the selection process.

To determine whether the Owner lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Owner's Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address will be displayed to enable the user to determine whether they are truly the same address or different and whether an occurrence of 'The Occupier' will be required.

If the Owner's Mailing Address does **NOT** match the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address is NOT displayed.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood.

- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac

If the above properties were selected as Affected Properties using the 'Owner Only' and the Add "The Occupier" Option they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Owner**	**Martin Smith**	**13 Smith St, Geac**
14 Smith St, Geac	**Owner**	**William Bird**	
17 Smith St, Geac	**Owner**	**Robyn White**	**6/129 Smith St, Geac**
19 Smith St, Geac	**Owner**	**"The Owner"**	

Occupier

Occupier – No Options

Selecting the 'Occupier' Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows the Occupier of the Property to be selected as the Affected Person. **No** occurrence of 'The Occupier' will be included in the selection process. Where the Affected Property that has been selected does not have an Occupier record an occurrence of "The Occupier" is NOT generated for the Affected Property.

To determine whether the Occupier lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Occupier's Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address will be displayed to enable the user to determine whether they are truly the same address or different and whether an occurrence of 'The Occupier' will be required.

If the Occupier's Mailing Address does **NOT** match the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address is NOT displayed.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac and Tom's Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the 'Occupier' Option only they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Occupier**	**Martin Smith**	**13 Smith St, Geac**
17 Smith St, Geac	**Occupier**	**Greg Wood**	
19 Smith St, Geac	**Occupier**	**Tom Herd**	**19 Smith St, Geac**

Occupier – Add "The Occupier"

Selecting the 'Owner' Button with the Add "The Occupier" Option performs the selection of the Affected Properties in the following way.

Selecting these buttons allows the Occupier of the Property to be selected as the Affected Person. Occurrences of ‘The Occupier’ will be included on all Properties that have been included in selection process whether or not there is an Occupier Role record already on the Property.

To determine whether the Occupier lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Occupier’s Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person’s Mailing Address will be displayed to enable the user to determine whether they are truly the same address or different and whether an occurrence of ‘The Occupier’ will be required.

If the Occupier’s Mailing Address does **NOT** match the Affected Property Address, matching on Street and Suburb only, then the Affected Person’s Mailing Address is NOT displayed.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac and Tom’s Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the ‘Occupier’ and the Add “The Occupier” Option they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Occupier**	**Martin Smith**	**13 Smith St, Geac**
	Occupier	**“The Occupier”**	
14 Smith St, Geac	**Occupier**	**“The Occupier”**	
17 Smith St, Geac	**Occupier**	**Greg Wood**	
	Occupier	**“The Occupier”**	
19 Smith St, Geac	**Occupier**	**Tom Herd**	**19 Smith St, Geac**
	Occupier	**“The Occupier”**	

Owner and Occupier

Owner and Occupier – No Options

Selecting the ‘Owner and Occupier’ Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows the Owner and or Occupier of the Property to be selected as the Affected Person. No occurrence of ‘The Occupier’ will be included in the selection process. Where the Affected Property that has been selected does not have an Owner or an Occupier record the Property will not be included in the selected Affected Properties.

To determine whether the Owner/Occupier lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Owner/Occupier’s Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person’s Mailing Address will be displayed to enable the user to determine whether they are truly the same address or different.

If the Owner/Occupier’s Mailing Address does **NOT** match the Affected Property Address, matching on Street and Suburb only, then the Affected Person’s Mailing Address is NOT displayed.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac and Tom's Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the 'Owner and Occupier' option only they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Owner**	**Martin Smith**	**13 Smith St, Geac**
	Occupier	**Martin Smith**	**13 Smith St, Geac**
14 Smith St, Geac	**Owner**	**William Bird**	
17 Smith St, Geac	**Owner**	**Robyn White**	
	Occupier	**Greg Wood**	
19 Smith St, Geac	**Occupier**	**Tom Herd**	**19 Smith St, Geac**

Owner and Occupier – Add "The Occupier"

Selecting the 'Owner and Occupier' Button with the Add "The Occupier" Option performs the selection of the Affected Properties in the following way.

Selecting these buttons allows the Owner and or the Occupier of the Property to be selected as the Affected Person. Occurrences of 'The Occupier' will be included in the selection process for each Affected Property that has been selected.

To determine whether the Owner/Occupier lives at the Affected Property matching of the Street and Suburb of the Mailing Address with the Property Address is done. The Identifier section of the address is not included in the matching process.

If the Owner/Occupier's Mailing Address matches the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address will be displayed to enable the user to determine whether they are truly the same address or different and whether an occurrence of "The Occupier' will be required.

If the Owner/Occupier's Mailing Address does **NOT** match the Affected Property Address, matching on Street and Suburb only, then the Affected Person's Mailing Address is NOT displayed.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac and Tom's Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the 'Owner and Occupier' and the Add "The Occupier" Option they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Owner**	**Martin Smith**	**13 Smith St, Geac**
	Occupier	**Martin Smith**	**13 Smith St, Geac**

	Occupier	**“The Occupier”**	
14 Smith St, Geac	**Owner**	**William Bird**	
	Occupier	**“The Occupier”**	
17 Smith St, Geac	**Owner**	**Robyn White**	
	Occupier	**Greg Wood**	
	Occupier	**“The Occupier”**	
19 Smith St, Geac	**Occupier**	**Tom Herd**	**19 Smith St, Geac**
	Occupier	**“The Occupier”**	

“The Occupier”

<u>“The Occupier” – No Options</u>

Selecting the ‘The Occupier’ Button without any of the Options available will perform the selection of the Affected Properties in the following way.

Selecting this button allows an occurrence of “The Occupier” to be included against the Affected Properties that have been selected. Where the Affected Property that has been selected may have Occupier Role records associated to it these Occupier Role records are not included in the selection.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac and Tom’s Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the “The Occupier” option only they would appear as follows on the Affected Properties Maintenance form.

<u>Affected Property</u>		**<u>Name</u>**	**<u>Mailing Address</u>**
13 Smith St, Geac	**Occupier**	**“The Occupier”**	
14 Smith St, Geac	**Occupier**	**“The Occupier”**	
17 Smith St, Geac	**Occupier**	**“The Occupier”**	
19 Smith St, Geac	**Occupier**	**“The Occupier**	

<u>“The Occupier” – Add “The Occupier”</u>

Selecting the ‘The Occupier’ Button with the Add “The Occupier” Options will perform the selection of the Affected Properties in the same way as if the “The Occupier” had been selected by itself.

Selecting these buttons allows an occurrence of “The Occupier” to be included against the Affected Properties that have been selected. Where the Affected Property that has been selected may have Occupier Role records associated to it these Occupier Role records are not included in the selection.

Example

- Martin Smith owns Property 13 Smith St, Geac and his Mailing Address is 13 Smith St, Geac and Martin occupies the Property.
- William Bird owns Property 14 Smith St, Geac and his Mailing Address is 96 Young St, Goodwood and William does not occupy the Property.
- Robyn White owns Property 17 Smith St, Geac and her Mailing Address is Unit 6, 129 Smith St, Geac.
- Greg Wood occupies Property 17 Smith St. Geac
- Tom Herd occupies Property 19 Smith St. Geac and Tom’s Mailing Address is the same as the Property

If the above properties were selected as Affected Properties using the “The Occupier” and the Add “The Occupier” Options they would appear as follows on the Affected Properties Maintenance form.

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Occupier**	**“The Occupier”**	
14 Smith St, Geac	**Occupier**	**“The Occupier”**	
17 Smith St, Geac	**Occupier**	**“The Occupier”**	
19 Smith St, Geac	**Occupier**	**“The Occupier**	

Other

Selecting this field allows for a person other than the Role’s above being selected as the Affected Person. This may be a person that may not even live in the Council, but has an interest in what happens to the Application, so they can be added as an Affected Person.

When selecting this Option the Names Search Profile form is displayed to allow the person or company to be selected or if they are not already in the Names database they can be added.

Options – Concatenate Owner

When the Concatenate Owner Option is flagged on then all Owners Names will be concatenated when added as an Affected Property.

The first Owner listed will be selected as the identity nominated as the Owner and it will their mailing address that will be used for any documentation that will be issued to them.

If the Owners consist of a mixture of persons and companies then the above will still apply. The first Owner listed will be selected.

Example

- Property 13 Smith St, Geac has owners of Martin Smith (mailing address of 13 Smith St, Geac), Nora Smith (mailing address of 13 Smith St, Geac) and Garland Cards Pty Ltd (mailing address of 154 Port Rd, Geac)

If the above property was selected as an Affected Property nominating the Option “Concatenate Owner” they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Owner**	**Martin Smith & Others**	**13 Smith St, Geac**

Options – Concatenate Occupier

When the Concatenate Occupier Option is flagged on then Occupier Names will be concatenated when added as an Affected Property.

The first Occupier listed will be selected as the identity nominated as the Occupier and it will their mailing address that will be used for any documentation that will be issued to them.

If the Occupiers consist of a mixture of persons and companies then the above will still apply. The first Occupier listed will be selected.

Example

- Property 13 Smith St, Geac has Occupiers of Martin Smith (mailing address of 13 Smith St, Geac), Nora Smith (mailing address of 13 Smith St, Geac) and Garland Cards Pty Ltd (mailing address of 154 Port Rd, Geac)

If the above property was selected as an Affected Property nominating the Option “Concatenate Occupier” they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Occupier**	**Martin Smith & Others**	**13 Smith St, Geac**

Options – Add "The Occupier"
When the Add "The Occupier" Option has been flagged on then an occurrence of "The Occupier" is generated for Properties that have been selected as an Affected Property. Please refer to the individual Selection Options for details of the use of this option.

Options – Concatenate Same Name/Address

NOTE:- This Option only displays if the Authorised Function 'Automatic Concatenation of Affected Properties' has been flagged on within the System Parameters.

When the Concatenate Same Name/Address Option is flagged on then Owner/Occupier Names will be concatenated when added as an Affected Property.

However the Concatenation process checks the Names and Addresses of Roles records and where the Surname and the Mailing address is the same for a number of people then they will be concatenated. If the surname and or mailing address are different then it is not concatenated.

This applies to Owner and Occupier Role records.

Example

- Property 13 Smith St, Geac has Owners of Martin Smith (mailing address of 13 Smith St, Geac), Nora Smith (mailing address of 13 Smith St, Geac) and Garland Cards Pty Ltd (mailing address of 154 Port Rd, Geac)

If the above property was selected as an Affected Property nominating the Option "Concatenate on Name/Address" they would appear as follows on the Affected Properties Maintenance form

Affected Property		**Name**	**Mailing Address**
13 Smith St, Geac	**Owner**	**M & N Smith**	**13 Smith St, Geac**
	Owner	**Garland Cards Pty Ltd**	

Names

Names Maintenance Form

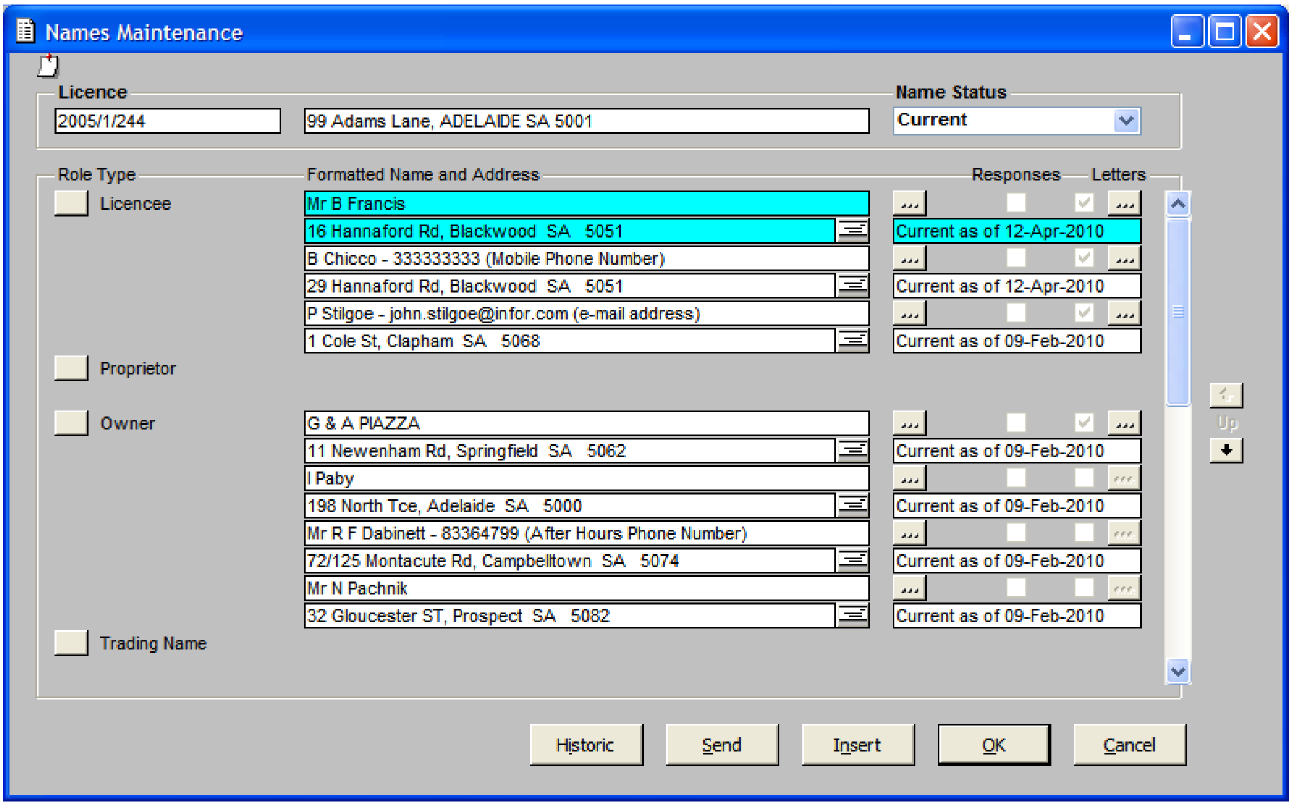
The Name Maintenance Form provides the User with a selection of Role Types that may be associated with the Licence. This form allows for the addition or deletion of names, with the ability to send acknowledgment letters and accept responses to these letters.

A Name Status Drop down list is available on the top right section of the Names Maintenance form. The Name Status drop down list has three choices:

- Current
- Historic
- Current & Historic

The default Name Status is set to Current, this will display all current Name roles.

NOTE: When Pathway Debtors / COM Debtors has been defined as one of the Accounting Methods then the Names Maintenance form will show the Debtor ID field and also the Customer Profile Button will be available for selection.



Name Maintenance Form

Licence

The Licence is made up of two fields one being the Licence Numbering Code and the other the full description of the Licence Location.

Name Status

As of Release 2.12 this form allows names to be made Historic. A Name Status Drop down list has been added to the top right section of the Names Maintenance form. A Historic button now appears on the bottom of the form. The Name Status drop down list has three choices:

- Current
- Historic
- Current & Historic

The default Name Status is set to Current, this will display all current Name roles.

Making a Name Historic.
Highlight the names to be made historic and press the “Historic” button. The selected names will be made historic and will be removed from the “Current” name list

Selecting a Name Status of “Historic” will display all the historic names against the licence.

Selecting “Current & Historic” will display all the names against the Licence. “Historic names will have an added description of (Hist) after the name.

NOTE: The Licencee and Trading Name Roles should only be changed via the Transfers Option and not by the ‘Historic’ button.

Role Type
The Role Types are displayed down the left hand side of the screen and may be selected by pressing the button alongside each Role Type. These may be used to place the focus on the particular Role Type, or copy a Name from one Role Type to another.

Debtor ID
The Debtor Id field is only displayed when the Licensing Class has been defined as using Pathway Debtors / COM Debtors as one of the Accounting Methods. This field allows the User to see if a Debtor Number has been assigned to the Role Type that is to be used for the Debtor processing and if blank allows the linking of the Debtor to the Role Type via the Customer Profile Button.

Debtor Enquiry
The Debtor Id field is only displayed when the Licensing Class has been defined as using Pathway Debtors as one of the Accounting Methods. In conjunction with the Debtor Id field it is possible to detail out to the Debtor Enquiry menu for the Debtor Id using this option. The Detail Option is controlled by User Security within the Licensing Class and therefore access to this function needs to be given to the User to enable the display and selection of this Detail Option.

Formatted Name and Address
The Formatted Name and Address Field details the full Name and Address that has been created as a new address or selected from the Name and Address Register.

Clicking the ‘envelope’ button displays the Mailing Address Enquiry form.

Detail Button
A detail button is located at the end of each Name and Address. Selecting this button will display the Personal Name and Address Maintenance Form.

Letters
Highlighting a Role Type will then enable a Letter to be created and if required a Response.

Customer Profile Button
The Customer Profile Button is only displayed when the Licensing Class has been defined as using Pathway Debtors / COM Debtors as one of the Accounting Methods. This field allows the User to maintain the linking of the Debtor to the Role Type via this Button.

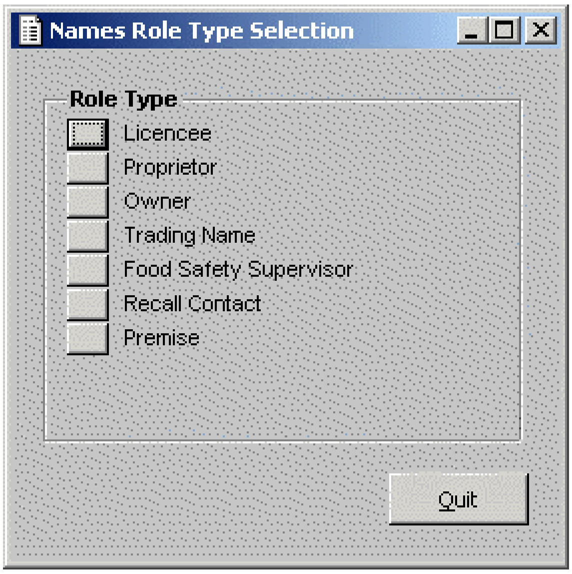
Historic Button
The Historic Button allows the changing of a Role Record to being Historic. By placing focus (highlighting) on the Role Record that is required to become Historic and selecting this Button the Role Record is then changed to a Status of Historic.

Send Button

The Send Button allows for the generation of Letters for those Role Records that have been highlighted as requiring to receive the Document. Selection of this Button displays the Licensing Document Generation Form for processing of the documentation.

Name Role Type Selection Form

The Name Role Type Selection form allows the User to select from a list of predefined Role Types that may be added to the system.



Names Role Type Selection Form

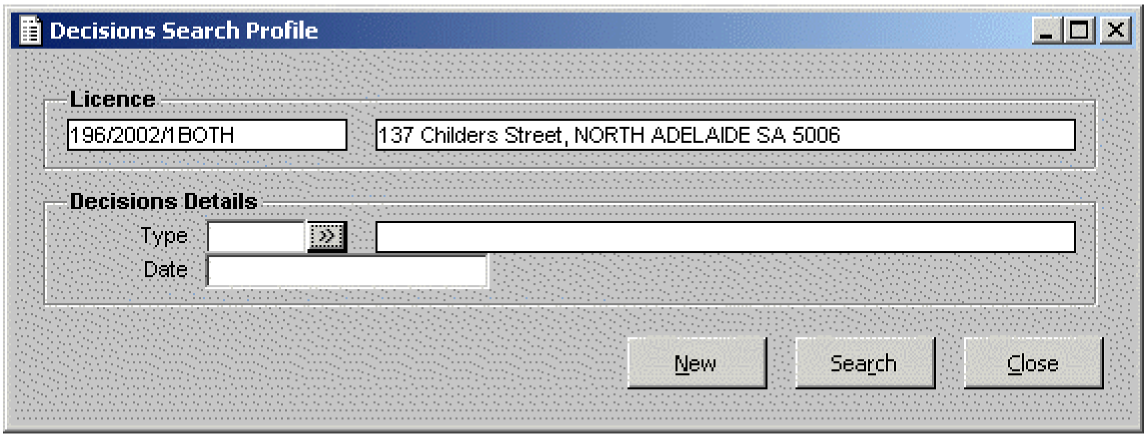
Role Type

When adding a Name to the Licence it must be created as one of the Role Types that have been defined for the Licence Class. This form displays when the Name Role Type has not been defined and the Insert Option has been used on the names form. The User needs to select the required Role Type before the Names Search Profile Form will be displayed.

Decisions

Decisions Search Profile Form

The Decision Search Profile Form may be used to Search for Decisions that can be placed against the Licence itself. This form allows the User to Search for existing Decisions or create new Decisions.



Decisions Search Profile Form

Decision Expiry - The Expiry Date on Decisions is calculated depending on how and when dates are entered in this field.
The Rules are as follows:

Adding New Approval Decisions:

- Leaving the Expiry Date Field blank and clicking OK will calculate the Expiry date from how it is set up in Parameters.
- If an existing Expiry Date is on the Licence, it adds that Period to the Expiry Date
- On an Existing Decision if there is no Expiry Date on a Licence, and it is left blank at entry, the Expiry Date will be based on the Decision Date.
- When a new Approval Decision is added to the Licence, and the User enters a date in the Expiry Field, the Expiry Date will be calculated from that.
- Any Rejected Decisions on a Licence date cannot have their Expiry Date maintained.

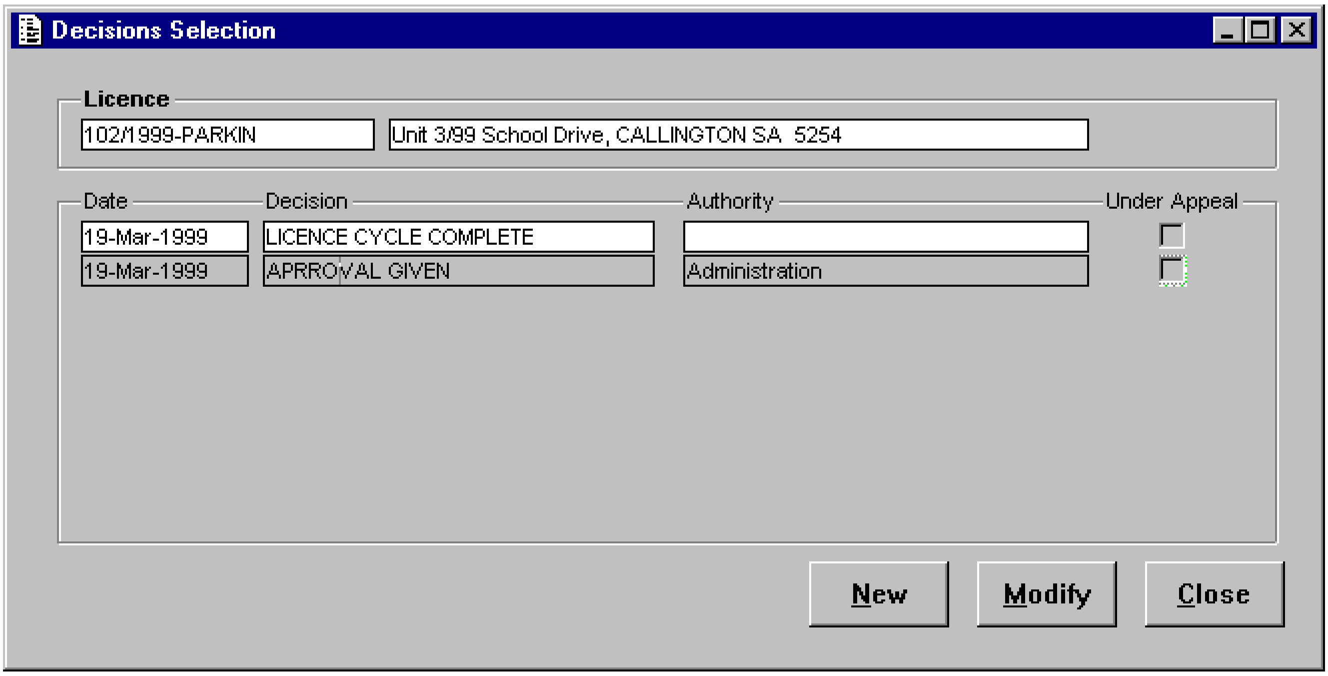
Licence
The Licence Field details the actual Licence that you wish to assign a Decision to and its Primary Location.

Decision Details - Type
This field may be used to enter a decision Code, or use the Pop Up Button to select from a list of predefined Decisions.

Decision Details - Date
This field may be used to key a date that a Decision may have been entered and click the Search button to begin the Search Process.
Or a the New button may be selected to add a new Decision to the Licence.

Decision Selection Form

The Decision Selection Form lists any previous Decisions that have been entered on an Licence.



Decision Selection Form

Licence
The Licence Field details the actual Licence that you wish to assign a Decision to and its Primary Location.

Date
This field issued to key a date that a Decision is granted on this Licence.

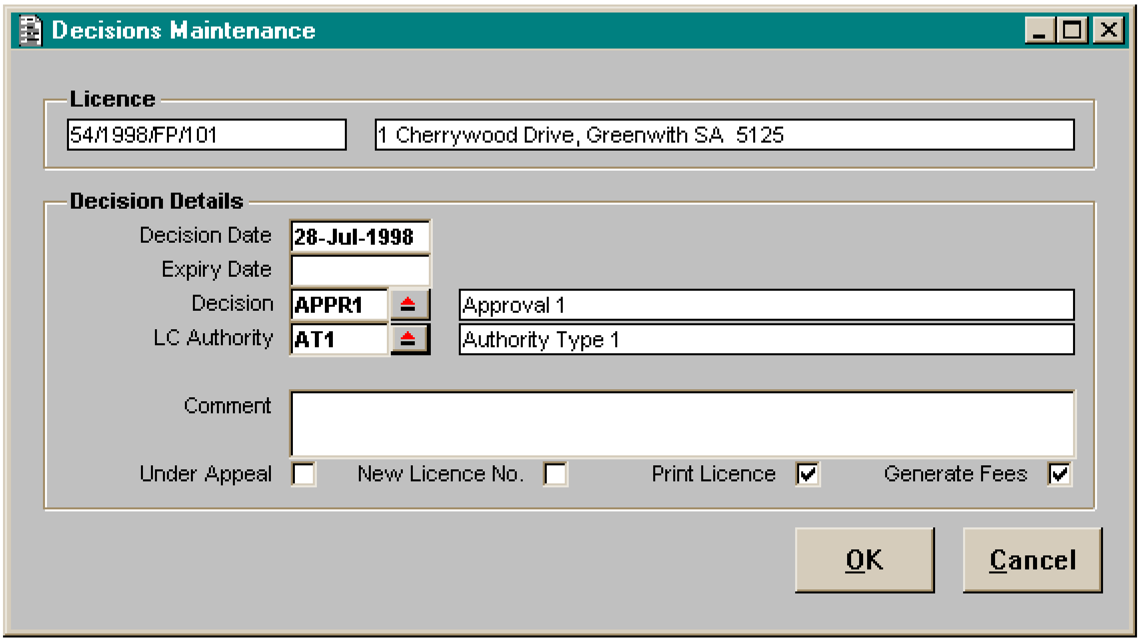
Decision
This field details the actual Decision assigned to the Licence.

Authority
This field details the Authority Code/Name of the person or body that assigned the Decision to the Licence.

The User may also click the New Button to add a New Decision from here.

Decisions Maintenance Form

The Decision Maintenance Form allows the User to maintain an existing Decision, either adding addition information to an existing Decision or modifying it.



Decisions Maintenance form

Licence

This field details the Licence and its Primary Location. When in Multi-Maintenance a Detail Button will display to allow the User to see which Licences will be affected by the entry of the Decision.

Decision Details - Date

This field details the date a Decision can be entered on. The system will default to the system date, but can be changed by double clicking in the field and select a specific date.

Approval Number

This field will only be displayed on the maintenance form, once an Approval Decision has been entered and the Data saved. Upon re-entry to the form, for viewing or modification, the Approval Number will be displayed.

Expiry Date

This field will be displayed once a decision has been entered and expiry date calculated.

Decision

This field is used to enter a Decision Code. The User may either enter the Decision Code if know, or use the Pop Up Button to select from a list of predefined Decision Codes.

Authority

This field may be used to enter an Authority who has granted the Decision. The User may enter the Authority Code if know, or use the Pop Up Button to select from a list of predefined Authority Codes.

Comment

This field is a free text field allowing the User to enter any comments required regarding the Decision.

Under Appeal

If this flag is checked, the Decision on the Licence is Under Appeal. This may then hold any further proceedings on the Licence until results of the Appeal are known. If the flag is unchecked, the Decision is deemed as current.

If a Under Appeal Status has been defined for the Decision within the Decision Parameters, when the Under Appeal checkbox is checked on then the Licence will take on the Status that has been defined for the Under Appeal. If no Under Appeal Status has been defined for the Decision within the Decision Parameters then the Licence will take on the Status of the Decision.

NOTE – The Under Appeal Status and its functionality is only applicable to Licence Decisions. This Status will not be used when the Under Appeal checkbox is checked on for a Consent Decision.

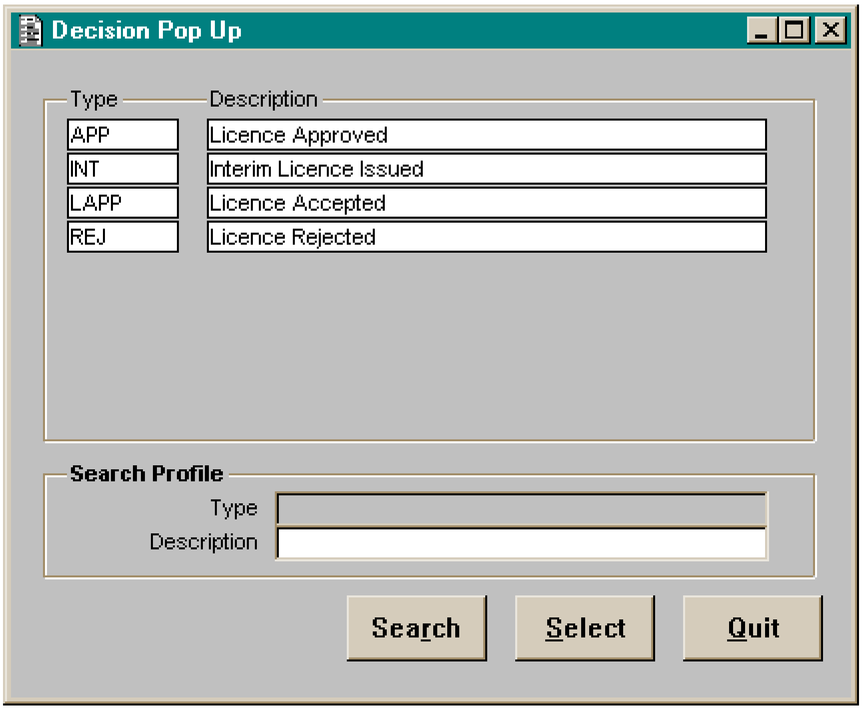
New Licence No
This check box will only be displayed if the Decision entered is an Approval Decision. This then allows the User to allow a new Licence number to be assigned to the Licence upon renewal.

Generate Fees
This field will only be displayed if there are Approval Fees entered at the parameter level, and an Approval Decision has been entered. Checking this box on will add the particular fee to the Licence.

Print Licence
This field will only be displayed on the maintenance form, if a Merge Type for a Licence Print has been set up at parameter level. If checked on then the User is able to automatically print a Licence once an Approval Decision has been entered.

Decision Pop Up Form

The Decision Pop Details all occurrences of predefined Decision Codes and their full description.



Decision Pop Up Form

Type
This field details the Decision Code.

Description
This field details the full Description of the Decision Code.

Search Profile - Type
This field enables the User to enter a Type, click on the Search Button and search for their specified Criteria.

Search Profile - Description
This field enables the User to enter a Description, click on the Search Button and search for their specified Criteria.

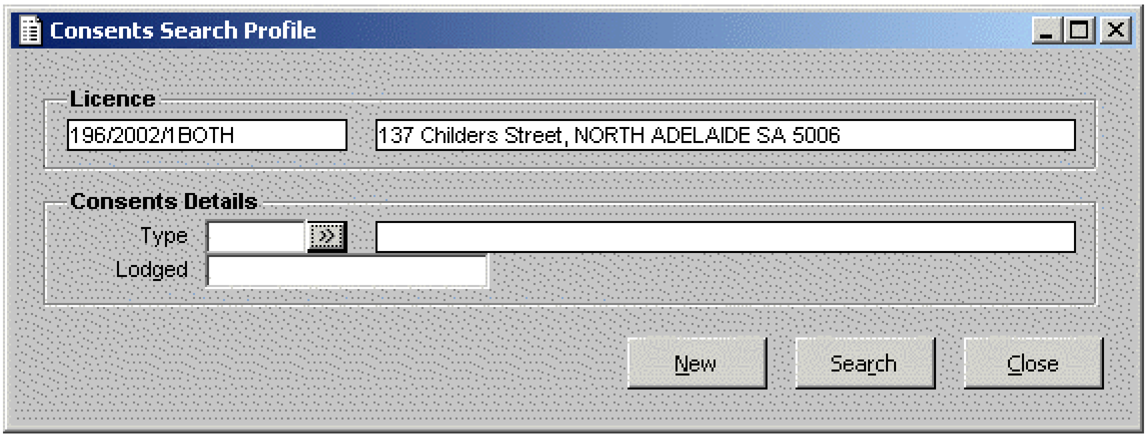
Authority Type Pop Ups and Rejection Type Pop Ups are described in the previous section of this document.

Consents

A Consent may be added to a Licence to allow a certain sections of the Licence to proceed prior to final Approval on the whole Licence.

Consents Search Profile Form

The Consents Search Profile enables the User to either search on existing Consent Codes, or click the New Button to create a new Consent Code.



Consents Search Profile Form

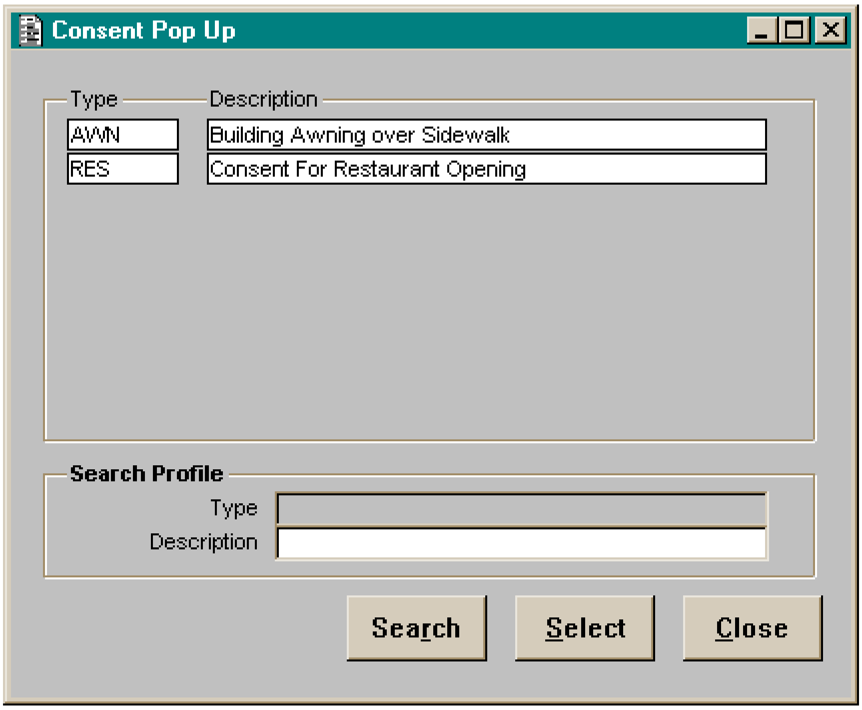
Licence
This field details the Licence Number and actual Location of the Licence.

Consents Details - Type

This field allows the User to enter a known Code for a Consent, or select the Pop Up Button to choose from an existing Consent Code.

Consents Details - Lodgement Date
This field allows the User to enter a known Lodgement Date to search on Consents.

Consent Pop Up Form



Consent Pop Up Form

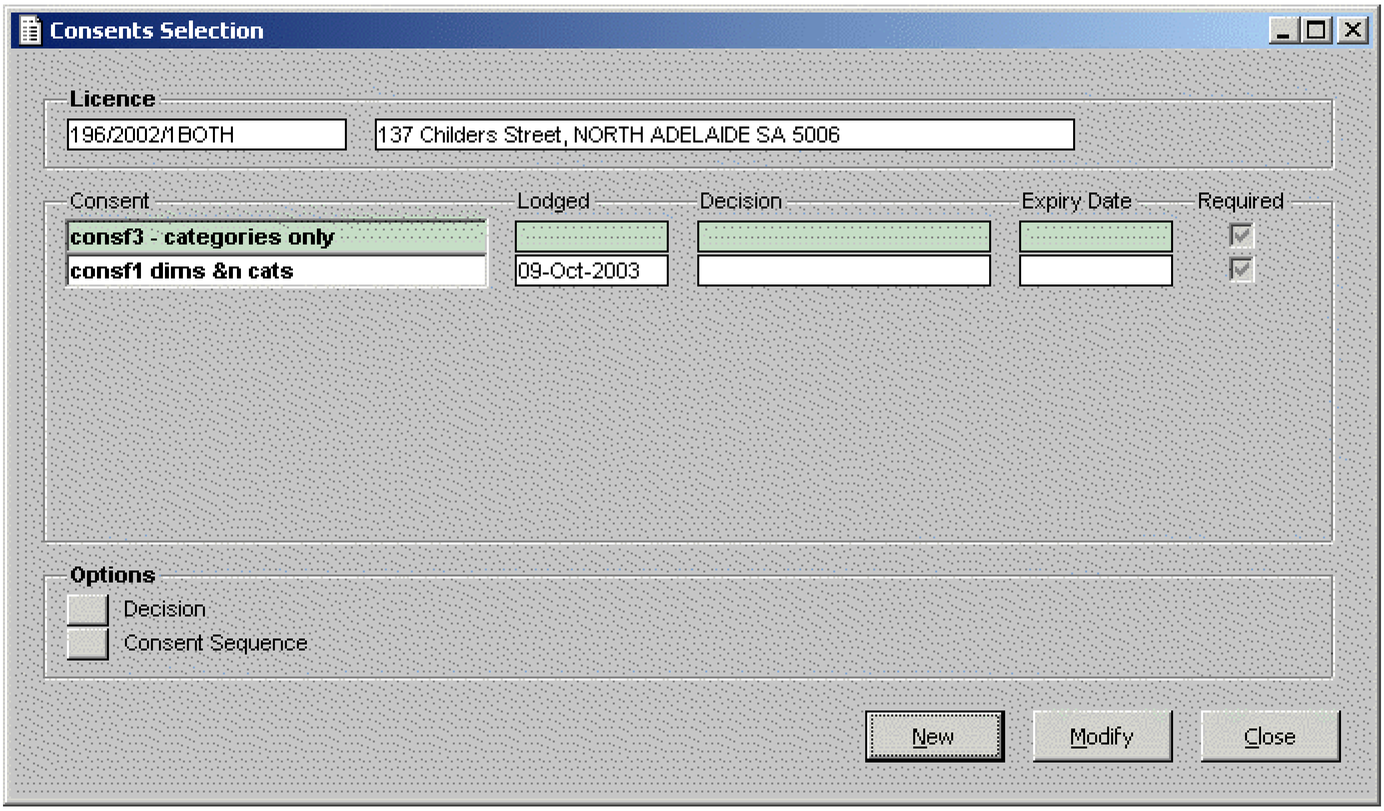
Type
The Consent Pop Up Button consist of the predefined Types.

Description
The Consent Pop Up Button consists of the Type and this field which gives a full Description of the Type.

Search Profile - Type
The Search Profile form enables data to be entered into this field - the Type option and click the Search Button to find the selected criteria.

Search Profile - Description
The Search Profile also enable the User to enter a Description in this field. Click the Search button after entering a Description to being the Search.

Consents Selection Form



Consents Selection Form

Licence
This field details the Licence Number and actual Location of the Licence.

Consent
This field details the Consent Code Type.

Lodged
This field details the date that the Licence was lodged.

Decision
This field details the actual Decision placed on the Consent.

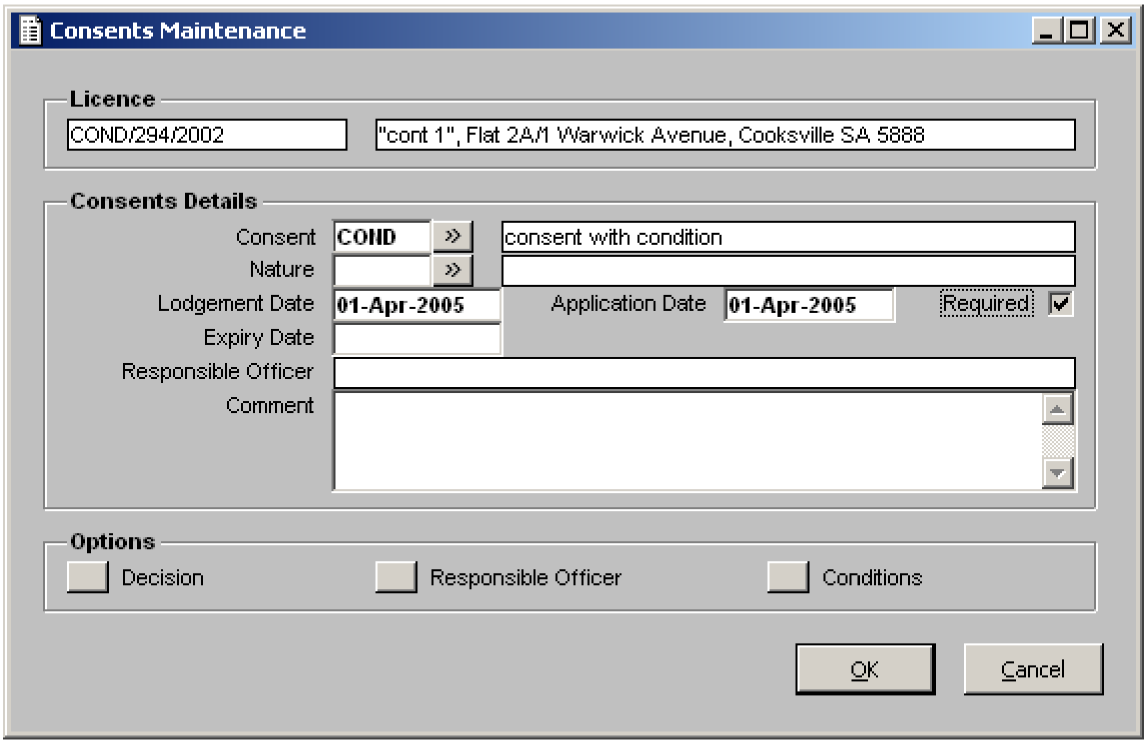
Expiry Date
This field details the Expiry Date of the Consent.

The Required field may be selected and checked if the User wishes to ensure that a particular Consent Type is required on a Licence before it may proceed.

Options - Decision
Selecting the Decision Options Button will allow the entry or maintenance of Decisions against the Consent currently in focus.

Options – Consent Sequence
Selecting the Consent Sequence Options Button allows the User to re-sequence the order of the Consents.

Consents Maintenance Form



Consents Maintenance Form

Licence
This field details the Licence Number and actual Location of the Licence.

Consent Details - Consent

This field details the Consent Type. The Pop Up Button may be selected if the Code is not known.

Consent Details - Nature

This field details the Nature of the Consent. The Pop Up Button may be selected if the Nature Code is not known.

Consent Details - Lodgement Date
This field details the Lodgement Date of the Licence.

Consent Details - Application Date
This field details the actual date of the Licence received.

Consent Details - Required
This field if checked decides if the Consent Details is required on this Licence.

Consent Details - Expiry Date
This field details the Expiry Date of the Consent.

Consent Details – Responsible Officer
This field details the Names of the Responsible Officers. The responsible Officers can be maintained by using the Responsible Officer Options Button.

Consent Details - Comment
This field allows the User to enter a comment on this particular Consent.

Options – Decision
This button allows the User to detail out to the Decision form. This allows the User to enter Decisions against Consents.

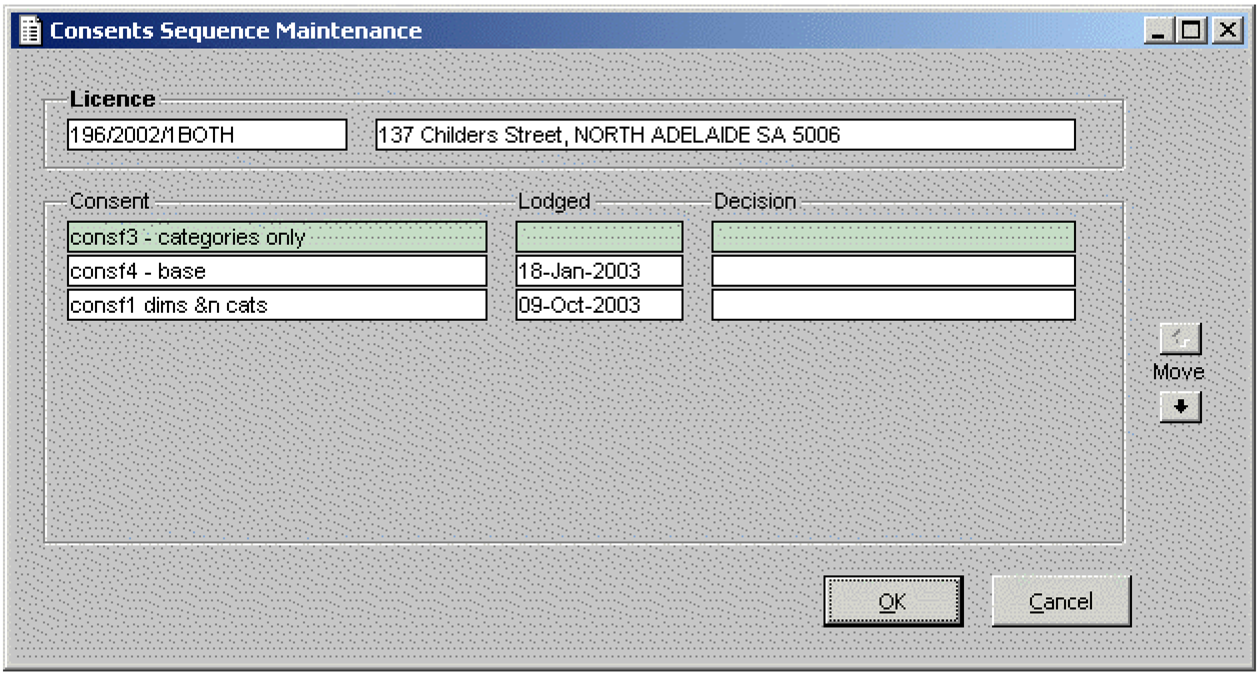
Options – Responsible Officer
This button allows the User to detail out to the Responsible Officer form. This allows the User to enter or change the Responsible Officers assigned to the Consent.

Options - Conditions
Pressing this button will display any Conditions that have been loaded for the Consent. If this Option is not shown then there are no Conditions associated to the Consent.

NOTE: - When these Consents are used in Licensing Maintenance, in Licence Entry, Change Licence Type or inserting a new Fee, the assigned Condition will be loaded onto the Licence. The system will check for existing Standard Conditions and these Consent Conditions will only be loaded once if Standard but will always load if Non Standard. As the Conditions Option is a Secured Option it will only be available for use where the Council is authorised to the function.

Consents Sequence Form

The Consents Sequence Form may be selected from the Consents Selection Form. Consents may be selected and their position shifted.



Consents Sequence Maintenance Form

Licence
This field details the Licence Number and actual Location of the Licence.

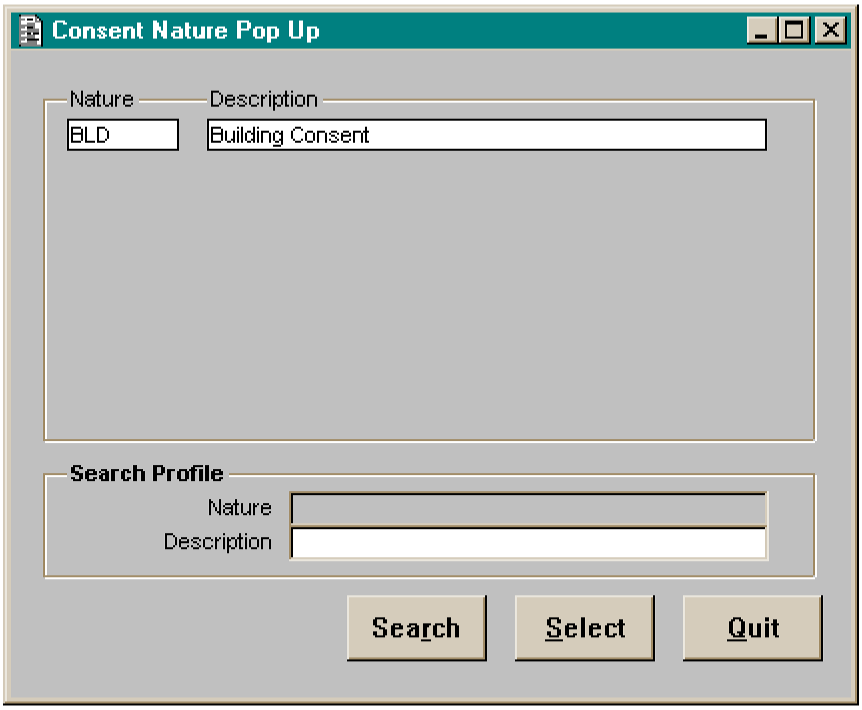
Consent
This field details the actual Consent Type.

Lodged
This field details the date the Licence was lodged.

Decision
This field details the Decision assigned to the Consent.

Consent Nature Pop Up Form

The Consent Nature Pop Up Form details pre-defined Consent Natures.



Consent Nature Pop Up Form

Nature
Consent Natures may be assigned to a Consent to define specific groups of Consents. For Example it may be a Commercial Consent, a Rural Consent etc.

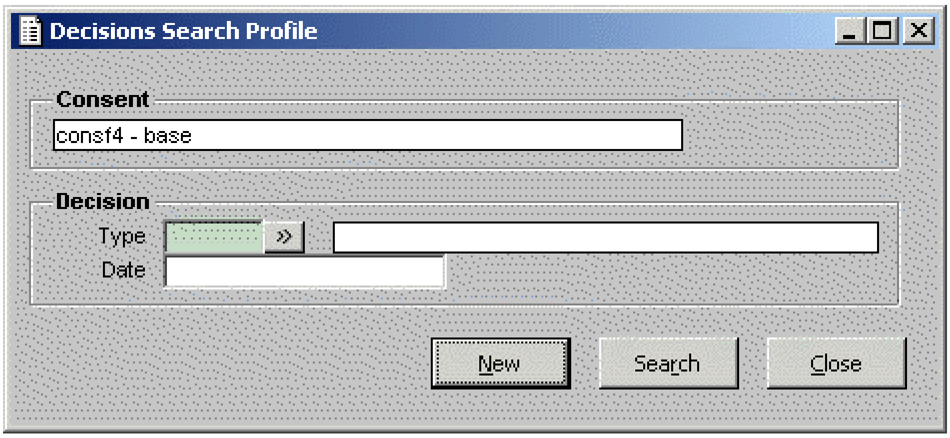
Description
This field give a full Description of the Consent Nature.

Search Profile - Nature
The Search Profile allows the User to enter a Nature and click on the Search Button. A list of matching Natures will be provided.

Search Profile - Description
A Description may be keyed as other Search criteria to enable the User to find a Consent Nature.

Consent Decisions Search Profile Form

Consent Decisions may be added to the Consent to verify if the Consent is Granted or Denied.



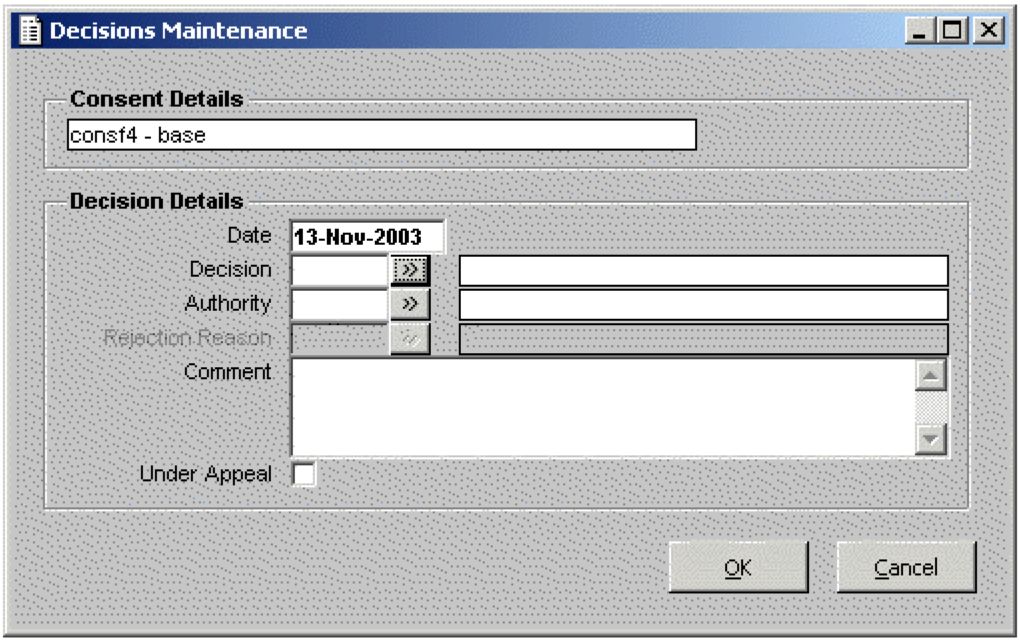
Decisions Search Profile Form

Consent
This field details the Consent that the Decision will be based upon.

Decision - Type
This field may be used to enter a Decision Type to Search for.

Decision - Date
This field may be used to enter a Date that a Decision may have been entered on. Key a date, and then click the Search Button to perform the Search

Decisions Maintenance Form



Decisions Maintenance Form

Consent Details
This field details the Consent that the Decision will be based upon.

Decision Details - Date
This field will hold a valid date. Today's date will default, but may be changed by double clicking in the field.

Decision
This field allows the User to enter a Decision Code, or click the Pop Up Button to select a pre-defined Code.

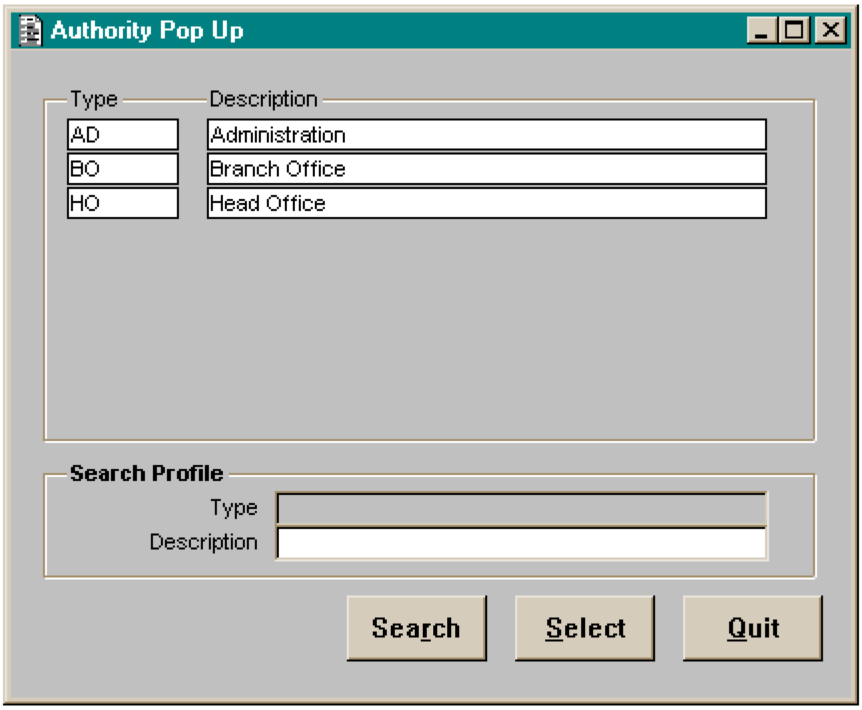
Authority
This field allows the User to enter a Authority Code, or click the Pop Up Button to select a pre-defined Code.

Rejection Reason
This field allows the User to enter a Rejection Code, or click the Pop Up Button to select a pre-defined Code.

Comment
This free format field allows the User to enter a comment on the Specific Decision being entered.

Under Appeal
If this field is checked, then the Decisions is being Appealed. If the field is unchecked no Appeal is pending. This form has three Pop Up Buttons: Decision, Authority and Rejection Reason. Decision Pop Up is described previously.

Authority Pop Up Form



Authority Pop Up Form

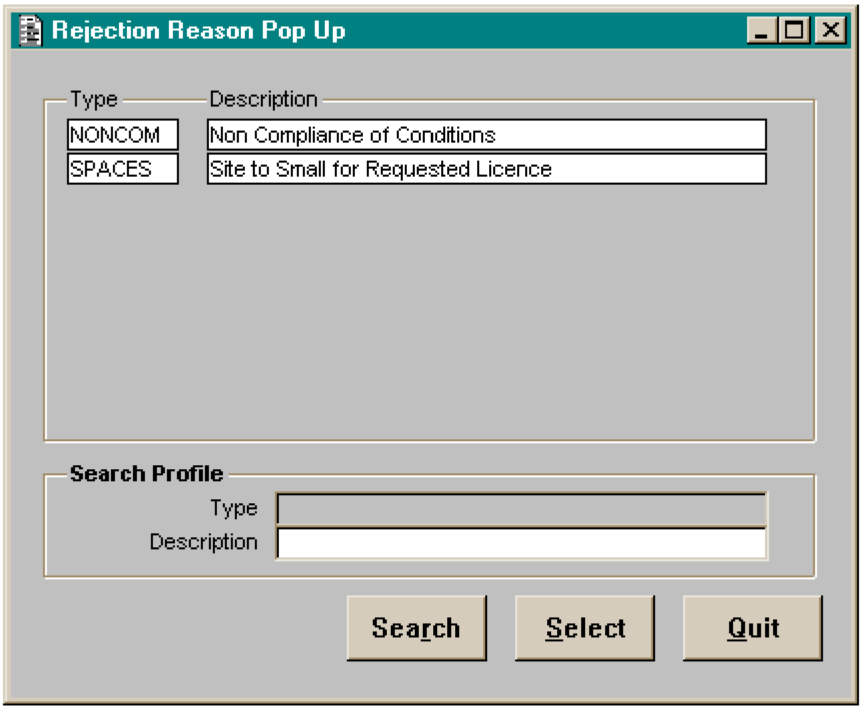
Type
This field details the Code given to the Authority Type.

Description
This field gives a full Description of the Code.

Search Profile - Type
The Type field may be used to enter a Type then click the Search Button to produce the result.

Search Profile - Description
The Description Field may be used to enter a full or part Description, then clicking on the Search button to produce the results based on your entered criteria.

Rejection Reason Pop Up Form



Rejection Reason Pop Up Form

Type
This field details the Code given to the Decision Type.

Description
This field gives a full Description of the Code.

Search Profile - Type
The Type field may be used to enter a Type then click the Search Button to produce the result.

Search Profile - Description
The Description Field may be used to enter a full or part Description, then clicking on the Search button to produce the results based on your entered criteria.
This field details the Code given to the Decision Rejection Type.

Fees

Fees Maintenance Form

The Licence Fee Maintenance Form allows the User to Enquires, Insert and Modify Fees on a Licence. The Form consists of the following fields.

NOTE: Where the user has focused on a Timesheet Fee and selected the Ajustment Option the following message will be displayed:

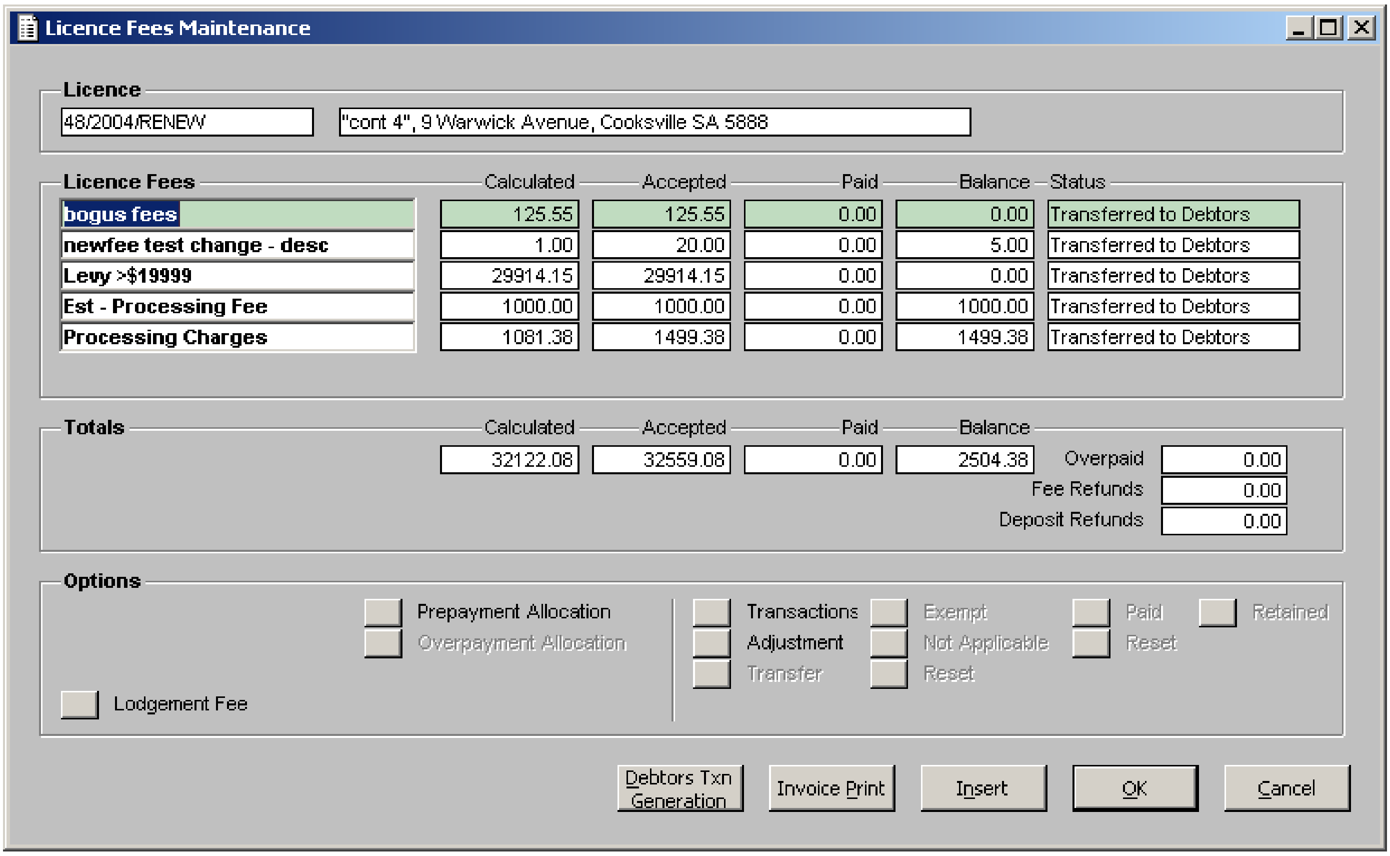
“Do you want to adjust the Timesheet?
(Otherwise the Normal Adjustment is performed) ‘
Yes,No,Cancel”

If the user selects ‘Yes’ then the Time Adjustment form is displayed allowing the changing of the actual recorded times that have been used to calculate the fee.

If the user selects ‘No’ then the standard Licensing Fees Maintenance form is displayed and the user is able to enter in the New Accepted Fee.

It should be noted that the standard Debtor Interface function in that fees cannot be increased once they have been transferred to debtors is applied to these Adjustments. Timesheet Generated fees can only be reduced once they have been transferred to Debtors.

Conversely, were the Application is not using the Debtor Interface function then fees can be adjusted up or down at any time but once the fee has been Receipted then the Fee can only be increased. The user will not be allowed to decrease the dollar value of the fee below the Receipted amount.



Fees Maintenance Form

Licence

This field consists of two boxes. The first field details the actual Licence Number and Type, and the second the Primary Location of the Licence.

Licence Fee

This field will detail any fees that have been added to the Licence.

Calculated

This field details the amount of fee that has been calculated from predefined parameters.

Accepted

This field details the amount of fee that has been Accepted for payment. The User may modify this field for each particular fee.

Paid

This field details the actual dollar value paid against each individual fee.

Balance

This field details the balance owing against each individual fee.

Refunded

This field will show the dollar value of any fee that may have been refunded.

Status

This field details the status of the particular fee involved. Once one of the buttons described below are activated against the fee, its status will be reflected in this field.

> NOTE: When using Pathway Debtors as the Accounting Method the Status Field will display the Status of the Fee as to whether the fee is awaiting transfer to Debtors or has been transferred to Debtors.

Totals - Calculated

This field details the actual Total of all the fees Calculated that are attached to this Licence.

Totals - Accepted
This field details the actual Total of all the fees Accepted that are attached to this Licence.

Totals - Paid
This field details the actual Total of all the fees Paid that are attached to this Licence.

Totals - Balance
This field details the actual Total of all the fees Balance that are attached to this Licence.

Totals - Refunded
This field details the actual Total of all the fees Refunded that are attached to this Licence.

Options

The Options buttons allow further maintenance to be carried out. Refer to the individual forms activated by selecting each button.

Options – Lodgement Fees
The Lodgement Fees button can be used to load all Fees assigned in a Lodgement Option.

When this option is used, all Fees that are assigned to the Licence Type are collected and displayed in a selection window. Each of the fees has a check box next to it and users are able to check OFF any that they feel are not required.

When the OK button is then selected all fees that are still checked ON will be added to the Licence.

Where the selected fees require Dimensions or Categories for calculation the relevant screens are displayed for values to be entered.

The insertion of other fees can still be handled via the Insert Button.

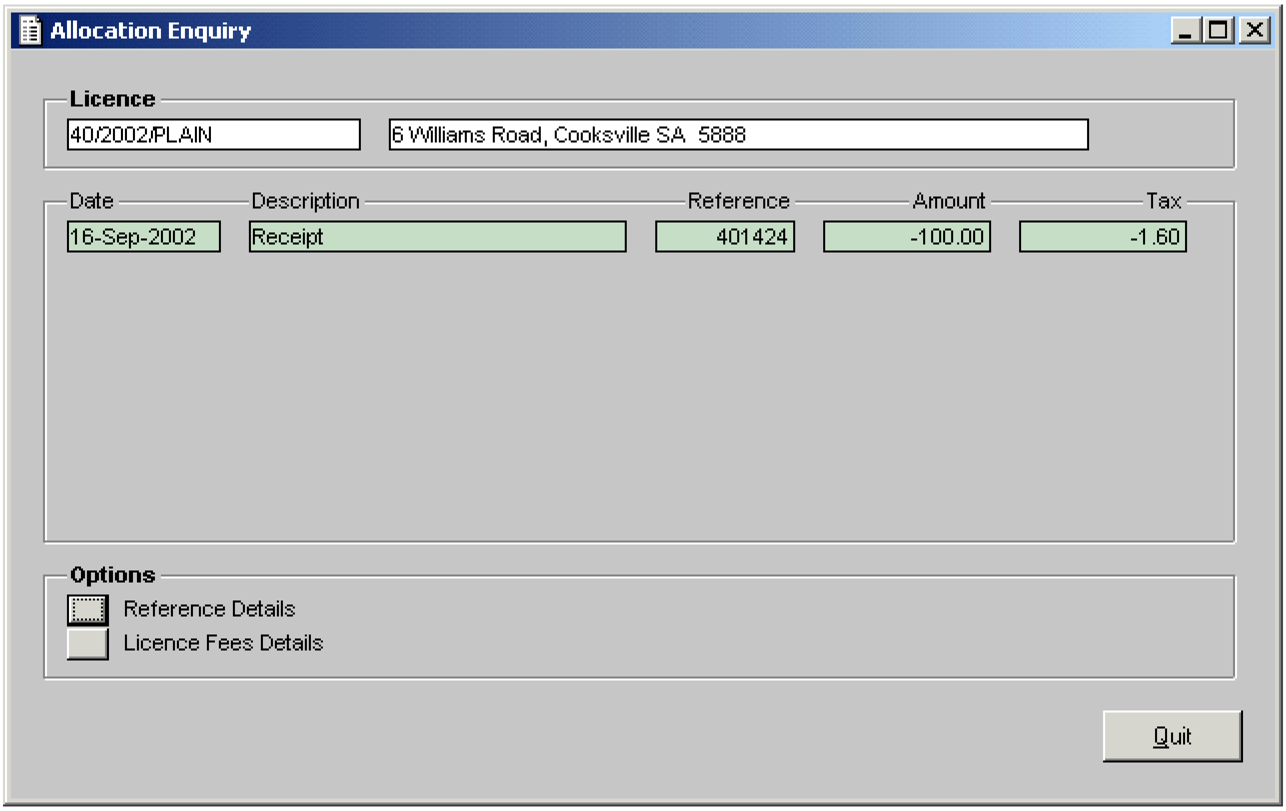
Debtors Txn Generation
The Debtors Txn Generation Button is used to transfer the Fee Transactions to the Pathway Debtors Module. Only those Fees where the Status is showing as Awaiting Trans to Debtors will be processed. When the User selects this Button the Names Maintenance form is displayed to allow the selection of the Name / Debtor that the transactions are to be transferred to.

NOTE: The Debtors Txn Generation Button is only displayed when using Pathway Debtors as the Accounting Method for the Licence.

Invoice Print
The Invoice Print Button allows the generation of an Invoice from the Fees on the Licence. Selecting this Button displays the Invoice Print Form enabling the User to nominate the Merge Type and Invoice to be printed.

Allocation Enquiry Form

The Allocation Enquiry Form allows the User to detail out and see any Receipts that have been paid and to allocate the money against a fee.



Allocation Enquiry Form

Licence
This field details the actual Total of all the fees calculated that are attached to this Licence.

Date
This field will show the date that Allocation has been entered in the System.

Description
This field gives a full description of the actual Allocation.

Reference
This field details any Reference that may have been placed against the Allocation.

Amount
This field details the actual dollar value that has been entered against for Allocation.

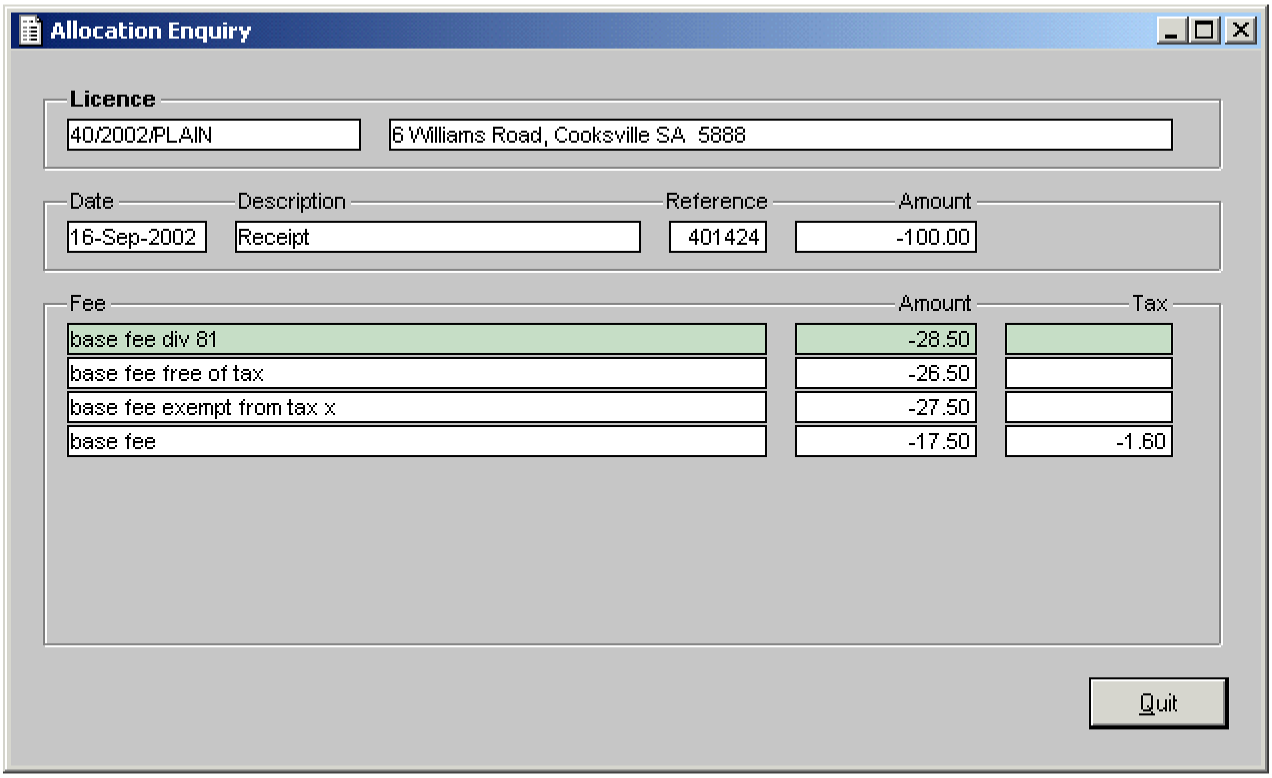
Tax
The Tax Amount applicable for the Fee is displayed in this field if the Fee has been defined as Taxable.

Options – Reference Details
If the Reference Detail Button is selected then the Receipt information is displayed.

Options – Licence Fees Details
If the Licence Fees Detail Button is selected then the Allocation Enquiry Form is displayed.

Allocation Details Enquiry Form

The Allocation Enquiry allows the User to view Allocations made against a Licence Fee. The Form consists of the following form.



Allocation Enquiry Form

Licence
This field details the actual Total of all the fees calculated that are attached to this Licence.

Date
This field will show the date that Allocation has been entered in the System.

Description
This field gives a full description of the actual Allocation.

Reference
This field details any Reference that may have been placed against the Allocation.

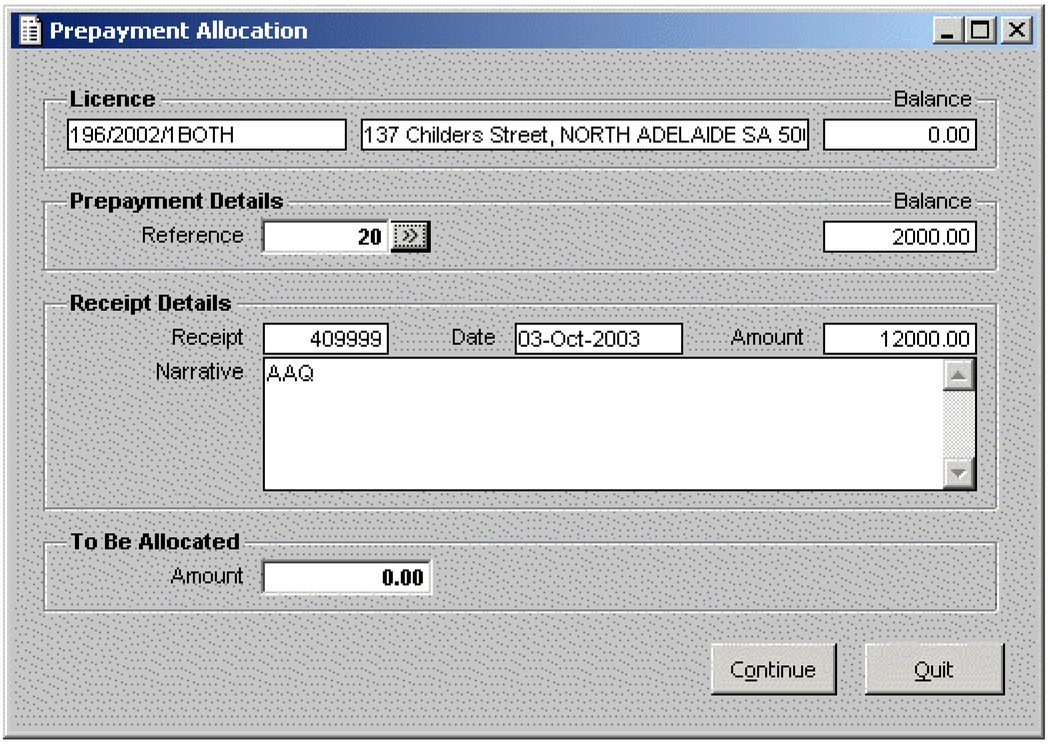
Amount
This field details the actual dollar value that has been entered against for Allocation.

Fee
This field will display the Fee that can be Allocated.

Amount
This field will detail the actual dollar amount for Allocation.

Prepayment Allocation Form

The Pre-Payment Allocation Form allows the User to enter a Receipt/Reference number or detail out to the Pre-Payment detail form.



Prepayment Allocation Form

Licence
This field details the actual Licence currently being accessed along with the Location for the Licence.

Balance
This field details the balance of the Fee for Allocation.

Prepayment Details - Receipt/Reference Number
This field allows the User to enter a Receipt or Reference Number to search on. If the Number is not known then the Pop Up can be used to display a list of Prepayments to select from.

Prepayment Details – Balance
The Prepayment Balance field displays the balance remaining on the Receipt prior to it being allocated to the current fee.

Receipt Details – Receipt
The Receipt Number is displayed in this field.

Receipt Details – Date
The Date of the Receipt is displayed in this field.

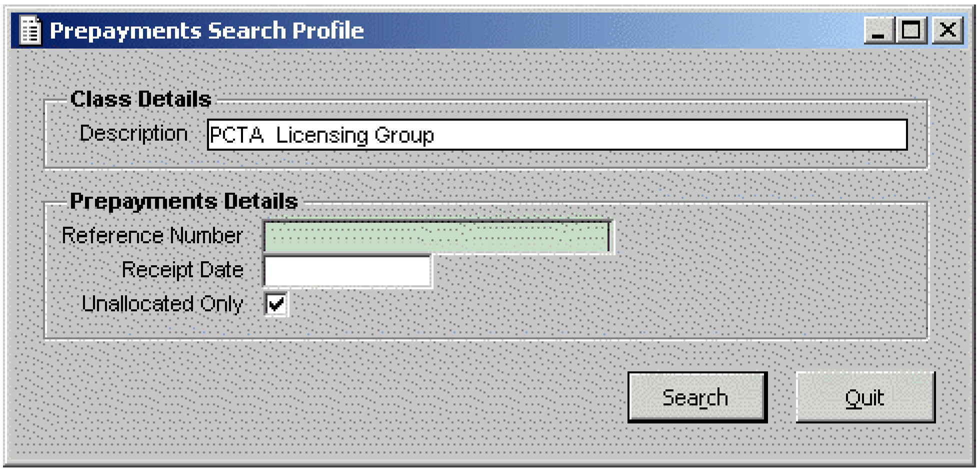
Receipt Details – Amount
The full amount of the Receipt Line is displayed in this field.

Receipt Details – Narrative
Information entered into the Narrative field during Receipting is displayed in this field.

To be Allocated – Amount
The Amount to be Allocated defaults to the outstanding amount of the Licence Fees. This can be changed to another amount if required. The Allocated Amount cannot be greater than the Balance of the Licence.

Prepayment Details Filter Form

The User may key information into these fields if known, or use the Search button to produce a list of Pre-payments already entered into the system.



Prepayments Search Profile Form

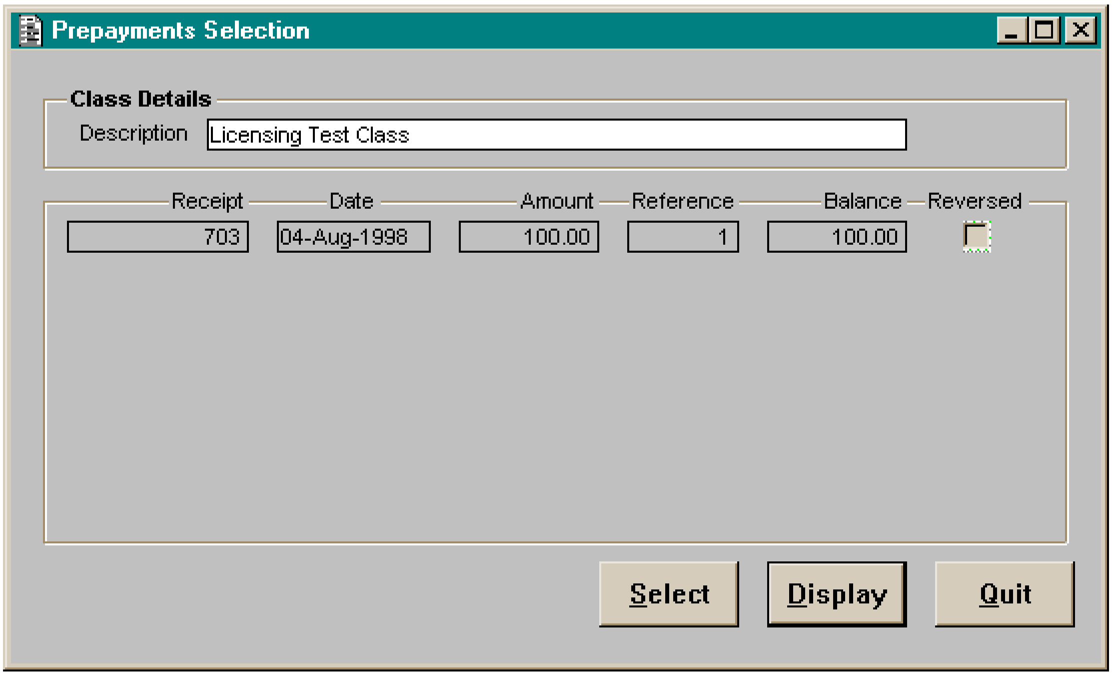
Class Details - Description
This field describes the Class that is currently active.

Prepayments Details - Reference Number
This field allows the User to enter a Receipt or Reference Number to search on. Once details are entered, click the Search Button to proceed with the Search.

Prepayment Details - Receipt Date
This field details the date that may be entered to search for a Pre-payment.

Prepayment Details - Unallocated Only
This box if checked will display unallocated amounts only. If unchecked will find provide details of all pre-payments.

Prepayments Selection Form



Prepayments Selection Form

Class Details - Description
This field details the current Class and Description of the Licence.

Pre-Payment Date
This field details the date that the Pre-payment was made.

Receipt
This field details the actual Receipt Number entered.

Receipt/Reference Number
This field details any Receipt/Reference Number that has been assigned to the Pre-payment.

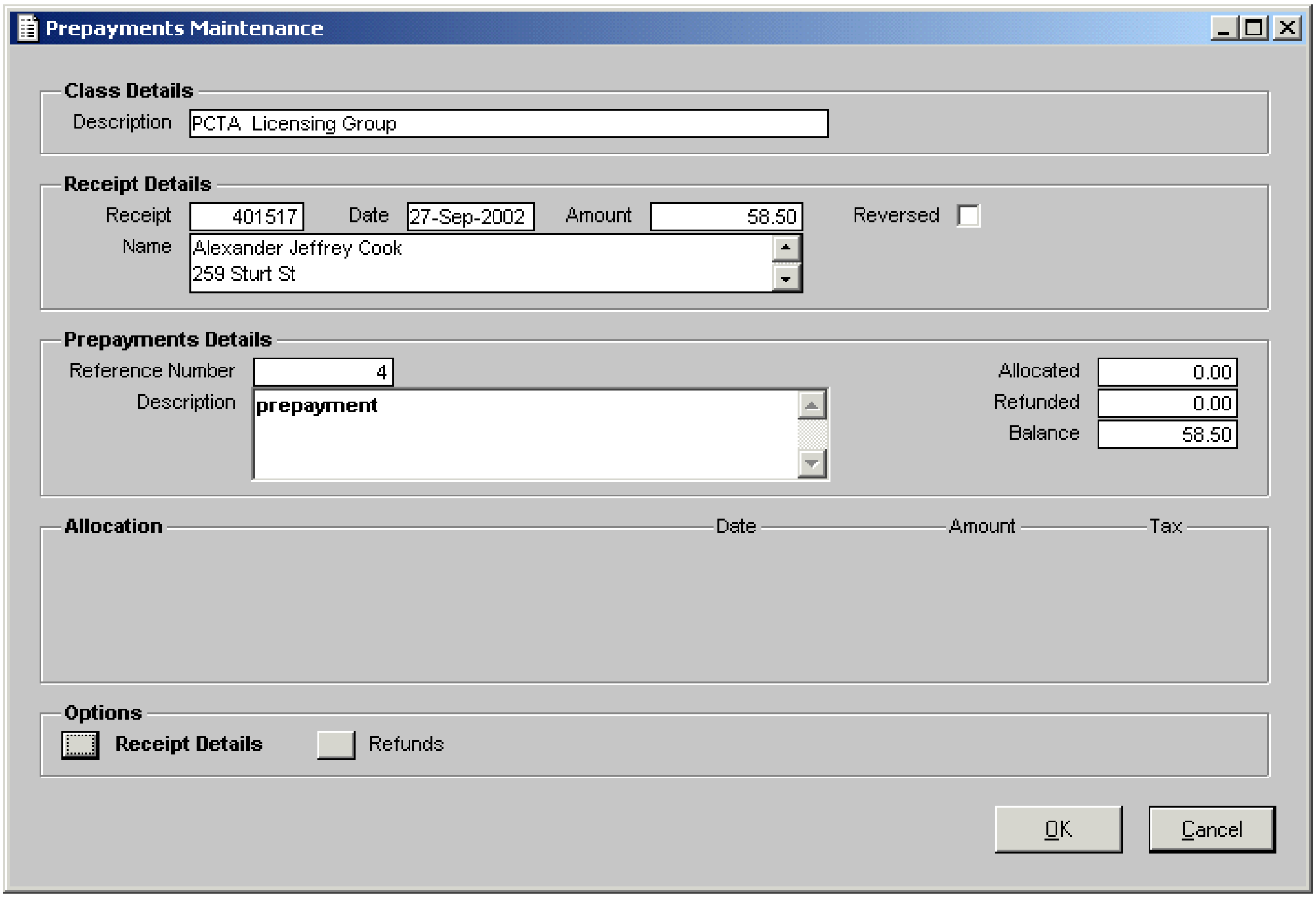
Amount
This field details the actual dollar value of the Pre-payment.

Balance
This field details the dollar value left against the Licence after the Pre-payment has been added.

Reversed
This field if checked on will show that this particular Pre-payment has been reversed.
Clicking the Display Button will detail the User out to the Pre-Payments Maintenance Form.

Prepayments Maintenance / Enquiry Form

The Prepayments Maintenance / Enquiry form allows the User to view and modify Prepayments.



Prepayments Maintenance / Enquiry Form

Class Details - Description
This field details the current Class and Description of the Licence.

Receipt Details – Receipt
This field details the actual Receipt Number entered.

Receipt Details - Date
This field details the date that the Pre-payment was made.

Receipt Details - Amount
This field details the Receipt Amount of the Prepayment.

Receipt Details - Reversed
If the Reversed field is ticked then the Receipt Prepayment has been reversed via Receipting.

Receipt Details - Name
This field details the Name appearing on the Receipt for the Prepayment.

Prepayments Details – Reference Number
The Reference Number is the number that is automatically allocated to the Prepayment at the time of Receipting.

Prepayments Details - Description
The Description that was entered at Receipting is displayed in this field.

Prepayments Details - Allocated
The Allocated field displays the accumulated amount of the Prepayment that has been allocated to Fees.

Prepayments Details - Refunded
If an amount has been Refunded then this will appear in this field.

Prepayment Details - Balance
The remaining Balance of the Prepayment is displayed in this field.

Allocation Details

Any Licenses that have had allocations made against them from this Prepayment will be displayed in the Allocation Details section. This shows the Licence Number and Location that the Licence is for.

Allocation Details - Date
The Date field represents the Date that the allocation occurred against the Licence.

Allocation Details - Amount

The Amount field represents the amount that was allocated to the Licence from the Prepayment Receipt.

Allocation Details – Detail Button
Selecting the Allocation Details Button will take the User to the Summary Form for the Licence that has been allocated with the Prepayment.

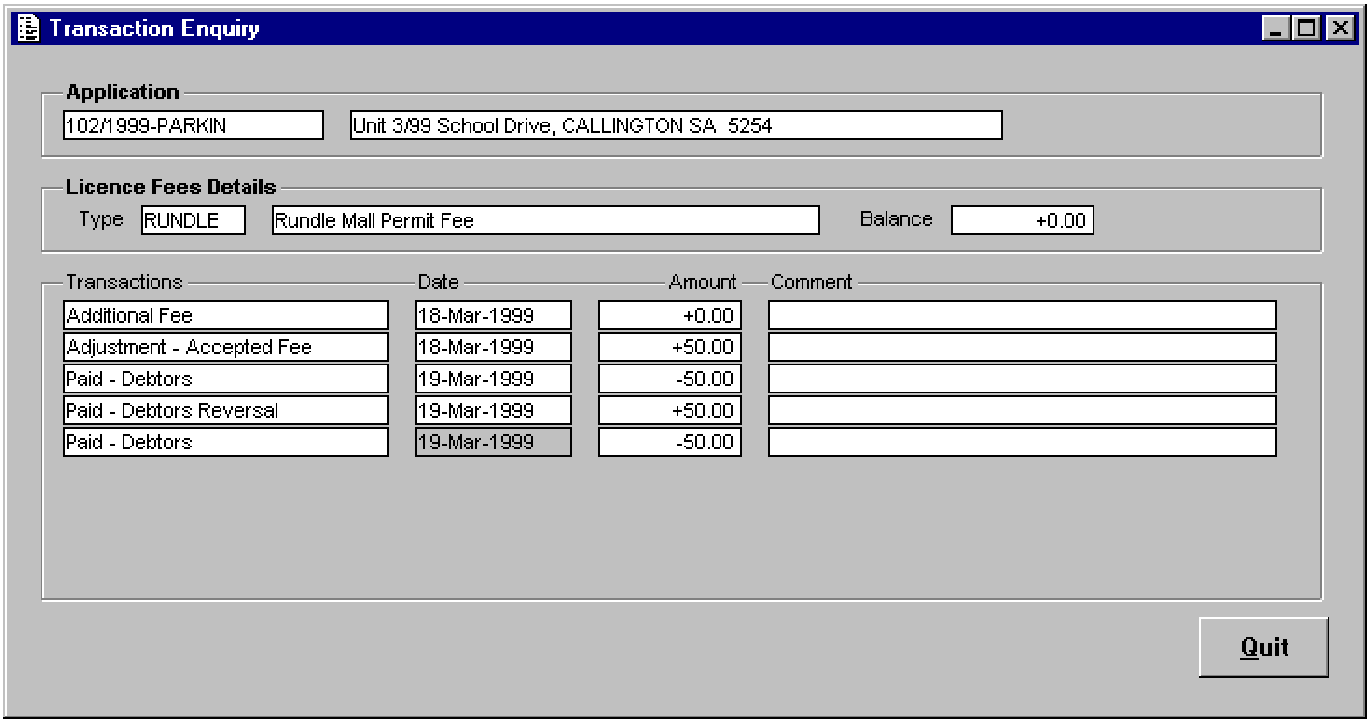
Options – Receipt Details
Selection of the Options Receipt Details Button will display Receipt Enquiry for the Prepayment Receipt.

Options - Refunds
Selection of the Options Refunds Button will display any Refunds that have been entered against the Prepayment, or allow entry of a Refund.

Transaction Enquiry Form

The Transaction Enquiry Form is displayed when the User has selected the Transactions Option Button from the Fees Maintenance form.

NOTE:- If the Fee Amount when entered had been changed from the Calculated amount then the Detail Button at the end of the Transaction Line will not be available. The Detail Button will only be available when the Accepted Amount is the same value as the Calculated Amount on the Fee.



Transaction Enquiry Form

Transaction Enquiry - Licence
This field details the current Licence number and Location of the Licence.

Licence Fee Details - Type
These two fields detail the Fee Type Code and its full description.

Balance
This field details the Balance of the Licence Fee

Transactions
This field details the Licence Fee by each Transaction.

Date
This field details the date of the Fee Transaction.

Amount
This field details the Amount of the Fee Transaction.

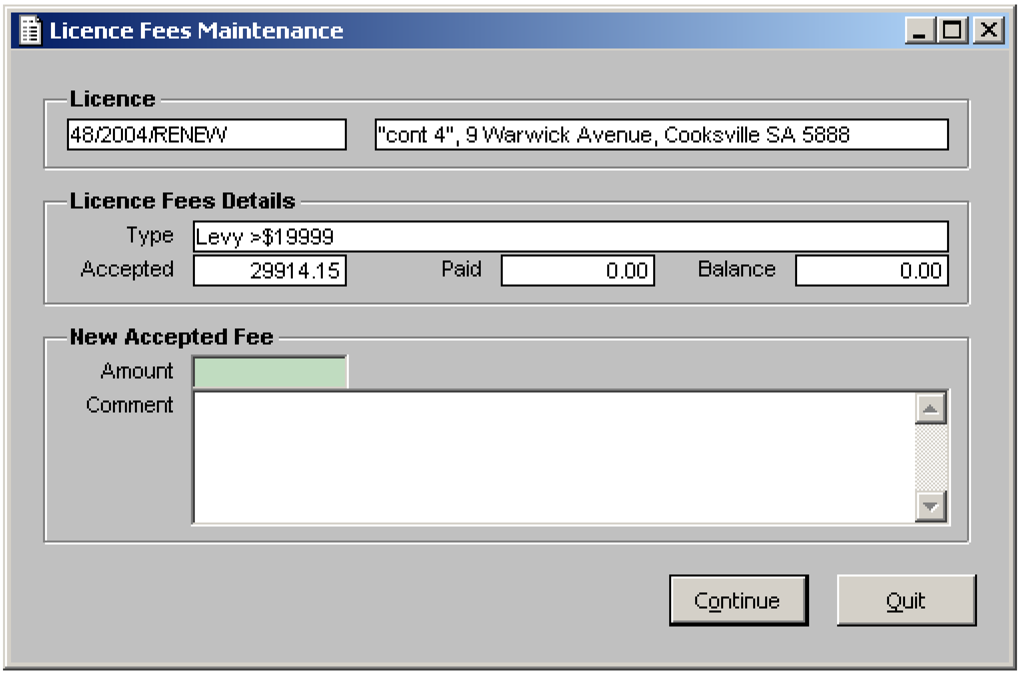
Comment
This fee details any comment that may have been put against the fee Transaction.

Comment field is mandatory if Mandatory Fee Adjustment Comment is checked on in the Class System parameters.

Licence Fees Maintenance/Adjustment Form

This form allows the User to make an adjustment to the particular fee selected.

NOTE: - When the Fee has been Transferred to Debtors then it is not possible to Increase the Fee Amount. The Adjustment can only be a Negative Adjustment. If the Fee is to be increased then it will need to be added as another fee entry to the Licence.



Fees Maintenance Form

Licence
The two fields detail the actual Licence selected and its Primary Location.

Type
This field details the Fee type selected and it's full description.

Accepted
This field details the actual dollar value that has been accepted for the fee.

Paid
This field details the dollar value paid against the fee.

Balance
This field details the dollar value of the balance of the fee.

New Accepted Fee - Amount
This field details the dollar value to be entered to adjust to the new Accepted Fee.

Where the Fee has been transferred to Debtors the Adjustment will create a Credit Note when the Debtor Txn Generation process is run.

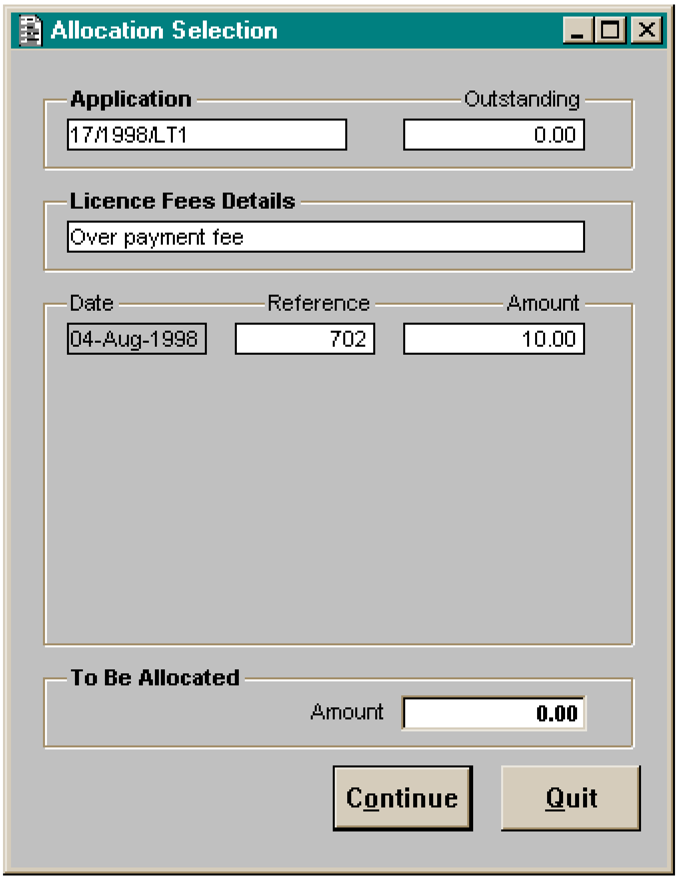
NOTE: - When the Fee has been Transferred to Debtors then it is not possible to Increase the Fee Amount. The Adjustment can only be a Negative Adjustment. If the Fee is to be increased then it will need to be added as another fee entry to the Licence.

Comment
This field allows the User to enter a comment regarding the fee being adjusted. This is a free text field.

Comment field is mandatory if Mandatory Fee Adjustment Comment is checked on in the Class System parameters.

Allocation Selection Form

This form allows the User to select an Allocation to be applied to a fee.



Allocation Selection Form

Licence
This field details the current Licence.

Outstanding
This field details the Outstanding amount of the Fee.

Licence Fee Details
This field details the actual name of the field being modified.

Date
This field details the date of the Allocation.

Reference
This field details the Reference Number assigned to the Allocation.

Amount
This field details the dollar value assigned to the Allocation.

To Be Allocated
This field details the amount to be allocated.

Exempt Button
This button when clicked will Exempt the fee that has been highlighted. The Exempt Status will be shown in the Status Field.

Not Applicable Button
This button when clicked will assign a Not Applicable Status to the fee that has been highlighted. The Not Applicable Status will be show in the Status Field

Reset Button
This button when clicked will Reset the fee that has been highlighted. The Status will then be cleared.

Paid Button
This button when clicked will mark the fee that has been highlighted as Paid. The Status will be shown in the Status Field as Paid.

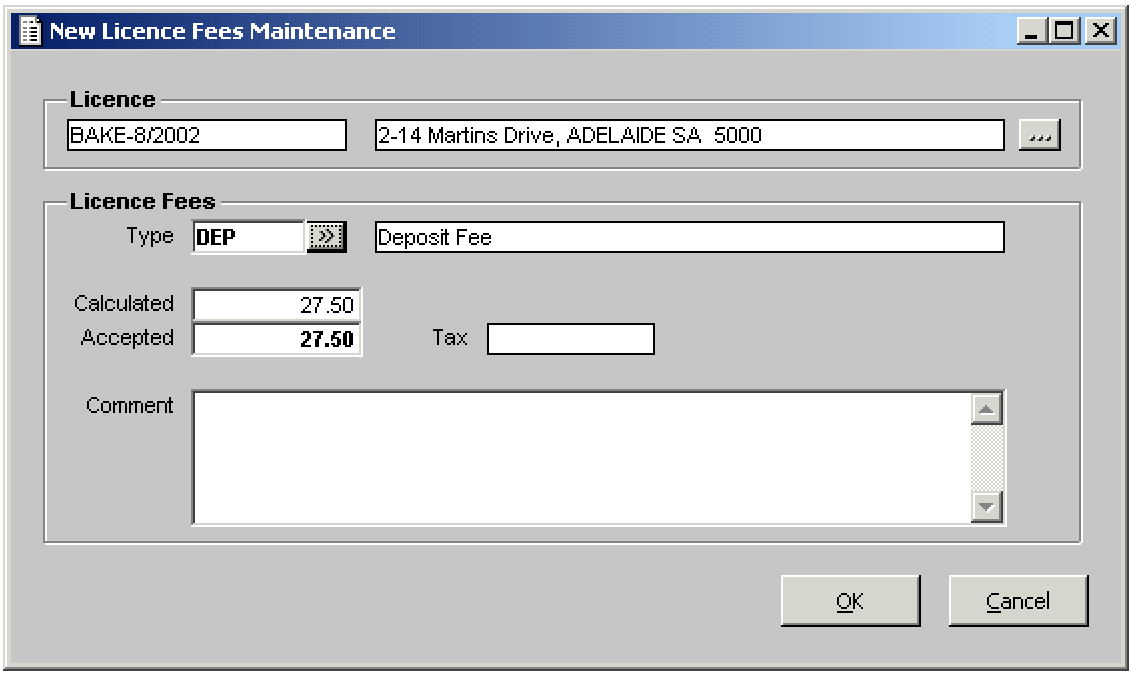
Reset Button
This button when clicked will Reset the fee that has been highlighted. The Status will then be cleared.

Kept Button
This button when clicked will ensure the fee that has been highlighted is Kept. The Status will then be shown as Kept.

Reset Button
This button when clicked will Reset the fee that has been highlighted. The Status will then be cleared.

New Licence Fee Maintenance Form

The New Licence Fee Maintenance Form may be accessed by clicking on the Insert Button from the Licence Fee Maintenance Form or using the Multi-Maintenance Option from a Selection Form. The Form consists of the following fields.



New Licence Fees Maintenance Form

Licence
These two fields detail the number of the Licence and its Primary Location. A Detail Button is displayed when the Multi-Maintenance Function has been used. This allows the User to detail out and display the Licences that will be updated with the Fees Maintenance Function.

Licence Fee Details - Type
This field enable User to enter a Licence Type if known, or click on the Pop Up Button to select from pre-defined Fee Codes.

Calculated
This field details the dollar value that has been calculated against the fee.

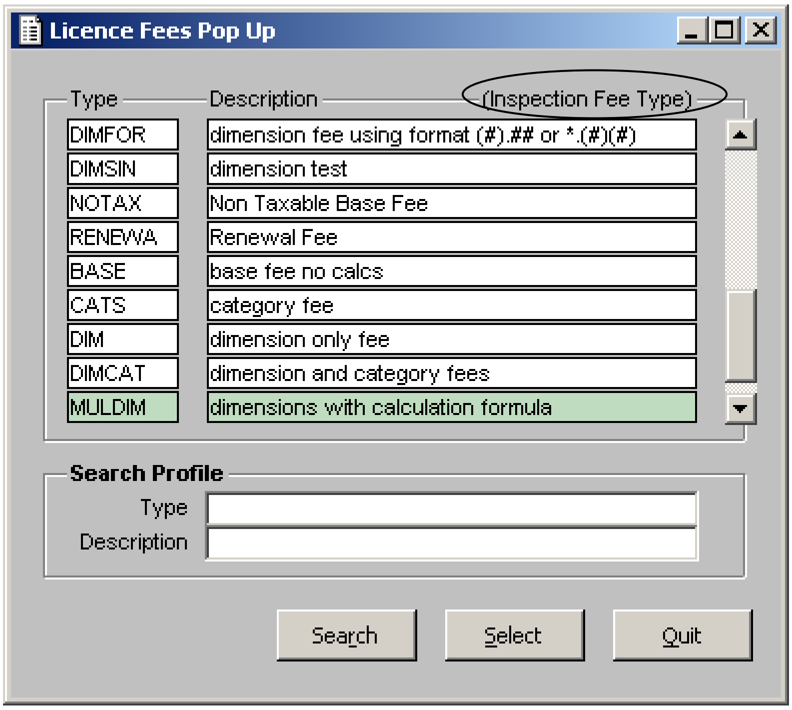
Accepted
This field allows the User to modify the Calculated Fee to that of a fee that the Council is willing to accept against this particular fee.

Tax
This field displays the Tax value that has been calculated against the fee if the fee is taxable.

Comment
This field is free format and allows the User to enter a comment on the particular fee that is being added.

Licence Fees Pop Up Form

The Licence Fee Pop Up Form allows the User to see the list of predefined Fees. Depending on where the Pop Up form is selected will depend on the Fees that are shown to the User for Selection. As the User places focus on the Fees in the Display so the description of the Type of Fee it is will display on the Top Right Hand Side of the Form. For example Consent Fees will only appear in the Fee Pop Up form if there are Consents on the License.



Licence Fees Pop Up Form

Type
This field displays the Code that has been assigned to the Fee Type.

Description
This field gives a detailed description of the Licence Fee Type.

Search Profile - Type
This field allows the User to enter an Licence Fee and click the Search button to begin a Search on entered Criteria.

Search Profile - Description
This field allows the User to enter a Description, click on the Search button to being a Search on the entered Criteria.

Name Maintenance Form

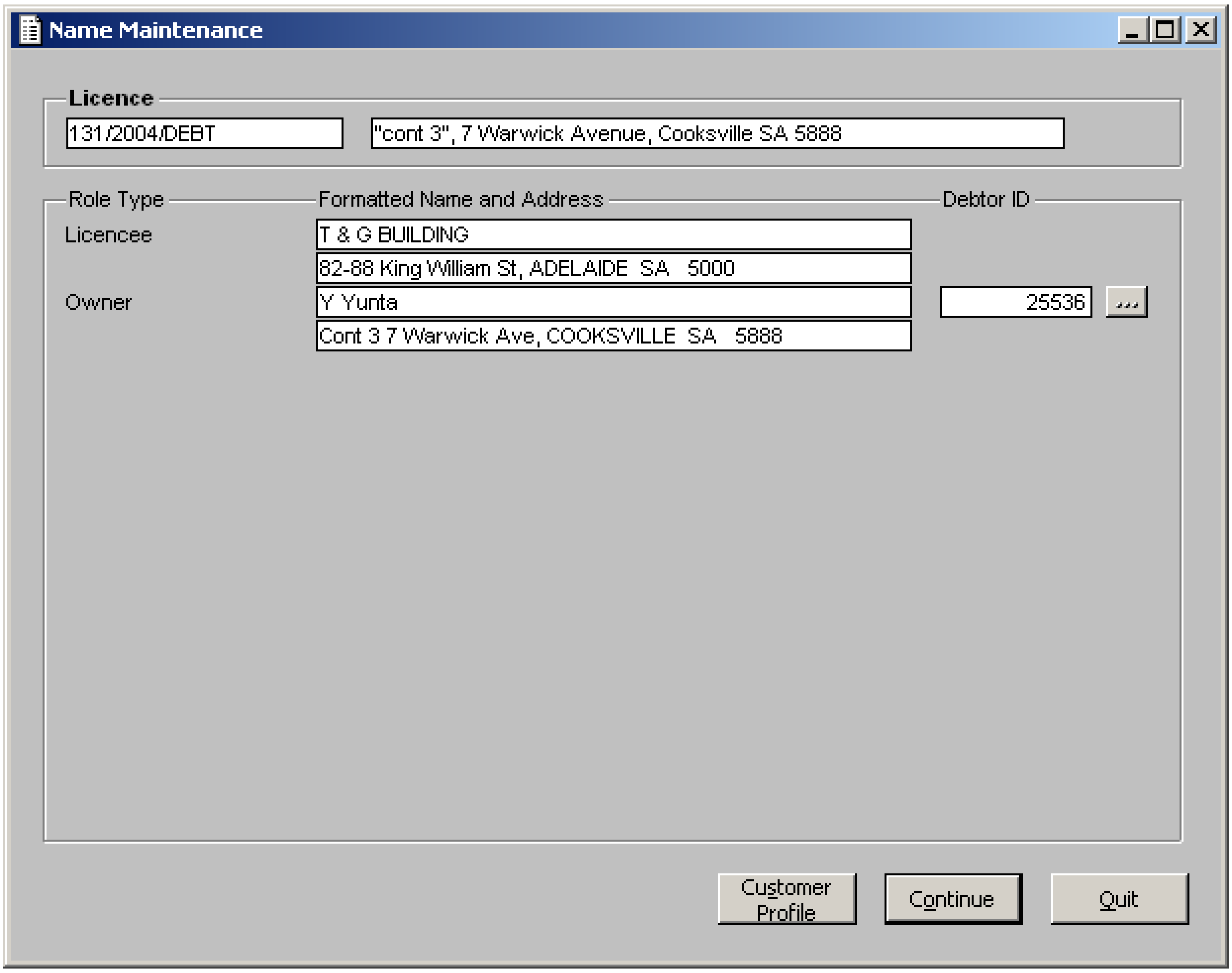
The Name Maintenance Form is displayed under the following circumstances

- when the Debtor Txn Generation Button has been selected from the Fee Maintenance Form and the Licence is for a Debtor

- when the Invoice Print Button has been selected from the Fee Maintenance Form and the Licence is not linked to Debtors.

Debtor Txn Generation Button
When selected via the above option then the Names Maintenance form allows for the selection of the Debtor that the transaction is to be applied to. Additionally the User is also able to maintain the Customer Profile information for the Role Type. This Role Type is then used as the Document Addressee when an Invoice is printed.

Invoice Print Button
When selected via the Invoice Print Button then the Names Maintenance form allows for the selection of the Name Role that is to be used as the Document Addressee for the Printing of the Invoice.

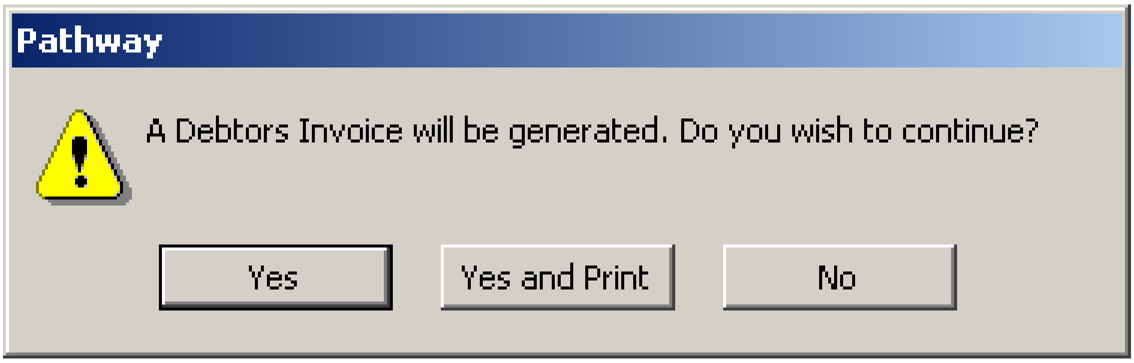


Name Maintenance Form

<u>*Linked to Debtors*</u>
The following validation is performed when the Continue Button is selected on this form:-

- Validate that a 'valid' Debtor exists linked to the selected Name. (valid infers that it has not been suspended)
- Validate that a Debt Type is linked to the relevant Fees that are being processed.

If the above validation is correct and the Account Method is Pathway Debtors, a Message appears and the User is required to answer it.



If the User replies 'Yes' then the Transaction only is generated into the Debtors Module.

If the User replies 'Yes and Print' then the Transaction is generated into the Debtors Module and also the Document Print form is displayed to allow the printing of the Invoice.

If the User replies 'No' then they are returned to the Fee Maintenance Form and no transactions are generated in Debtors.

Upon answering either 'Yes' or 'Yes and Print' the following process occurs:-

- An Invoice Number is allocated (from the next sequential invoice number parameter in Licensing when Accounting Method is NOT Pathway Debtors)
- A Debtors Batch Invoice is generated (multi lined if multi Fees are being transferred) using the linked Debtor and the Debt Type linked to each Fee Code and the System Parameter Transaction Type for Invoice
- The Licence Number will be passed and displayed in the External Source field.
- The Module Code of LLC will be passed and displayed in the External Reference field.
- The Payment Reference (the TPK of the Licence) will be passed and displayed in the Payment Reference field.
- The TPK of the Licence and the Fee Description will be passed and displayed in the Transaction Ref. field separated by a semi colon.
- The Amount of the Fee (Gross) is passed and Debtors calculate the Tax component where the Debt Type is Taxable.
- The Batch passed is processed and updated immediately making the Transactions available for viewing within the Debtor Maintenance menu straight away.

Once Debtors has finished processing the above information it returns back to Licensing the following:-

- The Debtor generated Invoice Number is returned and displayed in the Reference Field on the Transaction Maintenance Form
- The Invoiced field is updated with an 'I' to indicate that the transaction has been invoiced to Debtors
- The Fee Status is set to 'Transferred to Debtors' for Pathway Debtors only.

Licence

These two fields detail the number of the current Licence and its Primary Location.

Role Type

The Role Type of the Name is shown next to the Name. This informs the User of the Role Type the Name has within the Licence.

Formatted Name and Address

The Formatted Name and Address of the Name is displayed in this field.

Debtor Id

The Debtor Id that is associated to the Name Role Record is shown in this field. If this field is blank then no Debtor Id has been linked to the Name Role Record. If the Name Record with the blank Debtor Id field is to be used for the Debtor update then the Customer Profile Button will need to be selected and the link to Debtors created for the Name Role.

If the form has been selected via the Print Invoice Option Button then the Debtor Id is not shown.

Debtor Enquiry
The Debtor Id field is only displayed when the Licensing Class has been defined as using Pathway Debtors as one of the Accounting Methods. In conjunction with the Debtor Id field it is possible to detail out to the Debtor Enquiry menu for the Debtor Id using this option. The Detail Option is controlled by User Security within the Licensing Class and therefore access to this function needs to be given to the User to enable the display and selection of this Detail Option.

Customer Profile Button
The Customer Profile Button is displayed to allow the maintenance of the Debtor link for the Name Records displayed on the form. Selecting this Button will allow the User to update or create the Debtor link for the Name Record currently in focus.

If the form has been selecdted via the Print Invoice Option Button then the Customer Profile Button is not shown.

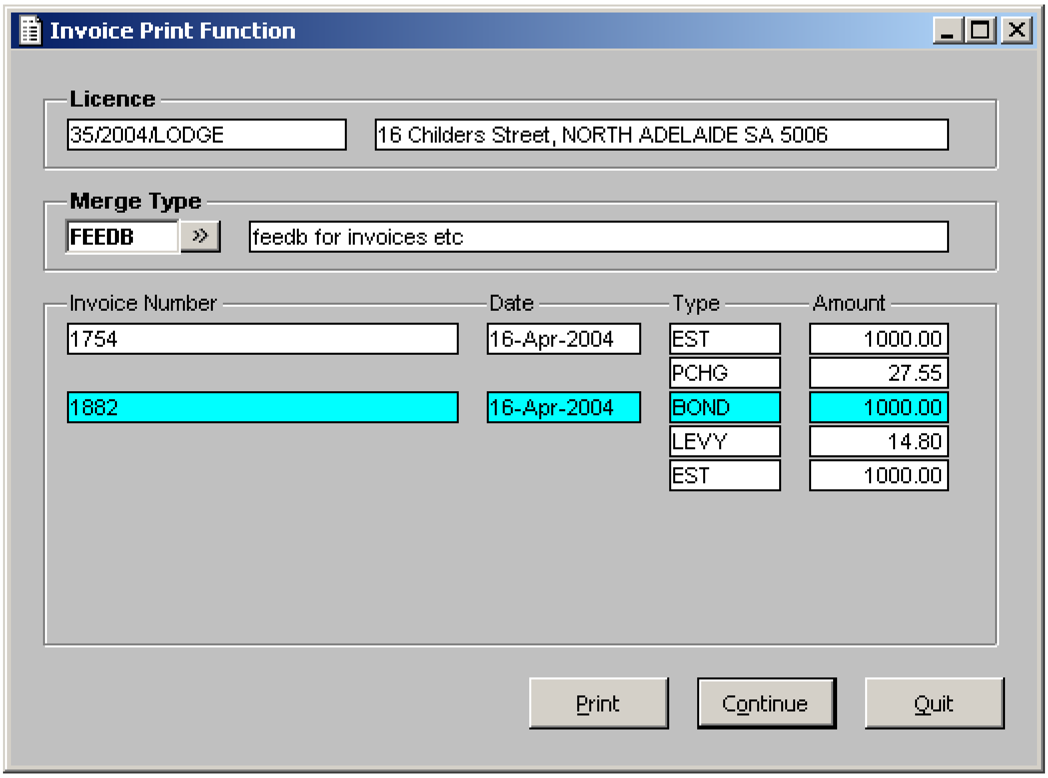
Invoice Print Function Form

The Invoice Print Function Form is displayed when the Invoice Print Button has been selected from the Fee Maintenance form or the User has nominated to Print the Invoice during the Debtor Txn Generation Process.

The Merge Type to be used within this form is to be defined within the Class Parameters using the Extract and Merge options. If Pathway Debtors is being used for the Accounting Method then the extract FEEDB can be used when setting up the Merge Type for this function.

When an Invoice is printed then it can be accessed via the Letters option on the Licence. The Debtor will be used as the Document Addressee or if not a Debtors Licence the name that had been selected at the time the request to print the Invoice was done will be shown.

NOTE : - The Invoice will not shown using the Letter option against the Name Role record within the Names Maintenance form within the Licence. The Invoice is only available via the Letter Option.



Invoice Print Function Form

Licence

These two fields detail the number of the current Licence and its Primary Location.

Merge Type

The Merge Type to be used for the printing of the Invoice / Credit Note needs to be entered into this field. If the Merge Type is not known then the Pop Up can be used to display a list of valid Merge Types that can be used.

Invoice Number
The Invoice Number associated to the Fee is displayed in this field.

Date
The Date of the Fee Transaction is displayed in this field.

Type
The Fee Code is displayed in this field. This also is the Debt Type within the Pathway Debtor Module.

Amount
The Amount of the Fee is displayed in this field. This Amount represents the amount that has been processed for the Fee for the Invoice.

Print
The Print Option is selected to produce the actual Invoice / Credit Note.

Lodgement Fees Maintenance Form

The Lodgement Fees Maintenance Form is displayed when the Load Lodgement Fees Options has been taken from the Fees Maintenance form.

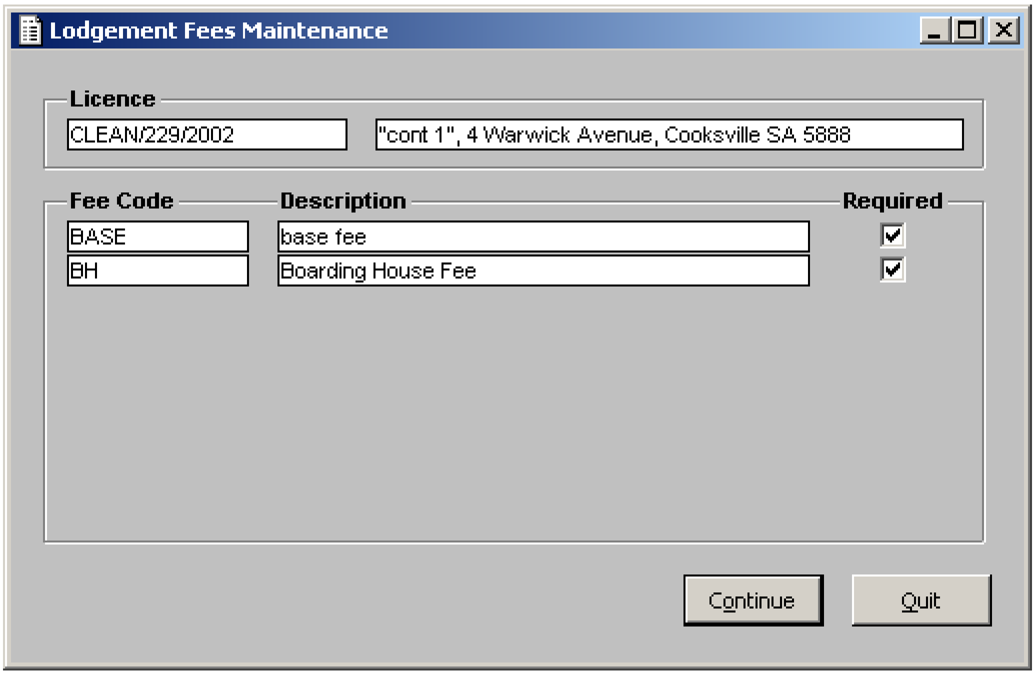
The Lodgement Fees Maintenance form can be used to load all Fees assigned in a Lodgement Option.

When this option is used, all Fees that are assigned to the Licence Type are collected and displayed in a selection window. Each of the fees has a check box next to it and users are able to check OFF any that they feel are not required.

When the OK button is then selected all fees that are still checked ON will be added to the Licence.

Where the selected fees require Dimensions or Categories for calculation the relevant screens are displayed for values to be entered.

The insertion of other fees can still be handled via the Insert Button.



Lodgement Fees Maintenance Form

Licence
These two fields detail the number of the current Licence and its Location.

Fee Code
The Fee Code that has been defined as being loaded at Lodgement is displayed in this field.

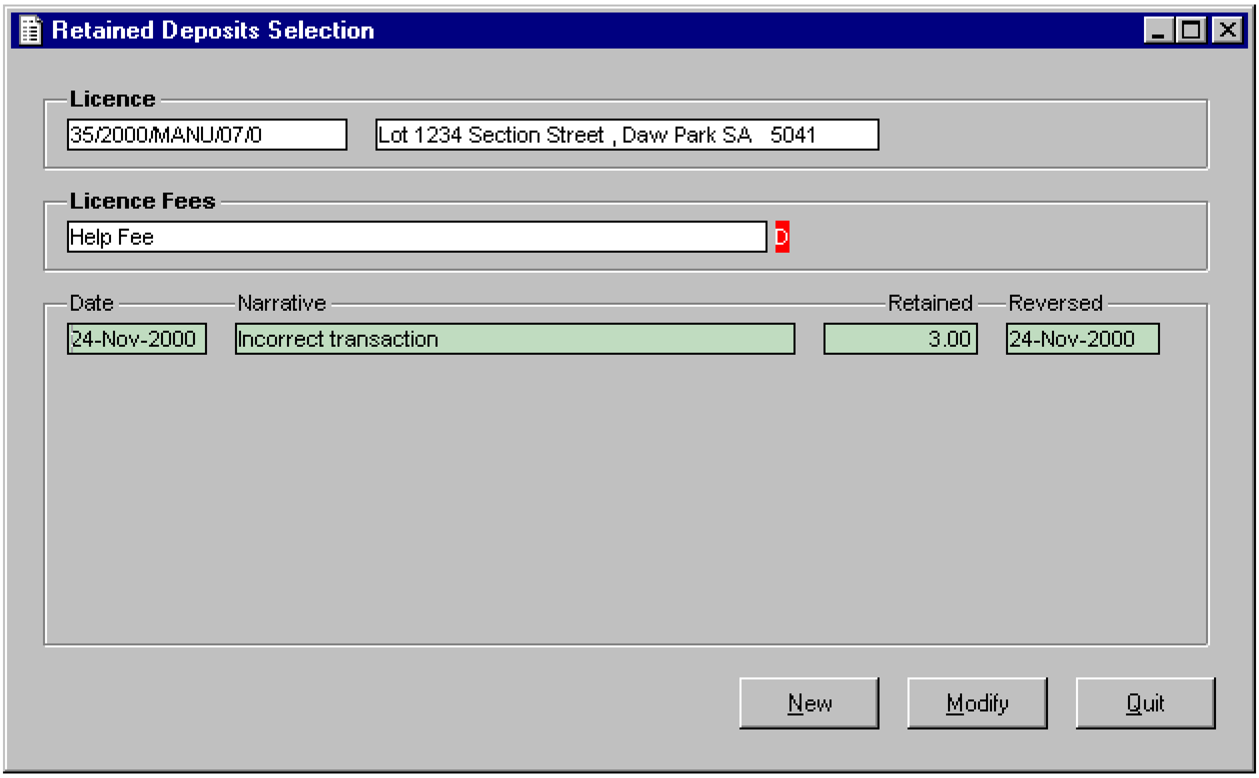
Description
The Fee Description that has been defined as being loaded at Lodgement is displayed in this field.

Required
The Required field allows the User to determine the Fee is required to be loaded or not. This field is defaulted to ON but can be flagged Off by the User if the Fee is not required to be loaded onto the Licence.

Deposits Retained

Retained Deposits Selection Form

The Retained Deposits Selection Form displays a list of existing Retained/Reversed Deposits with the option to add a new Retained record or display/modify an existing record.



Retained Deposits Selection Form

Licence
These fields display the number of the current Licence and its Primary Location.

Licence Fee
This field displays the Deposit Fee description

Date
This field displays the date the Retained record was created.

Narrative
Any additional comments required on the Deposit Retained can be entered in this field. The field is unlimited in size and is optional.

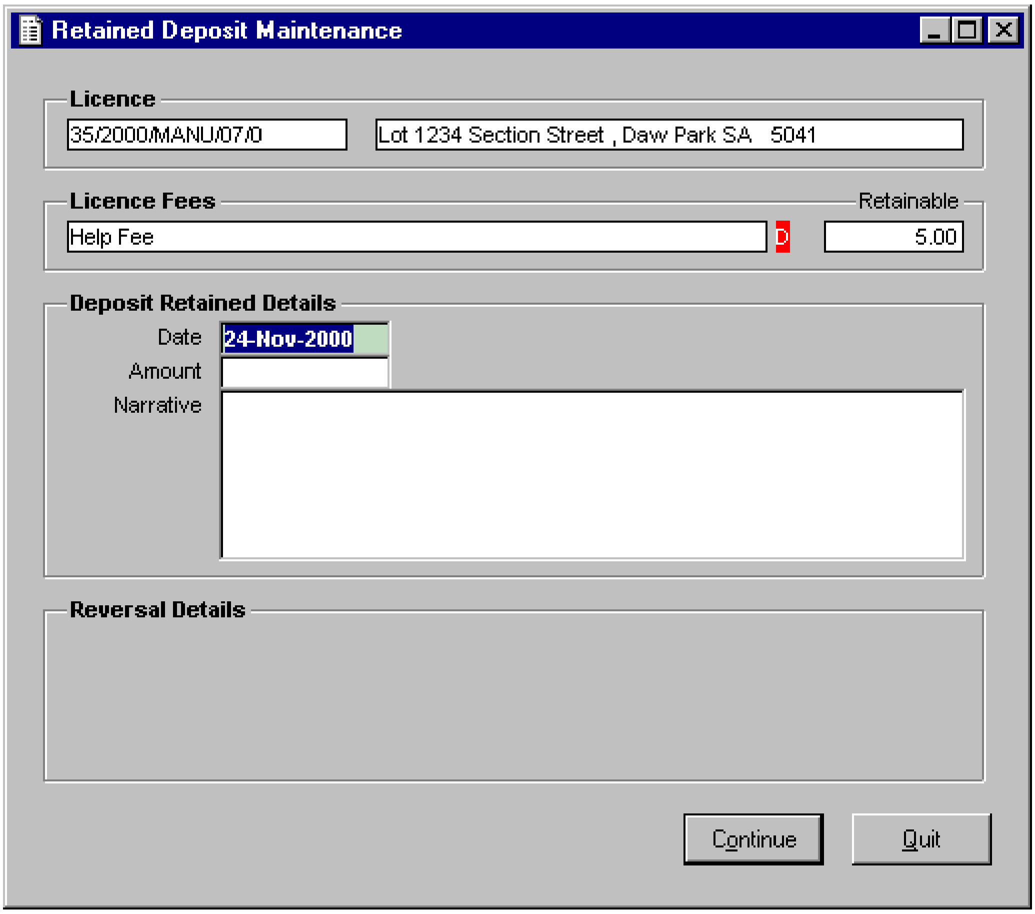
Retained
This field displays the amount retained.

Reversed
This field displays the date that the Retained record was reversed.

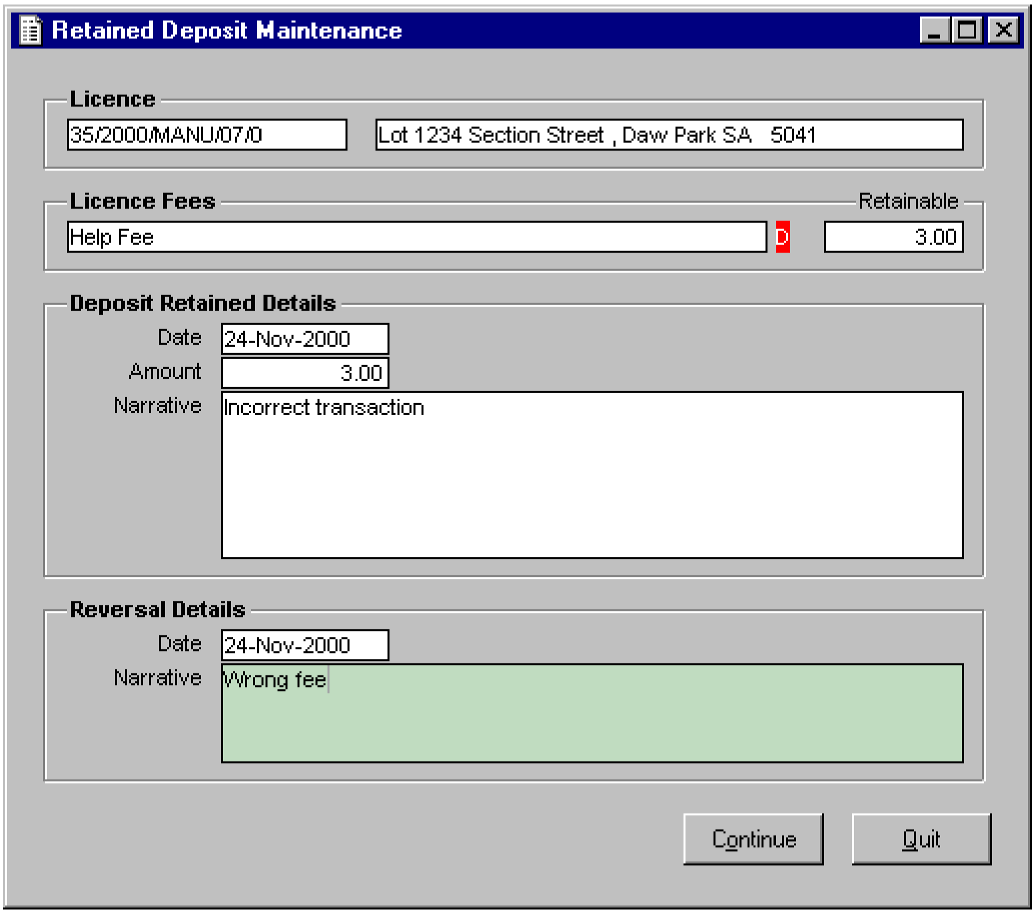
Retained Deposit Maintenance Form

The Retained Deposit Maintenance Form enables Council to retain the monies received for the Deposit. The funds are transferred from the Deposit Account, which can be a Trust type account in some situations, and placed in general funds.

The Deposit Amount will default into the Retainable field, however it can be reduced by keying this reduced amount if the amount field, where only a partial Deposit amount is to be retained.



Retained Deposit Maintenance Form



Retained Deposit Maintenance Form with Reversal

Licence

These fields display the number of the current Licence and its Primary Location.

Licence Fee

This field displays the Deposit Fee description.

Retainable

This field displays the amount of the fee that is available to be retained.

Deposit Retained Details – Date

This field displays the date that the Deposit Retained record was created.

Deposit Retained Details – Amount

Enter the Amount of the fee that is to be Retained. This amount can be less than but not greater than the amount Retained.

Deposit Retained Details – Narrative

Any additional comments required on the Deposit Retained can be entered in this field. The field is unlimited in size and is optional.

Reversal Details – Date and Narrative

These fields are displayed once a Retained Deposit record has been reversed. The date and narrative of the reversal are displayed once a record has been created. If the record was maintained by the User the Reverse Button will not be displayed.

Refunds

The Refunds Function is designed to allow the User to Refund Licence Fees and/or Deposit Fees receipted to a Licence.

The Refunds Option is selected from within the actual Licence.

The first form presented is the Fess Refund Selection form allowing the User to create a new Refund or Select a previously created Refund for Modification.

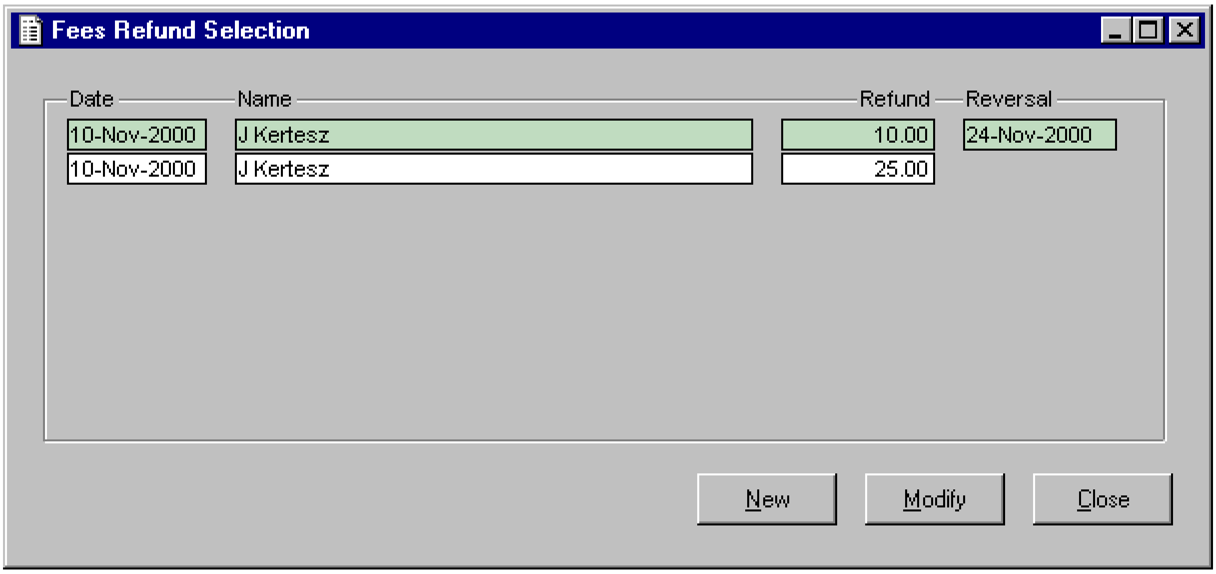
Selecting the New Button on the Selection form presents the User with the Fees Refund Maintenance form.

Refunds are always relative to a Receipt or Receipts, as opposed to Fees. However the operator will be shown the Fees that will be affected by the Refund or the Receipt.

The Process is as follows:

- Select a Receipt(s)
- Allocate the Refund to the Fees for the selected Receipts
- Select the Name of the Payee based on the Receipt Name
- Add the other Refund data

Fees Refund Selection Form



Fees Refund Selection Form

Date
This field displays the Date the Refund was created.

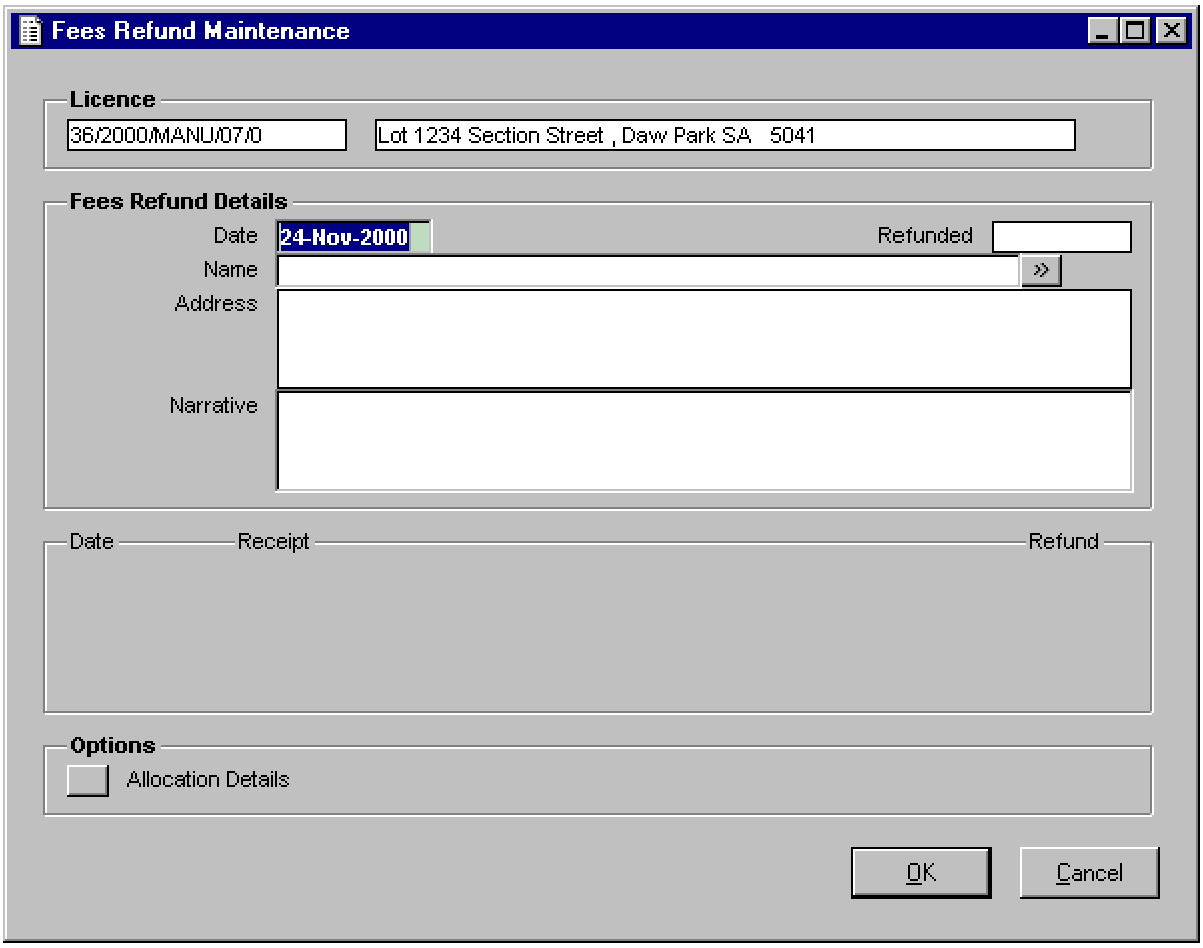
Name
This field displays the Name the Refund was created for.

Amount
This field displays the Amount of the Refund

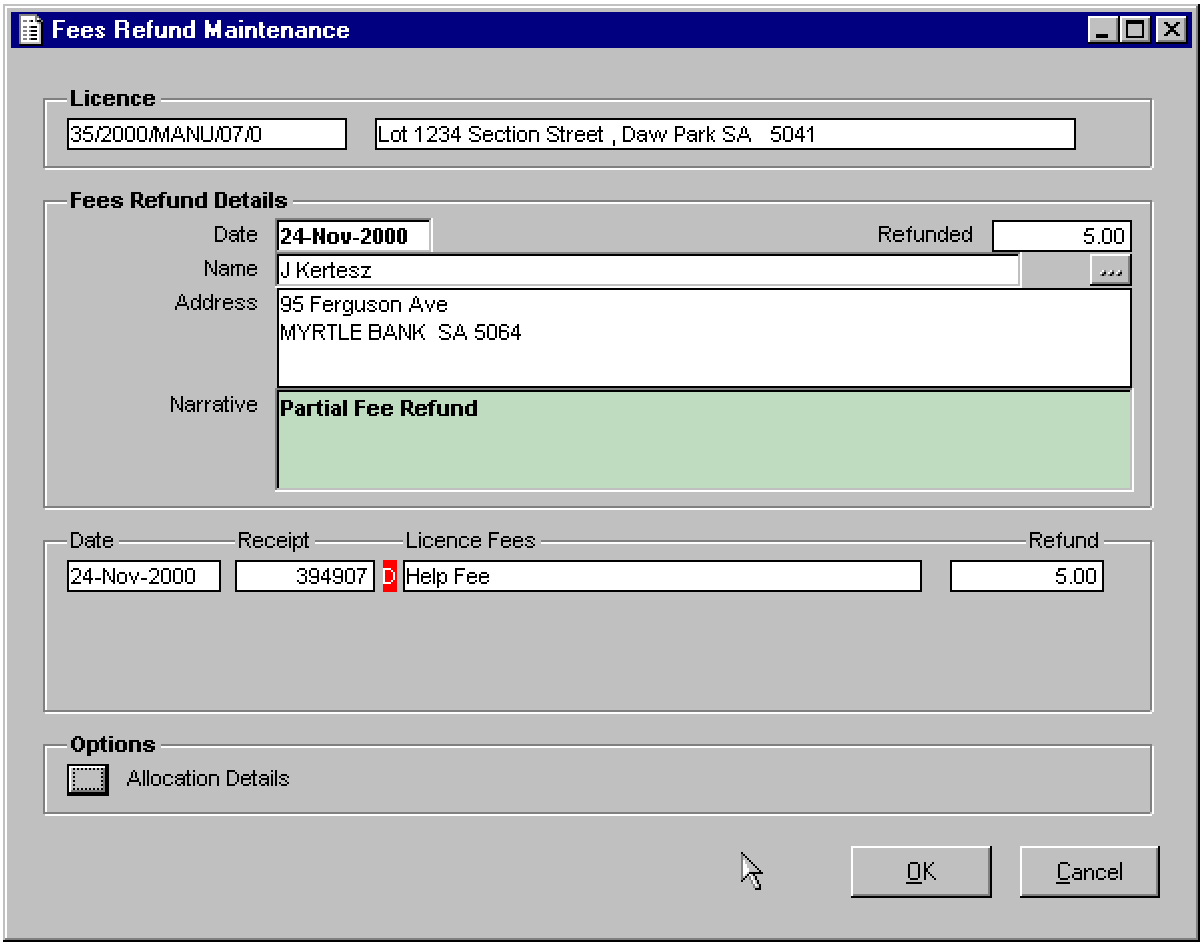
Reversal
This field displays the Date the Refund was Reversed.

Fees Refund Maintenance Form

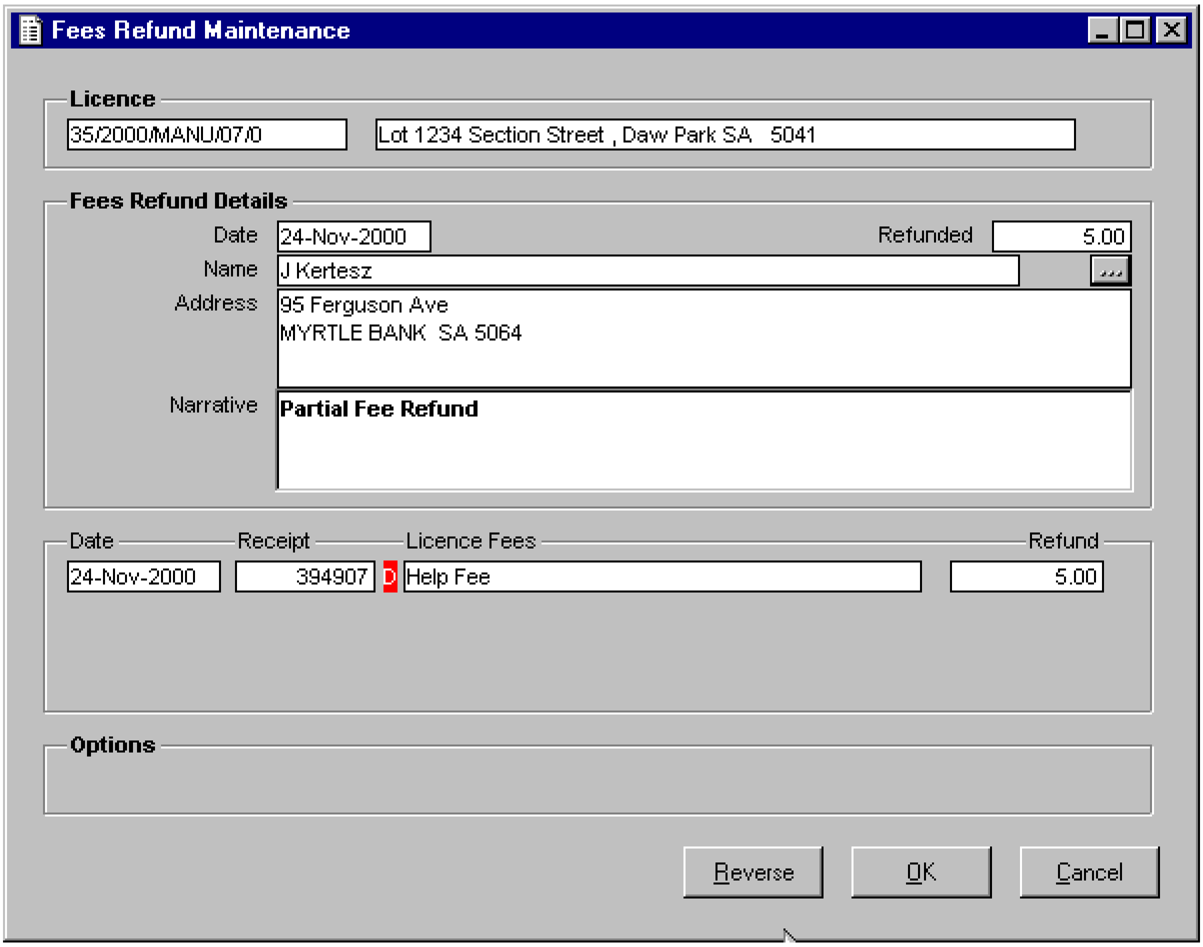
The Fees Refund Maintenance Form can be accessed by selection the Options menu or clicking on the Options Button from the Licence Summary Form. The Form consists of the following fields.



Fees Refund Maintenance Form



Fees Refund Maintenance Form after Refund



Fees Refund Maintenance Form with Reverse Button

Licence
These fields detail the number of the current Licence and its Primary Location.

Date
This field displays the date of the Refund and will default to the System Date but can be overridden. This field is mandatory.

Refunded
This field displays the amount of the Refund once it has been allocated on the Refunds Receipt Selection Form. This field cannot be maintained and is display only.

Name

Upon entry into a new Refund the Name field will default to that of the first Applicant. If this name is not correct then the User can use the Pop Up button to commence a search over the Name and Address system or create a new Name.

Address
This field displays the Address for the selected name and cannot be maintained.

Narrative
Any additional comments required on the Refund can be entered in this field. The field is unlimited in size and is optional.

Date
This field displays the Date of the Receipt and cannot be maintained.

Receipt
This field displays the Receipt Number and cannot be maintained.

Licence Fees

This field displays the Fee Refunded and cannot be maintained.

Refund
This field displays the Amount of the Receipt available for Refund. This field cannot be maintained.

Options - Allocation Details
Selection of this button displays the Refunds Receipt Selection Form.

Reverse
The Reverse function enables a Refund that has previously been accepted, to be totally reversed. This will cause the following to occur:
Any Fee affected by the Refund to be re-instated with 'paid' details as before the Refund
An Overpayment that was Refunded will be re-instated as before the Refund
The Receipt Refund Amount or Deposit Refund Amount will be reduced accordingly
The Status on a Deposit Fee will be reset
Transactions will show original Refund and Refund Reversal to retain history
Ledger entries will be generated for the Refund Reversal and re-allocation of the Receipt

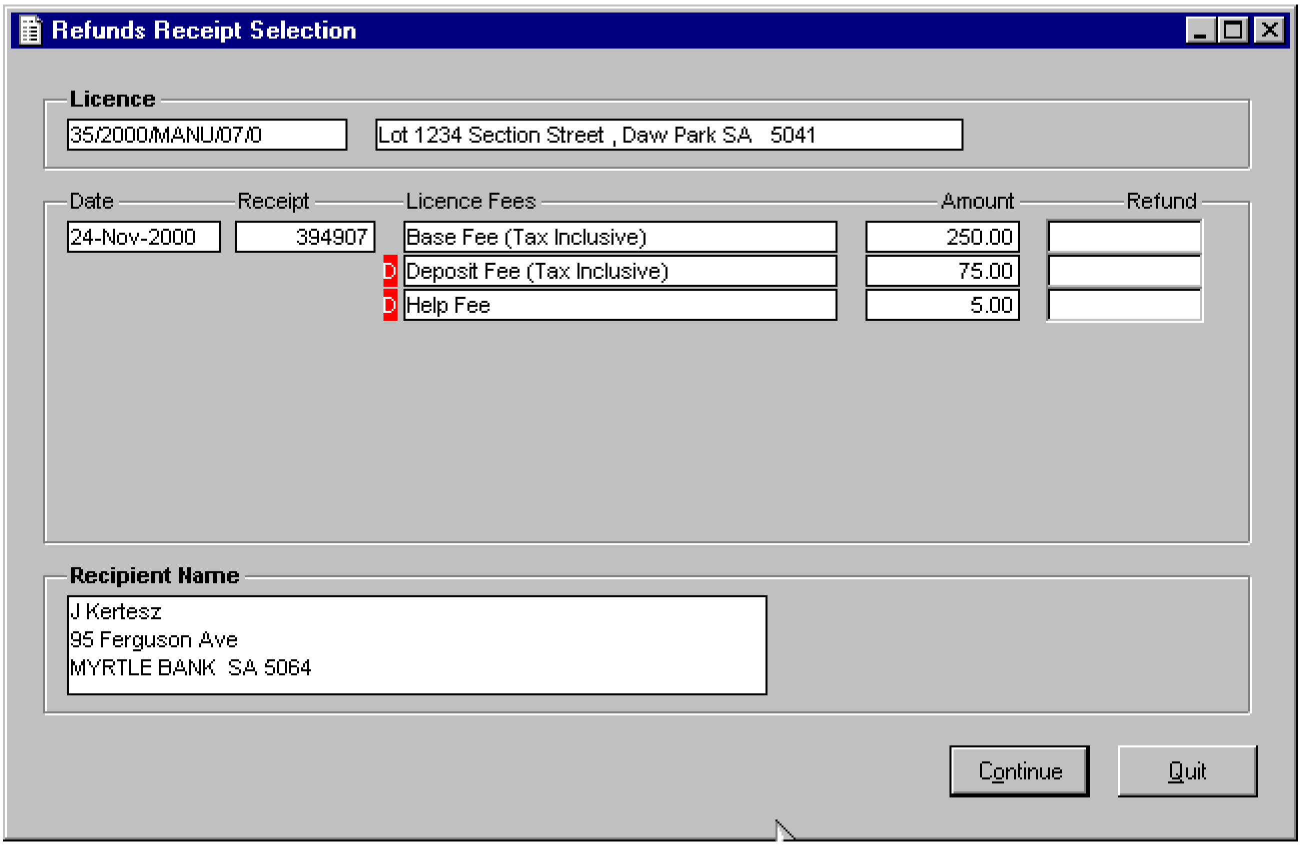
Debit	Refund Clearing Account
Credit	System Bank Account
Debit	Fee or Pre-Payment/Overpayments Bank Account
Credit	Fee Revenue or Pre-Payments/Overpayment Account

The processing of a Reversal will require 'Additional Narrative' i.e. Reason for the Reversal.

The Reverse Button is hidden once a Refund has been reverse.

Note: Reversal or Refund will reverse the Ledger entries as above, however, if a Cheque has been drawn, it is the responsibility of the Finance Department to manage the cancellation of the cheque.

Refunds Receipt Selection Form



Refunds Receipt Selection Form

Application
These fields detail the number of the current Licence and its Primary Location.

Date
This field displays the date of the Refund. This field cannot be maintained.

Receipt
This field displays the Receipt Number. This field cannot be maintained.

Application Fee
This field displays the Fee Description. This field cannot be maintained.

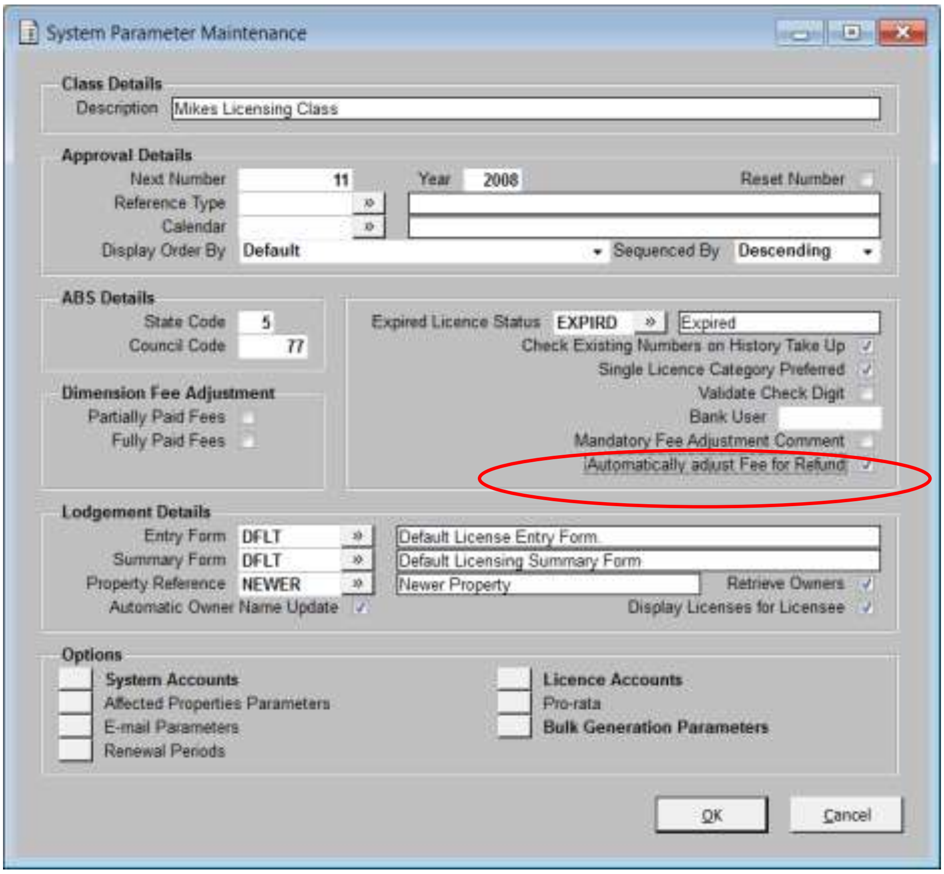
Amount
This field displays the balance available for refund. This field cannot be maintained.

Refund
Enter the amount of refund required.

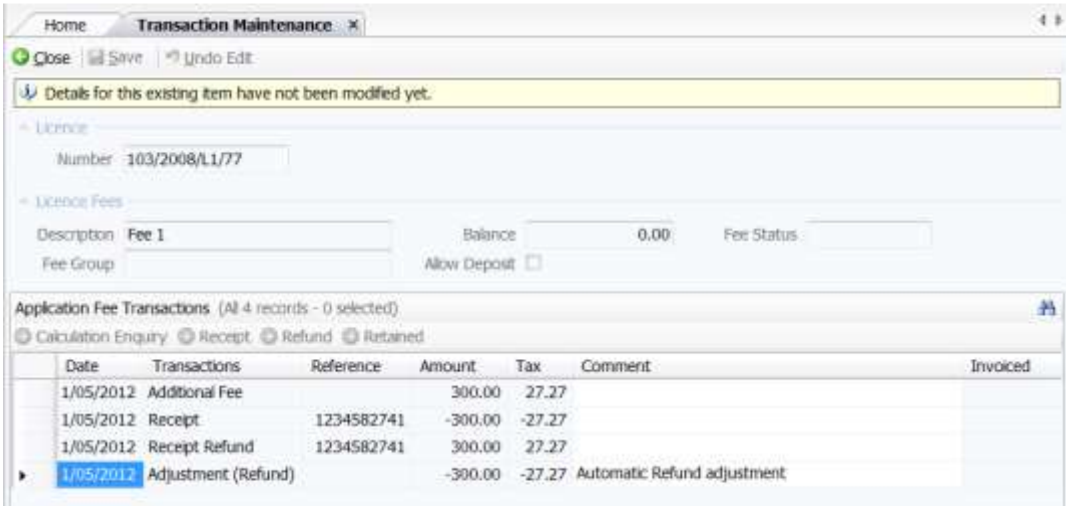
Recipient Name
This field displays the Recipients Name and Address details. This field cannot be maintained.

Automatically Adjust Fee for Refund
Functionality has been provided that allows a Fee adjustment transaction to be automatically created when a Refund is entered for a Fee. This ability means that users will no longer have to manually adjust a Fee after having entered a Refund for that Fee. This functionality is available in the Smart Client and the Thick Client for when refunds are entered via Licensing Maintenance (via the Fees Refund option) or the Refunds module (Refunds >> Refund Transaction Entry).

The new ‘Automatically adjust Fee for Refund’ parameter has been provided in the Class System Parameter Maintenance form (access from Licensing >> Licensing Parameters and select the System Parameter option for the Class).



When this parameter is checked and a Refund is entered for a Licence Fee it will result in an Adjustment (Refund) transaction being created reflecting the amount of the refund. The following is an example on how the transactions appear after having performed a refund in full:



Date	Transactions	Reference	Amount	Tax	Comment	Invoiced
1/05/2012	Additional Fee		300.00	27.27		
1/05/2012	Receipt	1234582741	-300.00	-27.27		
1/05/2012	Receipt Refund	1234582741	300.00	27.27		
1/05/2012	Adjustment (Refund)		-300.00	-27.27	Automatic Refund adjustment	

If the parameter is not checked on entering a refund will result in the fee being left outstanding (original behaviour).

Letters

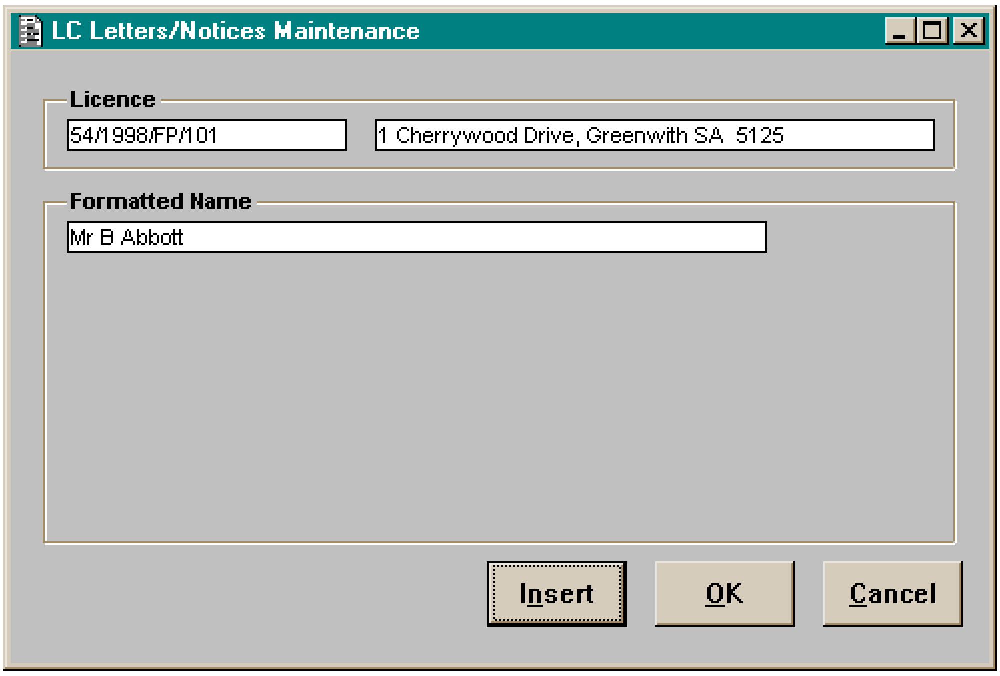
The Letters Function is designed to allow the User with the aid of the Word Processing Module, select and send Letters to any Role Type associated with the Licence.

Letters are originally created as part of the Parameter Setup, and may be selected as an Option within the actual Licence.

The first form present is a Search Profile form allowing the User to create a new Letter of the Licence, or Select a previously created Letter for Modification.

Selecting the New Button on the Search Profile presents the User with the Letters Maintenance Form. This consists of the following fields:

Letters/Notices Maintenance Form



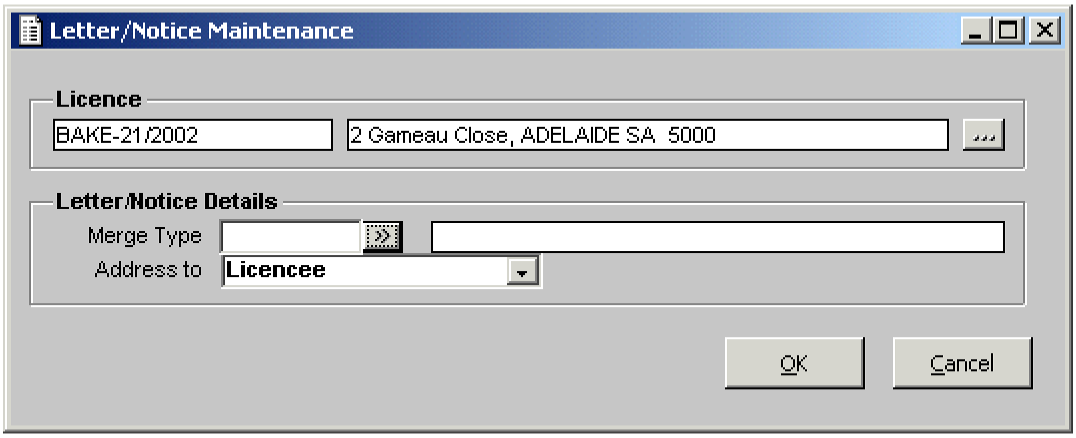
Licence Letters/Notices Maintenance Form

Licence
These two fields detail the actual Licence Number and the description of its Location.

Formatted name
This field details the name of the person who will receive the selected letter. A Name may be entered into this field, by selecting the Insert Button. The User will be presented with the Name Selection Form to either select an existing name, or insert a new name.
More than one name may be sent a letter by selecting the Insert Button and repeating the previous steps. Once the Names required are selected. Press the OK button. A Document Request Screen will be presented. The User may then select a Merge Type to produce the required Letters.

These forms are Word Processing form and the Selection and Maintenance of these forms is detailed in the Word Processing Manuals.

Letter/Notice Maintenance Form – Multi-Maintenance Option



Letter/Notice Maintenance Form - Multi-Maintenance Option

Licence

These two fields detail the Licence Number and its Location. A Detail Button is available to allow the User to display the Licences that have been selected to be updated by the Letter/Notice function.

Letter/Notice Details - Merge Type

Enter the Merge Type that is required to be generated. If the Merge Type is not known then the Pop Up can be used to display the available Merge Types.

Letter/Notice Details – Address To

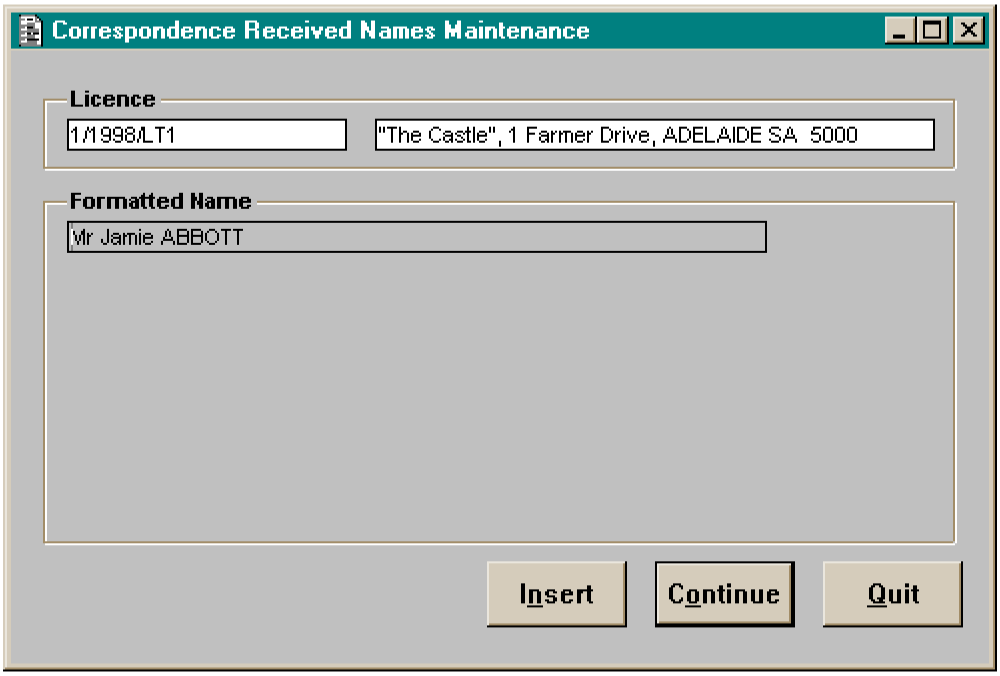
The Address To field defaults to the Licencee. However if the Letter/Notice is to be sent to someone other than the Licencee, then the dropdown can be used to select the relevant Addressee.

Correspondence Received

The Correspondence Received Option allows Users to enter specific information that has been received by the organisation and requires records to be kept. Correspondence Types may be any Type the User may wish to add, but would general be such things as Faxes, E-mail, Letters etc.

The User will firstly be presented with a Correspondence Received Names Maintenance Form. This form consists of the following fields:

Correspondence Received Names Maintenance Form



Correspondence Received Names Maintenance Form

Licence
These fields detail the actual Licence currently selected and its detailed Location.

Formatted Name
This field is used to display the name that is selected to assign the Correspondence Types to.
The User must select the Insert Key to be presented with the Name selection form. Once a name is selected, this field will be populated with the name. If more than one name is required, select the Insert Key again and select a further name.

Once the Name(s) have been selected, press the Continue key to be presented with the Correspondence Received Maintenance Form.

Correspondence Received Applicant
This field details the name of the Person that the Correspondence has been received from.

Letter Details
This field if populated, will display the details of any Letter that has been sent to this particular person.

Request
This button will only be available for selection if the particular person has had a letter sent to them. Details of this letter will be displayed in the Letter Details field. This Request Button may then be select to view the Document Request form and if necessary regenerate or print the letter.

Response
This field allows the User to enter a predefined code Setup for the Correspondence Received code.

Response Pop Up
This Pop Up Button may be selected if the User is unsure of codes previously entered. The Pop Up Button will display the list of predefined codes. Once a required code is selected and the Select Button is pressed, the User will be returned to the Correspondence Received Maintenance Form with the Code populating the field.

Response Date
This field displays the date that the Correspondence is received on. It will default to the current date, the User may modify this if required. The User may also double click in the field to be presented with the Calendar. This will allow the User to select from a previous date or forward date if necessary.

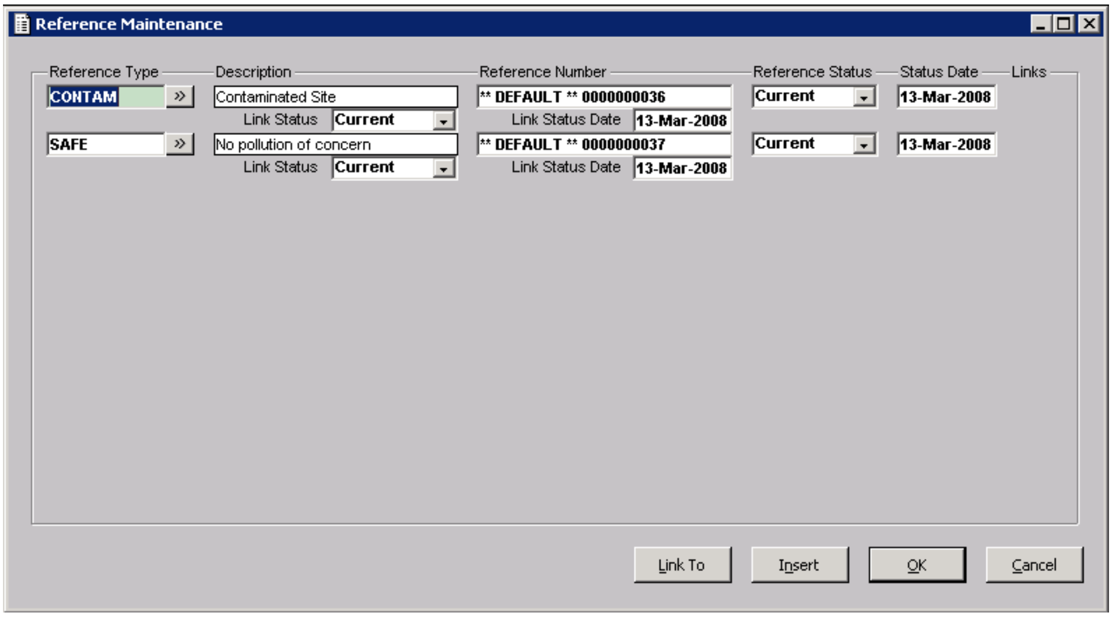
Summary of Response
This field allows the User to enter any details that may be required at a later date regarding the Correspondence Received. This is a multi-lined field.

References

Reference Maintenance allows the creation of new references or linkage to previously created references set up as “Sharing”.

The Maintenance and Linking of References is detailed separately in the References Manual.

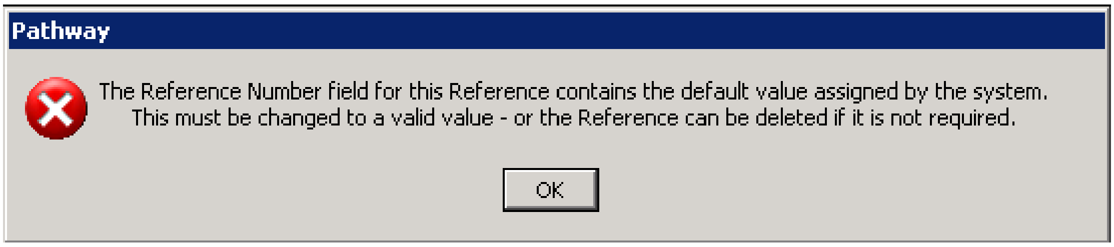
When a new Licence is entered, it will now check to see if any default References have been assigned for the Licence Type of the Licence being entered. If so, it will create one new Reference against the Licence for each Reference Type found.



Reference Maintenance

NOTE When these References are created by the system, they will be created with the Reference Number set to a unique default value comprising the following:-
The literal “** DEFAULT **”
plus a 10 digit zero-filled, right aligned number
This should then be changed to a valid value by the user – or the Reference can be deleted if it is not required.

When the [Ok] button is pressed, if any References exist with a default Reference Number, then the following error will be issued.



NOTE If, for any reason, you don’t wish to change the Reference Number – or delete the Reference just now, then the [Cancel] button can be pressed but you will not be able to maintain any References for the Application until this problem is addressed.

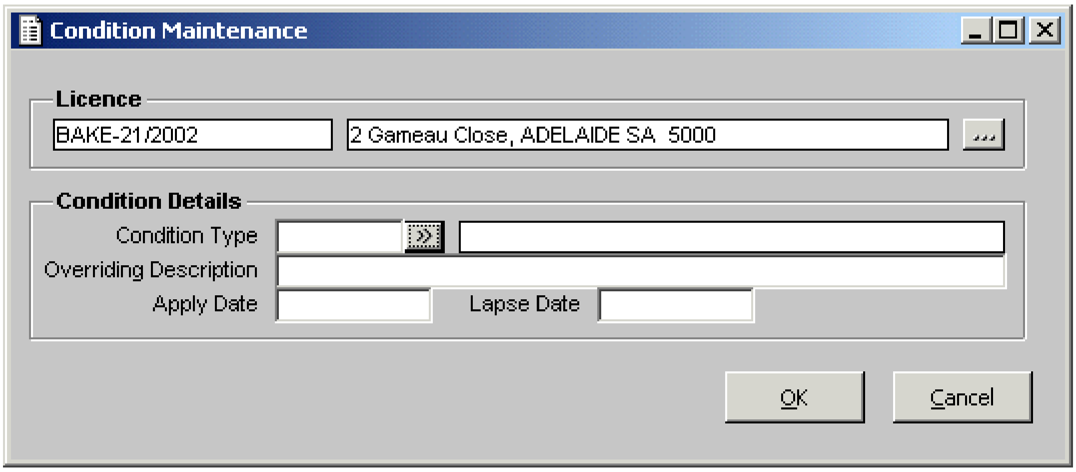
Conditions

Conditions may be added to a Licence to alert the User to a particular situation that may be peculiar to that Licence. The Conditions may be added as Notifiable Conditions. These Notifiable Conditions will be displayed on the screen as soon as the Licence is accessed.

For full details on adding and modifying Conditions, please refer to the Conditions Manual.

Conditions Maintenance – Multi-Licence Option Form

This form enables the addition of standard condition types to Licences.



Condition Maintenance Form - Multi Maintenance

Licence

These fields detail the actual Licence currently selected and its detailed Location. The Detail Button can be selected to display a list of all the Licences that have been selected to be updated by the function.

Condition Type

This field contains the Condition Type code that is linked to the Type of Condition nominated above. New Condition Types may be selected using the pop-up button. The description associated with the selected Condition Type will also be displayed.

Overriding Description

This field enables an overriding description of the condition to be entered. This description may be subsequently utilised on word processing documentation that contains condition details. If no overriding description is entered, the description relating to the selected Condition Type will display.

Apply Date

This field is the date from which a condition will apply to a Licence. This information is available for printing on Word Processing Certificate and Notice documents.

Lapse Date

This field is the date that a condition is no longer applicable to a Licence. This information is available for printing on Word Processing Certificate and Notice documents.

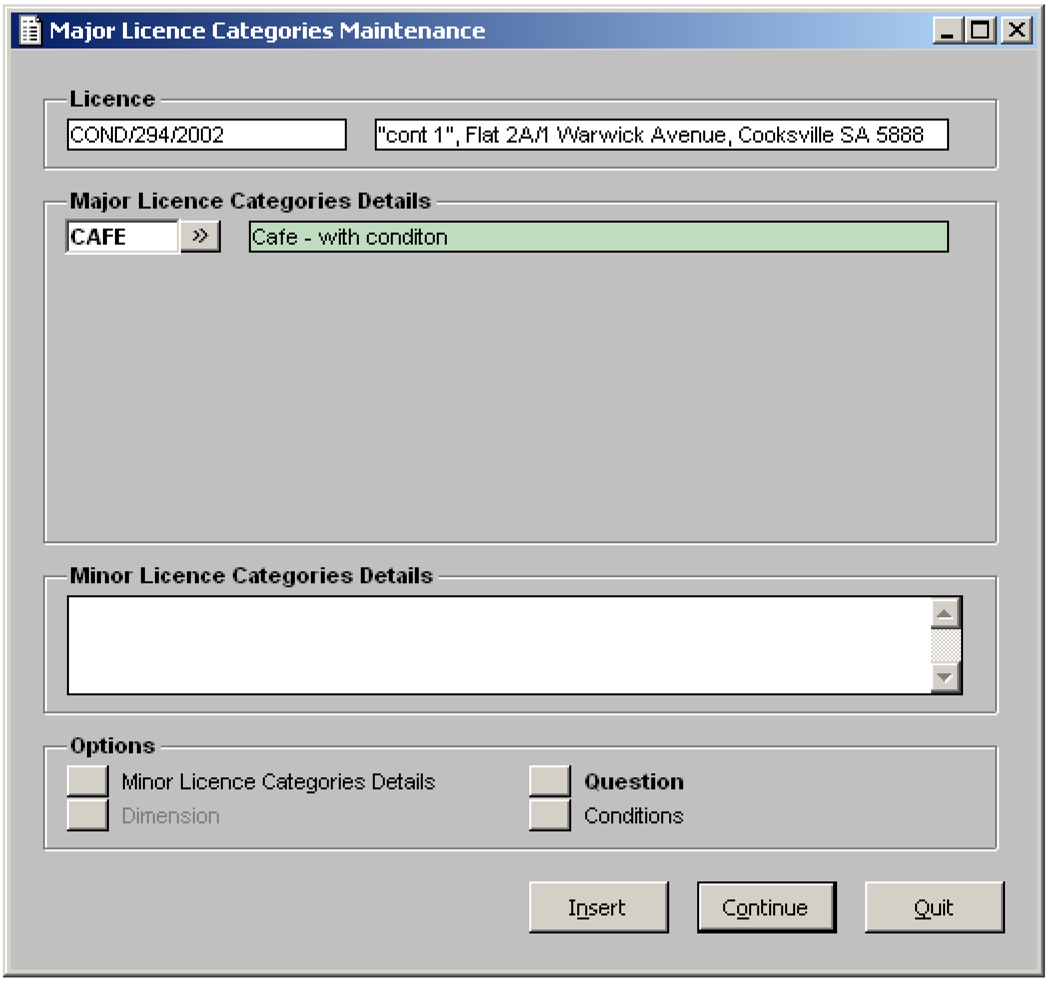
Licence Categories

Major Development Categories
Major Development Categories may be used to further describe a Licence. The Categories may be used for reporting and statistical purposes. These categories are User Definable.

Minor Development Categories
For each Major Development Category, an unlimited number of minor categories may be established. This parameter is used to establish various categories, which may be applied to a Licence. Individual Minor Categories may also have Dimensions associated with them.

Major Licence Category Maintenance Form

The Major Licence Category Maintenance allows large types of Licences to be grouped together with Minor Categories attached to it. This can be used for Reporting as well as particular fees against each of these types.



Major Licence Categories Maintenance Form

Licence
The Licence field details the current Licence Number and type in the left hand side box, and the right hand side box details the actual location of the Licence.

Major Licence Categories Details

The Type field allows for the keying of the predefined code for the Licence Category. If it is not known, the pop up button may be selected to display the list. Once selected, the Licence Category Maintenance form will be returned.

Minor Licence Categories Details
Details of the Minor Categories that have been assigned to the Major Category currently in focus are displayed in this field. As the focus is moved from one Major Category to the next so the detail displayed in this field will be changed to reflect the Minor detail for the Major.

Options – Minor Licence Categories
The Minor Licence Categories Option is available to allow the display of the details of the Minor Categories that are associated to the Major Category currently in focus.

Options - Question
Where a Question or Questions have been defined within the Licensing Categories parameters for the Major Category currently in focus then the Question Option button becomes available for selection. Where no Questions have been defined in the parameter for the Major Category then the Question Button is not displayed.

Options - Dimension
Where Dimensions have been defined for the Major Category then the Dimension Button can be selected to display all the Dimensions for all Major / Minor Categories that have been assigned to the Licence.

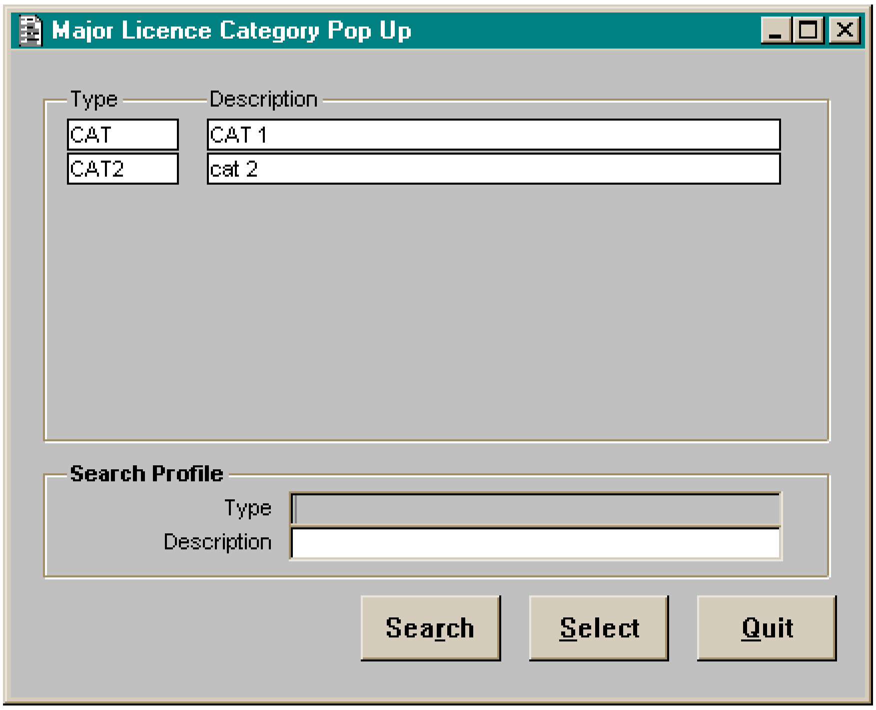
Options - Conditions
Pressing this button will display any Conditions that have been loaded for the Major Licence Category.   If this Option is not shown then there are no Conditions associated to the Major Licence Category.

If the Major Licence Category is being ‘Added’, then the Condition Option is not shown. The Option is only available when viewing a Major Licence Category in maintenance mode.

NOTE: - When these Major Licence Categories are used in Licensing Maintenance, in Licence Entry, Change Licence Type or inserting a new Fee, the assigned Condition will be loaded onto the Licence. The system will check for existing Standard Conditions and these Major Licence Category Conditions will only be loaded once if Standard but will always load if Non Standard. As the Conditions Option is a Secured Option it will only be available for use where the Council is authorised to the function.

Major Licence Category Pop Up Form

The Major Licence Category Pop Up allows for the selection of pre-defined Major Categories.



Major Licence Category Pop Up Form

Type
This field details the code assigned to the Major Category Type.

Description
This field fully details the Major Category Code.

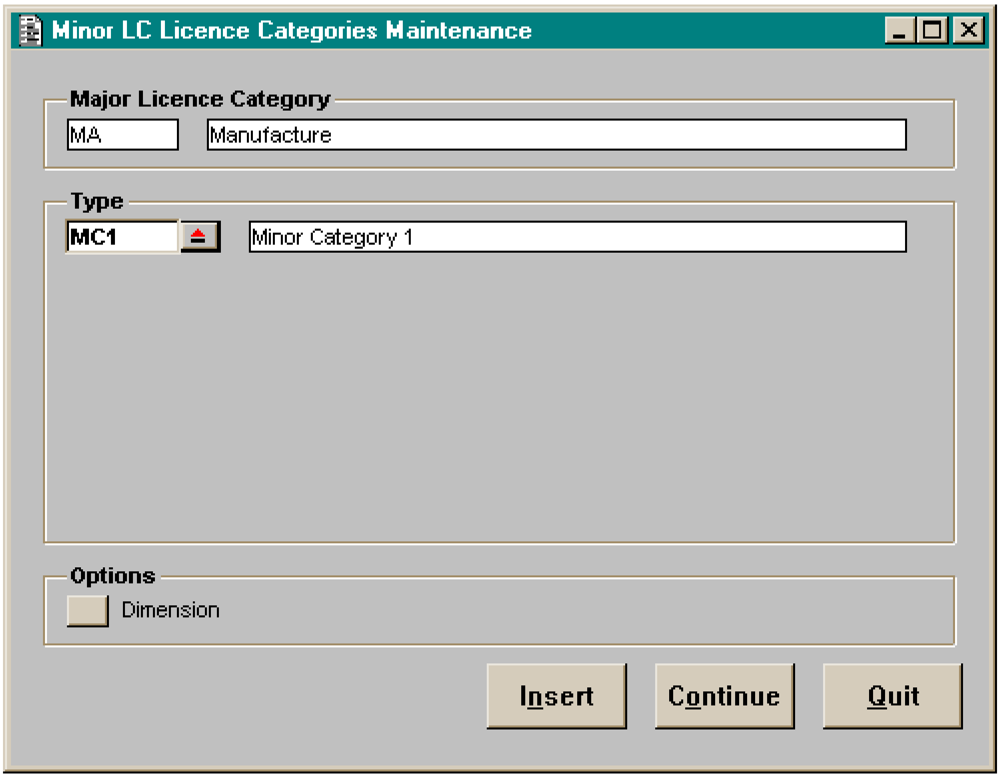
Type
The Type field is used to enter a code or part of the code for a Category. A Description may also be entered, or the Search button clicked to begin the Search.

Search Profile
The Search Profile may be used to “narrow” the list of Major Categories.

Description
This field may be used alone or in conjunction with the Type field as an aid to search for the Code required. Enter a description into this field and then select the Search button to begin the search. Matching Descriptions will be displayed for selection.

Options
Once a Major Licence Category has been selected, the Options field now displays a further button. This Button being ‘Minor Licence Category’. Clicking on this button displays the Minor Licence Category Maintenance form.

Minor Licence Categories Maintenance Form



Minor Licence Categories Maintenance Form

Major Licence Category

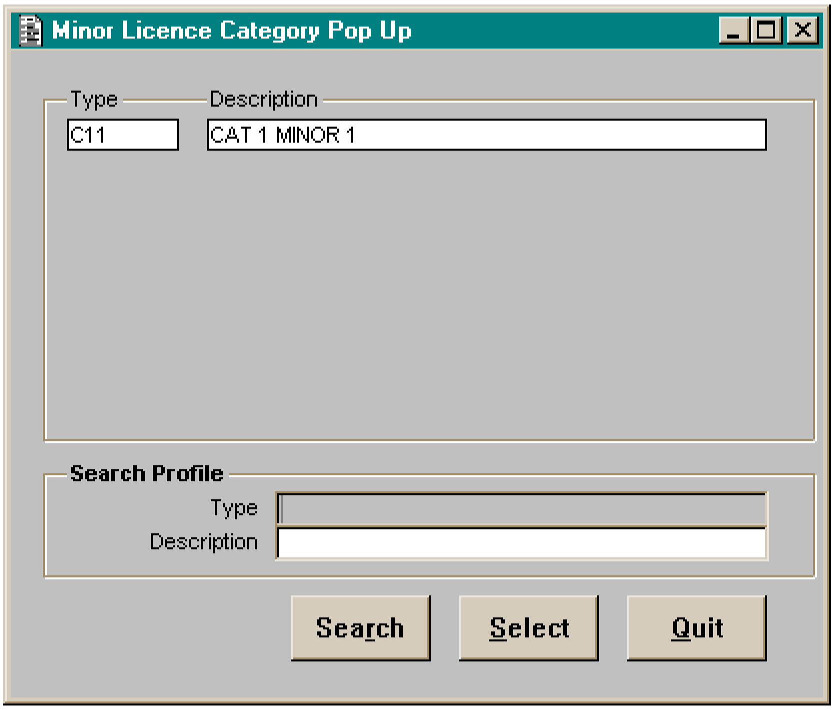
The Licence field details the current Licence Number and type in the left hand side box, and the right hand side box details the actual location of the Licence.

Type

The Type field allows for the keying of the predefined code for the Licence Category. If it is not known, the pop up button may be selected to display the list. Once selected, the Licence Category Maintenance form will be returned.

Minor Licence Category Pop Up Form

The Minor Licence Category Pop Up allows for the selection of pre-defined Major Categories.



Minor Licence Category Pop Up Form

Type
This field details the code assigned to the Minor Category Type.

Description
This field fully details the Minor Category Code.

Search Profile
The Search Profile may be used to “narrow” the list of Minor Categories.

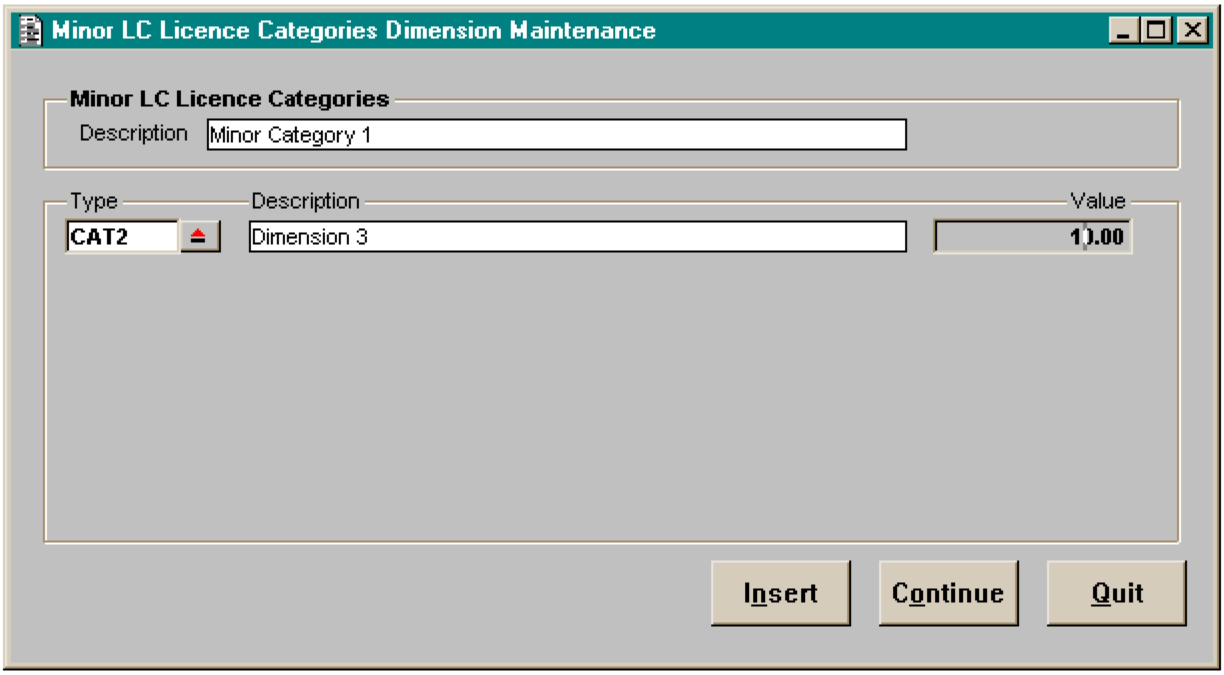
Type
The Type field is used to enter a code or part of the code for a Category. A Description may also be entered, or the Search button clicked to begin the Search.

Description
This field may be used alone or in conjunction with the Type field as an aid to search for the Code required. Enter a description into this field and then select the Search button to being the search. Matching Descriptions will be displayed for selection.

Options - Dimensions
Once a Minor Licence Category has been selected, the Options field now displays a further button. This Button being the Dimensions Maintenance Form. Clicking on this button Displays the Dimensions Maintenance Form.

Minor Licence Categories Dimensions Maintenance Form

The Minor Licence Categories Dimension form allows for the addition of a Dimension type and an associated value. The form consists of the following fields:-



Minor Licence Categories Dimension Maintenance Form

Minor Licence Categories - Description
The Description Field is the detailed Description given to the predefined code.

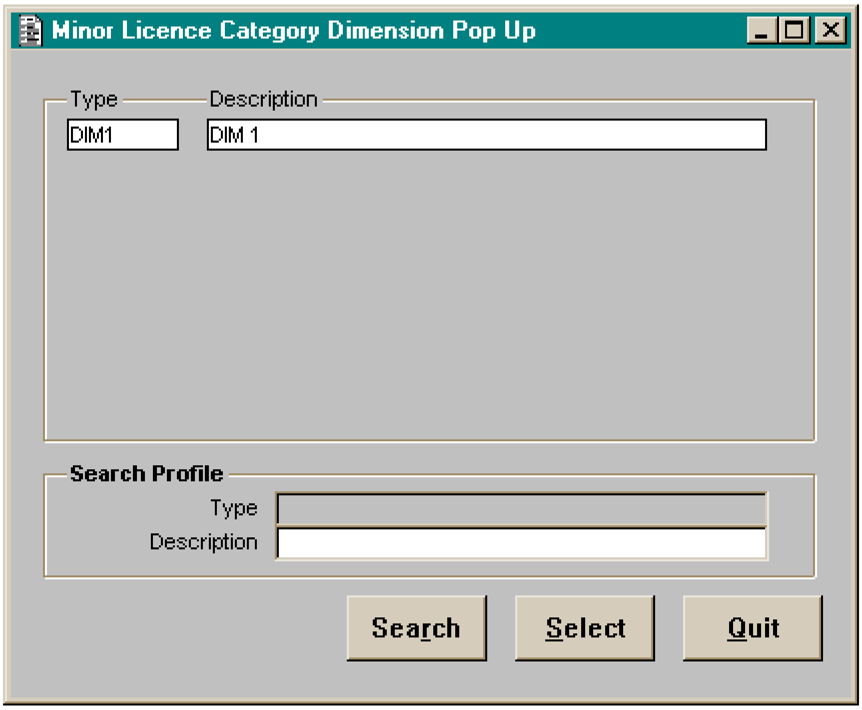
Type
The Type may be keyed in if know, or the Pop Up Button selected to choose from a predefined list of Dimension Types.

Description
Once the Type is selected its full description will be displayed in this field.

Value
The Value field is used to enter a specific Value according to the Type selected. For example it may be the Number of Floors in a Carpark, or the Number of Storeys in a Building, or it could be an actual dollar value.

Minor Licence Category Dimension Pop Up Form

The Minor Dimensions Category Pop Up allows for the selection of pre-defined Minor Dimension.



Minor Licence Category Dimension Pop Up Form

Type
This field details the code assigned to the Minor Dimension Type.

Description
This field fully details the Minor Dimension Code.

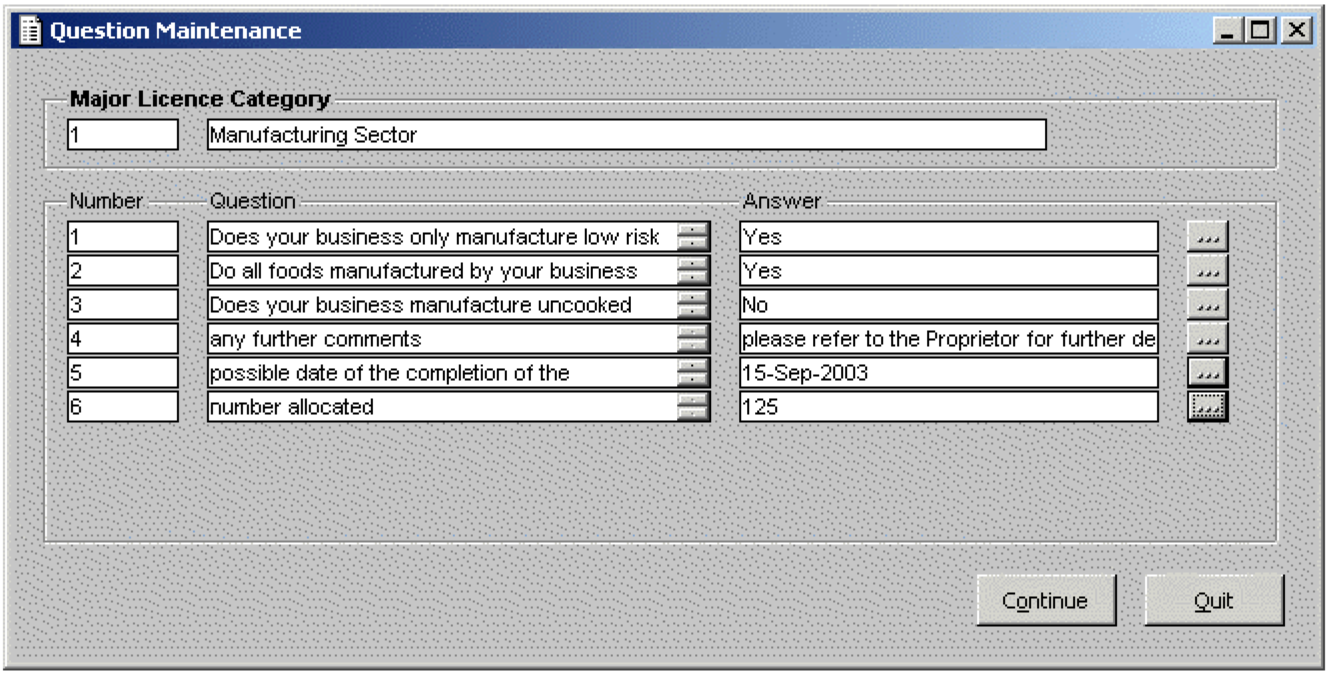
Search Profile
The Search Profile may be used to “narrow” the list of Minor Dimensions.

Type
The Type field is used to enter a code or part of the code for a Category. A Description may also be entered, or the Search button clicked to begin the Search.

Description
This field may be used alone or in conjunction with the Type field as an aid to search for the Code required. Enter a description into this field and then select the Search button to being the search. Matching Descriptions will be displayed for selection.

Question Maintenance Form

The Question Maintenance form is used to display the Questions that have been associated to the Major Licence Category and allow the entry or display of the Answers to these Questions.



Question Maintenance Form

Major Licence Category
The Major Licence Category Type and Description the Questions belong to is displayed in this area.

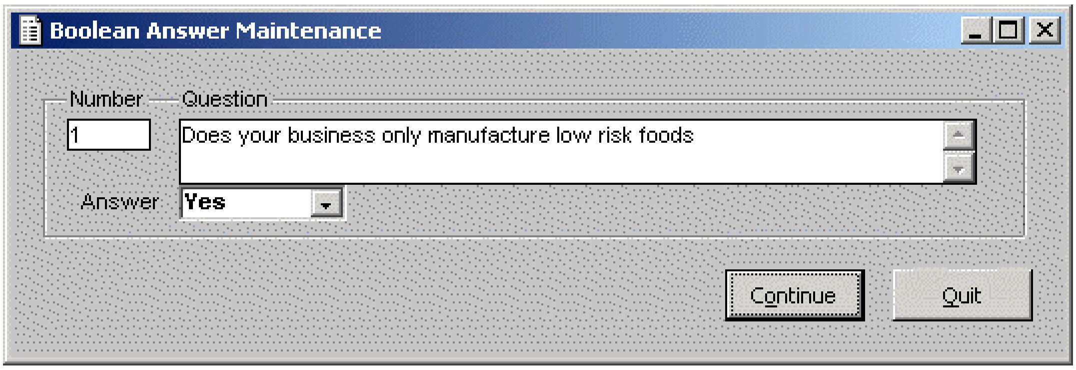
Number
The Number of the Question is displayed in this field.

Question
The Question as detailed in the parameters is displayed in this field. The scroll bars or zoom function can be used to display the Question in full.

Answer
If an Answer has been entered for the Question then it is displayed in this field. If the field is blank or the Answer is to be altered then the Detail Button can be selected to display the Answer Maintenance form.

Boolean Answer Maintenance Form

The Boolean Answer Maintenance Form is displayed when the Answer has been defined as a Boolean Question Type. It allows the answer of Yes, No or Undecided.



Boolean Answer Maintenance Form

Number
The Number of the Question is displayed in this field.

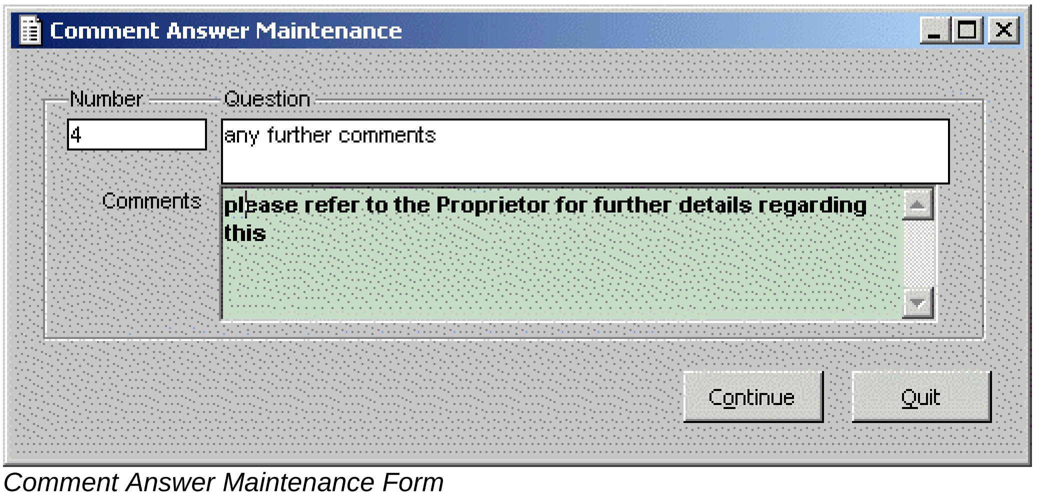
Question

The Question is displayed in full in this field.

Answer
The Answer field allows the selection of Yes, No or Undecided from the Dropdown. These are the only valid Answers allowed for the Boolean Answer Type.

Comment Answer Maintenance Form

The Comment Answer Maintenance Form is displayed when the Answer has been defined as a Comment Question Type. It allows the answer in a freeform layout.



Comment Answer Maintenance Form

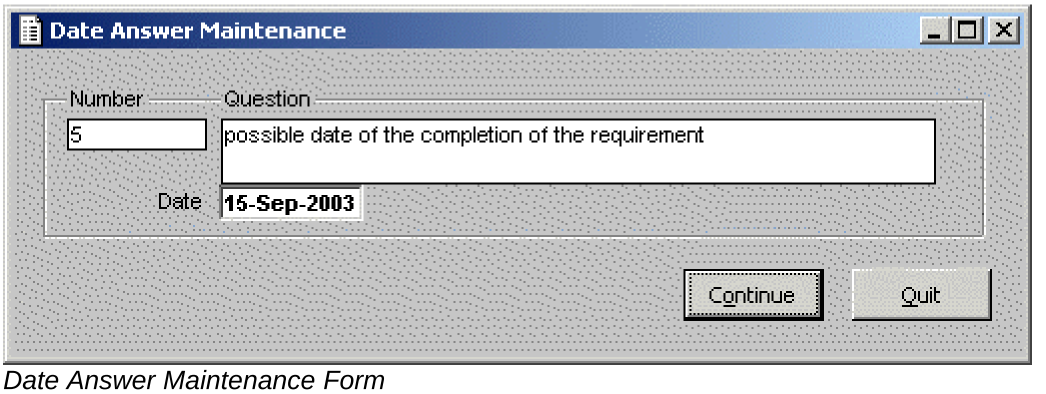
Number
The Number of the Question is displayed in this field.

Question
The Question is displayed in full in this field.

Comments
The Answer field allows the entry of Comments. This field is freeform and allows the entry of free form text.

Date Answer Maintenance Form

The Date Answer Maintenance Form is displayed when the Answer has been defined as a Date Question Type. It allows the entry of Date. The Calendar function can be used to select the required Date or the User can enter the Date in directly.



Date Answer Maintenance Form

Number

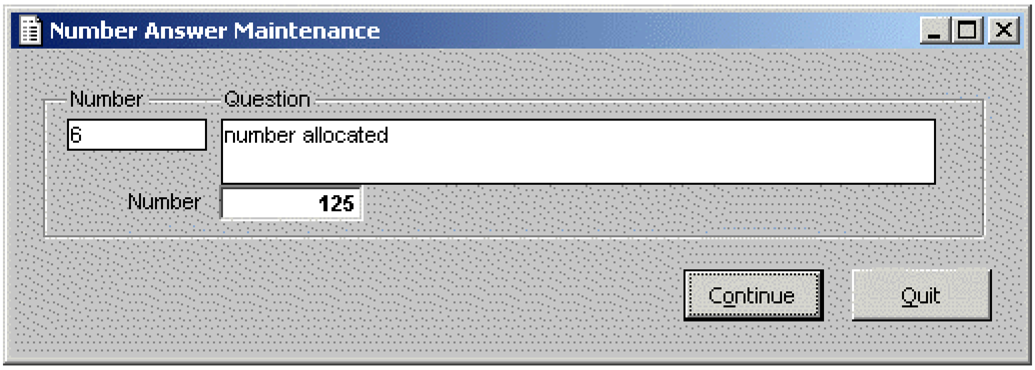
The Number of the Question is displayed in this field.

Question
The Question is displayed in full in this field.

Answer
The Answer field allows the selection of a Date. The Date can be entered directly into the field or the Calendar function used to select the required Date.

Number Answer Maintenance Form

The Number Answer Maintenance Form is displayed when the Answer has been defined as a Number Question Type. It allows the entry of a Number into the Answer field.



Number Answer Maintenance Form

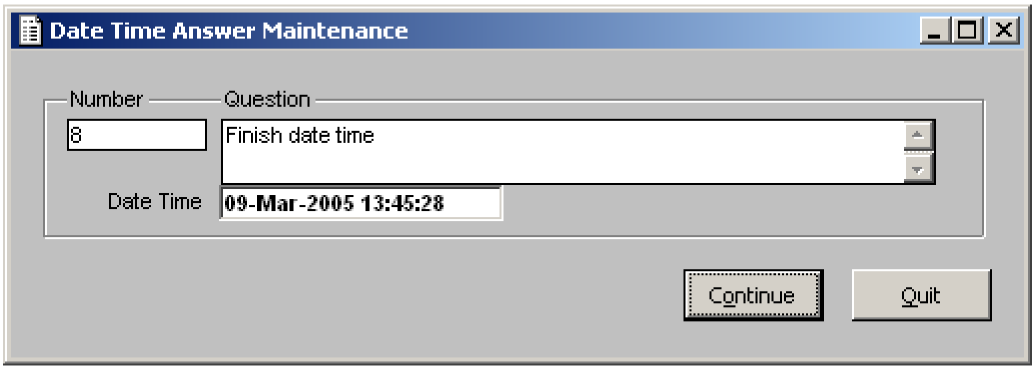
Number
The Number of the Question is displayed in this field.

Question
The Question is displayed in full in this field.

Answer
The Answer field allows the entry of a Number. This is a numeric field and therefore no other characters other than numbers can be entered.

Date Time Answer Maintenance Form

The Date Time Answer Maintenance Form is displayed when the Answer has been defined as a Date Time Question Type. It allows the entry of a Date and Time. The Calendar function can be used to select the required Date or the User can enter the Date/Time in directly.



Date Time Answer Maintenance Form

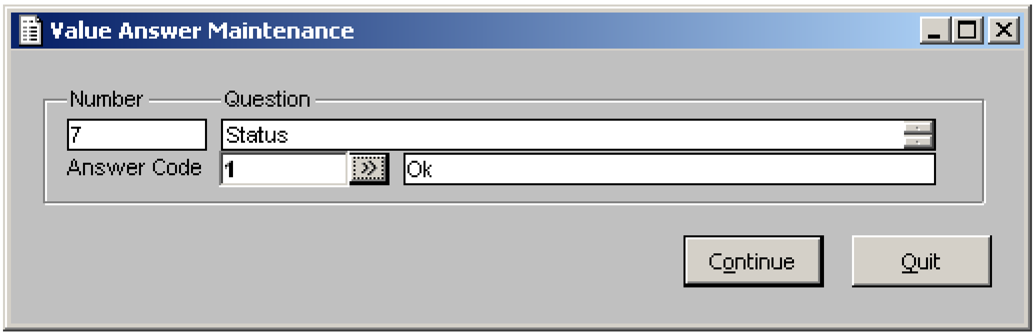
Number
The Number of the Question is displayed in this field.

Question
The Question is displayed in full in this field.

Date Time
The Answer field allows the selection of a Date/Time. The Date/Time can be entered directly into the field or the Calendar function used to select the required Date/Time.

Value Answer Maintenance Form

The Value Answer Maintenance Form is displayed when the Answer has been defined as a Value Question Type. It allows the selection of a user defined Code for the Question. The Code can be keyed directly in or the pop up used to display a list of valid Value Codes for the Question



Value Answer Maintenance Form

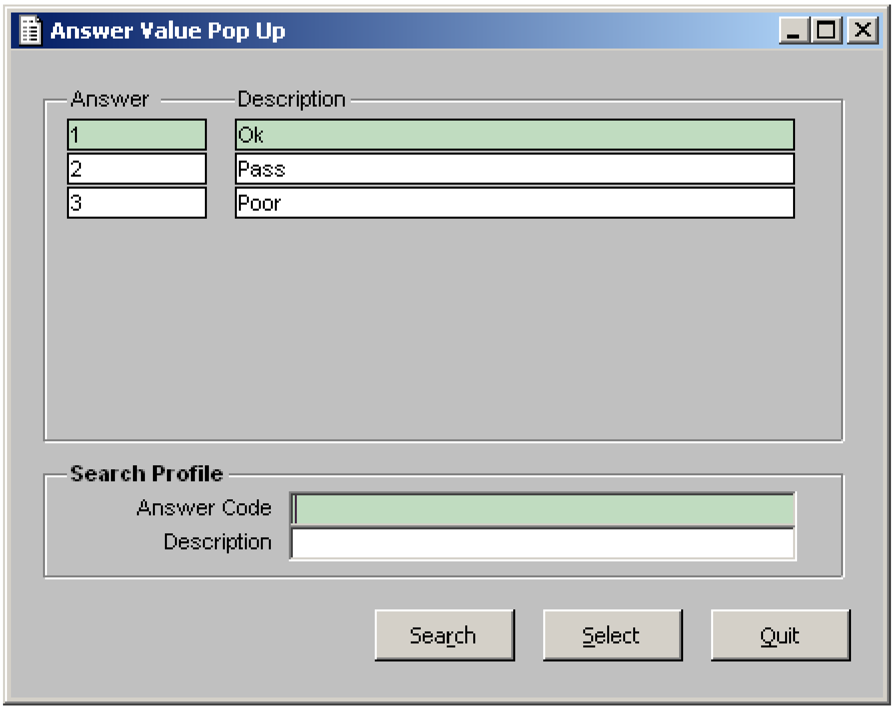
Number
The Number of the Question is displayed in this field.

Question
The Question is displayed in full in this field.

Answer Code
The Answer Code field allows the selection of a user defined Vaule Code. The Code can be entered directly or the Pop Up used to display a list of valid Answer Codes for the Question.

Answer Value Pop Up Form

The Answer Value Pop Up Form displays a list of user defined Values that are available for selection. These Values have been defined within the Parameters against the Question being answered.



Answer Value Pop Up Form

Answer / Description

The Answer Code and its Description are displayed for selection.

Search Profile – Answer Code

If a particular Answer Code is required then it can be searched upon using this field. The Answer Code can be entered and the Search Option selected to display the required Code. Wildcard searching is available in this field.

Search Profile - Description

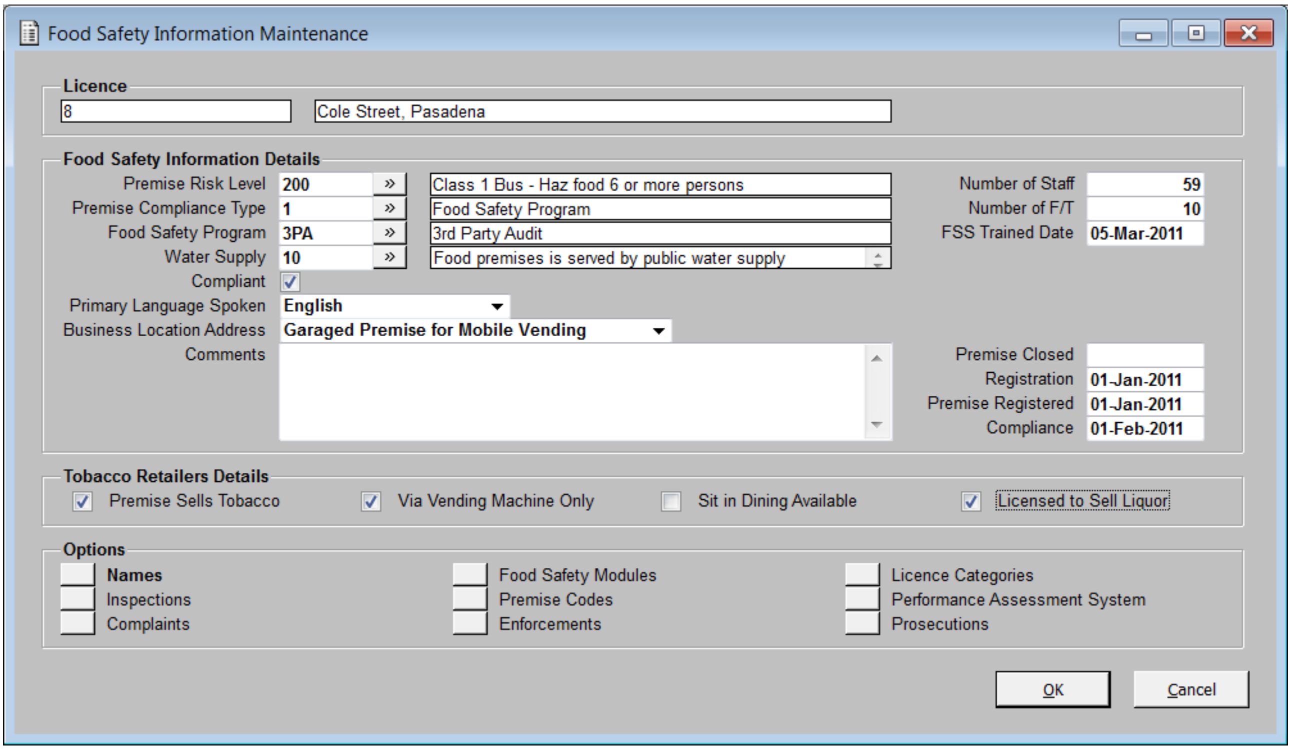
If a particular Answer Description is required then it can be searched upon using this field. The Answer Description can be entered (or part thereof) and the Search Option selected to display the required Value. Wildcard searching is available in this field.

Food Safety Information

Food Safety Information Maintenance Form

The Food Safety Information Maintenance form allows the documenting of information required for the various Food Safety requirements for SA and Victoria.

Within a Licence itself the following enhancements have been made to cater for the required information to be stored and then extracted to the Department of Health.



Food Safety Information Maintenance Form

Licence

This field details the number of the Licence currently selected and its full description.

Food Safety Information Details – Premise Risk Level

The Premise Risk Level is used to determine the level of risk from a Food Safety point. The Risks are set up in the Licensing Food Safety Parameters. The Risk Level can be entered directly or the Pop Up used to display a list of valid Premise Risk Levels to be used.

Food Safety Information Details – Number of Staff

The Number of Staff field is used to record the number of employees including part time and full time staff.

Food Safety Information Details – Premise Compliance Type

The Premise Compliance Type allows for the recording of the type of compliance that has been put in place. Whether is by a 3rd Party or using the Standard Compliance Types. The Premise Compliance Types are defined in the Food Safety Parameters. The Type can be keyed in directly or the Pop Up used to display a list of Types available.

Food Safety Information Details – Number of F/T
The Number of Full Time Equivalent Employees handling food is required in this field.

Food Safety Information Details – Food Safety Program

The Food Safety Program that is being used by the Premise is displayed in this field. The Program can be keyed in directly or the Pop Up used to display a list of Programs available. The Food Safety Programs are defined in the Food Safety Parameters.

Food Safety Information Details – Water Supply
Use the pop up button to select how the water supply for this licence is accessed.

Food Safety Information Details – FSS Trained Date
The FSS Trained Date field is used to record the date that the Food Safetyp Staff were trained.

Food Safety Information Details – Compliant
The Compliant flag is used to indicate whether the Premise is compliant or not with the Food Safety Program.

Food Safety Information Details – Primary Language Spoken
The Primary Language Spoken records the language that is spoken at the Premise. Languages are defined in the Food Safety Parameters with the ability to nominate a default language. The dropdown can be used to select the required Primary Language.

Food Safety Information Details – Business Location
The Business Location has three options available for selection. These are:-

- Address of Premise Location
- Permanent Station for Mobile Vending
- Garaged Premise for Mobile Vending

Food Safety Information Details – Comments
The Comments field can be used to record further information such as a short description of the business and its operation.

Food Safety Information Details – Extract Date
The Extract Date only displays when the Premises is Closed and the information has been extract for the last time within the FSI Extract process. This is the date of the Extract an is non maintainable by the user.

Food Safety Information Details – Premise Closed
The Date the Business closed can be recorded in the Premise Closed field.

Food Safety Information Details – Registration
If the Registration has been suspended then the date of suspension can be recorded in the Registration field.

Food Safety Information Details – Premise Registered
The date that the Business commenced can be recorded in the Premise Registered field.

Food Safety Information Details – Compliance
The date that the Business became compliant can be recorded in the Compliance field.

Tobacco Retailers Details – Premise Sells Tobacco
If the Premise sells Tobacco then this field can be flagged on. Otherwise the field can be flagged off.

Tobacco Retailers Details – Via Vending Machine Only
If the Premise sells Tobacco via a vending machine then this field can be flagged on to indicate this. Otherwise the field can be flagged off.

Tobacco Retailers Details – Sit in Dining Available
If the Premise allows sit in dining then this field can be flagged on to indicate this. Otherwise the field can be flagged off.

Tobacco Retailers Details – Licensed to Sell Liquor
If the Premise is licensed to sell liquor then this field can be flagged on to indicate this. Otherwise the field can be flagged off.

Options - Names
Selecting the Names Option button takes the User out to the Names Maintenance form where the names can be maintained, added or updated. If the Option button is bolded then there are names already on the maintenance form.

Options – Food Safety Modules
Selecting the Food Safety Modules button takes the User out to the Food Safety Modules maintenance form where Food Modules can be added or removed. If the Option button is bolded then there are already Food Modules on the maintenance form.

Options – Licence Categories
Selecting the Licence Categories button takes the User out to the Major Licence Categories Maintenance form. From this form the User can add or maintain Major/Minor Categories and any Questions that have been setup for the selected Major Category.

Options - Inspections
Selecting the Inspections button takes the User out to the Inspection selection form (if there are already Inspections on the Licence) or to the Inspection maintenance form if there are no Inspections linked to the Licence.

Options – Premise Codes
Selecting the Premise Codes button takes the User out to the Premise Codes maintenance form where Premise Codes can be added or removed. If the Option button is bolded then there are already Premise Codes on the maintenance form.

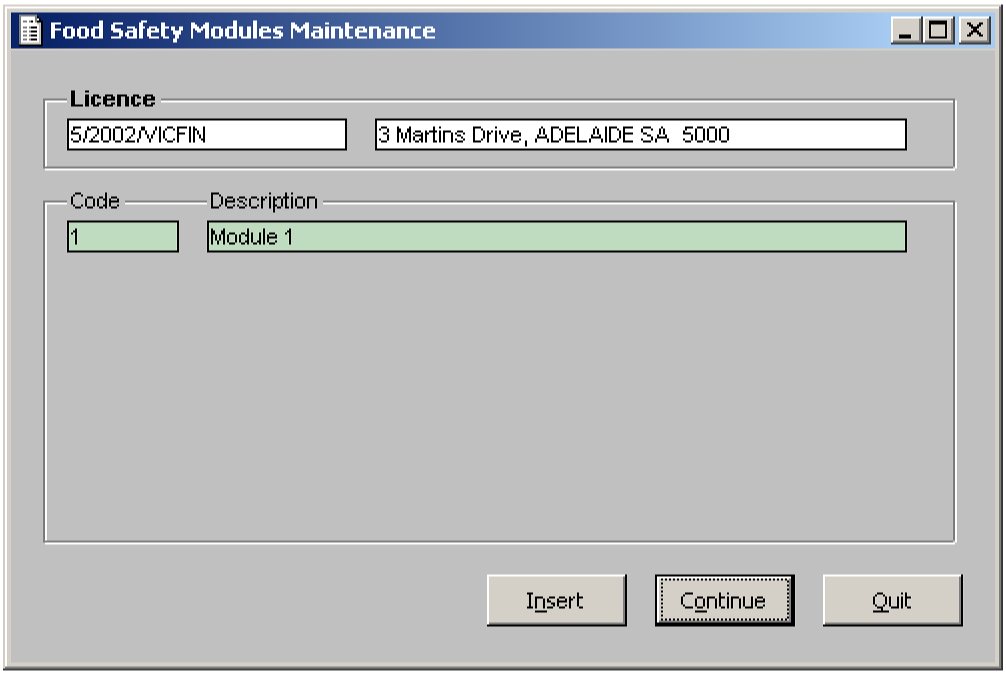
Options – Complaints
Selecting the Complaints button takes the User out to the Complaints Maintenance Form where complaints can be added or removed. If the option button is bolded then there are already Complaints on the maintenance form.

Options - Enforcements
Selecting the Enforcements button takes the User out to the Enforcement Maintenance Form where complaints can be added or removed. If the option button is bolded then there are already Enforcements on the maintenance form.

Options – Prosecutions
Selecting the Prosecutions button takes the User out to the Prosecutions Maintenance Form where complaints can be added or removed. If the option button is bolded then there are already Prosecutions on the maintenance form.

Food Safety Modules Maintenance Form

The Food Safety Modules Maintenance form allows the selection of the Modules for the Business and to be included in the recording of the information for the Food Safety Information. The Food Safety Modules are defined in the Food Safety Parameters.



Food Safety Modules Maintenance Form

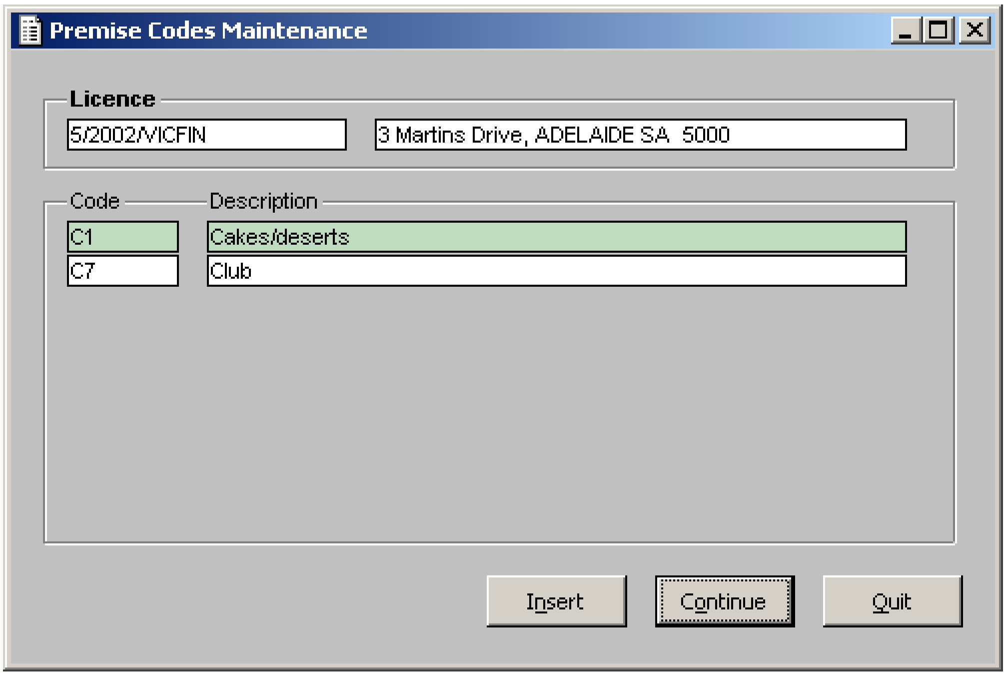
Licence
This field details the number of the Licence currently selected and its full description.

Code
The Module Code is displayed in this field.

Description
The Description of the Food Safety Module is displayed in this field.

Premise Codes Maintenance Form

The Premise Codes Maintenance form allows the selection of the codes to define the type of Premise the Business is. The Premise Codes are defined in the Food Safety Parameters.



Premise Codes Maintenance Form

Licence
This field details the number of the Licence currently selected and its full description.

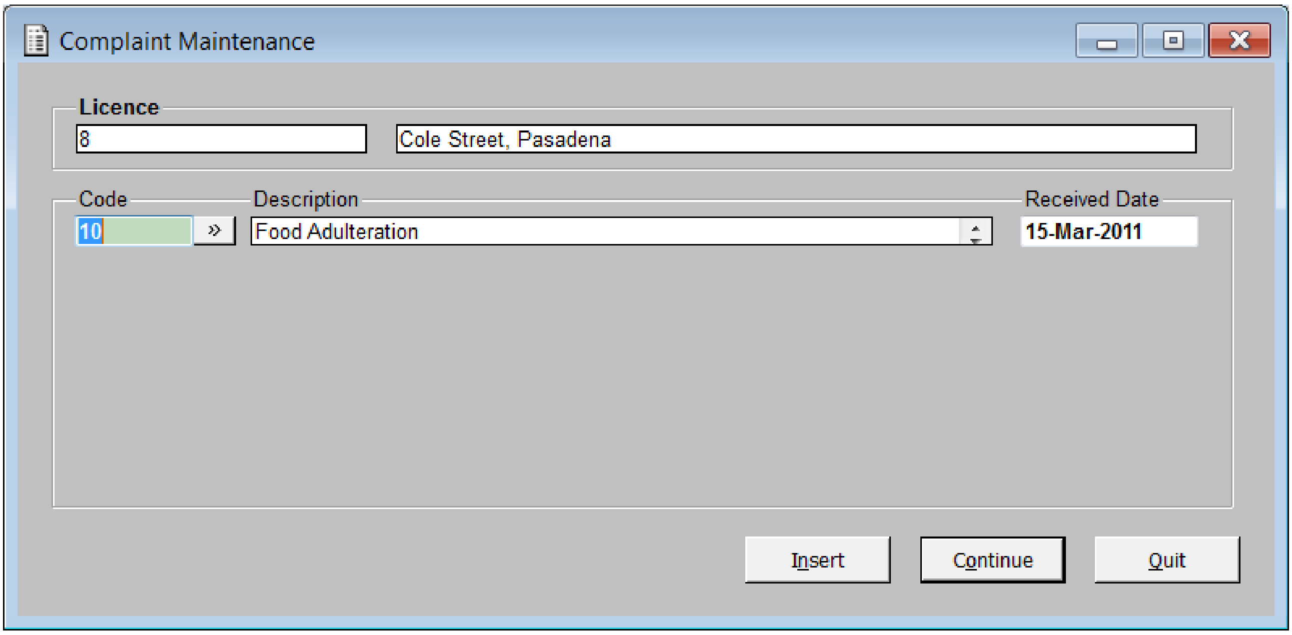
Code
The selected Premise Code is displayed in this field.

Description
The Description of the selected Premise Codes is displayed in this field.

Complaint Maintenance Form

Where a site uses the Pathway Customer Service Module to handle complaints, the Batch Process extract process will have a flag available to be checked ON. Where a site checks this ON, the system will then check for a record of a Customer Request linked to the Licence record and then check the mapping codes to assign the correct DoH Complaint value to the XML extract.

Where a site does not use the Pathway Customer Service module, then the following functionality is available to manage Complaints that may need to be logged against a Licence record.
Upon the selection of the Complaints option the user will be presented with the following form.

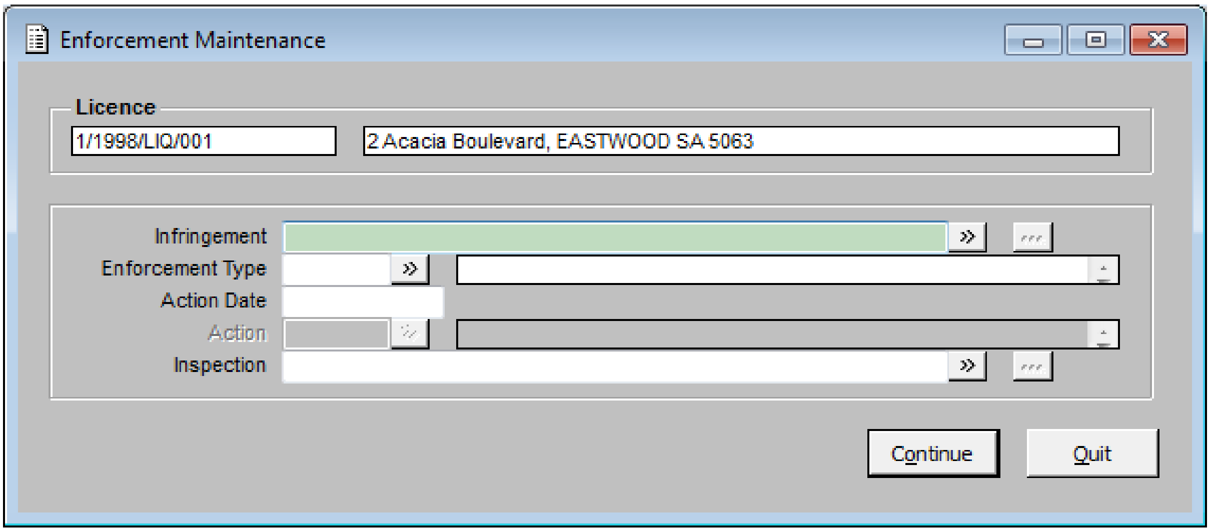


Complaint Maintenance form

Complaint Maintenance – Licence Code and Description
This is the Licence code and description of the licence that was initially selected.

Complaint Maintenance – Received Date
This is the date that the complaint was received.

Enforcement Maintenance

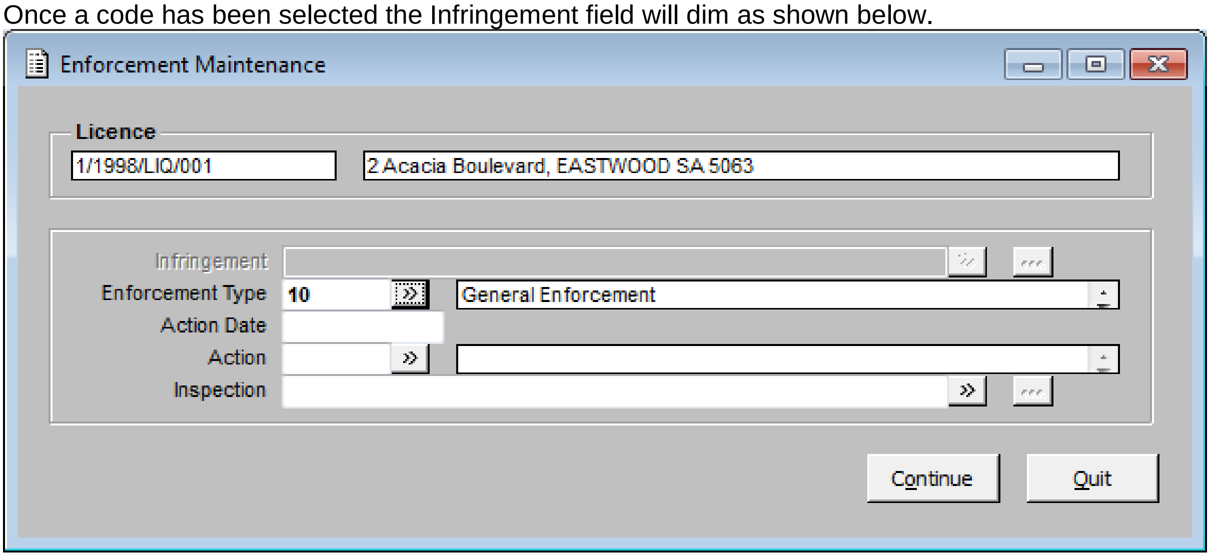


Enforcement Maintenance form

Upon selection of the Enforcements option from the Food Safety Maintenance form, users will be presented with the form above.

Where a Pathway Site does not use the Pathway Infringements Module, ignore the Infringement field and proceed to select an Enforcement Type either by keying the code directly into the field or selecting from the pop up.

Once a code has been selected the Infringement field will dim as shown below.



Enforcement Maintenance form

Enforcement Maintenance - Infringement

The user can use the pop up button to allow the system to display an infringement(s) that is linked to the licence. Once displayed the user can select the relevant infringement.

Enforcement Maintenance – Enforcement Type

The enforcement type will be defaulted from the infringement if one has been selected otherwise the user can use the pop up button to allow the display of of Enforcement Types from which to choose.

Enforcement Maintenance – Action Date

This date will be populated from the Infringement selected, if no Infringement was selected and an enforcement type only was selected the action date for the enforcement type will be required to be entered.

Enforcement Maintenance – Action

Use the pop up button to select the relevant enforcement action that is to be linked to this enforcement. This field is mandatory.

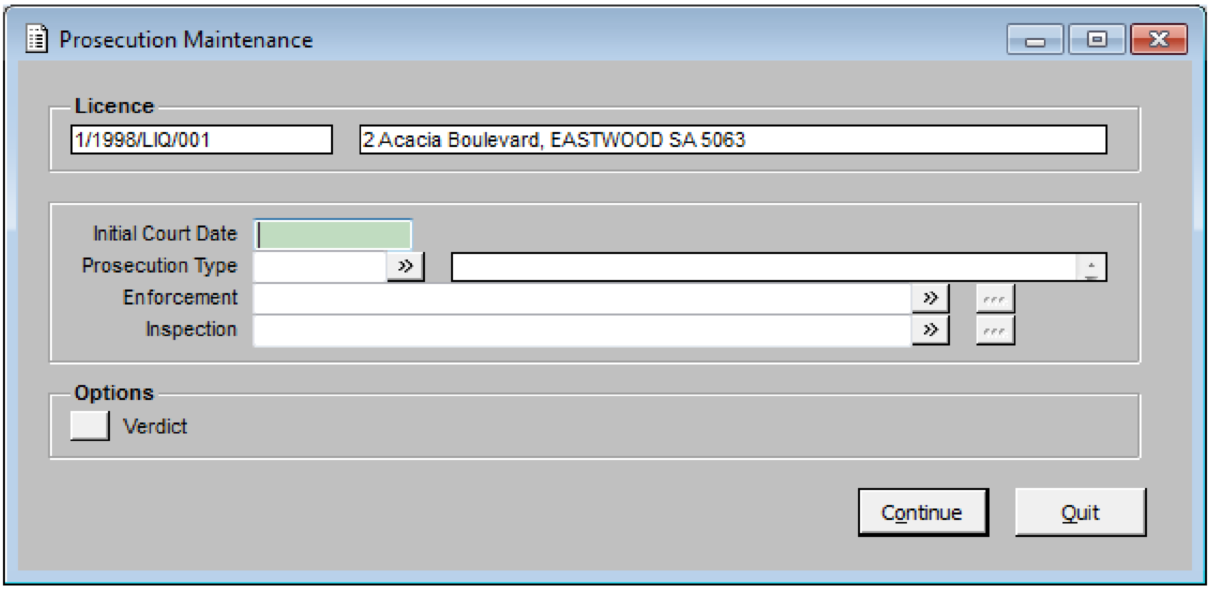
Enforcement Maintenance – Inspection

The Inspection that instigates this Enforcement should be selected by the pop-up button.

Prosecution Maintenance

Upon selection of the Prosecution option, users will be presented with the Prosecution Maintenance form. The form allows for the entry of the Initial Court Date, Prosecution Type, the Enforcement Type, Enforcement or the Inspection that instigated the Prosecution.

Additionally a Verdict Option is available to enter the required Verdict Details.



Prosecution Maintenance form

Prosecution Maintenance – Initial Court Date
Users are able to key a date directly into the Court Date field, or double click into the field and select a date from the calendar.

Prosecution Maintenance – Prosecution Type
If the Prosecution Type is known users will be able to key directly into the field or use the pop-up to select from previously created parameters.

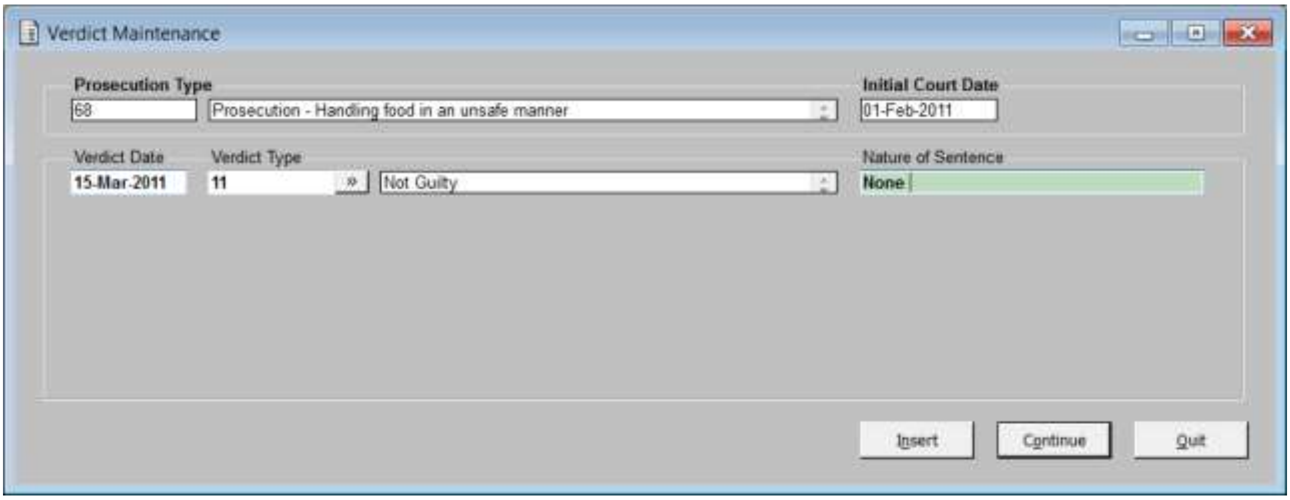
Prosecution Maintenance – Enforcement
Users would then select the detail button on the Enforcement field or the Inspection field to select the record that instigated the Prosecution.

Prosecution Maintenance – Inspection
Use the pop up button to select the Inspection that is linked to this prosecution.

Where an Enforcement Type of “12” has been created but the user does not create a Prosecution record, then the batch process will extract an Exception so the user is forced to come back and create the required record.

Verdict Maintenance

This form allows for the entering of the verdict of an enforcement.



Verdict Maintenance form

Verdict Maintenance – Prosecution Type, Description and Initial Court Date

These fields display the details of the selected Prosecution Type.

Verdict Maintenance – Verdict Date
Enter in the date of the verdict.

Verdict Maintenance – Verdict Type
Use the pop up button to select the required Verdict Type.

Verdict Maintenance – Nature of Sentence
This is a free form comment box – it can contain up to 100 characters.

Food Safety Information Maintenance Form – Multi-Maintenance Option

The Food Safety Information Maintenance form allows the User to update fields on the Licences that have been multi selected on the Selection Form.

Note that the Checkbox fields will only be updated if they are checked 'On' and the date fields changed if a 'Date' has been entered. Only those licences already with some FSI details setup will be updated. Any other selected licences will be ignored unless the 'Create Food Safety Information Details' option has been flagged on.

Where this field is flagged on then the information will be updated on those Licences with FSI information and a FSI record created for those Licences that do not have one.

Food Safety Information Maintenance Form

Food Safety Information Details – Compliant

The Compliant flag is used to indicate whether the Premise is compliant or not with the Food Safety Program.

Food Safety Information Details – Compliance Checked

The date that the Business became compliant can be recorded in the Compliance field.

Food Safety Information Details – Premise Closed

The Date the Business closed can be recorded in the Premise Closed field.

Tobacco Retailers Details – Premise Sells Tobacco

If the Premise sells Tobacco then this field can be flagged on. Otherwise the field can be flagged off.

Tobacco Retailers Details – Sit in Dining Available

If the Premise allows sit in dining then this field can be flagged on to indicate this. Otherwise the field can be flagged off.

Tobacco Retailers Details – Via Vending Machine Only

If the Premise sells Tobacco via a vending machine then this field can be flagged on to indicate this. Otherwise the field can be flagged off.

Tobacco Retailers Details – Licensed to Sell Liquor

If the Premise is licensed to sell liquor then this field can be flagged on to indicate this. Otherwise the field can be flagged off.

Create Food Safety Information Details

If the Create Food Safety Information Details opion is flagged on then any multi-selected Licences that do not currently have any FSI records against them will have then created using the detail selected on this form. Otherwise the field can remain flagged off so that only existing FSI records are updated on the multi-selected Licences.

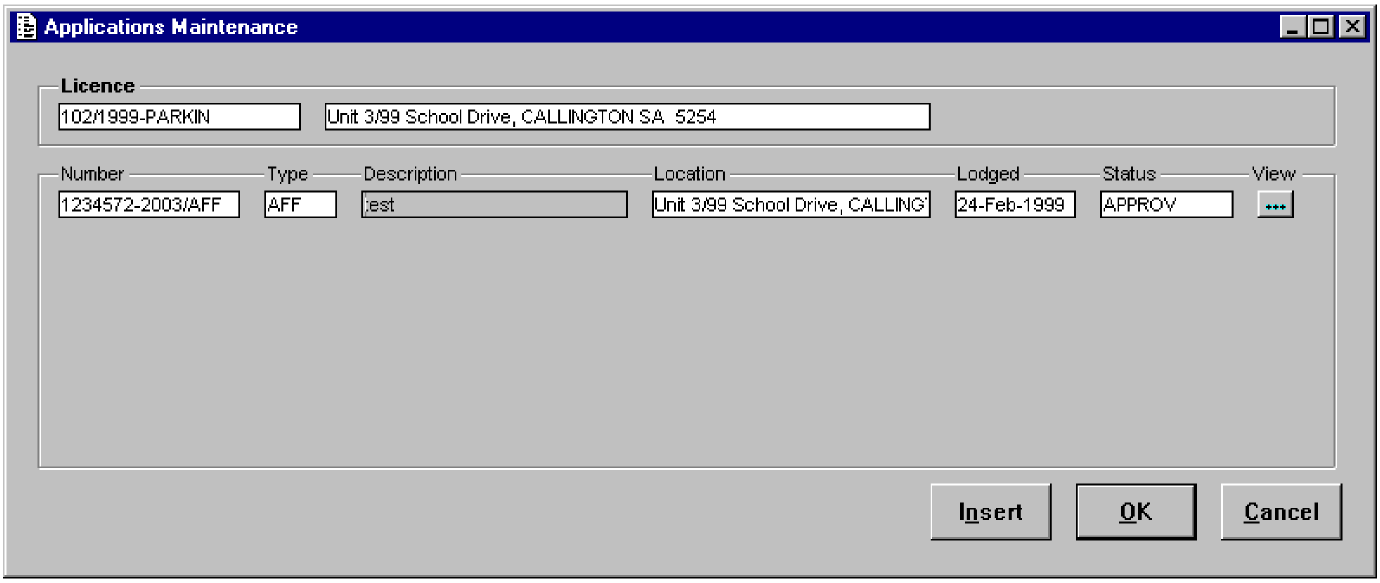
Options – Selected Licences

Selection of the Options button will display a list of the Licences that have been multi selected for update of the Food Safety Information.

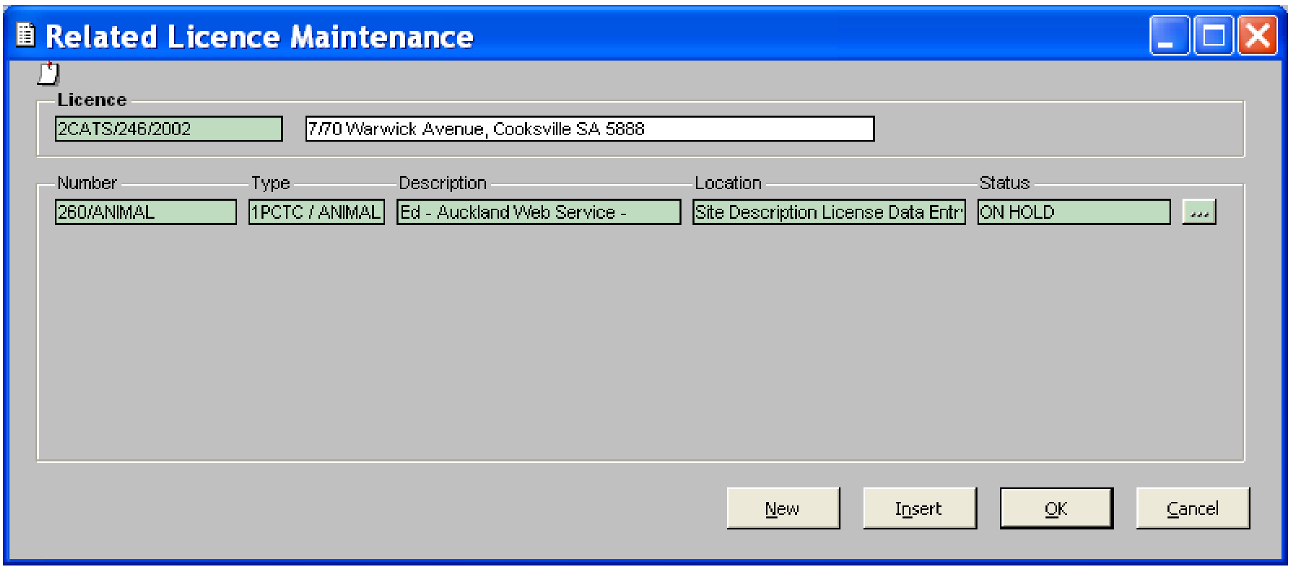
Applications

Application Maintenance Form

This Application Maintenance Form allows the User to view or insert any Applications that may be connected to this particular Licence. Please note that the same form (although with a different heading) is used for related application.



Application Maintenance Form



Related Application Form

Licence

This field details the number of the Licence currently selected and its full description.

Number

This field when populated is the Application Number that is to be associated with this Licence.

Type
This field when populated details the Type of the Application that is to be associated with this Licence.

Description
This field when populated details the Description of the Application that is to be associated with this Licence.

Location
This field details the actual Location of the Application selected to associate with this Licence.

Lodged
This field details the date that the Application selected was Lodged.

Status
This field details the Status assigned to the Application.

View
Selecting the view button on an Application that is detailed allows the User to detail out and see the actual Application Summary Form. If the User has the appropriate Authority, they may also modify details on the Application.

This Applications form as mentioned before allows the User to view any existing Applications that may have been associated by another User, or click the Insert button to search for an Application. Once this Application is selected the detail will be displayed in the appropriate fields.

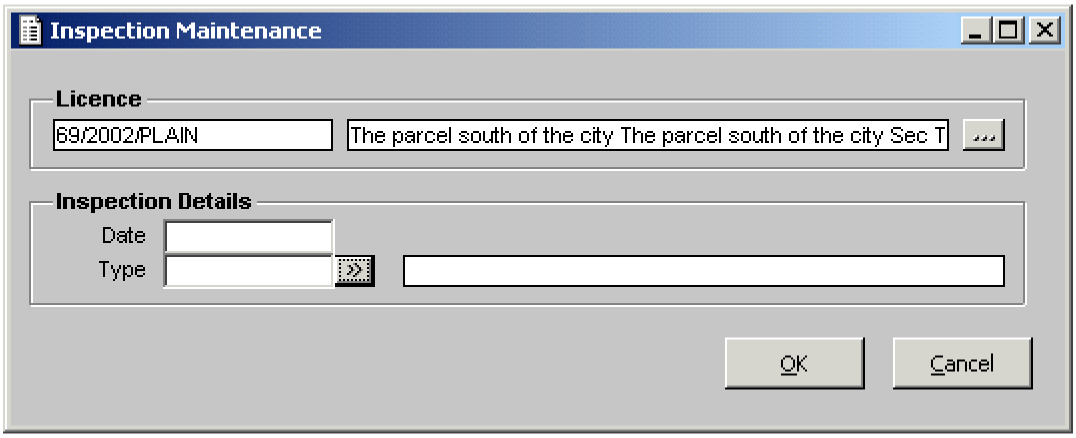
Inspections

Inspection Maintenance Form – Multi-Maintenance Option

The Inspection Maintenance Form is displayed when the Multi-Maintenance Option has been selected from the Selection Form. This allows the entry of an Inspection to be put against the selected Licences.

When using this option the Date field can be left blank and the Inspection Report run at a later date to show those Inspections that have not been scheduled. Additionally, when using the Inspection Maintenance Form via the Multi Maintenance Option there is no checking done regarding double bookings etc.

NOTE: When using this Option that any Fees that might be assigned to an Inspection will not get loaded at this point. It will be necessary to visit each created Inspection and nominate for the Fees to be generated.



Inspection Maintenance Form - Multi-Maintenance Option

Licence

These two fields detail the Licence and its Primary Location. A Detail Button is displayed to allow the User to display all the Licences that have been selected to be updated by the entry of an Inspection.

Inspection Details - Date

This field allows the User to enter a Date that the Inspection is to be carried out. This field can be left blank if the Inspections are to be added with no date and will be scheduled later.

To pick up those Inspections that have been added with a blank date it will be necessary to run the Inspection Report nominating ‘Unscheduled’ to produce a report of those Inspections that have not been scheduled (no Date entered).

Inspection Details - Type

This field allows the User to enter an Inspection Code, if known or click the Pop Up Button to select from a predefined list.

Set Cashier Warning

Cashier Warning Codes are predefined in the Licence Parameters. Once defined, they may be selected and placed against the Licence that the User is currently working on.

Warning Codes Pop Up Form

Warning Codes Pop Up Form

Code
This field displays the Code Assigned to a Cashier Warning.

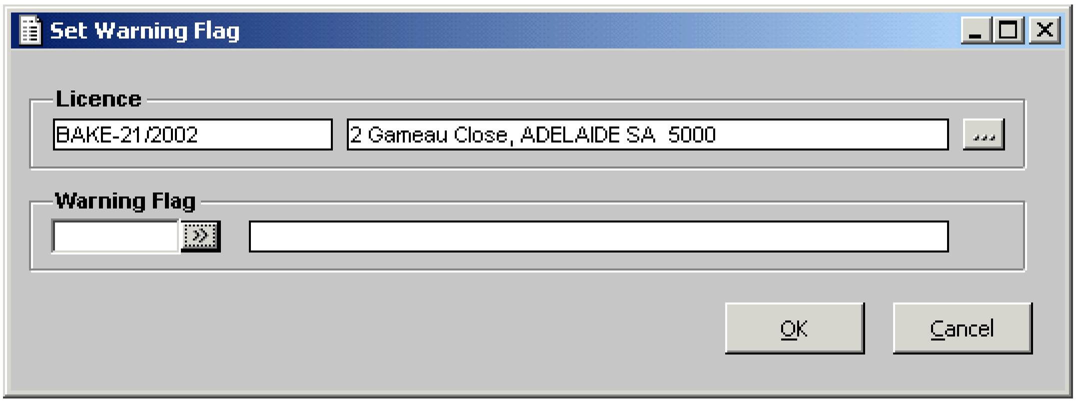
Description
This field displays the Description assigned to the Cashier Warning Code.

Search Profile - Code
This field allows the User to enter a Code that may be Searched upon. Once a Code is entered, click the Search button to begin the Process.

Search Profile - Description
This field allows the User to enter a Description that may be Searched upon. Once a Description is entered, click the Search button to begin the Process.

Set Cashier Warning Code – Multi-Maintenance Option

The Set Warning Flag form allows the User to set the Cashier Warning Flag on the Licences that have been multi selected on the Selection Form.



Set Cashier Warning Code - Multi-Maintenance Option

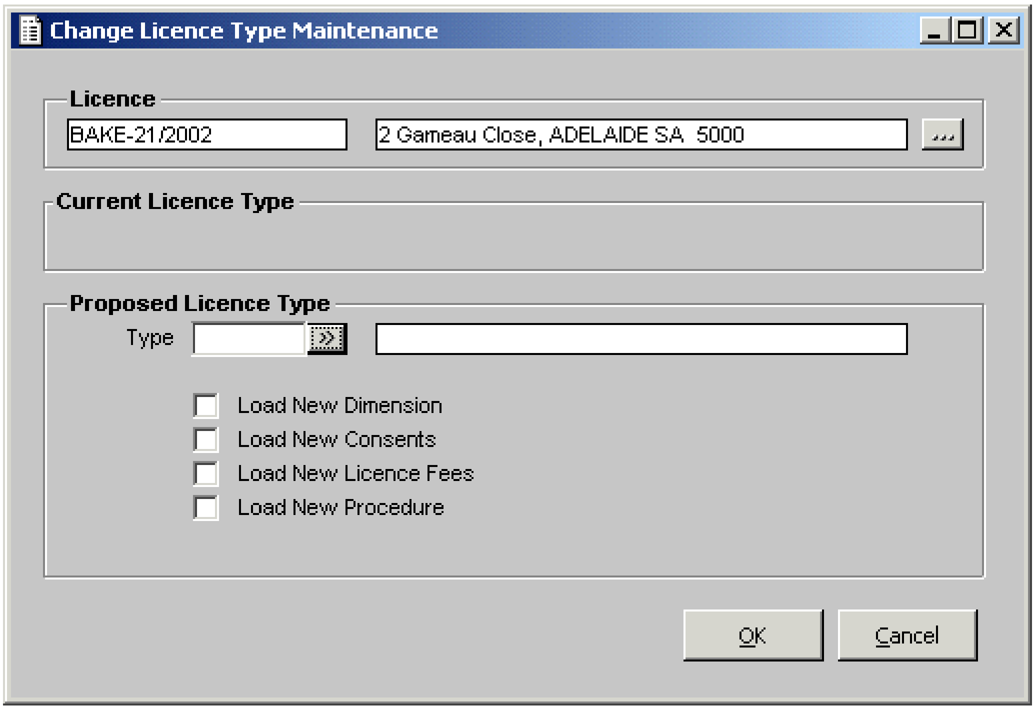
Warning Flag

Enter in the Cashier Warning Code that is required to be placed on the selected Licences. If the Code is not known then the Pop Up can be used to display a list of valid Cashier Warning Codes that can be used.

Change Licence Type

Change Licence Type Maintenance Form

The Change Licence Type Form is designed to allow the User to make changes to a Licence.Type. A new Type may be selected, and specific functions can be loaded to alter the Licence totally. The form is also displayed when the Multi-Licence Option has been selected.:



Change Licence Type Maintenance Form

Licence
These two fields detail the Licence Number and its Location.

Licence Detail Button
The Licence Detail Button is only displayed when the function has been selected via the Multi-Licence Option form. Selecting this Button will display all the Licences that have been multi-selected to have their Licence Type changed.

Current Licence Type
This field details the Current Licence Type and is full Description.

When maintain this function using the Multi-Licence Options form these two fields are not displayed as the Licence Type may be different on each of the Licences that have been selected to be updated.

Proposed Licence Type
This field allows the User to select a Licence Type that the Licence(s) will be changed to. The field will detail the new Type and its full Description. If the Licence Type is not known then the Pop Up button can be used to display a list of valid Types.

Load New Dimensions
Selecting this Option will Load any new Dimensions associated with the Proposed Licence Type. New Dimensions will be loaded, but any existing Dimensions remain against the Licence.

Load New Consents

Selecting this Option will Load any new Consents associated with the Proposed Licence Type. New Consents will be loaded, but any existing Consents remain against the Licence.

Load New Licence Fees

Selecting this Option will Load any new Licence Fees associated with the Proposed Licence Type. New Licence Fees will be loaded, but any existing Licence Fees remain against the Licence.

Load New Procedure

Selecting this Option will Load any new Procedures associated with the Proposed Licence Type. New Procedures will be loaded, but any existing Procedures remain against the Licence.

Delete Licence

A Licence may only be deleted if it has no Fees, Decisions or Consents against it.
If the User wishes to proceed with Deleting the Licence, and these Options are registered against the Licence they must be removed first. Any Fees must be reversed from the Licence and the appropriate action taken with any money received. Consents and Decisions need to be removed from the Licence.

Once the Options are no longer on the Licence, the User may then take the Delete Licence Option from the Licence Summary Screen.

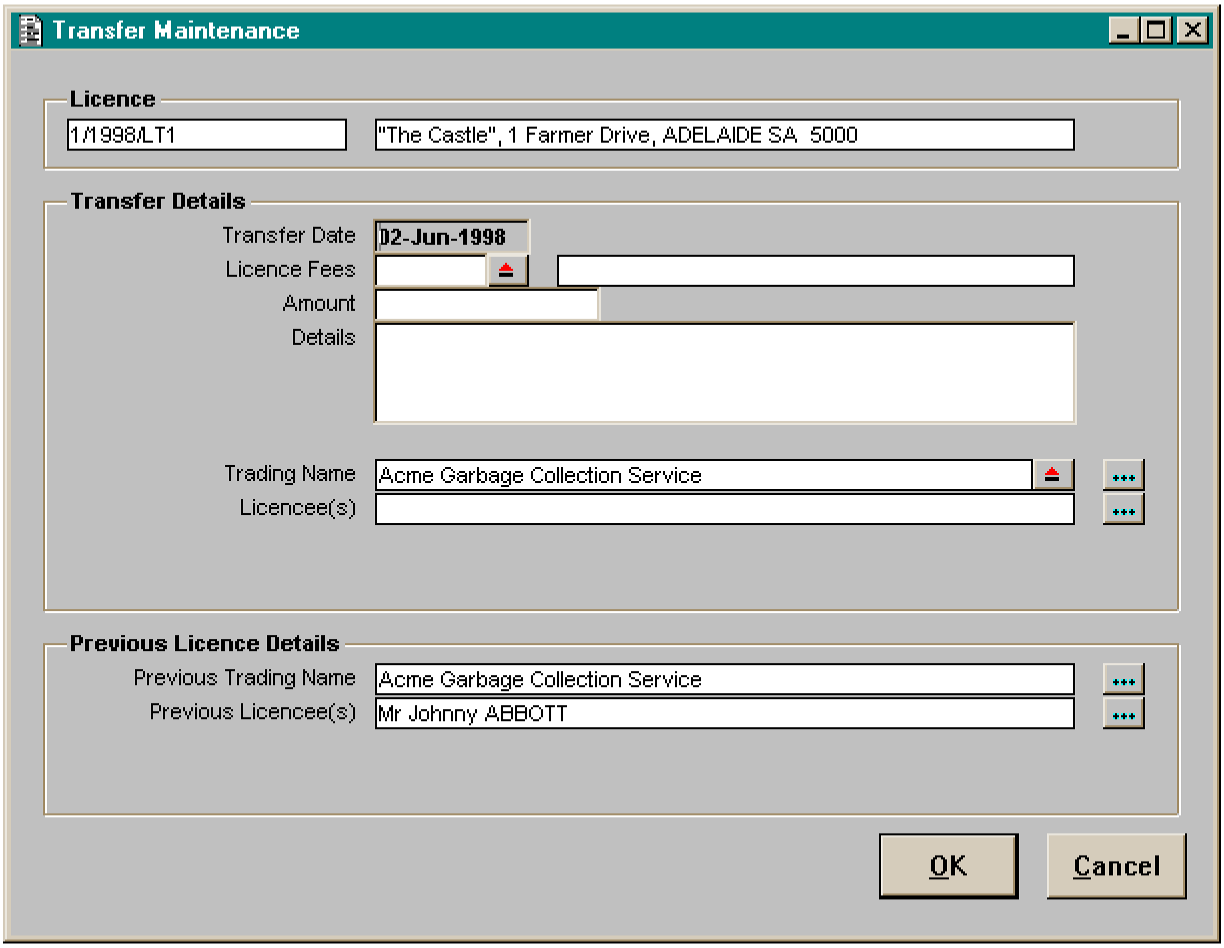
The User will be presented with a Warning Message asking if the User is sure they wish to remove the specific Licence Number.

Answering Yes to this question will result in the Licence being removed. Answering No to this question will return the User to the Option Form.

Transfers

Transfer Maintenance Form

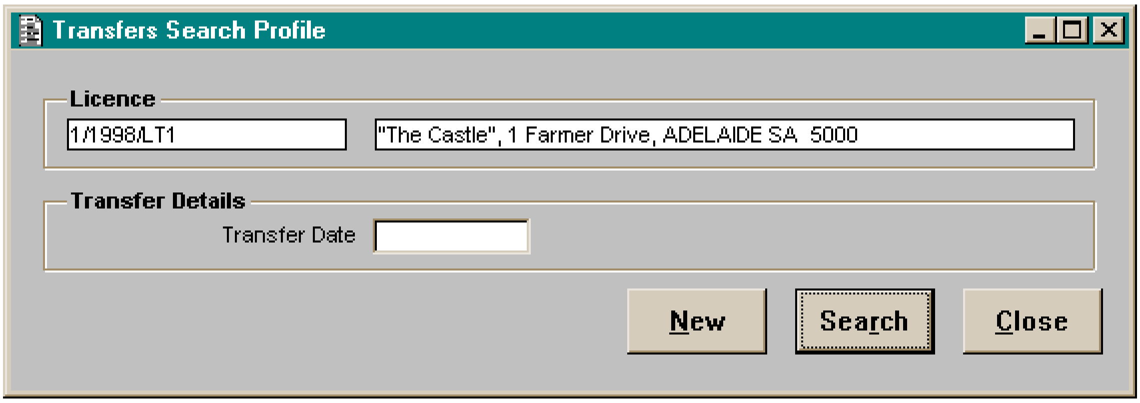
The Transfers Option allows the User to Transfer a Licence from one particular person to the other and modify such things as Trading Name and any other details required.
The Form consists of a Filter form, Selection Form if more than one transfer has been made and the Maintenance Form where the actual details are stored.



Transfer Maintenance Form

Transfers Search Profile Form

The Transfers Search Profile is designed to allow the User to Search for an existing Transfer. A Transfer date may be entered if known, or the Search button selected to make a full search. If a new Transfer is required, simply select the New button to have a new Maintenance Form presented for data entry.



Transfers Search Profile Form

Licence

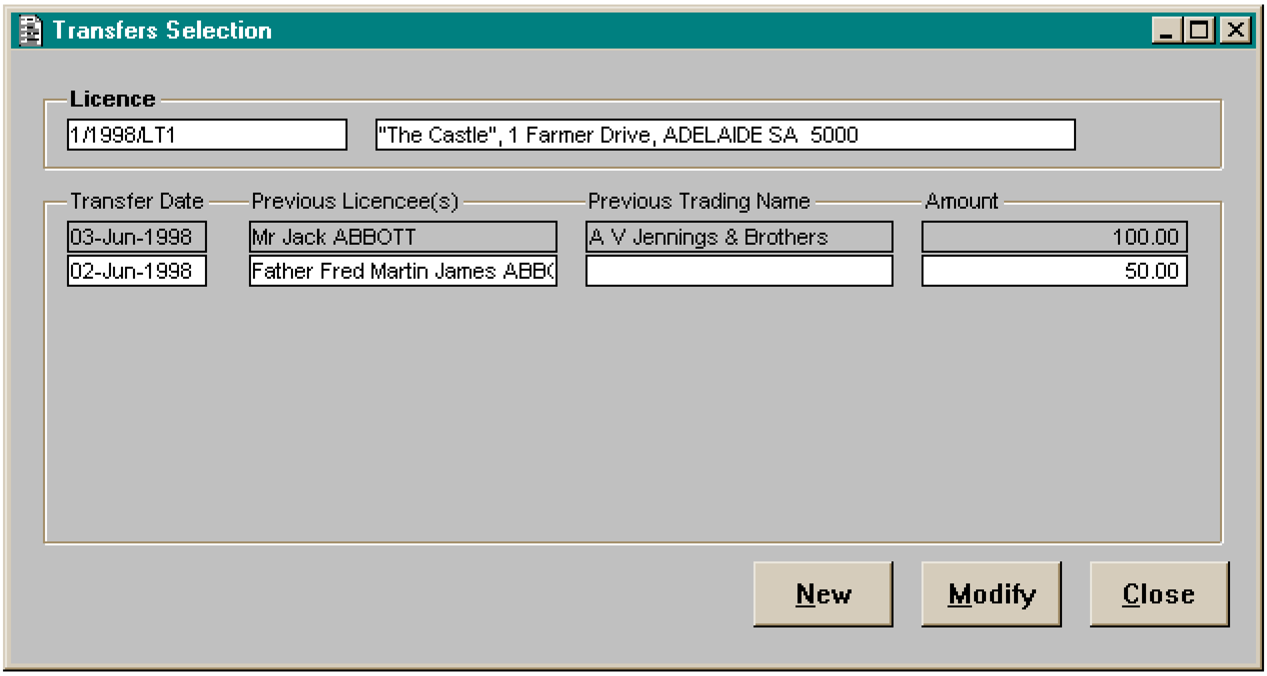
This field details the current Licence Number and the Location associated with the Licence.

Transfer Details - Transfer Date

This field allows the User to enter a Transfer date if known, followed by selecting the Search Button to begin the Search. Otherwise leave the date blank and select the Search Button to begin a full Search.

Transfers Selection Form

The Transfers Selection Form allow the User to either modify an existing Transfer, or select the New Button to add a new Transfer to this Licence.



Transfers Selection Form

Licence

The Licence Field details the Licence currently being accessed, and it's Location.

Transfer Date

This field details the date that the Transfer of the Licence was made.

Previous Licensee(s)

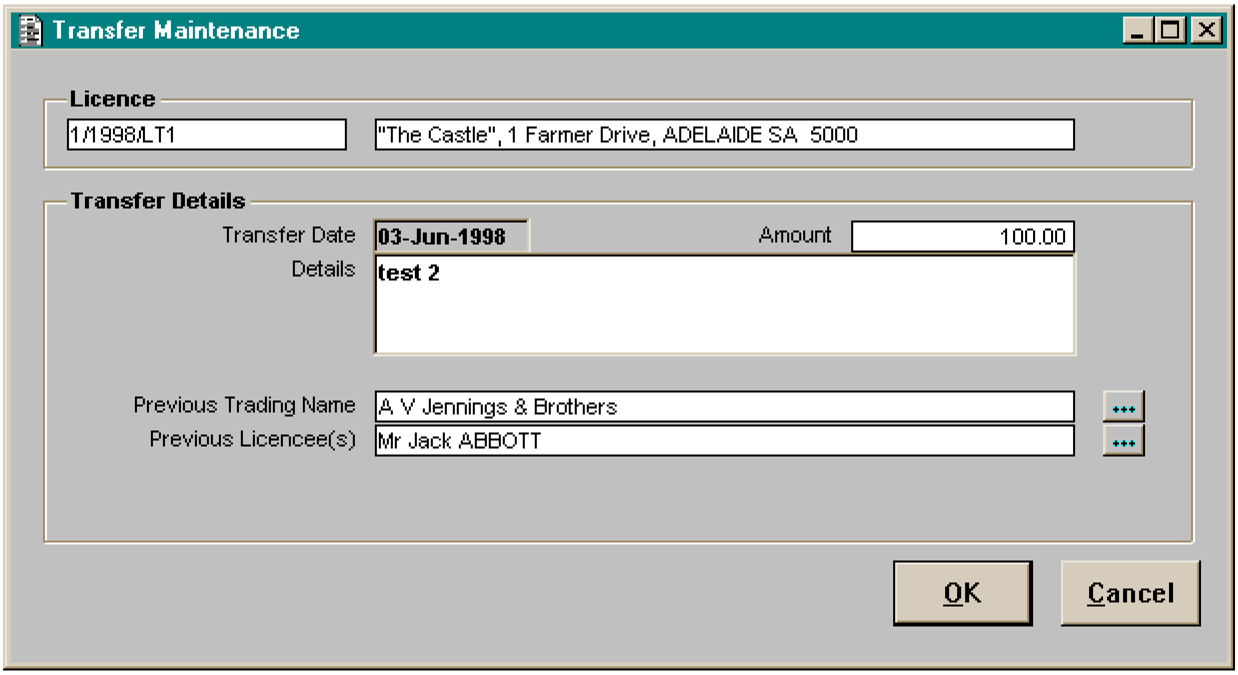
This field details the name of the Previous Licensee or Licensees.

Previous Trading Name
This field detail the name that was previously on the Licence as the Trading Name.

Amount
This field details the dollar value of fees that have been added to the Transfer.

Transfer Maintenance Form (Modifying an Existing Record)

This form is allows the User to view existing details of the Transfer. The only details that may be modified on the form are the date fields and the detail of the Licence Transfer.



Transfer Maintenance Form

Licence
This field details the actual Licence Number requiring a Transfer and its main Location.

Transfer Details - Transfer Date
This field allows the User to modify the Transfer date, this and the Details field as mentioned before are the only fields that are allowed to be modified on this form.

Transfer Details - Amount
This field displays the amount of the fee assigned to the Transfer. This field cannot be modified.

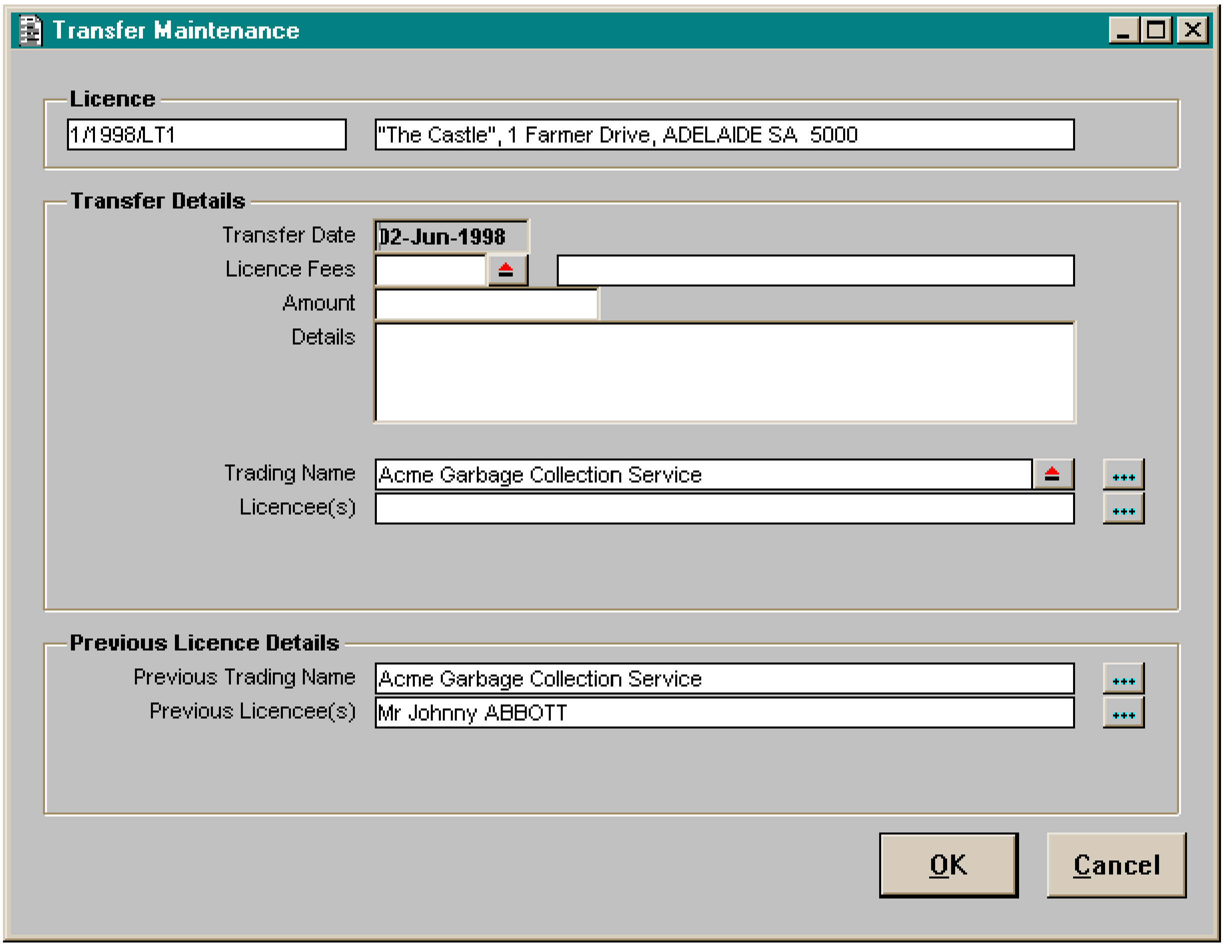
Details
This field displays any details entered against the Transfer. This field may be modified.

Previous Trading Name
This field may display the previous Trading Name associated with the Licence. The Detail button at the end of the line, may be selected to view the Name Maintenance form associated with the Trading Name. If the User has the appropriate authority, details may be modified on this form.

Previous Licensee
This field may display the previous Licensee(s) associated with the Licence. The Detail button at the end of the line may be selected to view the Name Maintenance form associated with the Licensee(s). If the User has the appropriate authority, details may be modified on this form.

Transfer Maintenance Form

The Transfer Maintenance form allows the User to transfer the Licence from one Licensee to another.



Transfer Maintenance Form

Licence
This field details the actual Licence Number requiring a Transfer and it's main Location.

Transfer Date
This field allows the User to enter a Transfer date. The field will automatically default to the current date, but may be modified. Double clicking in the field will invoke the calendar display. The User may then move forward or backwards for days and months.

Licence Fees
This field allows the User to enter a fee code that may be associated with the Transfer.

Licence Fee Pop Up
The Licence Pop Up fee button may used to select from a list of predefined Licence Fees. The User may highlight the appropriate fee, and press the select button. They will be then returned to the Transfer Maintenance form, with the fee displayed in the Licence Fee field.

Amount
This field will display the dollar value associated with the Licence Fee. This may be overwritten.

Details
This field allows the User to enter any details that they may wish to have recorded against the Transfer for future reference.

Trading Name

This field can display the Trading Name associated with this Licence. If a Trading name has already been associated with the Licence the name will already be displayed.
If no Trading Name has been associated, with the Licence, the User may select the Pop Up Button to choose from the Name Selection form. At this point the Detail Button will be dimmed, as no name is associated with the field.
Once a name has been selected, the detail button will no longer be dimmed and the User may go the particular Name Maintenance Form.

Licensee(s)

This field allows the enter the name of a Licensee or Licensees to be associated with this Licence Transfer. The User may enter a name if know, our use the detail button to select from the Name Selection form.

Previous Trading Name

This field will display the Previous Trading Name if one exists on the Licence. If there is no name associated, the detail button at the end of the form will be dimmed. If a Previous Trading Name exists, the detail button will be available for selection. If the User selects the detail button, they will be presented with the Names Maintenance Form.

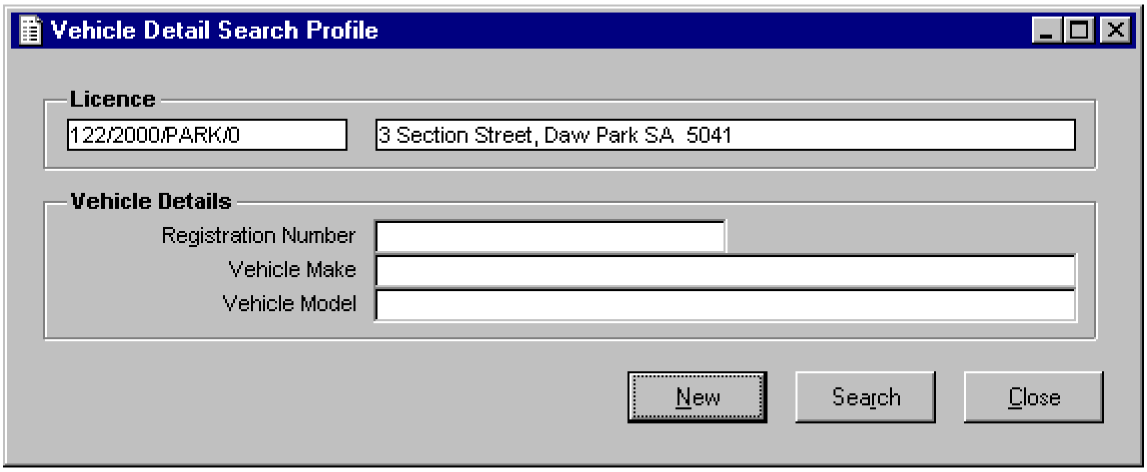
Previous Licensee(s)

This field will display the name(s) of the Previous Licensee(s). The User may if required use the detail button to view or modify the Name Maintenance Form.

Vehicle Maintenance

Vehicle Details Search Profile Form

Vehicle Maintenance allows the User to add details to a particular Licence to be able to issue Parking Permits.



Vehicle Details Search Profile Form

Licence
These two fields detail the Licence number and Location that is currently selected.

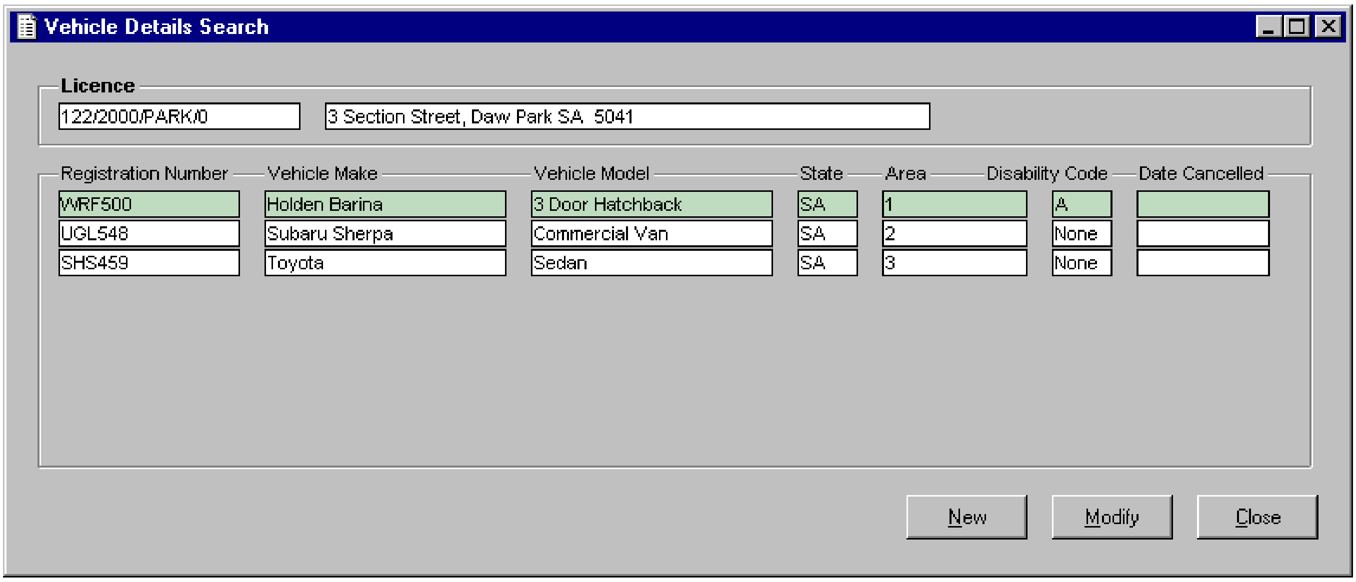
Vehicle Details - Registration Number
This field may be used to key the Registration Number if known either part of full using standard search keys.

Vehicle Details - Vehicle Make
This field may be used to key the Vehicle Make if known either part of full using the standard search keys. For example - Holden or Ford etc

Vehicle Details - Vehicle Model
This field allows the User to key the Vehicle Model to help with a search. For example:- Commodore or Corolla etc
Once search criteria is entered, the Search button may be selected to proceed with the Search. A brand new Vehicle Detail may be entered, by selecting the New button and the Vehicle Details Maintenance form will be displayed for data entry.

Vehicle Details Selection Form

The Vehicle Details Selection Form will display any previously entered Vehicle Details. This form allows the User to modify an existing record by highlighting the record required. The User may also create a New record from this form by selecting the New Button.
The form consists of the following fields:-



Vehicle Details Selection Form

Licence
These two fields detail the Licence number and Location that is currently selected.

Registration Number
This field details the Registration Number of previously entered Vehicle Details.

Vehicle Make
This field displays the Vehicle Make of previously entered Vehicle Details.

Vehicle Model
This field displays the Vehicle Model of previously entered Vehicle Details.

State
This field displays the State in which the vehicle is registered

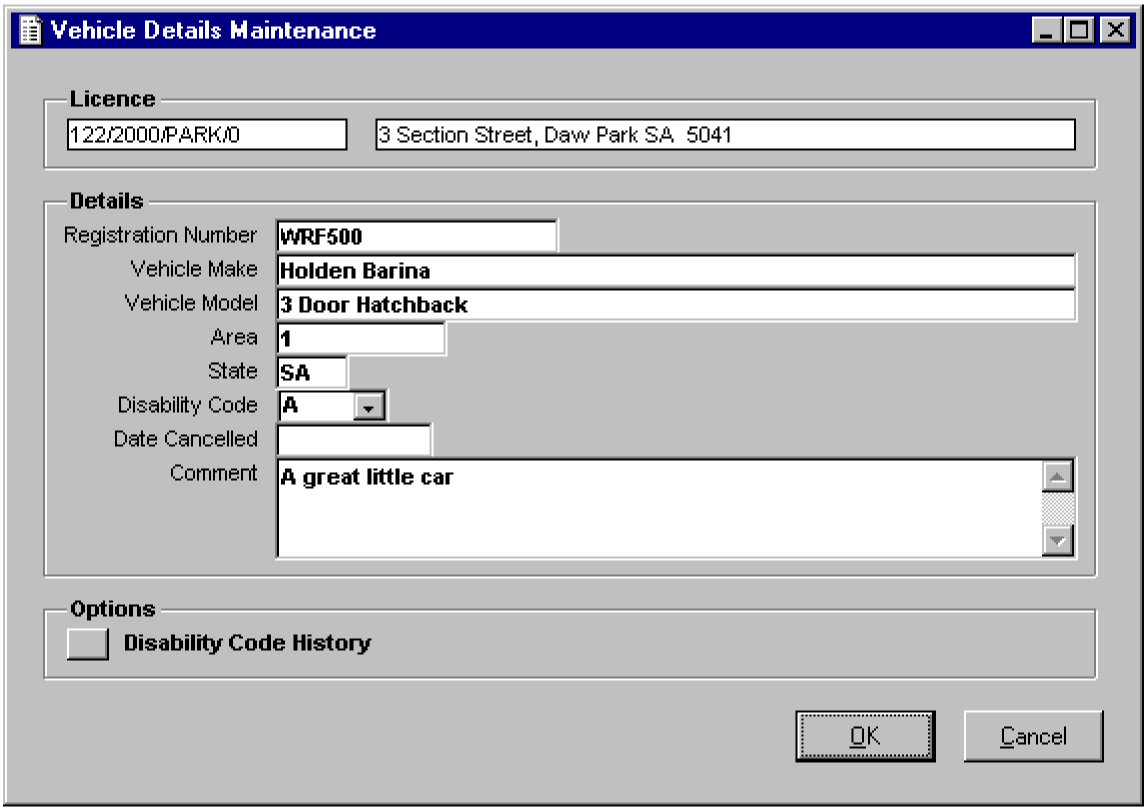
Area
This field displays the Area that Council has defined.

Disability Code
This field displays the Disability Code. The Disability Code is selected from a predefined list.

Date Cancelled
This field details the date that the details no longer apply to this Vehicle for the Purposes of the Permit.

Vehicle Details Maintenance Form

The Vehicle Detail Maintenance Form allows the User to enter the information required about the Vehicle, so that a Permit may be produced at a later date.



Vehicle Details Maintenance Form

Licence

These two fields detail the Licence number and Location that is currently selected.

Registration Number

This field may be used to key the Registration Number if known either part of full using standard search keys.

Vehicle Make

This field may be used to key the Vehicle Make if known either part of full using the standard search keys. For example - Holden or Ford etc

Vehicle Model

This field allows the User to key the Vehicle Model to help with a search. For example:- Commodore or Corolla etc

Area

This field allows the User to key in an Area Code as decided by Council.

State

This field allows the User to key in the State in which the vehicle is registered.

Disability Code

This field allows the User to select a Disability Code from a predefined drop down list.

Where a Vehicle Details record is modified at any time to change the Disability Code to a new code, a record of this will be added and the User will then see another option appear on the called Vehicle Detail History.

Date Cancelled

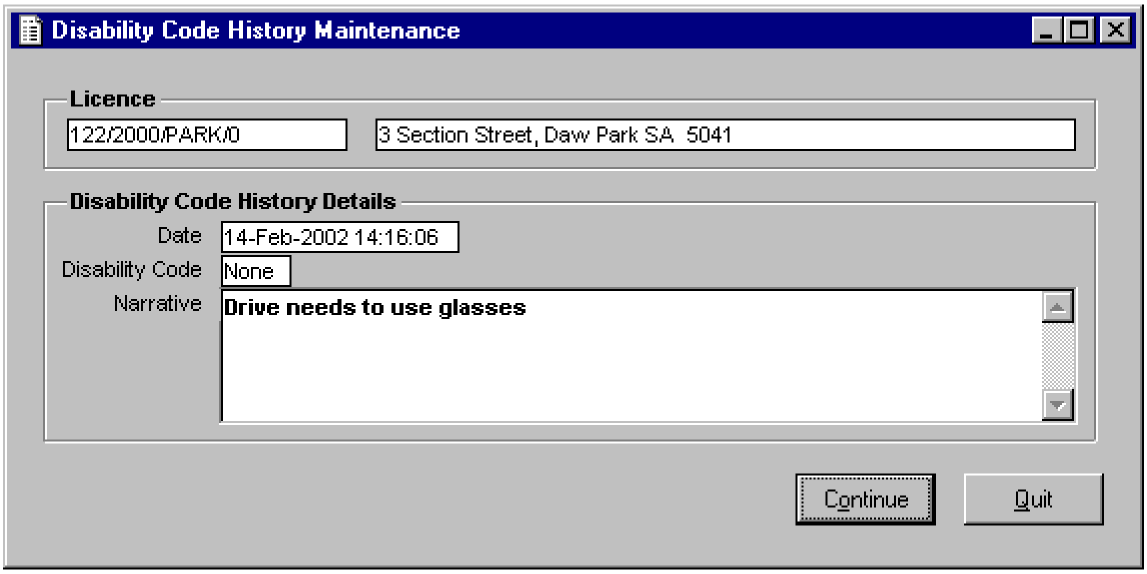
This field details the date that the details no longer apply to this Vehicle for the Purposes of the Permit.

Comment

This field allows the User to enter a detailed comment regarding the Vehicle Details and if necessary information regarding the cancelled date.

Disability Code History Maintenance Form

When a Disability Code is modified the Disability Code History Maintenance form is displayed. This will enable the User to enter details of why the Disability Code was modified.



Disability Code History Maintenance Form

Licence

These two fields detail the Licence number and Location that is currently selected.

Disability Code History Details – Date

This field displays the date that the Disability Code was modified and is system generated and may not be maintained.

Disability Code History Details – Disability Code

This field displays the Disability Code selected on the Vehicle Details Maintenance form and may not be maintained.

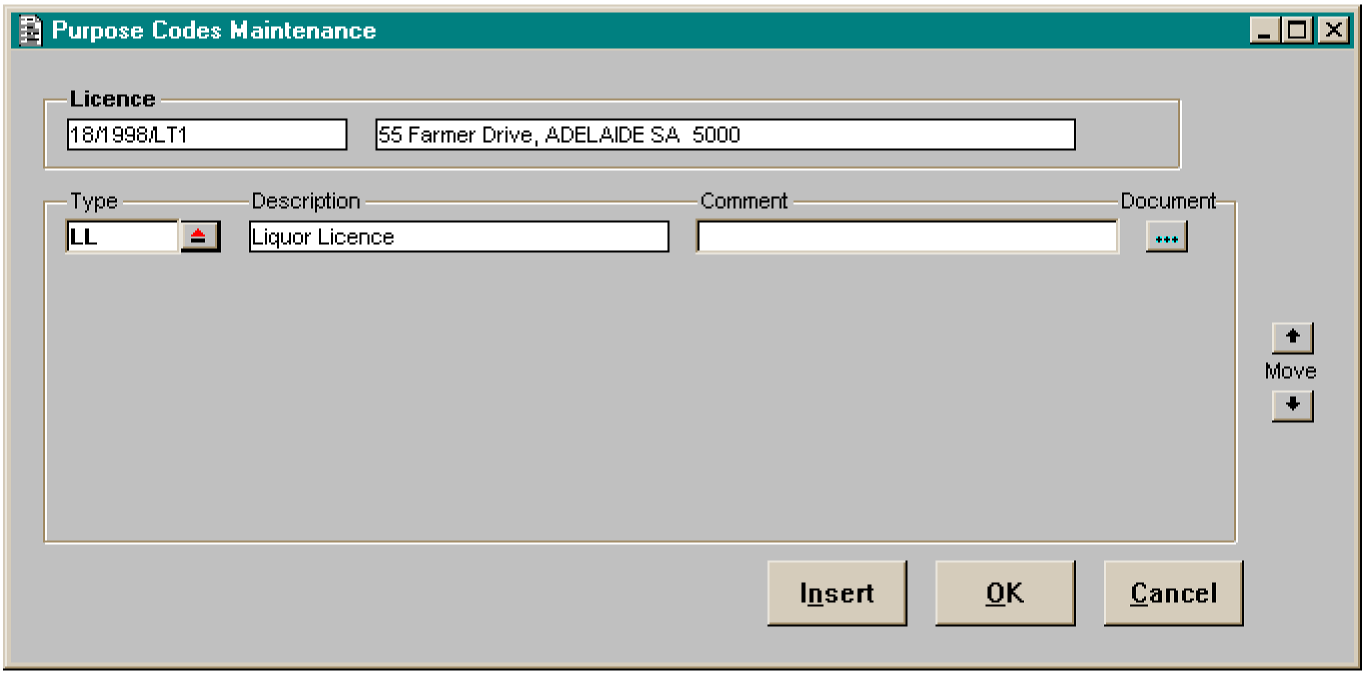
Disability Code History Details – Narrative

This field allows the User to enter a reason for the change of Disability Code.

Purpose Codes

Purpose Codes Maintenance Form

Purpose Codes allow the User to enter any particular codes that may be deemed necessary to add to the particular Licence currently working on.



Purpose Codes Maintenance Form

Licence
This field details the current Licence selected and it's full description.

Type
This field allows the User to enter a code that can be given to the Purpose Code. This field may be alpha numeric.

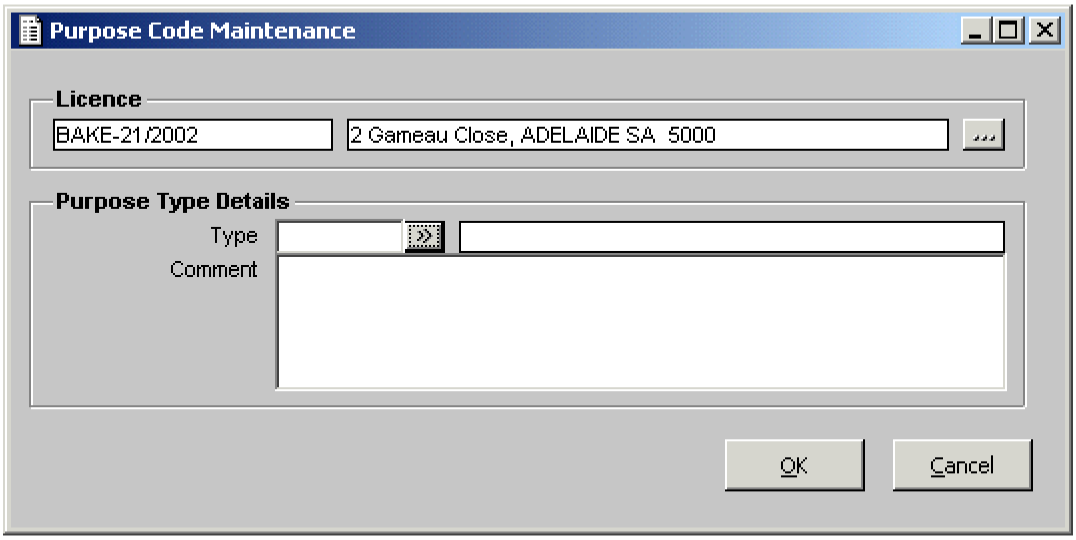
Description
This field details the full description that has been assigned to the Purpose Code Type.

Comment
This field allows the User to enter a free text format comment regarding the Purpose Code.

Document
If the User wishes to add a Word Processing document to the Purpose code, clicking on the detail button will open a Word Processing document for data entry. Once this has been keyed in, this document will be attached to the Purpose Code for later use if required.

Purpose Code Maintenance Form – Multi-Maintenance Options

Purpose Codes allow the User to enter any particular codes that may be deemed necessary to add to the selected Licences.



Purpose Code Maintenance Form - Multi-Maintenance Option

Licence

This field details the Licence and its Primary Location. A Detail Button is available for the User to display the Licences that have been selected to be updated with the Purpose Code information.

Type

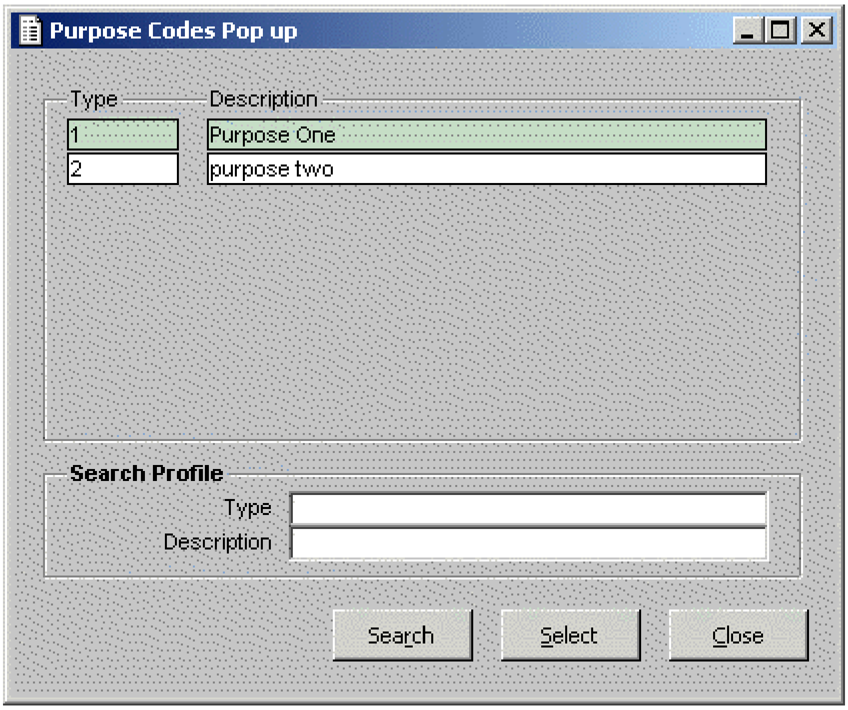
This field allows the User to enter the code given to the Purpose Code required. If the Purpose Code is not known then the Pop Up Button can be selected to display a list of valid Purpose Codes.

Comment

This field allows the User to enter a free text format comment regarding the Purpose Code.

Purpose Code Pop Up Form

The Purpose Code Pop Up displays all occurrences of predefined Purpose Codes and their full description.



Purpose Codes Pop Up Form

Type
This field details the Purpose Code.

Description
This field details the full Description of the Purpose Code.

Search Profile - Type
This field enables the User to enter a Type, click on the Search Button and search for their specified Criteria.

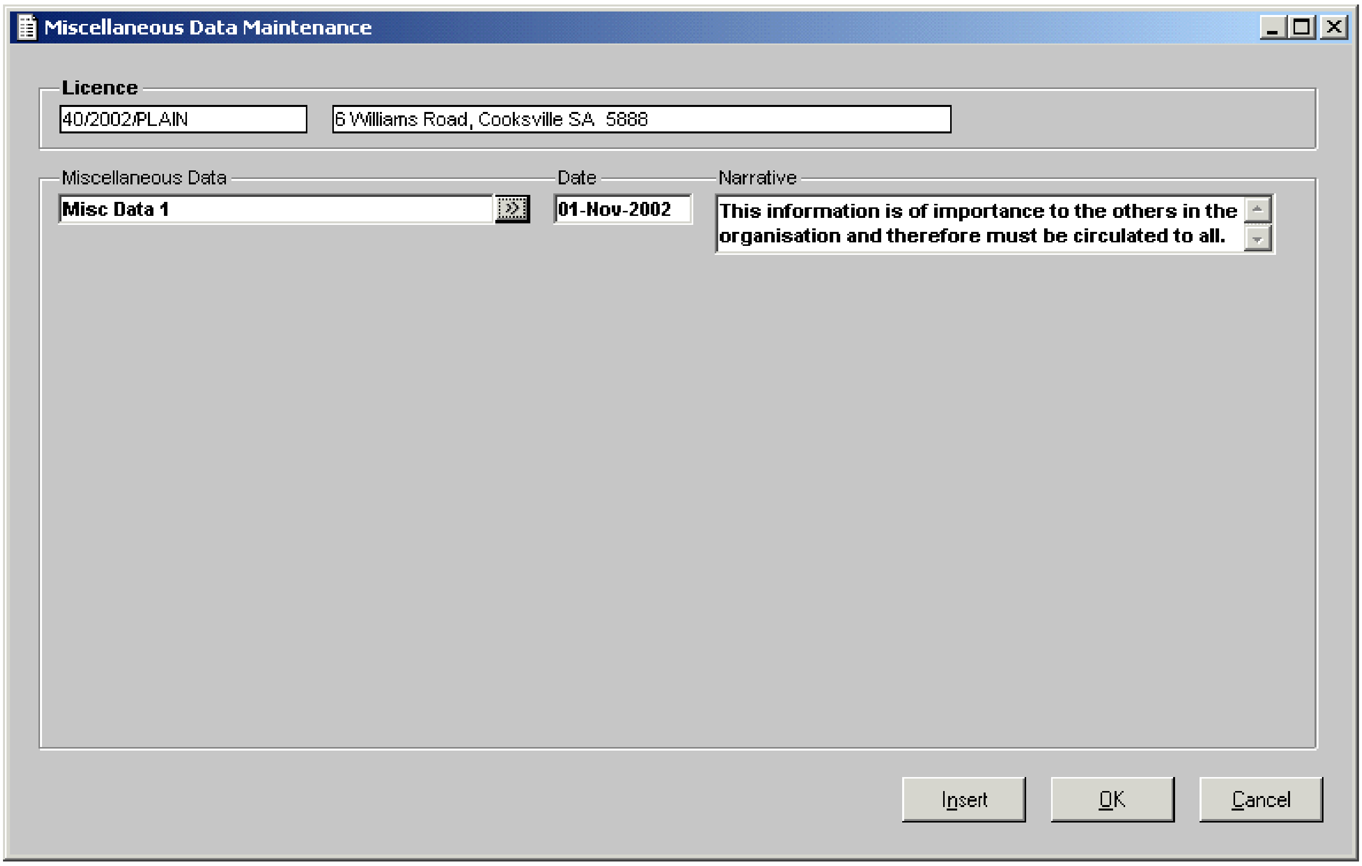
Search Profile - Description
This field enables the User to enter a Description, click on the Search Button and search for their specified Criteria.

Miscellaneous Data Maintenance

Miscellaneous Data Maintenance Form

The Miscellaneous Data Maintenance Form is used to add Information Fields that may be selected upon at a later date. These fields may be information that is relevant to Licences for the particular type of Licence or as a general field. A simple example of this may be: - Landscape Gardening Firm name. This may be required for some reason.

The same sequencing that has been defined within the Miscellaneous Data Parameters is used within the Miscellaneous Data Maintenance form. If an entry is entered into the Miscellaneous Data Maintenance form then when the User reselects the option the data will be sequenced as per the Parameter form.



Miscellaneous Data Maintenance Form

Licence

The Licence Fields are made up of two sections. The First being the actual Licence Number selected and the second being the location of the Licence.

Miscellaneous Data

This field is used to determine the actual name of the Field that may have a value added against it at a later date. EG Landscape Gardening Firm.. The Pop Up can be used to select the Miscellaneous Type.

Date

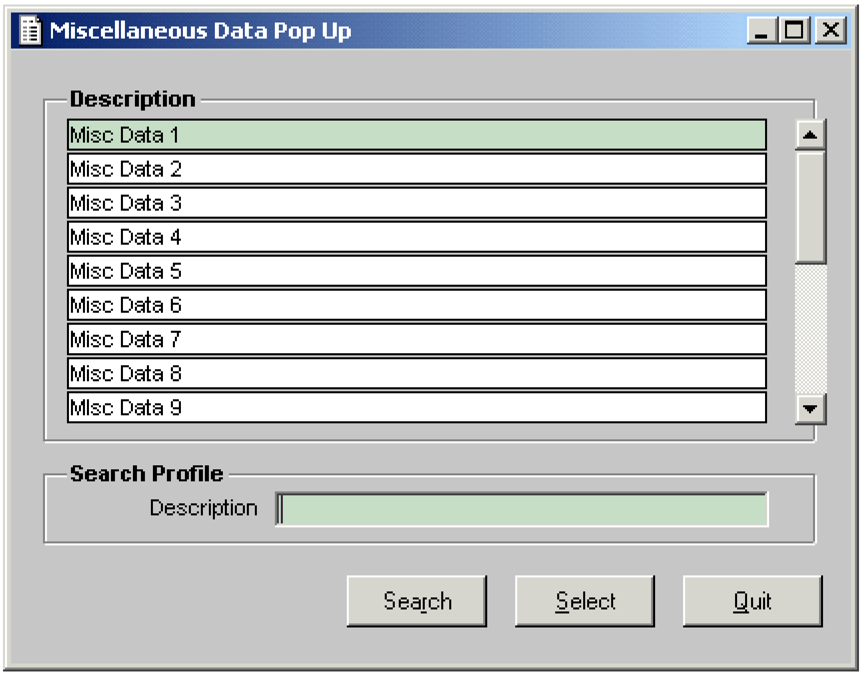
This field is used to enter the date the Miscellaneous Data is lodged on the Licence.

Narrative

The Narrative field allows unlimited information to be stored against a Miscellaneous Data Type.

Miscellaneous Data Pop Up Form

The Miscellaneous Data Pop Up Form is displayed when the Pop Up button has been selected from the Miscellaneous Data Maintenance Form. The Miscellaneous Data Types are defined within the Parameters.



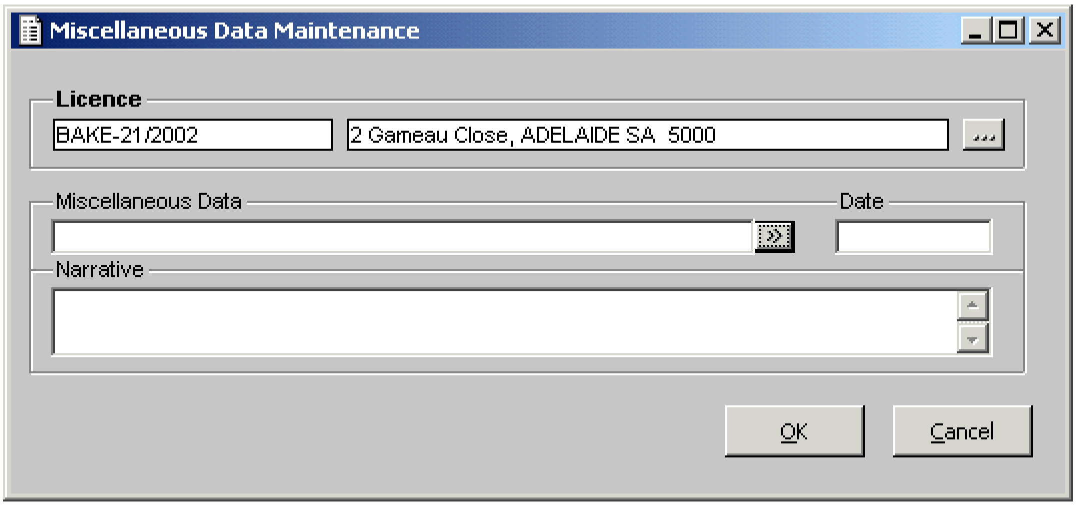
Miscellaneous Data Pop Up Form

Description
The Miscellaneous Data Pop Up Button is used to select pre-defined entries of Miscellaneous Data.

Search Profile - Description
The Search Profile may be used to key in a Description for Searching upon.

Miscellaneous Data Maintenance Form – Multi-Maintenance Option

The Miscellaneous Data Maintenance Form is used to add Information Fields that may be selected upon at a later date. These fields may be information that is relevant to Licences for the particular type of Licence or as a general field. A simple example of this may be: - Landscape Gardening Firm name. This may be required for some reason.



Miscellaneous Data Maintenance Form - Multi-Maintenance Option

Licence

The Licence Fields are made up of two sections. The First being the Licence Number selected and the second being the location of the Licence. A Detail Button is available to allow the User to display the Licences that have been selected to be updated with the Miscellaneous Data.

Miscellaneous Data

This field is used to determine the actual name of the Field that may have a value added against it at a later date. EG Landscape Gardening Firm. The Pop Up can be used to select the Miscellaneous Type.

Date

This field is used to enter the date the Miscellaneous Data is lodged on the Licences.

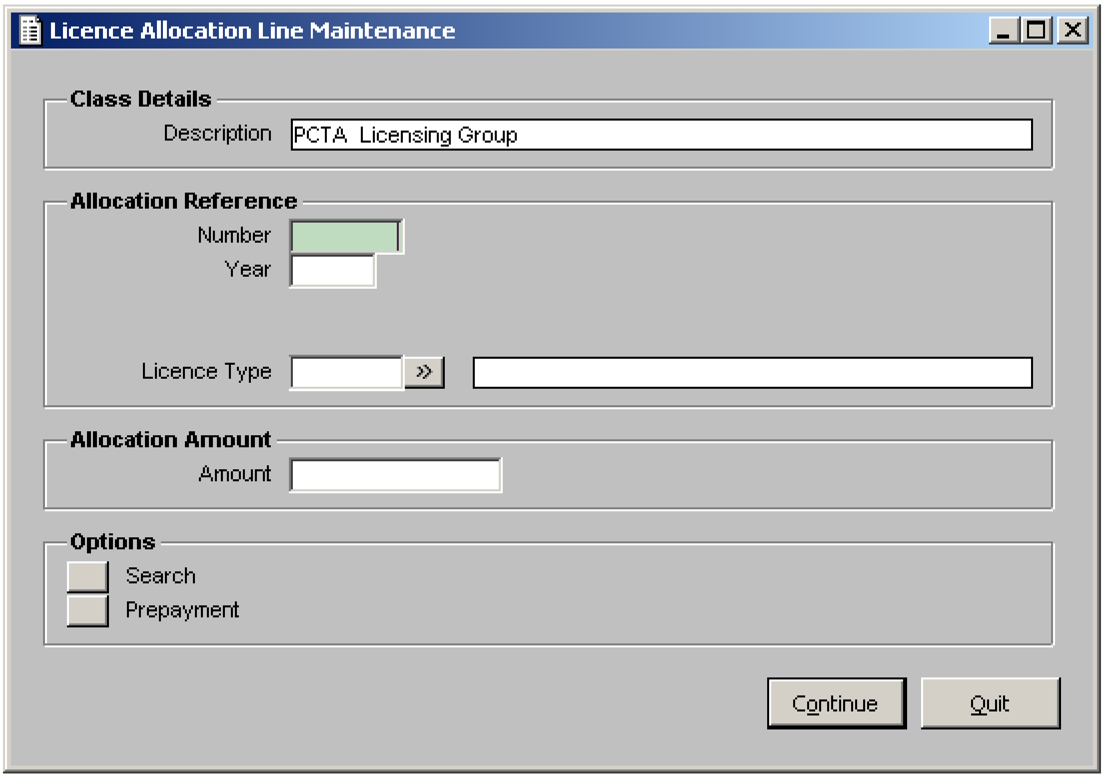
Narrative

The Narrative field allows unlimited information to be stored against a Miscellaneous Data Type.

Receipting Licences

Receipt Licence Allocation Line Form

This form allows the User to create a receipt allocated directly to a Licence. The form consists of the following fields.



Receipt Licence Allocation Line Form

Class Details
This field displays a description of the Licence Class.

Allocation Reference – Number
Enter the Licence Number if known.

Allocation Reference – Year
Enter the year of the Licence if known.

Allocation Reference – LicenceType
Enter the Licence Type Code, if known, or use the Pop Up to Select the required Code.

Allocation Amount
Enter the amount to be receipted

Options – Search
Selecting the Search Button will display the Application Search Profile Form.

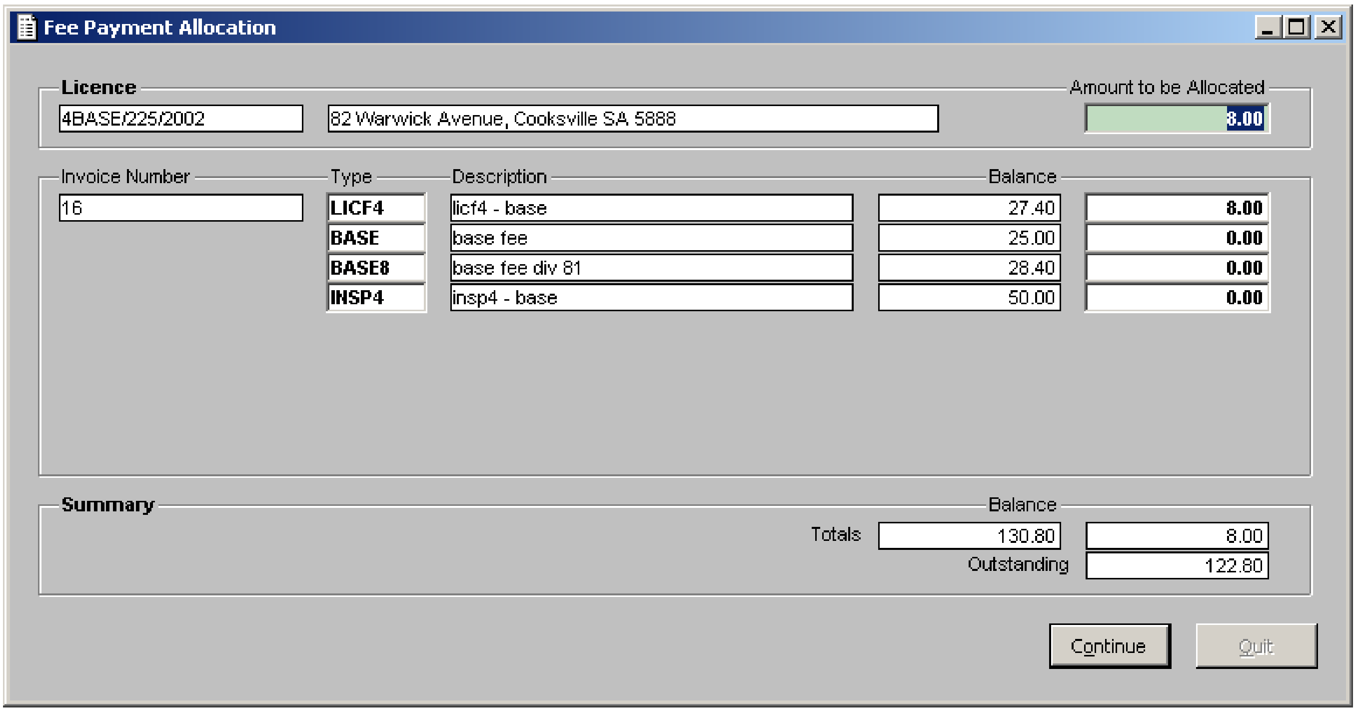
Options – Prepayment
Selecting the Prepayment Button will display the Pre Payments Maintenance Form.

Receipt Fee Payment Allocation Form

The Fee Payment Allocation Form displays when a Receipt Payment is being made for a Licence where the Amount being Paid is less than the Amount Outstanding for the Licence. This form can display during the following processes:

- Receipting to a Licence
- Allocation a Prepayment to a Licence

The form displays where the allocation is going to be performed and the User is able to modify this allocation process so that the amount is put against a different Type to that which the System was allocating to.



Receipt Fee Payment Allocation Form

Licence
The Licence Number and the Primary Location are shown in this area.

Amount to be Allocated
The Amount defaults to the value of the Receipt Amount or Prepayment Amount. This is then used to calculate out what is able to allocated. This amount can be changed for a Receipt Payment if not correct. However it can only be reduced down in the case of a Prepayment Allocation being done.

Invoice Number
The Invoice Number that has been assigned to the Fee is displayed in this field.

Type
The Type field displays the Fee Code of the Transaction.

Description
The Description of the Fee is displayed in this field.

Balance
The Balance Field displays the Outstanding Balance of the Fee. This has taken into account any payments that may have already been processed against this Fee.

Allocated Amount
The Allocated Amount field is used to enter in the amount that is to be Allocated to the Fee. Upon entering this form the System will have already worked out where it believes the allocations should go. The User is able to change these allocations if they are not what are required to occur.

Totals Balance
The Totals Balance Field represents the Total of the figures displayed in the Balance field against each Fee record.

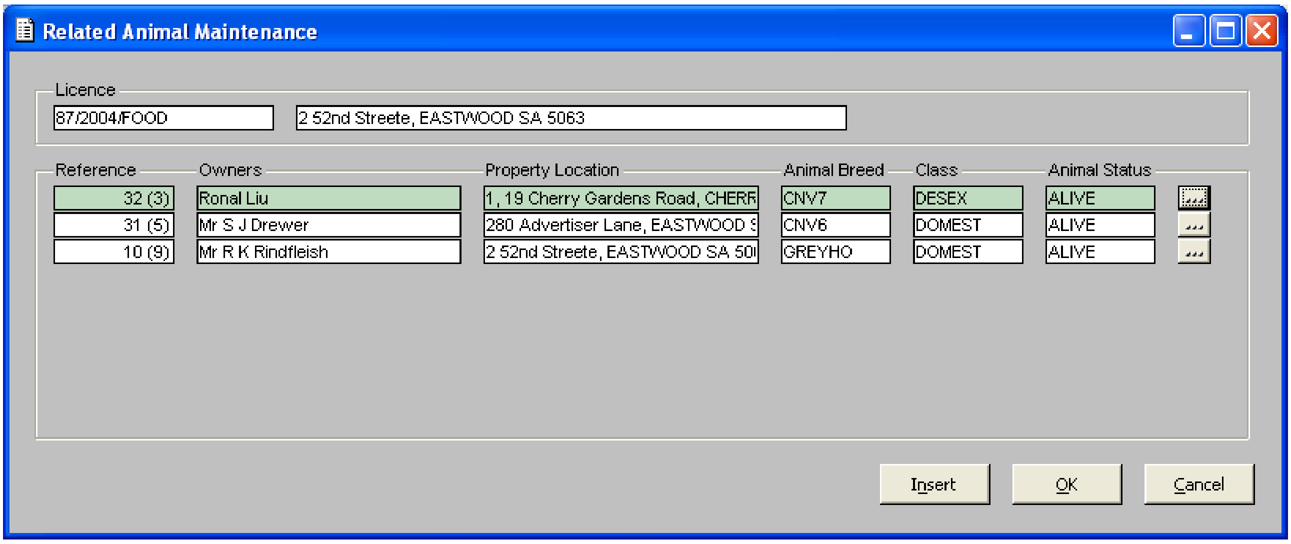
Totals Allocated
The Totals Allocated Field represents the Total of the figures entered against each Fee record.

Outstanding
The Outstanding Field represents the amount that will be Outstanding on the Application after the Allocation has been accepted.

Related Animal Maintenance

Related Animal Maintenance

The Related Animal Maintenance form displays when the Related Animals Option is selected from Licence Maintenance.



Related Animal Maintenance form

Licence Details
These fields form part of the header details showing the Licence Number and location.

Related Animal Details
The following fields display details of the Animal records related to the Licence

- Reference
- Owners
- Property LocationAnimal Breed
- Class Animal Status

A Detail button alongside each animal record allows the user to display further details of the Animal record.

An Insert button allows the user to relate additional Animal Records to the Licence.

Default Licensing Class

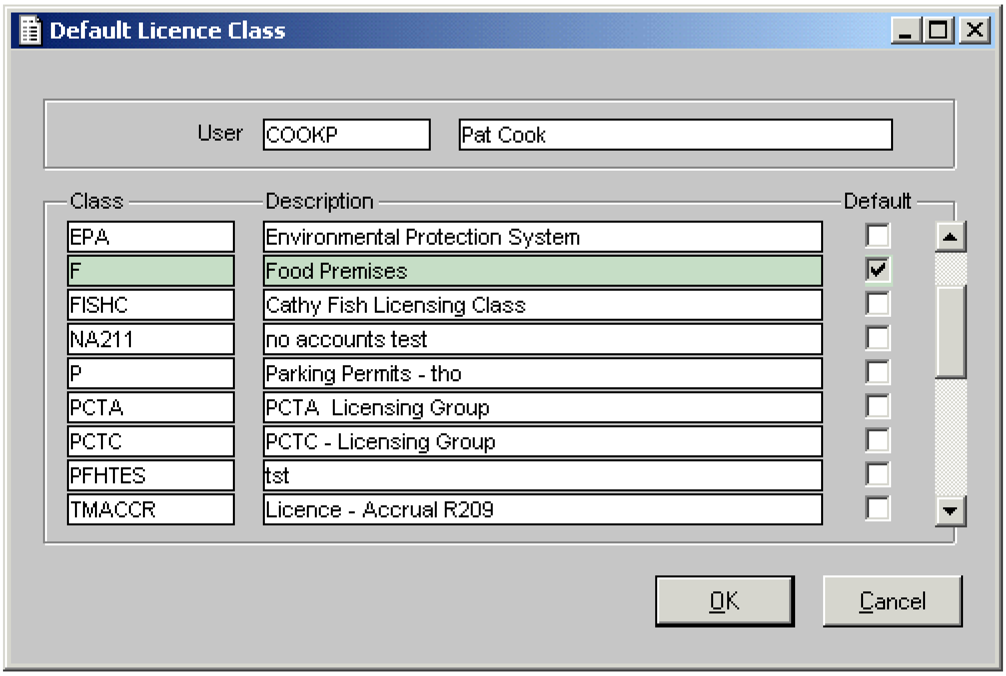
The following topic is covered in this section:

Default Licensing Class

Default Licensing Class Form

The Default Licensing Class function allows for the permanent setting of a Default Licensing Class. When a new session is started the Default Licensing Class is retained and there is no need for the User to have to reselect the Default Class again. The Default will remain until the User actually changes the Default.

As all Classes are displayed, if a Class is selected, that the User is not Authorised to, then the message “Not authorised to any Licensing Classes” is displayed when trying to access Maintenance / Parameters / Batch Functions.



Default Licensing Class Form

User
The User Id and Description are displayed in these fields for the User who is currently signed onto the session. These fields are no maintainable.

Class
The Class Code is displayed in this field. This field is non maintainable.

Description
The Description field contains the full Description of the Licensing Class. This field is no maintainable.

Default
Selecting the Default Box will nominate the Class next to it as the Class that is to be the Default Class for the User. If the Default Class is to be changed then simply click in the Box next to the new Class that is required as the Default. If no Default is required then simply click the Tick off in the Default Box.

Licence Enquiry

The following topic is covered in this section:

Licence Enquiry Function

Licence Enquiry Function

The Licence Enquiry Function is designed to allow access to the Licensing System without having the ability to modify any details of a Licence.

A Users Responsibility Structure and Options will dictate as to whether Maintenance functions of Licensing are available, or Enquiry Alone.

If the Users Responsibility Structure dictates that they may Enquire only on Licensing, then the Menu will only show the Licence Enquiry Button.

The Enquiry Function will allow the User to move through each of the Licensing Screens and view information regarding a particular aspect of the Licence, but will not allow them to make any specific changes to the Licence.

The Forms that the Users enter will look exactly the same as the Maintenance Forms, only the Buttons will differ. There will be no input capability to these forms.

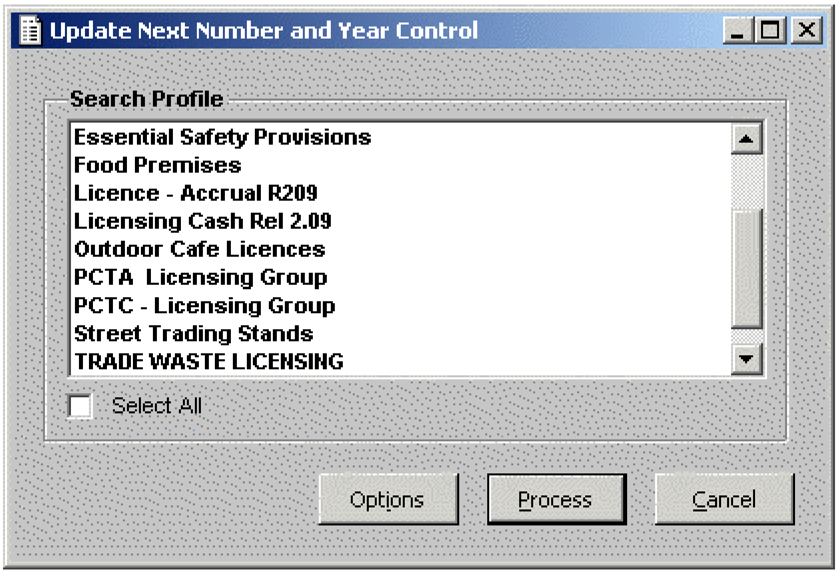
For Example:
- Modify buttons will be replaced with Display Buttons
- OK and Cancel Buttons will be replaced with a Close Button.

Reporting & Miscellaneous Functions

The following topics are covered in this section:

Update Next Number and Year

The Update Next Number and Year Option is designed to allow Licences to create a new Series of Numbers and adjust the Year as required. This would normally be run once per year. It can be run more often if required, depending on how the Numbering Codes have been established.



Update Next Number and Year Control Form

Search Profile
A Class should be selected and then the Processing Options chosen. This may be run Interactively, or Set as a pre-defined process.

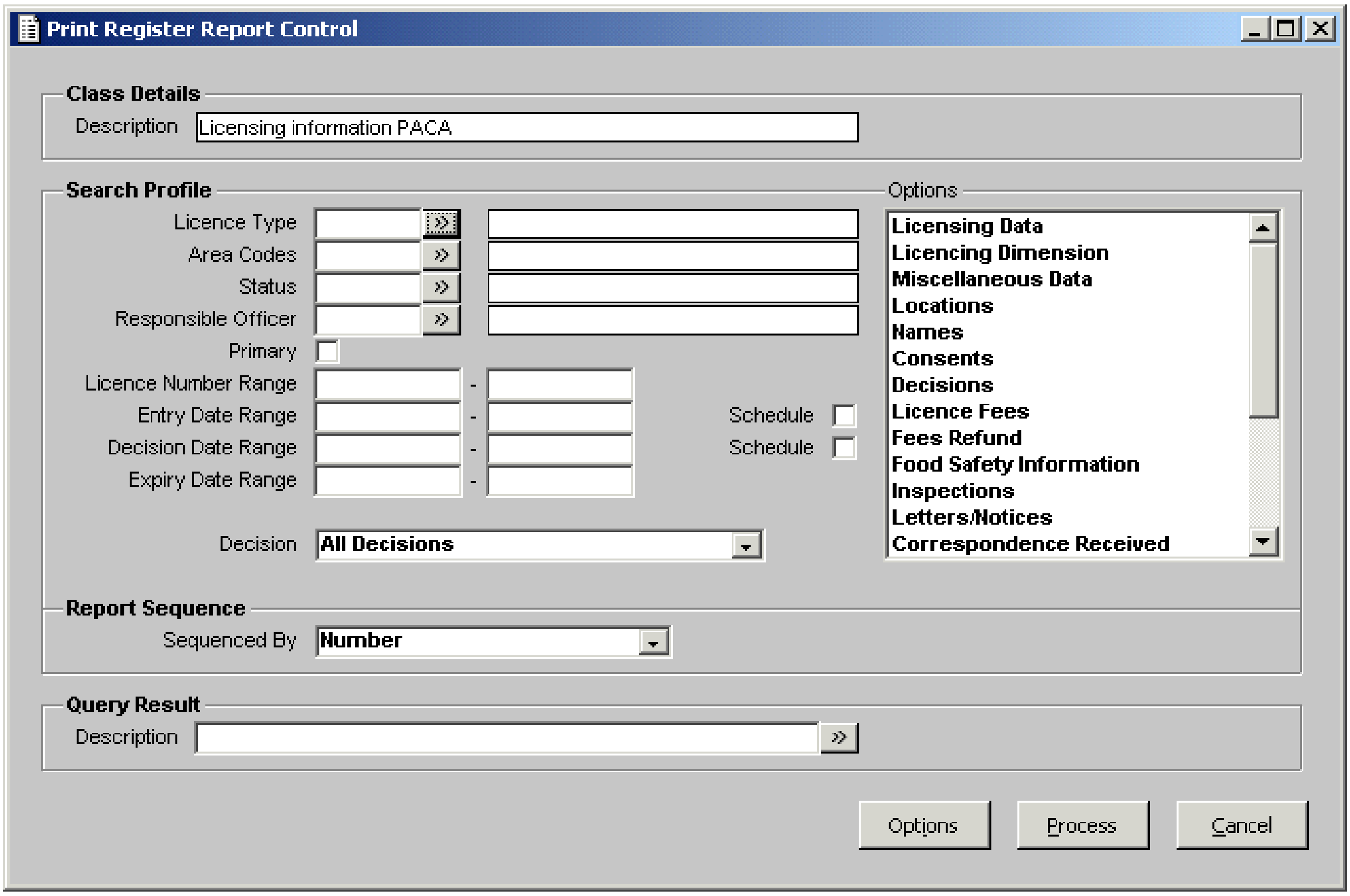
Select All Checkbox
If this box is checked on all classes are selected for processing. If the box is checked off the Classes must be manually selected. A single class or a combination of classes may be selected.

Print Register Report

Register Report Control Form

The Register Report allow the User to create a report based on specific criteria entered. Several fields may be chosen as part of this criteria. The Report may be generated instantly as an interactive report, or may scheduled as part of an End of Day process. It may also be set as a permanent End of Day, or a specifically timed Report.

Details on Scheduling this Report as a Permanent End of Day, or specifically timed Report, may be found in the Batch Processing Manual.



Register Report Control Form

Class Details - Description
This field details the current class that is selected.

Search Profile - Licence Type

The Licence Type is used to select the particular Licence Type required for this Report Selection.
The Licence Type Pop Up Button may be used to select a particular Licence Type if the Licence Type Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Type and Click OK. The Register Report Screen will be returned to continue selections.

Search Profile - Area Codes

The Area Codes is used to select the particular Area Codes required for this Report Selection.

The Area Codes Pop Up Button may be used to select a particular Area Codes if the Area Codes Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Area Codes and Click OK. The Register Report Screen will be returned to continue selections.

Search Profile - Status

The Class Field is used to select the particular Class of Licence required for this Report Selection.

The Status Pop Up Button may be used to select a particular Status if the Status Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Status and Click OK. The Register Report Screen will be returned to continue selections.

Search Profile – Responsible Officer

The Responsible Officer Field is used to select the particular Responsible Officer required for this Report Selection.

The Responsible Officer Pop Up Button may be used to select a particular Responsible Officer if the Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Type and Click OK. The Register Report Screen will be returned to continue selections.

Search Profile – Primary

The Primary Flag is used in conjunction with the Responsible Officer field. As it is possible to have more than one Responsible Officer assigned to an Application, the Primary Flag can be set so that only the one Responsible Officer who has been nominated as the Primary Officer will be reported on.

Search Profile - Licence Number Range

The Licence Number Range may be used to select a particular “from” and “to” range of Licensing required for Reporting on. Enter a number in the first field and tab to the second field to enter a “to” number.

Search Profile - Licence Entry Date Range

The Licence Entry Date Range may be used to select a particular “from” and “to” range of Licence Entry Dates required for Reporting on. Enter a number in the first field and tab to the second field to enter a “to” number.

Search Profile - Decision Date Range

The Decision Date Range may be used to select a particular “from” and “to” range of Decision Dates required for Reporting on. Enter a number in the first field and tab to the second field to enter a “to” number.

Search Profile - Expiry Date Range

The Expiry Date Range may be used to select a particular “from” and “to” range of Expiry Dates required for Reporting on. Enter a date in the first field and tab to the second field to enter a “to” date.

Search Profile - Decisions

The Decision Field allows the User to selected from a predefined list of Licence Decisions. The Option chosen will determine which type of Licence will appear on the Register Report. The drop down menu provides for the selection of the following decisions:

- Approval
- Rejection
- Neither
- All
- No Decision

Report Sequence - Sequenced By

The Report Sequence Option allows the User to select form a list of predefined Sequences. Once selected this Sequence will determine how the Report will be structured. The available list of sequences are:

- Number
- Suburb/Street House Number
- Responsibility Group/Number
- Type/Number
- Property/Ward Number
- Processing Group/Number
- Processing Group/Type/Number

Search Profile - Options

Options may be selected to be included in the Register Report. The Standard Windows use of Shift, or Control keys may be used to include multiple entries of the options.

Licence Data

If Licence Data Information is required to be included with this Report, this check box must be checked.

Licence Fees

If Licence Fee Information is required to be included with this Report, this check box must be checked.

Consents

If Consents Information is required to be included with this Report, this check box must be checked.

Schedule

The form has two Schedule Check boxes to allow the User to check which option is required for Scheduling. The two options being Lodgement Date ranges and Decision Date Ranges. These may be Scheduled so that the Report may include these specific date ranges at the required time.

Query Result

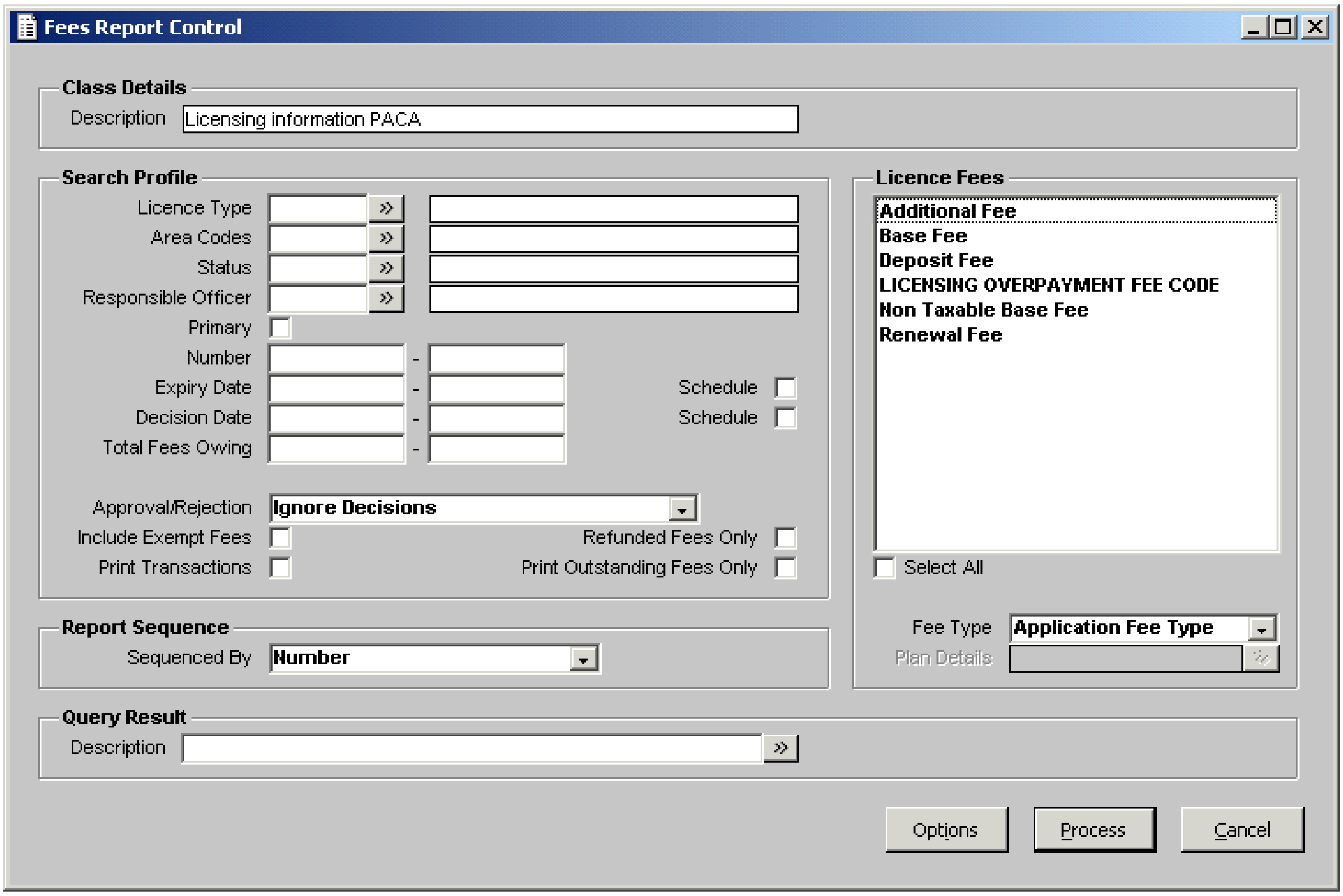
The Query Result Field may used to enter a Query definition for this Report. The Pop Up Button may be selected to choose from a pre-defined range of Queries.

Once all details required are entered in the Appropriate fields, the Process button may be selected to Proceed with Printing the Report, or the Options Button may be selected to select a predefined Report Option. The Processing and Options Buttons are fully documented in the Batch Printing Manual.

Fees Report

Fees Control Report Form

The Fees Report allow the User to create a report based on specific criteria entered. Several fields may be chosen as part of this criteria. The Report may be generated instantly as an interactive report, or may schedule as part of an End of Day process. It may also be set as a permanent End of Day, or a specifically timed Report. The report can also be used to report on any Licences that have been overpaid.



Fees Control Report Form

Class Details - Description

This field details the current class that is selected.

Search Profile - Licence Type

The Licence Type is used to select the particular Licence Type required for this Report Selection.

The Licence Type Pop Up Button may be used to select a particular Licence Type if the Licence Type Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Type and Click OK. The Register Report Screen will be returned to continue selections.

Search Profile - Area Codes

The Area Codes is used to select the particular Area Codes required for this Report Selection.

The Area Codes Pop Up Button may be used to select a particular Area Codes if the Area Codes Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Area Codes and Click OK. The Register Report Screen will be returned to continue selections.

Search Profile - Status

The Class Field is used to select the particular Class of Licence required for this Report Selection.

The Status Pop Up Button may be used to select a particular Status if the Status Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Status and Click OK. The Register Report Screen will be returned to continue selections.

Search Profile – Responsible Officer

The Responsible Officer Field is used to select the particular Responsible Officer required for this Report Selection.

The Responsible Officer Pop Up Button may be used to select a particular Responsible Officer if the Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Type and Click OK. The Register Report Screen will be returned to continue selections.

Search Profile – Primary

The Primary Flag is used in conjunction with the Responsible Officer field. As it is possible to have more than one Responsible Officer assigned to an Application, the Primary Flag can be set so that only the one Responsible Officer who has been nominated as the Primary Officer will be reported on.

Licence Number Range

The Licence Number Range may be used to select a particular “from” and “to” range of Licensing required for Reporting on. Enter a number in the first field and tab to the second field to enter a “to” number.

Licence Entry Date Range

The Licence Entry Date Range may be used to select a particular “from” and “to” range of Licence Entry Dates required for Reporting on. Enter a number in the first field and tab to the second field to enter a “to” number.

Decision Date Range

The Decision Date Range may be used to select a particular “from” and “to” range of Decision Dates required for Reporting on. Enter a number in the first field and tab to the second field to enter a “to” number.

Total Fees Owing Range

The Total Fees Owing Range may be used to select a particular “from” and “to” range of Fees Owing required for Reporting on. Enter a value in the first field and tab to the second field to enter a “to” value.

Approval Rejection

This field may be used to enter and Approval or Rejection Code. A drop down button is provided to select from a pre-defined range.
The predefined Range options are:

- Approval
- Rejection
- Neither
- All
- No Decision
- Ignore Decision

Report Sequence

This field may be used to enter a Report Sequence. A drop down button is provided to select from a pre-defined range.
The predefined Sequence options are:

- Number
- Suburb/Street House Number
- Responsibility Group/Number
- Type/Number
- Property/Ward No
- Processing Group/Number

- Processing Group/Type/Number

Print Outstanding Fees Only
To have only Outstanding Fees included in the Report, this box must be checked on.

Refunded Fees Only
To have Refunded Fees only included in the Report, this box must be checked on.

Include Exempt Fees
To have Exempt Fees included in the Report, this box must be checked on.

Print Transactions
To have Transactions included in the Report, this box must be checked on.

Licence Fees
This field contains the available list of Licence Fees. This may be selected as criteria for the Report. This field is multi-selectable. Click on one field and either use the shift or control keys to select other Licence Fees for inclusion in the Report. By selecting the Overpayments Fee it will report on those Licences that have Overpayments.

Query Result
The Query Result Field may used to enter a Query definition for this Report. The Pop Up Button may be selected to choose from a pre-defined range of Queries.

Clicking the Process Button will begin the Reporting Process. Clicking the Option Button will allow the selection of a pre-defined list of Processing Parameters.

Batch Print Licensing Letters

This Button is used to select all Licence Letters that have previously been set to Print as Batched. This is typically done, when numerous letters are created at the one time, and wish to be printed at a later date. The Batch Print Option allows for the Selected letters to be printed either on Request or at the End of Day Processing.
Details on Batch Processing may be found in the Word Processing /Batch Processing Manuals.

Bulk Fees Transfer

The Bulk Fees Transfer option allows for the updating of Fees with a status of 'Awaiting Transfer to Debtors' to be updated onto the appropriate Debtor using a Bulk function. Additionally, Invoices can be produced for these fees that are transferred.

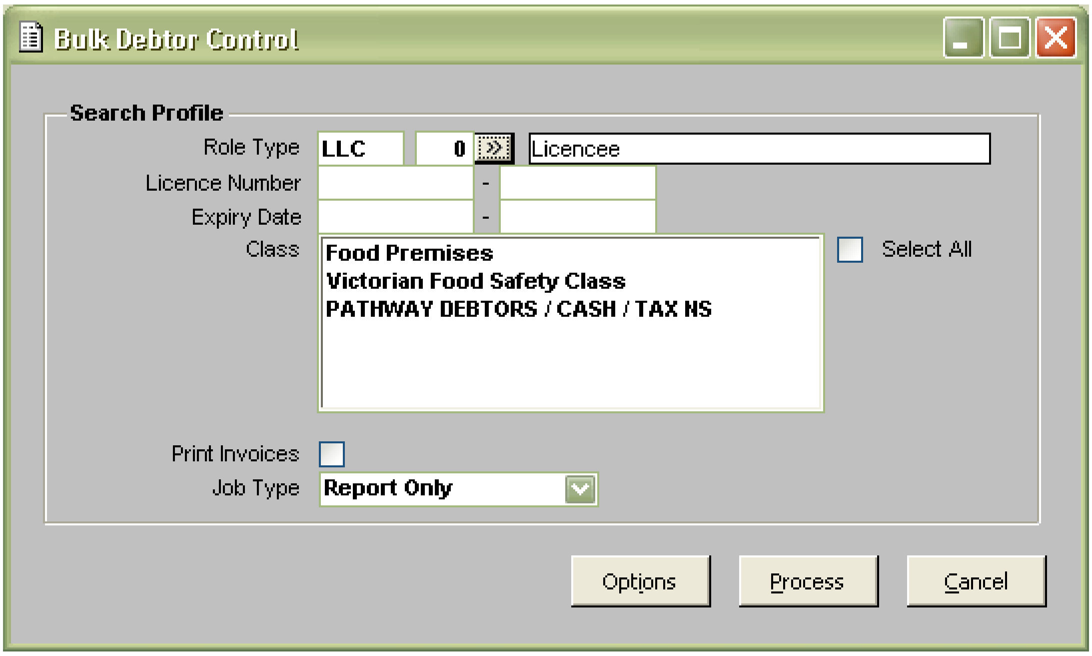
Bulk Debtor Control Form

The Bulk Debtor Control allows for the selection of the required Role Type that is to be used when updating the Fees that have a status of 'Awaiting Transfer to Debtors'. The display also allows for the refining of the criteria by use of the Licence Number, Expiry Date and Class fields. Additionally, the Print Invoices option can be flagged on to produce Invoices for those Fees that are updated and transferred to Debtors.

NOTE: This process is to be used for newly added Licences that have NOT initially been transferred to Debtors. The menu is not to be used as an ongoing process to update the Debtors Module with information regarding ongoing maintenance of existing Licences. The update does not process Credit Notes, Adjustments or Amendments for Fees and therefore is only designed for newly added Licences.

The process works in the following way:-

- It finds the relevant Class and Type of Licences that have a Debtor selected that has fees assigned that are 'Awaiting Transfer to Debtors'
- Where a valid Debtor number is found against the nominated Role Type, Fees will be transferred to the Debtors module, the status of these Fees are updated to 'Transferred to Debtors' and if nominated produce an Invoice using the Merge Type nominated in the System Parameters. A record that the Invoice has been produced is created via the standard Letters Option
- Where there was an invalid Debtor or multiple Names recorded against the nominated Role Type then these are not processed and appear on the Exception Report informing of the error.



Bulk Debtor Control Form

Role Type

The Role Type to be used for the update function is nominated in this field. This will automatically default to LLC 0 if the field is tabbed over and use the Licencee Role Type. Enter in the required Role Number (if known and different to the Licencee) or use the Pop Up to display a list of Role Types.

Licence Number

The Licence Number range can be used to filter the process over a particular range of Licence Numbers. This field can be left blank or used in conjunction with the Expiry Date field if required.

Expiry Date

The Licence Expiry Date range can be used to filter the process over a particular range of Licences by Expiry Date. This field can be left blank or used in conjunction with the Licence Number field if required.

Class

A list of Classes authorised to use the Bulk Generation process are shown and can be selected for the process. Highlight the required Class to be processed. Multiple Classes can be selected.

Select All

The Select All option when flagged On will highlight all the Classes listed in the Class area of the display. Flagging the field OFF will deselect all the Classes.

Print Invoices

This field is used to indicate to the process whether Invoices are to be produced when the Fees are transferred to Debtors. Flagging this field ON will produce an Invoice for each Licence / Debtor / Transferred Fees processed.

If the field is flagged OFF then the process will still transfer the Fees but an Invoice is not produced.

Job Type

The Job Type defaults to Report Only but can be changed to Update and Report. When the process is run in Report Only then the Exception Report is produced but no Fees or Invoices are updated. Update and Report will transfer Fees, produce Invoices (if nominated) and provide the Exception Report.

Bulk Invoices Print

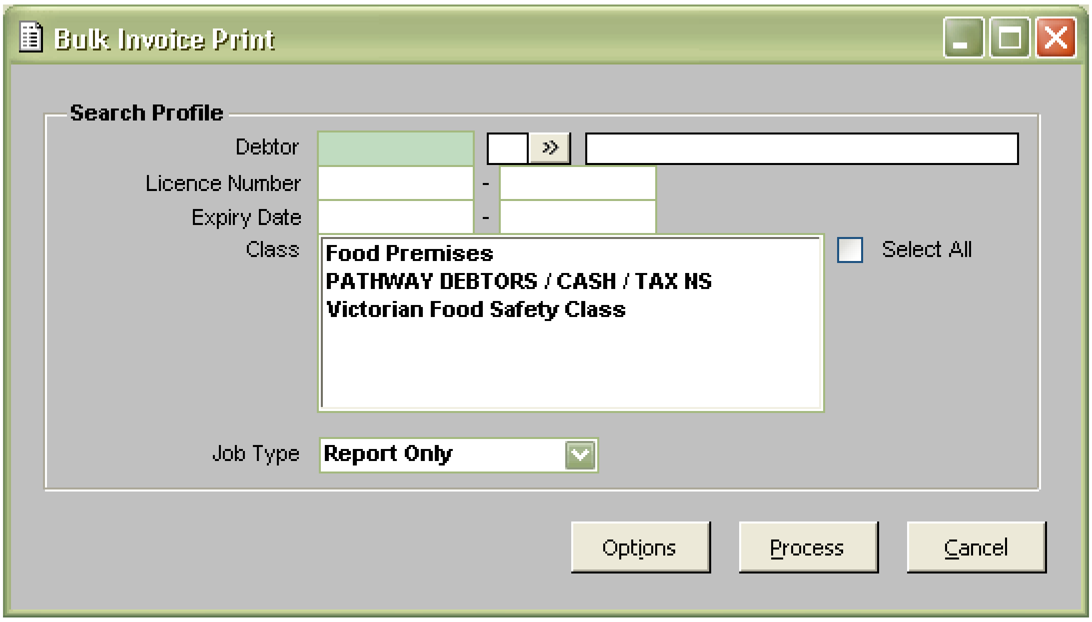
The Bulk Invoices Print option allows for the creation of an Invoice for Licenses that fall into the nominated selection criteria. The criteria can from an individual Debtor upto all Licenses that within the Class and Licence Types nominated.

Bulk Invoice Print Form

The Bulk Invoice Print allows for the printing of Bulk Invoices based on the selection criteria entered on this display.

The process works in the following way:-

- For the relevant Classes of Licenses, and the selected Debtor (if nominated), interrogate the relevant fees that have already been 'Transferred' to the Debtors module and return the collated details to the License Module to allow the Invoice to be generated.
- The Invoices will be printed and recorded that the Invoice has been printed via the standard Letter Option.



Bulk Invoice Print Form

Debtor

If a particular Debtor's Invoices are to be produced then the ability to select a particular Debtor Number is available. If a Debtor Number is nominated then Invoices will only be produced for the nominated Debtor. The Pop Up will display the Debtor Search Profile to allow for the searching and selection of the required Debtor. This field can be left blank or used in conjunction with the other fields available.

Licence Number

The Licence Number range can be used to filter the process over a particular range of Licence Numbers. This field can be left blank or used in conjunction with the other fields available.

Expiry Date

The Expiry Date range can be used to filter the process over a particular range of Licenses by Expiry Date. This field can be left blank or used in conjunction with the other fields available.

Class

A list of Classes authorised to use the Bulk Invoice Generation process are shown and can be selected for the process. Highlight the required Class to be processed. Multiple Classes can be selected.

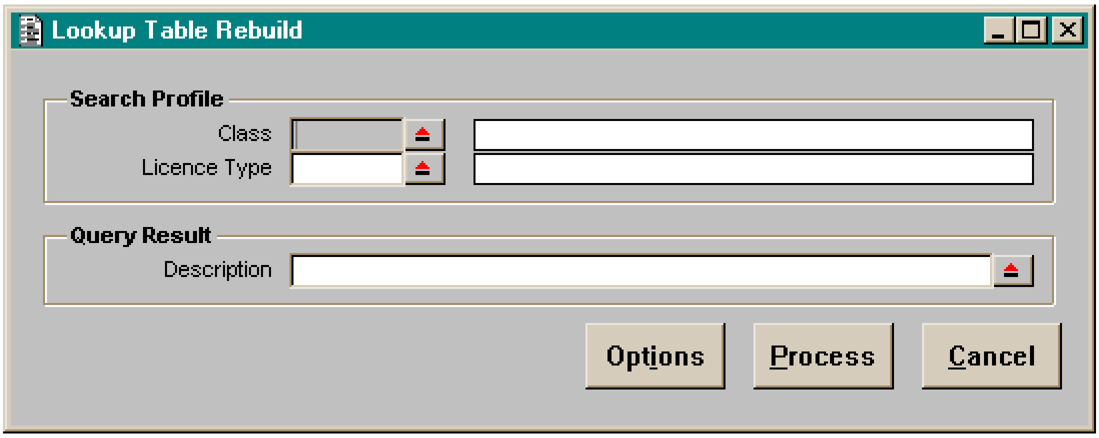
Select All
The Select All option when flagged On will highlight all the Classes listed in the Class area of the display. Flagging the field OFF will deselect all the Classes.

Job Type
The Job Type defaults to Report Only but can be changed to Update and Report. When the process is run in Report Only then the Exception Report is produced but no Invoices are produced. Update and Report will produce Invoices, record an entry in the Letters Option that the Invoice has been produced, and provide the Exception Report.

Rebuild Look Up Table

Lookup Table Rebuild Form

The Lookup Table Rebuild Option would only be done on the advice of Support Staff from INFOR, but is designed to rebuild the Table of Licences that is stored within the System. At times the User may find that Search criteria do not seem correct, or a particular Licence known to be in the system cannot be found. This Rebuilding of the Lookup Table may sort out any of these problems. This Option, as mentioned before should only be run after contacting INFOR and being specifically advised to do so.



Lookup Table Rebuild Form

Search Profile - Class

The Class field allows the User to either enter a Class Code if known, or use the Pop Up Button to select from the list of predefined Classes.
Once entered, the Description will be defaulted from the Class setup.

Search Profile - Licence Type

The Licence Type field allows the User to either enter a Licence Type if known, or use the Pop Up Button to select from a list of predefined Licence Types.
Once entered, the Description of the Licence Type will be defaulted from the Licence Type Setup.

Query Result

The Query Result Option allows the User to enter a predefined Query Name if know, or click on the Pop Up Button to select from the Predefined list of Queries previously created.

Details on how to create and maintain Queries are detailed in the Query Manual.

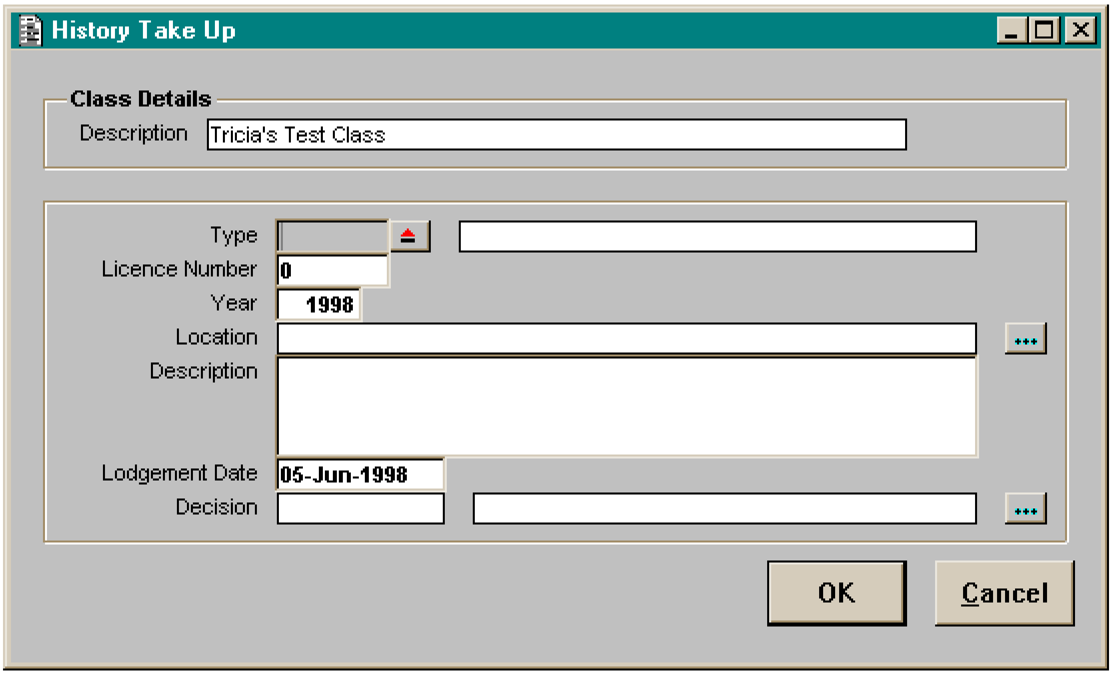
History Take Up

History Take Up Form

The History Take Up Form is designed to allow a Council to key in Licences from a previous system that may not have been converted. This is a similar type function for Lodging the Licence, but the User would not have to go through all the Tasks that may have been assigned to the Particular Licence Type. The benefit of using this option is that the User may specify the Number that the Licence can be given, where as at Lodgement the Next Available number is chosen. Only one Licence may be keyed here at a time.

A Parameter ‘Check Existing Numbers’ is available within the Licensing Parameters. This check box controls the checking of Existing Numbers when entering in Licences via the History Take Up Menu.

If this is set on, when Licences of the Same Number exist as that being entered in History Take Up, the User will be presented with a summary form, where there is only one match or a selection form if there are multiple matches. The User is then able to use the display button to view the Licence if required. When the Quit button is selected they are returned back to the History Take Up Option and can either continue with the process or cancel out if the entry is not required.



History Take Up Form

Class Details - Description
This field details the Description of the Class required to be assigned to the Licence.

Type

This field may be used to enter the Licence Type required if known, or select the Pop Up Button to choose from the Predefined Licence Types.

Licence Number
This field allows the User to enter a Licence Number that will require a History Takeup.

Year
This field allows the User to enter a Year of the Licence that will require a History Takeup

Location

This field allows the User to select a Location required for the History Take Up. A Location may be entered directly if known or use the Detail button located at the end of the field, to detail out to a Property Search Profile.

Description

This field allows the User to enter any Description that will be entered against the Licence.

Lodgement Date

This field allows the User to enter a date that a Licence will be shown as being entered on that date.

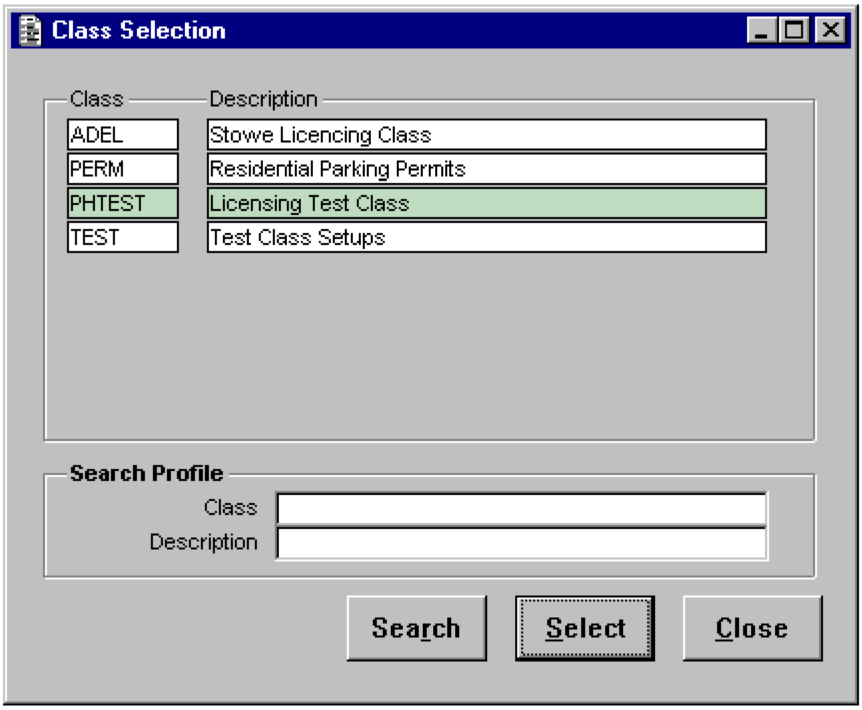
Decision

This field allows the User to enter a Decision that may be entered against a Licence. A detail button is provided to allow the User to detail to a list of Decisions already in the system.

Licence Renewal

Class Selection Form

The Class Selection Form provides the User with a List of Authorised Classes and their Description. The User may simply select a Class from the displayed option, or use the Standard Search Profile to find a particular Class that may not be shown if there are multiple Classes in the list.



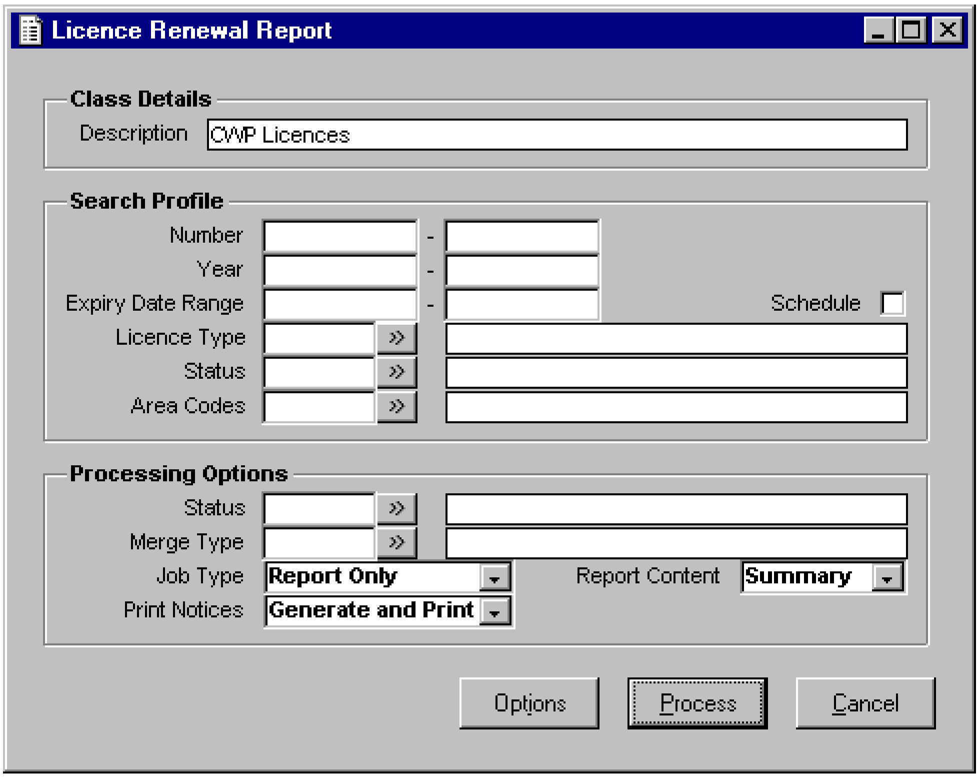
Class Selection Form

Licence Renewal Report Form

The Licence Renewal Option gives the User the ability to print a Report based on selected criteria of all Licences that are due or require Renewal. The Report may be printed only with no action taken, or may flag the Licence itself with a Renewal Flag.

Prior to entry to the Licence Renewal Option, the User will be presented with a Class Selection Form. This allows the User to choose from a list of Classes to which they are authorised

The form consists of the following fields:



Licence Renewal Report Form

Class Details - Description

This field lists the details of the current Class and Description chosen for Licence Renewal.

Search Profile – Number

As each Licence is lodged, it is allocated a number. These fields can be used to enter the number range required for the Licence Renewal Report.

Entering a number in the first field and tabbing to the next field will default the number entered in the first field into the second field. This will result in a direct search.

However if a range of licences are required then the following example explains how this is done;

Entering 6 in the first field and 10 in the second field will result in all Licences with the number range entered inclusive of the entered numbers.

Entering 6 in the first field and deleting the defaulted number in the second field will return Licence 6 and greater.

Search Profile – Year

Licences generally have a year allocated as part of their number. Entering the year in these fields will also help to narrow the length of search.

Entering a year in the first field and tabbing to the next field will default the year entered in the first field into the second field. This will result in all Licences lodged within the entered year and meeting any other search criteria.

However if a range of Licences are required then the following example explains how this is done;

Entering a year in the first field and a different year in the second field will result in all Licences with the year range entered inclusive of the entered years and meeting any other search criteria.

Note: If the F7 Clear function is used on the Search Profile the year entered in the first field will be retained for the entire session unless changed by the User.

Search Profile – Expiry Date Range

This field allows the User to search on a Licence based on an Expiry Date Range. The User may enter a 'To and From' range of dates to report on.

Search Profile - Schedule

The Schedule check box may be selected if this Licence Renewal Option is to be scheduled at a particular time.

Search Profile - Licence Type

This field allows the User to enter a Licence Type if known, or select the Pop Up Button to choose from a predefined list of Licence Types. Once selected this is the Licence Type that will be used to select which Licences will be renewed. The Option may be left blank to select all Licence Types.

If a Licence Type has been nominated then the Merge Type that has been defined on the Licence Type Parameters will default into the Merge field in the Processing Options.

If the Renewal Process is being run for more than one Licence Type then this field can be left blank and the process will use the Default Merge Type defined on each of the Licence Type Parameters or if the Merge Type is entered in the Processing Options it will use this to produce the documents.

Search Profile – Status

This field allows the User to enter a Status if known, or select the Pop Up Button to choose from a predefined list of Status. Once selected this is the Status that the Licences selected are currently at.

Search Profile – Area Codes

This field allows the User to enter an Area Code if known, or select the Pop Up Button to choose from a predefined list of Area Codes. Once selected this is the Area Code that the Licences will be selected on.

Processing Options - Status

This field allows the User to enter a Status if known, or select the Pop Up Button to choose from a predefined list of Status. Once selected this is the Status that will be applied to the Licences.

Processing Options – Merge Type

This field allows the User to enter a Merge Type if known, or select the Pop Up Button to choose from a predefined list of Area Codes. If a Licence Type has been nominated in the Search Profile section then the Merge Type that has been defined on the Licence Type Parameters will default into this field.

If the Renewal Process is being run for more than one Licence Type then this field can be left blank and the process will use the Default Merge Type defined on each of the Licence Type Parameters. If a Merge Type is entered then it will be used to generate the Renewal Notice for all the Licence Types selected and the default Merge Types for the Licence Types will be ignored.

Processing Options - Job Type

This field allows the User to specify when running the Licence Renewal Report whether they wish to just Report on the Licence Renewal, or have them Reported and Updated.
A Report will only produce a list of Licences that meet the criteria selected.
A Report and Update option will produce a list of the Licences that meet the criteria, and also update the specific Renewal flags in the system and Print the Licences requested.
A further option to Generate Licences will create a Word Processing Request and allow the Licences to be printed via the Batch Processing Option.

Processing Options - Report Content

The Report content consists of two options - Summary or Detail.
A Summary Report will produce a scaled down of the Detailed report.

Print Notices

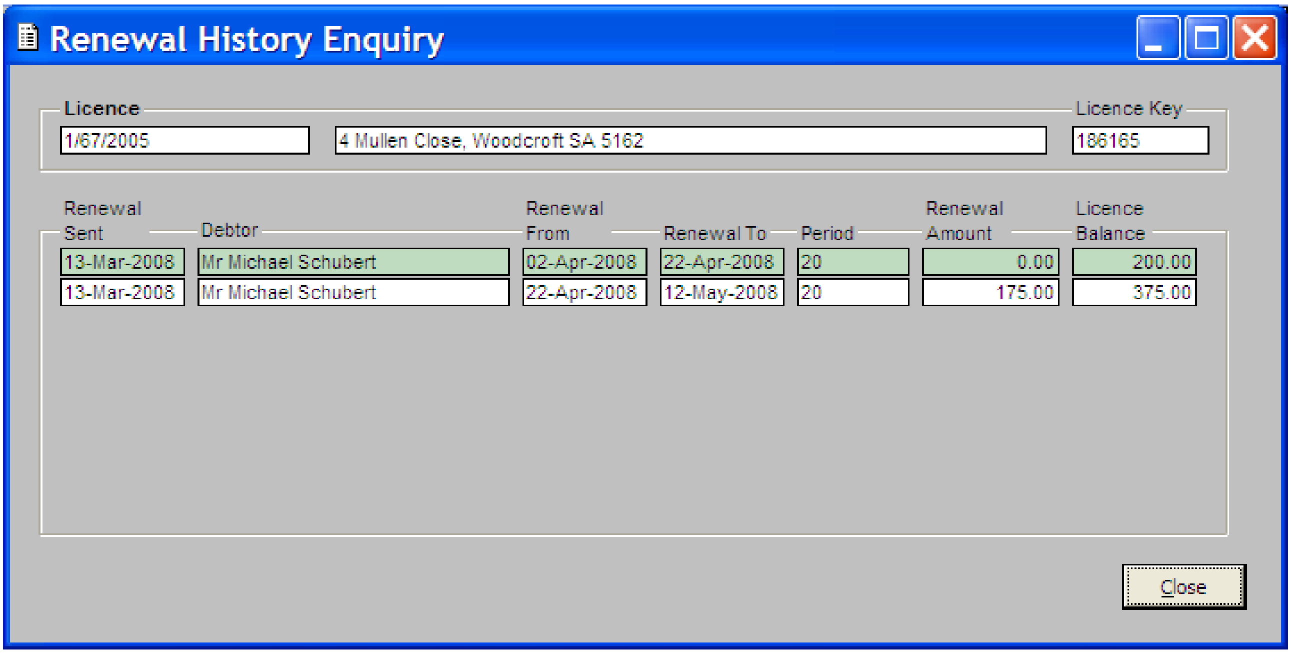
This field allows the User to select from three options:

- Generate
- Generate and Print
- Neither

The Generate Option will only generate the Notices and they may be printed later from the Batch Printing Option.

The Generate and Print option will allow the User to actually generate and Print the Notices.
Selecting Neither will not generate or Print the Licences. It should only be used when selecting the Report Only Option.

Licence Renewal History



Renewal History Form

Licence Number
This is the formatted number of the Licence that has been selected.

Licence Location
This is the location of where the Licence is registered to.

Licence Internal Record Number
This is the internal record number of the Licence

Renewal Information
A new option "Renewal History" has been added to the Licence Summary form. This option will open the Renewal History Enquiry form that will display information on the licence's renewal history.

This history record will be created whenever the Licence Renewal Process is run over a licence, as long as the Issue Licence flag on the Licence Type Maintenance form is not set.

This history will list the following non-maintainable fields:

FIELD NAME	DESCRIPTION
Renewal Sent	The date the Renewal Process was run.
Debtor	If the Licence Class uses Pathway Debtors, then this will be the Identity of the Debtor of the Pathway Debtor the fees were assigned too. If the License Class does not use Pathway Debtors (eg as in Cash mode), the Debtor will be the Identity of the first “Debtor” Name Role on the Licence.
Period From	This is the start date of the licence period.
Period To	This is the end date of the licence period.
Period	The length of the standard renewal period.
Renewal Amount	The total of all fees charge for the renewal.

Licence Balance	The Licence total balance at the time of renewal.

For information on assigning access authority to the Renewal History option, please consult the Special Instructions After Release.

Licence Renewal Workflow

The Licence Renewal Workflow is based on:

- Having an Approval on the latest Licence decision
- The Expiry Date falls within the Range selected on the control form and
- Status of the Licence is different from that of the Renewal Control.

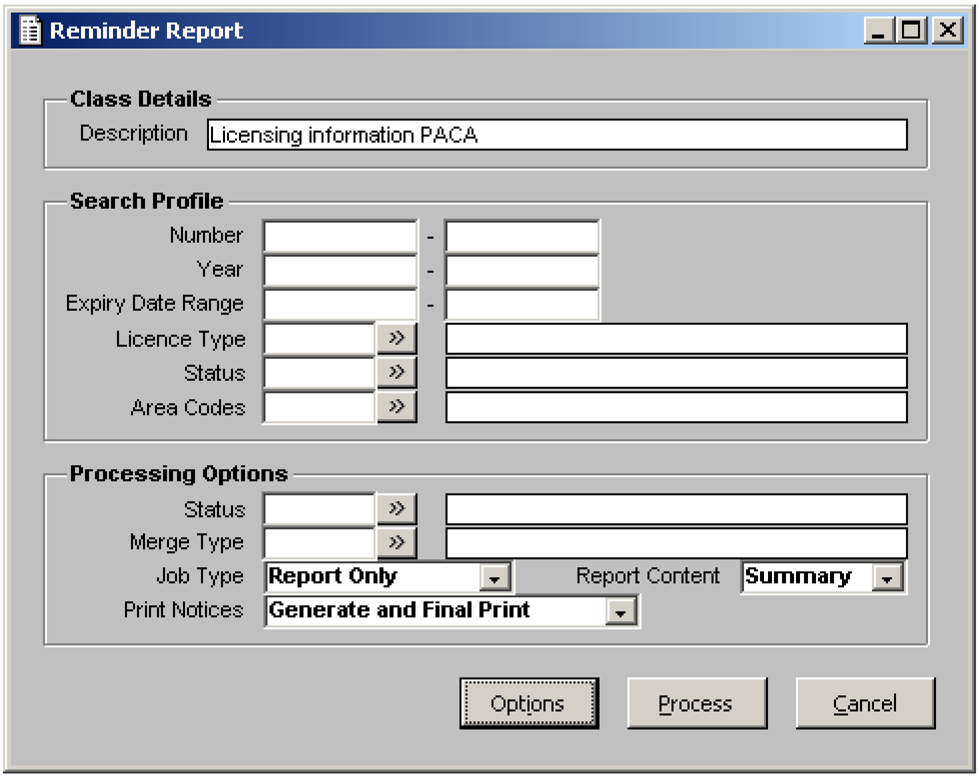
When the Update Option is run the following occurs:

- The Status of the Licence is updated
- A New Licence Number is generated (if set on in parameters)
- A New Expiry Date is generated (if auto renew is checked on at Type Level)
- If Auto Renew is selected, the Print Licence Flag will be checked on (Logs a Request to Print Licence)
- If the Auto Renew option is not checked on then it doesn't update the expiry date and does not log a request to Print the Licence.
- Fees will be raised (if Renewal Fees selected at the Type Level)
- Notice will generated and or printed (If Renewal Merge Type has been created)
- Report will be generated

Licence Reminder

Reminder Report Form

The Licence Reminder Function is used to Generate Reminder Notices for all unpaid Licences. The Function may be run in report mode only (to check results) or update mode. A Status Code may also be selected to update the processed records.



Reminder Report Form

Class Details - Description
These fields list the details of the current Class and Description chosen for Licence Renewal.

Search Profile – Number
As each Licence is lodged, it is allocated a number, These fields can be used to enter the number range required for the report.

Entering a number in the first field and tabbing to the next field will default the number entered in the first field into the second field. This will result in a direct search.,

However if a range of Licences are required then the following example explains how this is done;

Entering 6 in the first field and 10 in the second field will result in all Licences with the number range entered inclusive of the entered numbers.

Entering 6 in the first field and deleting the defaulted number in the second field will return Licence 6 and greater.

Search Profile – Year

Licences generally have a year allocated as part of their number. Entering the year in these fields will also help to narrow the length of search.

Entering a year in the first field and tabbing to the next field will default the year entered in the first field into the second field. This will result in all Licences lodged within the entered year and meeting any other search criteria.

However if a range of Licences are required then the following example explains how this is done;

Entering a year in the first field and a different year in the second field will result in all Licences with the year range entered inclusive of the entered years and meeting any other search criteria.

Note: If the F7 Clear function is used on the Search Profile the year entered in the first field will be retained for the entire session unless changed by the User.

Search Profile - Expiry Date Range

Enter the expiry dates required for the licences you wish to send reminders to. This is a mandatory field.

Search Profile - Licence Type

This field allows the User to enter a Licence Type if know, or select the Pop Up Button to choose from a predefined list of Licence Types. Once selected this is the Licence Type that will be used to select which Licences will be renewed. The Option may be left blank to select all Licence Types.

If a Licence Type has been nominated then the Merge Type that has been defined on the Licence Type Parameters will default into Merge Type field in the Processing Options.

If the Reminder Process is being run for more than one Licence Type then this field can be left blank and the process will use the Default Merge Type defined on each of the Licence Type Parameters or the Merge Type nominated if one has been entered in the Processing Options.

Search Profile – Status

This field allows the User to enter a Status if known, or select the Pop Up Button to choose from a predefined list of Status. Once selected this is the Status that the Licences selected are currently at.

Search Profile – Area Codes

This field allows the User to enter an Area Code if known, or select the Pop Up Button to choose from a predefined list of Area Codes. Once selected this is the Area Code that the Licences will be selected on.

Processing Options - Status

The status that is entered here will be the status the licence is changed to once the reminder report has been run.

Processing Options – Merge Type

If a Licence Type has been nominated in the Search Profile section then the Merge Type that has been defined on the Licence Type Parameters will default into this field.

If the Reminder Process is being run for more than one Licence Type then this field can be left blank and the process will use the Default Merge Type defined on each of the Licence Type Parameters. If a Merge Type is entered then it will be used to generate the Reminder Notice for all the Licence Types selected and the default Merge Types for the Licence Types will be ignored.

Processing Options - Job Type

This field allows the User to specify when running the Licence Reminder Report whether they wish to just Report on the Licence Reminder, or have them Reported and Updated.
A Report will only produce a list of Licences that meet the criteria selected.
Report and Update options will both produce a list of the Licences that meet the criteria, and also update the specific Renewal flags in the system and Print the Licences requested.
A further option to Generate Licences will create a Word Processing Request and allow the Licences to be printed via the Batch Processing Option.

Processing Options - Report Content

LAPC7710_LAPDMY1_REPORT_CONTS

The Report content consists of two options - Summary or Detail.
A Summary Report will produce a scaled down of the Detailed report.

Print Notices
As per the Job Types above, if this field is checked on, Licences meeting the selected Criteria will be printed.

Licence Reminder Workflow

The Licence Reminder Workflow is based on:

- Having an Approval on the latest Licence decision
- The Expiry Date falls within the Range selected on the control form and
- There is an outstanding balance on the Licence

When the Update Option is run the following occurs:

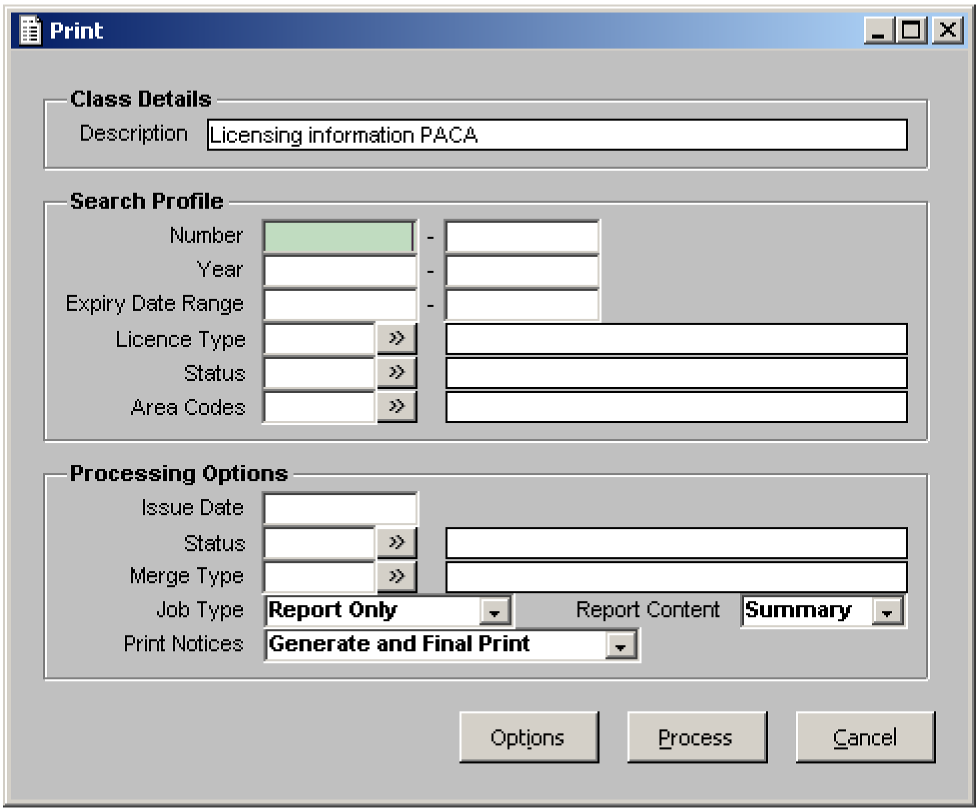
- The Status of the Licence is updated to that nominated on the control form
- A Reminder Notice will generated and or printed (If Reminder Merge Type has been created)
- Report will be generated

Print Licence

Print Form

This function is used to generate Licence Notices for all Licences. The User has the ability to run the report in Report Mode only prior to having and results updated when run in the Print and Update mode.

The User may also select a Status Code that will update all selected Licences when the Update and Print mode is run.



Print Form

Class Details - Description
This field details the actual Class of Licence that has currently been selected.

Search Profile – Number
As each Licence is lodged, it is allocated a number. These fields can be used to enter the number range required for the Print run.

Entering a number in the first field and tabbing to the next field will default the number entered in the first field into the second field. This will result in a direct search.

However if a range of Licences are required then the following example explains how this is done;

Entering 6 in the first field and 10 in the second field will result in all Licences with the number range entered inclusive of the entered numbers.

Entering 6 in the first field and deleting the defaulted number in the second field will return Licence 6 and greater.

Search Profile – Year

Licences generally have a year allocated as part of their number. Entering the year in these fields will also help to narrow the length of search.

Entering a year in the first field and tabbing to the next field will default the year entered in the first field into the second field. This will result in all Licences lodged within the entered year and meeting any other search criteria.

However if a range of Licences are required then the following example explains how this is done;

Entering a year in the first field and a different year in the second field will result in all Licences with the year range entered inclusive of the entered years and meeting any other search criteria.

Note: If the F7 Clear function is used on the Search profile the year entered in the first field will be retained for the entire session unless changed by the User.

Search Profile - Expiry Date Range

The expiry date of the Licence. Enter the expiry dates required for the licences you wish to send reminders to. This is a mandatory field.

Search Profile - Licence Type

This field allows the User to enter a Licence Type that is required for Printing. Once selected the Class code and description will be displayed in these fields.

If the Code is unknown, the User may select the Pop Up Button next to the Licence Code, and select from a range of predefined Licence Types.

If a Licence Type has been nominated then the Merge Type that has been defined on the Licence Type Parameters will default into the Merge Type field in the Processing Options.

If the Licence Print Process is being run for more than one Licence Type then this field can be left blank and the process will use the Default Merge Type defined on each of the Licence Type Parameters. If a Merge Type is entered then it will be used to generate the Licence Notice for all the Licence Types selected and the default Merge Types for the Licence Types will be ignored.

Search Profile – Status

This field allows the User to enter a Status if known, or select the Pop Up Button to choose from a predefined list of Status. Once selected this is the Status that the Licences selected are currently at.

Search Profile – Area Codes

This field allows the User to enter an Area Code if known, or select the Pop Up Button to choose from a predefined list of Area Codes. Once selected this is the Area Code that the Licences will be selected on.

Processing Options - Issue Date

The User should enter a date in this field that they wish to reflect the Licence as having been issued on. Double clicking in this field will display the calendar to allow date selection if required.

Processing Options - Status

The status that is entered here will be the status the licence is changed to once the reminder report has been run.

Processing Options – Merge Type

If a Licence Type has been nominated in the Search Profile section then the Merge Type that has been defined on the Licence Type Parameters will default into this field.

If the Licence Print Process is being run for more than one Licence Type then this field can be left blank and the process will use the Default Merge Type defined on each of the Licence Type Parameters. If a Merge Type is entered then it will be used to generate the Licence Notice for all the Licence Types selected and the default Merge Types for the Licence Types will be ignored.

Processing Options - Job Type

This field allows the User to select the drop down button and choose from Report Only Mode or Report and Update Mode.

Report Only Mode allows the User to produce a list of Licences that fall into the criteria selected. This may be useful if wishing to check what Licences will be issued.
If any corrections or additions are required, the User may the go to each separate Licence Maintenance and modify them. The Report Mode can be re-run again to verify all Licences will be printed correctly.

The Report and Update Mode is selected when the User is satisfied with the results of the Report. Once selected and processed all Licences matching the criteria selected will be printed.

Processing Options - Report Content
This field allows the User to select the drop down button and choose from Summary or Detail option.
The Summary will produce a list of Licence Numbers that have been selected to print.
The Detail option will give a much greater selection of information regarding each Licence that is to be printed.

It is suggested that the User print one of each Type of Report and then a decision may be made as to whether a Summary Report is sufficient for Council needs or if a Detailed report will be required.

The Defaults that are entered in this report may be stored as a Set Default. Setting these options is described fully in the Batch Processing Manual.

Processing Options - Print Notices
There are 3 main options here – Generate the Licence and Print (Email where possible or just Print them), Only Generate the Licence but not print or do neither of the above.

Processing Options – Report Content
There is a selection to print the details of the renewal in full or to just have a summary of the licences reported on.

Processing Options – Delivery Method
Deleivery Method – use the default delivery method registered against the Licencee or select none for Print Only. This field is dimmed out if ‘Neither’ is chosen in the Print Notices option.

Licence Print Workflow

The Licence Print Workflow is based on:

- Having an Approval on the latest Licence decision
- The Licence Request Flag on a Licence Record is ON.

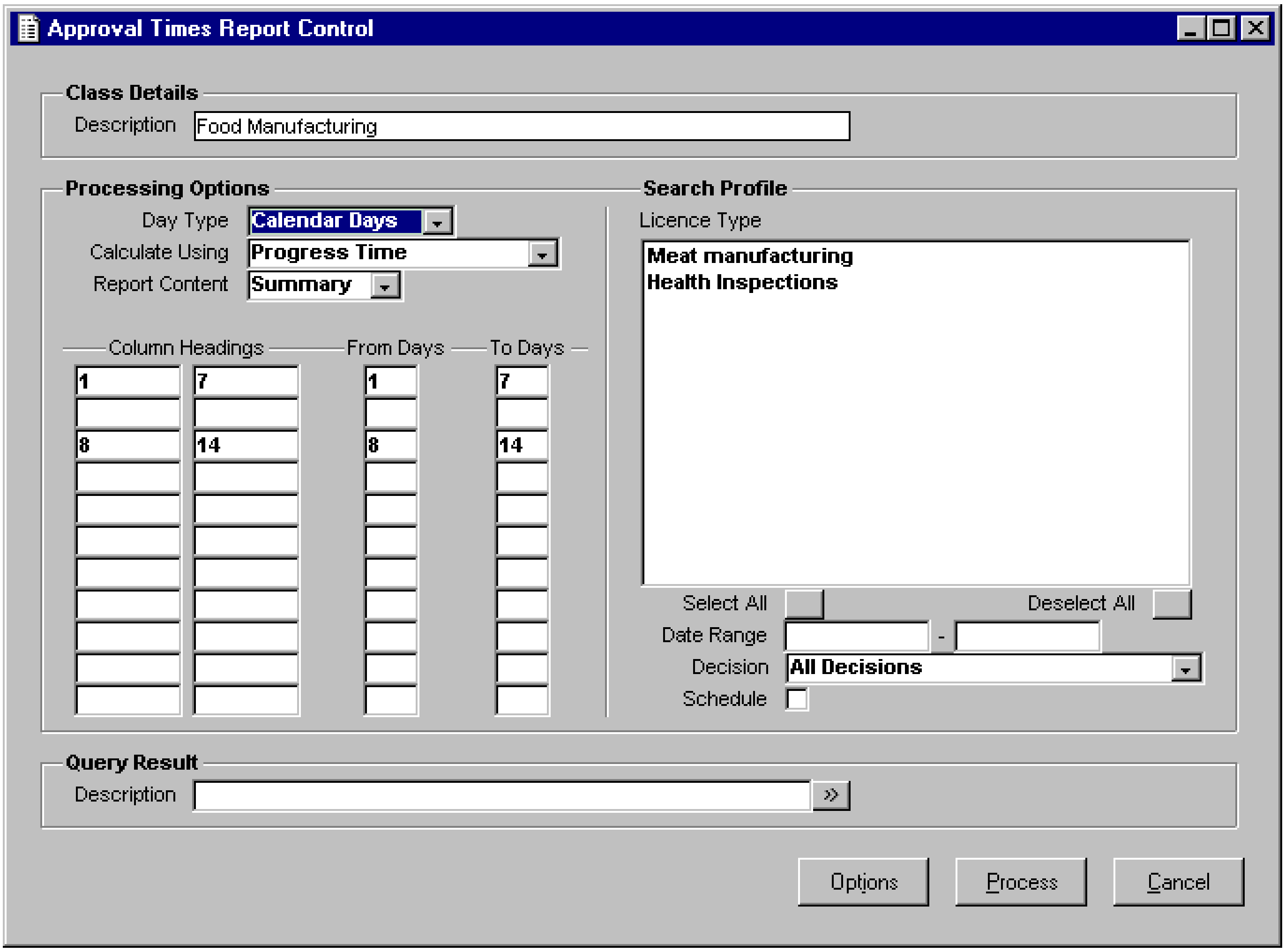
When the Update Option is run the following occurs:

- The Status of the Licence is updated to that nominated on the control form
- A Licence Notice will generated and or printed (If Reminder Merge Type has been created)
- Report will be generated
- The Licence Request Flag is turned OFF.

Approval Times Report

Print Approval Times Form

The Print Approval Times Report is designed for the User to produce Lists of the Times it took for Particular Tasks to be Approved.



Approval Times Report Control Form

Class - Description
This field details the Current Class selected.

Day Type
This field has a drop down button to select from either Calendar Days or Work Days as the criteria for Day Type.

Calculate Using
This field has a drop down button that allows Users to select from the Options of Progress time or Included Tasks Only. When Included Tasks Only is selected this option will also display Suspend Times on the report.

Report Content
The report content consists of two options - Summary or Detail.

A Summary Report will produce a scaled down version of the Detailed report.

Column Headings
The Column Headings allow the User to enter the Titles they wish to be displayed on the Report.

From Days
This field may be used to enter the specific day number that the Approval Times Report will be produced by.

To Days
This field may be used to enter the specific day number that the Approval Times Report will be produced by.

These fields would normal be similar to the following:
1 - 7
8 -14
15-21
22-31 etc

Search Profile – Type
This field allows the User to select a Type or code given to the Licence by clicking on the required Licence Type. To select more than one click on any other required Licence Type. To deselect one or any of the selected Licence Type by clicking on the highlighted Licence Type that is no longer required.

Select All
Clicking on the Select All button will select all the Licence Types available to the Licence Class.

Deselect All
Clicking on the Deselect All button will deselect all the Licence Types selected for the Licence Class

Decision Date Range
These fields allow the User to enter a date range that Decisions have been assigned to the Tasks. A From and To Date is required in the fields. The User may double click in the fields to show the System Calendar display.

Decision
This field allows the User to select from the Decision Types. The drop down options allows for the selection of the Following:

- Approvals Only
- Rejection Only
- Decisions not Approvals or Rejections
- All Decisions
- No Decision

When any of these options are selected (except for ‘No Decision’), the entered Date Range is matched against the latest Licence Decision Date., When ‘No Decision’ is selected, the Date Range is matched against the Expiry Date for Licences.

This enables the User to limit the number of Licenses reported on when using the ‘No Decision’ option.

Query Result
The Query Result Option allows the User to enter a predefined Query Name if know, or click on the Pop Up Button to select from the Predefined list of Queries previously created.
Details on how to create and maintain Queries are detailed in the Query Manual.

Lost Numbers Report

The Licensing Module has the ability to track Lost Numbers under the two following scenarios:

- During the Licence Entry of a Licence. If the Licence Entry is cancelled after the message that a Number had been generated, that number is stored in a "Lost Numbers" table"
- When a Licence is deleted. If a Licence is deleted, the number is stored in the "Lost Numbers" table"

Lost Numbers Control Form

The Lost Numbers Report allows Lost Numbers to be found by Date, by the Numbering Code the number was generated from, by the User of the System when the number was lost or any combination of the above. Using the Query facility can also process the Lost Number Report.

The report identifies the following details:

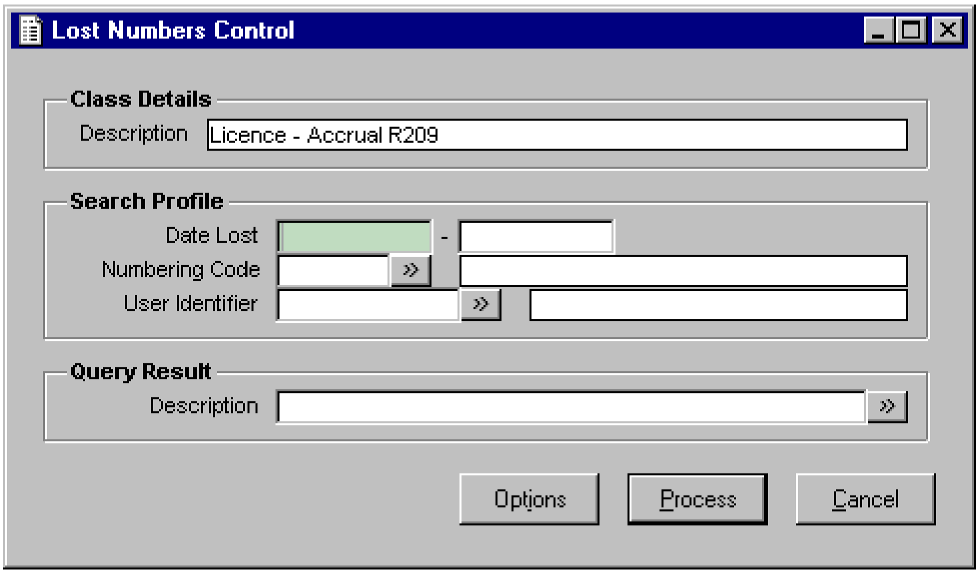
- Number: Number of the Licence
- Year: Licence Year
- Date Lost: Date (including time) the Number was lost
- User Identifier: Users ID
- User Name: User Name
- Mode: Licence Entry or Deleted

The Lost Licence Numbers are grouped by the Numbering Code and a total is given for each Number Code as well as a Total number of Licences for the report.

This report may be used for auditing purposes to display numbers that have been deleted or lost.

However if Users wish to re-use these numbers they may do so via the History Takeup option

NOTE: if the Lost Numbers are re-used, the number will not be removed from the Lost Number Table. This table does not update as numbers are reused.



Lost Numbers Control Form

Class Detail - Description
This field details the name of the Class currently selected.

Search Profile – Date Lost

The Date Lost may be used to select a particular “from” and “to” range of Licences required for Reporting on. Enter a date in the first field and tab to the second field to enter a “to” date. Double clicking in the field will display the Pop Up Calendar allowing the required dated to be selected.

Search Profile – Numbering Code

The Numbering Code may be used to select a particular range of Licences required for Reporting on. Enter a Numbering Code in the first field if known or select from a predefined list from the Pop Up list.

Search Profile – User Identifier

The User Identifier may be used to select a particular range of Licences required for Reporting on. Enter a User Identifier in the first field if known or select from a predefined list from the Pop Up list.

Query Result - Description

The Query Result Option may be used. The Pop Up Button may be selected to choose from any pre-defined Queries.

Prepayment Report

This Report produces a list of Prepayments for Applications. The search profile includes a Prepayment Reference Number Range, a Date Range and gives the option to include those Prepayment that are unallocated only or have been allocated already. The Report can be produced in Detail or Summary format.

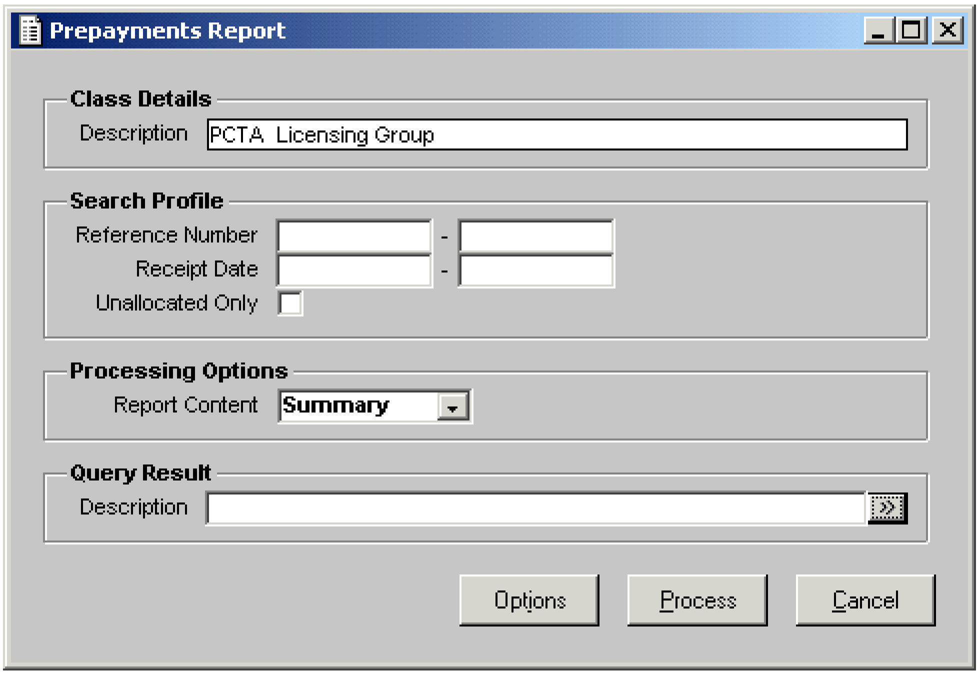
Prepayment Report Control Form

The Prepayment Report produces a list of Prepayments for Licensing. The search profile includes a Prepayment Reference Number Range, a Date Range and gives the option to include those Prepayment that are unallocated only or have been allocated already. The Report can be produced in Detail or Summary format.

The report displays the following details for each format:

Summary:-
Reference Number
Allocated Amount
Narrative of Receipt
Receipt Number
Receipt Date
Refund Amount
Balance
Receipt Name

Detail:-
Reference Number
Allocated Amount
Narrative of Receipt
Receipt Number
Receipt Date
Refund Amount
Balance
Receipt Number
Licence Number
Location
Date
Amount
Tax Amount
Description



Prepayments Report Form

Class Detail - Description
This field details the name of the Class currently selected.

Search Profile – Reference Number Range
The Reference Number Range can be used to select a particular range of Prepayment References. These fields can be left blank or used in conjunction with the other fields within the Search Profile area.

Search Profile – Receipt Date
The Receipt Date Range can be used to select particular Prepayments that have been receipted within the Date Range entered. These fields can be left blank or used in conjunction with the other fields within the Search Profile area.

Search Profile – Unallocated Only
The Unallocated Only check box is used to only select those Prepayments that have a balance remaining that has not been allocated to a Licence. When this Check Box is ticked on, Prepayments that have been fully allocated will not be included in the report. If the Check Box is not ticked on then all Prepayments will be reported on.

This field can be left blank or used in conjunction with the other fields within the Search Profile area.

Processing Options – Report Content
The Report Content field allows selection of Summary or Detail. The default upon entry into this form is Summary. Use the Dropdown to select the Content that is required.

Summary Format:-
Reference Number
Allocated Amount
Narrative of Receipt
Receipt Number
Receipt Date
Refund Amount
Balance
Receipt Name

Detail Format:-
Reference Number
Allocated Amount
Narrative of Receipt

Receipt Number
Receipt Date
Refund Amount
Balance
Receipt Number
Licence Number
Location
Date
Amount
Tax Amount
Description

Query Result - Description

If a Query Result has been defined over the LAPPPAY table then that Result can be used in this field to produce the Report.

Food Safety Information Extract

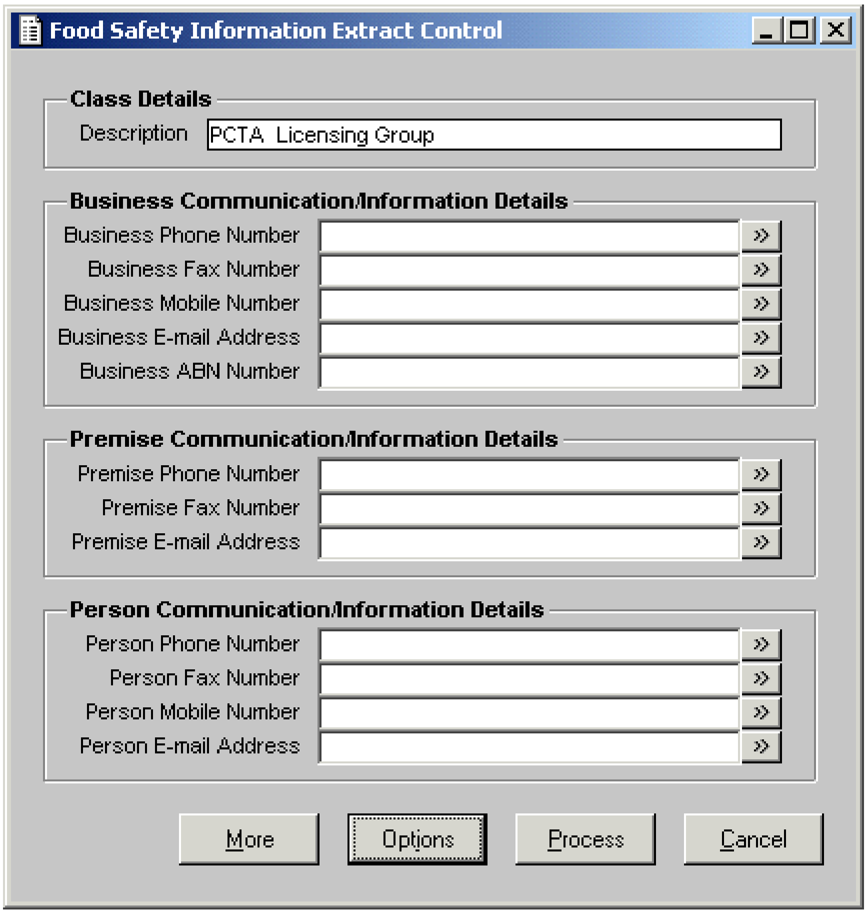
Food Safety Information Extract Control Form

The Food Safety Information Extract Control form allows the generation of the XML files required by the VicFIN.

All fields are mandatory. All fields within the MORE option are mandatory. Three Exception Reports are generated, one each for the Core Business Data, the Premises Inspection Data and the Premises Compliance Data.

If the Job Type is set to Report Only, the XML files are not generated, even if there are no exceptions. It is advisable that the extract be run in Report Only mode first until all exceptions have been resolved, then run the extract in Update and Report Mode.

Details regarding the processing of these files are available following the screen capture below.



Food Safety Information Extract Control Form

Food Safety Information

<u>EXPORT PROCESS</u>

<u>Special Notes on Processing</u>

- All fields on the Control form are mandatory

- All options on the 'More' option are mandatory
- 3 Exception reports are generated when run in either 'Report Only' or 'Update and Report' mode.
- These Exception Reports are for the Core Business Data, Premises Inspection Date and the Premises Compliance Data. It is advisable that the extract is run in 'Report Only' mode until **ALL** Exceptions have been resolved, then run the extract in 'Update and Report' mode.
- If the Job Type is set to 'Report Only' then the XML files are **NOT** generated, even if there are no Exceptions reported.
- In 'Update and Report' mode, the Core Business Data XML file will only be generated when there are **NO** exceptions for **ANY** of the records.
- In 'Update and Report' mode, the Premises Inspection XML file is only populated with records that **DO NOT** have any exceptions reported.
- In 'Update and Report' mode, the Premises Compliance Data XML file is only populated with records that **DO NOT** have any exceptions reported.
- In 'Update and Report' mode, once a Licence has been extract where the Premise Close Date is present the Licence is reported in the Extract and then updated with the Extract Date on the Food Safety Information Form, therefore automatically excluding the reporting of the Licence in any future VicFIN Extracts.
- In 'Report Only' or 'Update and Report' modes the process will automatically use the Licensee Name details if there is no Proprietor on the Licence. If there is a Proprietor but no Licensee then an exception on the Licensee record will be reported.
- In 'Report Only' or 'Update and Report' modes the process will automatically use the Trading Name details if there is no Premise on the Licence, or the Premise Details if there is no Trading Name details. If neither exist then an exception on the Trading Name record will be reported.

Premise Inspection Selection Process

Inspections are only included in the Premise Inspection XML file where the Inspection Date is not in the future (past the Extract Date) and the Inspection has a Result Code. The following checks are used to determine the Inspections that are included in the XML File.

Check One:-

- The Date of the Inspection is before the Extract Date
- The Inspection is checked for mandatory fields before extracting data
- The Inspection has a Result and therefore does not produce an exception

Check Two:-

- The Date of the Inspection is before the Extract Date
- The Inspection is checked for mandatory fields before extracting data
- The Inspection does not have a Result and therefore produces an exception

Check Three:-

- The Date of the Inspection is after the Extract Date
- The Inspection has a Result
- The Inspection is not checked for mandatory fields and is not extracted

Check Four:-

- The Date of the Inspection is after the Extract Date
- The Inspection does not have a Result
- The Inspection is not checked for mandatory fields and is not extracted

Check Five:-

- The Inspection does not have a Date
- The Inspection has a Result
- The Inspection is checked for mandatory fields before extracting data
- The Inspection does not have a Date which therefore produces an exception

Check Six:-

- The Inspection does not have a Date
- The Inspection does not have a Result
- The Inspection does not have a date or a result therefore does not get extracted and does report as an exception

EXTRACT FIELDS & DATA

Special Notes on Extract Fields & Data

Trading Name
The 1st Trading Name is used for the following XML fields (or Premise if no Trading Name)

- RegAuthorityBusinessCode
- BusinessName
- BusinessABN
- BusinessPostal Address
- BusinessSuburb
- BusinessPostcode

NOTE: - Where the mandatory field *BusinessABN* is blank on the Trading Name record within Pathway then the XML field is populated with '*99999999999*' (eleven 9's) therefore excluding it from being reported as an Exception on the Exception Report.

Proprietor Role
The 1st Proprietor Role Record is used for the following XML fields (or Licensee if no Proprietor Name)

- BusinessContactName
- BusinessContactPhone
- BusinessContactFax
- BusinessContactMobile
- BusinessContactEmail

NOTE: - Where the mandatory field *BusinessContactPhone* is blank on the Proprietor Role record within Pathway then the XML field is populated with '*999999999999*' (twelve 9's) therefore excluding it from being reported as an Exception on the Exception Report.

Premise Role
The 1st Premise Role Record is used for the following XML fields (or Trading Name if no Premise Name)

- RegAuthorityPremisesCode
- PremisesAddress
- PremisesSuburb
- PremisesState
- PremisesPostcode
- PremisesPhone
- PremisesFax
- PremisesEmail

Name Communication Types
The Core Business Data uses data from the Name Communication Types in the following XML fields

- BusinessContactPhone
- BusinessContactFax
- BusinessContactMobile
- PremisesPhone
- PremisesFax
- PersonPhone
- PersonFax
- PersonMobile

NOTE – The Name Communication Types allow entry of up to 50 characters. The XML fields only allow up to 12 characters. Therefore care should be taken when entering information in the phone / fax / mobile numbers otherwise data will be lost.

Where the mandatory field *PersonPhone* is blank on the Name record within Pathway then the XML field is populated with '*999999999999*' (twelve 9's) therefore excluding it from being reported as an Exception on the Exception Report.

Address Components
The Address Components used by the Food Safety Information Extract are

- Component 2 being the Suburb
- Component 4 being the State
- Component 5 being the Postcode

NOTE: - Using these 3 Components for anything other than what is stated above will cause incorrect data to be extracted to the VicFIN files.

LETTERS
If Letters are required to be produced including the Food Safety Information then the following Extract Lists and fields are available to be used.

Extract Lists

Food Safety Modules	**FOODMODS** Module_Code Module_Description
Premises	**PREMISES** Premise_Code Premise_Description

General Extract Fields

Food Safety Information	Compliance_Type_Code Compliance_Type_Descr Compliant Date_Compliance_Checked Date_Premise_Closed Date_Premise_Registered Date_Premise_Suspended FSI_Comments Language_Spoken_Code Language_Spoken_Descr Number_of_Staff Risk_Level_Code Risk_Level_Descr Safety_Program_Code Safety_Program_Descr
Food Safety Supervisor	Safety_Supervisor_Name Safety_Supervisor_Comm_1 Safety_Supervisor_Comm_2 Safety_Supervisor_Comm_3 Safety_Supervisor_Info_1 Safety_Supervisor_Info_2 Safety_Supervisor_Info_3 Safety_Supervisor_Address Safety_Supervisor_Adrs_1
Recall Contact	Recall_Contact_Name Recall_Contact_Comm_1 Recall_Contact_Comm_2 Recall_Contact_Comm_3 Recall_Contact_Info_1 Recall_Contact_Info_2 Recall_Contact_Info_3 Recall_Contact_Address Recall_Contact_Adrs_1

Premise	Premise_Name Premise_Comm_1 Premise_Comm_2 Premise_Comm_3 Premise_Info_1 Premise_Info_2 Premise_Info_3 Premise_Address Premise_Adrs_1

Class Detail - Description
This field details the name of the Class currently selected.

Business Communication/Information Details – Business Phone Number
Enter in the Communication/Information Type that is to be used to display the Business Phone Number. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

Business Communication/Information Details – Business Fax Number
Enter in the Communication/Information Type that is to be used to display the Business Fax Number. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

Business Communication/Information Details – Business Mobile Number
Enter in the Communication/Information Type that is to be used to display the Business Mobile Number. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

Business Communication/Information Details – Business E-mail Address
Enter in the Communication/Information Type that is to be used to display the Business E-mail Address. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

Business Communication/Information Details – Business ABN Number
Enter in the Communication/Information Type that is to be used to display the Business ABN Number. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

Premise Communication/Information Details – Premise Phone Number
Enter in the Communication/Information Type that is to be used to display the Premise Phone Number. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

Premise Communication/Information Details – Premise Fax Number
Enter in the Communication/Information Type that is to be used to display the Premise Fax Number. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

Premise Communication/Information Details – Premise E-mail Address
Enter in the Communication/Information Type that is to be used to display the Premise E-mail Address. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

Person Communication/Information Details – Person Phone Number
Enter in the Communication/Information Type that is to be used to display the Person Phone Number. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

Person Communication/Information Details – Person Fax Number
Enter in the Communication/Information Type that is to be used to display the Person Fax Number. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

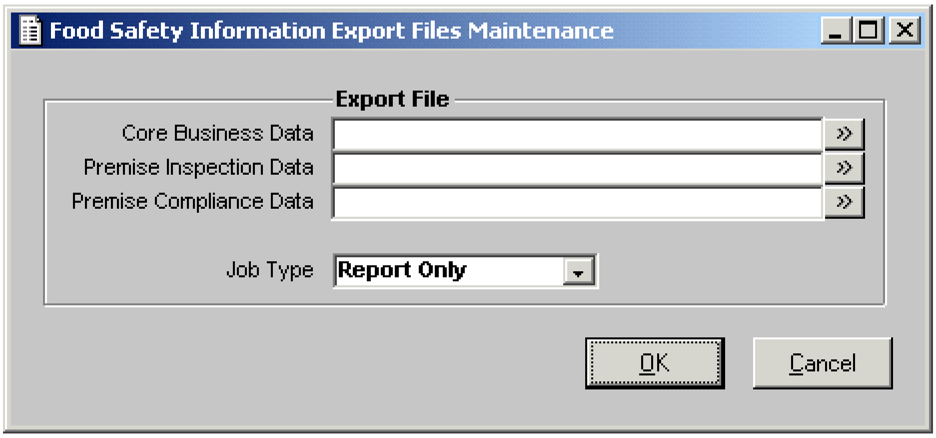
Person Communication/Information Details – Person Mobile Number
Enter in the Communication/Information Type that is to be used to display Person Mobile Number. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

Person Communication/Information Details – Person E-mail Address
Enter in the Communication/Information Type that is to be used to display the Person E-mail Address. The Pop Up can be used to select the appropriate Communication Type. This is a mandatory field.

More Button
Selecting the More button will display the Food Safety Information Export Files Maintenance form where you can enter in the paths and file names for the 3 files that are created when the process is run in Update and Report mode.

Food Safety Information Export Files Maintenance

This form allows the entry of the paths and file names for the 3 files that are created when the process is run in Update and Report Mode.



Food Safety Information Export Files Maintenance Form

Core Business Data
Enter in the path and file name for the Core Business Data to be produced.

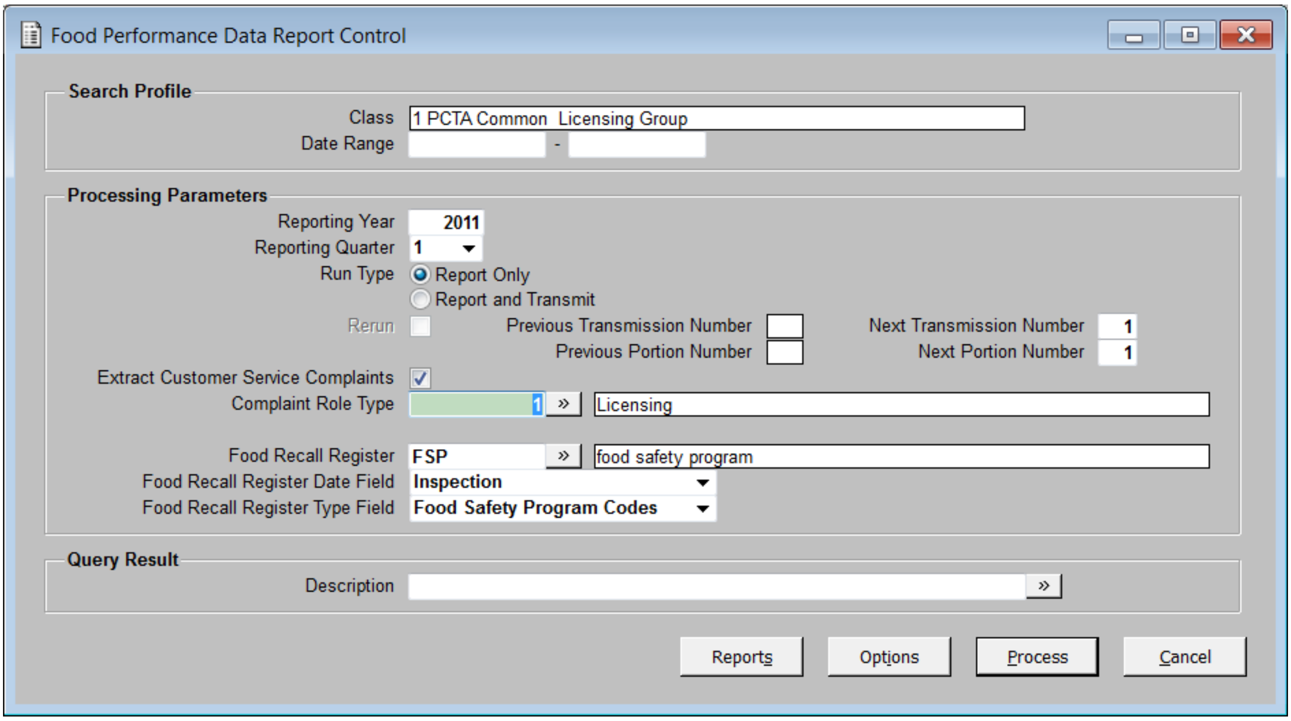
Premise Inspection Data
Enter in the path and file name for the Premise Inspection Data to be produced.

Premise Compliance Data
Enter in the path and file name for the Premise Compliance Data to be produced.

Job Type
There are two options available for the Job Type. These are ‘Report Only’ and ‘Update and Report’.

Food Performance Data Report

** Victorian Sites Only **
A new function to allow Food Performance Data to be reported to the Victorian Department of Health has been added to Pathway.



Food Performance Data Report form

Food Performance Data Report – Search Profile – Class Description
This is the Class of Licence selected to include for the Food Performance Data Report.

Food Performance Data Report – Search Profile – Date Range
The Date Range is mandatory and relates to the reporting period being reported.

Only licenses that fall within the date range (inclusive) will be reported. Licences with a lodgement date after the 'to date' will be ignored and Licences with an expiry date before the 'from date' will also be ignored.

The Status History, Inspection, Complaint, Enforcement, Verdict, Prosecution and Food Recall data reported for each licence will also be restricted to those that fall within the date range (inclusive).

Food Performance Data Report – Processing Parameters – Reporting Year
This field is mandatory and relates to the reporting year being reported.

Food Performance Data Report – Processing Parameters – Reporting Quarter
This field is mandatory and relates to the reporting quarter being reported. Values are 1, 2, 3 and 4.

Food Performance Data Report – Processing Parameters – Report Only
Report Only – Generates the report without sending it to the Department of Health. This option can be used to check for any exceptions that may be generated within the Food Performance Data Exception Report. This option also allows the xml report to be examined before it is sent to the Department of Health.

Food Performance Data Report – Processing Parameters – Report and Transmit
Report and Transmit – Generates the report and sends it to the Department of Health. However the report will NOT be sent if there are any exceptions generated within the Food Performance Data Exception Report.

Food Performance Data Report – Processing Parameters – Rerun

The Rerun option enables a report to be resent to the Department of Health and replace the previously sent report.

Food Performance Data Report – Processing Parameters – Previous Transmission Number
This is the transmission number of the previously sent report. The Previous Transmission Number cannot be maintained.

Food Performance Data Report – Processing Parameters – Next Transmission Number
This is the transmission number that will be included within the next report sent to the Department of Health. It is used by the Department of Health Repository to determine whether the report is a replacement to a previously sent report. Previously sent reports for the same collection period will be overwritten by a report with a higher transmission number. The Next Transmission Number is set to 1 for each new quarter and incremented whenever a rerun is performed. The Next Transmission Number is automatically calculated and should not need to be changed but the ability to maintain it has been provided if required.

Food Performance Data Report – Processing Parameters – Previous Portion Number
This is the portion number of the previously sent report. The Previous Portion Number cannot be maintained.

Food Performance Data Report – Processing Parameters – Next Portion Number
This is the portion number that will be included within the next report sent to the Department of Health. It is used by the Department of Health Repository to determine whether the report is additional to a previously sent report for the current collection period. Increments in the portion number will cause the report to be appended to, rather than replace the previously sent report. For example if a month's data is submitted in four weekly portions, the first weeks data would have a portion number of 1, the second weeks data would have a portion number of 2, etc. The portion number is also used when there are more than 500 premises reported. If a report extracts 600 premises two files will be sent to the Department of Health. If this is the first report for the quarter the first file will contain 500 records and have a portion number of 1. The second file will contain 100 records and have a portion number of 2. The Next Portion Number is automatically calculated and should not need to be changed but the ability to maintain it has been provided if required.

Food Performance Data Report – Processing Parameters – Extract Customer Service Complaints
This option should be checked on if complaints are held within the Customer Services module.

Food Performance Data Report – Processing Parameters – Complaint Role Type
This field is mandatory if the option *Extract Customer Services Complaints* has been selected. The role type used to link the Customer Services complaint to the licence should be selected.

Food Performance Data Report – Processing Parameters – Food Recall Register
If food recalls are to be reported then the register used to hold the food recall details should be selected.

Food Performance Data Report – Processing Parameters – Register Date Field
This field is mandatory if a Food Recall Register has been selected. This is the register field that contains the date that the food recall notice was issued.

Food Performance Data Report – Processing Parameters – Register Type Field
Mandatory if a Food Recall Register has been selected. This is the register field that contains the food recall type code.
Valid Food Recall Type Codes:

Code	Description
10	On Site Visit
11	Verbal Notification
12	Written Notification

Food Performance Data Report – Processing Parameters – Query Result
The Query Result enables a specific Licence or group of Licences to be specified for reporting.
Food Performance Data Exception Report
An Exception Report is generated by the Food Performance Data Report Control form regardless of the run type. The report lists any data errors that may have been encountered during processing. An exception is typically raised because some required data has not been populated or because no mapping has been provided between the Pathway Parameter and the Department of Health Parameter.

Licence	Message
1	Water Supply is mandatory. The Licence has not been reported.
1	Status APPROV has not been mapped to a Department of Health Status. The Current Status has not been reported.
1	Status DEFER has not been mapped to a Department of Health Status. The Historical Status has not been reported.
1	Food Safety Program SP has not been mapped to a Department of Health Food Safety Program. The Licence has not been reported.
1	Inspection on 02-Jun-2009 has an Inspection Type of IT3, this has not been mapped to a Department of Health Inspection Type or Audit/Assessment Type. The Inspection has not been reported.
1	Inspection on 02-Jun-2009 does not have an Inspection Result. The Inspection has not been reported.
1	Inspection without a date. The Inspection has not been reported.

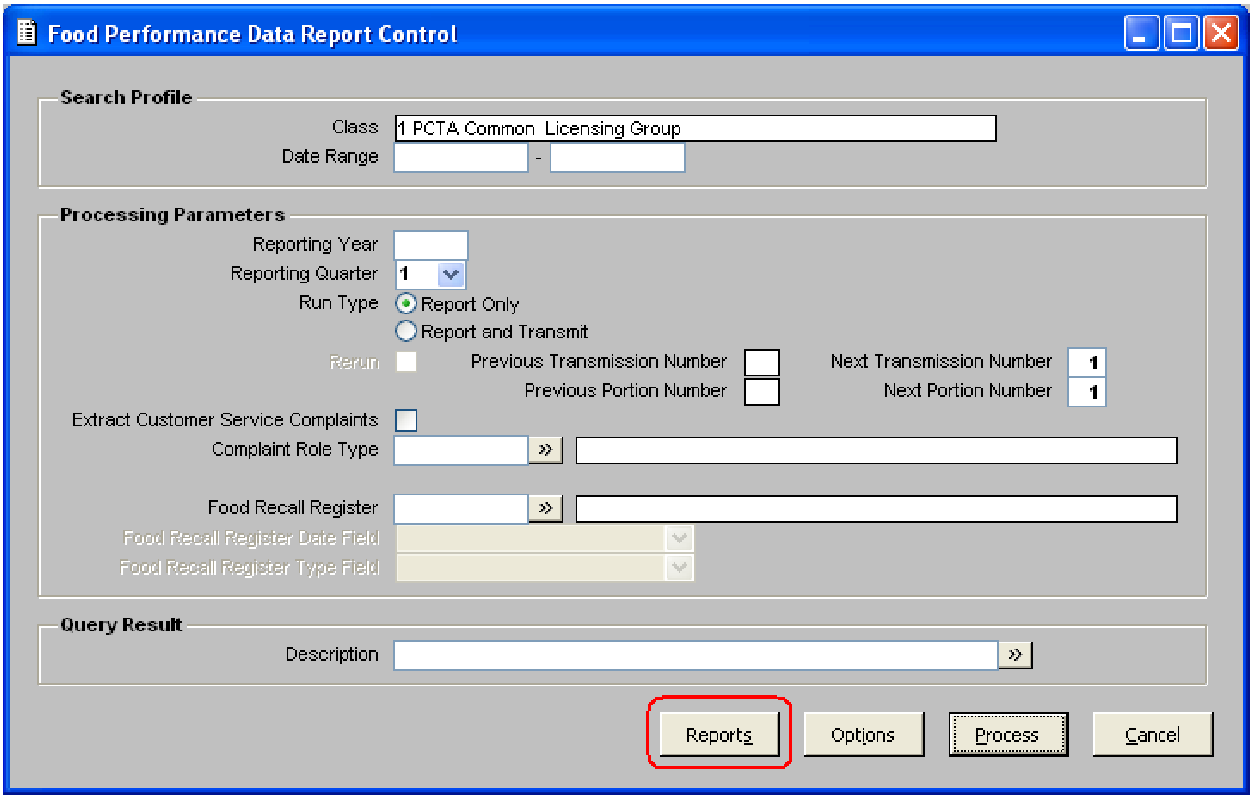
Total Premises Ignored:	1	Total Premises Reported:	0
Total Current Statuses Ignored:	1	Total Current Statuses Reported:	0
Total Historical Statuses Ignored:	1	Total Historical Statuses Reported:	0
Total Audit/Assessments Ignored:	0	Total Audit/Assessments Reported:	0
Total Inspections Ignored:	2	Total Inspections Reported:	0
Total Enforcements Ignored:	0	Total Enforcements Reported:	0
Total Prosecutions Ignored:	0	Total Prosecutions Reported:	0
Total Verdicts Ignored:	0	Total Verdicts Reported:	0
Total Complaints Ignored:	0	Total Complaints Reported:	0
Total Food Recalls Ignored:	0	Total Food Recalls Reported:	0
Total Exceptions:	5		

--- End of Report ---

Food Performance Data Exception Report Sample

Viewing Food Performance Data Reports

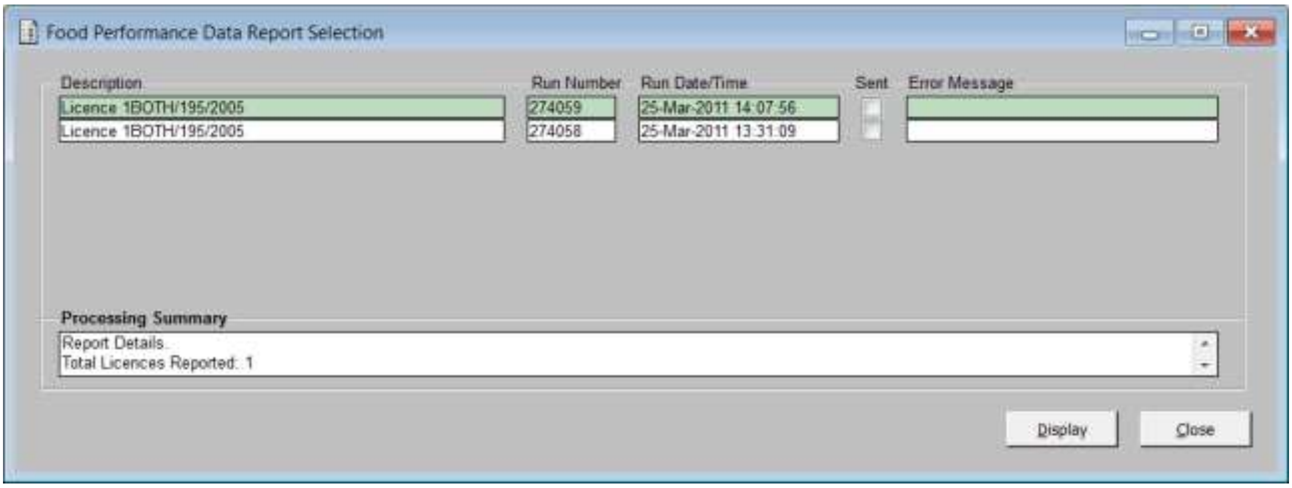
The Food Performance Data Report generated can be viewed by pressing the Reports button on the Food Performance Data Report Control form.



Reports button on the Food Performance Data Report Control form
A list of all reports generated will be displayed on the Food Performance Data Report Selection form. Reports generated using the Run Type of Report Only will also be available for viewing. A report will only be available if at least one record was reported. Reports will be deleted if the processed job is deleted.

Food Performance Data Report Selection

A list of all reports generated will be displayed on the Food Performance Data Report Selection form. Reports generated using the Run Type of Report Only will also be available for viewing. A report will only be available if at least one record was reported. Reports will be deleted if the processed job is deleted.



Food Performance Data Report Selection form

Food Performance Data Report Selection - Description
This field shows the description of the Food Performance Data Report that has been run previously.

Food Performance Data Report Selection – Run Number
This field shows the Run Number of the Food Performance Data Report that has been run previously.

Food Performance Data Report Selection – Run Date/Time
This field shows the Date and Time of the run of the Food Performance Data Report that has been run previously.

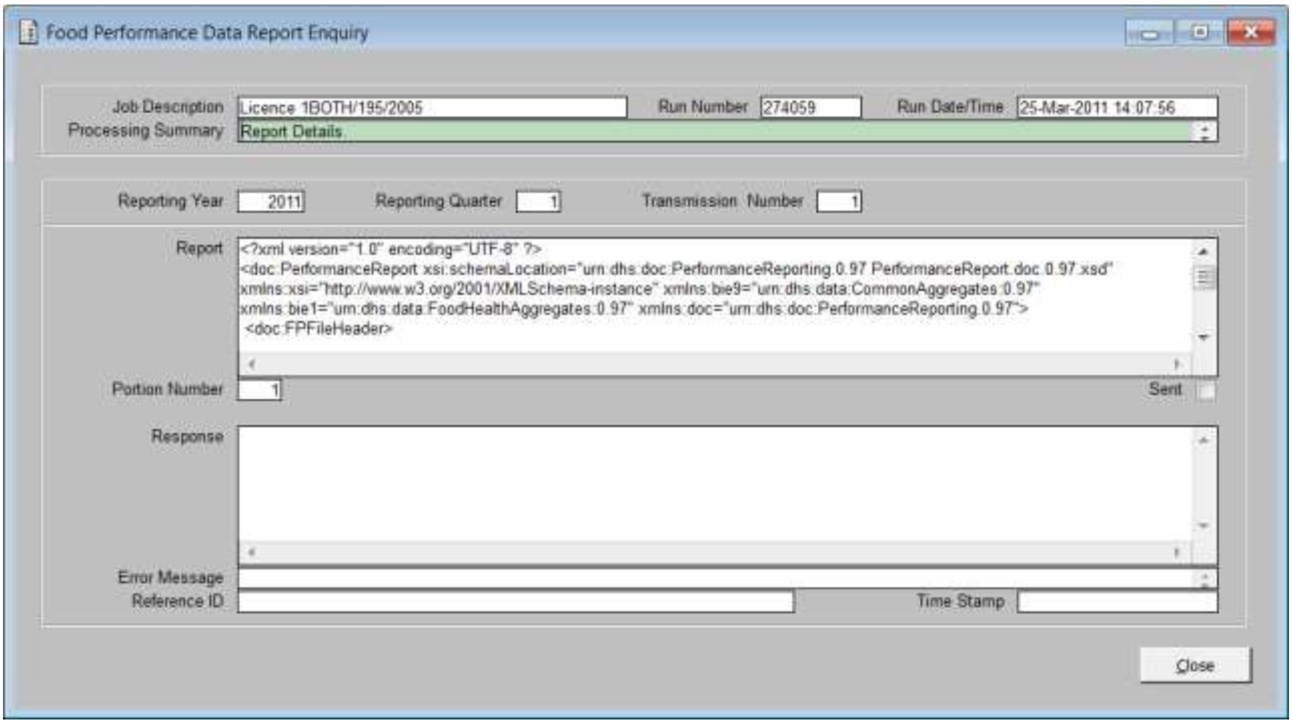
Food Performance Data Report Selection – Sent
This field if set on indicates that the report has been sent to the Department of Health.

Food Performance Data Report Selection – Error Message
This field shows the error message produced – if any.

Food Performance Data Report Selection – Processing Summary
This field shows a summary of the Processing job selected.

Food Performance Data Report Enquiry

Pressing the Display button will display the Food Performance Data Report Enquiry form. From this form a copy of the generated xml report can be viewed. If the report was sent to the Department of Health any response or errors returned from the Department of Health External Partner Gateway can be seen here. If the report was successfully sent the Reference ID and Time Stamp fields will be populated. If more than 500 premises were reported a scroll bar will be displayed allowing each report to be viewed, the Portion Number will be incremented on each of these reports.



Food Performance Data Report Enquiry form

Food Performance Data Report Enquiry – Job Description
This field displays the Licence Number that is in error.

Food Performance Data Report Enquiry – Run Number
This field displays the Run Number that contained the Licence that is in error.

Food Performance Data Report Enquiry – Run Run Date/Time
This is the Time and Date of the Run that contained the Licence that is in error.

Food Performance Data Report Enquiry – Reporting Year
This is the Year that the run was scheduled for.

Food Performance Data Report Enquiry – Reporting Quarter
This is the Quarter that the run was scheduled for.

Food Performance Data Report Enquiry – Transmission Number
This is the Transmission Number for the run that was processed.

Food Performance Data Report Enquiry – Report
This field shows the XML report information sent to Dept of Health.

Food Performance Data Report Enquiry – Portion Number
This field displays the Portion Number of the run.

Food Performance Data Report Enquiry – Response
This field displays the Response from the Dept of Health for the run.

Food Performance Data Report Enquiry – Error Message
This field displays the Error Message received from the Dept of Health – if any.

Food Performance Data Report Enquiry – Reference ID
This field displays the Reference ID for the Dept of Health.

Food Performance Data Report Enquiry – Time Stamp
This is the Time Stamp for the run.

Incentive Fees Report

Important Information:
The following outlines the requirements for the Incentive Fees Report. There is also important information regarding the set up of the Licence Category Dimensions.

Based on discussions with Logan City Council, whom the function has been created for, it is assumed that for reporting purposes Council does not issue a new Licence Number each year. If this does occur accurate reporting cannot be defined.

It is assumed that by providing the customer with this Rebate Fee that Council would advise the Customer that the rebate would only apply for a certain time. If not paid by that date then the rebate amount no longer applies. If this is not the case and there is no time limit for receiving the rebate then the next paragraph will not apply.

Where this is the case the following would need to be implemented.

Customer comes into Council and has not paid by the due date.
Cashier takes full payment from customer.
The amount would be allocated against the Licence leaving an amount in over payments. Licensing staff would then be required to add an adjustment to the Licence to correct the accepted amount back to the full amount of the fee. They are then able to select the overpayment from Overpayment Allocation and assign to the fee. This will then clear the balance.

If Licence Category Dimensions are used to calculate a Fee, then the sections on Licence Fees (Licence Category Fee Dimension Maintenance) and Licence Fees (Test Licence Category Fee Calculation) MUST be read and the appropriate changes implemented, otherwise any new Fee calculations will NOT be correct.

Aim:
Provide the ability to charge a reduced (Incentive) Fee based on a performance scale (score).

Example:
An Annual Fee of $500.00 is charged for a Licence. The Premise is inspected and given a percentage discount based on the score received.

Set up and Maintenance:
The following aspects of the Incentive Fees functionality will be covered:

1. Parameters:
- Major Licence Categories.
- Minor Licence Categories.
- Licence Category Dimensions.
- Licence Fees.
- Licence Fees (Licence Category Option).
- Licence Fees (Licence Category Fee Maintenance).
- Licence Fees (Licence Category Fee Dimension Maintenance).
- Licence Fees (Test Licence Category Fee Calculation).
2. Maintenance:
- Adding a new Fee.
- Major Licence Categories.
- Minor Licence Categories.
- Minor Licence Category Dimensions.
- Licence Fee Maintenance.
- Transaction Maintenance.
- Calculation Enquiry.
- Licence Category Calculation Enquiry.
3. Incentive Fees Report:
- Search Profile.

- Multi-select Pop Up forms.
- Inclusive / Exclusive searching for Multi-select Pop Up results.
- Processing Options.
- Generated Report Details.

Major Licence Categories:

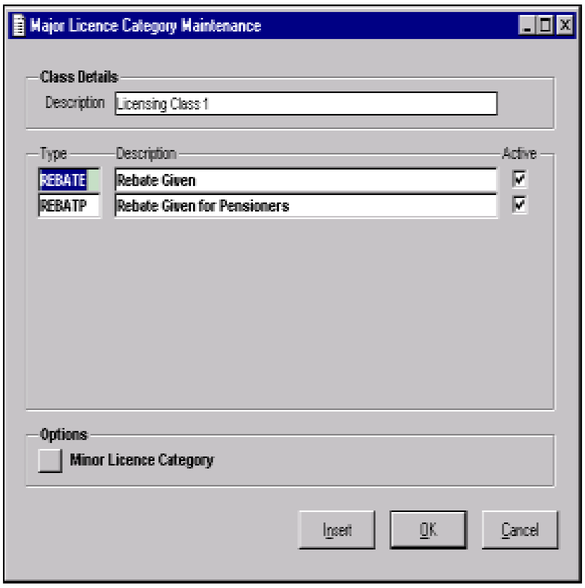


Diagram 1. Major Licence Category Maintenance.

There are three methods that can be used to set up the Licence Categories for Incentive Fees. The critical part is how the Licence Categories are applied to the Fee on the Licence, which will be covered in the Fees Maintenance section.

1. One Major Category with multiple Minor Categories.
2. Multiple Major Categories with only one Minor Category each.
3. Multiple Major Categories with multiple Minor Categories on each Major Category.

Methods 1 and 2 are the simplest and easiest to set up and use. 3 is complex and may cause confusion, therefore either method 1 or 2 is recommended. In the example above, method 2 is used. Please read the entire document first before doing any set up, to get an understanding of how the Licence Categories are applied to the Licence Fees before choosing the method most suitable to your business.

Minor Licence Categories:

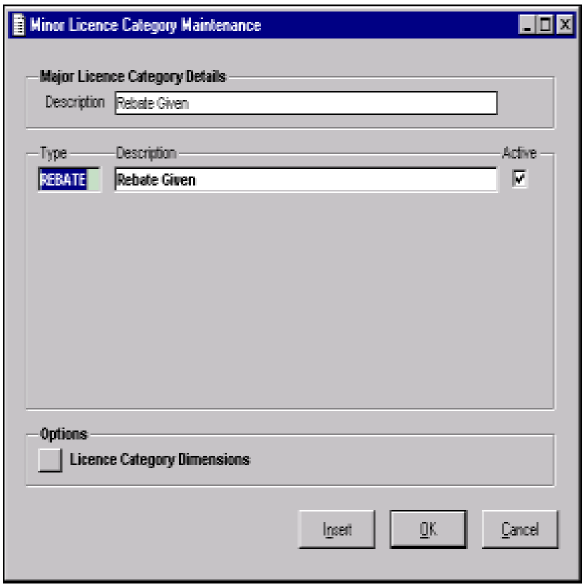


Diagram 2. Minor Licence Category Maintenance.

Using the Major Licence Category of 'REBATE - Rebate Given', only one Minor Licence Category has been created. In this example, the same Code and Description has been used for the Minor Licence Category as was used for the Major Licence Category. This is not necessary and can be defined to suit the business requirements.

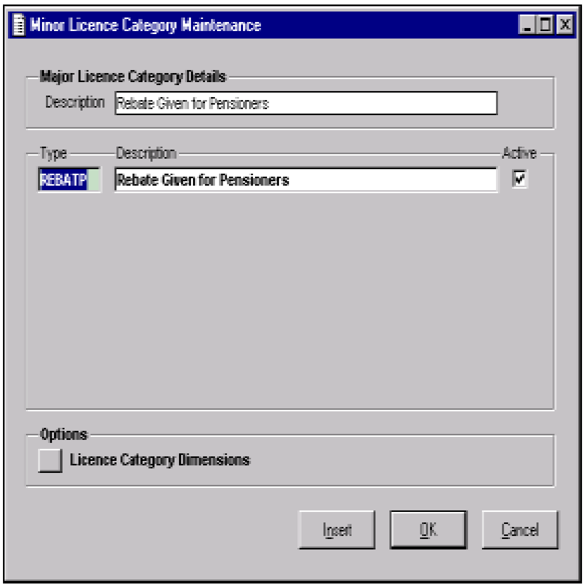


Diagram 3. Minor Licence Category Maintenance.

Under the Major Licence Category of 'REBATP – Rebate Given for Pensioners', only one Minor Licence Category has been created and has also been defined the same as the Major Licence Category.

Licence Category Dimensions:

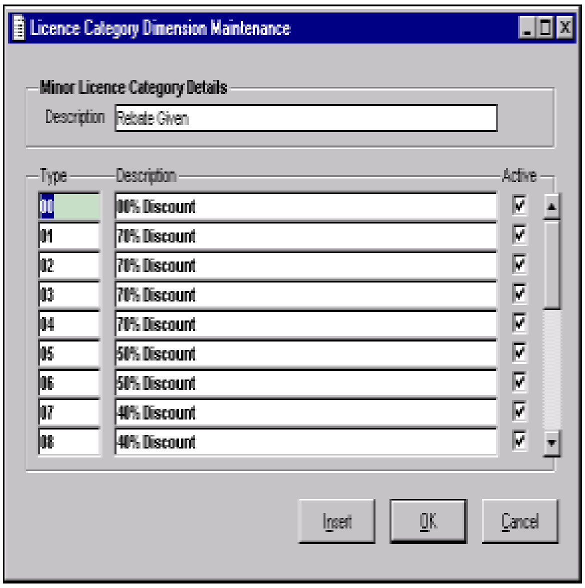


Diagram 4. Licence Category Dimension Maintenance.

The Dimensions created are the ‘scores’ that can be given. In this example, the possible scores go from 00 to 12. For each score, the description is what discount percentage gets applied for that score. The values defined in the Code and Description for these Dimensions are important, as these are the actual values extracted in the Incentive Fees Report.

1 Digit Code	2 Digit Code
0	00
1	01
10	02
11	03
12	04
2	05
3	06
4	07
5	08
6	09
7	10
8	11
9	12

Table 1. Sort order for Licence Category Dimension Maintenance Form.

The sort order for the Licence Category Dimension Maintenance Form is based on the Code field and in order for the Codes to appear in numerical order starting from 0 at the top to 12 at the bottom, it is recommended that the scores are defined using 2 digits. Table 1 above shows how the order varies when 1 or 2 digit Codes are used.

Licence Fees:

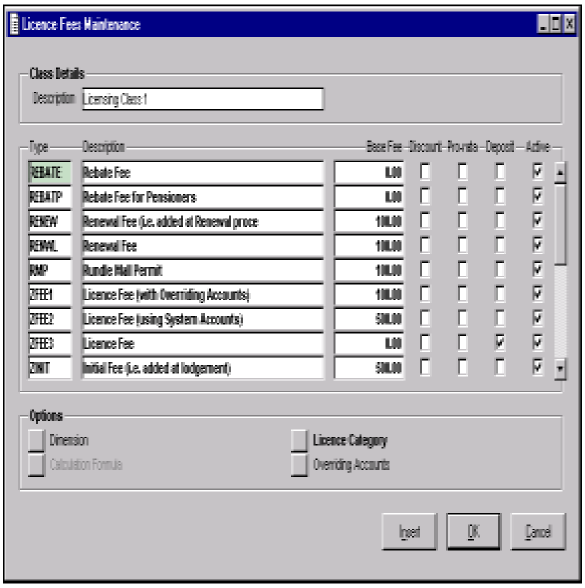


Diagram 5. Licence Fees Maintenance Form.

Under Licence Fees Maintenance, two Fees have been created:

1. REBATE – Rebate Fee.
2. REBATP – Rebate Fee for Pensioners.

Important Note:
The Base Fee for these Incentive Fees MUST be set to 0.00 otherwise the information extracted on the Incentive Fees Report will not be correct.

Licence Fees (Licence Category Option):

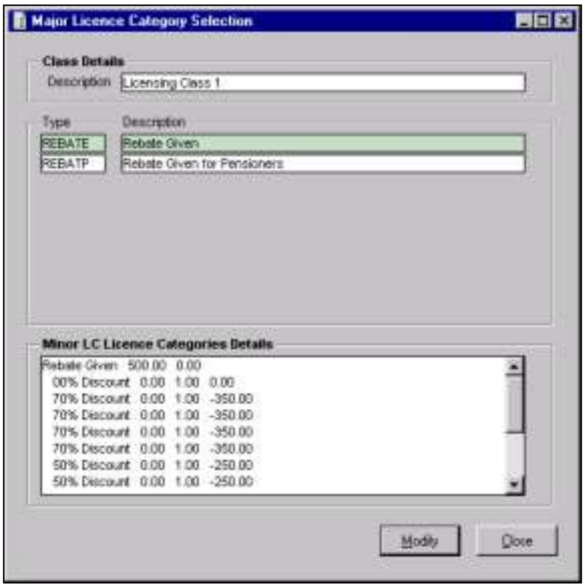


Diagram 6. Major Licence Category Selection.

From the Licence Fees Maintenance form, using the Licence Category Options button, the Major Licence Category Selection form will show the Major Licence Categories set up earlier. Select the Major Licence Category that is relevant to the Incentive Fee created.

In this example, the Licence Fee of 'REBATE – Rebate Fee' is being used, therefore the Major Licence Category of 'REBATE – Rebate Given' is selected. If the Licence Fee of 'REBATP – Rebate Fee for

Pensioners' was used, the Major Licence Category of 'REBATP- Rebate Given for Pensioners' should be selected.

Licence Fees (Licence Category Fee Maintenance):

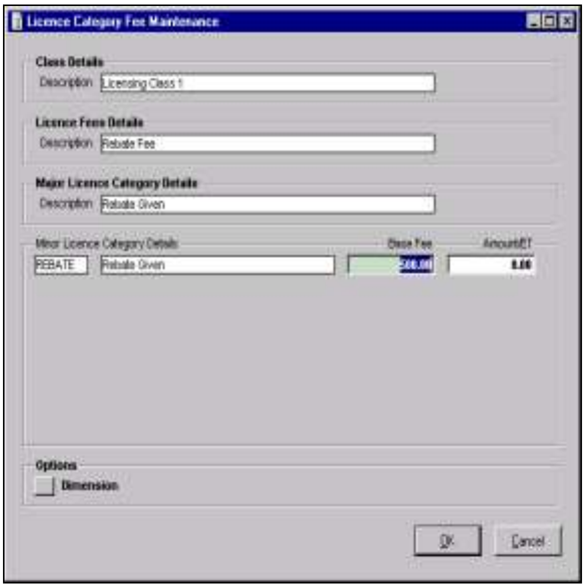


Diagram 7. Licence Category Fee Maintenance Form.

For the Major Licence Category of 'REBATE – Rebate Given', only one Minor Licence Category was set up (method 2). Against the Minor Licence Category the Base Fee must be set to the full amount of the Licence Fee. In this example, the full amount for the Licence Fee is $500.00.

Licence Fees (Licence Category Fee Dimension Maintenance).

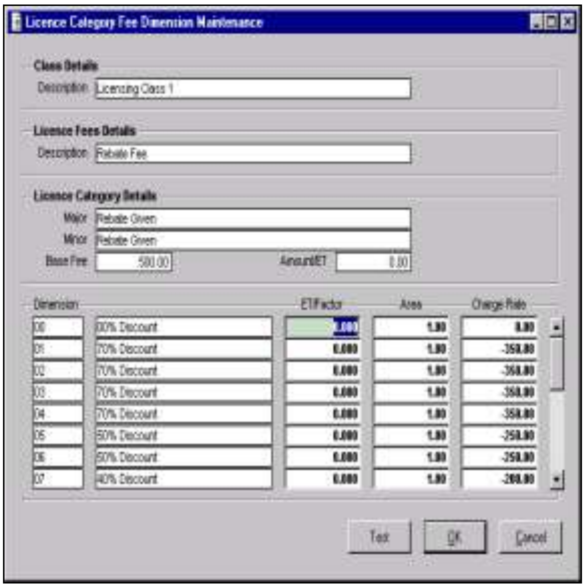


Diagram 8. Licence Category Fee Dimension Maintenance Form.

Against each Dimension the Area value MUST be set to 1. If not, the calculated Fee value will not be correct. This can be verified on the Test Licence Category Fee Calculation form accessed via the Test button.

To apply a discount, the Charge Rate must be set to a negative value which is the amount of the percentage discount to be applied. For example:

Dimension	01	70% Discount	= (Base Fee / 100) * 70
			= (500 / 100) * 70
			= 5 * 70

			= 350
		Charge Rate	= -350
Dimension	09	20% Discount	= (Base Fee / 100) * 20 = (500 / 100) * 20 = 5 * 20 = 100
		Charge Rate	= -100

Licence Fees (Test Licence Category Fee Calculation).

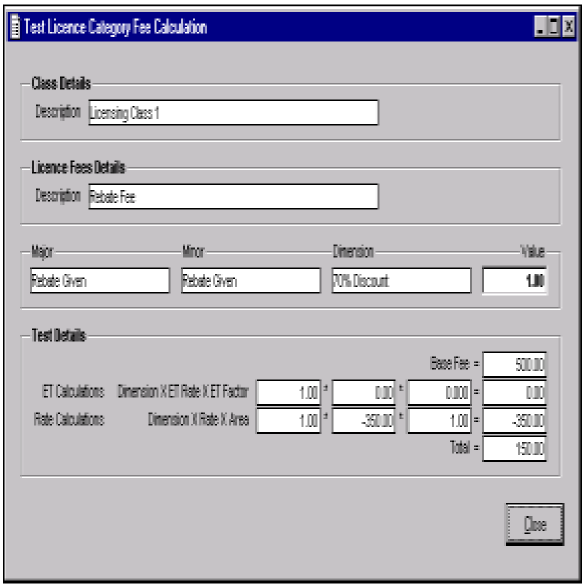


Diagram 9. Test Licence Category Fee Calculation Form.

For each Dimension, test the Fee calculation using the Test Licence Category Fee Calculation form. This forms shows how the Licence Fee is calculated and each of the values used in the calculation. The Dimension Value must be 1 for the discounts to be applied correctly (see Rate Calculations: Dimension * Rate * Area).

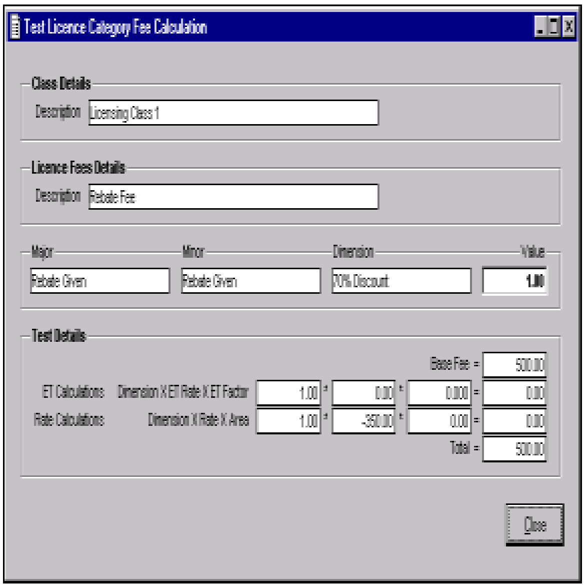


Diagram 10. Test Licence Category Fee Calculation Form.

If the Area of the Dimension were to be assigned a value of zero, instead of one, the Licence Fee calculation would be incorrect as shown in Diagram 10. The Rate Calculations (Dimension * Rate * Area) would return a zero value and no discount would be applied.

Adding a New Licence Fee.

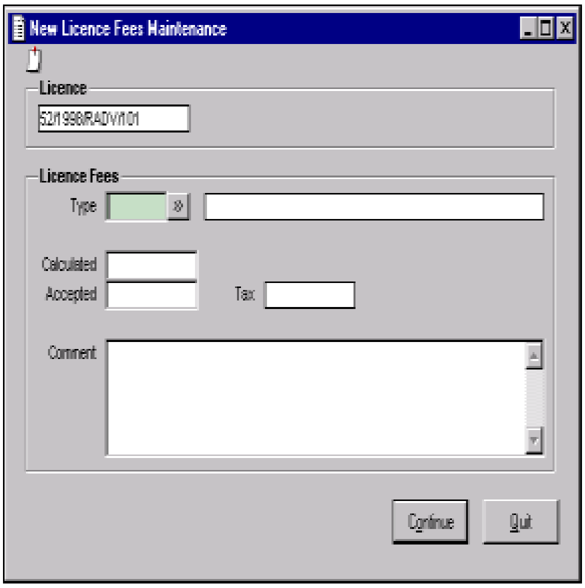


Diagram 11. New Licence Fees Maintenance Form.

To select the required Licence Fee, use the Type Pop Up.

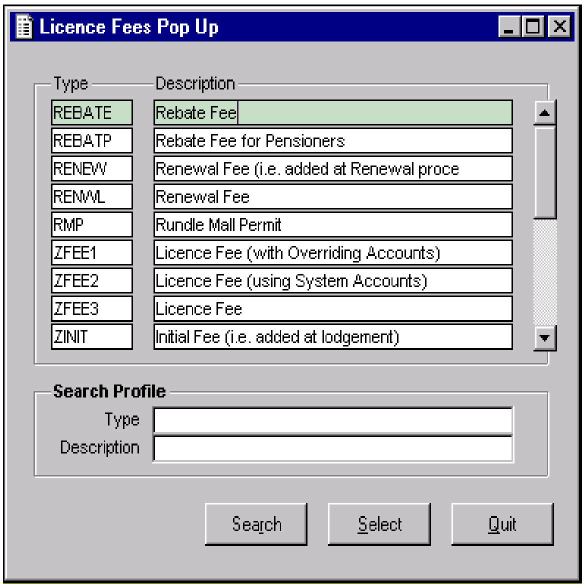


Diagram 12. Licence Fees Pop Up Form.

Select the required Fee from the Licence Fee Pop Up form. In this example, the Licence Fee of 'REBATE - Rebate Fee' was selected.

Major Licence Categories:

When the required Fee is selected from the Licence Fee Pop Up form, the Major Licence Categories Maintenance form will appear.

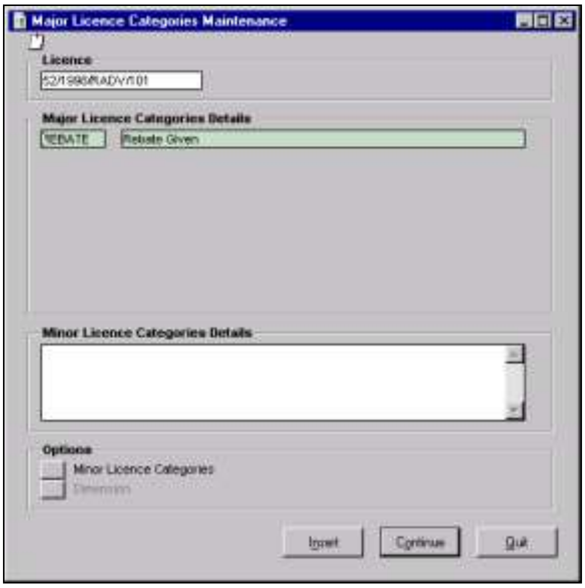


Diagram 13. Major Licence Categories Maintenance Form.

On the Major Licence Categories Maintenance Form, insert the Major Licence Category pertaining to the Licence Fee being inserted. In this example, the Licence Fee is ‘REBATE - Rebate Fee’ so the Major Licence Category is ‘REBATE – Rebate Given’.

Important Note:

Only add one Major Licence Category. The results from the Incentive Fees Report cannot be guaranteed if multiple Major Licence Categories are used.

Minor Licence Categories.

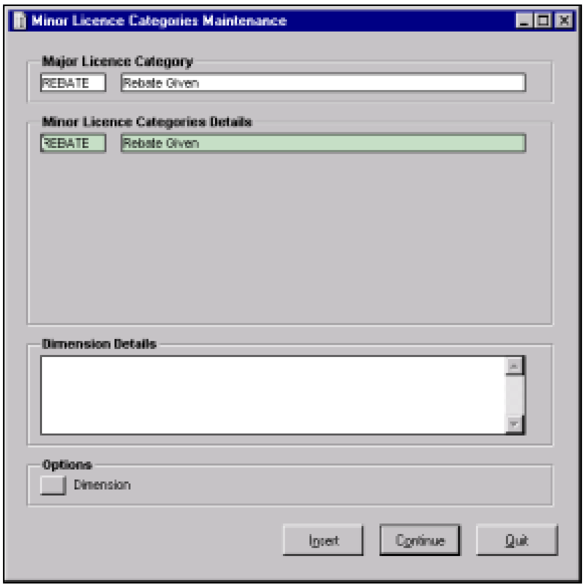


Diagram 14. Minor Licence Categories Maintenance Form.

On the Minor Licence Categories Maintenance Form, insert the Minor Licence Category pertaining to the Licence Fee being inserted. In this example there is only one Minor Licence Category set up for the given Major Licence Category, which is ‘REBATE – Rebate Given’.

Important Note:

Only add one Minor Licence Category. The results from the Incentive Fees Report cannot be guaranteed if multiple Minor Licence Categories are used.

Minor Licence Categories Dimensions.

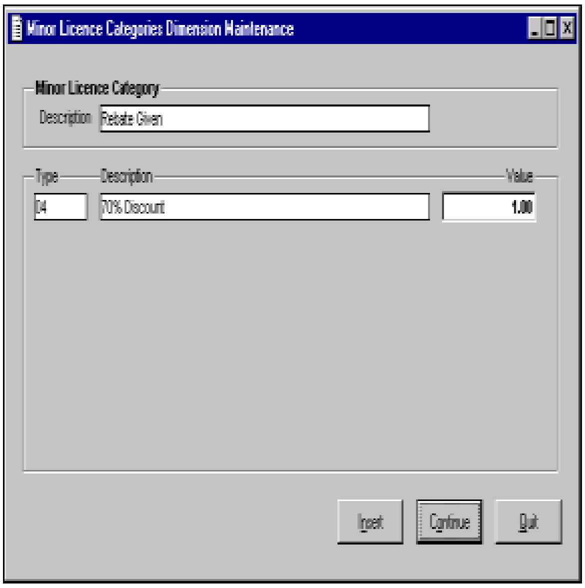


Diagram 15. Minor Licence Categories Dimension Maintenance Form.

On the Minor Licence Categories Dimension Maintenance Form, insert the Dimension that is the 'score' obtained. In this example, the score obtained was 04, which is a 70% discount off the Annual Fee.

Important Notes:
1. The Value of the Dimension added MUST be set to 1.
2. Only add one Licence Category Dimension. The results from the Incentive Fees Report cannot be guaranteed if multiple Licence Category Dimensions are used.

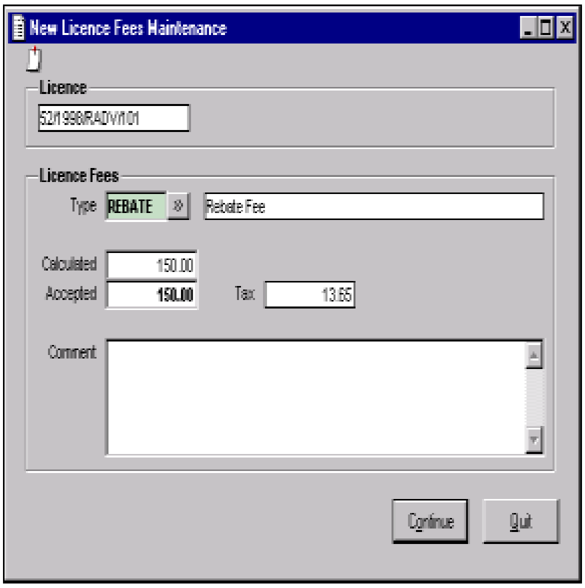


Diagram 16. New Licence Fees Maintenance Form.

On returning to the New Licence Fees Maintenance Form, the calculated amount will be the full Licence Fee value (Base Fee) minus the discount amount. In this example, the discount was 70% or $350.00 hence $500.00 - $350.00 = $150.00.

Licence Fee Maintenance.

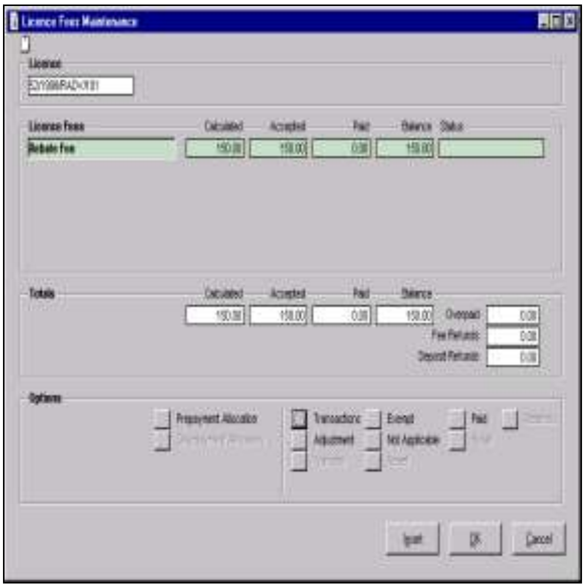


Diagram 17. Licence Fees Maintenance Form.

Important Note:

1. Only add one Licence Incentive Fee to the Licence. The results from the Incentive Fees Report cannot be guaranteed if multiple Licence Category Dimensions are used.

From the Licence Fees Maintenance form, the details of the Fee Transaction can be viewed using the Transactions Option button.

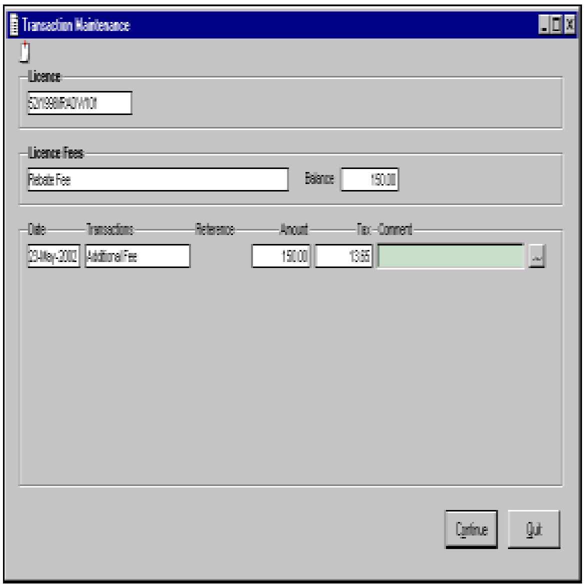


Diagram 18. Transaction Maintenance Form.

For the Licence Fee added, use the detail button on the right hand side to view the calculation details for the selected Fee Transaction.

Calculation Enquiry.

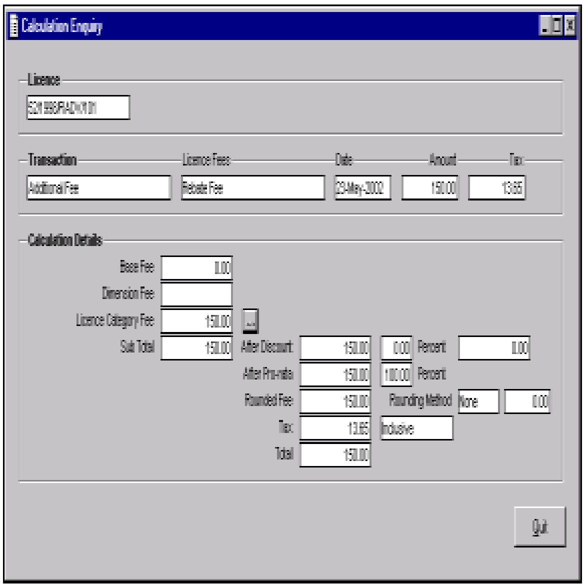


Diagram 19. Calculation Enquiry Form.

The Calculation Enquiry form gives a summary of how the Licence Fee was calculated. In this example, the Licence Fee Base Fee was 0.00, no Dimension Fees were applicable and the Licence Category Fee totalled $150.00. No Discount, Pro-rata or rounding was applied giving the final total of $150.00. To view the Licence Category Fee calculation details, press the detail button on the right hand side of the Licence Category Fee amount.

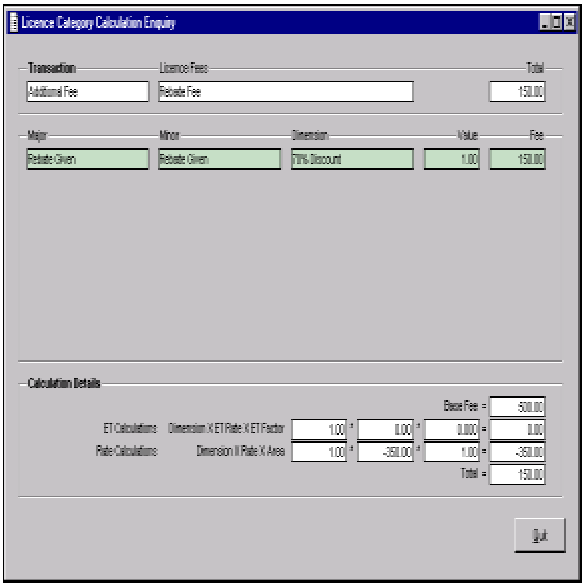


Diagram 20. Licence Category Calculation Enquiry Form.

The Licence Category Calculation Enquiry Form shows how the Licence Category Fee was calculated. In this example, the Licence Category Base Fee was $500.00. The Rate calculation applied a discount of $350.00 giving the total of $150.00.

Multi-Select Pop Up Forms.

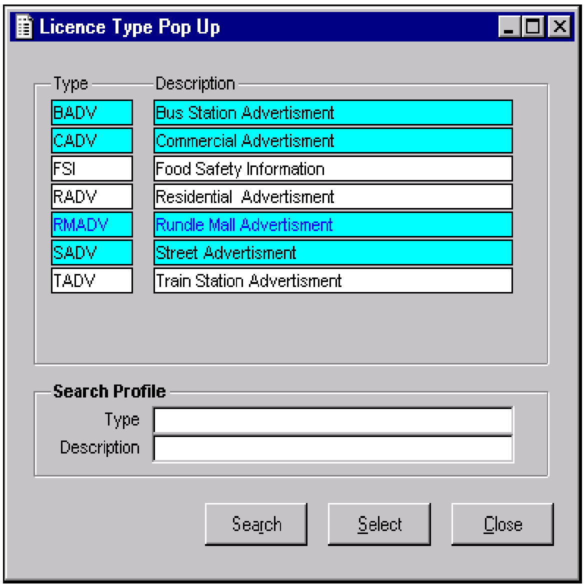


Diagram 22. Multi-select Licence Type Pop Up Form.

The multi-select Pop Up forms can only be accessed via the Pop Up button on the Incentive Fees Report Control form. Unlike normal Pop Ups, the Code field is not maintainable and cannot be directly entered.

Once on the Pop Up form, standard multi-select functionality applies. Using the Ctrl key and the mouse, single occurrences can be selected. Using the shift key and the mouse, multiple continuous occurrences can be selected.

If no occurrences are highlighted (blue as opposed to green) and the select button is pressed, then the current occurrence that had focus (green) is selected.

The multi-select Pop Up fields on the Incentive Fees Report Control form only display one line of detail. If more than one occurrence was selected from the Pop Up, then using the zoom function (double click on the field) will show all the selected occurrences.

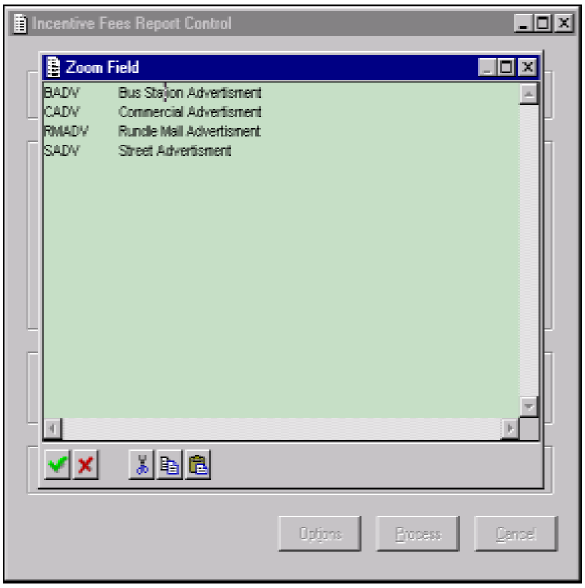


Diagram 23. Zoom Field for multi-select Pop Up fields on the Control form.

If the selected occurrences are not correct and a different selection of occurrences is required, simply press the Pop Up button and select the required occurrences. To remove all selected occurrences, place the focus on the Pop Up field (not the button) and press F11.

Generated Report Details.

The details for the Licences that are extracted on to the report are sorted into the following order:

1. Licence Type.
2. Licence Year (Oldest first i.e. 2000, 2001, 2002).
3. Licence Number (Ascending order i.e. 1, 2, … 100).

The information extracted on the report for a given Licence is shown below in Table 3.

92/1998/RADV/10 1	Formatted Address:	150-WATERLOO CORNER ROAD, EASTWOOD SA	
	Type:	RADV	Residential Advertisement
	Responsible Officer:	DHAYD	David Haydon
	Licence Category:	REBATP	Rebate Given for Pensioners
	Minor Licence Category:	REBATP	Rebate Given for Pensioners
	Licence Category Dimension:	07	40% Discount

	Incentive Reduction Granted					
	Base Fee	Score	Percentage	Rate	Balance	Paid
Rebate Fee for Pensioners:	500.00	07	40% Discount	-200.00	300.00	0.00

Table 3. Generated Report Details for a Given Licence.

As the primary sort order for the Report is by Licence Type, a summary of the Licence Fees for that Type is given after the last Licence of the Type, as shown below in Table 4.

	Total Incentive Reduction Granted For Licence Type RADV					
	Base Fee	Total Licenses:	19	Rate	Balance	Paid
Rebate Fee:	5000.00		10	-2150.00	2850.00	0.00
Rebate Fee for Pensioners:	4500.00		9	-1850.00	2650.00	0.00

Table 4. Licence Fee Summary for each Licence Type.

At the end of the Report, a summary of the Licence Fees for all the Licences on the Report is given as shown below in Table 5.

	Total Incentive Reduction Granted For Licences					
	Base Fee	Total Licenses:	31	Rate	Balance	Paid
Rebate Fee:	8500.00		17	-3850.00	4650.00	0.00
Rebate Fee for Pensioners:	7000.00		14	-2600.00	4400.00	0.00

Table 5. Licence Fee Summary for all Licences.

IMPORTANT ADDITIONAL INFORMATION
** Please note additional functionality has been added to the Licence Type as of 2.13 whereby Licence Categories can be assigned to the Licence Type. For this reporting purpose it is highly recommended that Users can assign the major and minor category at this stage however do not assign the dimension at this level, as if all dimensions are loaded ready to select later, all dimensions will be displayed on the report and all dimensions available to assign will be calculated in the totals.

Therefore leave the assigning of the dimension and value till actual lodgement of the Licence or simply do not assign anything at the type level and load the major, minor category and dimension manual when adding the fee based on the score assessed.

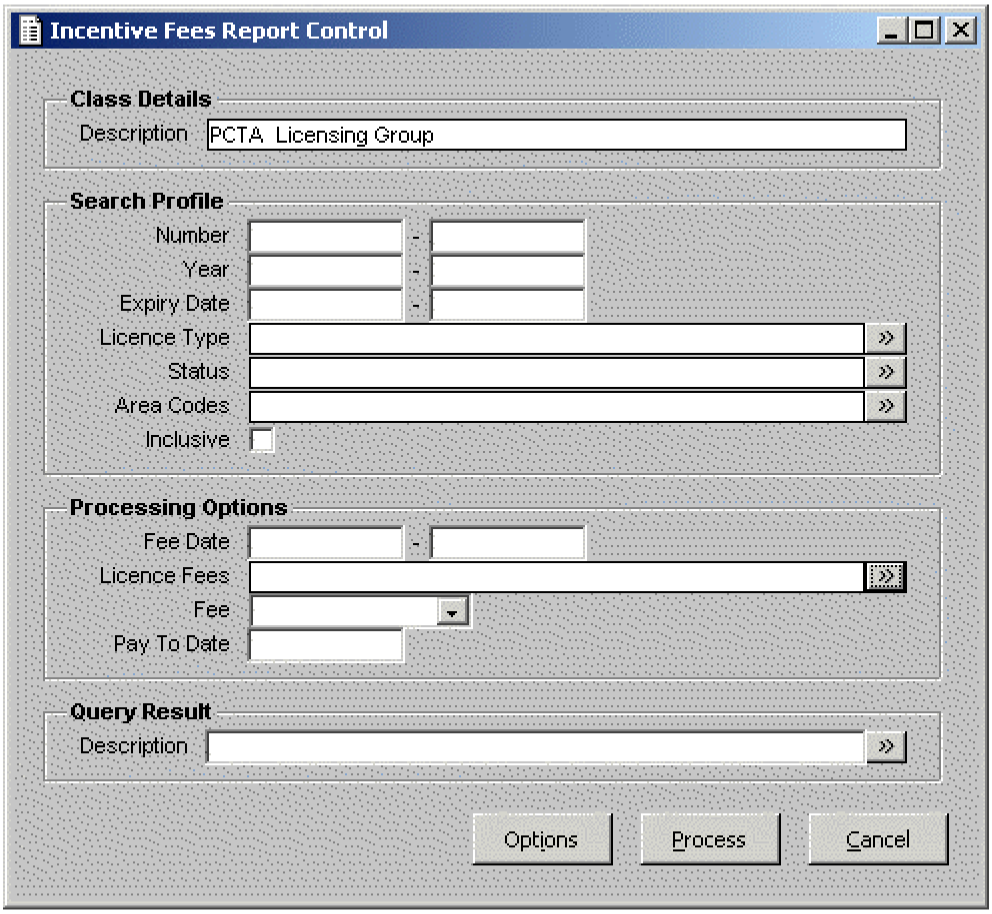
Incentive Fees Report Control Form

The Incentive Fees Report allows for selection of details on which to report on for the Licences. The fields available are those found on the Licensing Maintenance Filter form. Multi-select Pop Up forms are available on the following fields:-

- Licence Type
- Status
- Area Codes
- Licence Fees

The Processing Options details are applied to the Licences found using the Search Profile details or the Query Result. The Licence Fees are mandatory and at least one Licence Fee must be selected.

A date range does not have to be supplied. If no Date Range is used, the transaction date of the Licence Fee is not checked.



Incentive Fees Report Control Form

Class Detail - Description
This field details the name of the Class currently selected.

Search Profile Number
A range of Licence Numbers can be entered if the search is to be refined to a certain range. The Number range fields may be left blank.

Search Profile – Year
A range of Years can be entered if the search is to be refined to a certain year range. The Year range fields may be left blank.

Search Profile – Expiry Date

A range of Expiry Dates can be entered if the search is to be refined to a certain Expiry Date range. The Expiry range fields may be left blank.

Search Profile – Licence Type

Licence Type(s) can be nominated to refine the search. The Licence Type can be selected using the Pop Up form. It is possible to multi-select the Licence Types that are required to be reported on.

Search Profile - Status

Status Code(s) can be nominated to refine the search. The Status Codes can be selected using the Pop Up form. It is possible to multi-select the Status Codes that are required to be reported on.

Search Profile – Area Codes

Area Code(s) can be nominated to refine the search. The Area Codes can be selected using the Pop Up form. It is possible to multi-select the Area Codes that are required to be reported on.

Search Profile - Inclusive

This flag determines the processing applied to the multi-select Pop Ups of Licence Type, Status and Area Codes.

If the flag is turned on, i.e. Inclusive, then the Licence must have a direct match on the Licence Type, Status and Area Code. If the flag is turned off, i.e. exclusive, then the Licence only needs to have one of the values of the Licence Type, Status or Area Code. The results are significantly different! The following example highlights the difference.

Example:	**Available**			**Selected**		
Licence Types:	T1	T2	T3	T1	T2	
Status:	S1	S2	S3	S1		S3
Area Codes:	A1	A2	A3		A2	A3

Licence Number	Licence Type	Status	Area Code	Inclusive (On)	Exclusive (Off)
1	T1	S1	A1		Y
2	T1	S1	A2	Y	Y
3	T1	S1	A3	Y	Y
4	T1	S2	A1		Y
5	T1	S2	A2		Y
6	T1	S2	A3		Y
7	T1	S3	A1		Y
8	T1	S3	A2	Y	Y
9	T1	S3	A3	Y	Y
10	T2	S1	A1		Y
11	T2	S1	A2	Y	Y
12	T2	S1	A3	Y	Y
13	T2	S2	A1		Y
14	T2	S2	A2		Y
15	T2	S2	A3		Y
16	T2	S3	A1		Y
17	T2	S3	A2	Y	Y
18	T2	S3	A3	Y	Y
19	T3	S1	A1		Y
20	T3	S1	A2		Y
21	T3	S1	A3		Y
22	T3	S2	A1		
23	T3	S2	A2		Y
24	T3	S2	A3		Y
25	T3	S3	A1		Y
26	T3	S3	A2		Y
27	T3	S3	A3		Y

Table 2. Results of Inclusive / Exclusive processing multi-select Pop Ups.

As can be seen from the table above, turning the Inclusive flag on or off has a significant impact on the number of Licenses selected. When the Inclusive flag was turned off, only one Licence in the above example (# 22) was not selected and that was because the Licence Type, Status and Area Code fields were all not in the selected lists.

Processing Options – Fee Date

The Fee Date is the Transaction Date of the selected Licence Fee(s). A Date range does not have to be entered. If no Date range is used, the transaction date of the Licence Fee is not checked.

Processing Options – Licence Fees

The Licence Fees are mandatory and at least one Licence Fee must be nominated. The Pop Up can be used to multi-select those Fees required for processing.

For each Licence selected, the Fees are checked to determine if a selected Licence Fee is on that Licence. If not, the Licence details are not extracted. If the Licence Fee transaction date is not within the range specified (if specified), the Licence details are also not extracted. Only the details of the valid selected Licence Fees are extracted.

Processing Options - Fee

The Fee dropdown has the following options available:-

- Paid
- Unpaid
- Both Paid & Unpaid

The Fee option can be used to select Licences of the selected value within a date range nominated.

'Paid' will report only on Licences that have had the fees that are designated as Incentive Fees which have been selected on the control form and have been paid.

'Unpaid' will report only on Licences that have had the fees that are designated as Incentive Fees which have been selected on the control form and have not been paid. Part payments are classed as unpaid as there is still a balance remaining.

'Both' will report on Licences that have had the fees that are designated as Incentive Fees which have been selected on the control form and have been either paid or are still outstanding.

Processing Options – Pay To Date

The Pay To Date is used to calculate lapsed days for unpaid fees since fees have been entered. As the time frame for overdue could differ at each site the Pay To Date is used to calculate the lapsed days based on the the date the fee was actually added to the Licence and calculating up to and including the Date that has been entered into this field. This is then represented as the Lapsed Days.

Query Result - Description

If a Query Result has been created over the LAPAPPL table, then it can be used to produce the Report. Selection of the Pop Up button will display a list of Query Results that can be used.

Owner Names Update Report

Ower Names Update Report Control

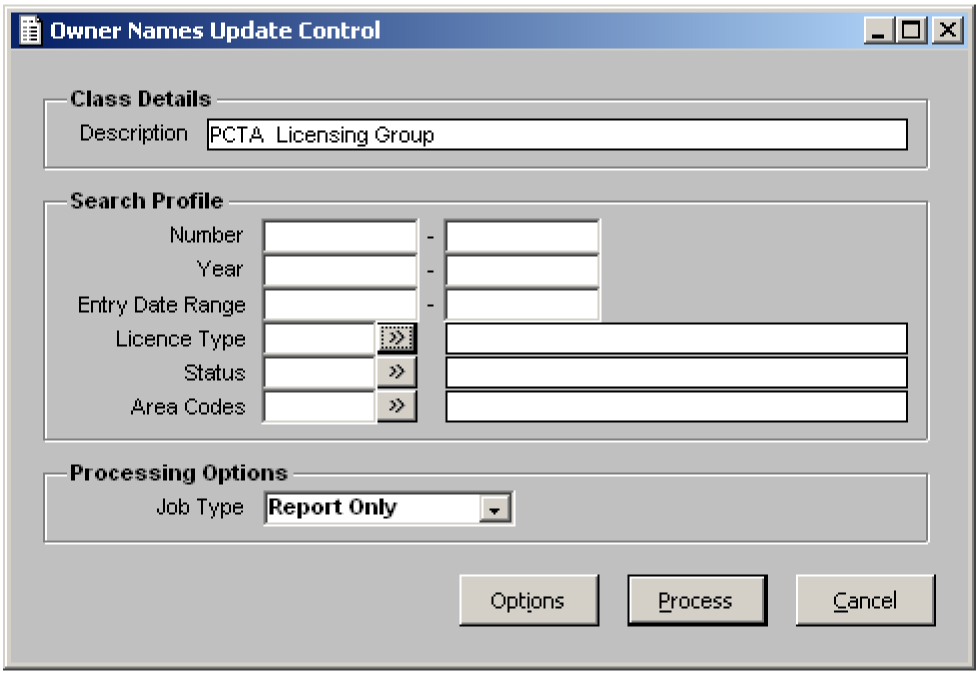
The Owner Names Update Report can be used to ensure that the most recent owner is attached to the Licence Record. This allows the process to be run as a bulk option, and update owner name records in one process.

The Owner Names Update Report will list the new property owners for a Licence as well as the names that will be made historic.

Existing functionality of updating the Owner Names on selection of the Names Maintenance form within Licensing Maintenance remains for those sites who do not wish to use this particular option.

The report can be run in 'Report Only' and 'Update and Report' mode.

The menu is required to be assigned to the relevant class and users who wish to have access to this option via the Licence Class Option - via Class and Group Batch Options.



Owner Names Update Report Control Form

Class Detail - Description
This field details the name of the Class currently selected.

Search Profile – Number
The Licence Number Range may be used to select a particular "from" and "to" range of Licences required for Reporting on. Enter a number in the first field and tab to the second field to enter a "to" number.

Search Profile – Year
The Licence Year Range may be used to select a particular "from" and "to" range of Years required for Reporting. Enter a number in the first field and tab to the second field to enter a "to" Year.

This field can be used in conjunction with the Number field to further refine the selection.

Search Profile – Entry Date Range

The Licence Entry Date Range may be used to select a particular "from" and "to" range of Entry Dates required for Reporting. Enter a date in the first field and tab to the second field to enter a "to" Entry Date.

This field can be used in conjunction with the other fields within the Search Profile area to further refine the selection.

Search Profile – Licence Type

The Licence Type is used to select the particular Licence Type required for this Report Selection.

The Licence Type Pop Up Button may be used to select a particular Licence Type if the Licence Type Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Type and Click OK.

This field can be used in conjunction with the other fields within the Search Profile area to further refine the selection.

Search Profile – Status

The Status Field is used to select the particular Status of Licence required for this Report Selection.

The Status Pop Up Button may be used to select a particular Status if the Status Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Status and Click OK.

This Field can be used in conjunction with the other fields within the Search Profile area to further refine the selection.

Search Profile – Area Codes

The Area Code is used to select the particular Area Code required for this Report Selection.

The Area Code Pop Up Button may be used to select a particular Area Code if the Area Code is not known. Clicking on the Pop Up Button provides a list for selection. Select an Area Code and Click OK.

This field can be used in conjunction with the other fields within the Seach Profile area to further refine the selection.

Processing Option – Job Type

The Job Type defaults to Report Only mode. This can be changed to Report and Update when the process is required to update the Owner Names.

When run in Report Only mode, the Owner Names Update Report will list the new property owners for a licence as well as the names that will be made historic.

When run in Report and Update mode, the Owner Names Update Report will list the new property owners that have been added for a licence as well as the names that have been made historic on the Licence.

Responsible Officer Reassignment

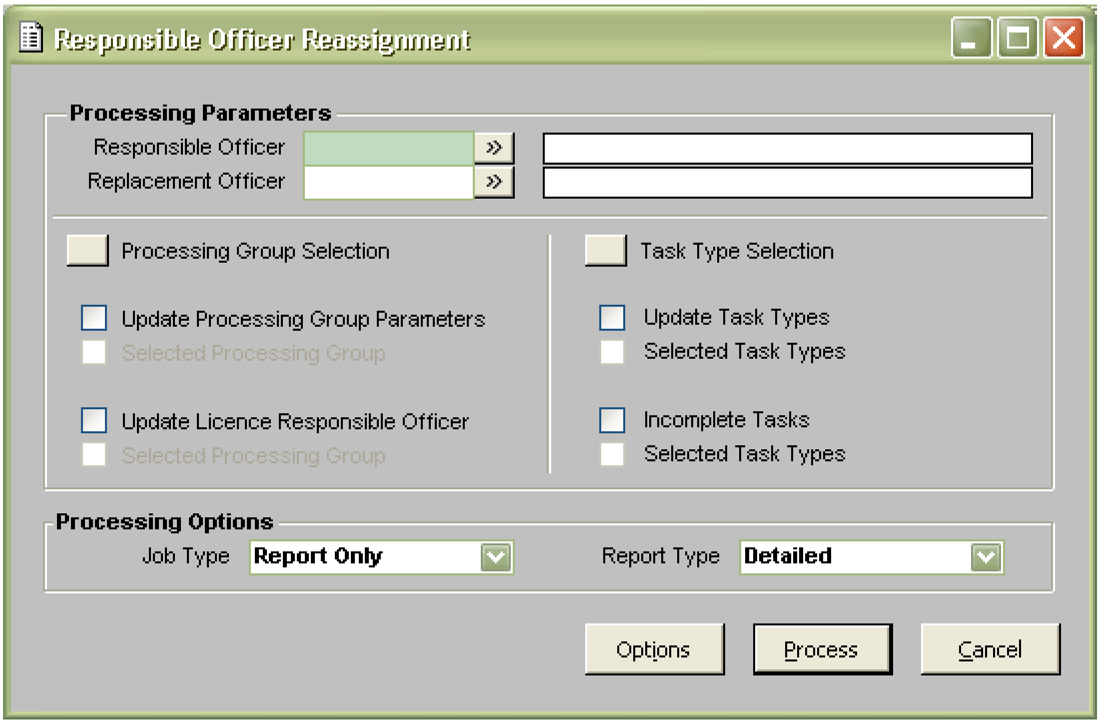
Responsible Officer Reassignment Control

The use of this menu is controlled by the Authorised Function and will not display if the authority has not been given to the option.

This menu allows the bulk assigning of a Responsible Officer for the module itself and also assign against specific workflow Tasks for the module a differenct Responsible Officer.

The Responsible Officer on the records will be replaced with the nominated Replacement Officer.

Note that it is possible update the Parameters, Licence and Workflow in the one process or run the processes individually.



Responsible Officer Reassignment Form

Processing Parameters – Responsible Officer

The Responsible Officer that is to be replaced is nominated in this field. The User can be entered directly into the field if known or the pop up used to display a list of Officers to select from.

Processing Parameters – Replacement Officer

The Replacement Officer is nominated in this field. The User can be entered directly into the field if know or the pop up used to display a list of Officers to select from.

Processing Group Selection

Specific Processing Groups (Areas) for each Class can be selected by clicking this option. This will display the Areas Code Selection form where Areas can be selected or removed.

Update Processing Group Parameters

When “Update Processing Group Parameters” is selected for Update then all the Processing Group (Area) Parameters will be processed. If the ‘Selected Processing Group’ option is flagged ON as well as this field then only the selected Processing Groups (Areas) nominated within the Processing Group Selection are processed.

NOTE: Where the nominated Responsible Officer being removed was flagged as the Primary Officer then the Replacement Officer will be flagged as the new Primary Officer.

Selected Processing Group
The Selected Processing Group field is only available for selection if the ‘Update Processing Group Parameters’ option has been flagged ON and there are Processing Groups (Areas) selected within the Processing Group Selection display. Otherwise this field is dimmed and not available for use.

If this field is flagged ON then only the selected Processing Groups (Areas) nominated within the Processing Group Selection are processed.

Update Licence Responsible Officer
When “Update Licence Responsible Officer” is selected than all Licences with the nominated Responsible Officer will be processed and have the Replacement Officer added (if not already on the Licence). If the “Selected Processing Group” option is flagged ON as well as this field then only Licences with the selected Processing Groups (Areas) nominated within the Processing Group Selection and the nominated Responsible Officer are processed.

Licences with a Final Approval Decision are not processed. Each License processed is checked and if the Licence’s latest decision is flagged as ‘Final Approval’ (set in the Licence Decision or Consent Decision parameters) then the Licence will not be processed.

NOTE: Where the nominated Responsible Officer being removed was flagged as the Primary Officer then the Replacement Officer will be flagged as the new Primary Officer.

Selected Processing Group
The Selected Processing Group field is only available for selection if the ‘Update Licence Responsible Officer’ option has been flagged ON and there are Processing Groups (Areas) selected within the Processing Group Selection display. Otherwise this field is dimmed and not available for use.

If this field is flagged ON then only Licences with the selected Processing Groups (Areas) nominated within the Processing Group Selection are processed and have the nominated Responsible Officer removed and replaced by the nominated Replacement Officer.

Task Type Selection
Specific Task Types for each Class can be selected by clicking this option. This will display the Task Type Selection form where Task Types can be selected or removed.

Update Task Types
When “Update Task Types” is selected for Update then all the Task Types will be processed. If the ‘Selected Task Type’ option is flagged ON as well as this field then only the selected Task Types nominated within the Task Type Selection are processed.

NOTE: Where the nominated Responsible Officer exists on the Task Type it is removed. The Replacement Officer nominated **WILL NOT** update the Task Type.

Selected Task Types
The Selected Task Type field is only available for selection if the ‘Update Task Types’ option has been flagged ON and there are Task Types selected within the Task Type Selection display. Otherwise this field is dimmed and not available for use.

If this field is flagged ON then only the selected Task Types nominated within the Task Type Selection are processed.

Incomplete Tasks
When “Incomplete Tasks” is selected than all Incomplete Licence Tasks with the nominated Responsible Officer will be processed and have the Replacement Officer added as the Task’s User.

If the "Selected Task Types" option is flagged ON as well as this field then only Incomplete Tasks for the selected Task Types nominated within the Task Type Selection and with the nominated Responsible Officer are processed.

Selected Task Types

The Selected Task Type field is only available for selection if the 'Incomplete Tasks' option has been flagged ON and there are Task Types selected within the Task Type Selection display. Otherwise this field is dimmed and not available for use.

If this field is flagged ON then only Incomplete Tasks for the selected Task Types nominated within the Task Type Selection are processed.

Processing Options – Job Type

The Process can run in Report Only or Report and Update. The Report and Update mode will update the records, whilst the Report Only mode will produce reports on the process that will occur when run in Update mode.

Processing Options – Report Type

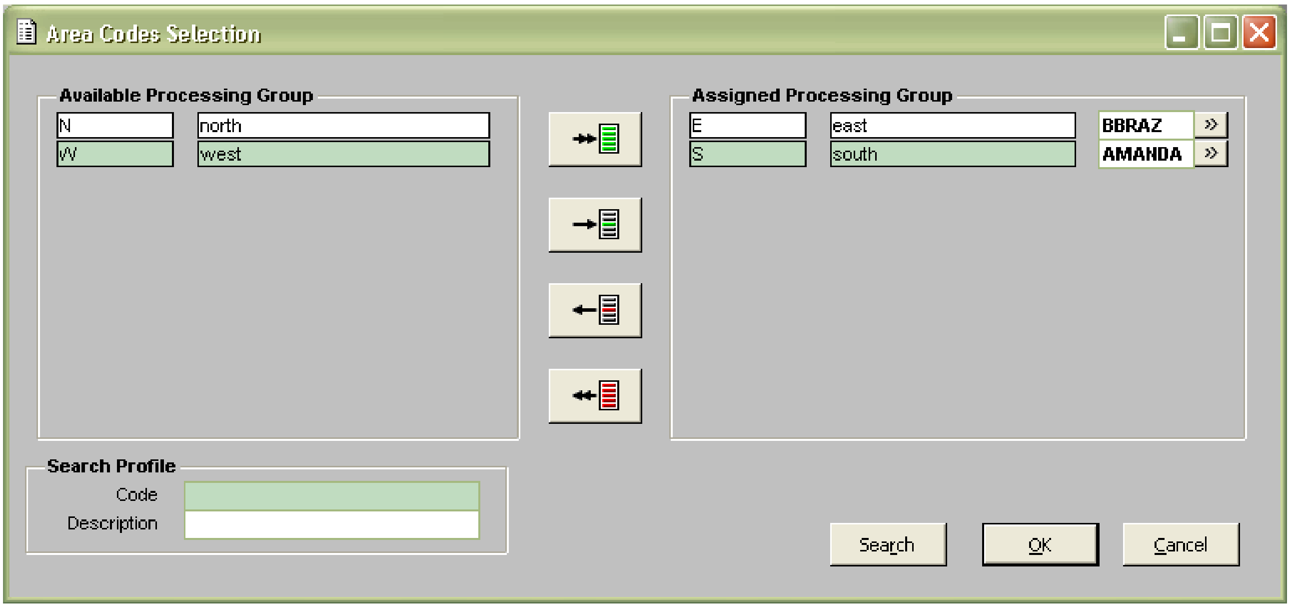
The Report Type field is used mainly for the Workflow Tasks process. This will produce a report in Summary mode which will display just the Task Type and the number of Tasks to be updated. When Detailed is selected then the Report displays the full detail with regard to the Licence Number, Task Type etc. that is being replaced.

Area Codes Selection

The Area Codes Selection is displayed when the Processing Group Option has been selected from the Responsible Officer Reassignment form.

This displays all the Areas for the Licence Class. The select/remove buttons can be used to assign or deassign the Areas to be included in the update process.

Note that when an Area is assigned that the nominated Replacement Officer is automatically defaulted against that Area. If there is a requirement to change this Replacement Officer for just that Area then the required Replacement Officer can be entered into the field.



Area Codes Selection Form

Available Processing Group

This displays the available Areas for the the selected Licensing Class.

Assigned Processing Group

This shows the Areas that have been assigned (or selected) for updating along with the Replacement Officer that will be used in the process.

Note that when an Area is assigned that the nominated Replacement Officer from the Responsible Officer Reassignment display is automatically defaulted against that Area. If there is a requirement to change this Replacement Officer for just that Area then the required Replacement Officer can be entered into the field. The pop up can be used to display a list of available users.

Search Profile - Code

If the display of Available Areas is large then the Search Profile Code field can be used to refine the display. Enter in the required Area Code or part thereof and initiate a Search. The Code(s) matching the entered criteria will be displayed in the Available area.

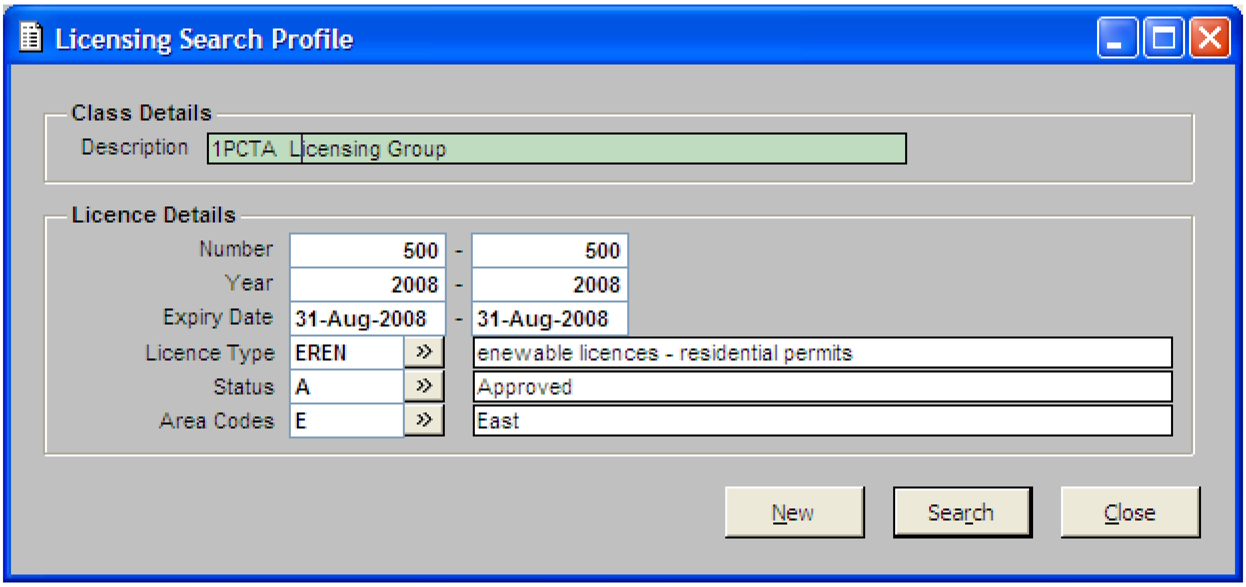
Search Profile - Description

If the display of Available Areas is large then the Search Profile Description field can be used to refine the display. Enter in the required Area Description or part thereof and initiate a Search. The Description(s) matching the entered criteria will be displayed in the Available area.

Licencing Search Profile

Licencing Search Profile

This form is reached via the Licence Inspection Maintenance menu and filtering by Licences.



Licensing Search Profile

Licensing Search Profile - Class Details
This field displays the Description of the selected Class of Licences – it is not maintainable here.

Licensing Search Profile - Number
Enter the beginning Licence number in the 'From' field and the end Licence number in the 'To' field the liceneces within the range of numbers and within other filters will be selected. These fields may be left blank if required.

Licensing Search Profile – Year
Enter the first Year number in the 'From' field and the end Year number in the 'To' field. The licences that fall between those years and within other filters will be selected. These fields may be left blank if required.

Licensing Search Profile – Expiry Date
Enter in the first Expiry Date in the 'From' fiels and the last Expiry Date in the 'To' field. The licences that fall between those dates and withing other filters will be selected. These fields may be left blank if required.

Licensing Search Profile – Type
The Licence Type required should be entered here – the full code may be entered or using the pop up button the user may select from a list. This field may be left blank if required.

Licensing Search Profile – Status
Enter in the required Status of the licences here – the status code may be entered or using the pop up button the user may select from a list. This field may be left blank if required.

Licensing Search Profile – Area Codes
Enter in the required Area Code here – the area code may be entered or using the pop up button the user may select from a list. This field may be left blank if required.

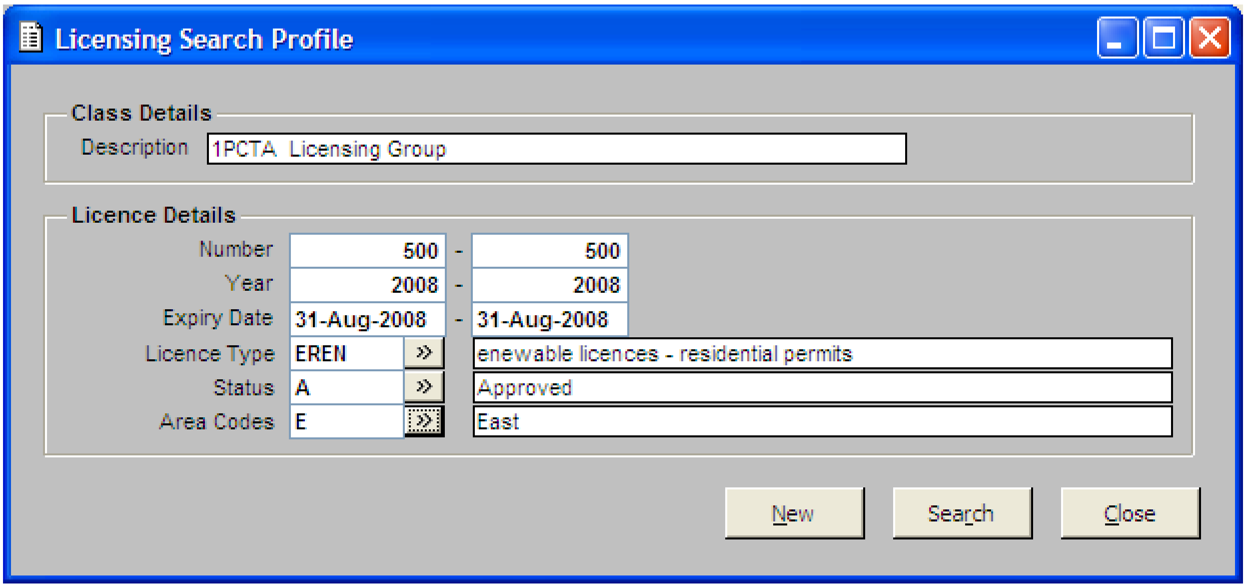
Licence Timesheet Entry

New timesheet entry functionality has been provided to allow quicker entry of timesheets for work performed on Applications and Licences.

NOTE: The new Timesheet Entry function will be available only to sites that have the required authority. Contact your Account Manager if your site requires this new functionality.

TIMESHEET PARAMETER MAINTENANCE

This new parameter option (Workflow > Timesheet Entry > Timesheet Week) has been provided to allow the site to set how their Timesheet week is determined e.g. Monday to Sunday or Monday to Friday etc. This parameter will be used when displaying the relevant Timesheet Records in the new Timesheet Selection form.



Licensing Search Profile

USER PARAMETER MAINTENANCE

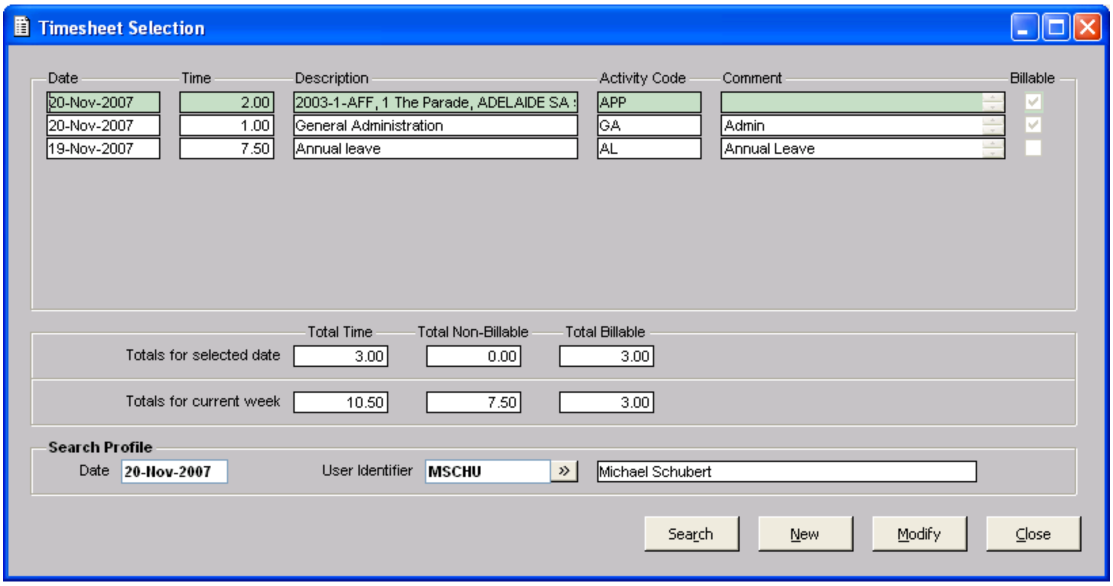
This existing parameter option (Workflow > User Parameter Maintenance) has been enhanced to allow each user to have their own a Default Activity set. When timesheet entries are being entered for a user in the new Timesheet Entry form their Default Activity will be automatically loaded into the entry.

TIMESHEET ENTRY

This new function is accessed from the new Workflow > Timesheet Entry > Timesheet Entry option.

Timesheet Selection form

Selecting this option presents the Timesheet Selection form. This form will not show any timesheet entries initially; the User Identifier field will be automatically set to the user that is signed on.



Pressing the Search button will load the timesheets for the nominated user for the week pertaining to the nominated Search Profile date - if no date is nominated then the current date is used. The system will interpret this date based on the value entered in the Timesheet Week parameters and display the records for that week for that particular user. The latest entries will be displayed at the top of the form.

There are two ‘totals’ lines:-
1) Totals for selected date:

- This shows the total of the timesheet entries for the timesheet entry line that has focus.
- If there is a timesheet entry for the Search Profile date then the first entry for that date will get focus automatically upon pressing Search and thus show the total time for that date. If this is not the case then no entry line will get focus leaving the totals empty.

2) Totals for current week:

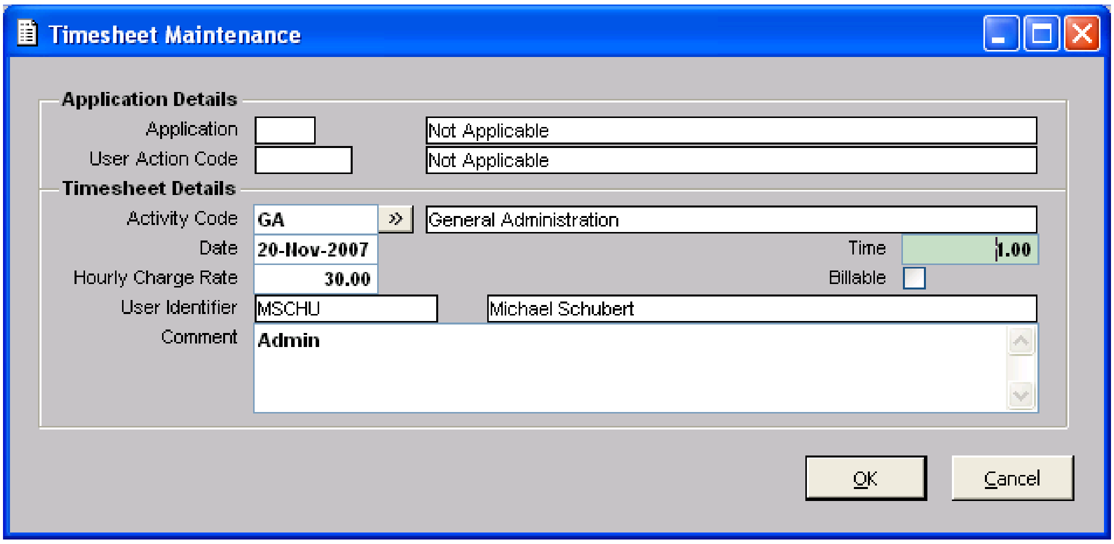
- This shows the total of the timesheet entries for the week as dictated by the nominated Search Profile date.

Note:-
If the nominated date is not within a Timesheet Week when Search is pressed, a message is shown on the message line and the entered date is highlighted. If there are no entries for the week then a message is shown in the message line.

Pressing the Modify button for an existing entry will show the standard Timesheet Maintenance form. Pressing the New button will present the new Timesheet Entry form.

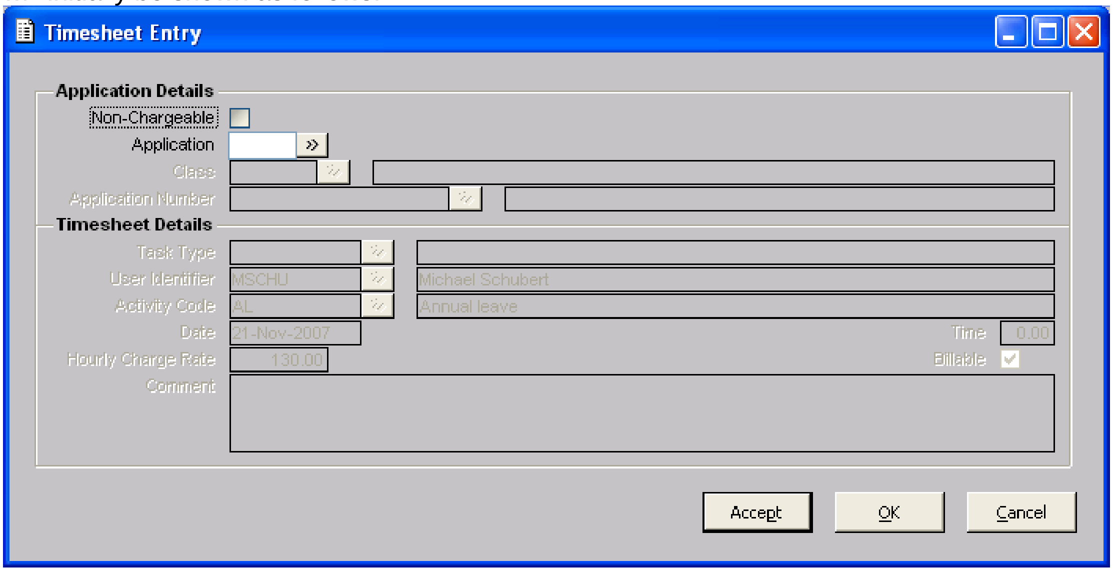
Timesheet Maintenance form

Pressing the Modify button on the Timesheet Selection form will show the standard Timesheet Maintenance form. Note: The Entry will not be able to be maintained if the Timesheet Entry is for a Task which is Completed.



Timesheet Entry form

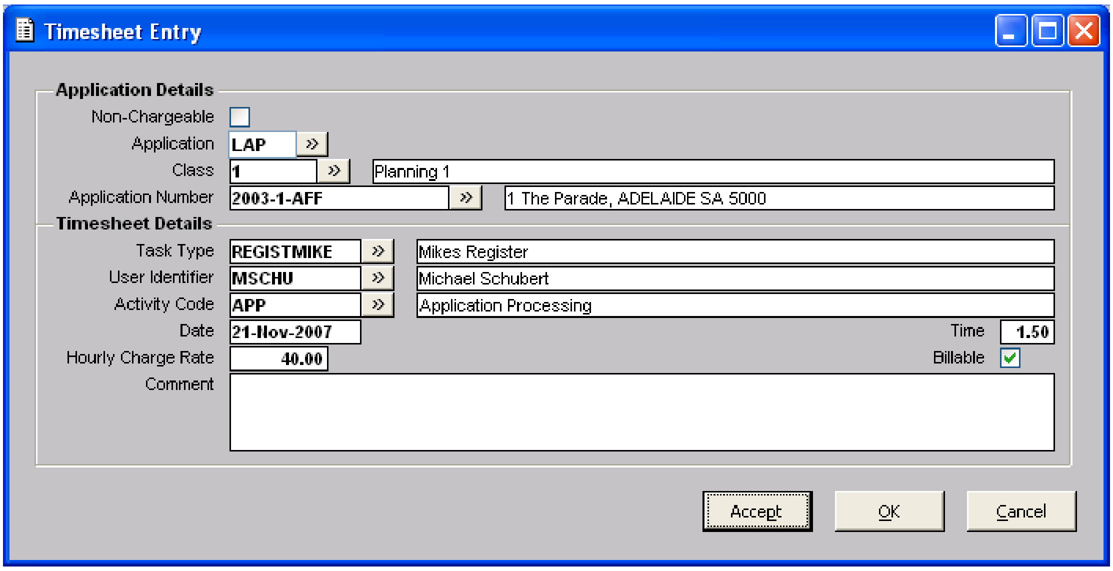
Pressing the New button on the Timesheet Selection form will present the new Timesheet Entry form, and it will initially be shown as follows:-



Timesheet entries can be entered for a specific Application/Licence or not as governed by the setting the Non-Chargeable checkbox – this also controls which fields are relevant for entry. By leaving the Non-Chargeable checkbox unchecked details can be entered for a specific Application/Licence. By checking it on 'Non-Chargeable' entries can be entered, in which case the cursor is automatically placed into the Activity Code field.

Entering details for a specific Application/Licence

The following will occur when entering details for a specific Application/Licence (i.e. the Non-Chargeable checkbox is unchecked). An entry with all the details entered looks as follows. Note that fields are only shown when previous fields have had details entered or chosen (e.g. the Application Number can not be entered until the Class has been nominated).



The Application can be chosen by entering ‘LAP’ or ‘LLC’ or by using the Popup/double clicking in the field. Once a valid code is present the Class field is made available.

The Class can be chosen by entering the Class code or by using the Popup. Only Classes the user is authorised to can be entered. Once a valid code is present the Application Number field is made available.

The Application Number can be chosen by entering certain details of the Application/Licence Number or by using the Popup. If the Application Number is to be entered directly into the field it is to be entered in the format of ‘Number/Year/Type’ (i.e. having ‘/‘ separators between each identifier). For example, to enter details for Application Number 1 enter ‘1’; to enter details for Application Number 1 and Year 2007 enter ‘1/2007’. Details can be entered with any number of the identifiers; e.g. details could be entered as ‘/2007/AT1’ which would cause the Application/Licence Selection form to be displayed showing all the Applications for the 2007 Year of the AT1 Type. If the entered details can be resolved to a specific Application the formatted Application Number is loaded into the field. Where there is more than one occurrence of the number such as would be the case with Staged or Amended numbers, the user would be presented with the Application/Licence Selection form to choose the correct record. Note: The formatted Application Number loaded to the form may be in different format to the ‘Number/Year/Type’ entry format as governed by the formatting parameters. Therefore if the Application Number chosen is to be changed the user must enter the new details in the ‘Number/Year/Type’ entry format.

The Task Type can be chosen by entering the code or by using the Popup. Only Tasks that have been defined in the parameters as a Timesheet Task can be entered / chosen. A Timesheet Task is denoted by the Task having any action associated to it that has ‘Time Recording’ ticked on.

When leaving the Task Type field the form checks the status of that Task on the nominated Application/Licence. The following scenarios can occur:-

1) The Task is not found on the Application or it is found but it is Completed.

In this case the user is asked if they wish to create a new occurrence of that Task.

Answering ‘Yes’ will attempt to create an entry of that Task against the Application/Licence and start the Task which will cause the existing Timesheet Maintenance form to be presented allowing Timesheet details to be entered. Once the task actions have been completed the new Timesheet Entry form is redisplayed with the Application and Class retained and the Application Number etc. cleared for the next entry.

If the user does not have authority to Insert Tasks then an error message will be shown and the timesheet entry can not be proceeded with.

The Task that was created will be positioned within the existing set of Tasks for the Application/Licence according to the Class’s Workflow ‘Task Sequence’ parameter. If this parameter is set to ‘As Entered’ then the new task will be created as the first Task of the Application/Licence so that it is shown at the top of the of the list of workflow Tasks.

Answering 'No' will not create an entry of that Task, and will clear out the Application Number and Task and position the cursor in the Application Number field.

2) The Task is on the Application and is Started but not Completed.

In this case the timesheet entry can be entered in the bottom half of the form. See further details in the next section that describes the functionality available in the bottom half of the form.

If the Task has multiple Actions which have Time Recording checked On then the timesheet will be linked to the first Action of the Task as per existing functionality. In this instance the 'Additional User Actions may also require Timesheets. Access these Actions through Task Maintenance' warning message will be shown per existing functionality.

3) The Task is on the Application but is not Started.

In this case the Task will be started allowing timesheets to be entered as part of that task. Once completed the new Timesheet Entry form is redisplayed with the Application and Class retained and the Application Number etc. cleared for the next entry.

Entering details in the bottom half of the form.

Details are entered in this part of the form when:-
1. Timesheet entries are not being entered for a specific Application/Licence or,
2. Timesheet entries are being entered an Application/Licence and the nominated Task is already started but not yet completed.

The User Identifier is defaulted to the User nominated on the Timesheet Selection form. The user can then be changed on the Timesheet Entry form and will be retained until the Timesheet Entry form is exited. Based upon the User selected the form will load the Default Activity and Hourly Charge Rate as set in the User Parameter Maintenance. Where no default Activity has been set the field will be left blank with the ability to key directly into the field or selected.

An Activity must be entered when a timesheet is not being entered for a specific Application/Licence. If details are being entered for a specific Application/Licence then an Activity must be entered if the Class has the Mandatory Activity parameter checked on (this parameter is within the Application/Licence Parameters menu option - in the Workflow > Work Flow Application Maintenance parameter).

The Date field defaults to the current date but can be changed. If a date is changed it will remain until the user returns to the menu or changes it to a different date. This allows users to continuously key a number of timesheets for any given date without having to continually change the date. If a date is entered that does not fall within the defined Timesheet Week then a warning message is issued when the Accept or OK buttons are pressed, allowing the user to accept the entry or to correct it.

Hourly Charge Rate is set to zero if Non-Chargeable is checked on, and reset to the default rate for the nominated User if Non-Chargeable is checked off.

The Billable flag is defaulted checked off if Non-Chargeable is checked on, and checked on if Non-Chargeable is checked off. If it is changed to be off for a Chargeable entry the Hourly Charge Rate is set to zero.

A Comment must be entered when a timesheet is not being entered for a specific Application/Licence. If details are being entered for a specific Application/Licence then a Comment must be entered if the Class has the Mandatory Comment parameter checked on (this parameter is within the Application/Licence Parameters menu option - in the Workflow > Work Flow Application Maintenance parameter).

<u>Other</u>

Once details have been entered they can be accepted by pressing the Accept button, the F6 button or the OK button as follows:-

- Pressing the Accept button or F6 button will validate the entry and if correct store the details, then show the ‘Timesheet Entry added’ message and refresh the form for the next entry. In the case where an entry was made for a specific Application/Licence some of the entered details will be retained for the next entry (e.g. the Class, Application Number, Task Type, etc.). The Activity Code and the Hourly Charge Rate will be refreshed to the defaults for the User. The Time, Billable and Comment fields will be reset ready for the next entry. Retained details can be changed for the next entry or the Non-Chargeable field can be used to change the entry mode thus causing certain fields to be cleared.
  Note: The Task Type is retained in certain circumstances, but is cleared when the Class is changed as the actual Task Type for one Class is difference to a Task Type for another Class even though the two Tasks may have the same code.
- Pressing the OK button will validate the entry and if correct store the details and return to the Timesheet Selection form.

To allow quicker entry, tabbing from one field to the next has been enabled so that the tab button only needs to be pressed once to move to the next input field. This is useful for those fields which have a Popup button – for example, when a Class code has been entered into the Class field the tab button only has to be pressed once for the cursor to be placed into the Application Number field.