Applications User Guide

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Pathway 3.09 (Thick Client Version)

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Overview

The Applications System enables the recording of data associated with the lodgement and processing of Building, Development, Subdivisions and other general applications.

Parameter codes and their titles are User Definable thus allowing greater flexibility in the design of the system.

For those sites using Consents to handle processing of applications, use of Building AND Development Classes is not required. The Development process can accommodate both.

Once the Lodgement process has entered the Application information, the Council may perform ongoing maintenance on the data such as recording of fees, allocation of tasks to specific officers and record Council or officer decisions on the approval of the application. This information can then be presented in report form suitable for council and the public.

The Applications System accesses the Property Administration System to link Applications to specific properties by the lodgement process and to the Core Word Processing System to enable letters, certificates and notice documents to be generated and printed both interactively and via batch processing. The Applications System also accesses the Name and Address Register to record Applicants, Builders, Private Certifiers and other Name Types.

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.

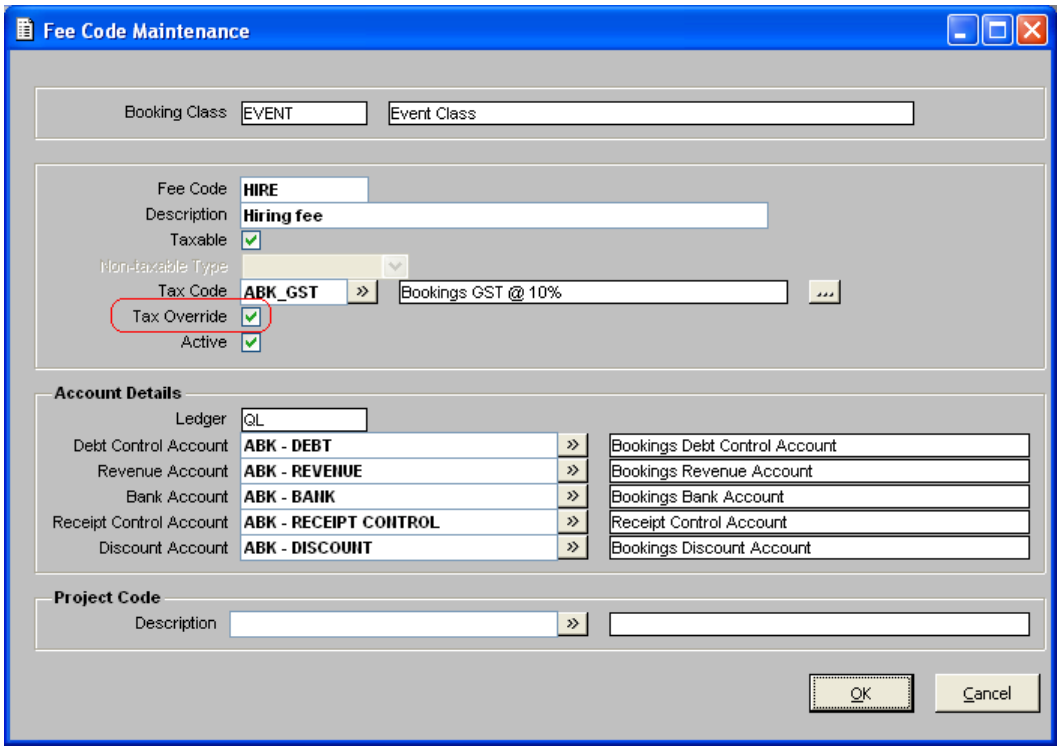
  Fees added prior to 01/10/10 but invoiced on or after 01/10/10 will NOT be cater for and will result in a tax rate of 12.5% being applied instead of the 15% required by the time of supply.

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's 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's 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.

Tax Control - Applications

System Accounts (per Class)
Taxable ON/OFF fag - If any charge that is to be raised within this Application 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.

Application 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.

Contribution 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 Contribution 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 Application Accounts, or Contribution Accounts if the Fee relates to S94 Contributions.

Can only be overridden to OFF at Fee Code level if Taxable ON/OFF flag is set to ON at the Account level

Inclusive/Exclusive
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.

Applications
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 Application 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 Application 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's (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 LAP (accrual) or LAPR (receipts).

Application Class

The following topics are covered in this section:

Overview
Application Classes

Class Set Up

This parameter defines the type of application system you wish to establish, eg. Building, Planning, Development Applications.

The Class Parameter also determines security access to various functions within the system.

All other parameters are defined “below” the Class Parameter. For instance if two classes are established eg. a Building Class and a Planning Class then all other parameters need to be established for each individual Class.

For Council’s using Consents to handle processing of Applications, use of both Building Class and Planning Class is not required as the Development process can accommodate both.

Application Classes

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

Examples of Application Classes could be:-

- Building Applications
- Development Applications
- Tree Lopping/Removal

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

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

The following functions are available for each Class:-

- Maintenance/Enquiry Options
- Parameter Options
- Authorities
- Batch Functions

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

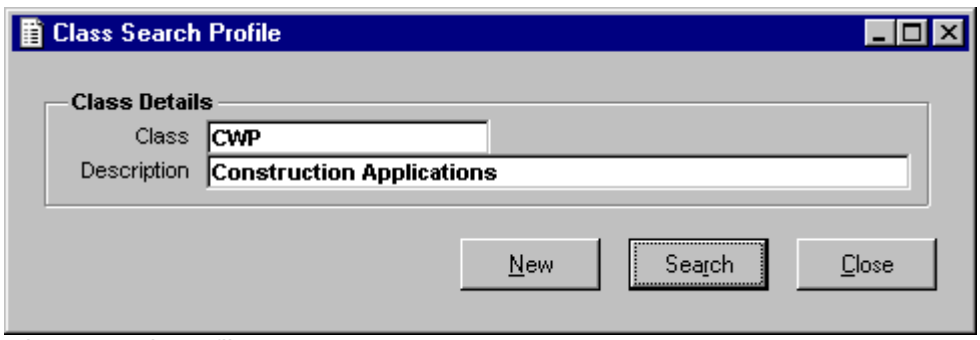
Class Search Profile Form

Once the Class Filter Button is selected from the Applications 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 Search button to search for the Class.

If no data is entered into either the Class or Description fields and the Search Button is clicked on then the Class Selection Form will be displayed. The User may select the required Class from the Class Selection 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.

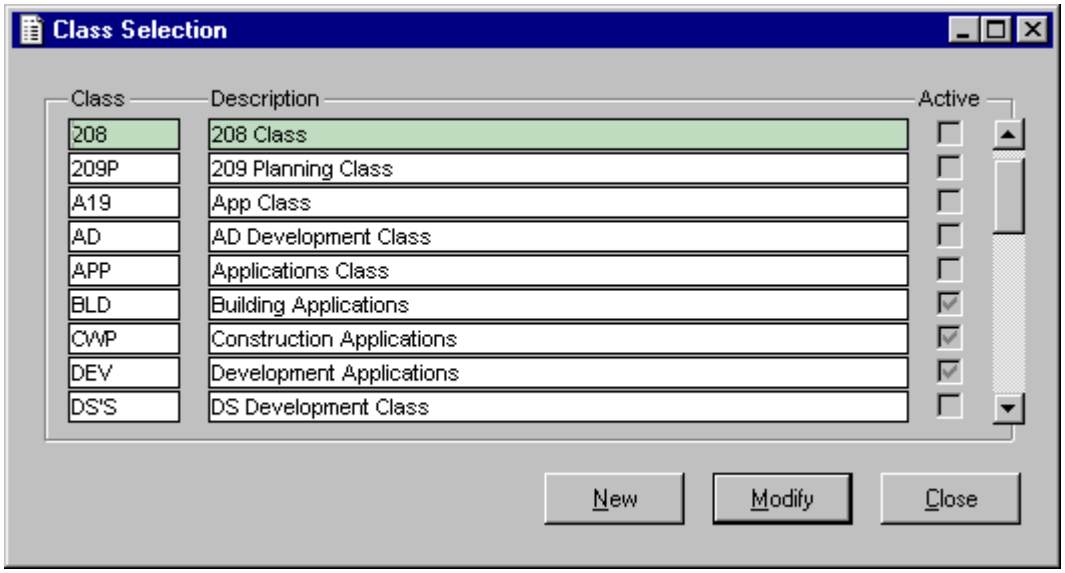


Class Search Profile Form

Class Details – Class
Enter a Class Code if known on which to base the search.

Class Details – Description
Enter a Description if known on which to base the search.

Class Selection Form

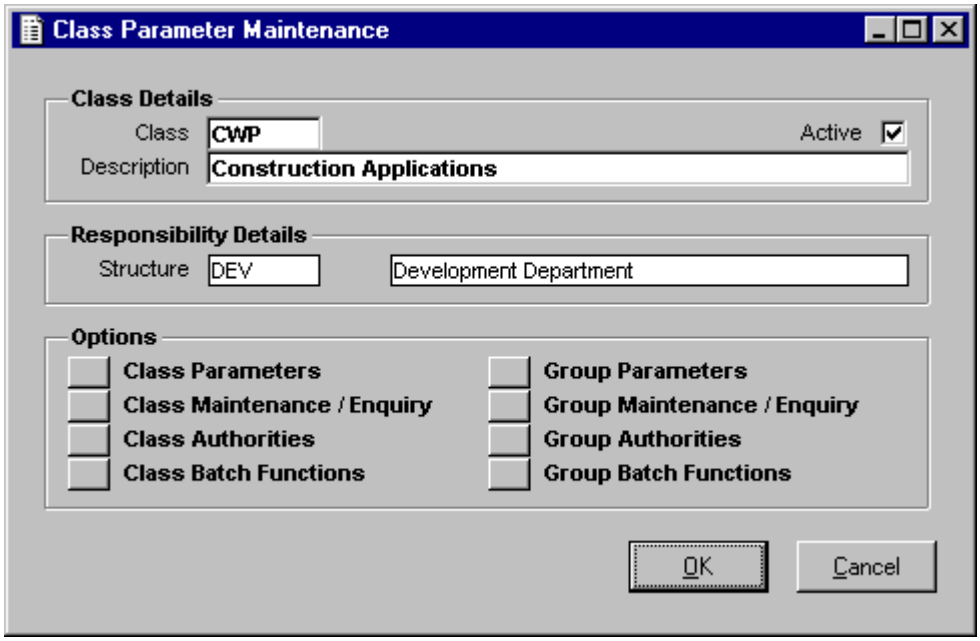


Class Selection Form

Class and Description
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.

Active
The Active Flag will be checked on if the Class has been made active within Class Parameter Maintenance. If this flag is checked on then the Class is available for use.

Class Parameter Maintenance Form



Class Parameter Maintenance Form

Class Details - Class
Class Details require the entry of a 6 digit alpha numeric name for the new Class.

Class Details - Description
A Description line is provided to give a detailed comment regarding the Class.

Class Details - Active
If this box is checked on, the Class will be available for use within the Applications System.

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

Note: If you make a Class inactive it is recommended that you change all other parameters that use this Class.

Responsibility Details

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

Options
Options has six buttons which contain parameters to be set to allow or disallow specific options for this class. By pressing 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 Application 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 Application Class. The Selected Options can be Re-sequenced, 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.

Group Parameters/Group Maintenance/ Enquiry and Group Authorities

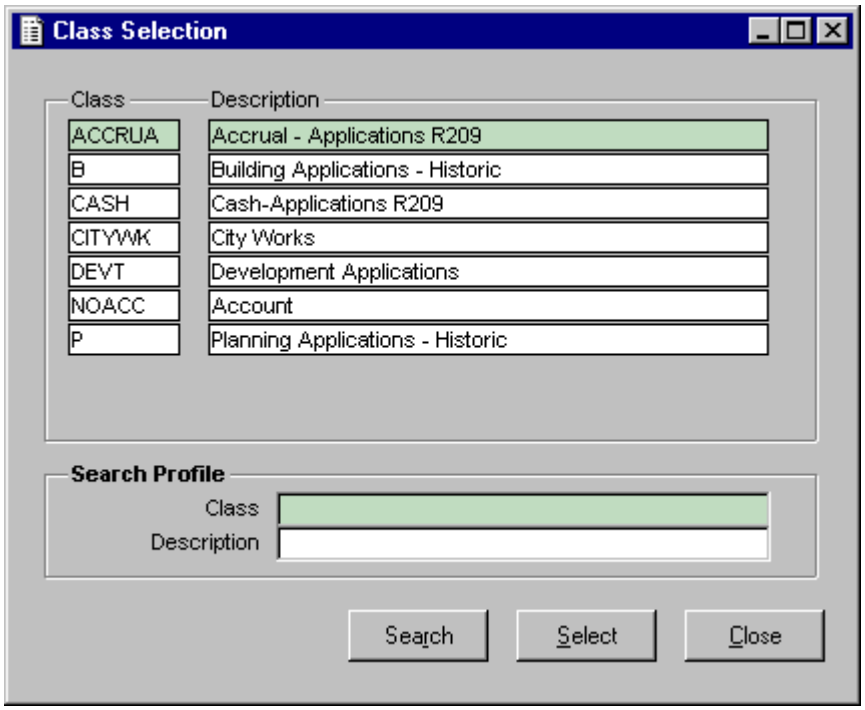
The Options allow the Authorisation of each User within the Council to have access to specific functions within the class. This is part of the Responsibility System and details pertaining to this will be documented in that specific Manual.

Class Batch Functions
The Options allow the assignment of Batch Functions.
Batch Functions 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.

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.

Class Pop Up Form



Class Pop Up Form

Class
This field details the Code Assigned to a Class.

Description
This field details the full Description of the Class.

Search Profile - Class
This field allows for the entry of all or part of a class with the appropriate operand to search on.

Search Profile - Description
This field allows for the entry of part or full Description for searching upon. Once details entered, the Search button should be selected to proceed with the Search.

Parameters

The following topics are covered in this section:

Parameter Options
Processing Group
Status
References
Dimensions
Extension Reason
Miscellaneous Data
System Parameters
Application Fee
Contribution Plan Fees
Deposits
Cashier Warning
Decisions
Authority
Rejection Reason
Consent
Building Classifications
Building Materials
Building Components
Work Types
Building Types
Name Roles
Memo Types
Condition Groups/Types
Letter Extract
Merge Types
Response
Permits & Certificates
Development Category
Numbering Code
Application Type
Municipality Code
Workflow

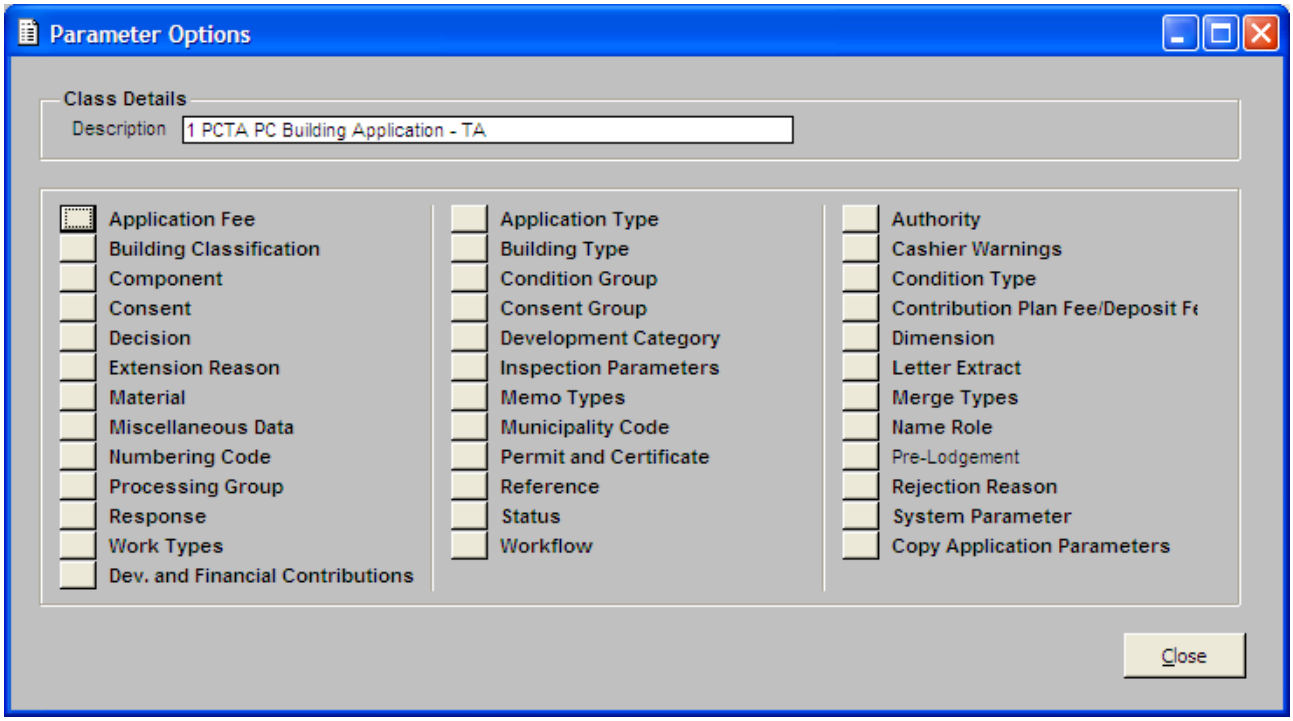
Parameter Options

When the Application Parameter Menu option has been selected then the Options available for the Class that has been nominated are displayed on the Parameter Options form. This form then allows the User to maintain, create or remove data that is applicable to that Class. Information setup from the form is then available for use within the various menus available for Applications.

Parameter Options Form

The Parameter Otpions Form allows the User to maintain, create or remove data that is applicable for the Class that has been selected. Information setup in this Menu is then available for use within the various menus available for Applications.

Those Options that already have data defined are Bolded, those Options still to be defined are not bolded.



Parameter Options Form

Class Details - Description
This field displays the Class Description.

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

Processing Group

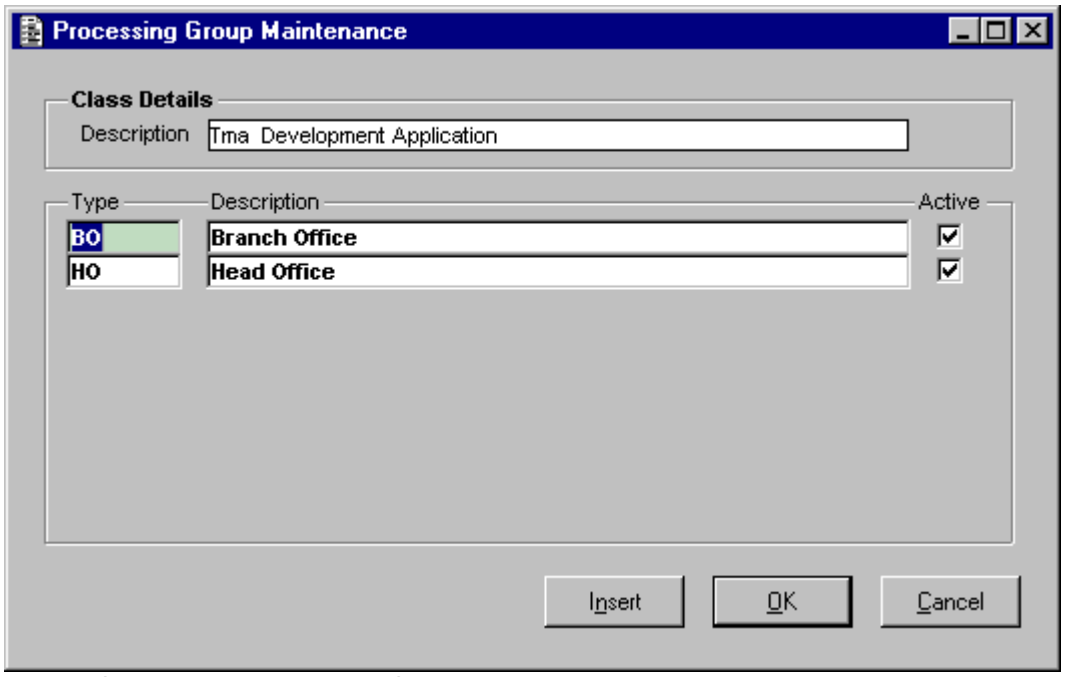
One or many processing groups may be established. At least one should be created.

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

Ledger Codes may also be overridden at the Processing Group level. This parameter is not mandatory.

Processing Group Parameter Maintenance Form

This form is used to enter your Processing Groups (Branch locations).



Processing Group Parameter Maintenance Form

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

Type
This field contains the type code you wish to assign to the Processing Group. It may be up to six alphanumeric characters long.
This field is mandatory.

Description
This field contains the description for the Processing Group.
This field is mandatory.

Active
If this box is checked on, the Processing Group will be available for use within the Applications System.
If this box is checked off the Processing Group will no longer be available for assigning to parameters. Any existing records that use this Processing Group will remain accessible.

Note: If you make a Processing Group inactive it is recommended that you change all other parameters that use this Processing Group. eg. Application Type parameter.

Status

Status Codes are User Definable and may be established to reflect the major “stages” of progress in the “life cycle” of an Application.

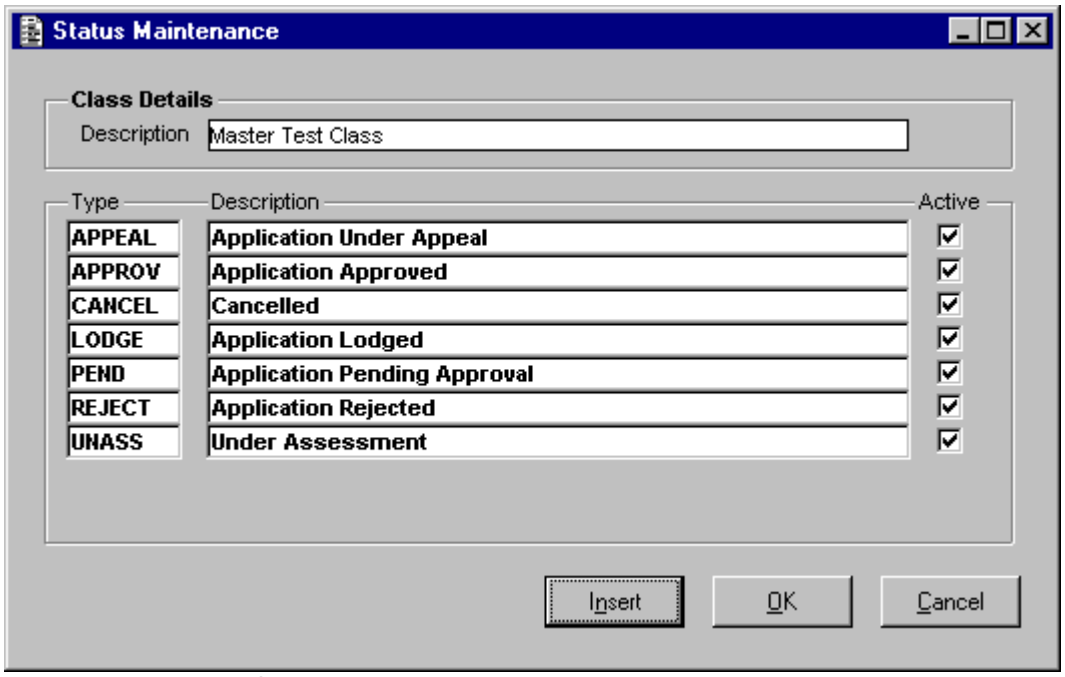
Status Codes may be used as a reporting and enquiry mechanism.

A Lodgement Status Code is mandatory. This Status Code is automatically set at the point of lodgement of an application when an Application Type is nominated.

This parameter is used to reflect the current status of an application. The status code on an application 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 Parameter Maintenance Form

Class Details
This field contains the description of the Class of application 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 Applications System.
If this box is checked off the Status Code will no longer be available for assigning to other parameters or applications. 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.

References

References are used as alternative access paths to application data. For example if you wish to access applications via a Decision Number then a Reference Type will need to be established.

Reference Type Maintenance Form

This form is designed to allow the addition of References that may be linked to an Application. These References can be used as a further means of identification and another Search Criteria for finding an Application.

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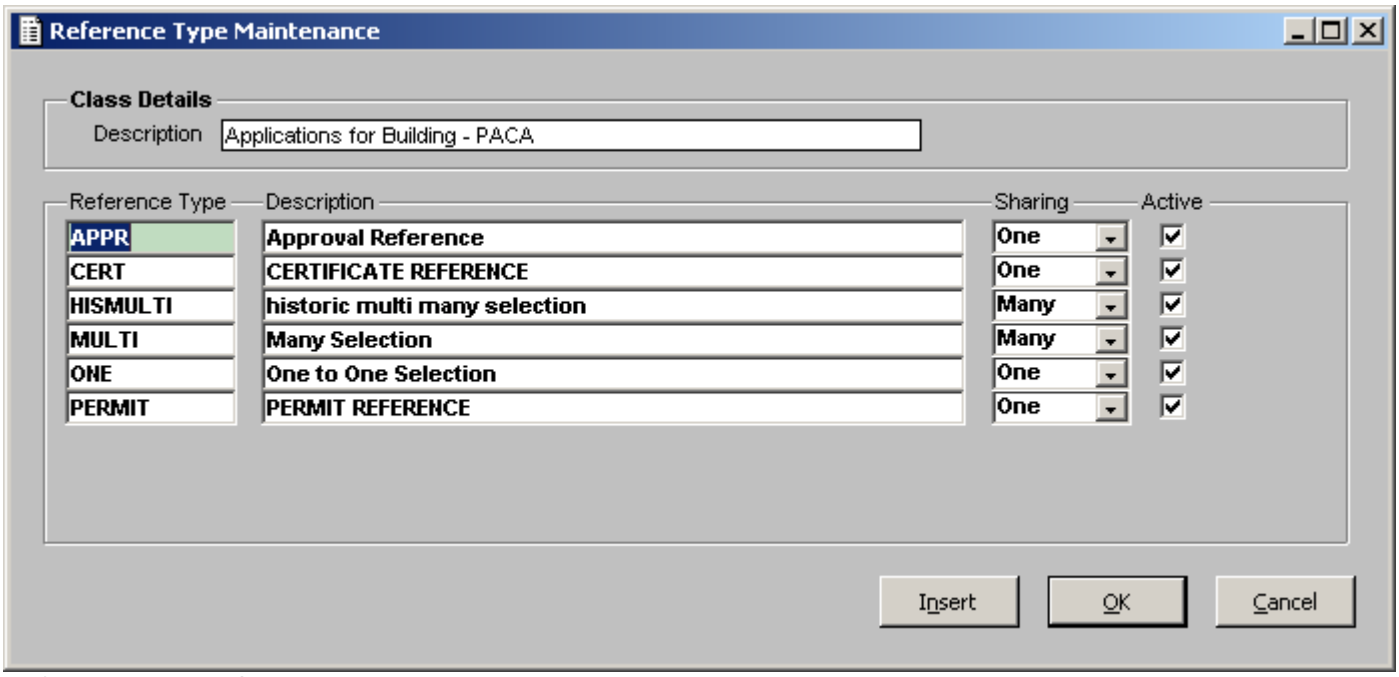


Reference Type Maintenance Form

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 Applications.

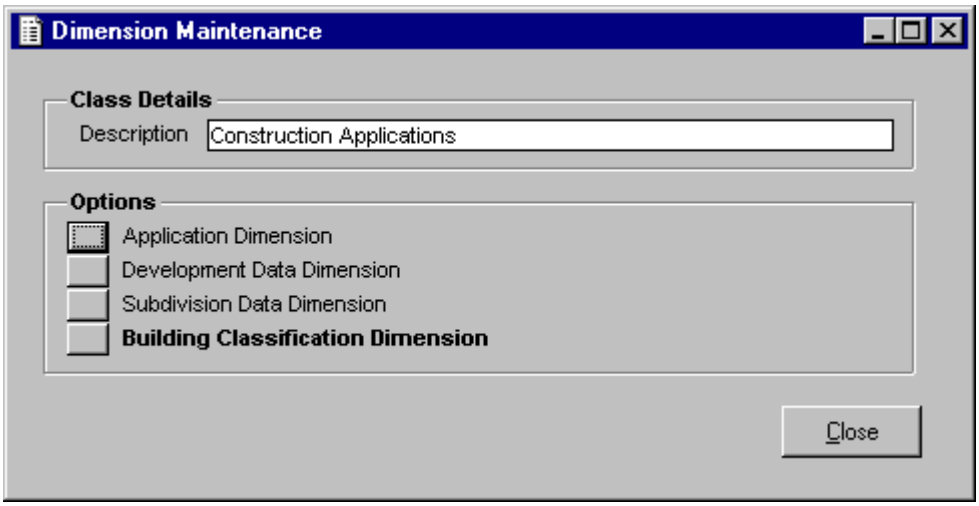
Description
This field is a full description of each Code.

Sharing
This field displays the value that will decide if a Reference Code may be entered once only with one Application or against Many Applications. If the option is set to One, then this Reference, may only be added against one Application. If the option is set to Many, then this Reference, may be added against multiple applications.

Active
If this box is checked on, the Reference Type will be available for use within the Applications System.
If this box is checked off the Reference Type will no longer be available for assigning to Applications. Any existing records that use this Reference Type will remain accessible.

Dimensions

Dimension Maintenance Form



Dimension Maintenance Form

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

Options – Application Dimension
Selecting the Application Dimension Button displays the Application Dimension Maintenance Form.

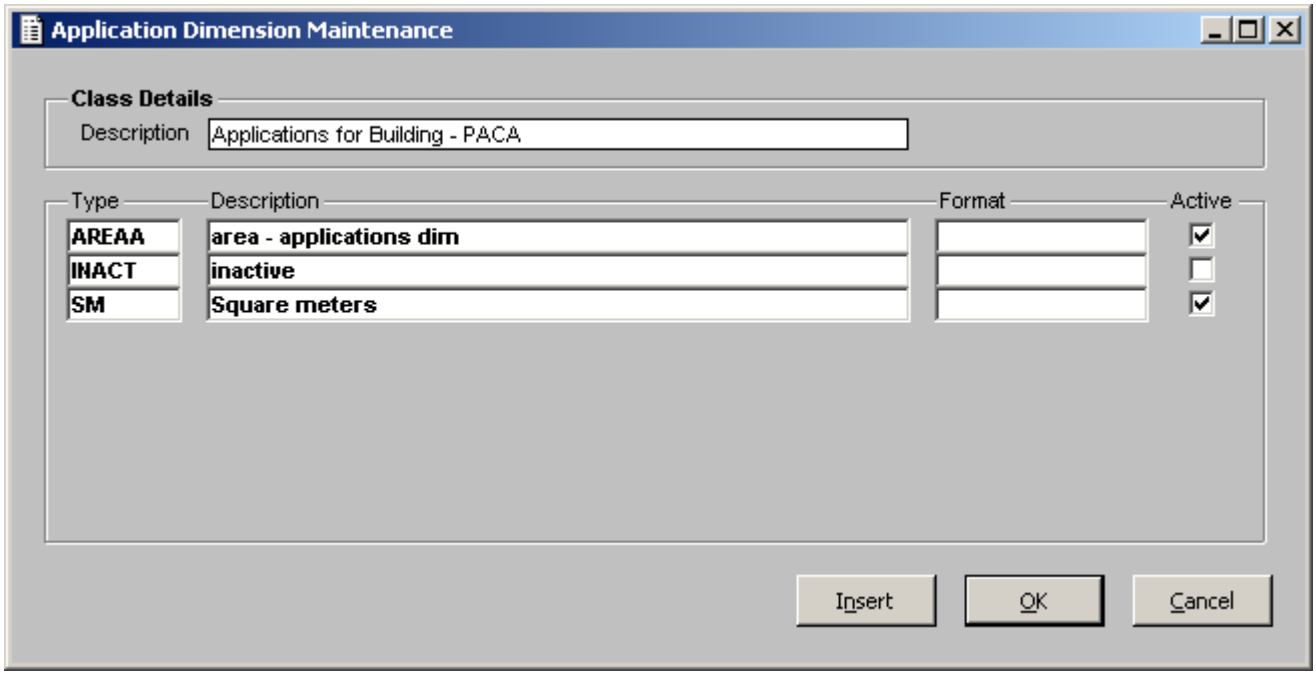
Options – Development Data Dimension
Selecting the Development Data Dimension Button displays the Development Data Dimension Maintenance Form.

Options –Subdivision Data Dimension
Selecting the Subdivision Data Dimension Button displays the Subdivision Data Dimension Maintenance Form.

Options – Building Classification Dimension
Selecting the Building Classification Dimension Button displays the Building Classification Dimension Maintenance Form.

Dimension Maintenance Form

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



Dimension Maintenance Form

Class Details - Description
This field describes the Class that is current. The Description field is display only and may not be maintained.

Type
This field is used to enter a Code that a Dimension can be recognised by 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 up to a certain value. Refer to the Table following for an 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.

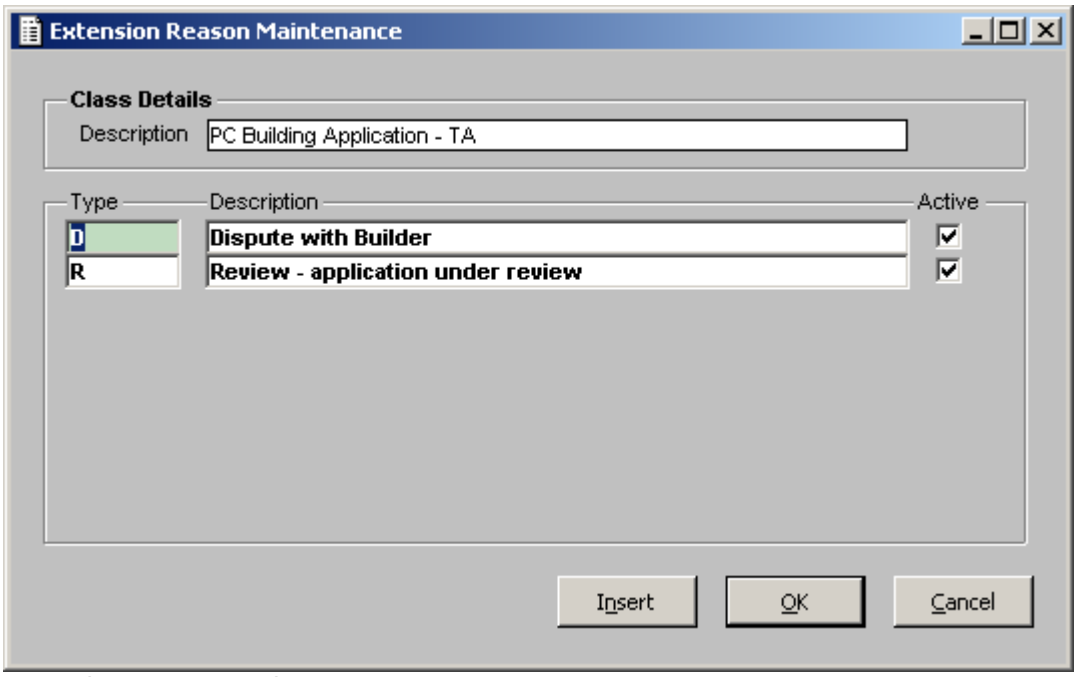
Active
If this box is checked, then the Dimension is Active and can be selected in the Maintenance Forms. If the box is not checked then the Dimension can not be selected during Maintenance of an Application.

Extension Reason

This parameter allows entry of Reason Codes and Description to be used within the Extension Maintenance within Application Maintenance.

Extension Reason Maintenance Form

This form enables the creation and maintenance of Extension Reasons.



Extension Reason Maintenance Form

Class Details - Description
This field contains the description of the Class of application to which you are assigning Extension Reason Codes.
This field is display only and may not be maintained.

Type
The Reason Type Code is entered or maintained in this field.

Description
The description for the Reason Type Code is entered or maintained in this field.

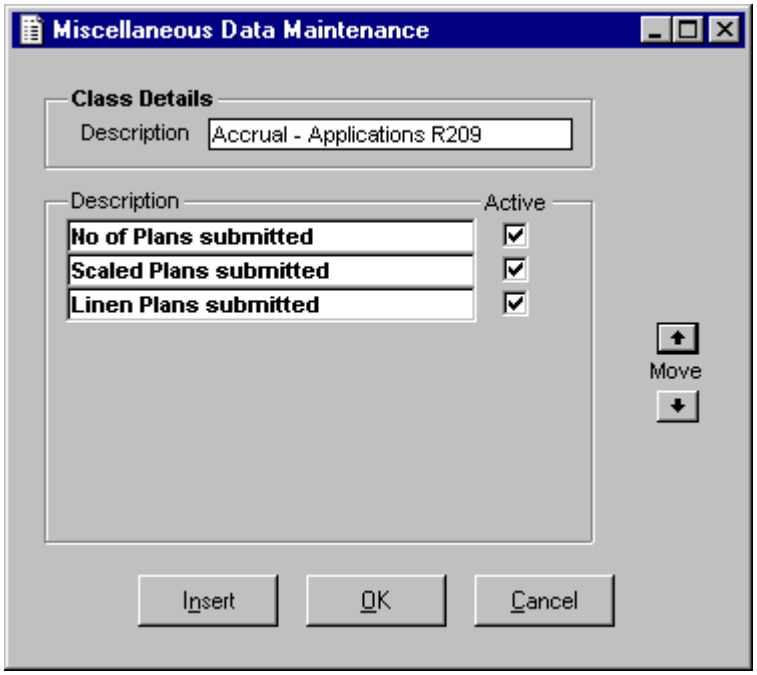
Active
If this box is checked on then the Extension Reason Code is available to the system.
If this box is checked off then the Extension Reason Code is no longer available to the system. Any existing applications with this Extension Reason Code will remain as entered. The Extension Reason Code will no longer be available for addition to applications.

Miscellaneous Data

This parameter allows an unlimited number of text fields to be defined to be used in Applications. This parameter may be used for items of data that are not specifically catered for within the Applications System. This parameter allows you to nominate free format text fields to be available to the Application 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 application 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 not 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 applications with this Miscellaneous Data type will remain as entered. The Miscellaneous Data type will no longer be available for addition to applications.

Move Up/Down
Pressing these buttons will move the Miscellaneous Data Type which 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 Application Maintenance.

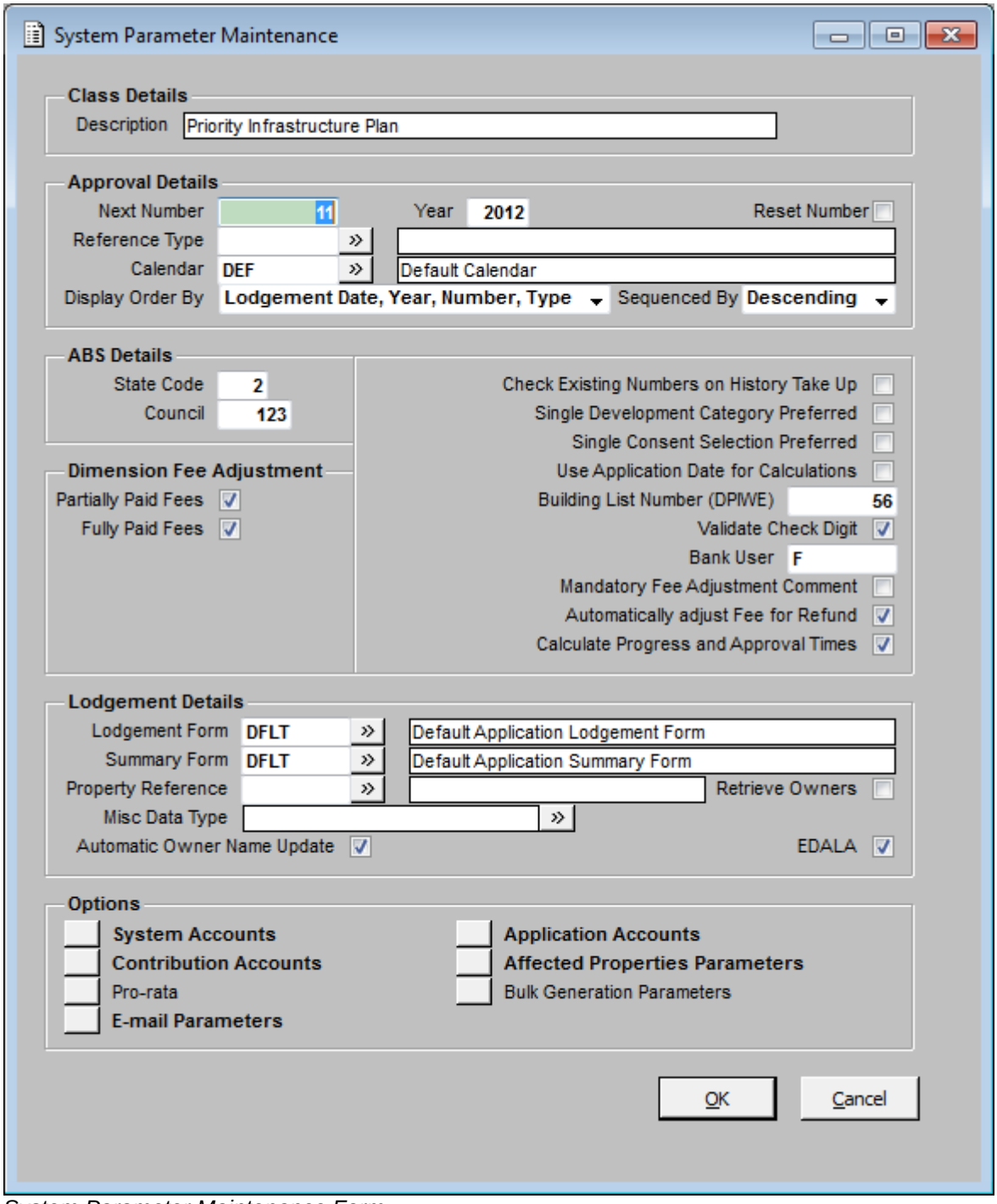
System Parameters

This parameter controls certain aspects of the system at its highest level. Settings assigned here affect the Application Class as a whole.
The options also enable the System Application Ledger Accounts to record financial transactions for Fee Receipting, Overpayments, Refunds and Contributions.

System Parameter Maintenance Form

This form is used to set system wide Class attributes.

NOTE: - The User Application Date for Calculations and the Bulk Generation Parameters Options are controlled by Authorised Functions and will only display if the appropriate Authorisation Codes are active.



System Parameter Maintenance Form

Class Details
This field contains the description of the Class of application 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 an application approval decision. This field is used in conjunction with the Year.

Approval Details - Year
This field contains the year that will be assigned for an application 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 application 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 an application with the given number.
The Reference Type nominated here will automatically be updated with the Approval Number when the application approval decision is entered.

Approval Details – Calendar

A different Calendar is able to be used for each Application Class if required. Where this field is left blank then the Default Calendar defined for Applications within the System Application Code Maintenance area will be used. By entering in a Calendar, all Dates in the Application Class will display and calculate their dates based on this Calendar.

Additionally if Workflow is being used within the Application Class then this Calendar is used for any date processing of Application 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 an Application. This default will then be displayed on the Application 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 Applications are displayed in Ascending or Descending Sequence. This default will then be displayed on the Application 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 content of this field is required for ABS returns.
The Council field contains the number assigned to your Council by the Australian Bureau of Statistics (ABS). The content of this field is required for ABS returns.

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.

Check Existing Numbers On History Take Up

This check box controls the checking of Existing Numbers when entering in Applications via the History Take Up Menu.

If this is set on, when Applications 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 Application 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 and Dimensions during Development Category Maintenance.

Single Consent Selection Preferred
If this flag is OFF then the Consent Maintenance form will use a multi-select/remove form. This is Smart Client functionality only. This allows the user to select multiple consents (or Referrals) and send multiple letters from the one form.

If this flag is ON then the Consent Maintenance form will use a single record maintenance form.

Use Application Date for Calculations
Checking on this field will result in the Application Date rather than the Lodgement Date being used for Progress Time Calculations on the Application Summary form and the Approval Times Report.

This function will be invoked when the Application Date is modified on the Application Data Maintenance form. The user will be prompted with the following message –
"Do you wish to adjust the Start Date of the first Started Task linked to this Application?"

Selecting "Yes" will force the system to check if the first Task linked to the Application has been started and if its Start Date is the same as the Application's Lodgement Date. If this is the case then the Start Date and Estimated Start Date of that first Task will be modified to the Application Date. This will then force the re-calculation of the Estimated Completion Date Time (Due Date) and the Estimated Start / Finish Times of any Tasks linked to that first one. If the first Task has been started and completed, only the Start Times will be modified, Completion Times will not be adjusted.

NOTE: - This function is an authorised function and therefore will not display if the authorisation is not active.

Building List Number (DPIWE)
The Building List Number is used to set the Next Building List Number that is to be used for the DPIWE Extract for Tasmania.

This Number is set globally for all Application Classes. Therefore the same number will be seen no matter which Application Class Parameters the User is looking at.

Validate Check Digit
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.

Bank User
The numeric Bank User Id is optional, but can be used in the check digit calculation, if no number is entered zero is used.

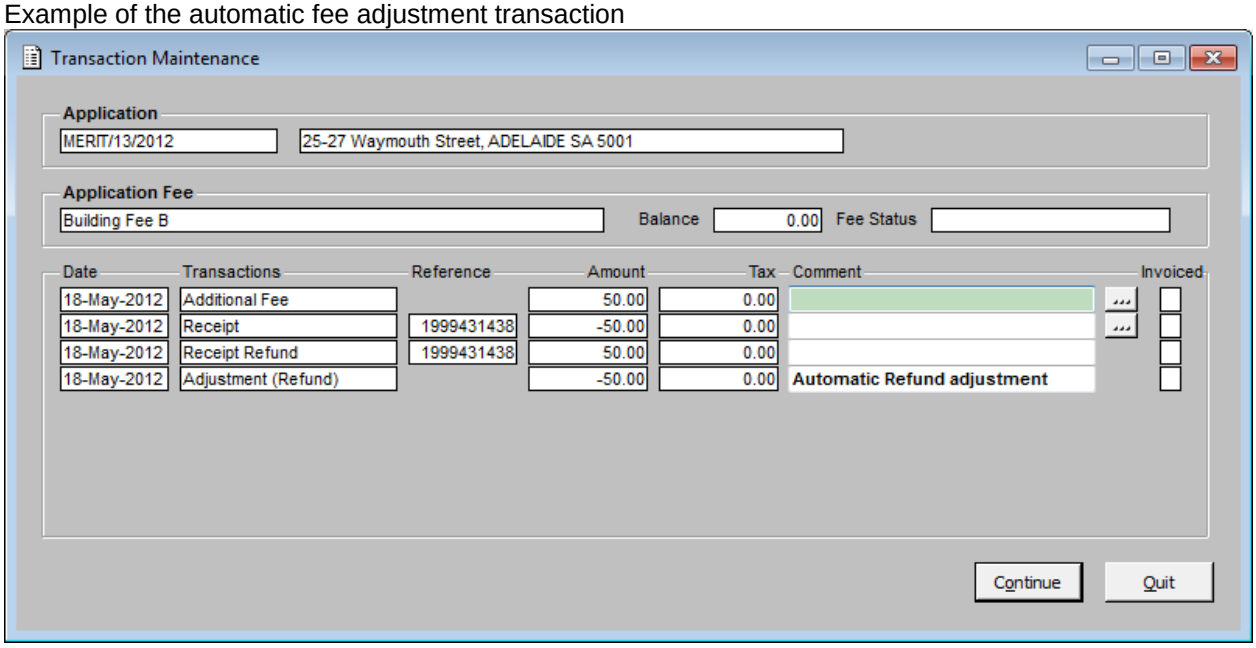
Mandatory Fee Adjustment Comment
If this checkbox is ON then the Comment on a Fee Adjustment is mandatory.

If this checkbox is OFF then the Comment on a Fee Adjustment is optional.

Automatically adjust Fee for Refund
If this checkbox is ON when an Application or Contribution Fee is Refunded an automatic Fee Transaction will be written to the value of the Refund Amount. This functionality means users do not need to adjust the fee amount.

If this checkbox is OFF then the Refund will only write a Receipt Refund leaving the full amount of the fee owing.

Example of the automatic fee adjustment transaction



Calculate Progress and Approval Times
This flag controls whether or not the “Progress and Approvals Times” on the Application Summary Form should be calculated.

If Processing Clocks are in use (Refer to Workflow Manual) then this calculation will not be required and the flag could be turned off.

Lodgement Details - Lodgement Form

This field contains the name of the form you wish to use for the lodgement process.

Lodgement Details - Summary Form

This field contains the name of the form you wish to use as the Application Summary.

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 Lodgement 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 Lodging an Application, 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.

Lodgement Details - 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 Application 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 Applications 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.

Miscellaneous Data Type
Miscellaneous data fields can be used to record an override to the area code in the service record or to record area code when no service linked to the application, New user action also required to maintain this using workflow.

EDALA
If EDALA interfacing is to occur for this Application Class then this parameter needs to be set ON. Setting this flag ON will enable additional details to be defined for Decisions, enable the importing and exporting of EDALA Applications and updating of EDALA information.

Options - System Accounts
Selecting this button presents the System Accounts Maintenance Form.

Options - Application Accounts
Selecting this button presents the Application Accounts Maintenance Form.

Options - Contribution Accounts
Selecting this button presents the Contribution Accounts Maintenance Form.

Options - Pro rata
Selecting this button presents the Pro-Rata Maintenance Form.

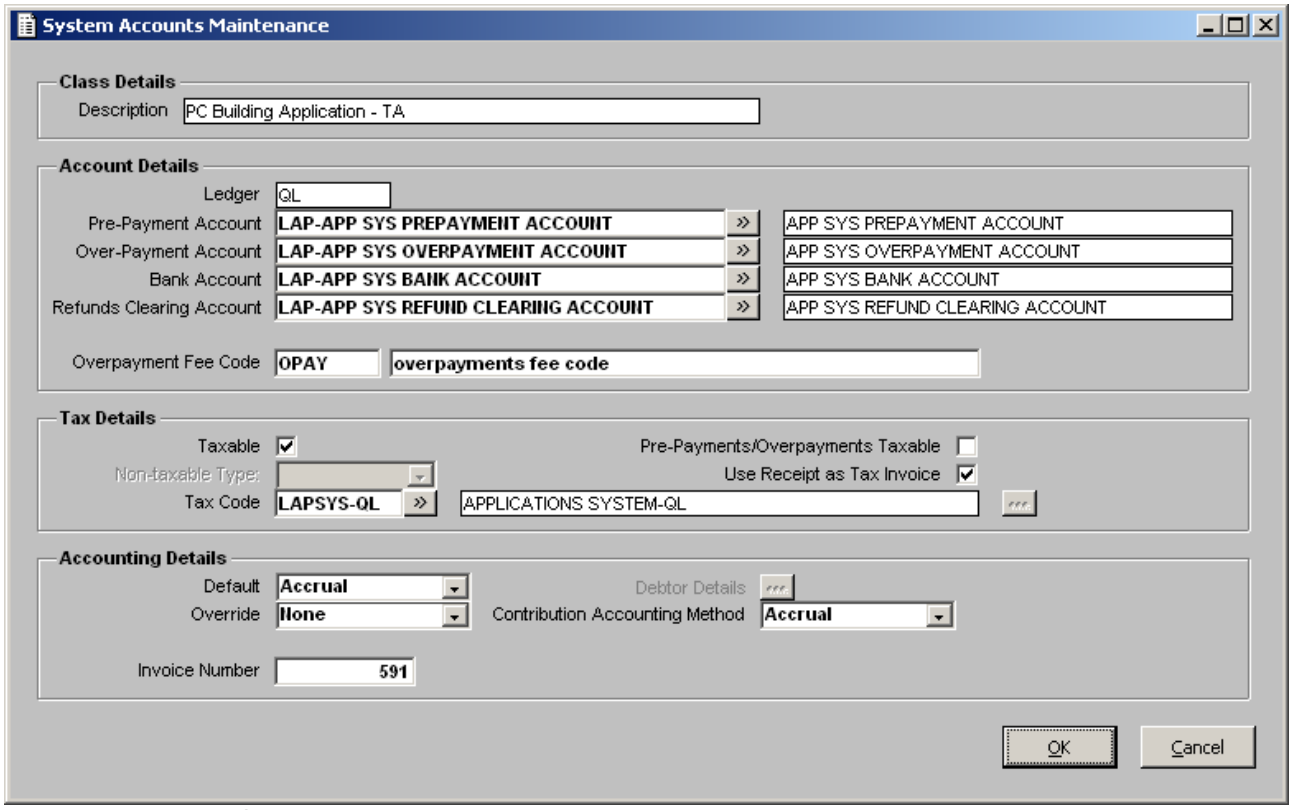
Options – Affected Properties Parameter
Selecting this option will display the Parameter settings for Affect Properties allowing the setting of default information for this process if required.

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 Application 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.



System Account Maintenance Form

Class Details

This field contains the description of the Class of application to which you are assigning General Ledger Accounts.
This field is display only and may not be maintained.

Account Details - Ledger Code

This field contains the ledger code to which all financial transactions will be posted. Only one ledger code per application class may be used.

Account Details - System Accounts

Pre-Payment Account

This field contains the ledger account to which all prepaid 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.

Over-Payment Account

This field contains the ledger account to which all over-payment 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.

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.

Refunds Clearing Account

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.

Account Details - Overpayment Fee Code

These fields contain the Overpayment Fee Code and Description.

Tax Details - Taxable

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

Tax Details – Prepayments / Overpayments Taxable

If this field is checked On then when Prepayments or Overpayments are generated they will generate Tax records and be defined as being Taxable. If this field is checked Off then when Prepayments or Overpayments are generated no Tax records / accounting records will be generated.

Tax Details - Use Receipt as Tax invoice

If this checkbox is checked on, the printed receipt will display additional information for all fees that have had money allocated to them.
The extra fee information included is:

- Fee Type Description
- Fee Transaction Amount
- Fee Tax Transaction Amount

If this check box is checked off, the above Fee details will no longer be displayed on the receipt.

Tax Details – Non-taxable Type

The Non-taxable Type field is only available for selection when the Taxable field is flagged Off. That is that no Tax is to be generated for the whole Application Class. 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 Details - 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 Details - Tax Code Detail Button

Selecting the Tax Code Detail Button displays the Tax Code Maintenance Form.

Accounting Details - Default

The Default Accounting Method is a Mandatory field. The Default is used as the default for each Application record, however the Override Accounting Method (if defined) will allow an override to this value on any Application.

The Default Options available are :-

- Accrual
- Cash
- Pathway Debtors

Where the Default is set to Pathway Debtors then the financial transactions for the Applications will be generated and passed into the Pathway Debtors Module for processing of payments.

NOTE:- When the Account Method for an Application has been set to Pathway Debtors then it is necessary for any Receipts to be raised against the Debtor Invoice and not against the Application. These Receipts will need to be created as DAP or DR type Receipts with the Payment Reference being nominated in the Qualifier field. It will not be possible to receipt directly to the Application.

Accounting Details – Debtor Details

When the Accounting Method has been defined using Pathway Debtors then the Debtor Details Button is displayed for additional information to be entered to assist with the interfacing of transactions from Applications 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 Application record.

The Override Options available are :-

- None
- Accrual
- Cash
- Pathway 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 an Application has been set to Pathway Debtors then it is necessary for any Receipts to be raised against the Debtor Invoice and not against the Application. These Receipts will need to be created as DAP or DR type Receipts with the Payment Reference being nominated in the Qualifier field. It will not be possible to receipt directly to the Application.

Accounting Details – Contribution Accounting Method

The Contribution Accounting Method defaults to the value of the Default Value field if there is no override available. It can only be set to whatever the Default or Override has been defined at.

The Options available (depending on the settings in the Default and Override fields) are :-

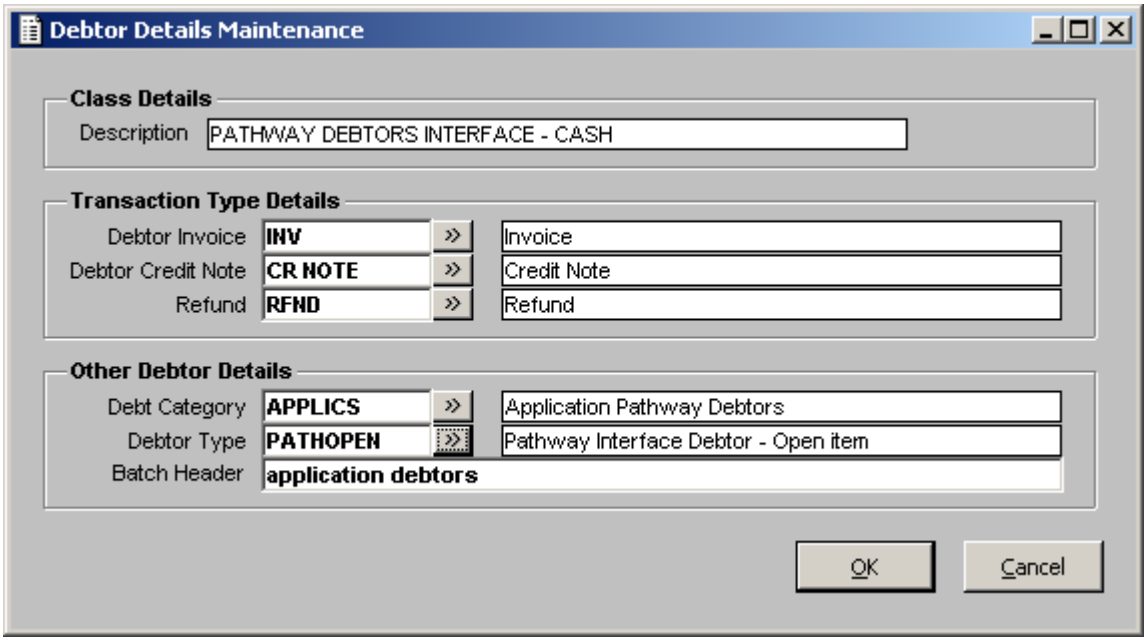
- Accrual
- Cash
- Pathway Debtors

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

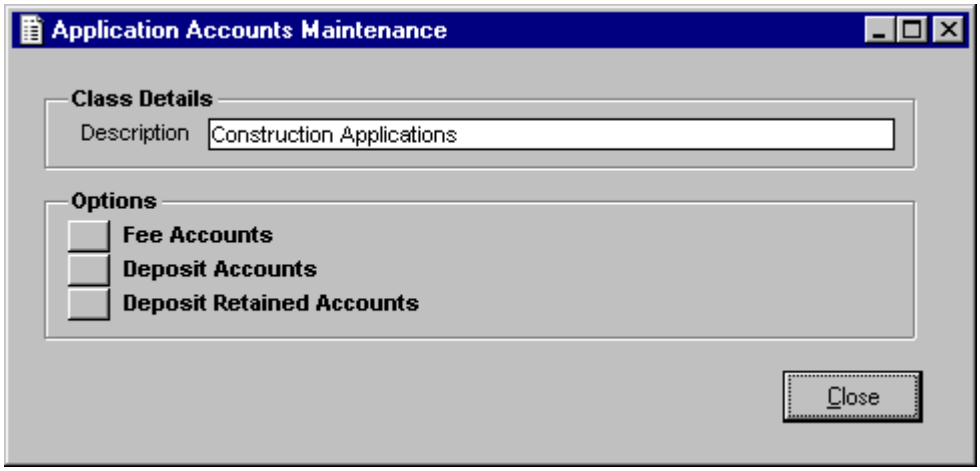
The Debt Category to be used for the Debtor Details is defined in this field. If the Debt Category Code is not known then the Pop Up can be selected to display a list of valid Debt Categories.

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 Applications.

Application Accounts Maintenance Form



Application Accounts Maintenance Form

Class Details - Description
This field contains the description of the Class selected.

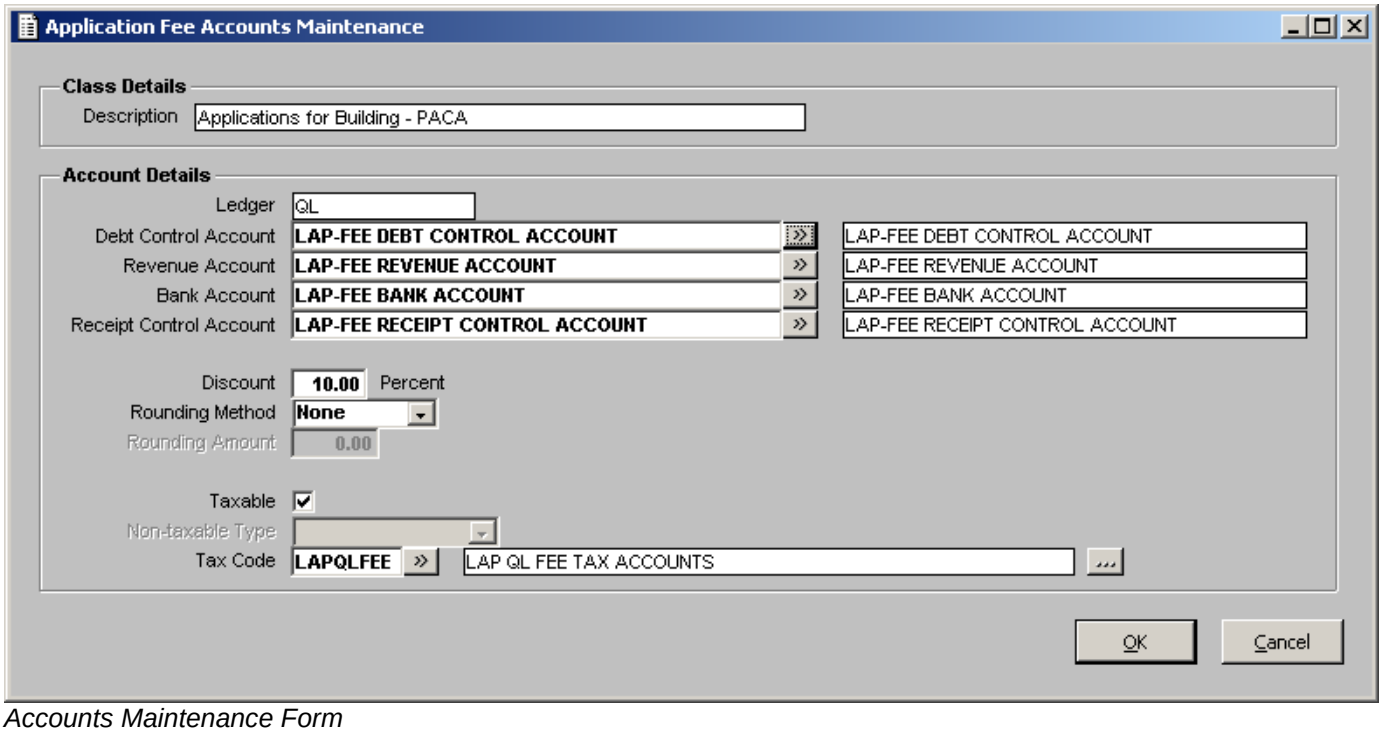
Options – Fee Accounts
Selecting the Fee Accounts Button displays the Application Accounts Maintenance Form.

Options – Deposit Accounts
Selecting the Deposit Accounts Button displays the Deposit Accounts Maintenance Form.

Options – Deposit Retained Accounts
Selecting the Deposit Retained Accounts Button displays the Deposit Retained Accounts Maintenance Form.

Accounts Maintenance Form

This form defines the Application General Ledger Accounts for the Application 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.



Accounts Maintenance Form

Class Details
This field contains the description of the Class of application to which you are assigning Application 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 application class may be used.

Bank Accounts

Debt Control Account
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.
Revenue Account
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.
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.
Receipt Control Account
This field contains the ledger account to which all Receipt 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.

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 Round 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

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 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 Application 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 an Application 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.

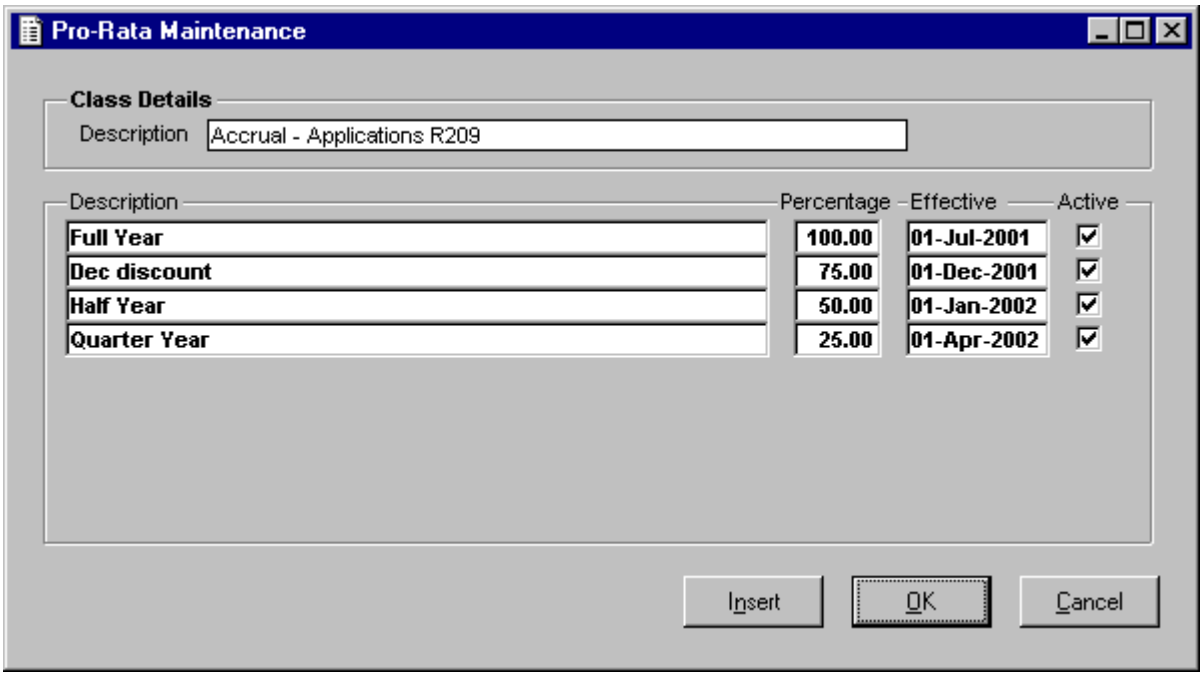
Users should sign off their Pathway Sessions and sign back onto Pathway to make sure that the changed Parameters are used.

Tax Code Detail Button

Selecting the Tax Code Detail Button displays the Tax Code Maintenance Form.

Pro-Rata Maintenance Form

This form enable Users to specify when specific pro-rata percentages are to apply against pro-rata fees.



Pro-Rata Maintenance Form

Class Details – Description

This field contains the description of the Class of application to which you are assigning Pro-Rata Percentages.

Description

This field contains the description of the Pro-Rata Percentage.

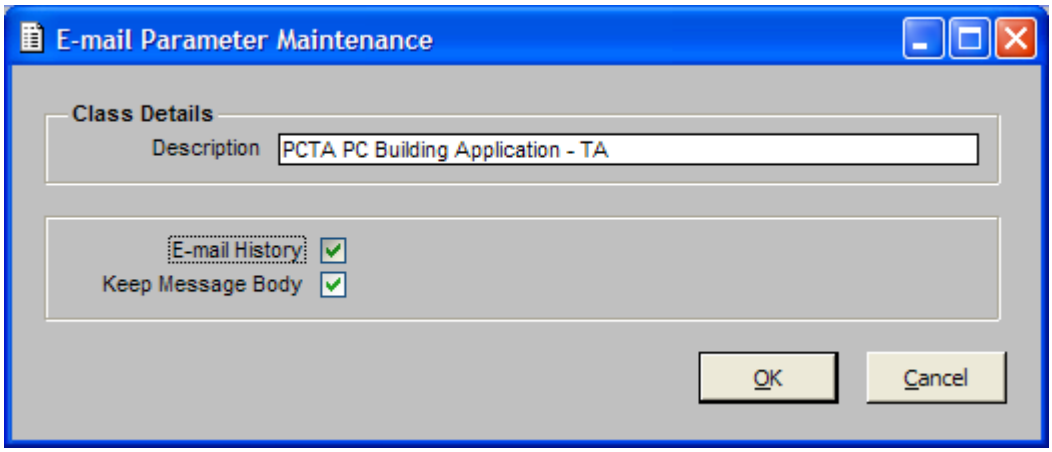
Percentage
This field contains the value of the Pro-Rata Percentage.

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.

E-mail History Form

This form enables Council to keep a history of all emails sent that which are linked to the application. Once the parameters have been selected any email that has been created as part of a workflow task linked to the application will be able to be viewed.



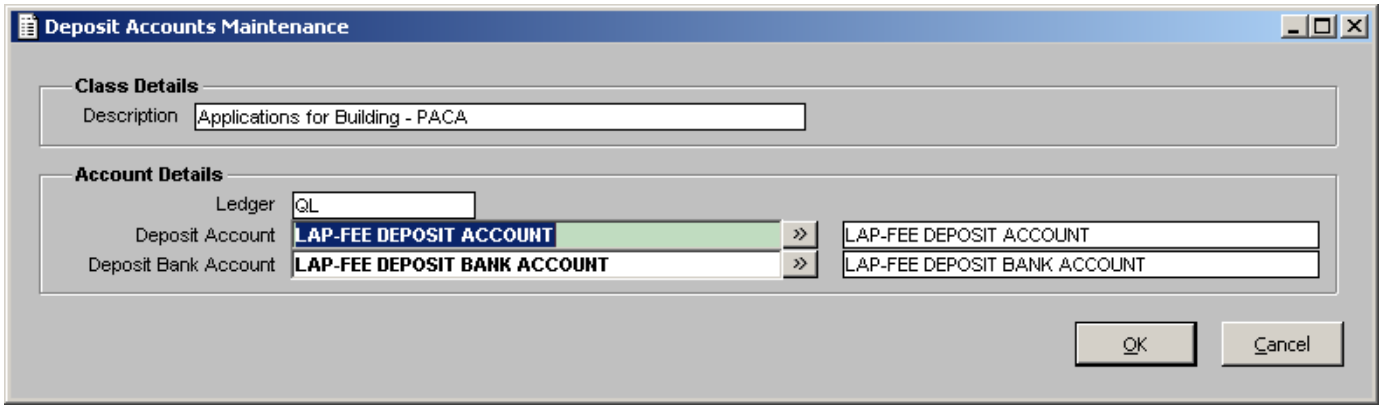
E-mail Parameter Form

E-mail History
By ticking on the E-mail History button a list of emails generated via workflow will be able to be viewed.

Keep Message Body
By selecting this option the body of the email will also be able to be viewed.

Deposit Accounts Maintenance Form

This form defines the Deposit Ledger Accounts for the Application 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 Application 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 application class may be used.

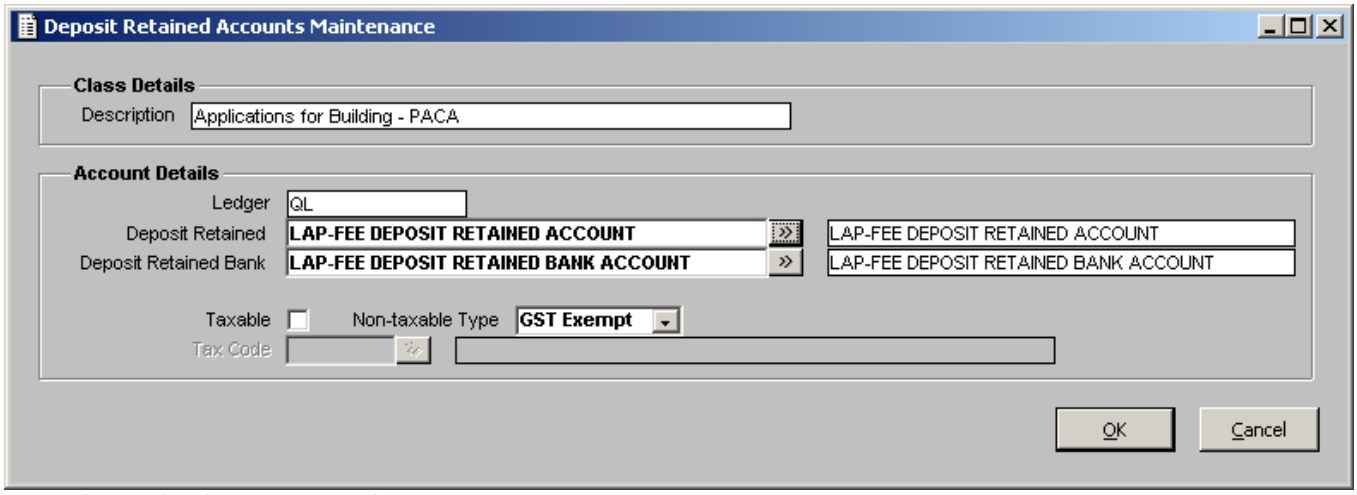
Account Details

Deposit Account
This field contains the ledger account to which all Deposit 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 Bank Account
This field contains the ledger account to which all Deposit 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 Application 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 application to which you are assigning Application 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 application class may be used.

Account Details

Deposit Retained Account
This field contains the ledger account to which all Deposit Retained 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 Deposit Retained 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.

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.

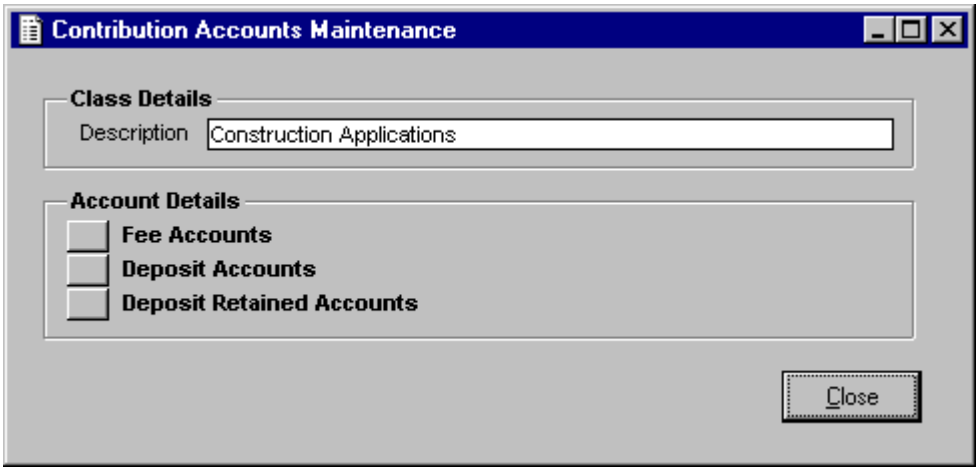
It is expected that Australian sites will use GST Free and Division 81 only. Financial systems can use these values, as the applicable codes, below, are output in the Pathway Financial Transaction File in place of the previous 'N' value.

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

Tax 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 Detail Button
Selecting the Tax Code Detail Button displays the Tax Code Maintenance Form.

Contribution Accounts Maintenance Form



Contribution Accounts Maintenance Form

Class Details – Description
This field displays the Class Description.
This field is display only and may not be maintained.

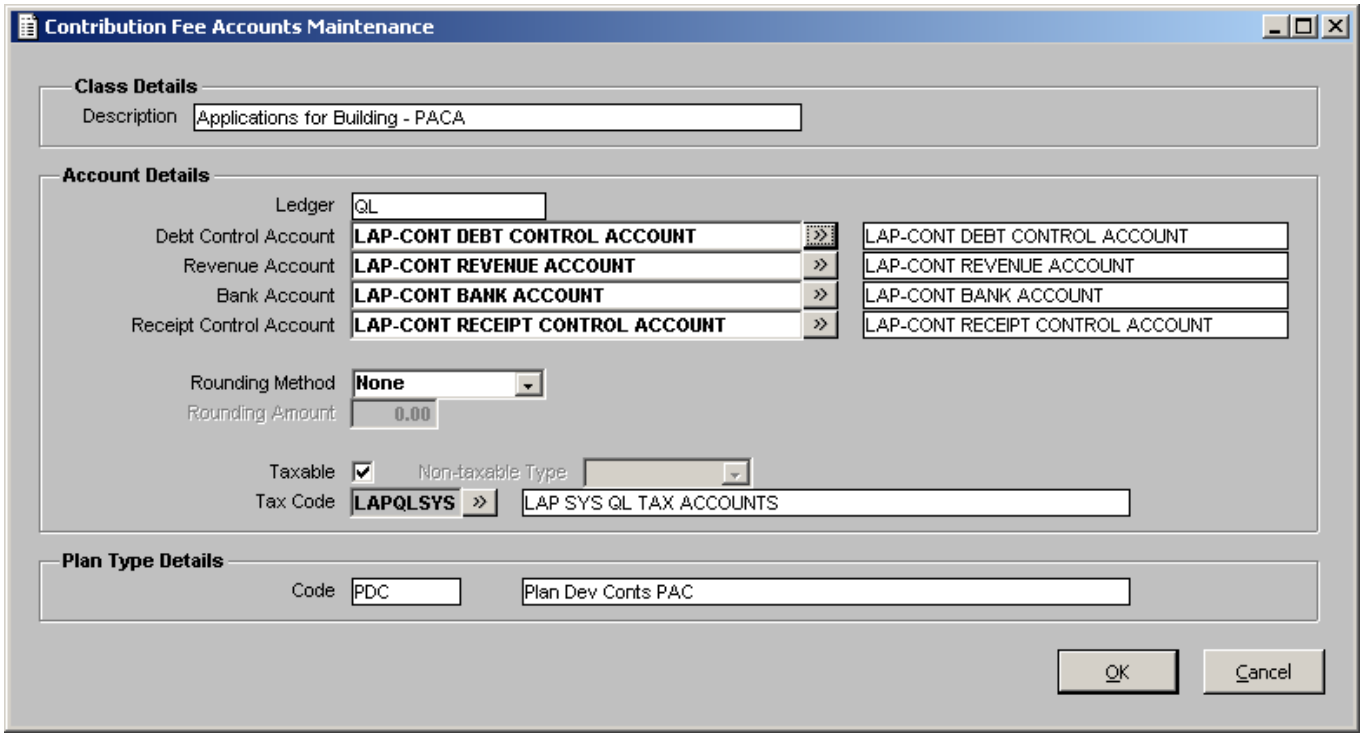
Account Details – Fee Accounts
Selecting the Fee Accounts Button displays the Contribution Accounts Maintenance Form.

Account Details - Deposit Accounts
Selecting the Deposit Accounts Button displays the Contributions Deposit Accounts Maintenance Form.

Account Details – Deposit Retained Accounts
Selecting the Deposit Retained Accounts Button displays the Contributions Deposit Retained Accounts Maintenance Form.

Contribution Accounts Maintenance Form

This form defines the Contribution Ledger Accounts for the Application 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.



Contribution Accounts Maintenance Form

Class Details - Description
This field contains the description of the Class of application to which you are assigning Contribution Accounts.

Ledger
This field contains the ledger code to which all financial transactions will be posted. Only one ledger code per application class may be used.

Accounts

Debt Control Account
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.

Revenue Account
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.

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.

Receipt Control Account
This field contains the ledger account to which all Receipt 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.

Rounding Method
The Round Method allows the User to select from the options of Up, Down, None or Closest. The Drop down box can be selected 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

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 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 Detail Button

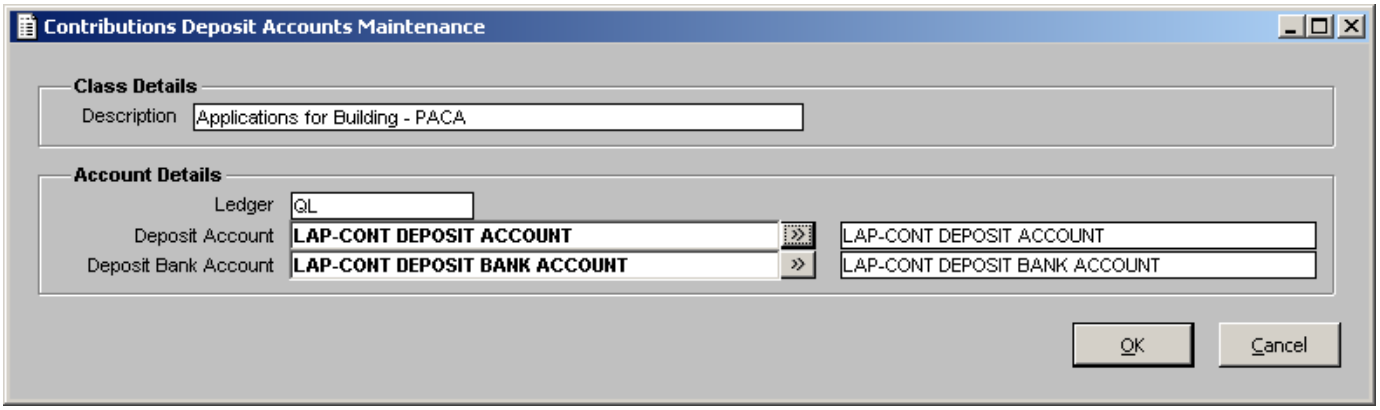
Selecting the Tax Code Detail Button displays the Tax Code Maintenance Form.

Plan Type Details - Code

This field contains the Plan Type created in Property Plan Type Parameters to be recognised as a Contribution Plan. The Plan Type must be recorded in Applications System Parameters.
Enter a valid code or select from the Plan Type Pop Up Form

Contributions Deposit Accounts Maintenance Form

This form defines the Deposit Ledger Accounts for the Application 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.



Contributions Deposit Accounts Maintenance Form

Class Details – Description

This field contains the description of the Class of application to which you are assigning Application 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 application class may be used.

Account Details

Deposit Account

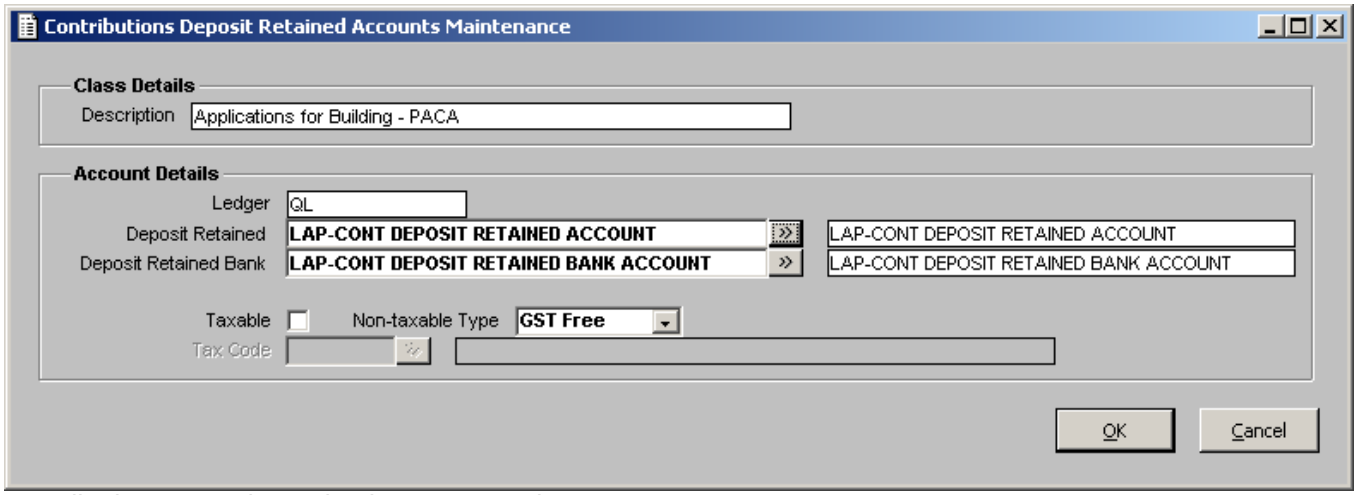
This field contains the ledger account to which all Contribution Deposit transactions will be posted. The Field consists of 3 parts, an Account Number, Pop Up Button and the Account Description. The Pop Button for this and other Accounts listed below detail out to the Financial Account Pop Up Form for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

Deposit 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.

Contributions Deposit Retained Accounts Maintenance Form

This form defines the Deposit Retained Ledger Accounts for the Application 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.



Contributions Deposit Retained Accounts Maintenance Form

Class Details – Description

This field contains the description of the Class of application to which you are assigning Application 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 application class may be used.

Account Details

Deposit Retained Account

This field contains the ledger account to which all Contribution Deposit 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.

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.

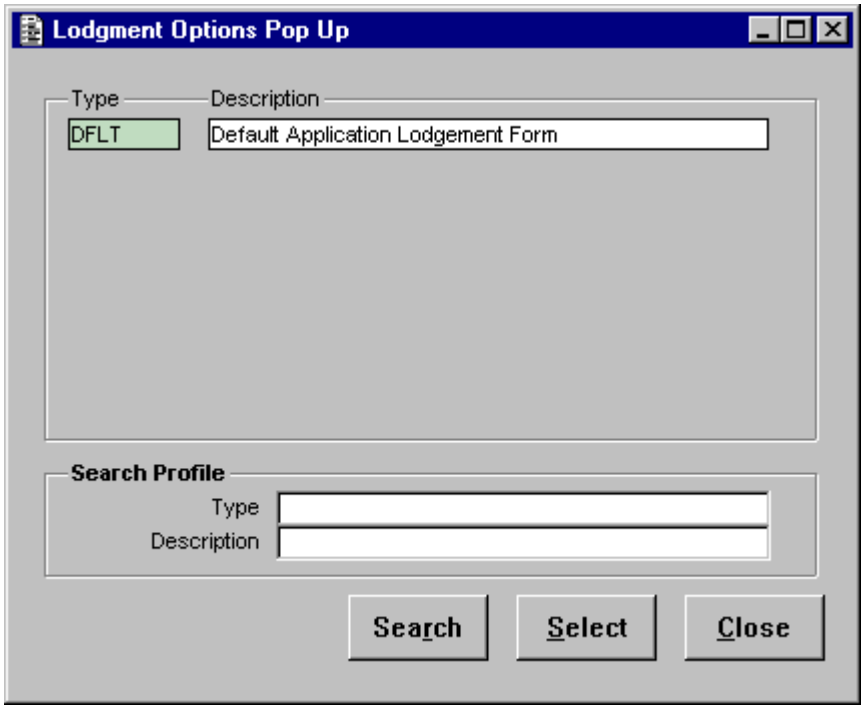
- N - GST Free
- X - GST Exempt
- 8 - Division 8
- I – Input Tax
- O – Out of Scope
- E – Export Sales
- Z - Undefined

Tax 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 Detail Button
Selecting the Tax Code Detail Button displays the Tax Code Maintenance Form.

Lodgement Options Pop Up Form

This form allows for the selection of individual Lodgement Options.



Lodgement Options Pop Up Form

Type
This field displays the Code given to each Lodgement Option.

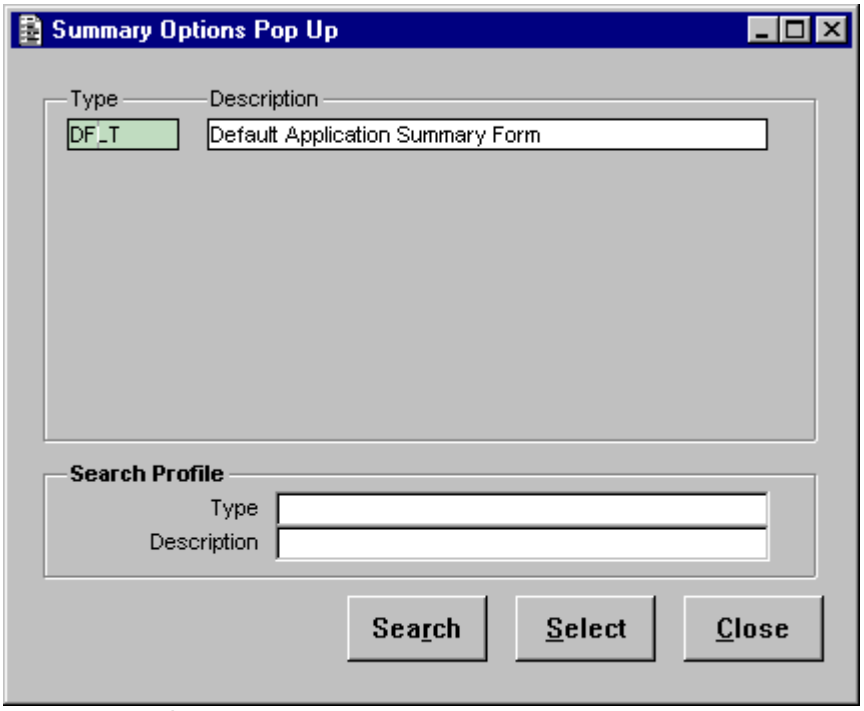
Description
This field is a detailed Description of the Lodgement Option

Search Profile - Type
Enter Type (or part thereof) on which to base your search.

Search Profile - Description
Enter a Description (or part thereof) on which to base your search.

Summary Options Pop Up Form

This form allows for the selection of individual Summary Options.



Summary Options Pop Up Form

Type
This field displays the Code given to each Summary Option.

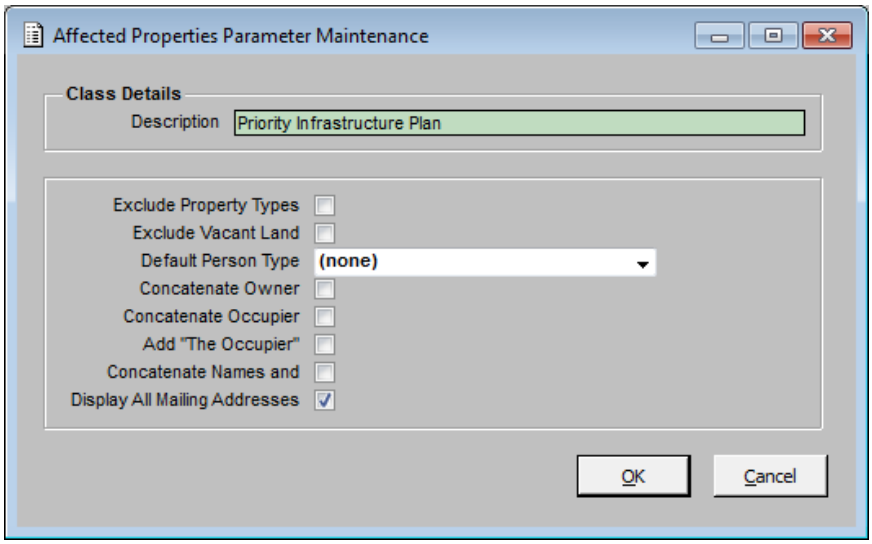
Description
This field is a detailed Description of the Summary Option

Search Profile - Type
Enter Type (or part thereof) on which to base your search.

Search Profile - Description
Enter a Description (or part thereof) on which to base your search.

Affected Properties Parameter Maintenance Form

The Affected Properties Parameter Maintenance form allows the enter 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 Application 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.

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 an Application. The selected Person Type will be automatically applied to any new Properties linked to the Application of this Class. 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.

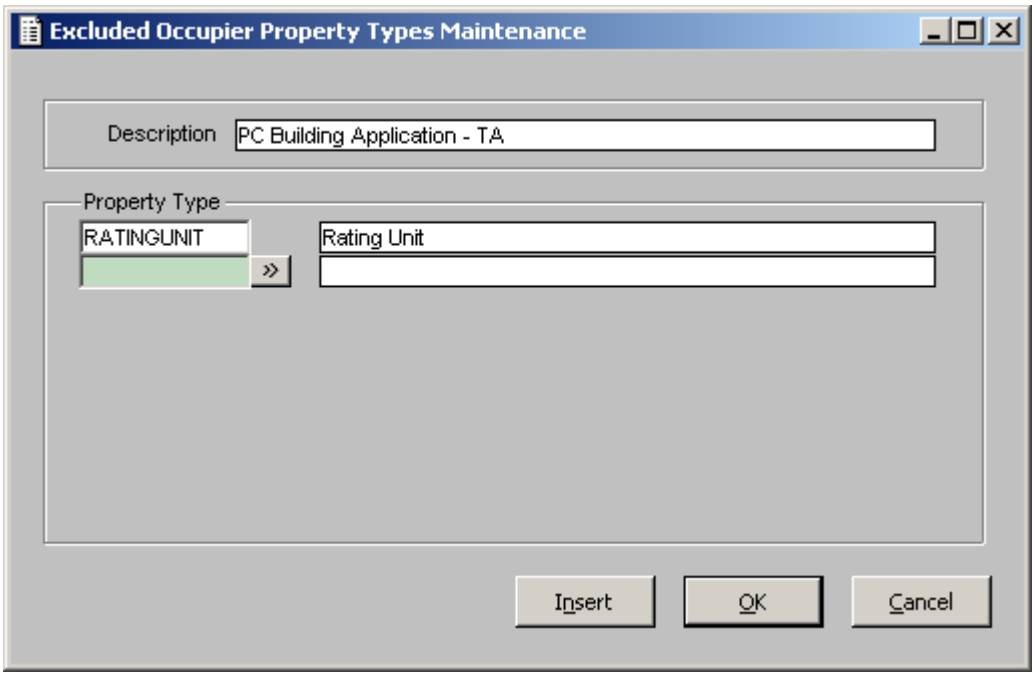
Concatenate Names
Setting the Concatenate Names flag will default this value onto the Affected Property Select form for new Affected Properties. Note the Affected Property Selection form will only display if the Default Person Type has been set to None or no Affected Properties Parameters have been defined.

Note that this option is only available if the Secured Function is set to allow the Concatenation of same Names.

Display all mailing addresses
Setting this flag on will display the Mailing Addresses for the Affected Properties records.

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.



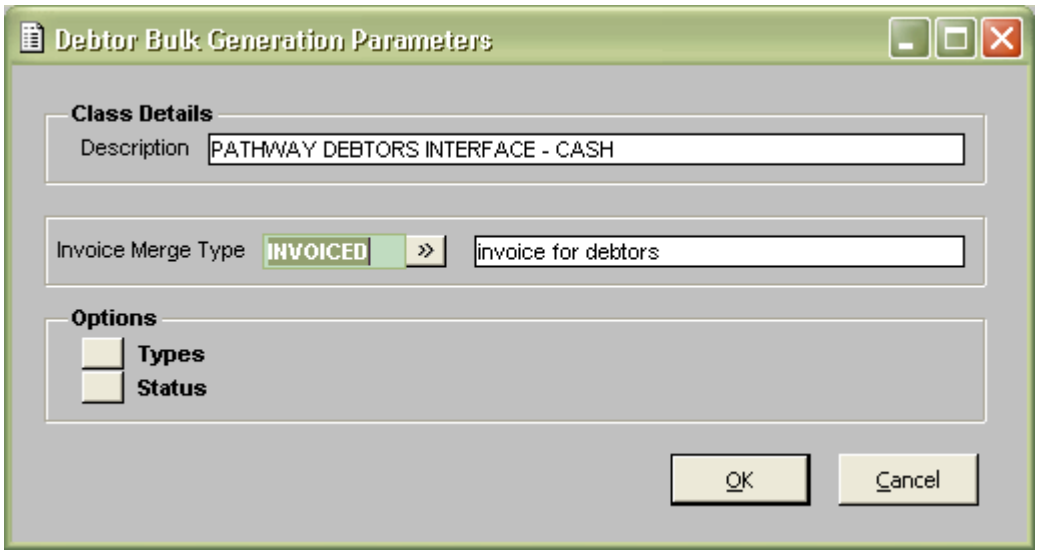
Excluded Occupier Property Types Maintenance Form

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 Application 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 Application 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 Application 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

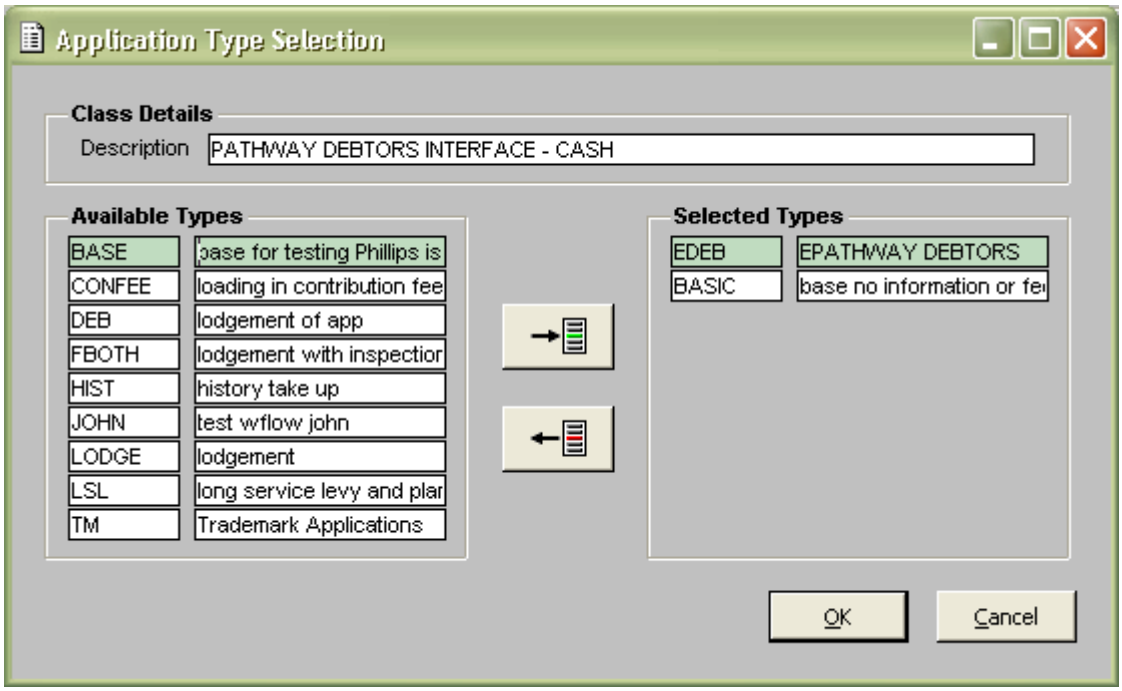
Selecting the Types Option will display the Application Type Selection form where the user is able to nominate the Application Types that are able to be processed via the Debtor Bulk Generation function.

Options - Status

Selecting the Status Option will display the Application Status Selection form where the user is able to nominate the Statuses that are able to be processed via the Debtor Bulk Generation function.

Application Type Selection Form

This form allows the selection of the Application Types that can be used within the Debtor Bulk Generation process. Only those Application Types selected will be included in the Bulk process.



Application Type Selection Form

Class Details - Description

This field contains the description of the Class of Application to which you are selecting Application Types.
This field is display only and may not be maintained.

Available Types

The Application Types for the Class are displayed in the Available Types area. Highlight the required Application Type and use Move Option to move the required Application Type to the Selected Types List. Once an Application Type has been moved to the Selected Types list is not displayed in the Available Types list.

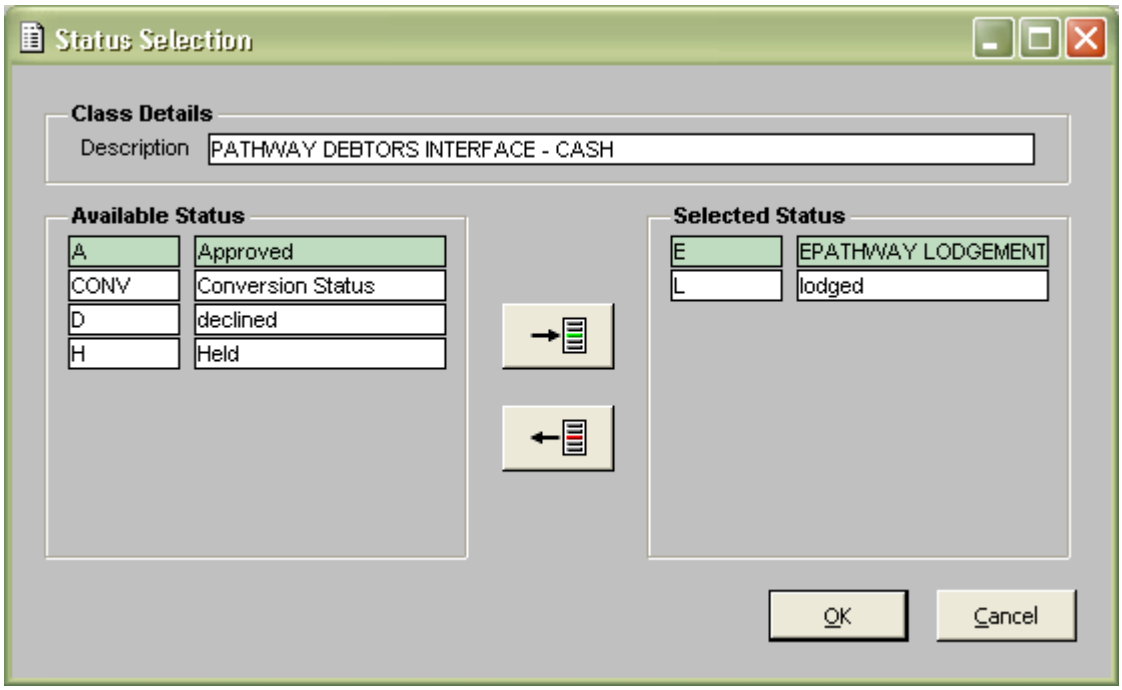
Selected Types

The Application Types that have been selected for the Bulk Generation process are displayed in this list. If an Application Type is required to be removed from the list then highlight the required Application Type and

use Move Option to move the Application Type to the Available Types List. Once an Application Type has been moved to the Available Types list is not displayed in the Selected Types list.

Application Status Selection Form

This form allows the selection of the Application Statuses that can be used within the Debtor Bulk Generation process. Only those Application Statuses selected will be included in the Bulk process.



Status Selection Form

Class Details - Description

This field contains the description of the Class of Application to which you are selecting Application Statuses. This field is display only and may not be maintained.

Available Status

The Application Status for the Class are displayed in the Available Status area. Highlight the required Application Status and use Move Option to move the required Application Status to the Selected Status List. Once an Application Status has been moved to the Selected Status list is not displayed in the Available Status list.

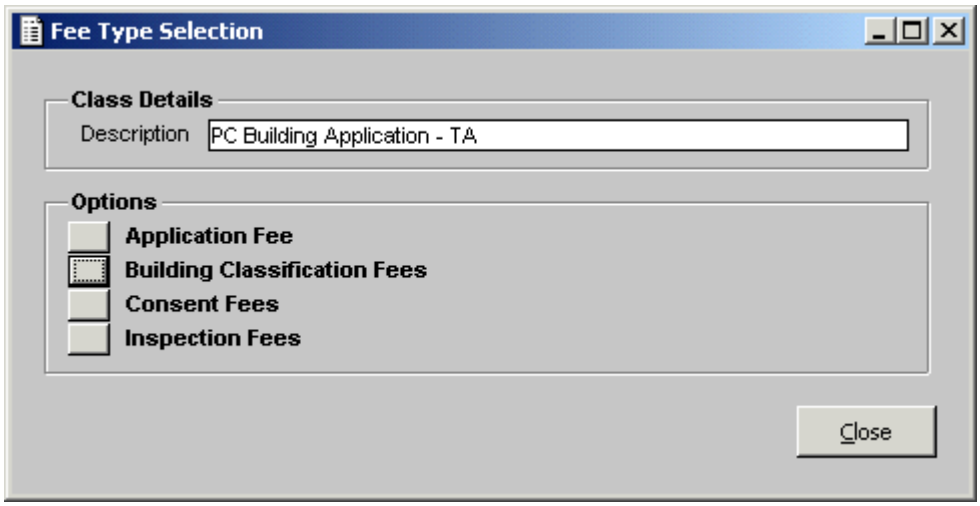
Selected Status

The Application Status that have been selected for the Bulk Generation process are displayed in this list. If an Application Status is required to be removed from the list then highlight the required Application Status and use Move Option to move the Application Status to the Available Status List. Once an Application Status has been moved to the Available Status list is not displayed in the Selected Status list.

Application Fee

Application Fee Parameters are design to allow the pre-entry of all fees that may be used when processing Applications.
This parameter allows for the establishment of Fee Codes, descriptions, base fees and their calculation methods.
Alpha or numeric codes can be used to identify the types of Fee Code applicable to the application. The basis of calculation (the Dimension Code/s) for that fee should be entered against the Fee Code, ie. Area of Building Work or Estimated Cost of Work etc.
If using Area or dollar value as a basis, then a range of values can be entered with separate fees and increments for each of these ranges.
If the requirement is to manually calculate the fees, the value table may be left blank and the code and fee entered manually.
Ledger Accounts will be required to handle all accounting entries associated with the fee revenue. The Ledger Accounts are established within the System Parameter option however may be overridden for individual fee types.
These Fee Codes may then be added to the Application Types so that they are automatically loaded against each Application lodged.
If Consents and Inspections have not been assigned for the Application Class then these Fee Options will not be available for entry.

Application Fee Maintenance Form



Application Fee Maintenance 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 – Application Fees
Selecting the Application Fees Button displays the Application 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 Application Class then this option cannot be selected or maintained.

Options – Building Classification Fees
Selecting the Building Classification Fees Button displays the Building Classification Fee Maintenance Form.

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

Application Fees / Building Classification / Consents / Inspection Application Fees Maintenance Form

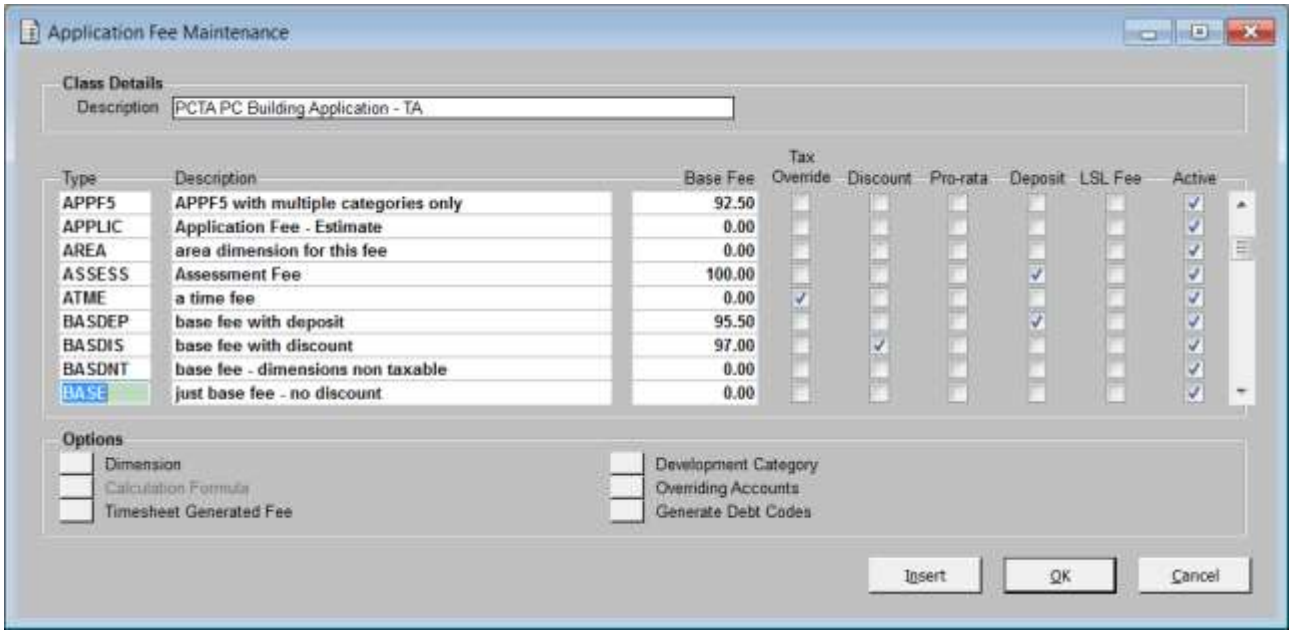
For a Fee flagged as pro-rata and discounted, the following steps are used to calculate the final Fee Amount:
1. Calculate Fee (using dimensions etc)
2. Apply Discount percentage
3. Apply Pro-rata percentage

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 Application 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 Applications.

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



Application Fee Maintenance Form

Pathway Debtor Accounting Method
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 to '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. This field is display only and may not be maintained.

Type
This field contains Application Fee Type code. Up to six alphanumeric characters may be entered.

Description
This field is a detailed Description of the Application Fee Type.

Base Fee
This field may display the dollar value that can be attached to an Application 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.

Tax Override
Setting this flag ON for the particular application fee will ensure the tax charged will be based on the date of the fee raised rather than using the taxation rate based on the supply date.

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.

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 Application 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.

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.

NOTE :- 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 Application Fee is to be used as a Deposit Fee.

Active
This field if checked on will allow this Application Fee to be selected when assigning Fees to an Application. If this field is not checked on, then this Application Fee is not available for selection.

Options

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

Dimension
Dimensions may be entered against a particular Fee. The Creation and Modification of Dimensions is detailed in a separate area.

Development Category
This function allows the User to set up specific categories by Development. This then allows each Application to be categorised. Each Category can have different base fees and dimensions linked to them.

Calculation Formula
Selecting the Calculation Formula Option Button displays the Maintenance Form to allow Calculations to be entered for the Dimension Information that has been defined for the Fee.

Overriding Accounts
Selecting the Overriding Accounts Option Button displays the Overriding Fee Accounts Maintenance 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 a Minimum Fee amount.

Generate Debt Codes
Selecting the Generate Debt Codes Option Button will update the Debtors Debt Types with Fees from this option. This is only applicable if the Pathway Debtors Module has been nominated as an Accounting Method within the System Parameters for the Application Class.

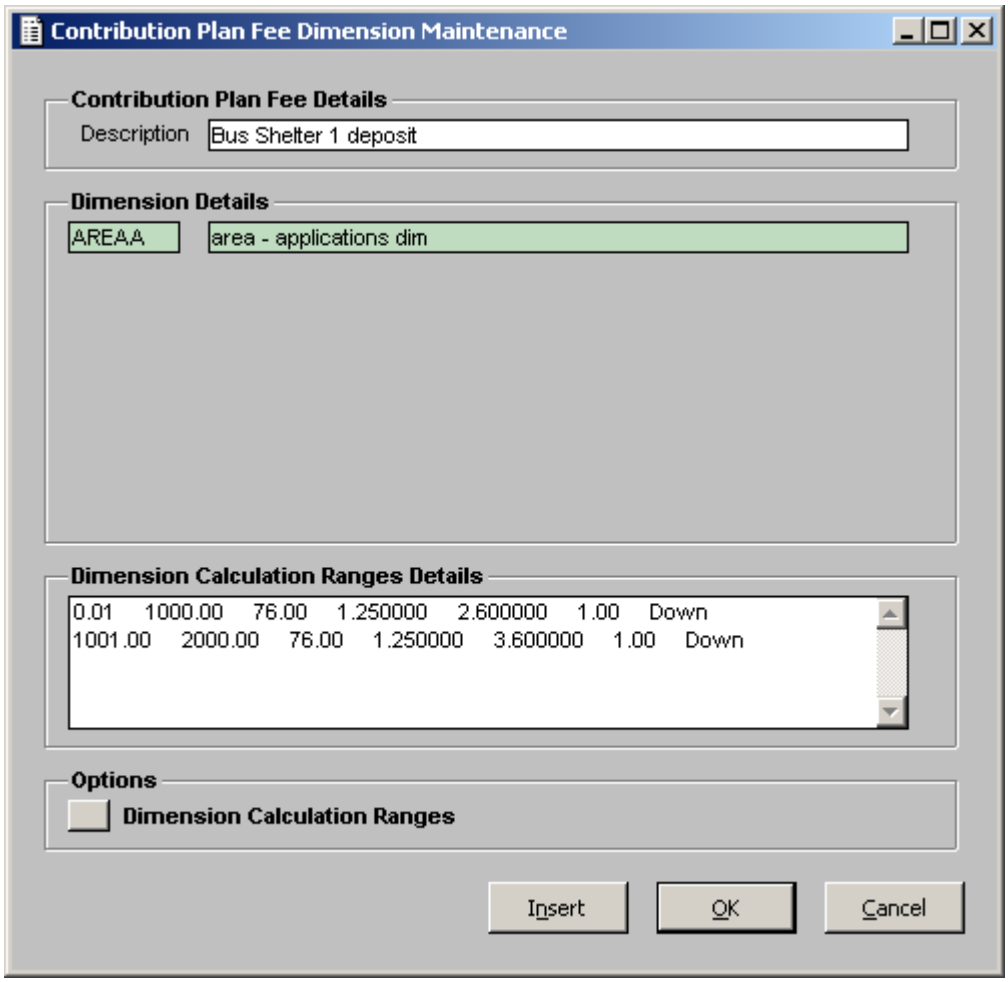
Fee Dimension Maintenance Form

This form is specific to each Application 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.

Multiple Dimensions can be included in the calculation of the Dimensions.



Fee Dimension Maintenance Form

Application Fee Details - Description

This field describes the actual Application 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 Application 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.

Dimension Calculation Ranges Details

Once Dimension Ranges have been defined then they are displayed in this field for the appropriate Dimension that currently has focus. As focus is moved from one Dimension to the next so the information displayed in this field will change to reflect the next Dimension's ranges.

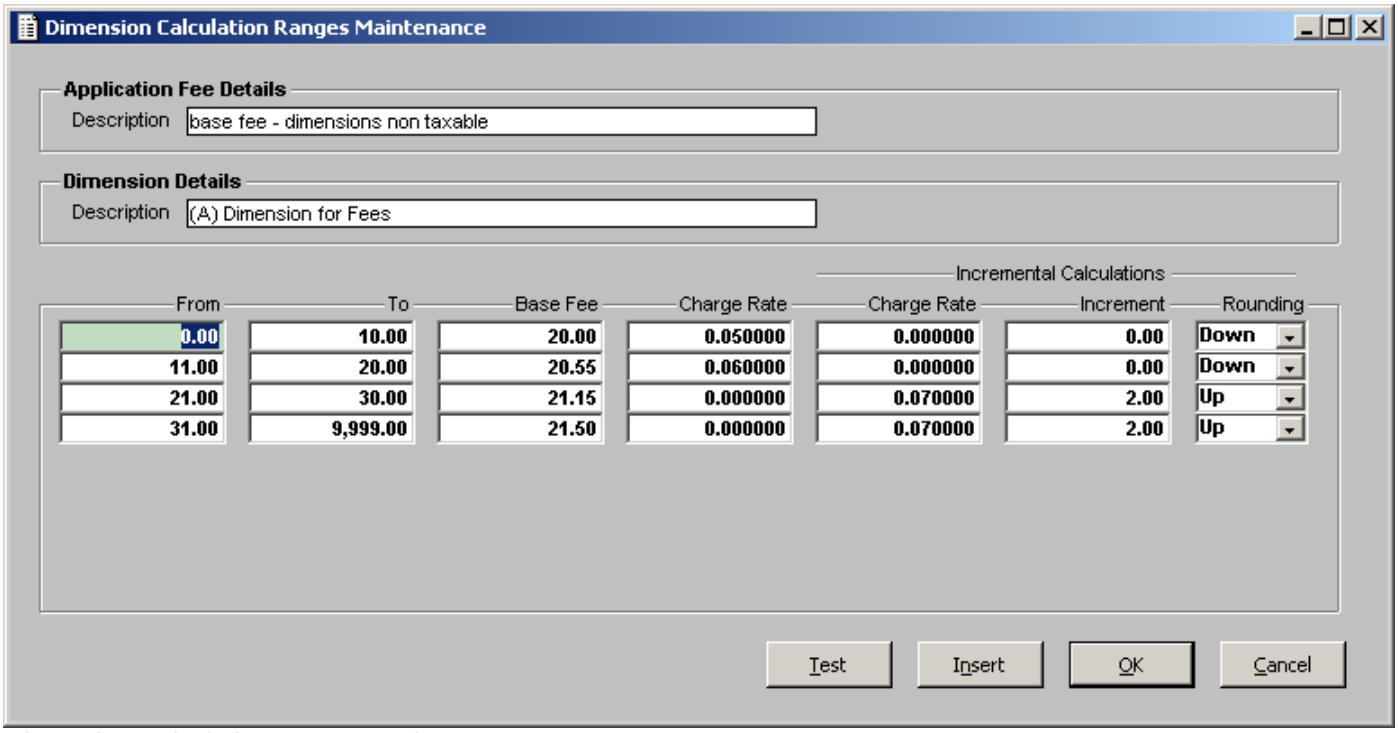
Options - Dimension Calculation Ranges

Selecting this Option will display the Dimension Calculation Ranges Maintenance form to allow the defining of the ranges and fees for the Dimension currently selected.

Dimension Calculation Ranges Maintenance Form

This form is specific to each Application 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 Form
Example using the data in the above form

Application 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 from the dimension
  - A standard charge rate for each amount within a range
  - An incremental 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

Application Fee Details - Description
This field describes the actual Application 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 Application 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 Caclulations 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 Calculation 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.

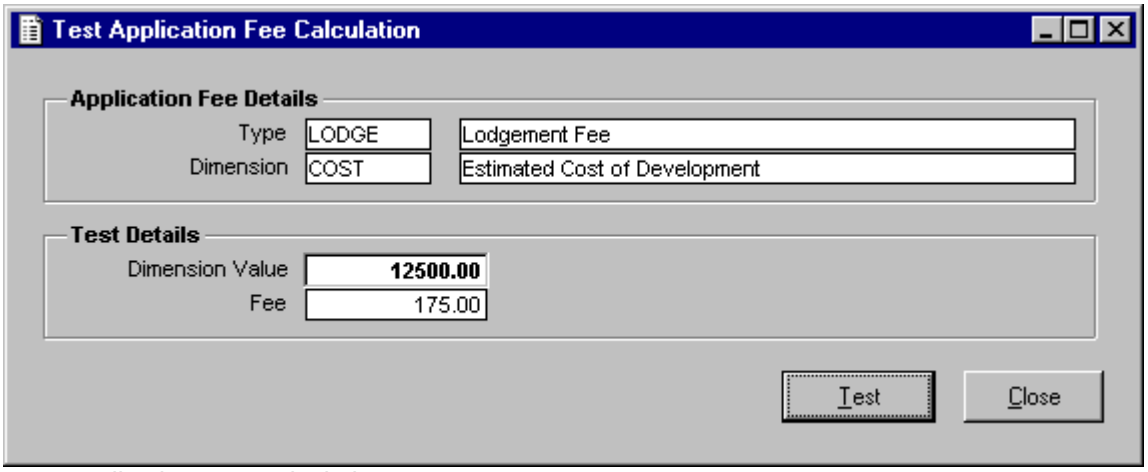
Incremental Calculations - Increment
The Increment field is used in conjunction with the Incremental Charge Rate field to calculate the fee. Based on the Increment value entered here determines the number of times to multiply the Charge Rate value.

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 Button
This button displays the Test Application Fee Calculation Form.

Test Application Fee Calculation Form

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



Test Application Fee Calculation Form

Application Fee Details - Description
The Application Fee Details section shows the Application Fee Type 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.

Calculation Formula Maintenance Form

The Calculation Formula Maintenance form is used to link the Fee Code Dimensions together to create a 'formula' for generating more complex Fee calculations.

The Calculation Formula is processed **after** the Dimension Range Calculations i.e. on the result.

To add a Dimension to use in the Formula, press the Insert button. The Dimension Type Pop Up form will be displayed automatically. Highlight the Dimension Type required and press the Select Button. The Calculation Formula Maintenance form is redisplayed with the selected Dimension Type added. Only Dimensions assigned to the Fee Code will be shown on the Dimension Type Pop Up.

Once added, Dimensions can be 'moved' around the formula using the 'up' and 'down' buttons on the right hand side of the form. The Up button moves the Dimension up in the list and vise-versa for the Down button.

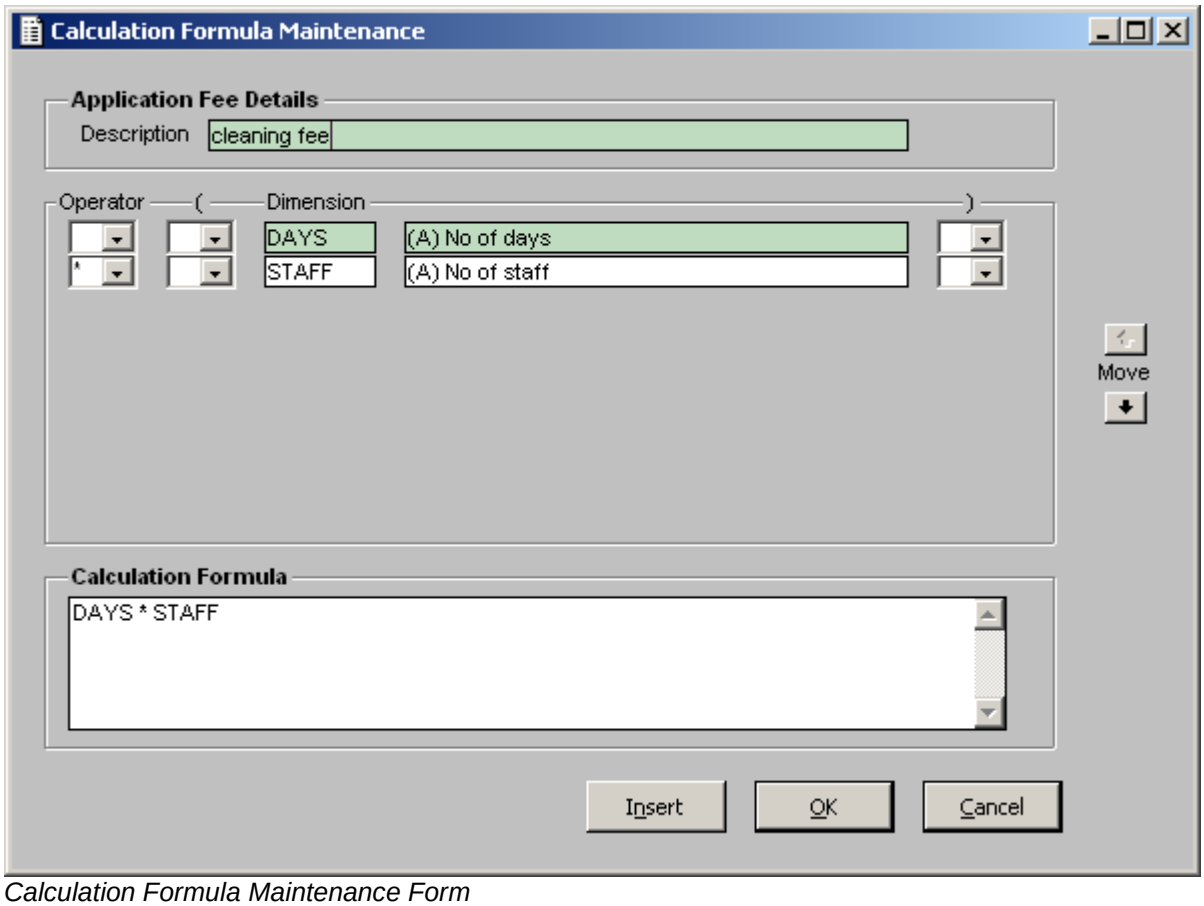
The Operator field has five values to choose from (shown in Arithmetical priority order):

* Mulitply
/ Divide
+ Add

- Subtract
  Blank (Default)

Brackets can be placed around Dimensions using the '(' and ')' fields. Brackets are used to control the order that the operators are applied to the formula.

Examples:
4 + 3 * 7 = 25 :Evaluated as 4 + (3 * 7) as '*' is a higher priority than '+'
(4 + 3) * 7 = 49



Calculation Formula Maintenance Form

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

Operator
The Operator field has five values to choose from (shown in Arithmetical priority order):

* Mulitply
/ Divide
\+ Add
\- Subtract
Blank (Default)

Left Bracket
Brackets can be placed around Dimensions using the '(' and ')' fields. Brackets are used to control the order that the operators are applied to the formula.

Examples:
4 + 3 * 7 = 25 :Evaluated as 4 + (3 * 7) as '*' is a higher priority than '+'
(4 + 3) * 7 = 49

Dimension

The Dimension Type and Description are shown to assist with the formulation of the calculation.

Right Bracket

Brackets can be placed around Dimensions using the '(' and ')' fields. Brackets are used to control the order that the operators are applied to the formula.

Examples:

4 + 3 * 7 = 25 :Evaluated as 4 + (3 * 7) as '*' is a higher priority than '+'

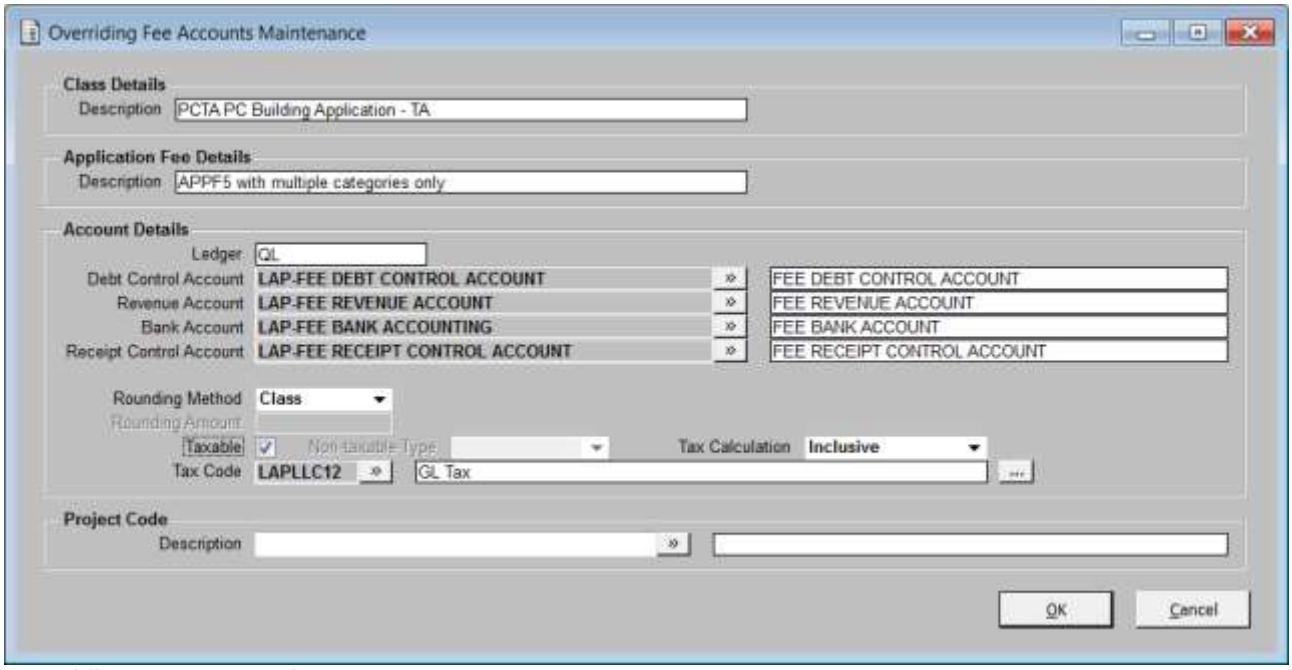
(4 + 3) * 7 = 49

Calculation Formula

The Calculation Formula is shown in the Calculation Formula field. This displays the actual calculation so that the User is able to see the result of the setup for the Formula.

Overriding Accounts Maintenance Form

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



Overriding Accounts Maintenance Form

Class Details - Description

This field details the Application Class selected.

Application Fee Details

This field details the actual Fee that the Overriding Accounts are being setup for.

Account Details

The Account Details Section of the form displays each of the following fields:

Ledger

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

Account Details

Fee Debit Account

The Fee Debit 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.

Fee Credit Account

The Fee Credit 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.

Receipt Debit Account

The Receipt Debit 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.

Receipt Credit Account

The Receipt Credit 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.

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 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 Details - Description

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.

Rounding Method

The Rounding Method allows the User to select from the options of Class, Up, Down, None and Closest. The Drop down box can be clicked and a Method chosen.

Class	The selection at the Class Type is used.
None	No rounding is performed.
Closest	Rounding is taken to the nearest amount.
Up	Rounding up is perfomed.
Down	Rounding down is performed.

Rounding Amount

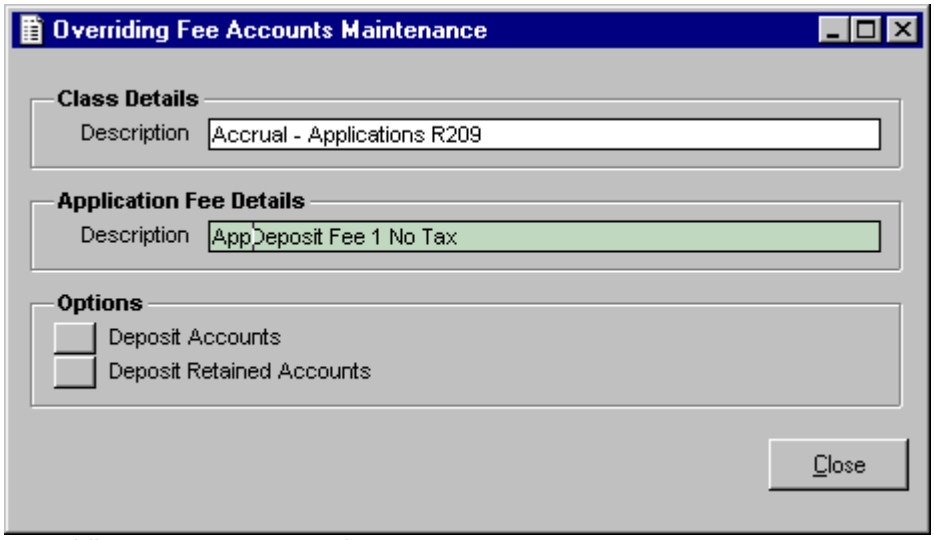
The dollar or cents value needs to be entered in this field for the Rounding Method to be effective.

Taxable Flag

If this fee is taxable set this flag ON, if set ON then a Tax code must be entered, if set OFF then a non-taxable code must be entered.

Tax Calculation Flag
If the Tax flag is set ON then this setting must be chosen. If the tax is to be included in the total of the fee then 'Inclusive' is set on, if the tax is in addition to the fee then 'Exclusive' should be set on.

Overriding Fee Accounts Maintenance Form



Overriding Fee Accounts Maintenance Form

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

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

Options - Deposit Accounts
Selection of this button displays the Overriding Fee Deposit Accounts Maintenance form.

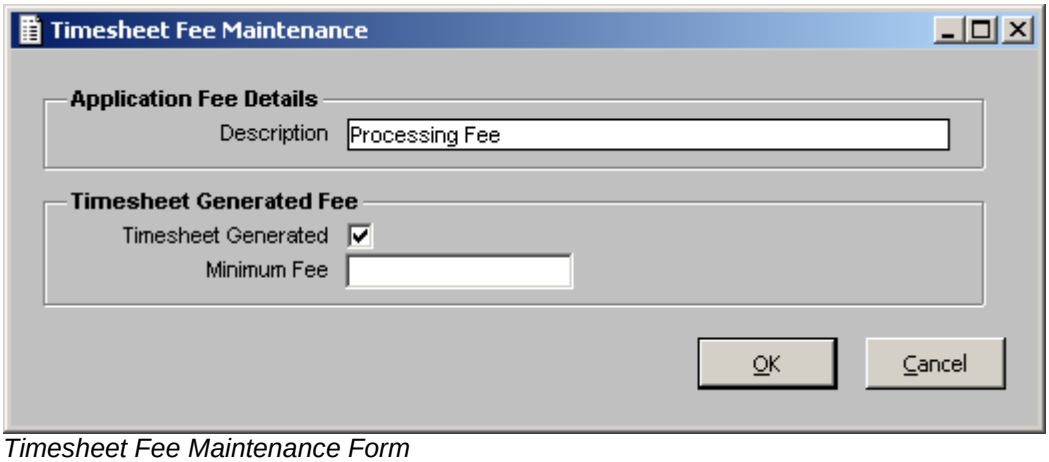
Options - Deposit Retained Accounts
Selection of this button displays the Overriding Fee Deposit Retained Accounts Maintenance form.

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

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

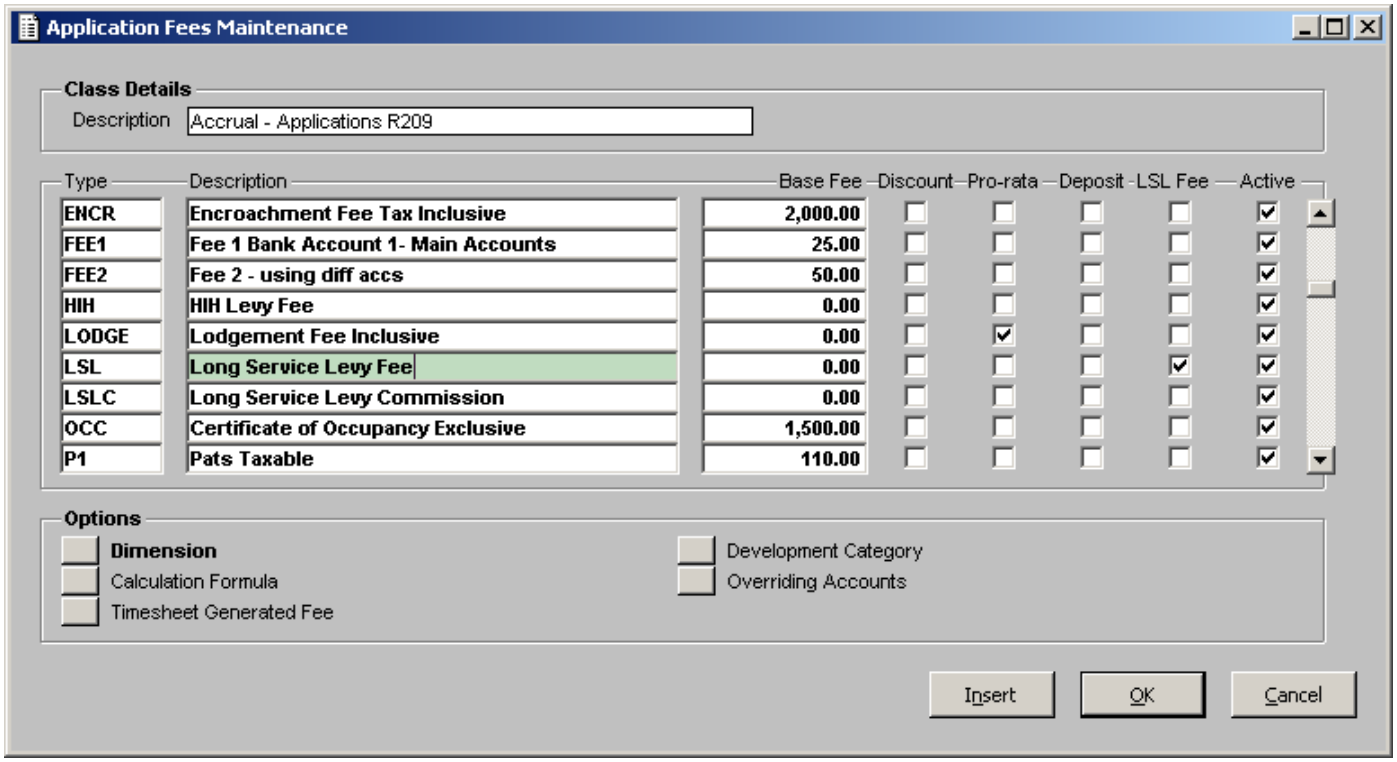
Timesheet Generated Fee – Minimum Fee
The Minimum Fee field is only available for entry if the Generated flag is 'On' otherwise the field is dimmed. If a Minimum Fee amount is to be generated for the Timesheet entry then this is where the Minimum Amount would be entered. When Timesheet entry is performed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

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.

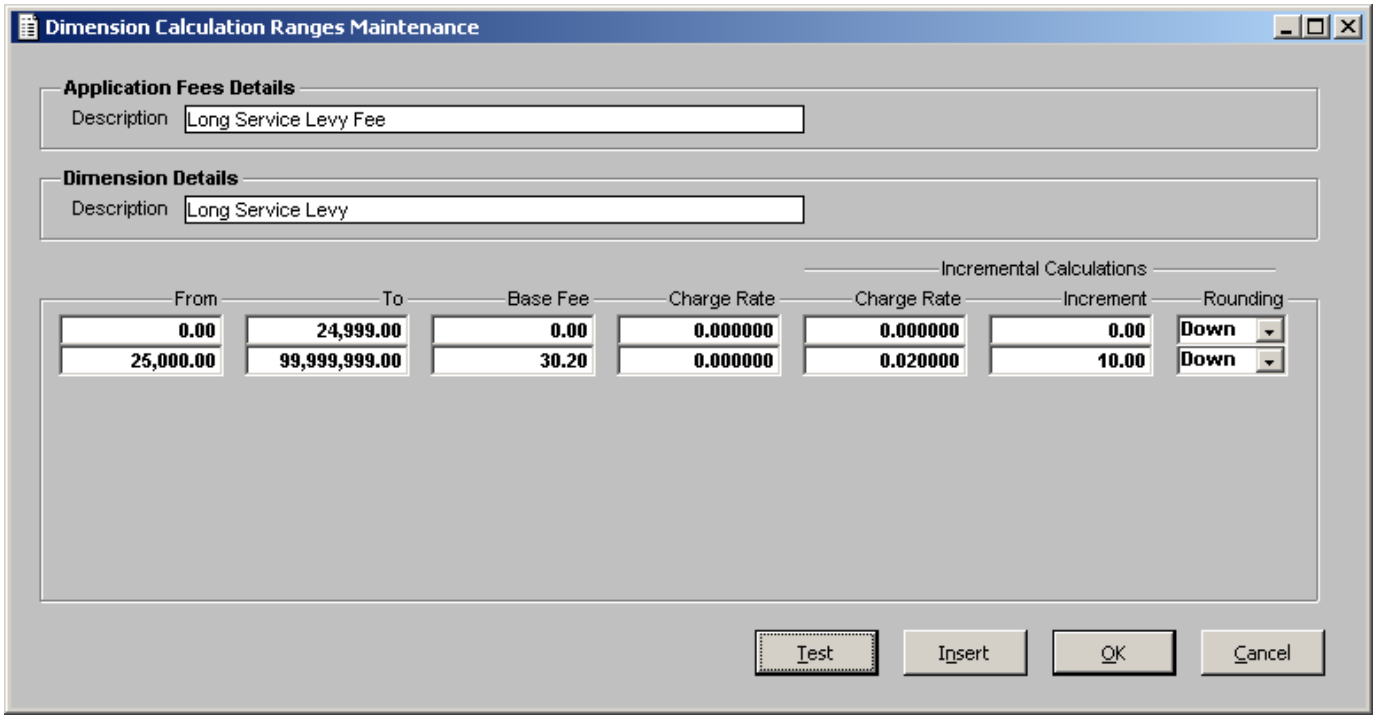
Long Service Levy Fees
As GST is only applicable on the Agents Fee and not the original Levy Fee two separate fees are required to be defined with the Long Service Levy Fee being ticked under the LSL Fee field.

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

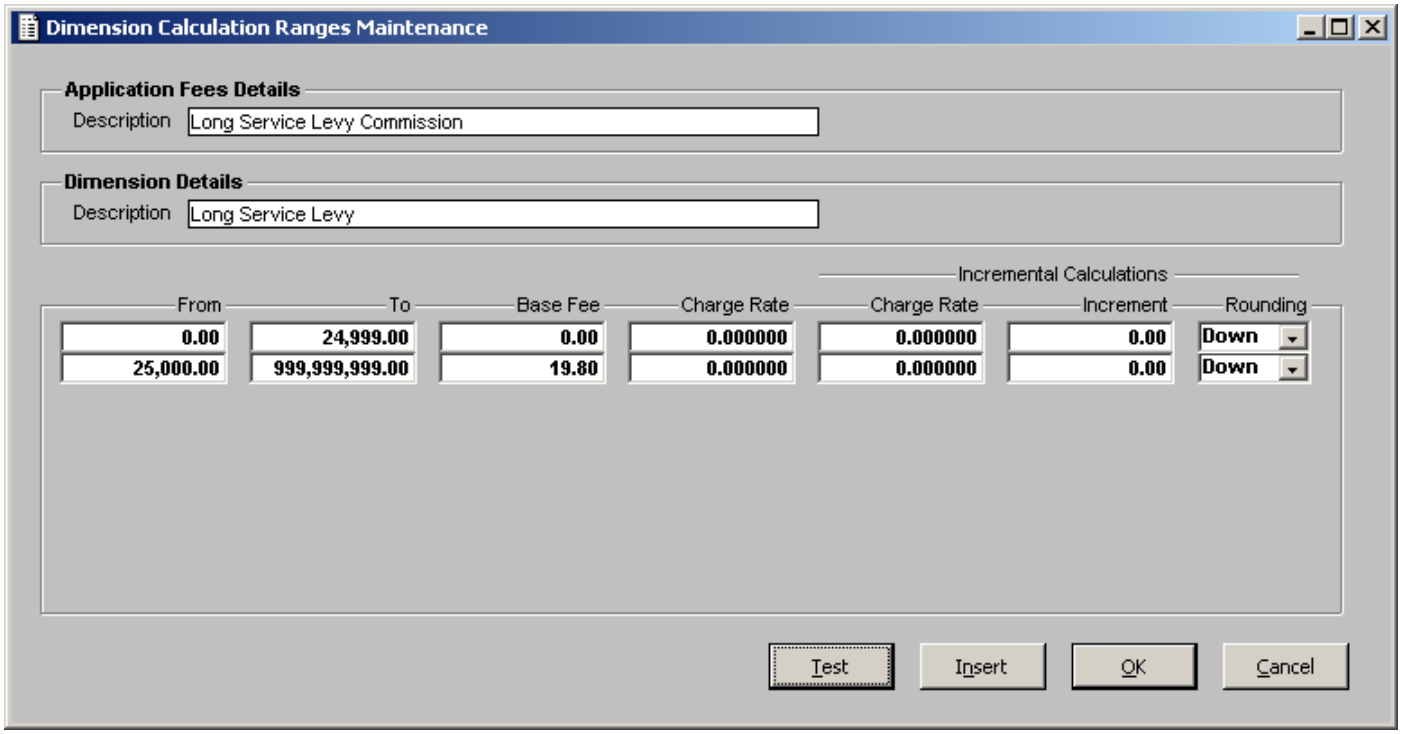


Each of the Fees require Dimensions to be defined for them. These Dimension should be set up as per the following:

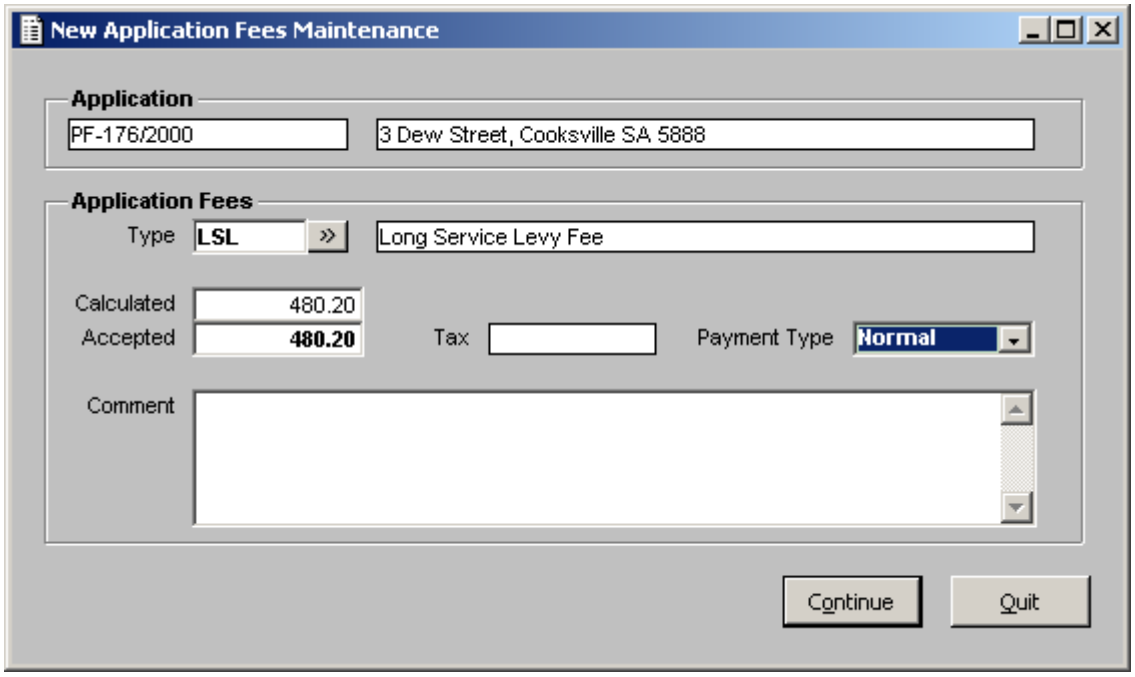
Long Service Levy Fee Dimension Setup



Long Service Levy Commission Dimension Setup



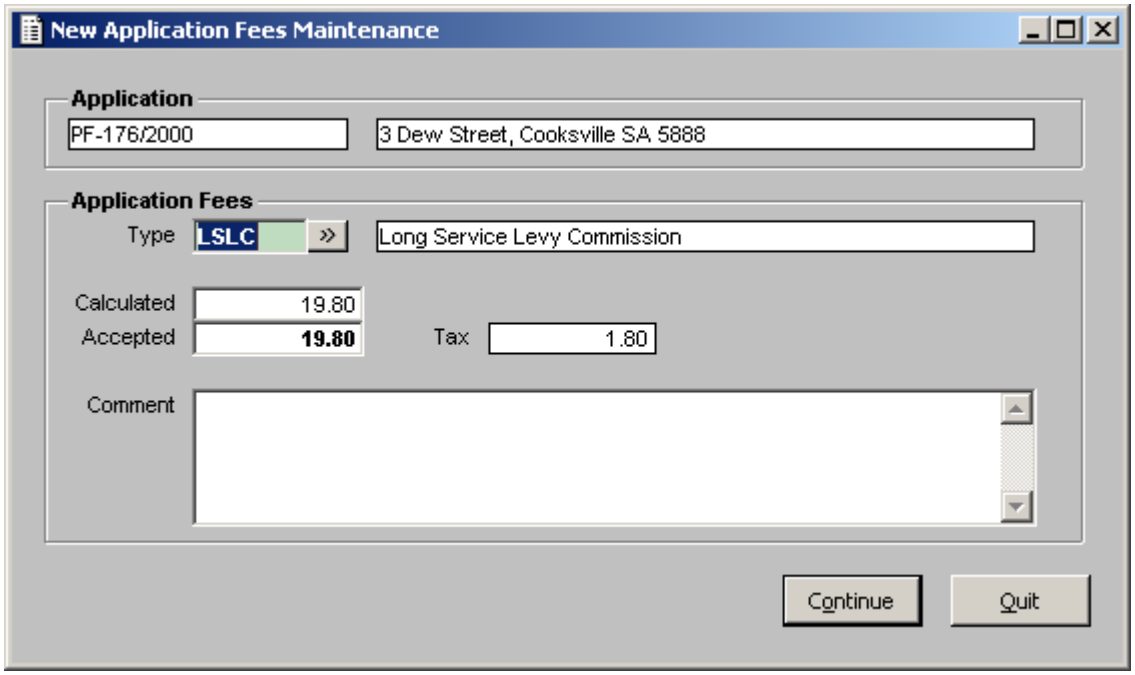
Entry of Long Service Levy Fee



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

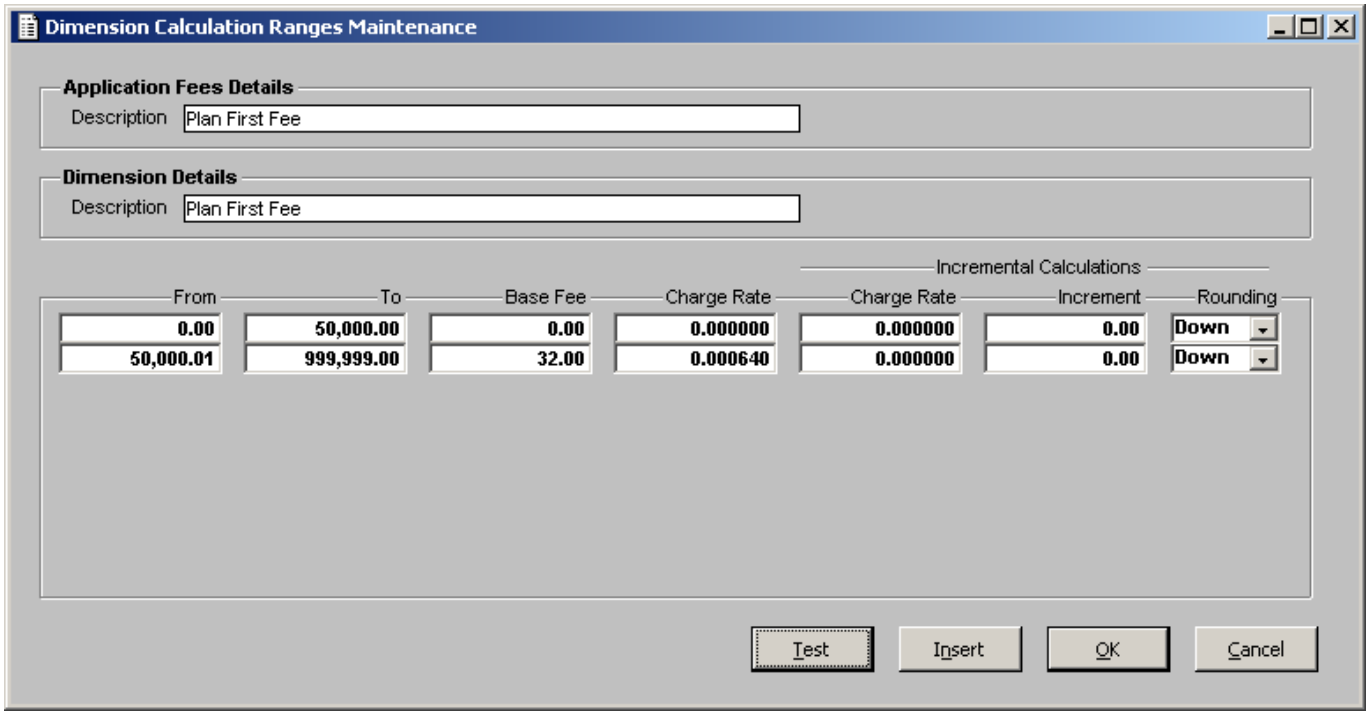


Note that the Long Service Levy Commission fee does not display the Pay Type field as it has not been defined as a LSL Fee. However the Dimension that has been defined for the Long Service Levy Fee is displayed upon entering the Long Service Levy Commission fee as it uses the same Dimension to calculate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

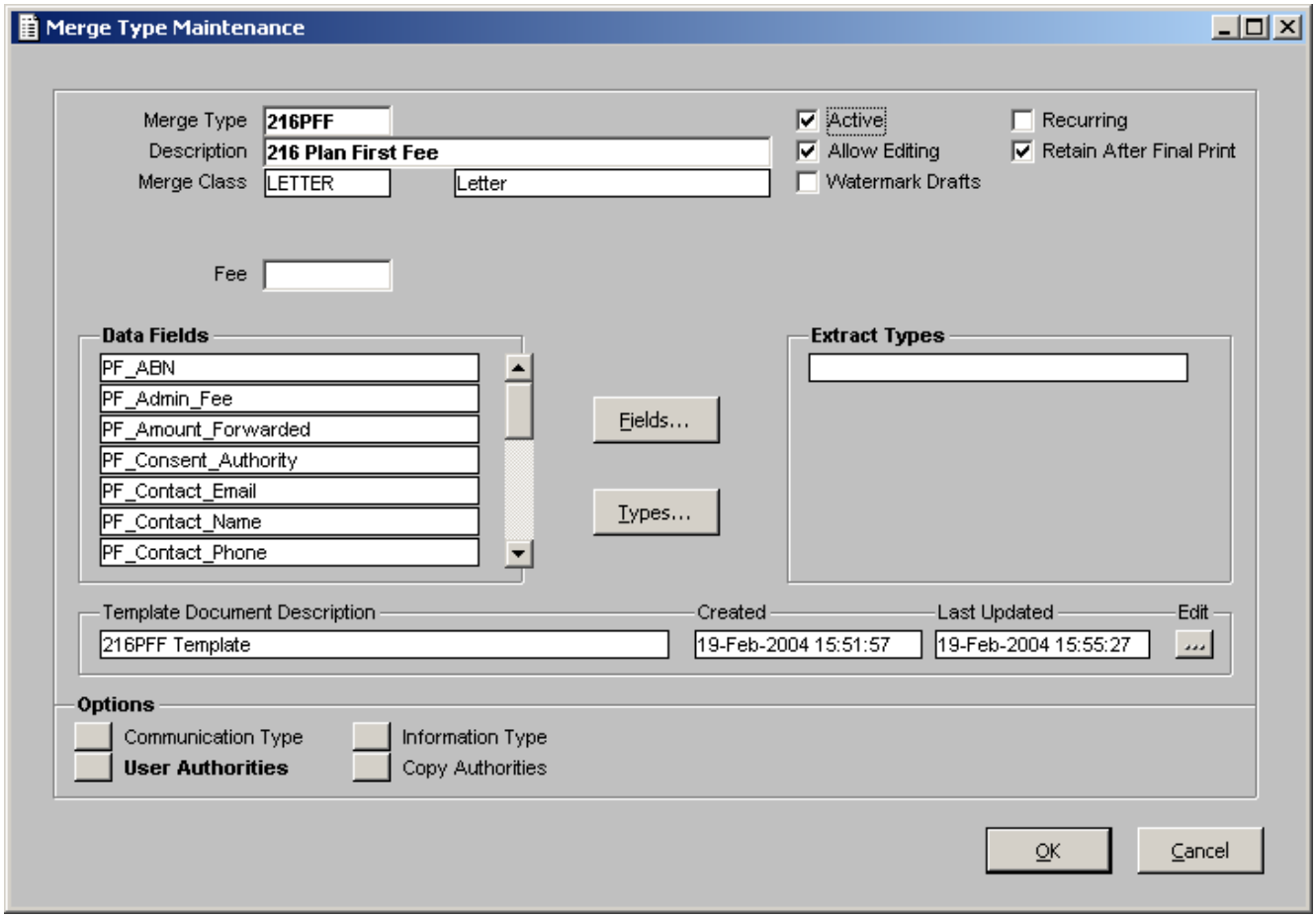
Plan First Fees
A Dimension to calcule the Levy must be setup against a Fee in Application Fee Parameters. This Dimension should be linked to the Report Control form so as to establish the amount of Levy to be extracted for each Application.

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:

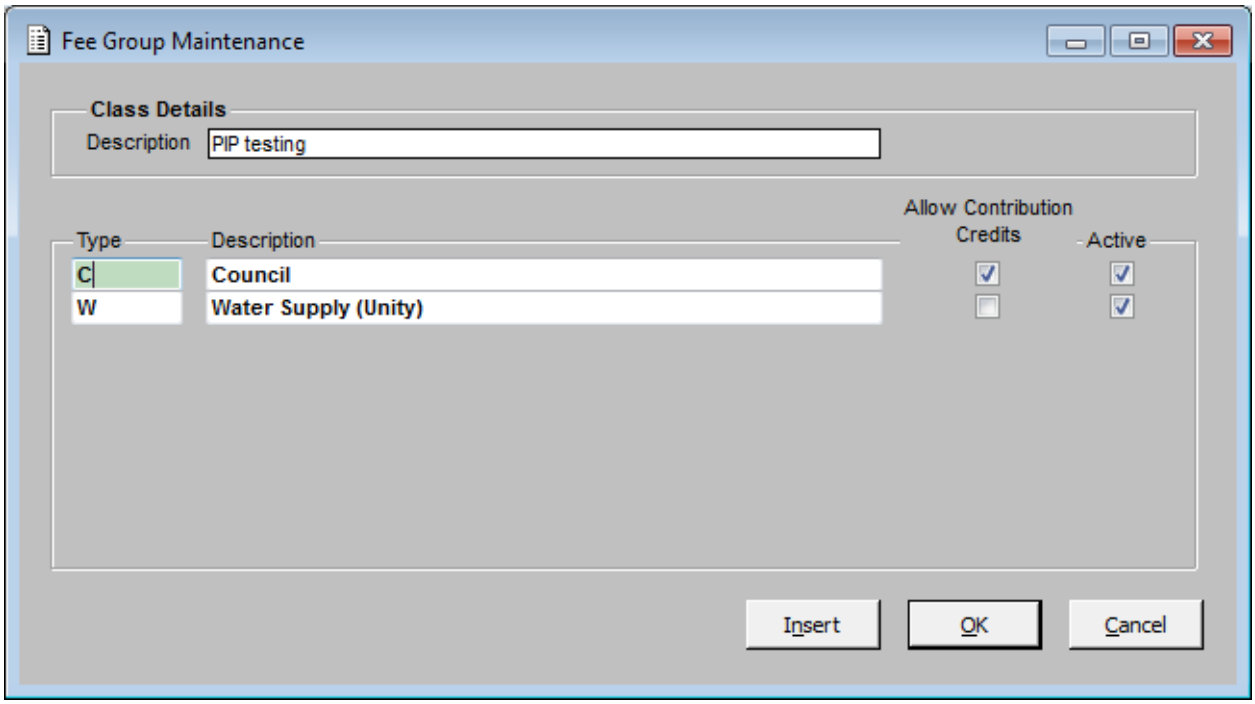
Merge Field	Document Field Equivalent
PF_ABN	ABN
PF_Admin_Fee	B: Total amount retained by consent authority
PF_Amount_Forwarded	C: Net amount forwarded to PlanningNSW
PF_Consent_Authority	Consent authority:
PF_Contact_Email	Contact e-mail:
PF_Contact_Name	Contact name:
PF_Contact_Phone	Contact phone:
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:

Contribution Plan Fees

The Development Plans function allows specific geographical areas of council to apply development schemes to applications lodged within that area and have those applicants contribute to the plans. Schemes may involve such things as Roads, Community Buildings, Open Spaces etc. These schemes may involve either Cash or Non Cash Contributions.
Development Contribution Plans may apply to specific Planning Precincts, Suburbs, Catchment Areas or specific zone types or landuse types.
Conditions are linked to Development Contribution Plans and the plans can be linked to both Parcel and Property records. Linking the Plan will automatically attach the conditions to the Parcel or Property.
It is assumed that a site will choose to link at either parcel or property not both.
Details of these Contribution Plans may be included within Property Certificates by creating Development Fees and Contribution Plan extracts to be associated with the Certificate Merge Type.

Fee Groups

Fee Groups are provided for use by the Contribution Fee function. A Fee group may be assigned to a contribution fee at the fee level or used to 'split' the fee into Proportional Shares.



Type
This field contains a 1 – 6 character code for the Fee Group.

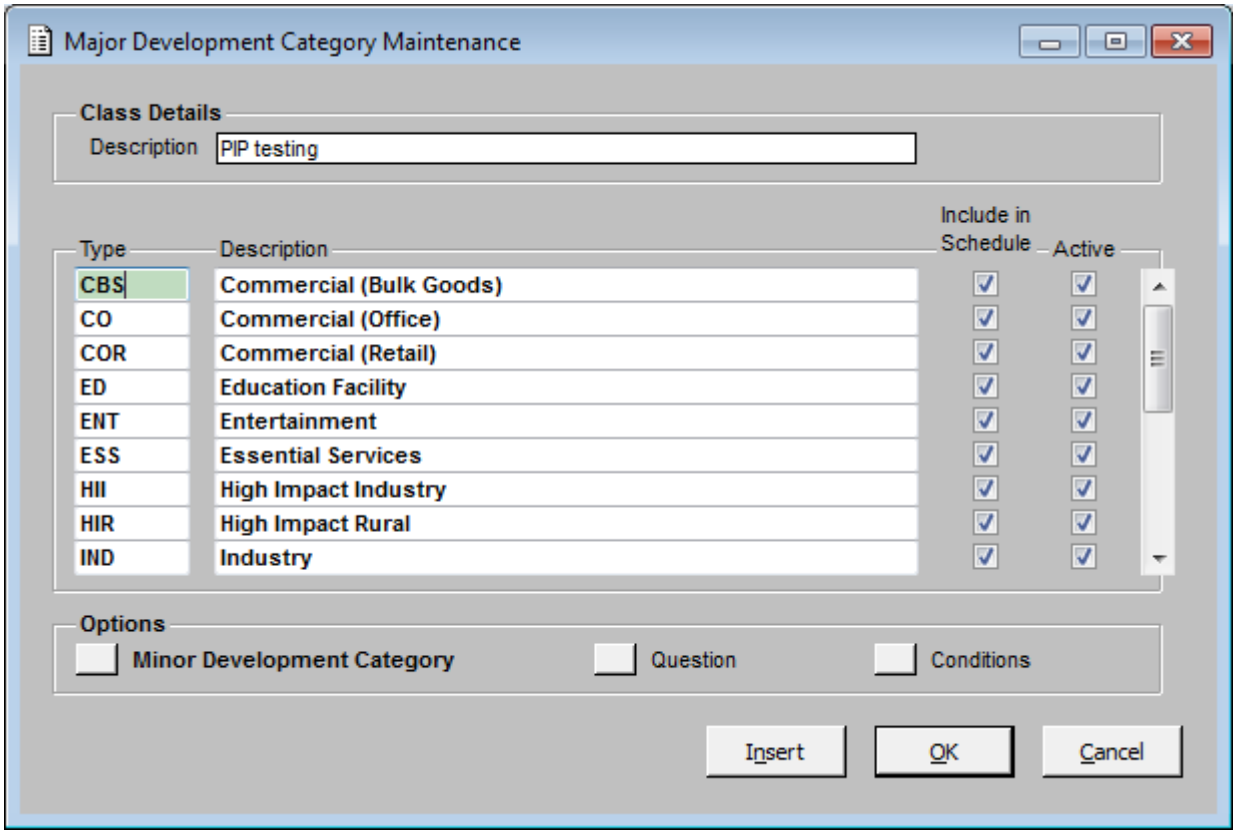
Description
This field contains the description of the Fee Group.

Allow Contribution Credits
This field indicates whether or not contribution credits are allowed for this fee group.

Active
If this field is checked on then the Fee Group is available for selection.
If this field is not checked on then the Fee Group will not be available for selection.

Major Development Category Maintenance Form

Z_LAPG9320



Class Details
The Class Details Field displays the Application Class that these Categories are assigned to.

Type
This field contains a 1-6 character code for the Major Development Category. This field is mandatory.

Description
This field contains a description fo rhte Major Development Category. This field is mandatory.

Include in Schedule
If this flag is checked on then this Development Category will be included in the Contribution Plan Fee Schedule.
If this flag is not checked on then it will not be included in the Contribution Plan Fee Schedule.

Active
If this flag is checked on then the Major Development Category will be available for selection.

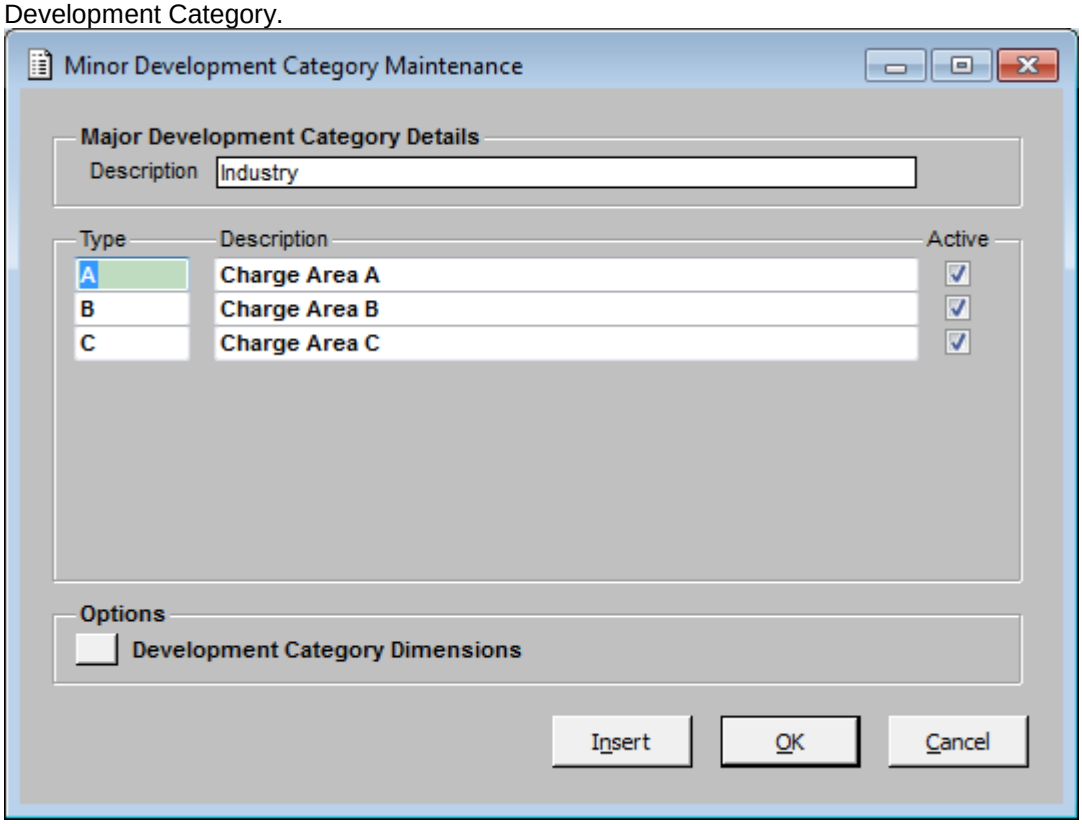
Options – Minor Development Category
Clicking this button will take you to the Minor Development Category Maintenace form where you can set up Minor categories associated to the Major Category that currently has focus.

Options – Question
Clicking this button will take you to the Question Maintenance form where you can set up a questionnaire associated with the Major Category that currently has focus.

Options – Conditions
Clicking this button will take you to Application Conditions Maintenance where you can set up Conditions that will apply to the Major Category that currently has focus.

Minor Development Category Maintenance

This form allows for the set up of Minor Development Categories that are associated with a Major Development Category.



Description
This field contains the description of the Major Category to which the Minor Categories are linked.
Type

Type
This field contains a 1-6 character field for the Minor Category. This field is mandatory.

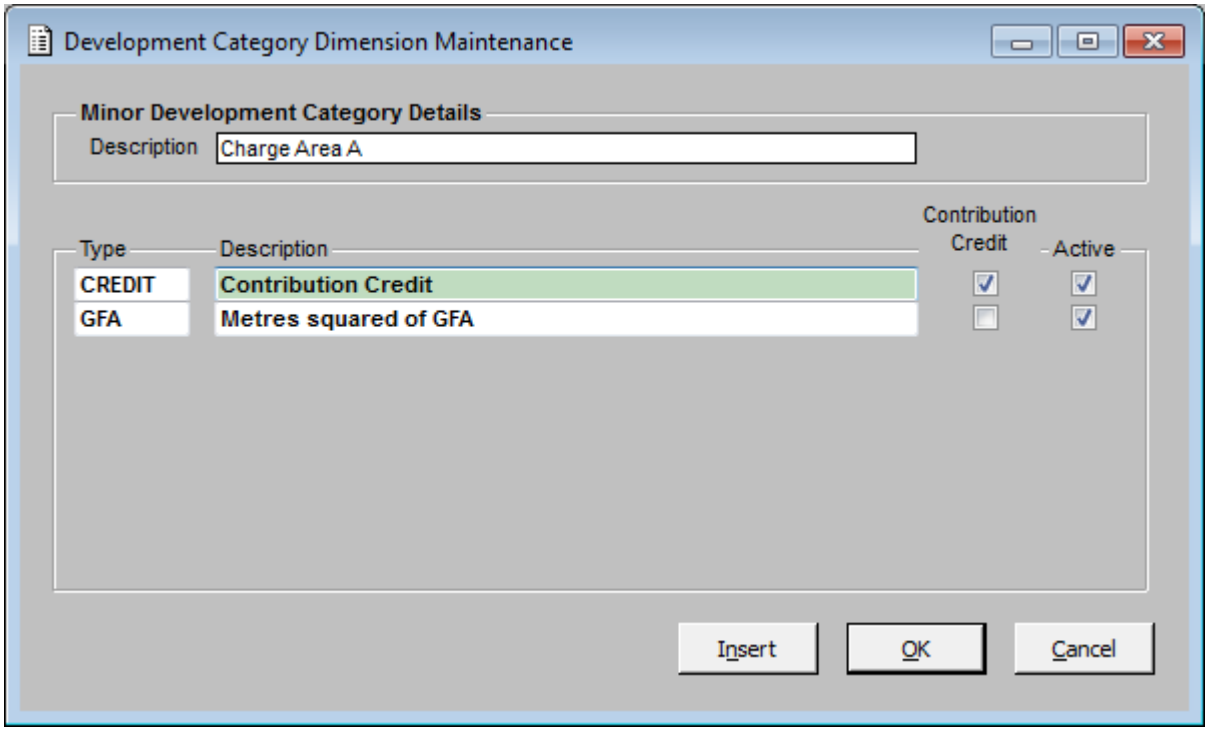
Description
This field contains the description of the Minor Category.

Active
If this field is checked on then the Minor Development Category is available for selection.
If this field is checked off then the Minor Development Category is not available for selection.

Options - Development Category Dimensions
Clicking this button will take you to the Development Category Dimension Maintenance form.

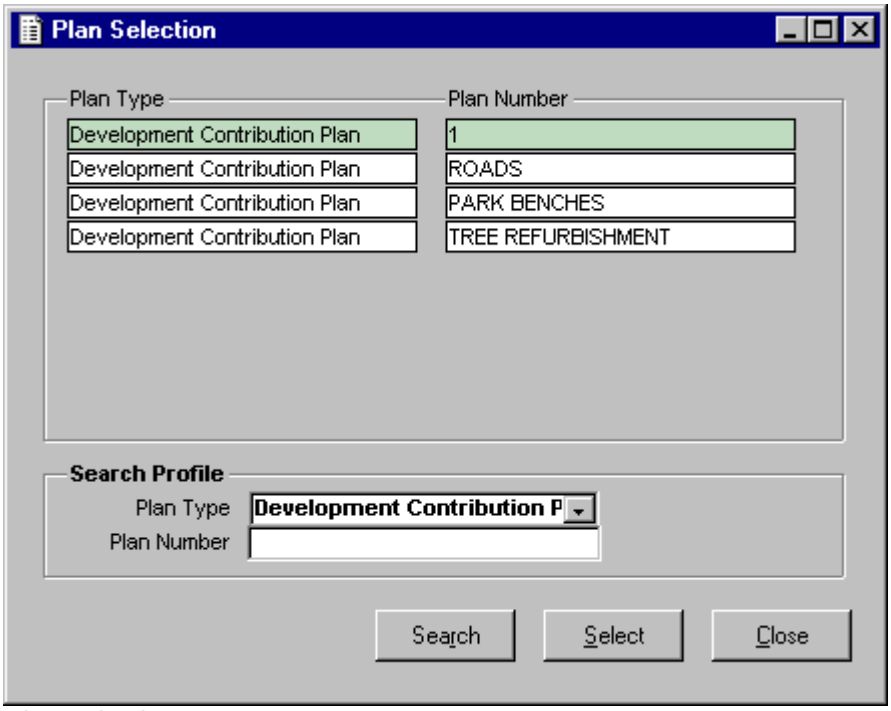
Development Category Dimension Maintenance

This form will allow you to set up Dimensions associated with the Minor/Major Category. These Dimensions can then be used in Fee Calculation.



Description
This field contains the description of the Minor Development Category to which you are assigning Dimensions.
Type
This field contains a 1-6 character code for the Dimension.
Description
This field contains a description of the Dimension.
Contibution Credit
Checking this flag on indicates to the system that this dimension is used for Contribution Credits.
Active
If this field is checked on then the Dimension will be available for selection.
If this field is not checked on then the Dimension will not be available for selection.

Contribution Plan Selection Form



Plan Selection Form

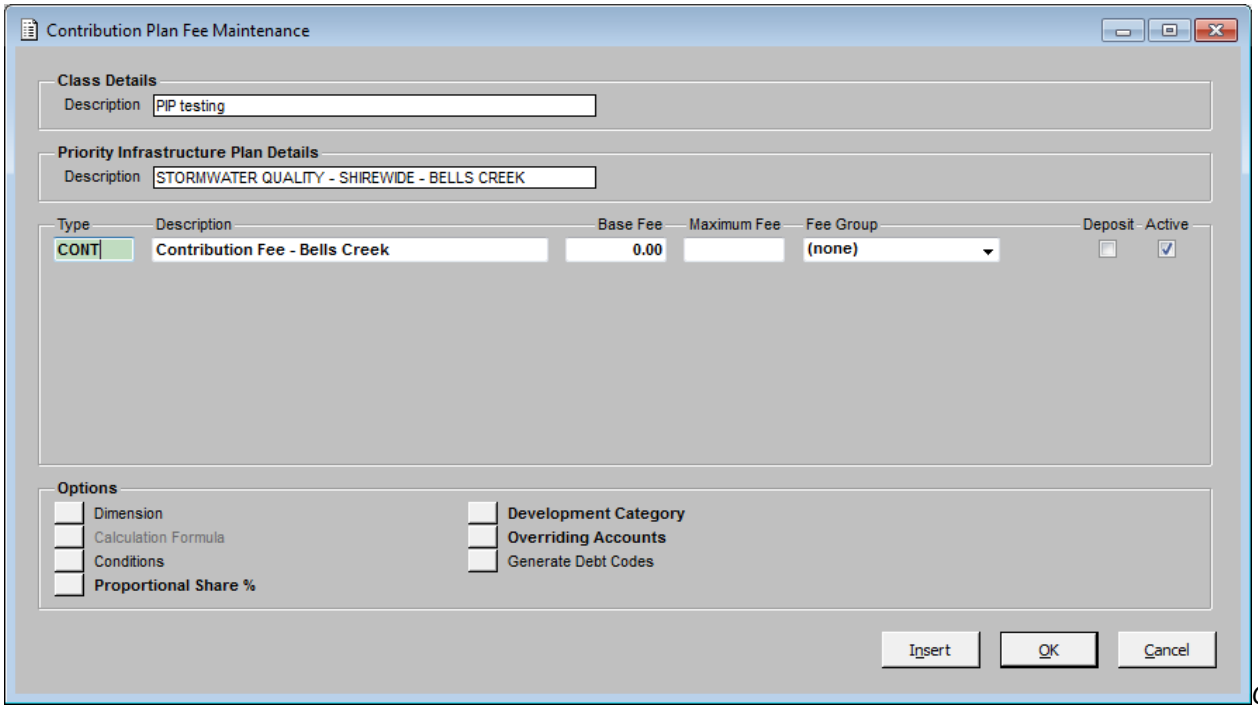
Plan Type
This field displays the Plan Type.

Plan Number
This field displays the Plan Number.

Search Profile – Plan Type
Enter a Plan Type or part thereof on which to base the search.

Search Profile – Plan Number
Enter a Plan Number on which to base the search.

Contribution Plan Fees Maintenance Form



Contribution Plan Fee Maintenance Form

Class Details – Description

This field displays the Application Class Description. The Description field is display only and may not be maintained.

Development Contribution Plan Details – Description

This field displays the Development Contribution Plan Description. This field is display only and may not be maintained.

Type

This field contains the Contribution Plan Fee Code. Up to six alphanumeric characters may be entered.

Description

This field is a detailed description of the Development Contribution Plan Fee.

Base Fee

This field may display the dollar value that can be attached to an Application 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

Maximum Fee

This field allows for a maximum charge for a Contribution Plan Fee. If the calculation of the fee exceeds this amount then the calculated amount will be set to the Maximum Fee.

Fee Group

Allows for the selection of a Fee Group to the contribution. Contribution fees may be split across different Fee Groups attracting different percentages if required. (See Proportional Share %)

Deposit

Check this box if the Development Contribution Plan Fee is to be used as a Deposit Fee.

Active

This field if checked on will allow this Development Contribution Plan Fee to be selected when assigning Fees to an Application. If this field is not checked on, then this Development Contribution Plan Fee is not available for selection

Options – Dimensions

Dimensions may be entered against a particular Fee. The Creation and Modification of Dimensions is detailed in a separate area.

Options – Development Category

This function allows the User to set up specific categories by Development. This then allows each Application to be categorised. Each Category can have different base fees and dimensions linked to them.

Options – Calculation Formula
The Calculation Formula Option is used to setup how the Fees in the Contribution Plan are to be used. Whether they are to be added together or other calculations applied to them to work out the final value.

Options – Overriding Accounts
Selecting the Overriding Accounts Option Button displays the Overriding Contribution Accounts Maintenance Form.

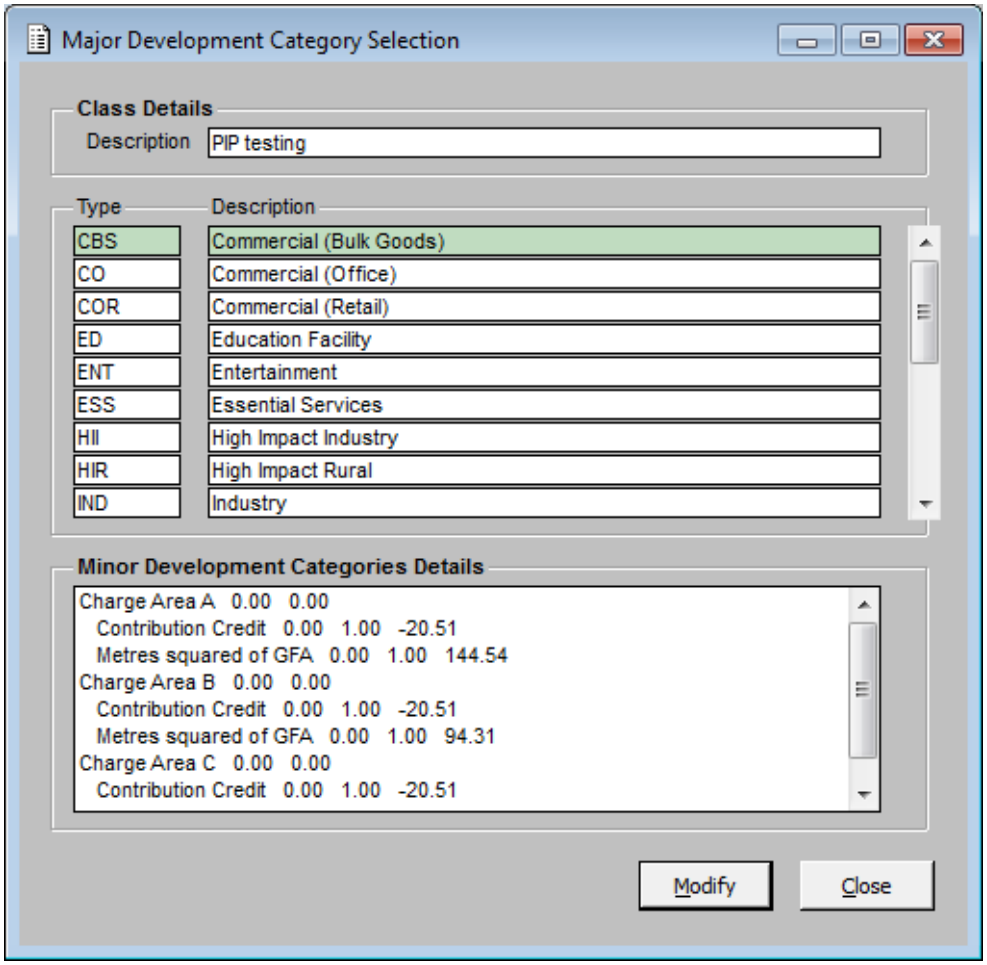
Options – Conditions
Selecting the Conditions Option Button displays the Application Conditions Maintenance Form. Conditions may be attached to Development Contribution Plan Fees.

Options – Generate Debt Codes
Selecting the Generate Debt Codes Option Button will update the Debtors Debt Types with Fees from this option. This is only applicable if the Pathway Debtors Module has been nominated as the Contribution Plan Accounting Method within the System Parameters for this Application Class.

Options – Proportional Share %
This option will allow the calculated fee amount to be split into two or more fees based on a percentage provided. For each of the share percentages a Fee Group can be assigned. A Fee Group assigned to a share will override any Fee Group assigned at the Contribution Fee type.
If a Maximum Charge has been specified for the contribution Plan Fee then the maximum charge will be applied to the fee before any share% is applied.

Major Development Category Selection

This form displays all Major Development Categories available for setup for the currently selected Contribution Schedule and Contribution Fee.



Description
This field displays the name of the Class.

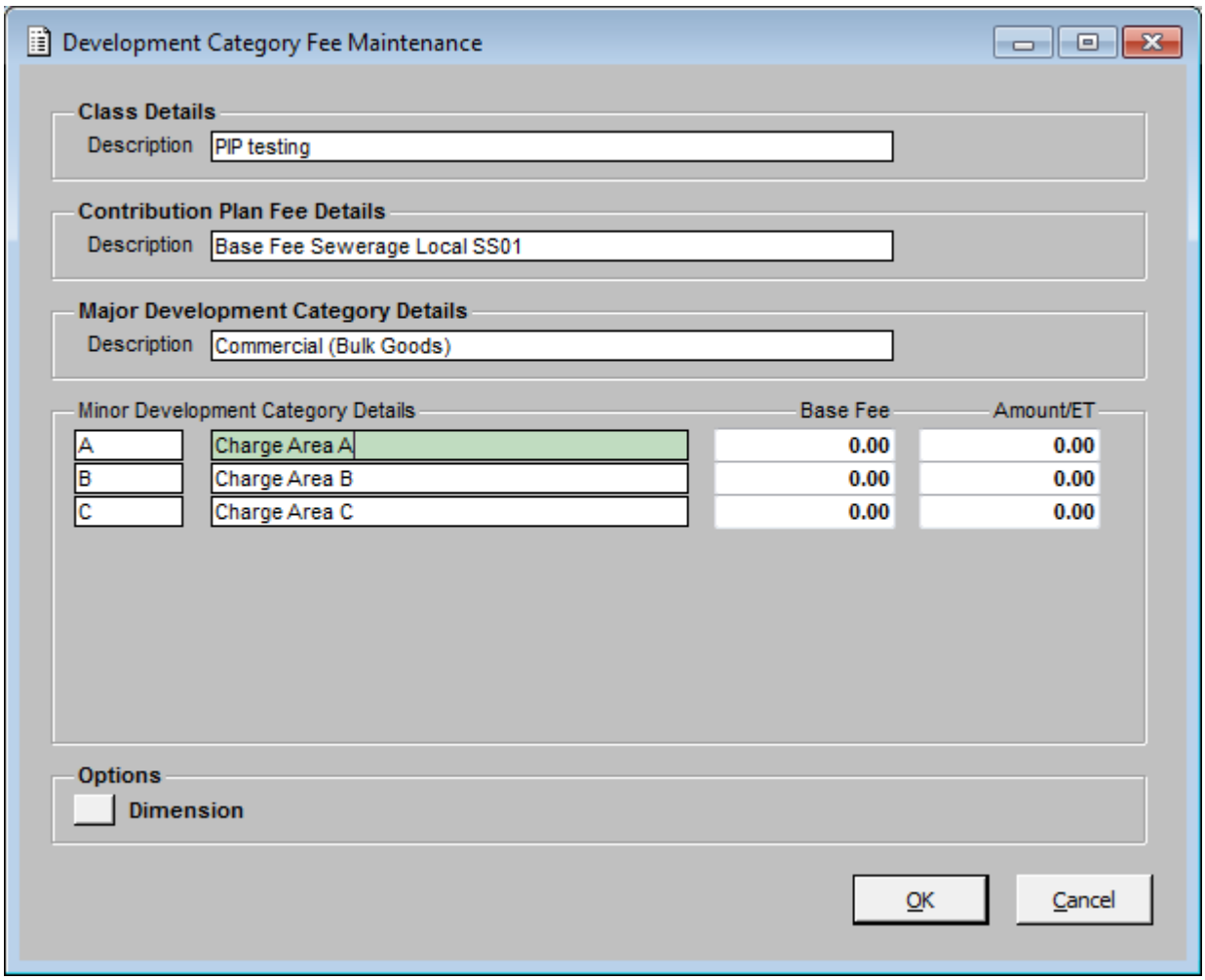
Type
This field displays the code for each of the Major Development Categories. It may not be maintained.

Description
This field displays the description for each of the Major Development Categories. It may not be maintained.

Minor Development Categories Details
This field shows the summary of the Minor Categories >> associated Dimension and Dimension Values for the Major Category. The field may be scrolled through or “Zoomed” by double clicking on it.

Development Category Fee Maintenance Form

This form details the Category Fee and any Minor Development Categories assigned to the Major Development Category.



Development Category Fee Maintenance Form

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

Contribution Plan/Application Fee Description
This field details the Application or Contribution Fee that is currently displayed.

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

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

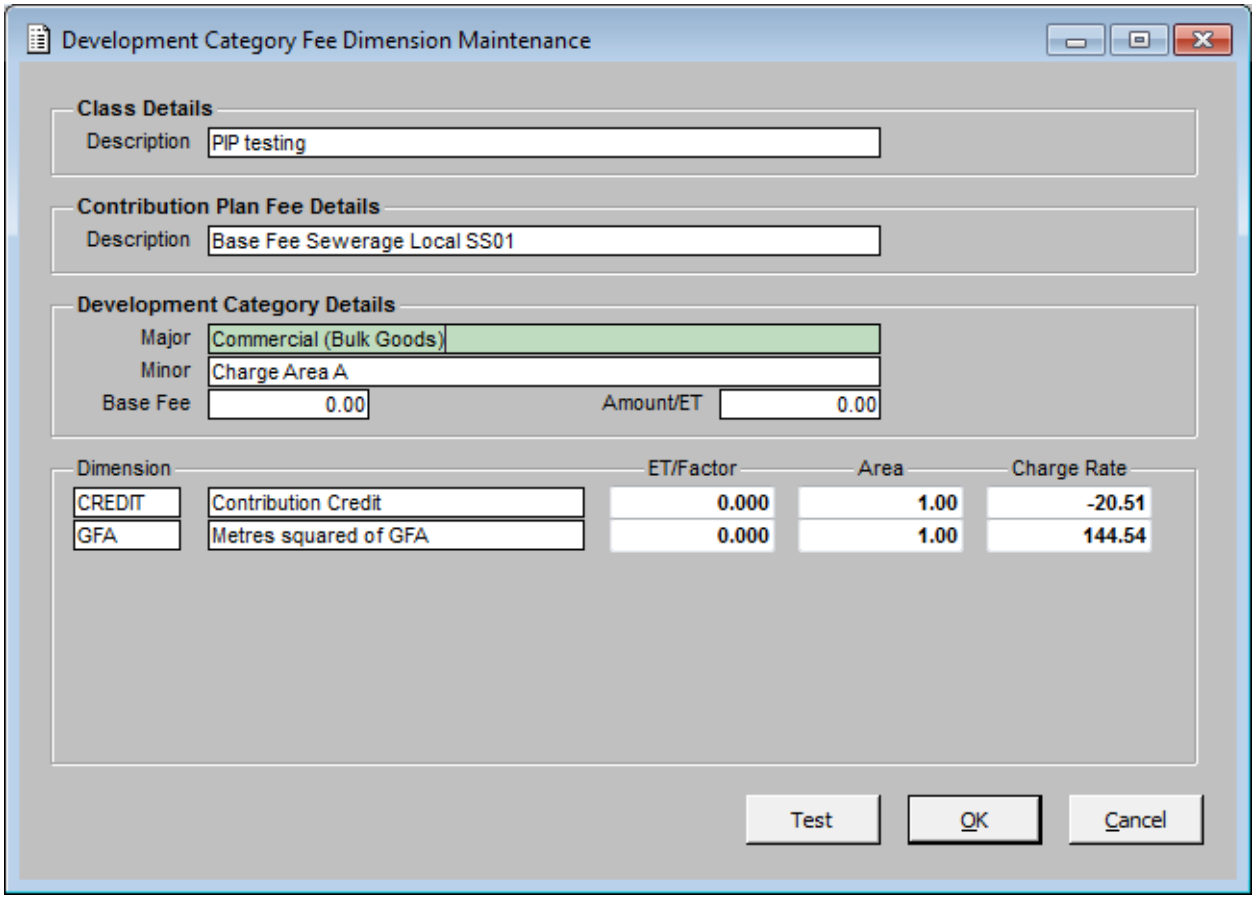
Base Fee
This amount will be applied to the calculated fee regardless of any other calculations.

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

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

Development Category Fee Maintenance Form

Z_LAPG9246



Development Category Fee Maintenance Form

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

Application Fee
This field details the Application Fee that is currently displayed.

Development Category

This field details the Major Development Category and Minor Development Categories that the Fee is assigned to.

Dimensions

This field details the dimensions and charges to be set against this particular Category. The code may be keyed in if known, or the Pop Up Button used to display predefined dimension codes.

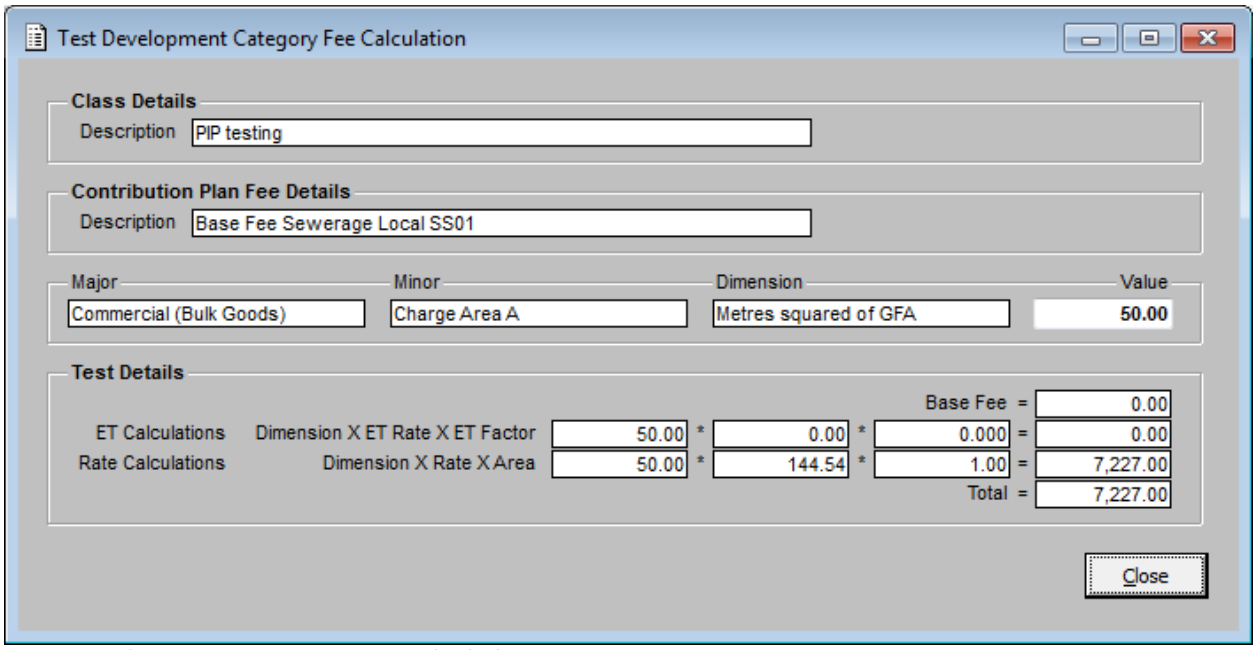
ET/Factor
This field is used to calculate the Extra Tenement Factor. This may be used to calculate an extra fee based upon how many rooms are in a house, and this fee is a levy for such items as sewerage. In this instance, the more rooms a house has, then the ET factor would be higher for a 5-bedroom home than a 1-bedroom unit. An example of how the fee is calculated;
Base Fee PLUS Dimension MULTIPLIED by Amount/ET MULTIPLIED by Factor PLUS Dimension MULTIPLIED by Rate MULTIPLIED by Area.
Base of 10
Dimension of 2
Amount ET of 5
Factor of 5
Rate of 1
Area of 10

10	10
+2 x 5 x 5	50
+2 x 1 x 10 =	20
	80

Area
This field may be used to enter a particular area for calculation of the fee. (If no area applies then a 1 should be used)

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

Test Development Category Fee Calculation Form



Test Development Category Fee Calculation Form

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

Contribution Plan Fee Details
This field details the Fee that is currently displayed.

Major
The Major field displays the description of the Major Development Category that the Test function is being looked at.

Minor
The Minor Development Category associated to the Major Category is shown in this field.

Dimension
The Dimension that is applicable for the Test function is displayed in this field.

Value
The Value Field is used for the entry of the Test figure. This is then used in the Test Details area to show what the outcome of the calculation will be. Enter in the Value required and then Tab out of the field for the calculation process to occur.

Test Details

The Test Details shows the calculation of the fee based on the Major / Minor & Dimension details for the Value that has been entered. The ET Calculations and Rate Calculations are shown to allow the User to see how the calculation has been done.
To manually check your calculation use the following formula:
For a Range Value
Base Fee PLUS
Dimension X Charge PLUS

Charge X Increment of Dimension

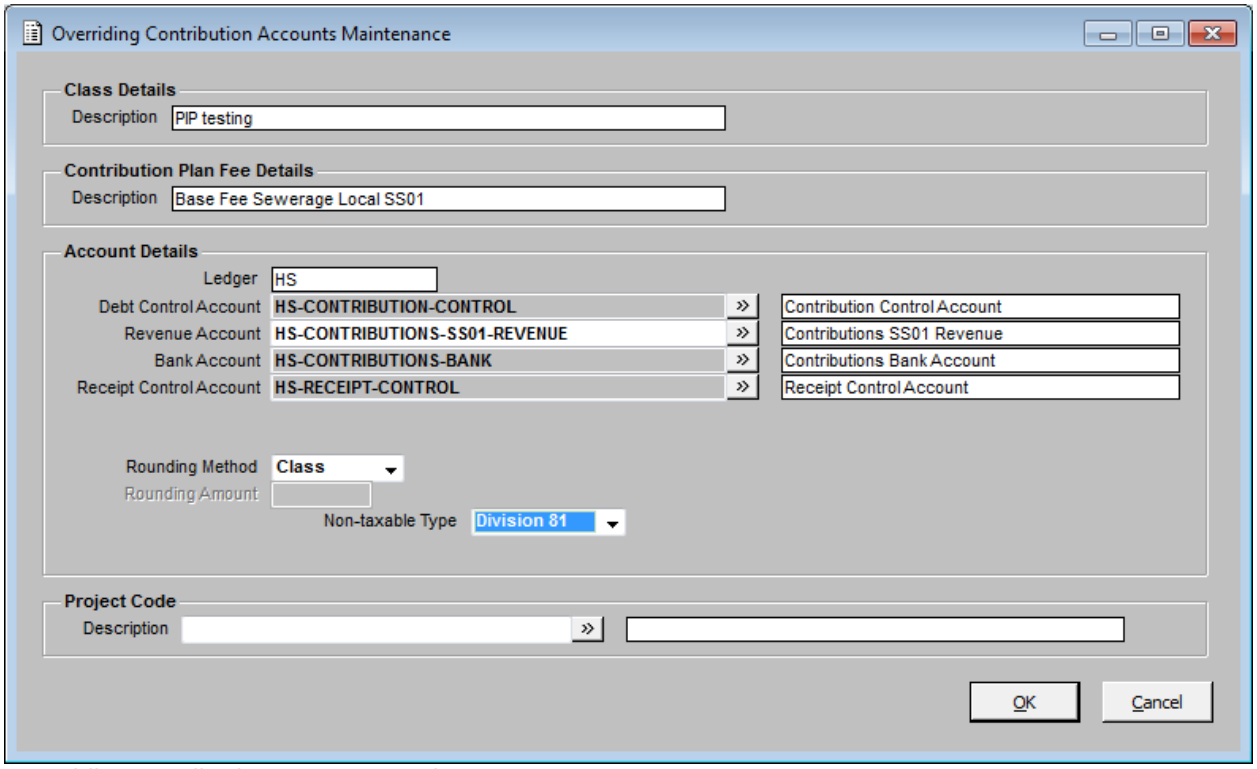
For each Development Category
Base Fee PLUS
Dimension X Amount/ET X ET PLUS
Factor
Dimension X Rate X Area

Overriding Accounts Maintenance Form

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

The account numbers displayed in grey are the system defaults and have not been 'overridden'.

If the account number shows with a white background then this is an override account. In the example below the Revenue Account has been overridden from the system default.



Overriding Contibution Accounts Maintenance Form

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

Contribution Plan Fee Details - Description
This field details the actual Fee that the Overriding Accounts are being setup for.

Account Details
The Account Details Section of the form displays each of the following fields:

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

Account Details

Debt Control Account
This account is the Debtors Control Account within the ledger. Not applicable for Cash Accounting.

Revenue Account
This account represents the income account for the fee.
Bank Account
The Bank Account that will be used when receipting to this fee.
Receipt Control Account
A separate Control Account may be nominated for recording income.

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

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 7 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 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 Details - Description

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.

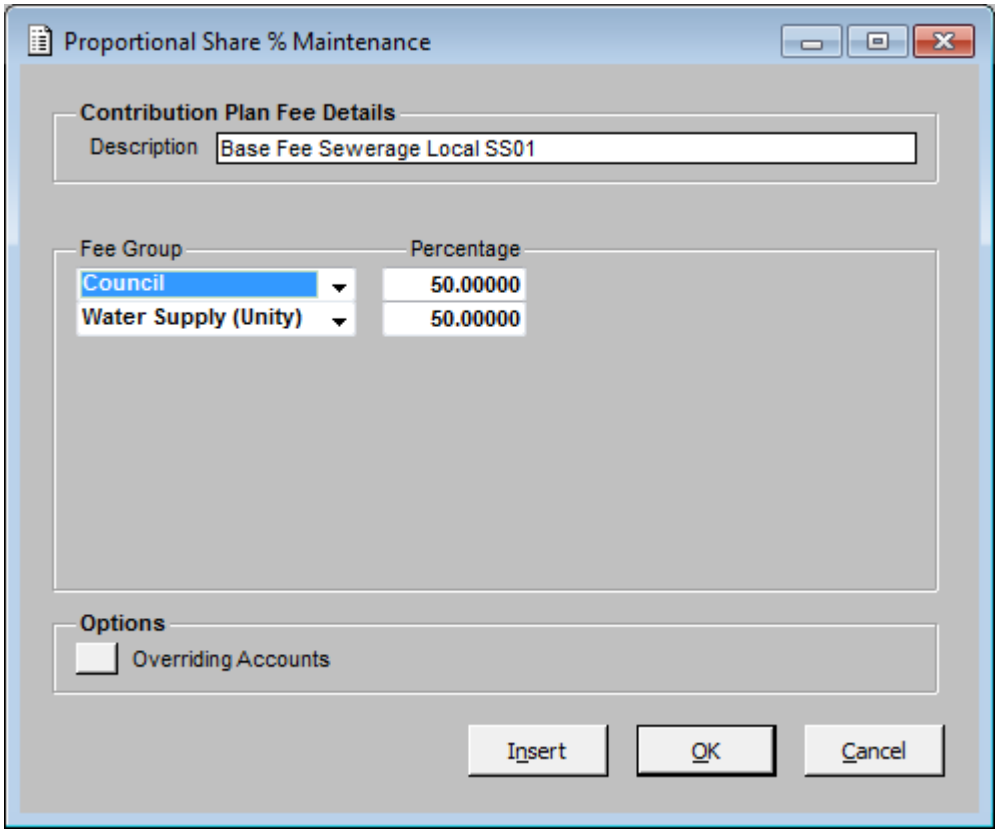
Proportional Share %

This form allows for the set up of percentage shares for the Contribution Fee created.

When a share is set up the Contribution Fee will be split according to the percentages nominated and will be shown separately on the Application along with the Fee Group assigned.

Fee Groups nominated on the Share will override any fee group at the Contribution Fee level.

The Percentages must equal 100%



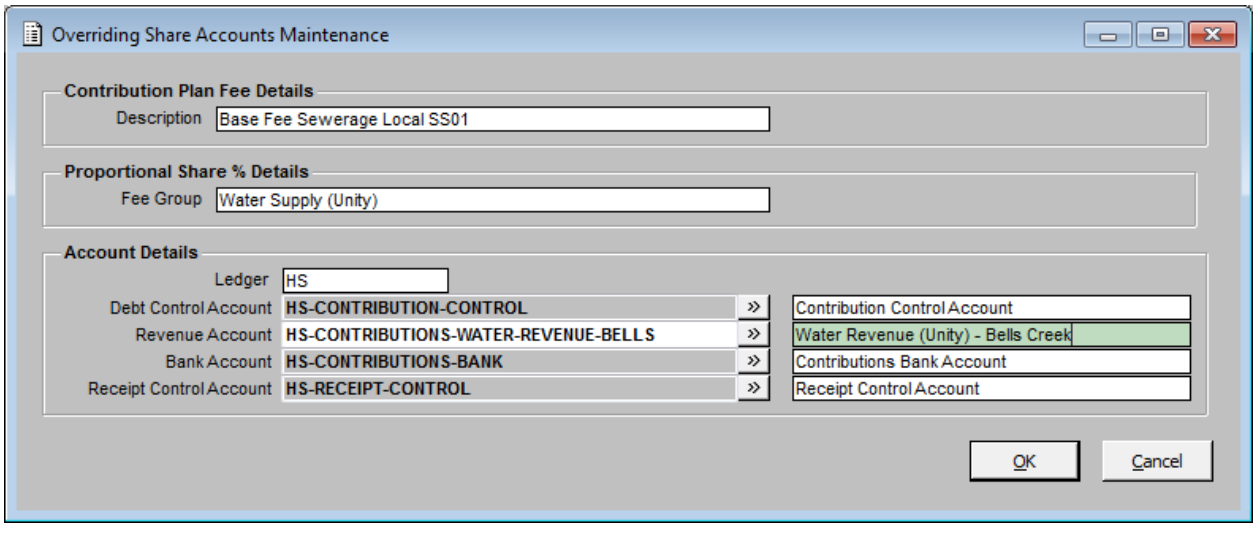
Fee Group
Select a Fee Group that you wish to assign a share of the Contribution to.

Percentage
Enter the percentage value of the share for the Fee Group.

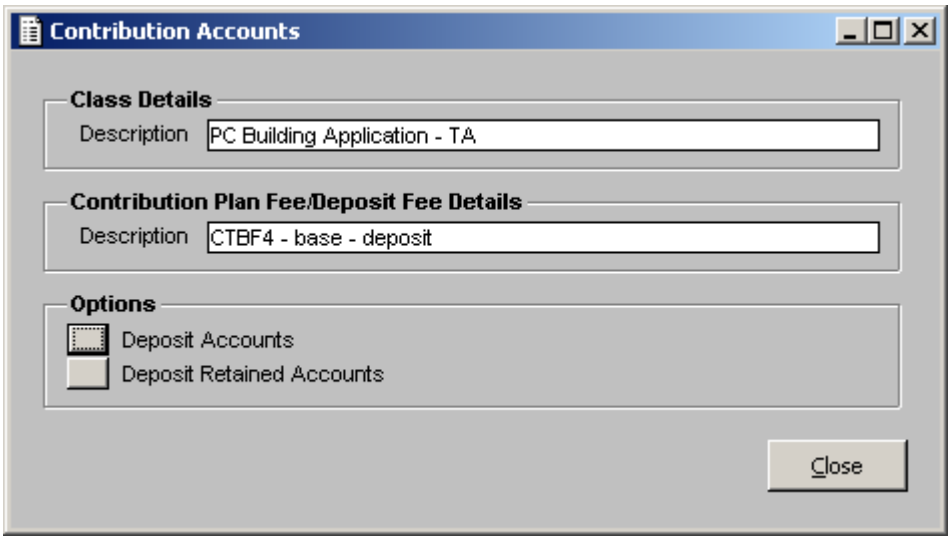
Options – Overriding Accounts
Clicking this button will take you to the Overriding Share Accounts Maintenance form.

Overriding Share Accounts Maintenance

This form will allow the council to nominate overriding accounts at the individual share if desired.
In the example below we have nominated that the Revenue for the Water Supply Fee Group Share will be directed to a specific account.



Overriding Fee Contribution Accounts Maintenance Form



Overriding Fee Contribution Accounts Maintenance Form

Class Details - Description
Z_LAPQ9243_LAPFECD_DMYTARGET1
This field details the Application Class selected.

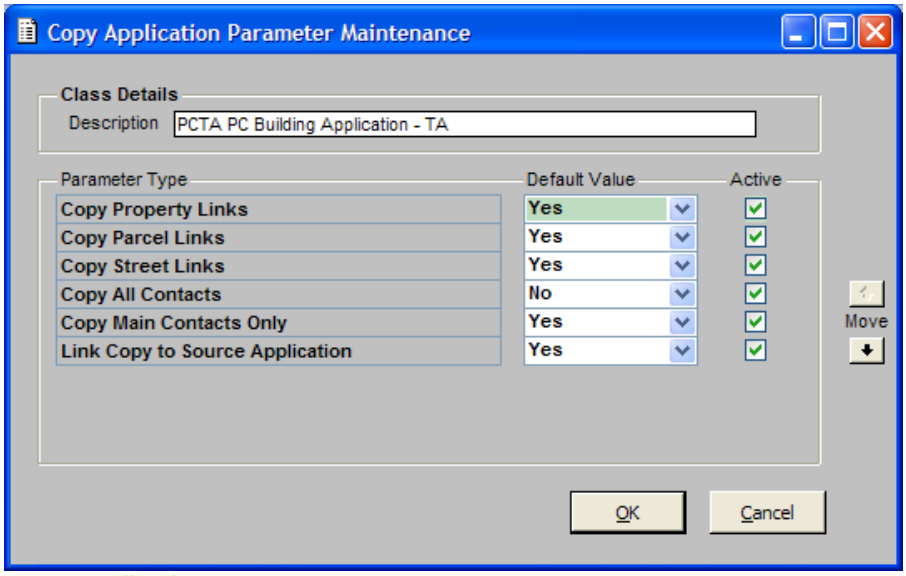
Contribution Fee Details - Description
This field displays a description of the Application Fee selected.

Options - Deposit Accounts
Selection of this button displays the Overriding Fee Deposit Accounts Maintenance form.

Options - Deposit Retained Accounts
Selection of this button displays the Overriding Fee Deposit Retained Accounts Maintenance form.

Copy Application Parameters

This form allows Council the option to allow the facility to copy various Links and Contacts when lodging an application which is based on a previously lodged application.



Copy Application Parameters Form

Class Details

This is the description of the Class that these parameters will affect.

Parameter Types

A default setting may be chosen for each of the following:

Copy Property Links – Copies all Properties that are linked to the source application to the target application.

Copy Parcel Links – Copies all Parcels that are linked to the source application to the target application.

Copy Street Links - Copies all Streets that are linked to the source application to the target application.

Copy All Contacts – Copies all entered Contacts that are linked to the source application to the target application.

Copy Main Contacts Only – Copy only the Main Contacts (applicant(s)) that are linked to the source application to the target application.

Link Copy to Source Application – Create a related application link between the source and target application.

There are three default Values that are able to be chosen they are :

Yes
No
(Not Set)

Active

If the active flag is set ON this function is in place and will affect the copy process.

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

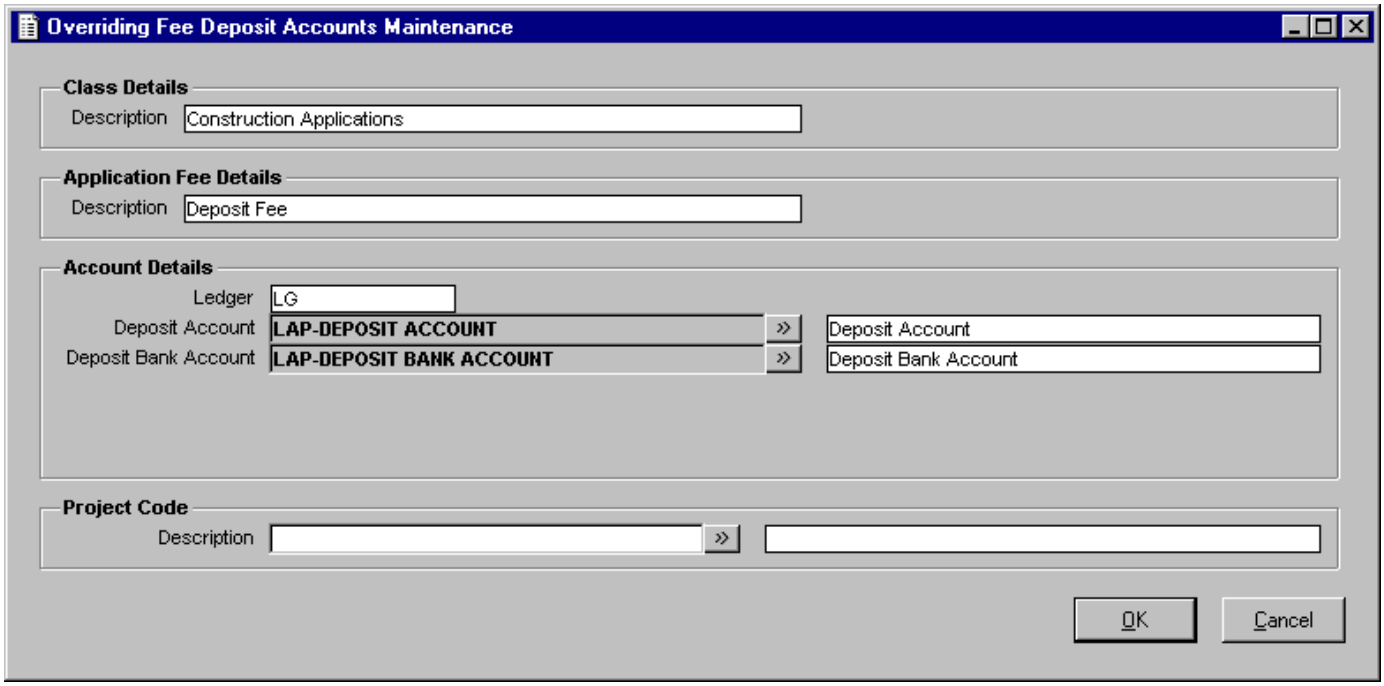
New Allocations

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 Application Fee Accounts, if they are used they override the standard Fee Accounts.



Overriding Fee Deposit Accounts Maintenance Form

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

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

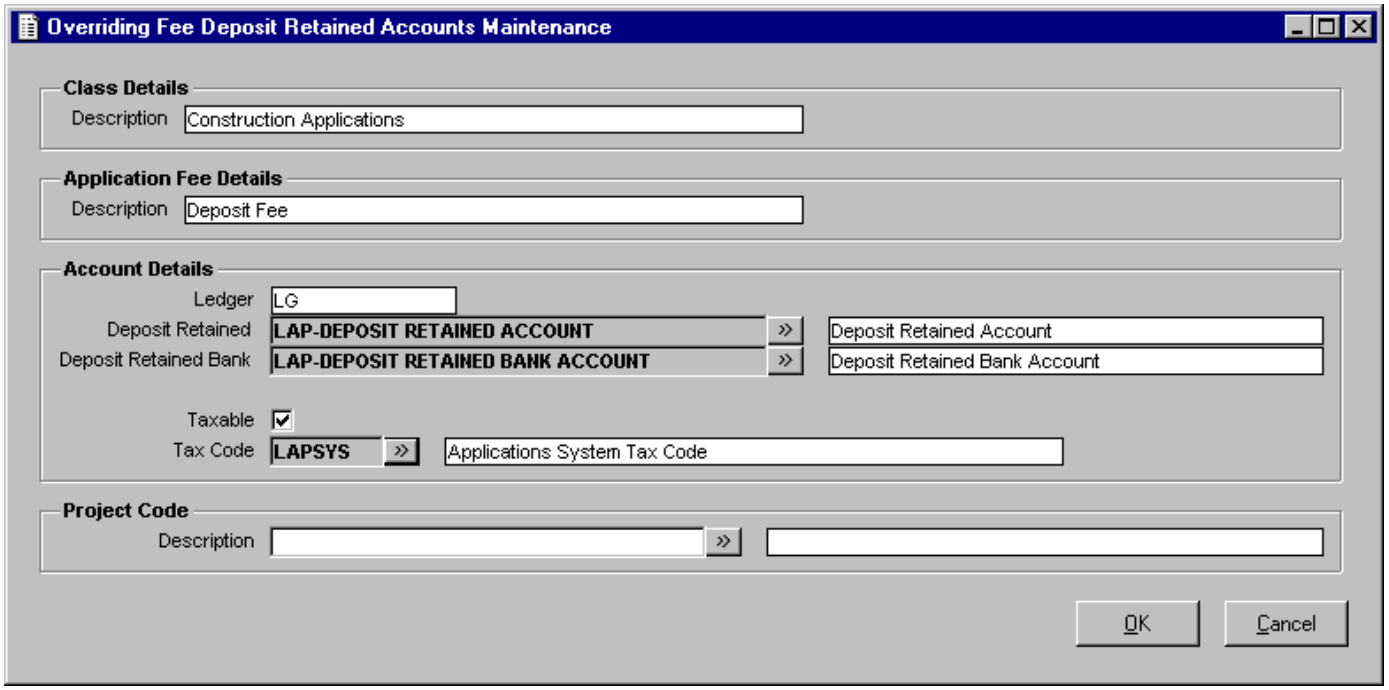
Deposit Bank Account
The Account Code can be entered if known, or the Pop Up Button can be used to select from a predefined list.
To see how these Accounts are treated during a transaction see the 93 section overview.

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 Fee Accounts, if they are used they override the standard Fee Accounts.



Overriding Fee Deposit Retained Accounts Maintenance Form

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

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

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

Account Details

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

Deposit Retained 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 a transaction see the 93 section overview.

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

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 Code

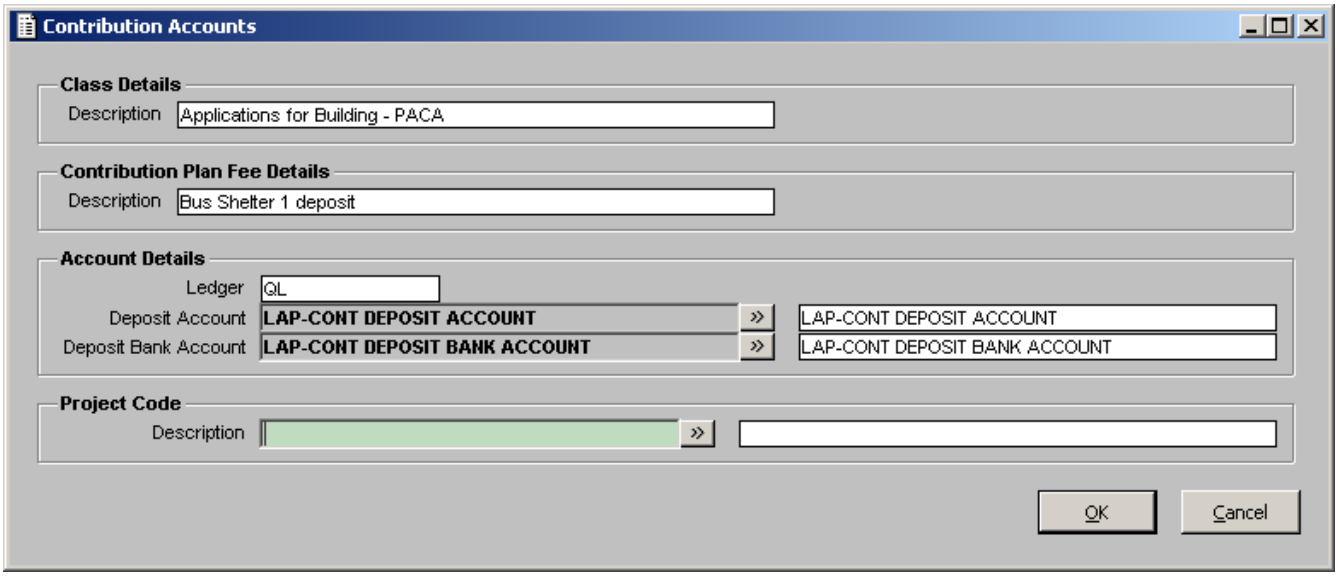
These fields are used to enter the Account Number that the Fee will have the Tax entered against. The Account Code can be entered if known, or the Pop Up Button can be used to select from a predefined list.

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.

Contribution Deposit Accounts Form

The Contribution Deposit Accounts Maintenance Form is designed to allow Specific Accounts for a particular Fee to be entered. These Accounts are stored separately from Application Fee Accounts, if they are used they override the standard Fee Accounts.



Contribution Deposit Accounts Form

Class Details - Description

This field details the Application Class selected.

Contribution Plan Fee Details - Description

This field displays a description of the Contribution 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.

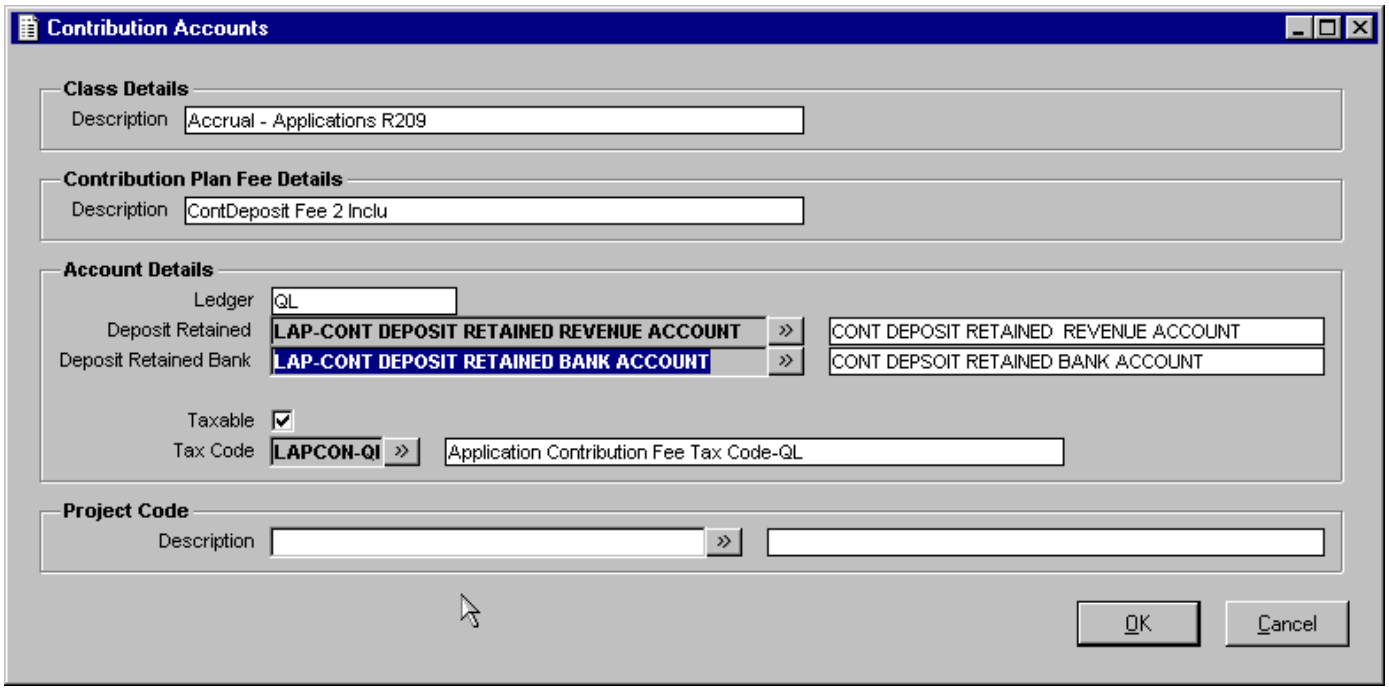
To see how these Accounts are treated during a transaction see the 93 section overview.

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.

Contribution Deposit Retained Accounts Form

The Contribution 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 Fee Accounts, if they are used they override the standard Fee Accounts.



Contribution Deposit Retained Accounts Form

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

Contribution Plan Fee Details - Description
This field displays a description of the Application Fee selected.

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

Account Details

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

Deposit Retained 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 a transaction see the 93 section overview.

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

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 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.

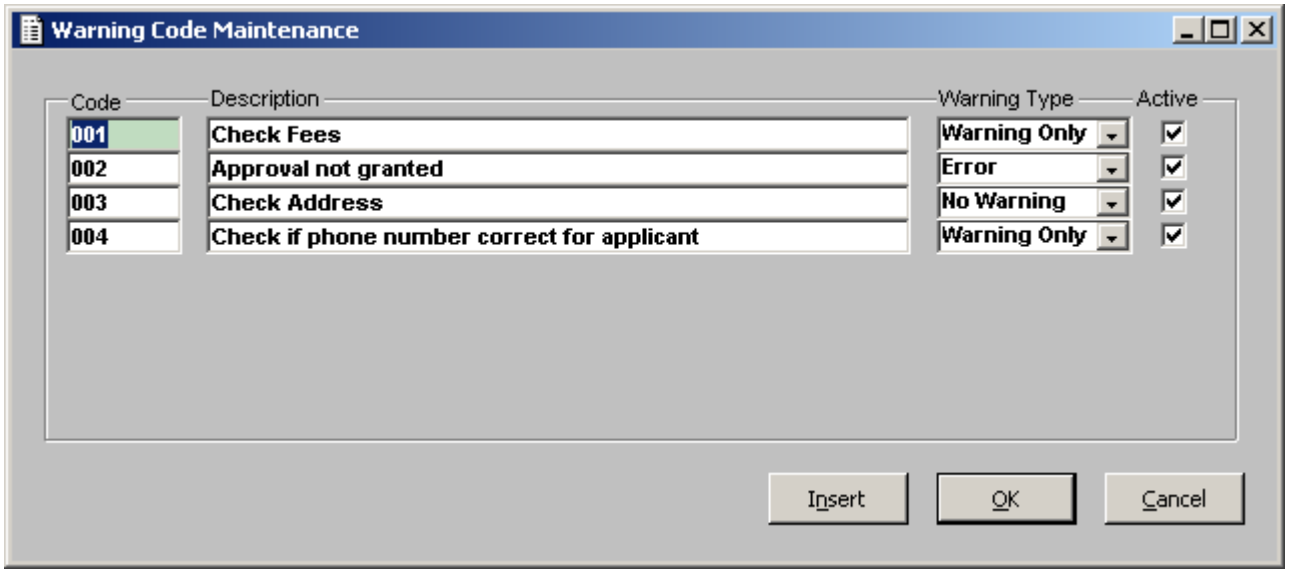
Project Code

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.

Cashier Warning

Cashier Warning Codes are predefined in the Application Parameters. Once defined they may be selected and placed against the Application the User is currently working on.
For more details on Cashier Warnings, please refer to the Receipting User Guide.

Warning Code Maintenance Form



Decisions

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

This parameter allows for Decision types and descriptions to be created. Each Decision parameter is defined as to whether it is an Approval or Rejection Decision or neither.

Each Decision Code created must also have nominated whether it is to apply to Consents only, Applications only or both Applications and Consents. You may also nominate to automatically change the Status of the Application at the time of applying the Decision.

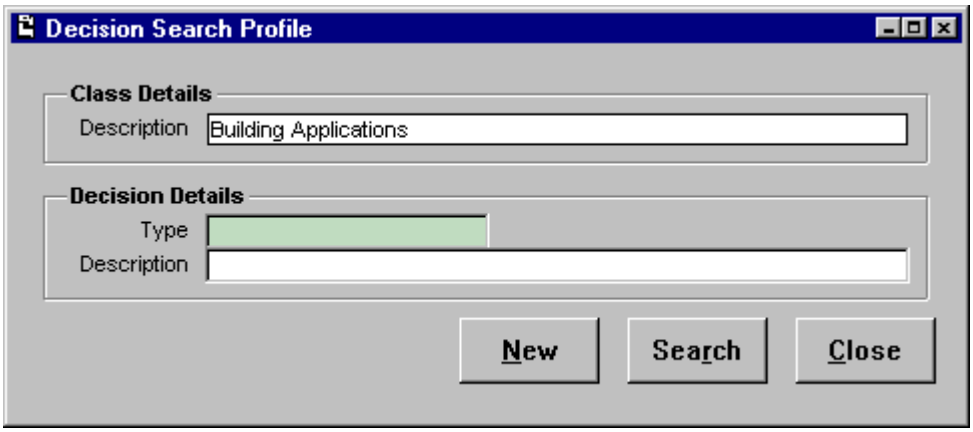
The Decision Number that is generated is established in the System Parameter.

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 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 application in which you are working.
This field is display only and may not be maintained.

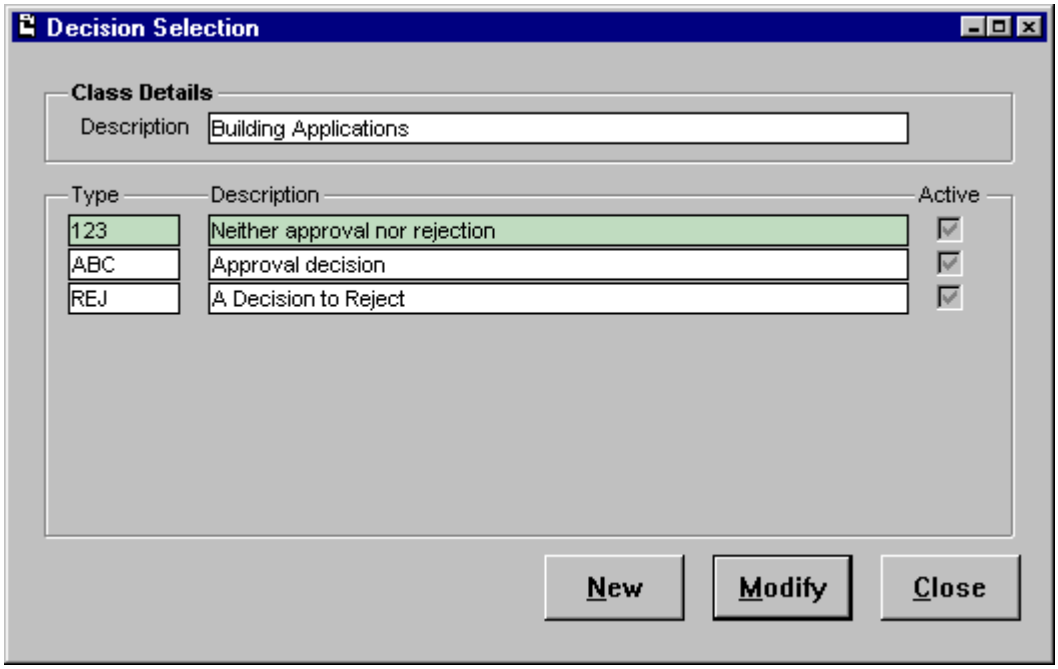
Type
Enter a Decision Type (or part thereof) if your search is to be based on a Decision Type.
Leaving this field blank will search over all Decision types.

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 application 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.

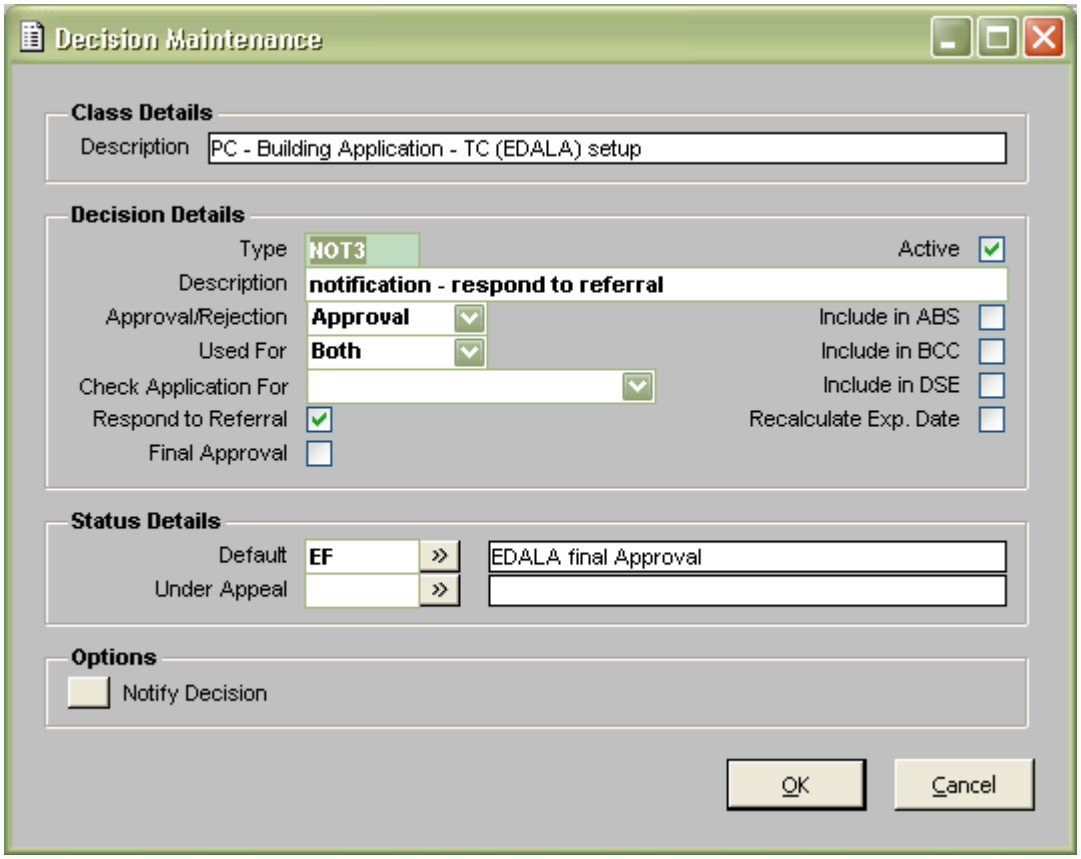
Description
This field contains the description of the Decision Type.
This field is display only and may not be maintained.

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.

NOTE: - Where EDALA has been flagged on for the Application Class then the additional fields of 'Respond to Referral' and 'Final Approval' are displayed along with the Option of 'Notify Decision'. These fields will not display if EDALA is not flagged on for the Application Class.



Decision Maintenance Form

Class Details
This field contains the description of the Class of application 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 applications with this Decision type will remain as entered. The Decision type will no longer be available for addition to applications.

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 an application or a consent then expiry date calculation can automatically take place.
Decision Types may also be established that are neither for an official Approval or Rejection ie. Interim Approval.
This field is mandatory.

Include in ABS
This field is used to identify the Decision that is to be used to include the Application on the ABS Extract.

Include in BCC
This field is used to identify the Decision that is to be used to include the Application on the BCC Extract.

Include in PPARS
This field is used to identify the Decision that is to be used to determine that the Application has a final outcome. This is used for the PPARS Extract process. An Appliction is included in the extrct file for the first time in the month of Lodgement and again each month until the Decision has been applied as determined by this flag.

Used For
This field determines whether this Decision Type may be applied at the Application level, Consent level or both levels.
Three options are available from the drop down list.

- Applications
- Consents
- Both

If “Applications” is selected then this Decision Type will only be available via the Application 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 Application Decision and the Consent Decision maintenance forms.
This field is mandatory.

Check Application For
The Check Application For field can be used to force the checking of an Application for Incomplete Workflow Tasks or Suspended Tasks before allowing this particular Decision to be added to an Application. 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 Application For flag to Incomplete Tasks.

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

If this field is set when this Decision is added to an Application 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.

Respond to Referral
When the Respond to Referral is flagged on then when this Decision Type it added to an Application it will set the Application so that it will be extracted for the EDALA Export process as part of the Respond to Referral XML file.

NOTE: - This field will only display where EDALA has been flagged on for the Application Class. Additionally it will only shown on Applications that have been created via the EDALA Take Up process. Applications lodged via the normal Lodgment menu will not display any EDALA information.

Final Approval
When the Final Approval is flagged on then when this Decision Type it added to an Application it will set the Application so that it will be extracted for the EDALA Export process as part of the Final Approval XML file.

The Final Approval flag is also 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 an Application and therefore determining if that Application can then be Update via the Bulk Responsible Officer Reassignment. It is not used by any other process within Licensing.

NOTE: - This field will only shown on Applications that have been created via the EDALA Take Up process. Applications lodged via the normal Lodgment menu will not display any EDALA information.

Recalculate Exp. Date

The Recalculate Expiry Date flag is used to determine the default value for the field in the Decision Maintenance function. Every time Decision Maintenance is entered, it will default the Recalculate Expiry Date flag to the value held on the Decision Type. This can be overridden at the time of entering the Decision on the Application.

Status Details - Default

This field contains the application status code that will be applied to an application when this Decision Type is applied to an Application 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 Application will automatically be updated with this code when the Decision Type is used.

Status Details – Under Appeal

This field contains the Under Appeal status code that will be applied to an application when this Decision Type is applied to an Application and the Under Appeal flag is checked 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 Application will automatically be updated with this code when the Decision Type used is flagged as 'Under Appeal'.

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

Options – Notify Decision

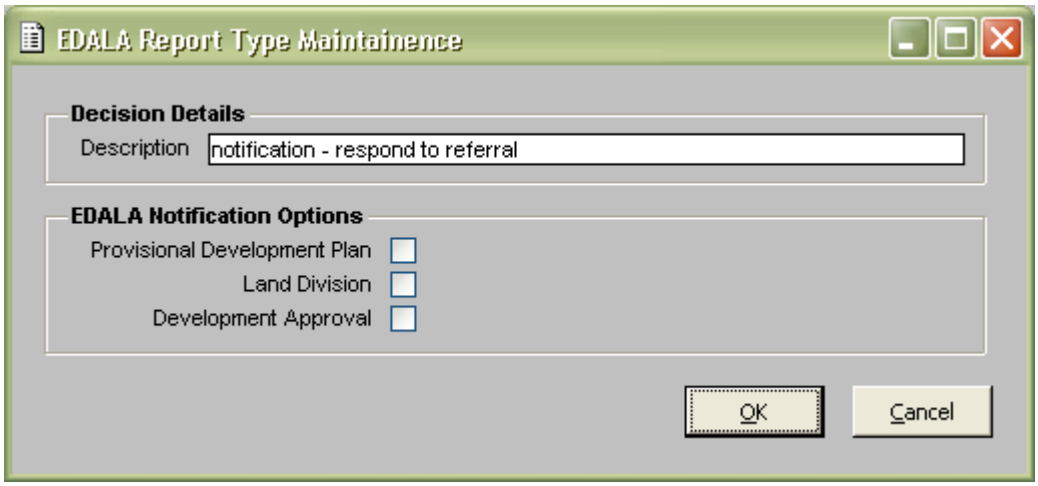
The Option – Notify Decision displays the EDALA Notification Maintenance form and allws for further conditionas to be set up for the export of EDALA information.

NOTE: - The Notify Decision Option will only display where EDALA has been flagged on for the Application Class.

EDALA Report Type Maintenance Form

This form is used to maintain additional information to be used for the export of EDALA information. There are three different types of ' Notify Decision' and the EDALA Notification Maintenance form can assigne the type so that the Decision is extracted correctly when the EDALA export is run.

NOTE: - This display is only available where EDALA has been flagged on for the Application Class. . Additionally it will only shown on Applications that have been created via the EDALA Take Up process. Applications lodged via the normal Lodgment menu will not display any EDALA information.



EDALA Report Type Maintenance Form

Decision Details - Description

This field contains the description of the Decision to which you are assigning the Notification Options.

EDALA Notification Options – Provisional Development Plan
Flag this field on if it is required to be added to the Application at the time the Decision is added. This field can be left blank.

EDALA Notification Options – Land Division
Flag this field on if it is required to be added to the Application at the time the Decision is added. This field can be left blank.

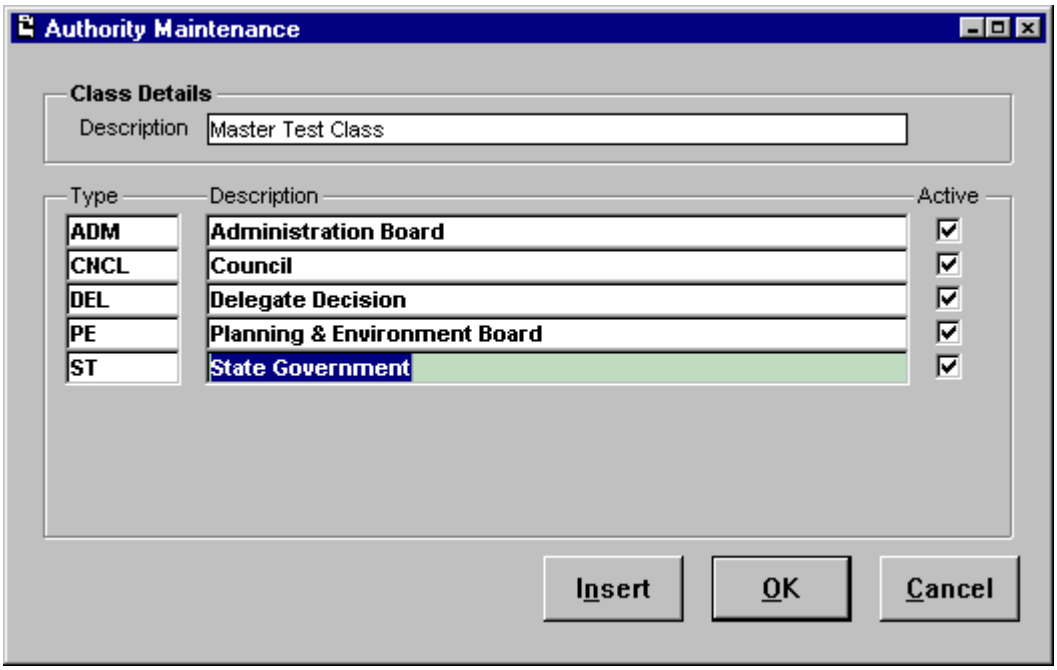
EDALA Notification Options – Development Approval
Flag this field on if it is required to be added to the Application at the time the Decision is added. This field can be left blank.

Authority

This parameter is used to describe the Authority that either Approved or Rejected an Application.

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 Application 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.

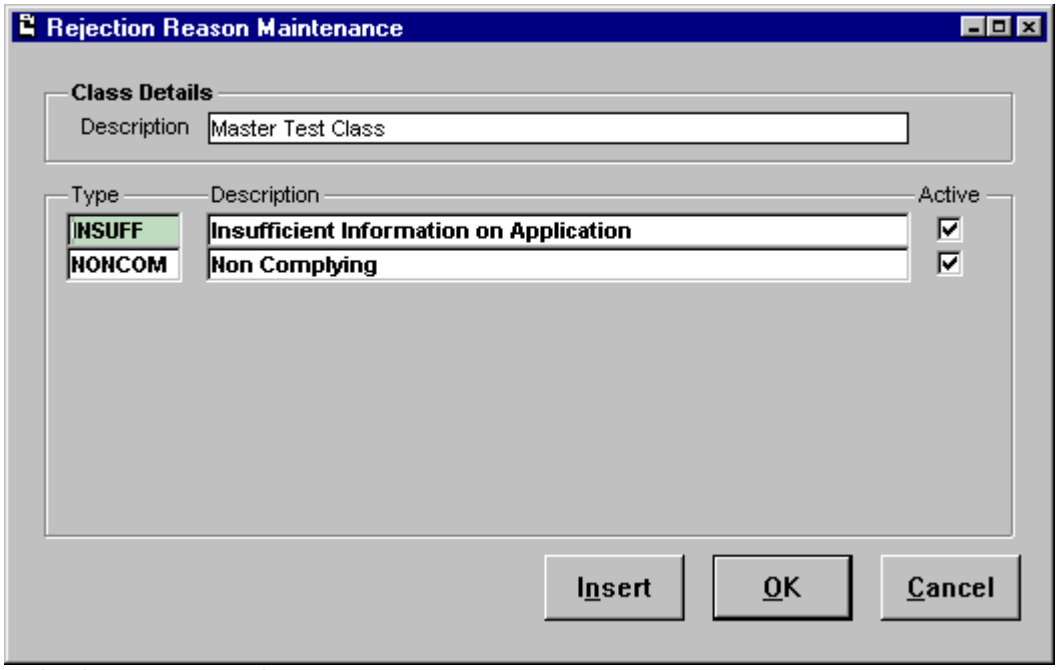
Active
If this box is checked on then the Authority type is available to the system.
If this box is checked off then the Authority type is no longer available to the system. Any existing Applications with this Authority type will remain as entered. The Authority type will no longer be available for addition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

Rejection Reason

This parameter is used to assign Rejection Reason descriptions to a Decision record that is of a “Rejected” type.
It is used to describe reasons why an application was rejected. eg. Non compliance

Rejection Reason Maintenance Form

This form is used to create and maintain Rejection Reason Codes and their descriptions.



Rejection Reason Maintenance Form

Class Details
This field contains the description of the Class of Application 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.

Consent

This parameter is required if you wish to use Consent processing.
An unlimited number of Consents may be applied to an Application. Each Consent is subsequently assigned a Decision type.

Consent Group
This parameter is optional in respect to the use of Consent processing. This parameter is used to group various Consent Types together for reporting purposes. For example all Consent Types relating to Building may be grouped together under a single Consent Group of Building.

Consents
This parameter allows for the establishment of various Consent Types and their descriptions (South Australia requirement only).

Responsibilities are also assigned at each Consent Type. Depending on the Responsibility Structure used, each Consent Type may be allocated to a specific responsibility group.

It should be noted that where Processing Groups are used, the Responsible Officer may vary depending on the Processing Group assigned to the Application.

Consents can be created with a description, and if required, further details about the Nature of Consent. These codes can be used against the application to indicate what stages it must go through and be approved before the next step can proceed.

For example, an application may have Planning and Building Consent with a different Processing Group, where Planning Consent must be given before Building Approval takes place.

An example of Consent Codes used by South Australian Councils :-

Provisional Building Rules Consent - PBRC

B1	Dwellings
B2	Dwelling Additions (Major)
B3	Minor Work (Sheds, Verandahs, etc)
B4	Swimming Pools
B5	Retaining Walls
B6	Class 2 - 9 (Major Projects)

Provisional Development Plan Consent - PDPC

C1	Complying - Category 1 (does not require public notification of application)
M1	Merit - Category 1
M2	Merit - Category 2
M3	Merit - Category 3
N1	Non complying - Category 2 (requires public notification of application
N3	Non complying - Category 3 (Prohibited development - requires full public notification and invitation for comments from public)

A Consent Nature can be linked to a Consent as a further definition of a consent, for example, a Building Consent could have several Consent Natures. One nature could be ‘Domestic’ or another could be ‘Commercial’ and so on.

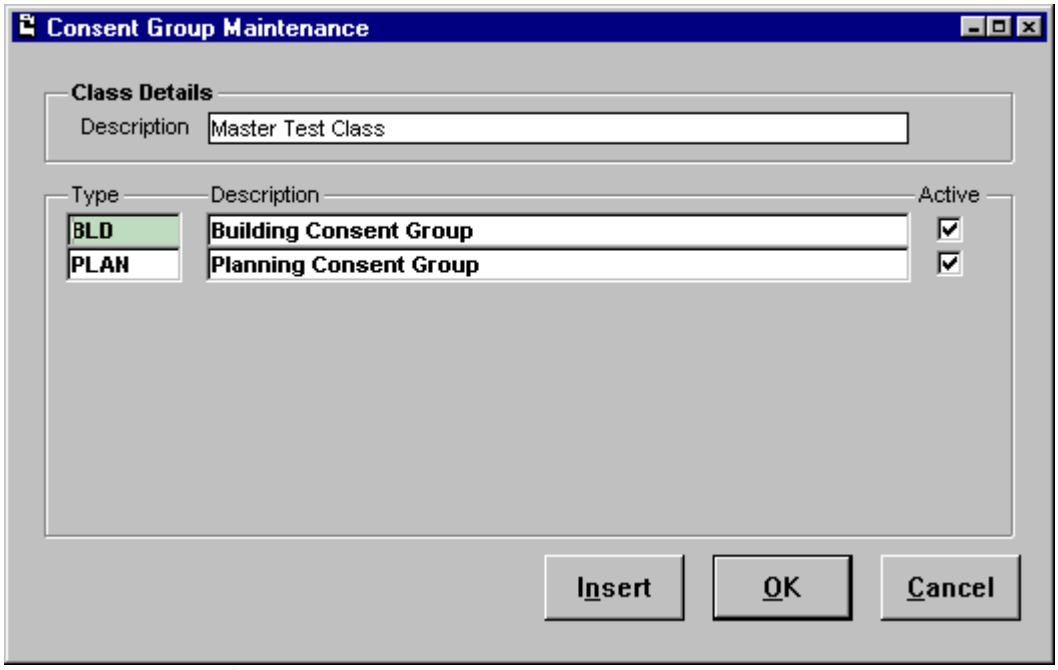
Consent Nature
This parameter is optional for Consent processing. A Consent Nature is a further definition of a Consent. For example, a Building Consent could have several natures, eg. Domestic and Commercial.

Consent Group Maintenance Form

This form allows for the creation and maintenance of Consent Groups.

A Consent Group is used for reporting purposes only and is optional to the system.

A Consent Group allows individual Consent Types to be allocated to a Consent Group.



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.

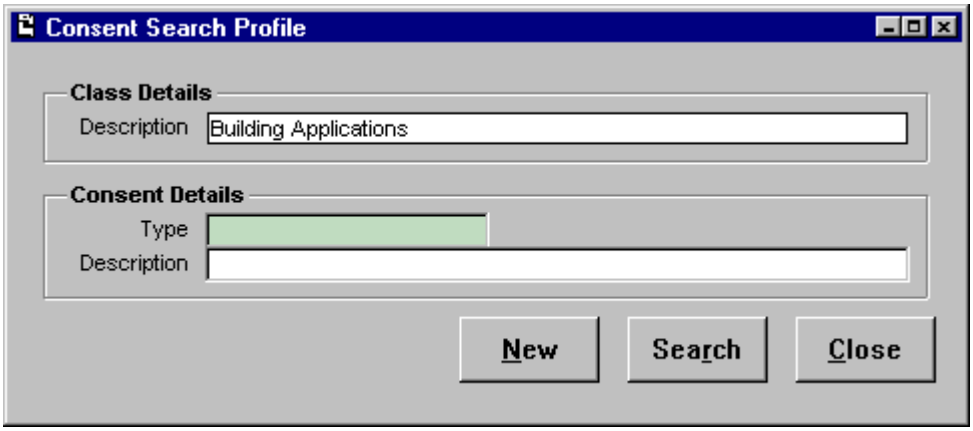
Active
If this box is checked on then the Consent Group is available to the system.

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.

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 a search press the Search Button.



Consent Search Profile Form

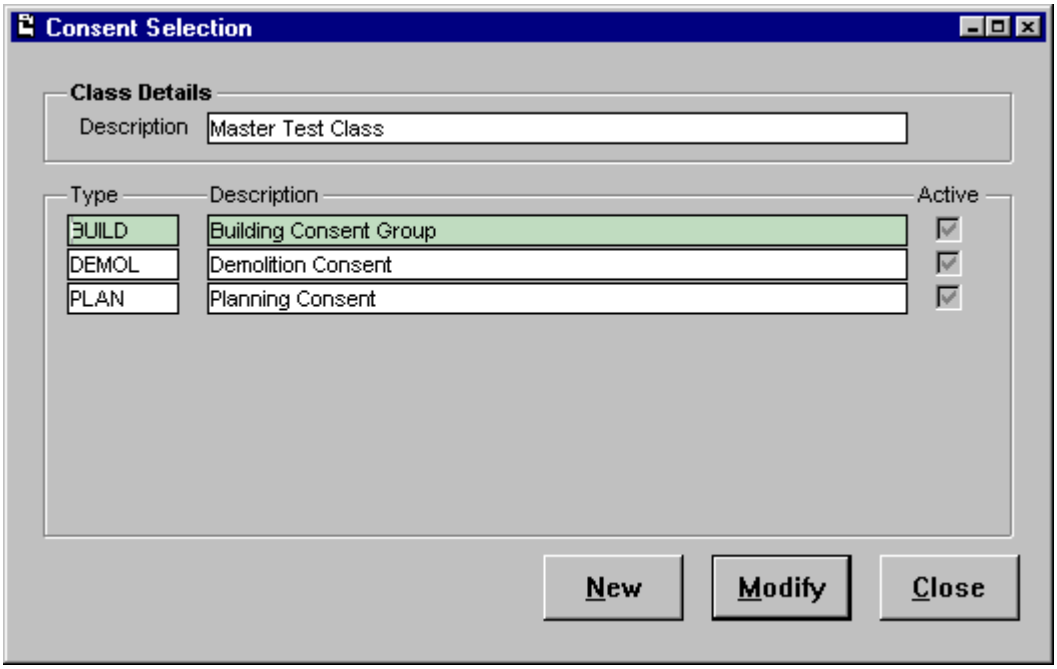
Class Details
This field contains the description of the Class of Application in which you are currently working.
This field is display only and may not be maintained.

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 Application 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.

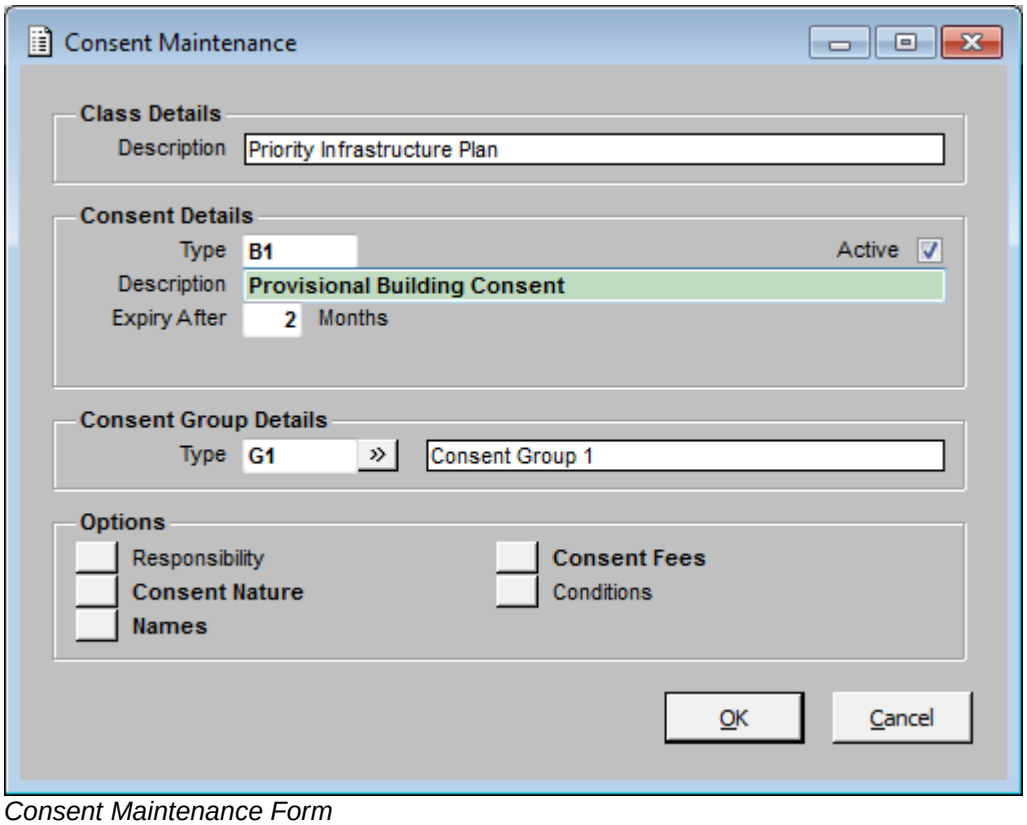
If this box is checked on then the consent record is active.
If this box is checked off then the consent record is not active.

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 Application Maintenance, in Application Entry, Change Application Type or inserting a new Fee, the assigned Condition will be loaded onto the Application. 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 Application 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 Applications with this Consent type will remain as entered. The Consent type will no longer be available for addition to Applications.

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 approval date plus the value in this field will update the expiry date of the Consent.

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.

Options - Responsibility

Pressing this button will display the Assign Responsibility Maintenance form, which allows you to override the Group Code by Processing Group.

If Processing Groups are used and an Application is lodged for that Processing Group then the Group Code assigned to the Consent may be overridden at that Processing Group level.

This feature is optional.

Options - Consent Nature

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

Options - Consent Fees

Pressing this button will display the Consent Fees Maintenance form.
This allows Fees to be assigned to the Consent so that when the Consent is added to the Application a Fee will be added as well.

Conditions Option

Pressing this button will display the Condition Maintenance form.

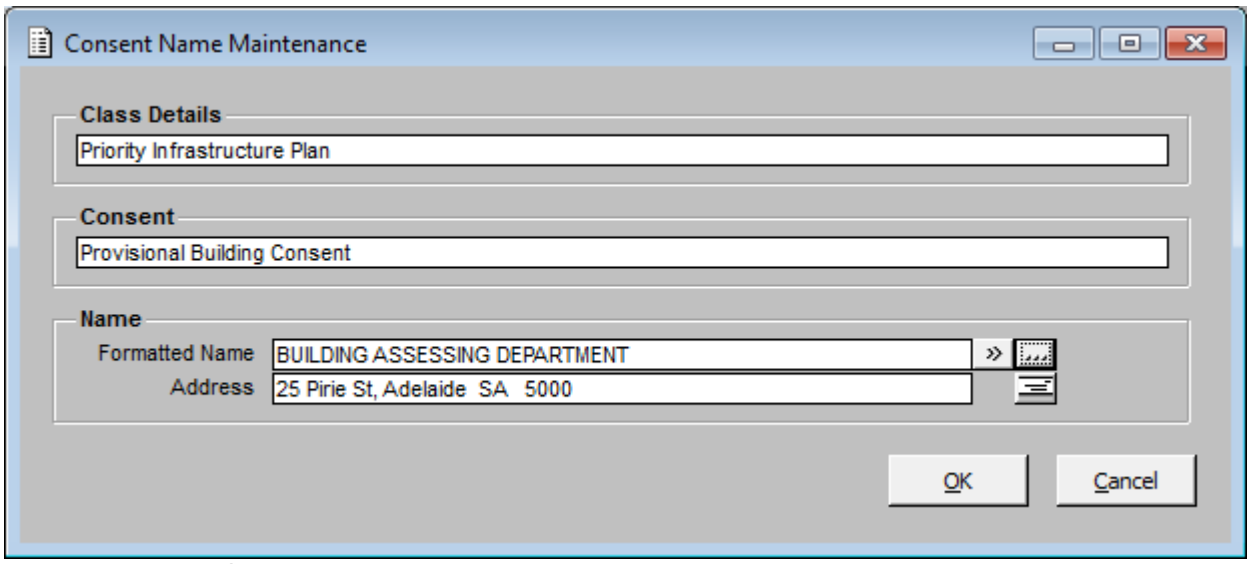
NOTE: - When these Consents are used in Application Maintenance, in Application Entry, Change Application Type or inserting a new Fee, the assigned Condition will be loaded onto the Application. The system will check for existing Standard Conditions and these Consent Conditions will only be loaded once 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.

Options – Names

Clicking this option will present the user with the Consent Name Maintenance form.

Consent Name Maintenance Form

This form will allow the user to select a name to be used when Sending letters via the Consent Maintenance Option.
This name is not mandatory.



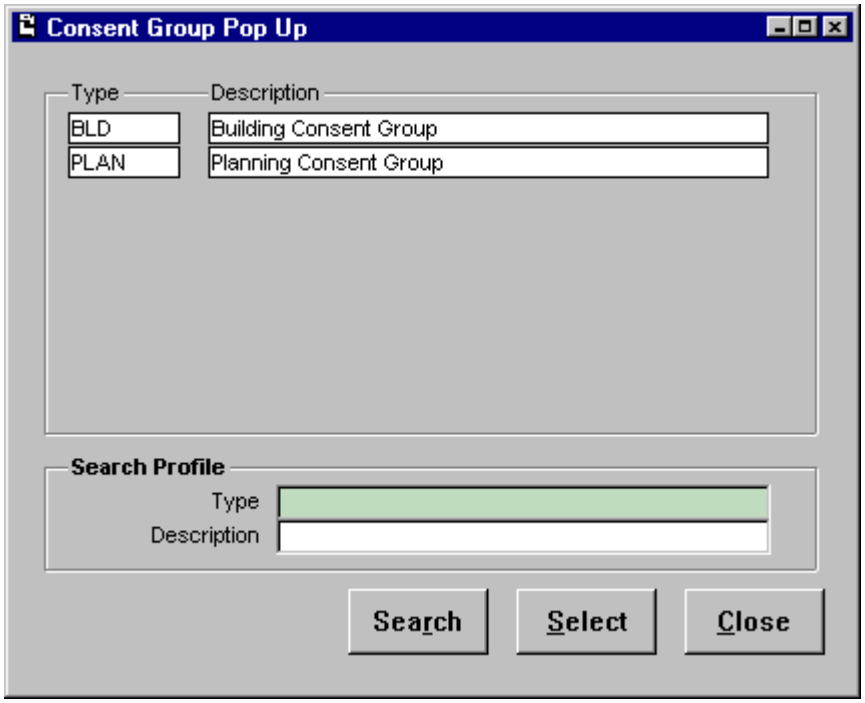
Consent Name Maintenance Form

Format Name

This field displays the name linked to the consent.
Clicking the Popup button will take the user to Name and Address to select a Name to be linked.
Clicking the Detail button will take the user to the Name details form.

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.

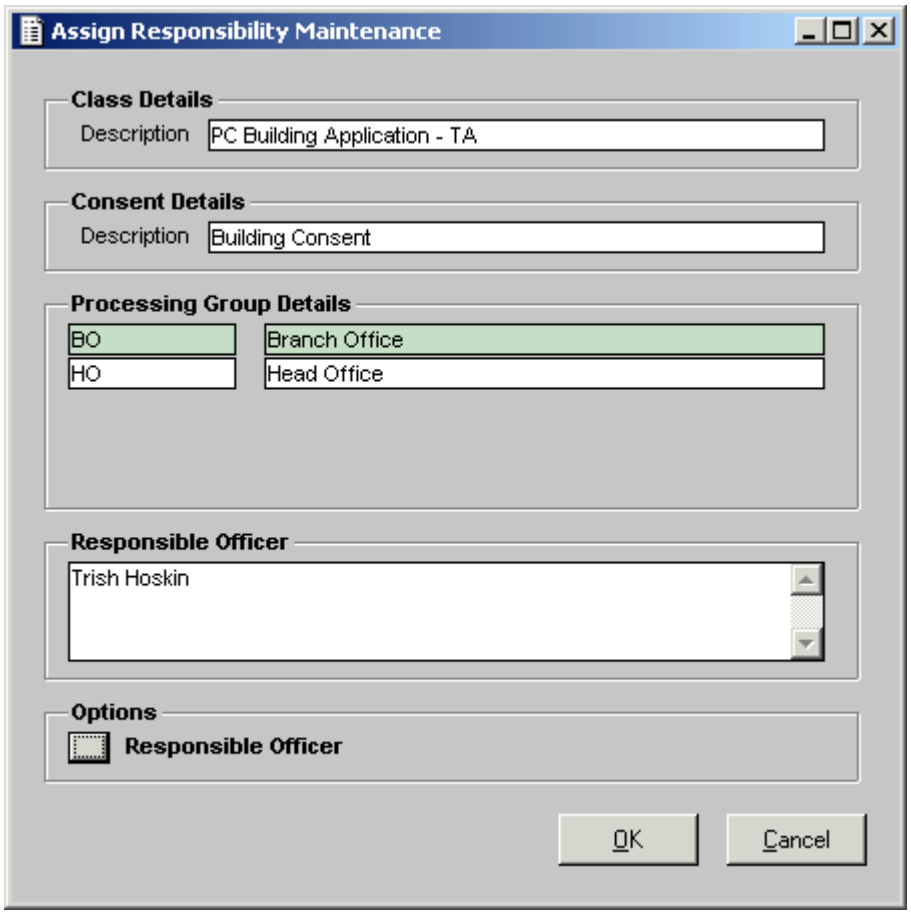
Search Profile - Type

Enter a Consent Group Type (or part thereof) on which to base your search. Use the Search button to initiate the search.
Wildcard 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.
Wildcard 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 Processing Group level.
If no overrides are entered then the Responsible Officers at the Consent Type level remains in force.



Assign Responsibility Maintenance Form

Class Details
This field contains the description of the Class of Application 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.

Processing Group Details

This field contains the description of the Processing Group to which you may assign an alternative Responsible Officers.

If this Processing Group 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
The Responsible Officer (s) that are assigned to the Processing Group are shown in this field.

Options – Responsible Officer
If Responsible Officers have been assigned then the Option is bolded. Responsible Officers can be maintained via this option for the nominated Processing Group.

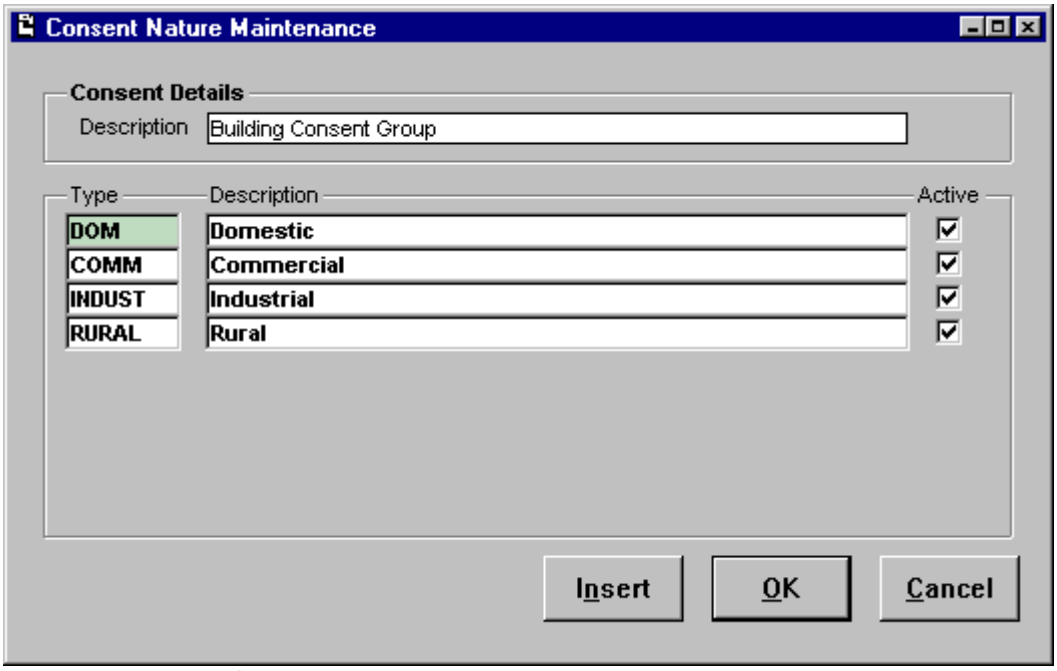
Consent Nature Maintenance Form

This form allows you to create and maintain Consent Nature types.

When Consent records are attached to an Application 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.

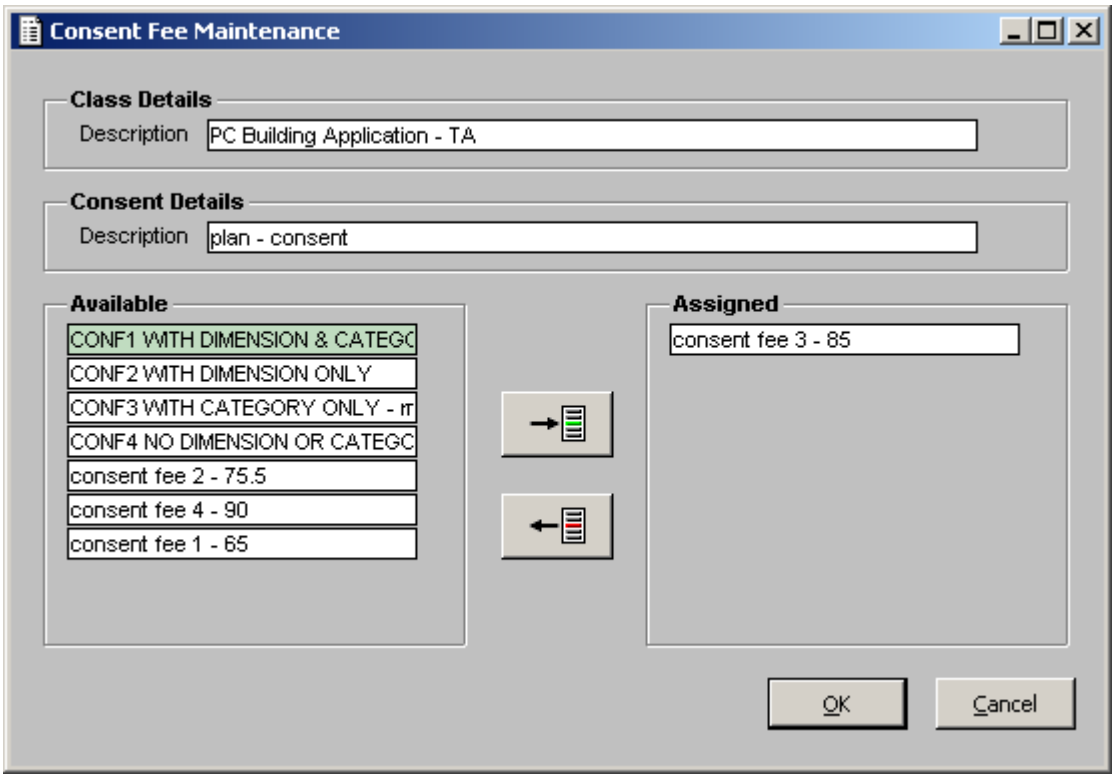
Description
This field contains the description required for the Consent Nature record.
This field is mandatory.

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

This form allows you to assign Fees to the Consent so that when the Consent is loaded onto the Application then the assigned Fee for the Consent will also be added to the Application.



Consent Fee Maintenance Form

Class Details - Description
This field contains the description of the Class of Application 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 Fees.
This field is display only and may not be maintained.

Available
The Available area displays the Fees that can be used by the Consent. Move the required Fees from this list to the Assigned list.

Assigned
The Assigned area displays the Fees that have been assigned to the Consent. These fees will be added to the Application when the Consent is added to the Application.

Building Classifications

This parameter establishes the regulatory Building Classification codes and descriptions.
The Building Classification Codes can then be used at the Building Data level of the Application Lodgement or Application Maintenance option and in turn, be used for Statistical or Reporting purposes.

Some examples of Building Classes may be as follows:

Class 1	Class 1 - Dwelling - Single Storey Detached Dwelling
Class 1A	Class 1A - Dwelling - Single Storey Attached Dwelling
Class 1AA	Class 1 - Single Storey Detached Dwelling Additions, etc

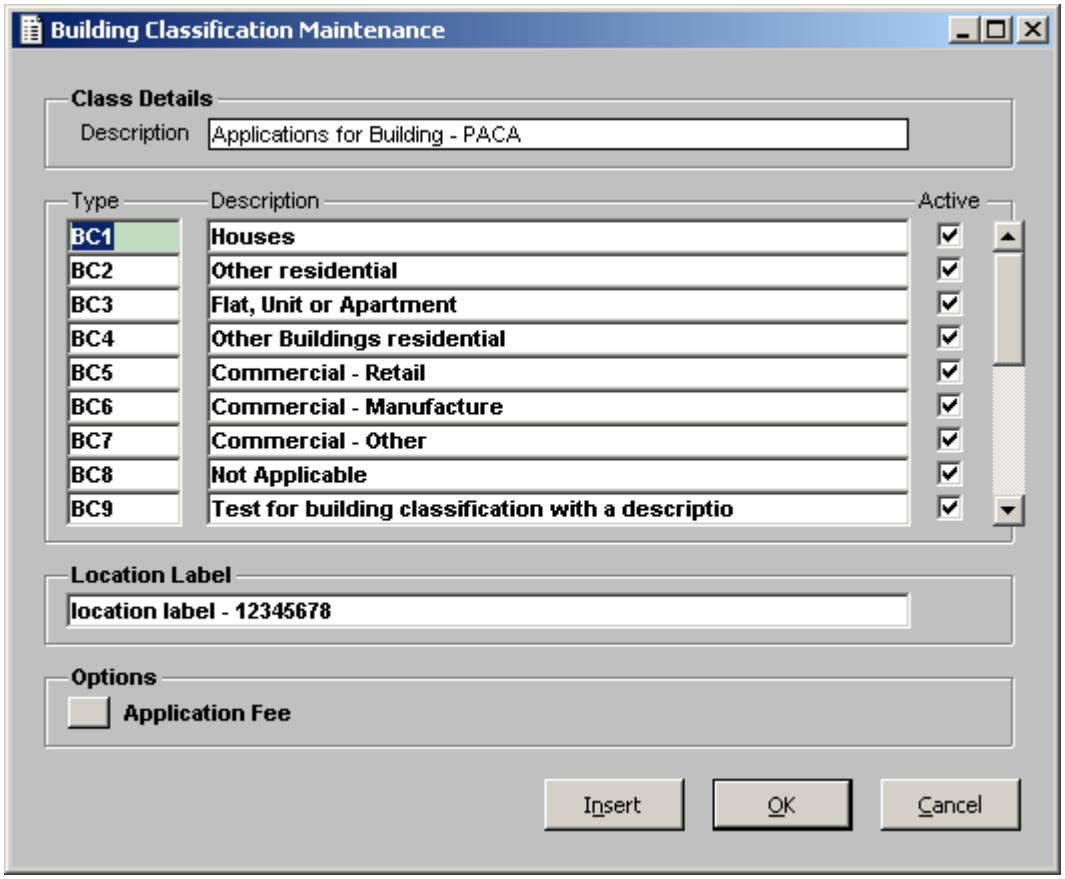
Where required, fees may be associated with the Building Classification. In that case, when the Building Classification is recorded on an Application the appropriate fees are calculated.

This feature is optional.

Building Classification Maintenance Form

This form allows you to create and maintain Building Classification parameters.

From this form you may also call the Fees Maintenance function to assign Fee Codes to individual Building Classifications.



Building Classification Maintenance Form

Class Details

This field contains the description of the Class of Application to which you are assigning Building Classification types.
This field is display only and may not be maintained.

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

Description
This field contains the full description of the Building Classification.
This field is mandatory.

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

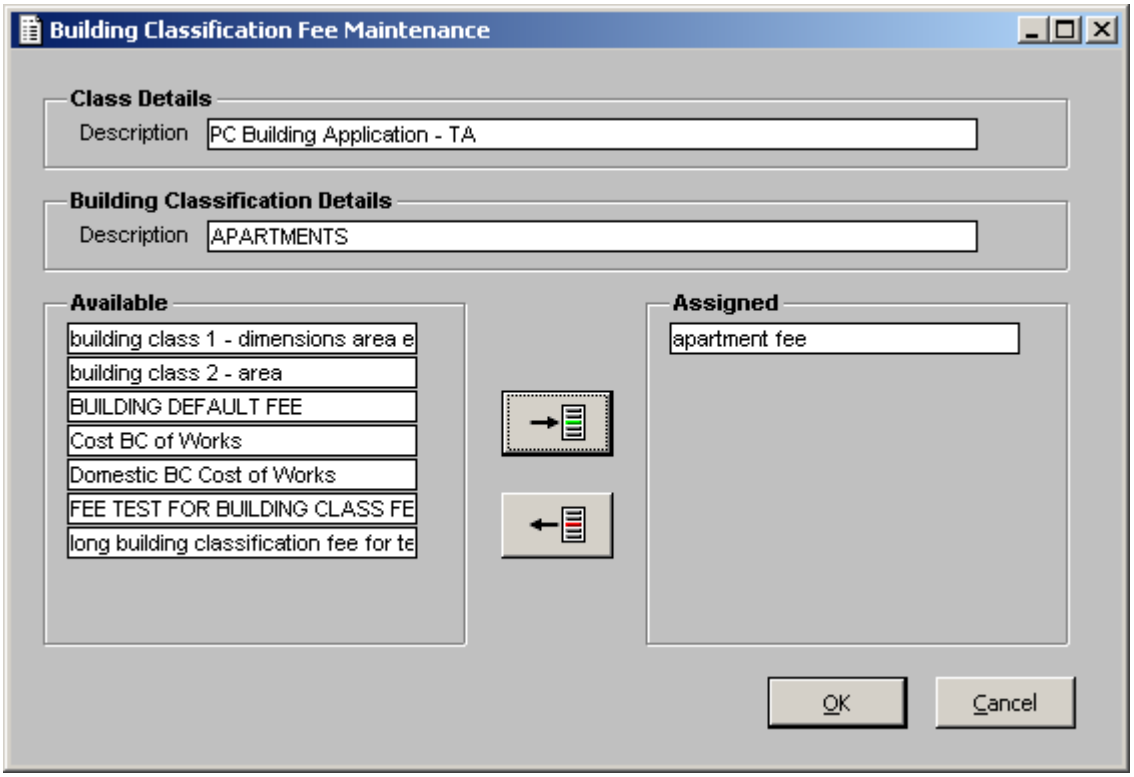
If this box is checked off then the Building Classification type is no longer available to the system. Any existing Applications with this Building Classification type will remain as entered. The Building Classification type will no longer be available for addition to Applications.

Location Label
The Location Label allows the entry of a Label to be used within the Building Classification maintenance on an Application. This is not a mandatory field.

Options - Application Fee
Pressing this button will present the Fees Maintenance Form.
Only fees entered as Building Classification Type Fees are available for use. This feature is optional.

Building Classification Fee Maintenance Form

This form allows you to assign Fees to the Building Classification. Only Fees that have been defined under the Building Classification Fees are available for selection on this form.



Building Classification Fee Maintenance Form

Class Details - Description

This field contains the description of the Class of Application to which you are assigning Fees to the Building Classification type.

This field is display only and may not be maintained.

Building Classification Type - Description
This field contains the Building Classification description which Fees are being applied to.

This field is display only and my not be maintained

Available
The Fees that are available to be assigned to the Building Classification are listed in the Available Area.

Assigned
Fees that have been assigned to the Building Classification are listed in the Assigned Area.

Building Materials

Where applications are to be recorded on the Australian Bureau of Statistics Return or Council or other organisations require certain statistical information, then the Materials Parameter should be established. The Materials Codes option is available in Building Data primarily to record the type of Materials used in the construction of any Building Work.
The Code and Description are User Definable, however, they should fall in line with those specified by the ABS/BCC. A specific ABS/BCC code must be nominated against each Material Type.
Material Type and Description are as follow;

10	Tiles
11	Brick, double
12	Brick Veneer
20	Concrete, stone or slate
30	Fibre cement
40	Timber
50	Curtain glass
60	Steel
70	Aluminium
80	Other (block, cavity brick).
90	Not Specified

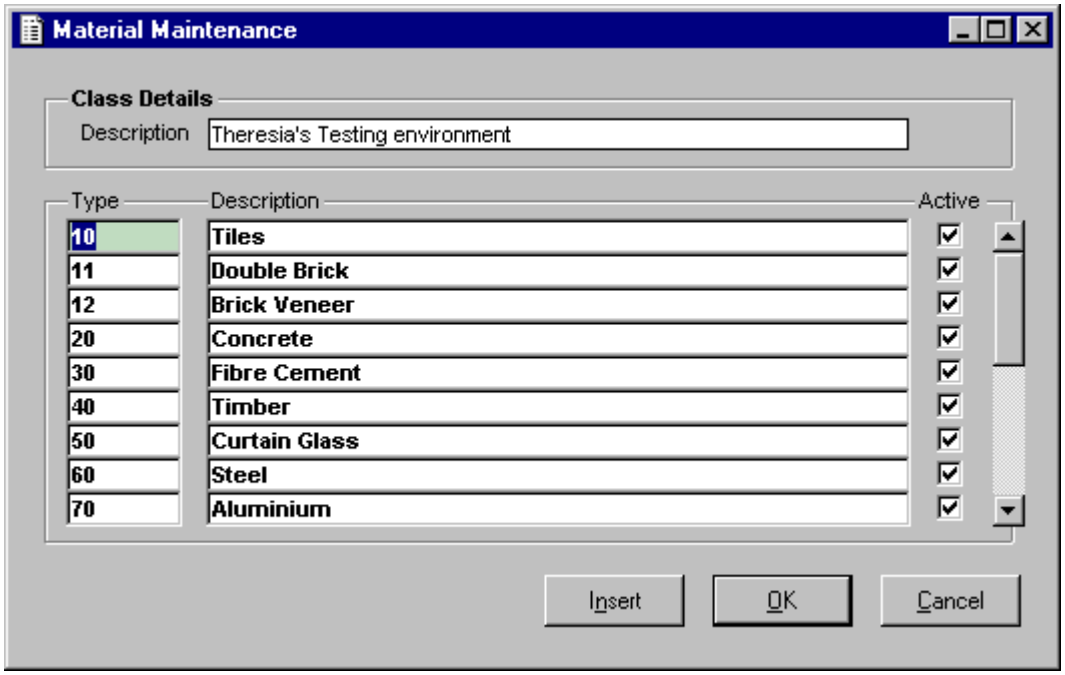
Once the Material Types have been established, they are then assigned to Building Components (Walls, Roof, Floor, etc).

This parameter is used to determine all building materials that will be available to the Application Class.

Building Materials will be reported on the Australia Bureau of Statistics (ABS) return and are mandatory for all new building Applications.

Materials Maintenance Form

This form allows for the creation and maintenance of Material Types.



Materials Maintenance Form

Class Details

This field contains the description of the Class of application to which you are assigning Material Types.
This field is display only and may not be maintained.

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

Description
This field contains the description of the Material.
This field is mandatory.

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

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

Building Components

Where applications are to be recorded on the Australian Bureau of Statistics Return or Council or other organisations require certain statistical information, then the Components Parameters should be established. The Components option is available in Building Data primarily to record the type of Components and the Materials used in the construction of any Building Work.
The Code and Description are User Definable however should fall in line with those specified by the ABS (if appropriate). A specific ABS code must be nominated against each Component Type.
An example of Components would be:-

- Walls
- Floor
- Roof
- Frame

The Components are established and then the materials are assigned to each Component along with the ABS materials code.

For example the Wall component is created and then the materials assigned such as Solid Brick, Brick Veneer, etc.

Consent Natures are defined in the Consent Parameter option. When an application is being Lodged or Maintained, you can nominate the Consent Nature of the Consent being approved/refused in the Consent option.

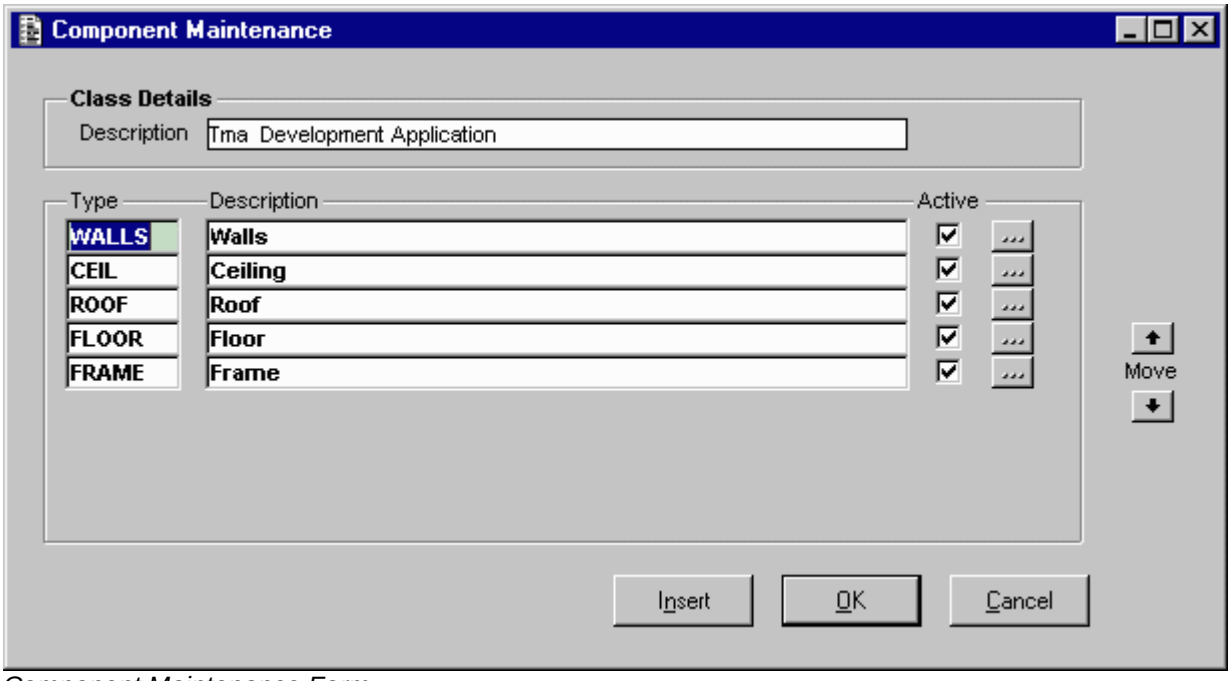
This parameter is used to describe all Building Components required for the Application Class.

The Building Component is then assigned materials appropriate to the component.

This function is required for the Australian Bureau of Statistics (ABS) return.
This feature is optional.

Component Maintenance Form

This form is used to create and maintain component records.



Component Maintenance Form

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

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

Description
This field contains the Component description.
This field is mandatory.

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

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

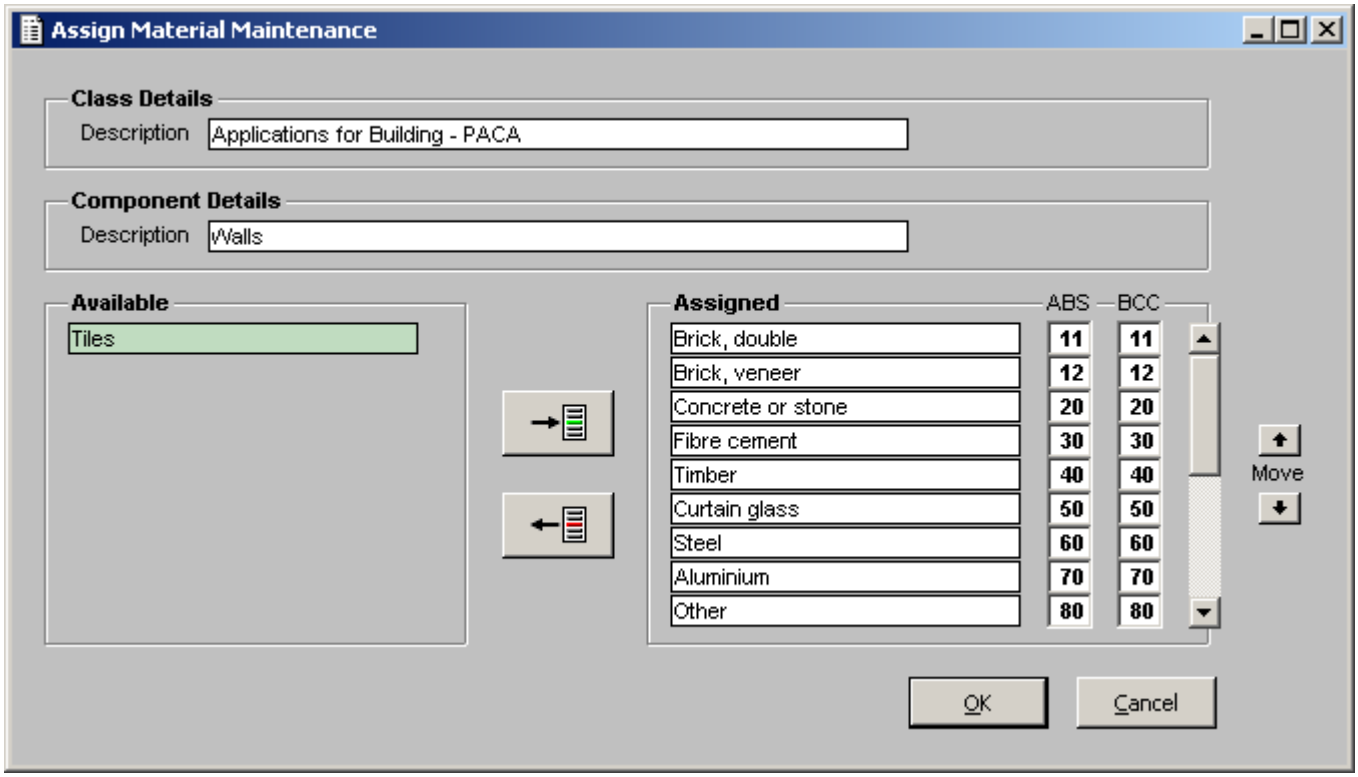
Detail Button
Pressing this button will display the Assign Materials Maintenance form. This form is used to assign the various material types to the Component type.

Move Up/Down
Pressing these buttons allows you to sequence the Component types into a logical order.
This sequence determines how the component types will be presented within the Application maintenance function.

Assign Material Maintenance Form

This form is used to assign Material types to individual Component types. An ABS and or BCC number is also assigned to the Material type. This form determines what material types are available during Application maintenance when a specified Component type is entered.

This is a Select/Remove form. Please refer to the How to Use guide for more information on the use of this form.



Assign Material Maintenance Form

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

Component Description
This field contains the description of the Component to which you are assigning materials.

Available
This list shows all available Material types that are unassigned to this Component type.

To assign one of these Material types to the Component click on the Material type and press the Select Button.
Once assigned to the Component the Material will be removed from this list to the Assigned List.

Add/Remove
Use the Add / Remove options to move Materials from the Available List to the Assigned List.
To remove a Material type from this list click on the Material type and press the Remove Button.
If the Remove Button is pressed the Material type will be removed from this list to the Available List.

Assigned
This list shows all Material types that have been assigned to this Component type.
To remove a Material type from this list click on the Material type and press the Remove Button.
If the Remove Button is pressed the Material type will be removed from this list to the Available List.

ABS Code
This field contains the Australian Bureau of Statistics code for this Material Type.
This code is required for the ABS return.
Up to two numeric characters may be entered.

BCC Code
This field contains the Building Commission code for this Material Type.
This code is required for the BCC return.
Up to two numeric characters may be entered.

Move Up/Down
Pressing these buttons allows you to sequence the assigned material types into a logical order.

The order nominated here is used for presentation of the material types to the User during Application Maintenance.

Work Types

Where applications are to be recorded on the Australian Bureau of Statistics Return or Council or other organisations require certain statistical information, then the Work Types Parameters should be established. The Code and Description are User Definable however should fall in line with those specified by the ABS/BCC (if appropriate). A specific ABS/BCC code must be nominated against each Work Type.

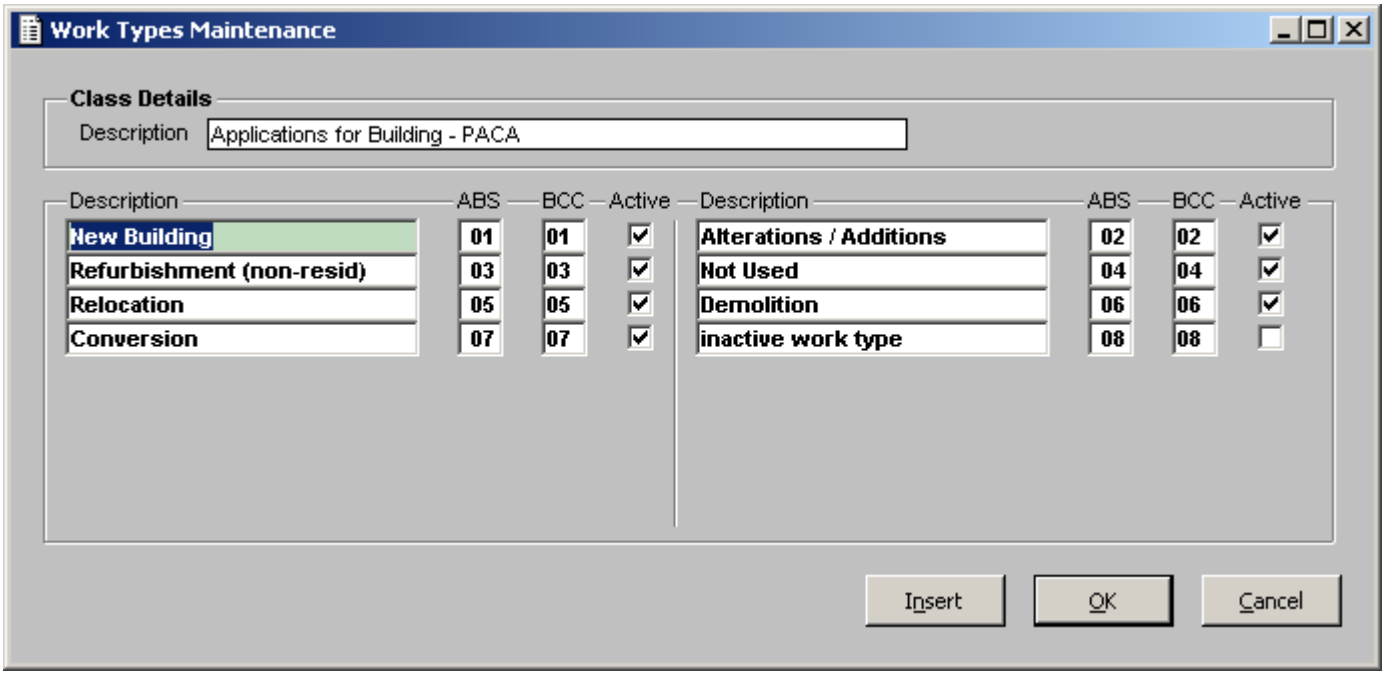
Work Types are:-

1 New building
2 Alterations and/or additions to an existing building
3 Refurbishment (a special category of A&A primarily for non-residential building)
4 Not used
5 Relocation (where a house is relocated to a new site
6 Demolition of an existing residential building, or relocation where the permit relates to the site a house is being relocated from. This value can also be used to identify demolitions of non-residential buildings, where States wish to record
7 Conversion (where a non-residential building is converted for use as a dwelling or vice-versa)

This parameter is used to establish the various Work Types required by the Australian Bureau of Statistics. This feature is optional.

Work Types Maintenance Form

This form is used to create and maintain Work Types.



Work Types Maintenance Form

Class Details

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

Description

This field contains the full description of the Work Type.

This field is mandatory.

ABS
This field contains the valid Australian Bureau of Statistics code for the Work Type.
Up to two numeric characters may be entered.

BCC
This field contains the valid Building Control Commission code for the Work Type.

Up to two numeric characters may be entered.

Active
If this box is checked on then the Work Type is available to the system.

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

Building Types

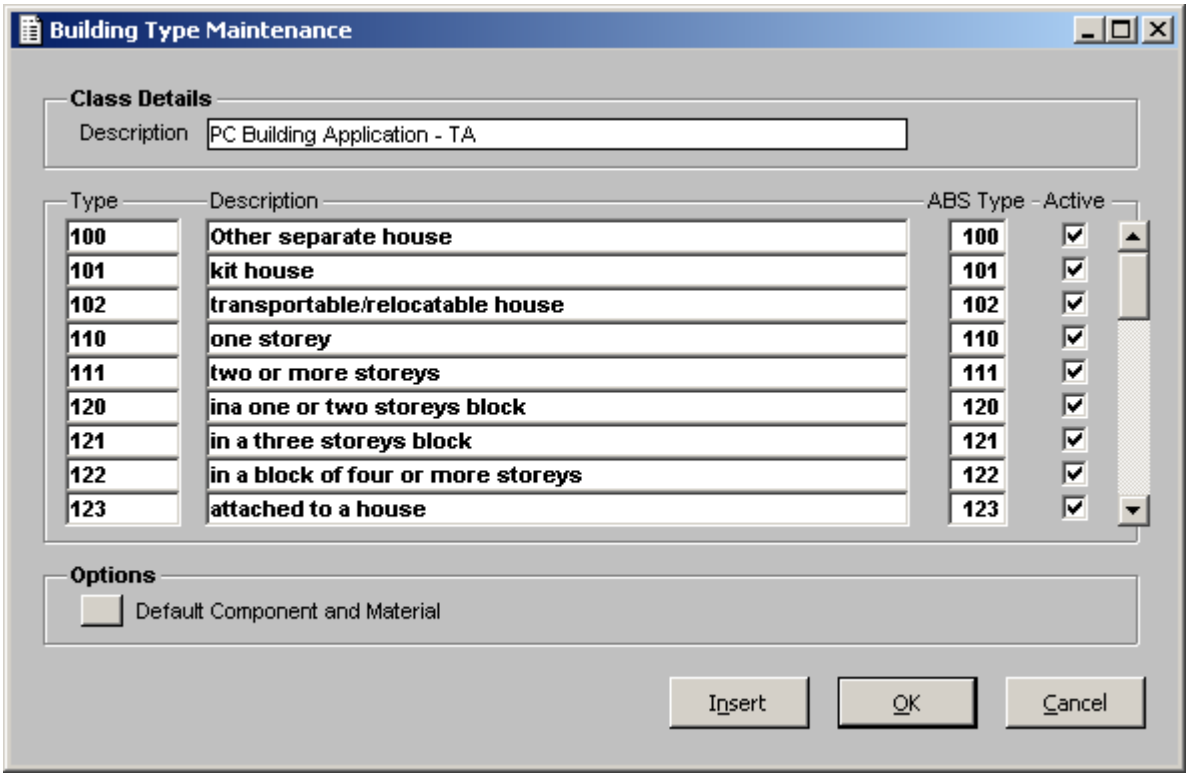
Where applications are to be recorded on the Australian Bureau of Statistics Return or Council or other organisations require certain statistical information, then the Building Types Parameter should be established. The Code and Description are User Definable however should fall in line with those specified by the ABS (if appropriate). A specific ABS code must be nominated against each Building Type.

An example of Building Types are:-
Houses (detached dwellings, cluster housing)
011 Separate house
012 Kit house
019 Transportable/relocatable house
Other residential
Semi-detached, row/terrace house, townhouse, duplex, etc
(Dwellings with own private grounds and no other dwellings above or below)
021 One storey
022 Two or more storeys
Flat, unit or apartment
(Dwellings without private grounds, usually sharing entrance/foyer/stairwell)
In a building comprising:
023 One or two storeys
024 Three storeys
025 Four or more storeys (should have an elevator)
026 Flat, unit or apartment attached to a house
Other buildings
030 Hotel, motel, etc
031 Hotel, motel, with flat, unit or apartment attached
040 Shop
041 Shop with flat, unit or apartment attached
050 Factory
051 Factory with flat, unit or apartment attached
060 Office
061 Office with flat, unit or apartment attached
070 Other business premises
071 Other business premises with flat, unit or apartment attached
080 Education building
081 Education building with flat, unit or apartment attached
090 Religious building
091 Religious building with flat, unit or apartment attached
100 Health building (ie. constant medical care provided
101 Health building with flat, unit or apartment attached
110 Entertainment and recreation building
111 Entertainment and recreation building with flat, unit or apartment attached
120 Miscellaneous building
121 Miscellaneous building with flat, unit or apartment attached

This parameter is used for the Australian Bureau of Statistics return.
This feature is optional.

Building Type Maintenance Form

This form allows for the creation and maintenance of Building types.



Building Type Maintenance Form

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

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

Description
This field contains the full description of the Building Type.
This field is mandatory.

ABS Type
This field contains the valid Australian Bureau of Statistics code for this Work Type.

Up to three numeric characters may be entered.

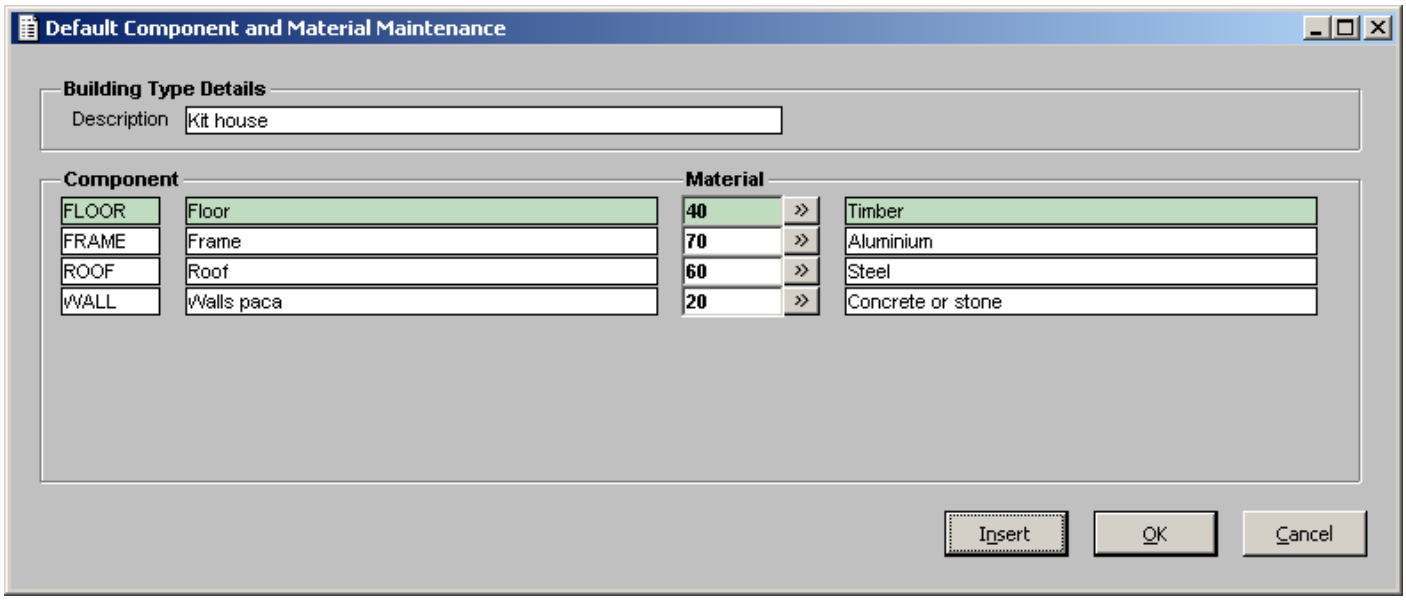
Active
If this box is checked on then the Building Type is available to the system.

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

Options – Default Component and Material
It is possible to enter in Default Component and Materials to be loaded for the Building Type when added to an Application. This Option Button will be bolded if default information has been entered for the Building Type currently in focus.

Default Component and Material Maintenance Form

This form allows for the defining of Default Component and Material Information for a Building Type. When the Building Type is added to an Application then this information is automatically loaded onto the Application for the Building Type entered.



Default Component and Material Maintenance Form

Building Type Details Description

This field contains the description of the Building Type to which you are assigning default Components and Materials. This field is display only and may not be maintained.

Component

The Component and its Description are shown in this field. The Component can be selected by using the Insert Option to display the Component Pop Up form.

Material

If default Material is to be set for the Component then it is able to be entered in this field. The Pop Up can be used to display a list of available Material for the Component. This field is optional.

Name Roles

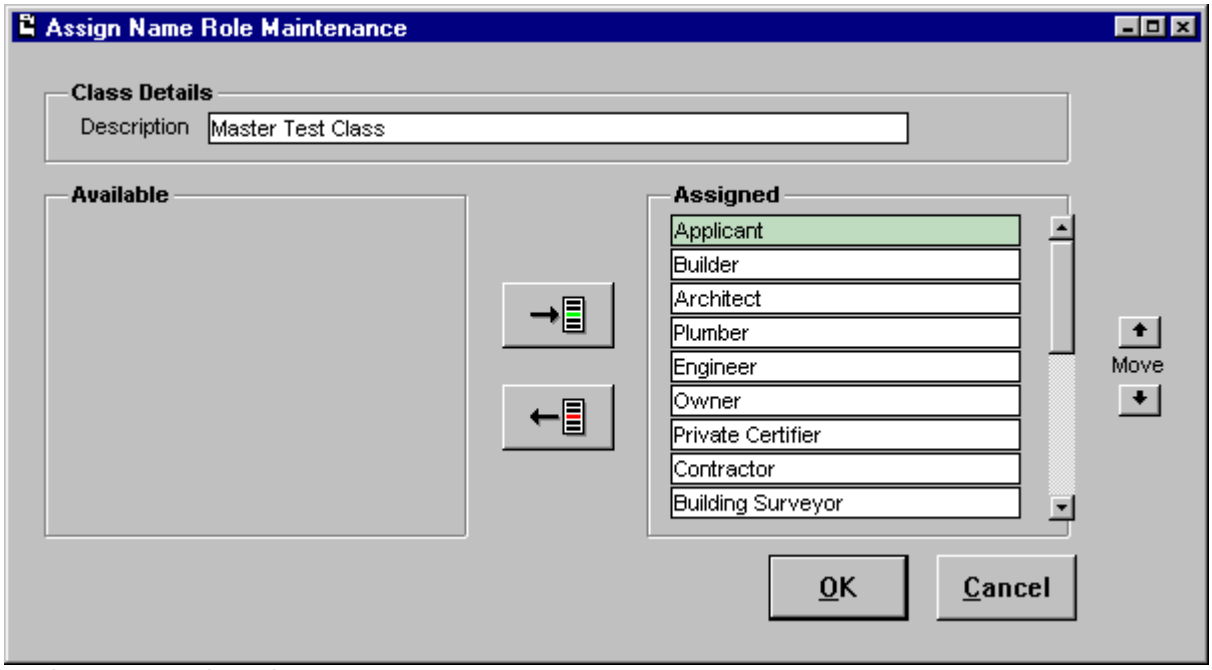
This parameter determines which name roles are available to the Class.
The following Standard Name Roles have been defined within Pathway:-

- Applicant
- Builder
- Architect
- Plumber
- Engineer
- Owner
- Private Certifier
- External Organisation
- Building Surveyor
- Contractor

If other Name Roles are required then they may be defined in Name Role Maintenance.
The Applicant name role is mandatory.
This function allows for the nomination of those name roles that will be made available to the Application Class.
Standard Name roles have been assigned, however the facility exists to create other Name Roles for use within the Application system.

Assign Name Role Maintenance Form

This form allows for the assigning of Name Roles to be available to the Application Class.
The Applicant Name Role is mandatory.



Assign Name Role Maintenance Form

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

Available
This list contains all available Applications 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 Application 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 Application Maintenance.

Memo Types

The Memo System is available throughout the Application System.
For details on how to establish Memos add and maintain memos, refer to the Memo User Guide.

Condition Groups/Types

Condition Groups
This parameter enables the highest level grouping of Conditions to be defined. Condition Groups are optional. Condition Groups also determine which conditions are printed on a land information certificate.

Conditions
This parameter enables the creation of Condition Types, the Condition Group they are linked to and whether the specific Condition is a Notifiable Condition.

Condition codes may be set up with a description to be used against the 'Condition' option in Application Lodgement or Application Maintenance.

In addition, this parameter enables access to the Word Processing system of the Council's choice (as specified in Word Processing Option) to create the standard Condition Document for the specific Condition Code.

These condition codes and the associated documents may be printed on Application documentation and when producing Property Certificates and can also be viewed at an Application level.

Conditions can be added against an Application Fee and also against the actual Application
Condition Parameters in Applications 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.

Letter Extract

These parameters must be defined to enable the creation of an Application Letter, Certificate or Permit document. These parameter options will interface with the selected word processing package(s) of the council. Selecting these packages and creating a directory structure for the storage of documents is documented in the Core Software Training Notes.

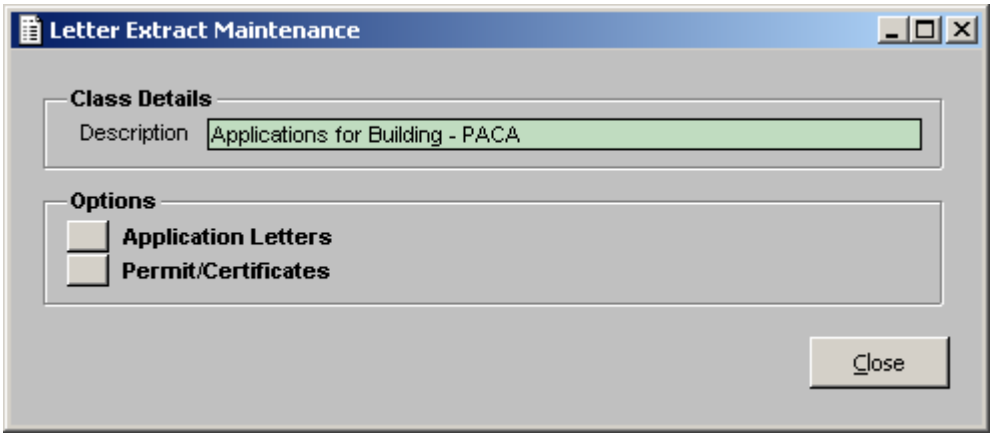
Extract Types are created in the Letters Extract parameters and represent lists of data that can be included into a requested document. Within the Application system, this could include lists of locations, decisions, consents etc.

For each Extract Type, the filtering criteria that apply need to be defined. The layout of the Extract Type document (including the relevant extract fields) is created via Word processing.
Extract Types can then be incorporated into the Main Letter, Certificate or Notice document (Merge Type) to create a template.

Letter Extract Maintenance Form

This form allows for the selecting of which Extracts are to be maintained. The Options available are Application Letters or Permit/Certificates.

Documents that are to be used in the Permit/Certificates function must first be defined in this menu under the Permit/Certificates option and then linked to the appropriate Permit/Certificate within Permit/Certificate maintenance.



Letter Extract Maintenance Form

Class Details
This field contains the description of the Class of Application to which you are defining Extracts for.

Options – Application Letters
Selecting the Application Letters option will allow for the creation or maintenance of Extracts that can be used for the creation of letters for Applications.

Options – Permit/Certificates
Selecting the Permit/Certificates option will allow for the creation or maintenance of Extracts that can be used for the creation of Permits/Certificates. These Extracts are then used within Merge Types defined under Permit/Certificates and are then available to be used within the Permit/Certificates functionality.

Module Link fields via Registers
When a Register is defined with an Application link, an Extract List definition will be created automatically within the Applications 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 Application is related will be extracted.

Applications – Extracts and Extracts with Filters

The following summarises the extract fields available for producing Certificates/Permits and Letters.

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	
AMENDMNT Amendments	N	«Date» «Description»	Amendments Maintenance	
APPDIMS Application Dimensions	Y	«Dimension» «Dimension_Code» «Dimension_Value»	Dimension Maintenance	
APPL_ATT Application Attachments	Y	«Attachment_File» «Attachment_Description»	Dimension Maintenance	
BANK Bank Guarantee Details	N	«Bank_G_Number» «Bank_G_Date» «Bank_G_Bank» «Bank_G_Branch» «Bank_G_Bank_Reference» «Bank_G_Contributor» «Bank_G_Agreed_Value» «Bank_G_Due_Date» «Bank_G_Collected_Date» «Bank_G_Amount_Collected» «Bank_G_Discharge Amount» «Bank_G_Discharge Date» «Bank_G_Discharge Reason» «Bank_G_Comments» «Bank_G_Expiry» «Bank_G_Type» «Bank_G_Type_Descr» «Bank_G_Fees» «Bank_G_History»	Bank Guarantee Maintenance Form	BANKFEES BANKHIST
BANKFEES Bank Guarantee Fee Transactions (only to be used as an Associated Extract to	N	«Bank_Fees_Type» «Bank_Fees_Code» «Bank_Fees_Date» «Bank_Fees_Amount»	Bank Guarantee Maintenance	

BANK)

BANKHIST Bank Guarantee Agreed Value History (only to be used as an Associated Extract to ***BANK***)	N	«Bank_Hist_Date» «Bank_Hist_Agreed_Value» «Bank_Hist_Comments»	Bank Guarantee Maintenance	
BCDIMS Building Classification Dimensions (only to be used as an Associated Extract to ***BLDCLASS***)	Y	«Dimension» «Dimension_Code» «Dimension_Value» «Dimension_Value1»	Building Classification Dimension	
BLDCLASS Building Classifications	Y	«Building_Class» «Building_Class_Descr» «Specific_Location» «Dimension_1_Code» «Dimension_1_Description» «Dimension_1_Value» «Dimension_2_Code» «Dimension_2_Description» «Dimension_2_Value» «Dimension_3_Code» «Dimension_3_Description» «Dimension_3_Value» «Dimensions»	Building Classification Maintenance	BCDIMS BLDTYPE
BLDTYPE Building Types (only to be used as an Associated Extract to ***BLDCLASS***)	Y	«Building_Type_Code» «Building_Type_Descr» «Component_1_Code» «Component_1_Descr» «Component_2_Code» «Component_2_Descr» «Component_3_Code» «Component_3_Descr» «Component_4_Code» «Component_4_Descr» «Component_5_Code» «Component_5_Descr» «Component_6_Code» «Component_6_Descr» «Component_7_Code» «Component_7_Descr» «Component_8_Code» «Component_8_Descr» «Component_9_Code» «Component_9_Descr» «Demolish_Dwellings» «Dueal_Occupancy» «Floor_Area» «Intended_Owner» «Material_1_Code» «Material_1_Descr» «Material_2_Code» «Material_2_Descr» «Material_3_Code» «Material_3_Descr» «Material_4_Code» «Material_4_Descr»	Building Classification Maintenance	

		«Material_5_Code» «Material_5_Descr» «Material_6_Code» «Material_6_Descr» «Material_7_Code» «Material_7_Descr» «Material_8_Code» «Material_8_Descr» «Material_9_Code» «Material_9_Descr» «New_Used_Materials» «Number_Of_Storeys» «Number_Of_Units» «Preexisting_Dwellings» «Private_Certifier» «Septic_Tank» «Trade_List» «Work_Type_1» «Work_Type_2» «Work_Type_3» «Work_Type_4» «Work_Type_5» «Work_Type_6» «Work_Type_7» «Work_Type_8» «Work_Type_9»		
COND Application Conditions (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 Application 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	
D&FCONT	N	«Date Entered» «User Entered» «Policy Type»		DEVCONT FINCONT

		«Dollar Input Value» «Dollar Input Type» «m2 Input Type» «m2 Input Value» «Total Charge» «GST Amount» «Net Charge» «Development Contributions» «Financial Contributions»	
DECISION Application Decisions (Associated Extract to ***RELAPPL***)	Y	«Approval_Number» «Type» «Date» «Effective_Date» «Authority» «Rejection_Reason» «Under_Appeal» «Description»	Decision Maintenance
DEVCONT	N	«DC Development Activity» «DC Invoiced Amount» «DC Formula Used» «DC Development Type» «DC Quantity» «DC Post Lot Subs» «DC Charge» «DC Deduction Reason 1» «DC Credit Value 1» «DC Deduction Reason 2» «DC Credit Value 2»	
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
DEVDEPT Development Departures	N	«Instrument» «Clause» «Standard» «Approved» «Date_Entered» «Departure_Basis»	Development Departures Maintenance
DEVDIMS Development Dimensions	Y	«Dimension» «Dimension_Code» «Dimension_Value»	Development Date - Dimensions Maintenance
EXTD Extensions	N	«Extension_Date» «Extension_Reason_Code» «Extension_Reason» «From_To_Be_Commenced»	Extension Maintenance

		«From_To_Be_Completed» «From_Expiry» «To_To_Be_Commenced» «To_To_Be_Completed» «To_Expiry» «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	
FEES Application/Contribution Fees	Y	«Fee_Type» «Fee_Description» «Calculated_Fee» «Accepted_Fee» «Accepted_Fee_Tax» «Paid» «Paid_Tax» «Balance» «Refunded» «Status» «Paid_NC» «Bank_Guarantee» «Transactions» «Conditions»	Application Fee Maintenance	FEETRAN COND
FEETRAN Application Fee Transaction (only to be used as an Associated Extract to ***FEES, NONCASH, RECEIPTS***)		«Fee_Type» «Fee_Type_Code» «Transaction_Type» «Transaction_Type_Code» «Transaction_Date» «Invoice_Number» «Receipt_Number» «Non_Cash_Number» «Date» «Amount» «Tax» «Comment»	Application Fee Maintenance	
FINCONT	N	«FC Financial Activity» «FC Invoiced Amount» «FC Formula Used» «FC Dollar Input Type» «FC Dollar Input Value» «FC m2 Input Type» «FC m2 Input Value»		

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» «Template_4» «Template_5» «Template_6» «Notes» «Failed» «Questionnaire_Answers»	Inspection Maintenance	NOTES FAILED
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	N	«Invoice_Number» «Invoice_Date» «Invoice_Total_Inc_Tax»	Application Fee Maintenance	FEEDB

as Accounting Method or requiring to Print Invoice from Fees Maintenance		«Invoice_Total_Exc_Tax» «Invoice_Tax_Total» «Invoice_Fees»		
JOINTAPP Joint Applications	N	«Class» «Type» «Application_Number»		
LANDUSE Land Uses	Y	«Location» «Land_Use» «Status»	Zone & Land Use Maintenance	
LOCATION Application 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 Application Names/Roles	Y	«Role» «Identity» «Id_Address_Formatted» «Id_Address_1_Line» «Id_Com_1» «Id_Com_2» «Id_Com_3» «Id_Info_1» «Id_Info_2» «Id_Info_3»	Names Maintenance	
NONCASH Non-Cash	N	«Non_Cash_Number» «Non_Cash_Date» «Non_Cash_Type» «Non_Cash_Description» «Non_Cash_Agreed_Value» «Non_Cash_Payment_Type» «Non_Cash_Contributor» «Non_Cash_Location» «Non_Cash_Valuer» «Non_Cash_Valuation_Date» «Non_Cash_Dimension_Value» «Non_Cash_Work_Completed» «Non_Cash_Comments» «Fees»	Non-Cash Allocation Maintenance	FEETRAN
NOTES Inspection Notes (only to be used as an Associated Extract to ***INSPECT***)	N	«Date» «Time» «Officer» «Officer_Id» «Note»	Inspection Maintenance	
PARCEL Application Parcels	N	«Formatted_Parcel»	Location Maintenance - Property	

			Maintenance
PARCPLAN Plans on a Parcel	Y	«Parc_Plan_Amend_Date» «Parc_Plan_Comments» «Parc_Plan_Consent_Date» «Parc_Plan_External_Ref» «Parc_Plan_Gazette_Date» «Parc_Plan_Gazette_Number» «Parc_Plan_Number» «Parc_Plan_Purpose_Code» «Parc_Plan_Purpose_Descr» «Parc_Plan_Receive_Date» «Parc_Plan_Registered_Date» «Parc_Plan_Response_Name» «Parc_Plan_Subdivision» «Parc_Plan_Type_Code» «Parc_Plan_Type_Descr» «Parc_Plan_Type_Prefix»	Location Maintenance - Property Maintenance
PERMCERT Permits & Certificates	Y	«Type» «Number» «Issued_Date» «Expiry_Date» «Effective_Date» «Description» «Perm_Cert_Locations» «Insurer_Name» «Insurer_Address» «Insurer_Address_1_Line» «Ins_Date» «Ins_Liability» «Insured_Name» «Insured_Address» «Ins_Builder_Name» «Ins_Builder_Address» «Ins_Comments» «Levy_Name» «Levy_Address» «Levy_Address_1_Line» «Levy_Amount» «Levy_Date» «Levy_Receipt»	Permit & Certificate Maintenance
PLANCOND Conditions on a Plan	Y	«Plan_Cond_Descr» «Plan_Cond_Type» «Plan_Cond_Applied_Date» «Plan_Cond_Lapse_Date» «Plan_Cond_Doc» «User_Defined_Field_1» «User_Defined_Field_2» «User_Defined_Field_3» «User_Defined_Field_4»	
PLPACOND Conditions on a Plan on a Parcel	Y	«Parc_Plan_Cond_Code» «Parc_Plan_Cond_Descr» «Parc_Plan_Cond_Appl_Date» «Parc_Plan_Cond_Lapse_Date» «Parc_Plan_Cond_Doc» «Parc_Plan_Cond_Doc_TPK» «User_Defined_Field_1» «User_Defined_Field_2» «User_Defined_Field_3»	

		«User_Defined_Field_4»		
PROPPLAN Plans on a Property	Y	«Plan_Amend_Date» «Plan_Comments» «Plan_Consent_Date» «Plan_External_Ref» «Plan_Gazette_Date» «Plan_Gazette_Number» «Plan_Number» «Plan_Purpose_Code» «Plan_Purpose_Descr» «Plan_Receive_Date» «Plan_Registered_Date» «Plan_Response_Name» «Plan_Subdivision» «Plan_Type_Code» «Plan_Type_Descr» «Plan_Type_Prefix»		
RECEIPTS Application Receipts	Y	«Receipt_Number» «Receipt_Date» «Receipt_Amount» «Receipt_Tax» «Recipient_Name» «Recipient_Addr» «Fees»		FEETRAN
REFERENC Application References	Y	«Reference_Type» «Reference_Description» «Reference_Number» «Status» «Status_Date»	Application References	
RELAPPL Related Applications	Y	«Application_Number» «Class» «Type» «Application_Description» «Lodgement_Date» «Application_Status» «Application_Decisions»	Related Applications Maintenance	DECISION
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» «Licence_Decision_Number» «Licence_Decision_Type» «Licencee_Name» «Licencee_Address»	Related Licences	
RESPONSE Responses	Y	«Response_Name» «Response_Address» «Response_Address_1» «Response_Date» «Response_Type_Code» «Response_Type_Descr» «Response_Summary»	Response Maintenance	

SERVICES	Y	«Contractor_Area_Code» «Service_Reference» «Service_Comments» «Service_Comments»	Property/Application Services
SUBDIMS Subdivision Dimensions	Y	«Dimension» «Dimension_Code» «Dimension_Value»	
TITLE Application Titles	Y	«Formatted_Title»	
ZONES Zone Use	Y	«Zone_Level» «Zone_Parcel_Description» «Zone_Code» «Zone_Description» «Zone_Date_Effective» «Zone_Sub_Zone» «Zone_Percentage» «Zone_Status» «Zone_Plan_Type» «Zone_Plan_Number» «Zone_Plan_Description» «Zone_Plan_Gazette_Date» «Zone_Plan_Gazette_Number» «Zone_Plan_Council_Apprv» «Zone_Document»	
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 }}

Extract Fields	Data Extracted From
General Fields	
Doc_Addressee_SalCon	Personal Name Maintenance
Doc_Addressee_Salutation	Personal Name Maintenance
Document_Appl_DPBARCODE	Barcodes
Document_Applicant_Addr_M	Default Address Maintenance
Document_Applicant_Addres	Names Maintenance
Document_Applicant_Comm_1	Names Maintenance
Document_Applicant_Comm_2	Names Maintenance
Document_Applicant_Comm_3	Names Maintenance
Document_Applicant_Comm_D	Names Maintenance
Document_Applicant_DPID	Names Maintenance
Document_Applicant_Info_1	Names Maintenance
Document_Applicant_Info_2	Names Maintenance
Document_Applicant_Info_3	Names Maintenance
Document_Applicant_Info_D	Names Maintenance
Document_Applicant_Name	Default Address Maintenance
Document_Completion_Date	Document Request Maintenance
Document_Deflt_Comm_Descr	Names Maintenance
Document_Deflt_Info_Descr	Names Maintenance
Document_Expiry_Date	Document Request Maintenance
Document_Fee_Amount	Document Request Maintenance
Document_Issue_Date	Document Request Maintenance
Document_Lodgement_Date	Document Request Maintenance
Document_Name	System Generated
Document_Number	Document Request Maintenance
Document_Path	Word Processing Parameters
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
Merge_Type_Name	System Generated
Merge_Type_Path	Word Processing Parameters
Accepted_Total	Application Fees Maintenance
Accepted_Total_Tax	Application Fees Maintenance
Affected_Property	Affected Property Maintenance
Affected_Property_StAddr	Affected Property Maintenance
All_Formatted_Titles	Personal Name Maintenance
All_Locations	Locations Maintenance
All_Prop_Addresses	Locations Maintenance
All_Prop_Descr	Locations Maintenance
Amount_Retained	Subdivision Data Maintenance
Applicant_Address	Names Maintenance

Applicant_Address_1_Line	Names Maintenance
Applicant_Comm_1	Names Maintenance
Applicant_Comm_2	Names Maintenance
Applicant_Comm_3	Names Maintenance
Applicant_Info_1	Names Maintenance
Applicant_Info_2	Names Maintenance
Applicant_Info_3	Names Maintenance
Applicant_Name	Names Maintenance
Application_Date	Application Data Maintenance
Application_Expiry_Date	Application Data Maintenance
Application_Number	Application Data Maintenance
Application_Number_Ref	Application Data Maintenance
Application_Status	Application Data Maintenance
Application_Type	Application Type Maintenance
Architect_Address	Names Maintenance
Architect_Address_1_Line	Names Maintenance
Architect_Comm_1	Names Maintenance
Architcet_Comm_2	Names Maintenance
Architect_Comm_3	Names Maintenance
Architect_Info_1	Names Maintenance
Architect_Info_2	Names Maintenance
Architect_Info_3	Names Maintenance
Architect_Name	Names Maintenance
Assessment_Number	Rates System
Balance_Total	Application Summary
Brought_Forward	
Builder_Address	Names Maintenance
Builder_Address_1_Line	Names Maintenance
Builder_Comm_1	Names Maintenance
Builder_Comm_2	Names Maintenance
Builder_Comm_3	Names Maintenance
Builder_Info_1	Names Maintenance
Builder_Info_2	Names Maintenance
Builder_Info_3	Names Maintenance
Builder_Name	Names Maintenance
Building_Surveyor_Address	Names Maintenance
Building_Surveyor_Adrs_1	Names Maintenance
Building_Surveyor_Comm_1	Names Maintenance
Building_Surveyor_Comm_2	Names Maintenance
Building_Surveyor_Comm_3	Names Maintenance
Building_Surveyor_Info_1	Names Maintenance
Building_Surveyor_Info_2	Names Maintenance
Building_Surveyor_Info_3	Names Maintenance
Building_Surveyor_Name	Names Maintenance
Calculated_Total	Application Fees Maintenance
Carried_Forward	
Cons_Approved_Date	Subdivision Data Maintenance
Cons_Office_Number	Subdivision Data Maintenance
Cons_Received_Date	Subdivision Data Maintenance
Consultant_Address	Names Maintenance
Consultant_Address_1_Line	Names Maintenance
Consultant_Comm_1	Names Maintenance
Consultant_Comm_2	Names Maintenance
Consultant_Comm_3	Names Maintenance
Consultant_Info_1	Names Maintenance
Consultant_Info_2	Names Maintenance
Consultant_Info_3	Names Maintenance
Consultant_Name	Names Maintenance
Contractor_Address	Names Maintenance
Contractor_Address_1_Line	Names Maintenance
Contractor_Comm_1	Names Maintenance
Contractor_Comm_2	Names Maintenance

Contractor_Comm_3	Names Maintenance
Contractor_Info_1	Names Maintenance
Contractor_Info_2	Names Maintenance
Contractor_Info_3	Names Maintenance
Contractor_Name	Names Maintenance
Contrib_Accepted_Tot_Tax	Application Fee Maintenance
Contrib_Accepted_Total	Application Fee Maintenance
Contrib_BG_Total	Bank Guarantee Maintenance
Contrib_Balance_Total	Application Fee Maintenance
Contrib_Calculated_Total	Application Fee Maintenance
Contrib_Paid_Tot_Tax	Application Fee Maintenance
Contrib_Paid_Total	Application Fee Maintenance
Debtor_Address	Pathway Debtor Address
Debtor_Chk_Digit	Pathway Debtor Number Check Digit
Debtor_Name	Pathway Debtor Name
Debtor_Number	Pathway Debtor Number
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
Description	Application Summary
Endorsement_Date	Application Data Maintenance
Engineer_Address	Names Maintenance
Engineer_Address_1_Line	Names Maintenance
Engineer_Comm_1	Names Maintenance
Engineer_Comm_2	Names Maintenance
Engineer_Comm_3	Names Maintenance
Engineer_Info_1	Names Maintenance
Engineer_Info_2	Names Maintenance
Engineer_Info_3	Names Maintenance
Engineer_Name	Names Maintenance
File_Completed_Date	Application Data Maintenance
File_Started_Date	Application Data Maintenance
Floor_Area_Ratio	Development Data Maintenance
Guarantee_Amount	Subdivision Data Maintenance
Guarantee_Details	Subdivision Data Maintenance
Invoice_Date	Application Fees Maintenance
Invoice_Number	Application Fees Maintenance
Invoice_Tax_Total	Application Fees Maintenance
Invoice_Total_Exc_Tax	Application Fees Maintenance
Invoice_Total_Inc_Tax	Application Fees Maintenance
LPA_descriptor_1	Property
LPA_descriptor_2	Property
LPA_descriptor_3	Property
LPA_descriptor_4	Property
LPA_descriptor_5	Property
Linen_Approved_Date	Subdivision Data Maintenance
Linen_Received_Date	Subdivision Data Maintenance
Linen_Sent_Date	Subdivision Data Maintenance
Lodgement_Date	Consents Maintenance
Municipality_ABS_Code	Municipality Code Maintenance
Municipality_BCC_Code	Municipality Code Maintenance
Municipality_Code	Municipality Code Maintenance
Municipality_Descr	Municipality Code Maintenance
Open_Space_Ratio	Development Data Maintenance
Owner_Address	Names Maintenance
Owner_Address_1_Line	Names Maintenance
Owner_Comm_1	Names Maintenance
Owner_Comm_2	Names Maintenance

Owner_Comm_3	Names Maintenance
Owner_Info_1	Names Maintenance
Owner_Info_2	Names Maintenance
Owner_Info_3	Names Maintenance
Owner_Name	Names Maintenance
Paid_Total	Application Fees Maintenance
Paid_Total_Tax	Application Fees Maintenance
Payment_Reference	Application TPK Number
PF_ABN	Plan First – Names Maintenance
PF_Admin_Fee	Plan First Administration Fee Report
PF_Amount_Forwarded	Plan First Amount Forwarded
PF_Consent_Authority	Plan First – Municipality Name Maintenance
PF_Contact_Email	Plan First - Names Maintenance
PF_Contact_Name	Plan First – Names Maintenance
PF_Contact_Phone	Plan First – Names Maintenance
PF_Contact_Postion	Plan First – Names Maintenance
PF_EFT_Number	Plan First – Receipt Number from Report
PF_Fee_Collected	Plan First – Fee Amount Collected
PF_Month	Plan First – Month of Report
PF_Return	Plan First – Yes or No
PF_Year	Plan First – Year of Report
Plumber_Address	Names Maintenance
Plumber_Address_1_Line	Names Maintenance
Plumber_Comm_1	Names Maintenance
Plumber_Comm_2	Names Maintenance
Plumber_Comm_3	Names Maintenance
Plumber_Info_1	Names Maintenance
Plumber_Info_2	Names Maintenance
Plumber_Info_3	Names Maintenance
Plumber_Name	Names Maintenance
Primary_Location	Location Maintenance
Primary_Prop_Address	Location Maintenance
Primary_Prop_Descr	Location Maintenance
Primary_Prop_Ward	Location Maintenance
Processing_Group	Application Data Maintenance
Property_Summary	Location Maintenance
Property_TPK	Property
Response_Address	Responses
Response_Address_1	Responses
Response_Date	Responses
Response_Name	Responses
Response_Summary	Responses
Response_Type_Code	Responses
Response_Type_Descr	Responses
Responsibility_Group	Application Data Maintenance
Responsible_Officer	Application Data Maintenance
Setback_Front	Development Data Maintenance
Setback_Left	Development Data Maintenance
Setback_Rear	Development Data Maintenance
Setback_Right	Development Data Maintenance
Site_Description	Location Maintenance
Total_Floor_Area	Building Classification Maintenance
Total_Land_Area	Property Summary
Total_Responses_Received	Response Maintenance
Work_Commenced_Date	Application Data Maintenance
Work_Completed_Date	Application Data Maintenance
Work_To_Be_Commenced_By	Application Data Maintenance
Work_To_Be_Completed_By	Application Data Maintenance

Permit/Certificates

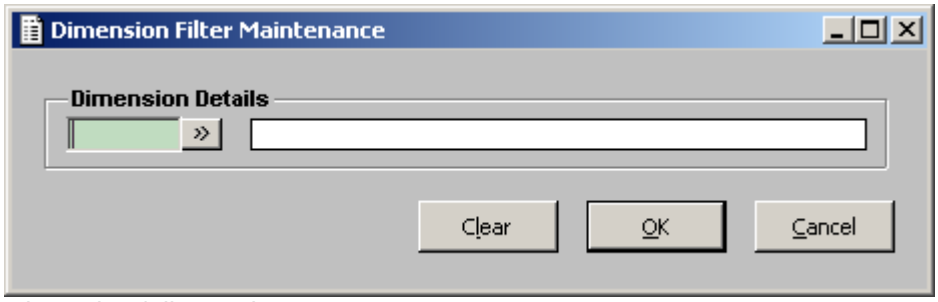
PC_Comments	Permit / Certificate Maintenance
PC_Effective_Date	Permit / Certificate Maintenance
PC_Expiry_Date	Permit / Certificate Maintenance
PC_Ins_Builder	Permit / Certificate Maintenance
PC_Ins_Builder_Addr	Permit / Certificate Maintenance
PC_Ins_Comments	Permit / Certificate Maintenance
PC_Ins_Date	Permit / Certificate Maintenance
PC_Ins_Insured	Permit / Certificate Maintenance
PC_Ins_Insured_Addr	Permit / Certificate Maintenance
PC_Ins_Insurer	Permit / Certificate Maintenance
PC_Ins_Insurer_Addr	Permit / Certificate Maintenance
PC_Ins_Liability	Permit / Certificate Maintenance
PC_Issued	Permit / Certificate Maintenance
PC_Levy_Address	Permit / Certificate Maintenance
PC_Levy_Amount	Permit / Certificate Maintenance
PC_Levy_Date	Permit / Certificate Maintenance
PC_Levy_Name	Permit / Certificate Maintenance
PC_Levy_Receipt	Permit / Certificate Maintenance
PC_Locations	Permit / Certificate Maintenance
PC_Number	Permit / Certificate Maintenance
PC_Property	Permit / Certificate Maintenance
PC_Type	Permit / Certificate Maintenance

Inspections

Last_Inspection_Date	Inspection Maintenance
Last_Inspection_Inspector	Inspection Maintenance
Last_Inspection_Time	Inspection Maintenance
Next_Inspection_Date	Inspection Maintenance
Next_Inspection_Inspector	Inspection Maintenance
Next_Inspection_Time	Inspection Maintenance

Dimension Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***APPDIMS*** - Application Dimensions and the Additional Filter button selected.



Dimension /Filter Maintenance Form

Type
Displays the selected dimension type

Pop Up
List of available dimension types available for selection.

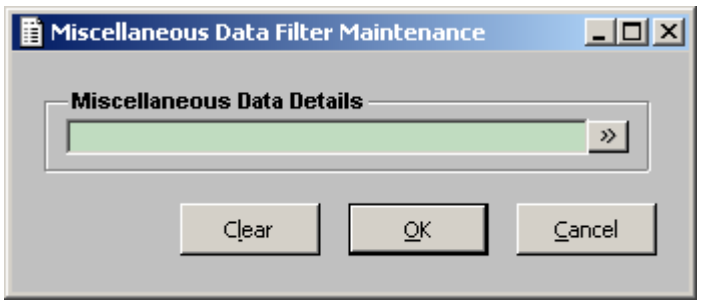
Description
This field displays the description of the Dimension Type.

Clear Button

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

Miscellaneous Data Forms Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***MISCDATA*** - Miscellaneous Data and the Additional Filter button selected.



Miscellaneous Data Forms/Filter Maintenance Form

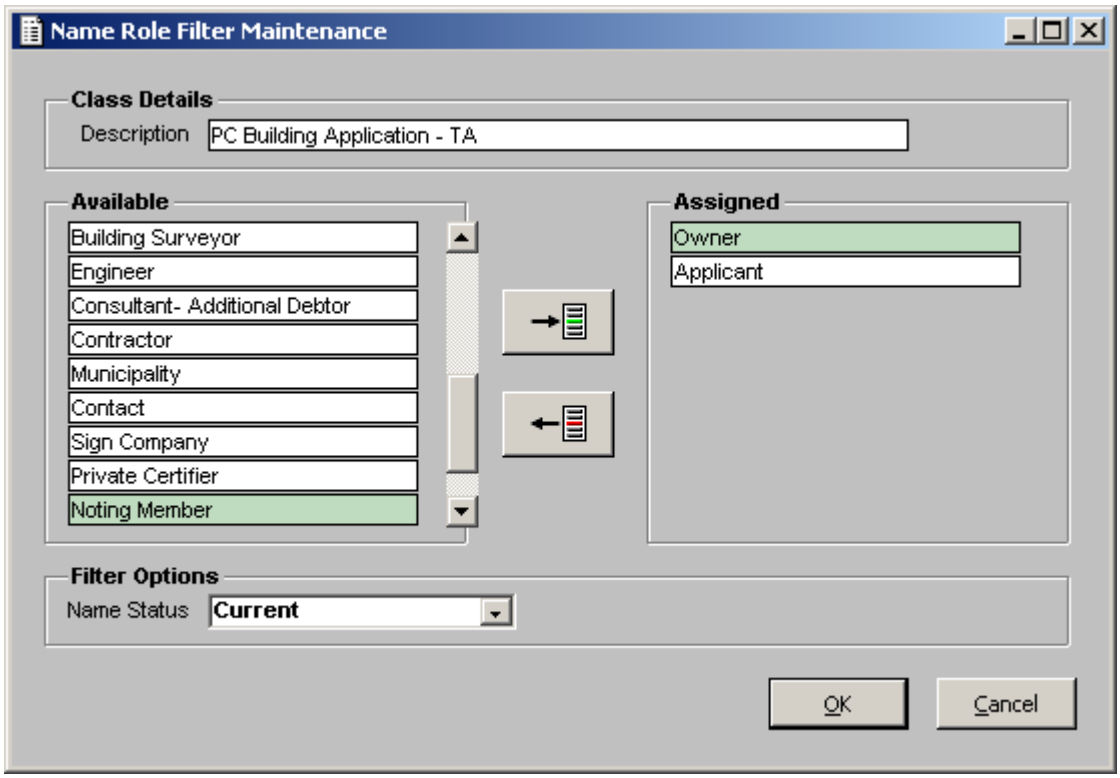
Type/Description
Displays the selected Miscellaneous Data type

Pop Up
List of available Miscellaneous Data types available for selection.

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

Name Role Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***NAMES*** – Application Names and the Additional Filter button selected.



Name Role/Filter Maintenance Form

Class Details - Description
The Class Description that the Names filter is for is displayed in this field.

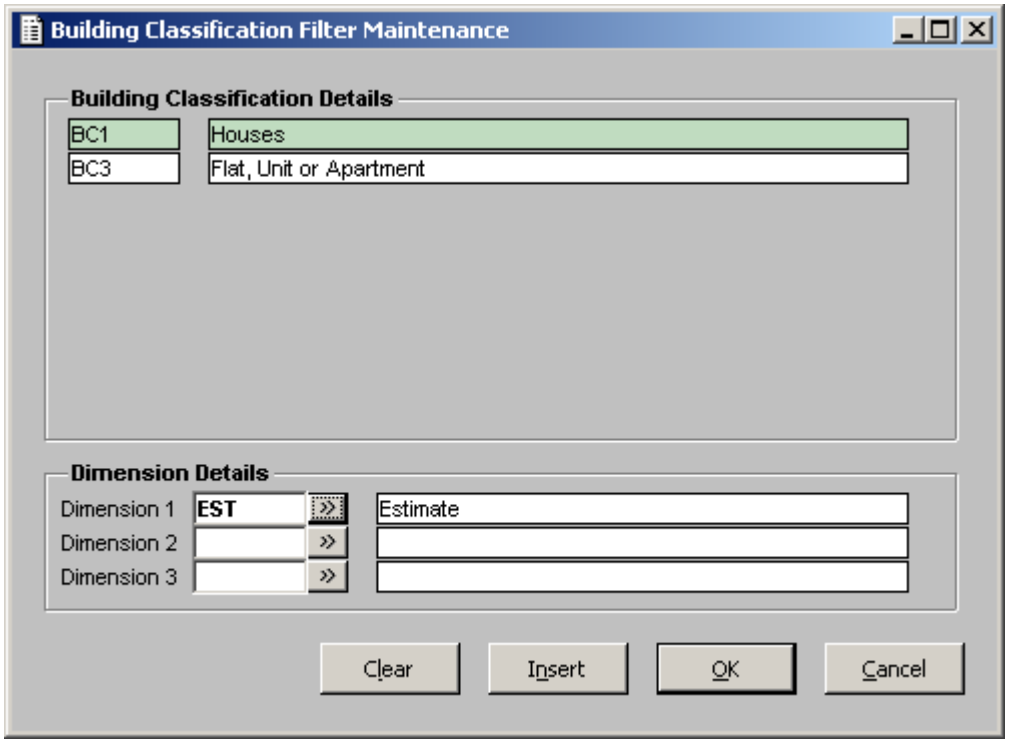
Available
List of available Name Role Types available for selection are displayed in the Available Area.

Assigned
The Name Role Types that have been Assigned to the Extract are displayed in this Area.

Filter Options – Name Status
The Status of the Name Role Types to be used is shown in this form. The Status is defaulted to Current but can be changed to Historic or Current & Historic if required.

Building Classification Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***BLDCLASS*** - Building Classifications and the Additional Filter button selected.
This form allows for several scenarios to be selected.
1. Users can choose a particular Building Classification Type to filter on with no Dimensions selected.
2. Users can choose multiple Building Classification Types to Filter on with no Dimensions selected.
3. They can choose a particular Building Classification Type and then further select one or more dimensions (up to 3) that belong to that Classification Type.
4. They choose 3 specific dimensions from over all Building Classifications. (ie. not selecting any Type).
5. They choose multiple Building Classification Types with various dimensions.
6. Or select none of these fields so that the Building Classification Extract will print all Building Classifications and all Dimensions associated with those Classifications.



Building Classification/Filter Maintenance Form

Building Classification Details

Displays the selected Building Classification type. This field can be left blank if Dimensions are to be used over all Building Classifications and not for just a particular Building Classification.

Dimension Details – Dimension 1

The First Dimension to be used can be defined in this field. This field can be left blank.

Dimension Details – Dimension 2

The Second Dimension to be used can be defined in this field. This field can be left blank.

Dimension Details – Dimension 3

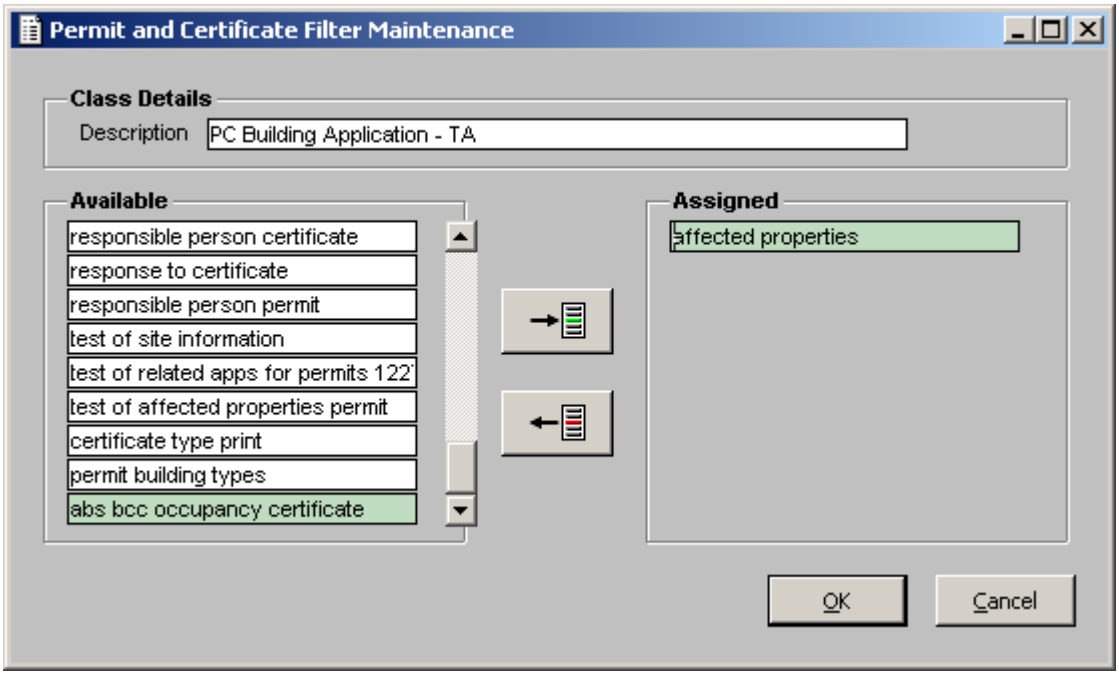
The Third Dimension to be used can be defined in this field. This field can be left blank.

Clear Button

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

Permits and Certificate Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***PERMCERT***- Permits and Certificate and the Additional Filter button selected.



Permits and Certificate Filter Maintenance Form

Class Details - Description

This field displays the Class Description that the Permit and Certificate Types are being assigned to.

Available

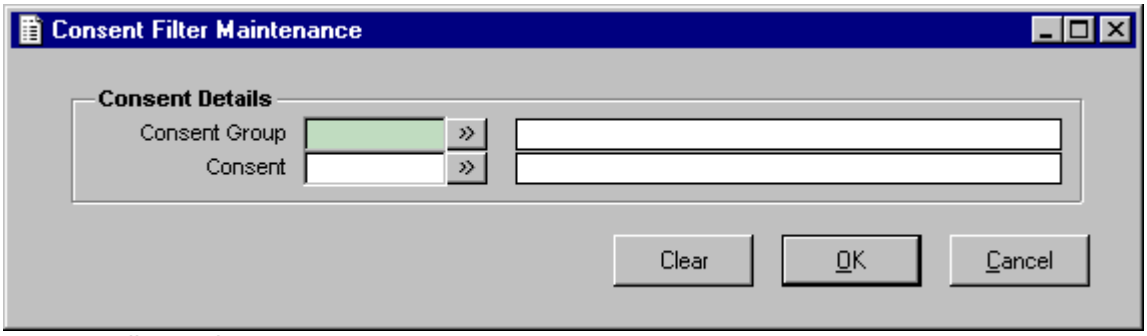
A List of available Permit and Certificate types available for selection are displayed in the Available Area.

Assigned

The Permit and Certificate Type(s) that have been Assigned to the Extract are displayed in the Assigned Area.

Consent Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***CONSENTS*** – Consents and the Additional Filter button selected.



Consent Filter Maintenance Form

Consent Group

Enter a Consent Group Code if known or use the PopUp Button to select a Consent Group from the predefined list.

Consent

Enter a Consent Code if known or use the PopUp Button to select a Consent from the predefined list.

Clear Button

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

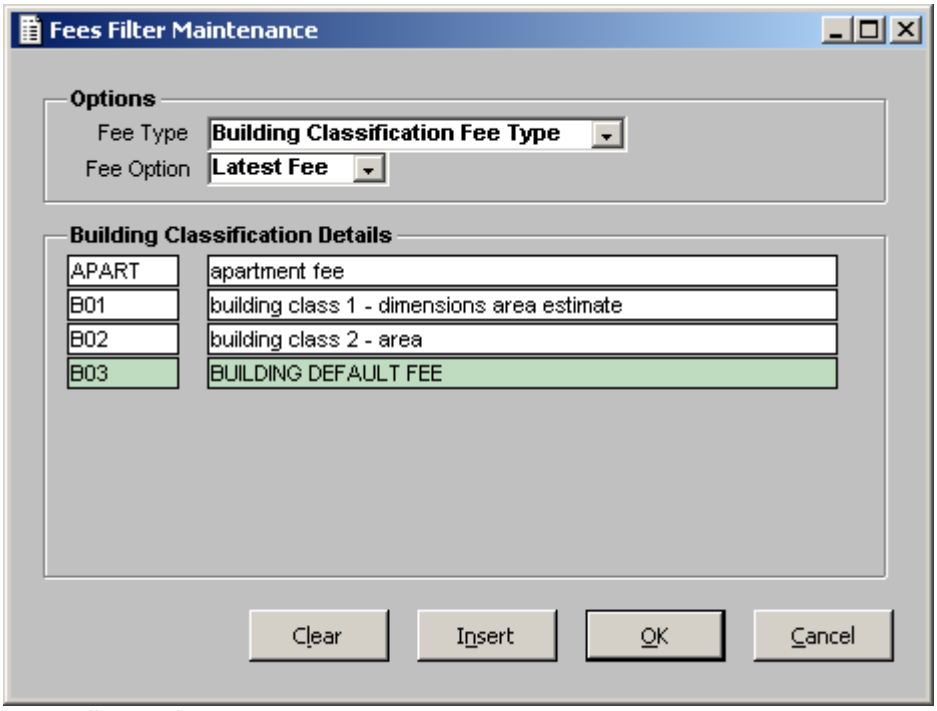
Fee Filter Maintenance Form

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' is selected, then the current partly paid or unpaid fees will be extracted.

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



Fees Filter Maintenance Form

Application setup with the following fees

Ln 1	Application Fee A	5.00
Ln 2	Application Fee B	15.00
Ln 3	Consent Fee 1	5.50
Ln 4	Consent Fee 2	6.00
Ln 5	Application 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	Application Fee A	5.00
			Ln 2	Application Fee B	15.00
			Ln 3	Consent Fee 1	5.50
			Ln 4	Consent Fee 2	6.00
			Ln 5	Application 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
Application	All Fees	Blank	Ln 1	Application Fee A	5.00
			Ln 2	Application Fee B	15.00
			Ln 5	Application Fee A	9.00
Application	Latest Fee	Blank	Ln 5	Application Fee A	9.00
Consent	Latest Fee	Blank	Ln 4	Consent Fee 2	6.00
All	All Fees	Application Fee B & Inspection Fee 2	Ln 2	Application Fee B	15.00
			Ln 6	Inspection Fee 2	35.60
All	Latest Fee	Application 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;

- Application Fee Type
- Building Classification Fee Type
- Consents Fee Type
- Contribution Fee Type
- Inspection Fee Type
- All

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

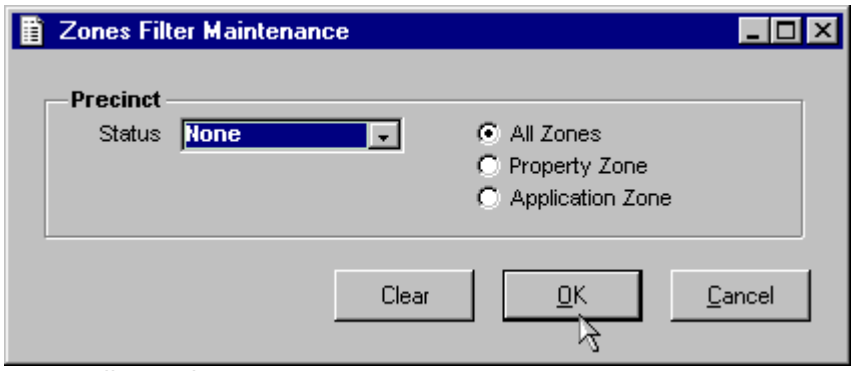
The Fee Details are shown when the Insert Button has been selected and Fees have been selected to be used in the Filter for the Extract.

Clear Button

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

Zones Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***ZONES*** – Zones and the Additional Filter button selected.



Zones Filter Maintenance Form

Status

Select a Status from the drop down list. The options available are;

- None
- Proposed
- Historic
- Current

Zones Selections

The options available are;

- All Zones
- Property Zones
- Application Zones

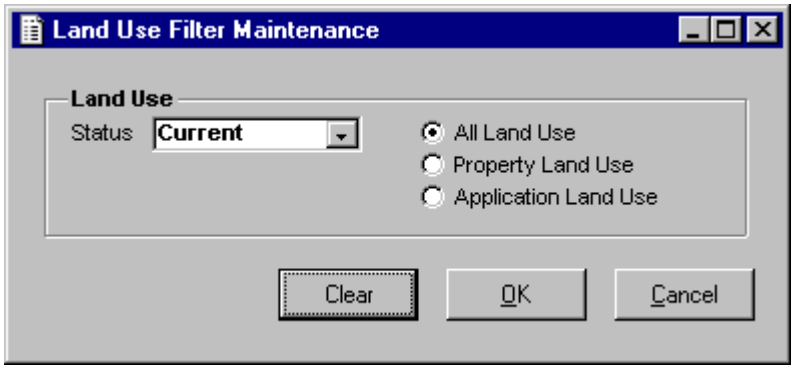
NOTE: When Application Zones are selected as a filter, the Status field will be dimmed as selecting by Application Zones only will find those with 'Proposed Status".

Clear Button

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

Land Use Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***LANDUSE*** – Land Use and the Additional Filter button selected.



Land Use Filter Maintenance Form

Land Use – Status
Select a Status from the drop down list. The options available are;

- None
- Proposed
- Historic
- Current

Land Use Selections
The options available are;

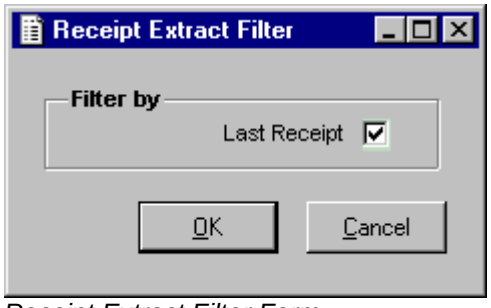
- All Land Use
- Property Land Use
- Application Land Use

NOTE: When Application Land Uses are selected as a filter, the Status field will be dimmed as selecting by Application Land Use only will find those with 'Proposed Status".

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

Receipt Extract Filter Form

The Receipt Extract Filter allows for the nominating of the Last Receipt to be used for the Extract. This is available for use when the ***RECEIPTS*** Extract has been used.

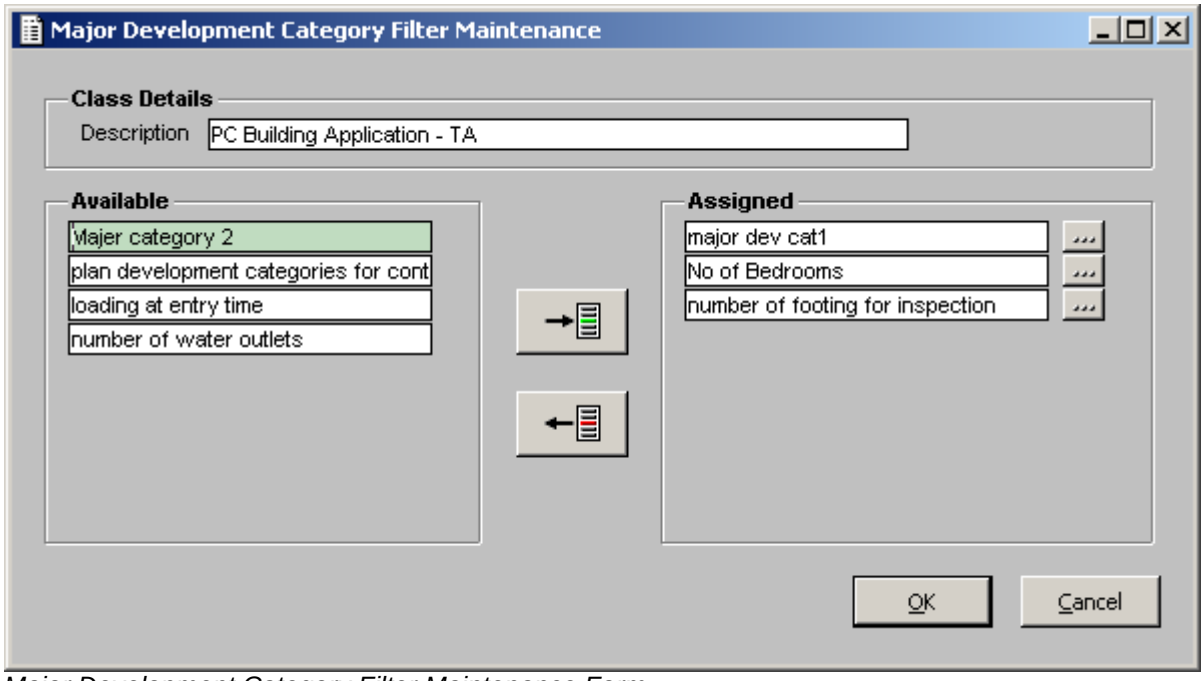


Receipt Extract Filter Form

Filter by – Last Receipt
If this box is checked on the Receipt Extract will only extract the latest receipt on the Application. If the box is checked off then all receipts on the Application will be extracted for the document,

Major Development Category Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***MAJMIN***- Major & Minor Categories and the Additional Filter button selected.



Major Development Category Filter Maintenance Form

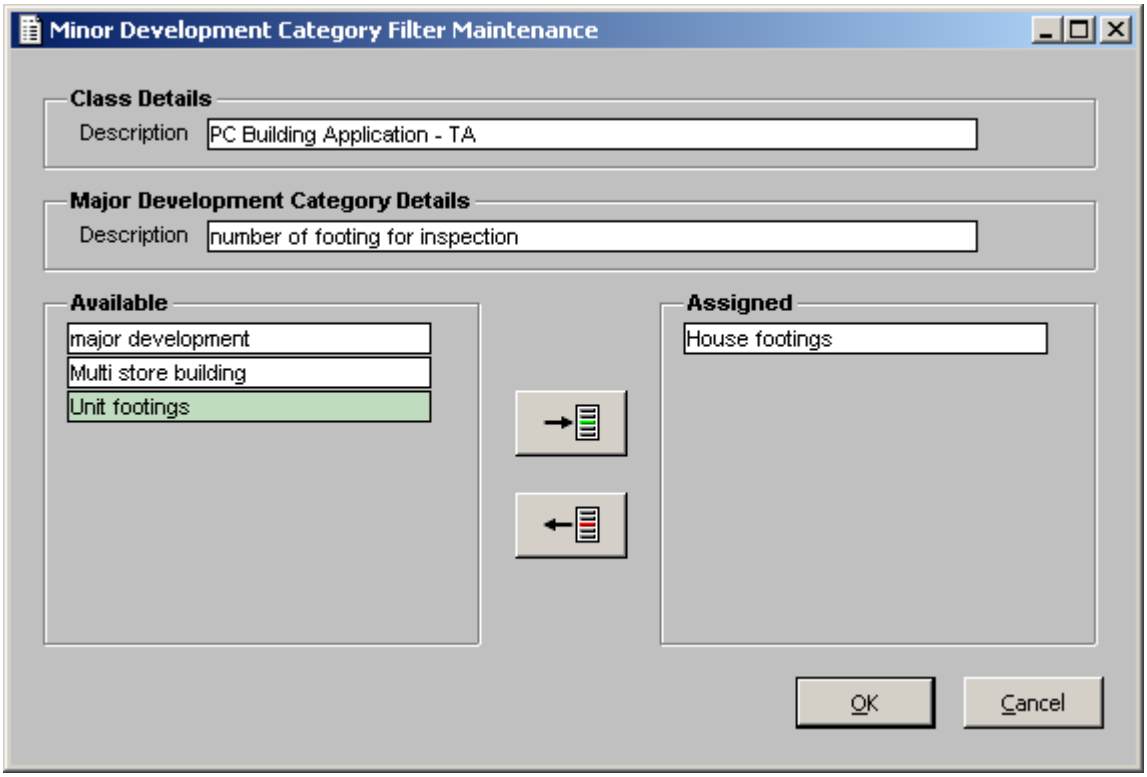
Class Details - Description
This field displays the Class Description that the Major Development Category Types are being assigned to.

Available
A List of available Major Development Categories available for selection are displayed in the Available Area.

Assigned
The Major Development Categories that have been Assigned to the Extract are displayed in the Assigned Area. A Detail Button is available to allow further filtering by Minor Categories within each of the Major Categories.

Minor Development Category Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***MAJMIN***- Major & Minor Categories and the Additional Filter button selected and then the Detail Option against a Major Category has been selected.



Minor Development Category Filter Maintenance Form

Class Details - Description
This field displays the Class Description that the Major Development Category Types are being assigned to.

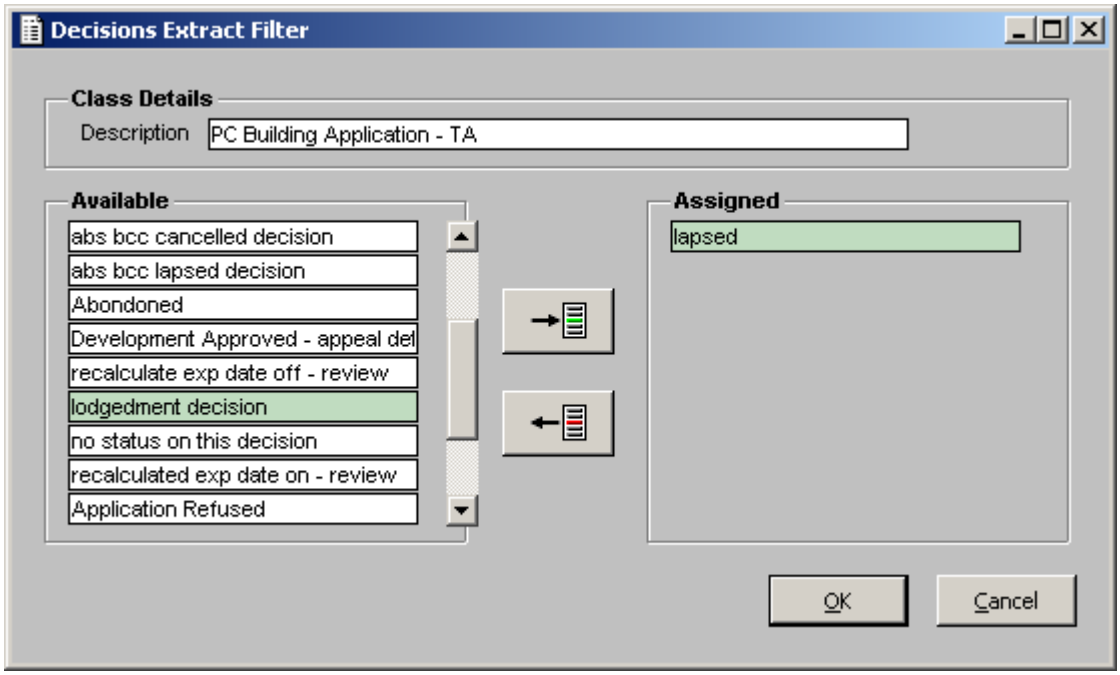
Major Development Category Details - Description
This field displays the Description of the Major Development Category Type that the Minor Categories are being assigned to.

Available
A List of available Minor Development Categories available for selection are displayed in the Available Area.

Assigned
The Minor Development Categories that have been Assigned to the Extract are displayed in the Assigned Area.

Decision Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***DECISION*** - Decisions and the Additional Filter button selected.



Decisions Filter Maintenance Form

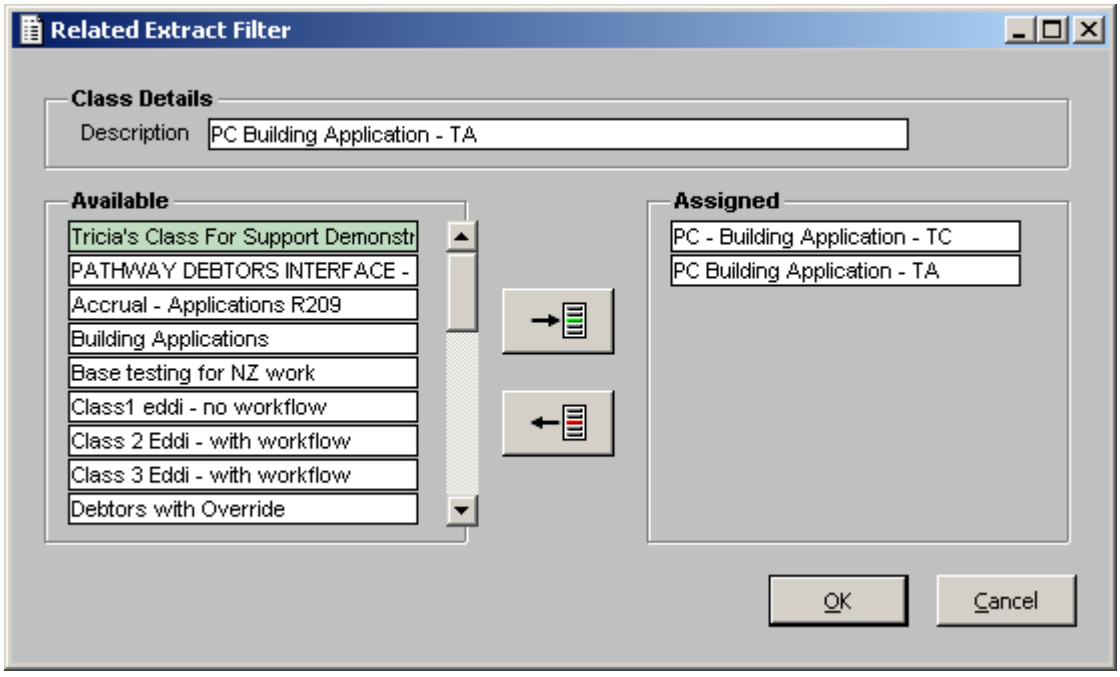
Class Details - Description
This field displays the Class Description that the Decisions are being assigned to.

Available
A List of available Decisions available for selection are displayed in the Available Area.

Assigned
The Decisions that have been Assigned to the Extract are displayed in the Assigned Area.

Related Application/Licence Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***RELAPPL*** – Related Applications or ***RELLICN*** – Related Licence and the Additional Filter button selected.



Related Application Filter Maintenance Form

Class Details - Description
This field displays the Class Description that the Related Applications are being assigned to.

Available
A List of available Applications available for selection are displayed in the Available Area.

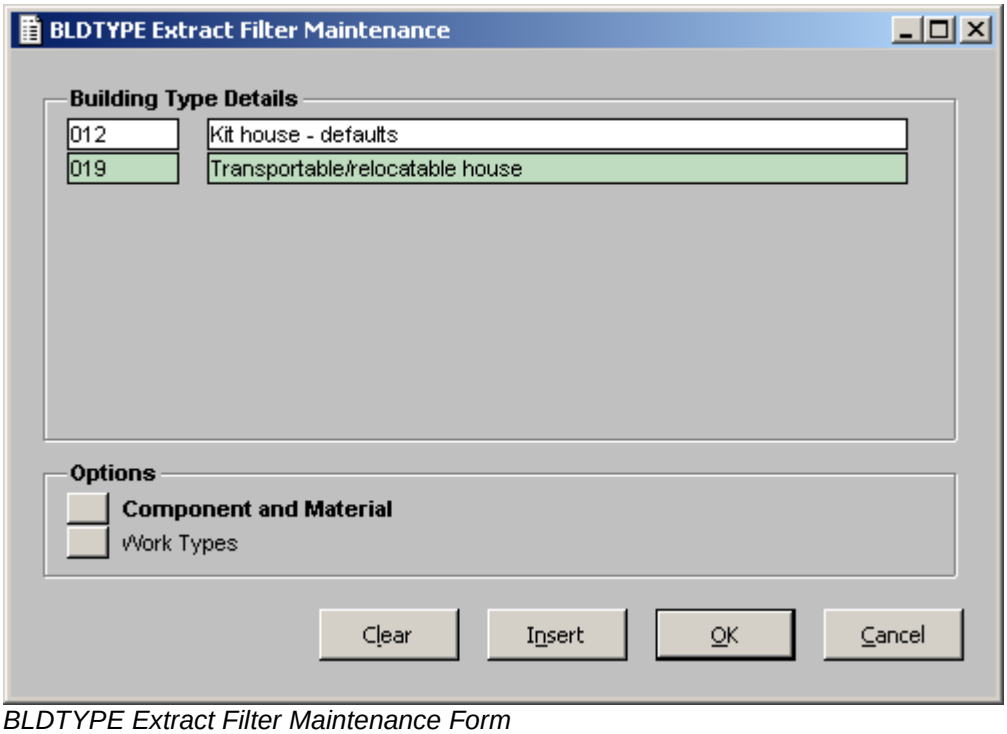
Assigned
The Application Types that have been Assigned to the Extract are displayed in the Assigned Area.

Building Type Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***BLDTYPE*** – Building Types and the Additional Filter button selected.

Building Types can be selected by using the Insert button. This shows the User the Building Type Pop Up which allows the User to multi select the required Building Types.

If no Building Types are selected on the Additional Filter form, then ALL Building Types are extracted by default. The Clear Button will clear ALL Building Types AND the Components and Materials and Work Types from the Filter form.



BLDTYPE Extract Filter Maintenance Form

Building Type Details

Buildings Types that have been selected to be the only ones included on the Extract are shown in this area. If no Building Types are shown then all Building Types are extracted by default.

Options – Component and Material

The Component and Materials Option Button allows the User to specify up to nine Components and Materials to be extracted.

Options – Work Types

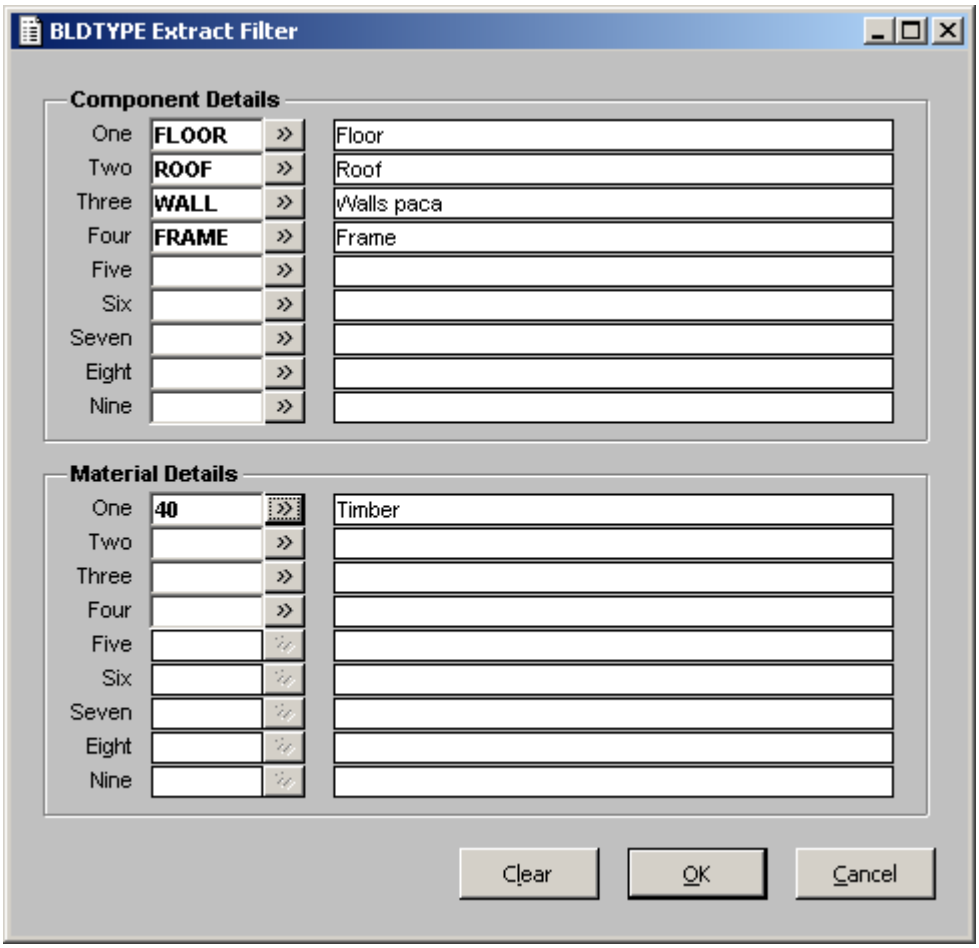
The Work Types Option Button allows the User to specify up to nine Work Types to be extracted.

BLDTYPE Component & Material Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***BLDTYPE*** – Building Type and the Additional Filter button selected. From the Filter the Option Component & Material was selected.

The Component and Material Filter form works as follows:-

- Only Components specified will be extracted. If left blank, nothing is extracted.
- A Material can only be selected after the Component has been selected.
- The Material available for selection will only be those Materials assigned to that Component as set up in the Parameters.
- If a Material has been selected, then data will only be extracted if the Material against the Component on the Application matches the Material selected on the Filter Form.
- If a Material has NOT been selected for a Component, then the filter will extract which ever Material is against that Component on the Application.
- The Clear button clears both the Components and the Materials.
- Both the Components and Materials Pop Up forms work in single select modue and NOT multi-select.



BLDTYPE Component & Material Filter Maintenance Form

Component Details

The Compoent Details show those Components that have been selected to be included in the extract. If no Components have been selected then no Components will appear in the extract. Up to nine Components can be selected.

Material Details

The Material selected for the Component is displayed in this field. If a Material has been selected, then data will only be extracted if the Material against the Component on the Application matches the Material selected on the Filter form.

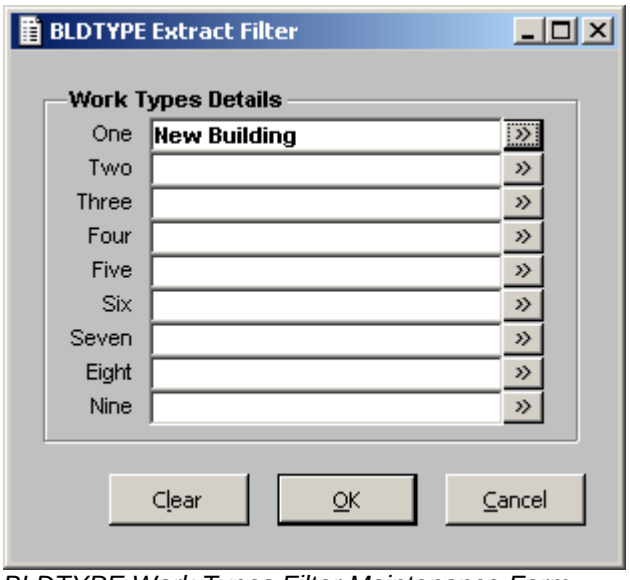
If a Material has NOT been selected for a Component, then the filter will extract which ever Material is against that Component on the Application.

BLDTYPE Work Types Filter Maintenance Form

This form is displayed from the Extract Type Maintenance Form when the Extract List Type is ***BLDTYPE*** – Building Type and the Additional Filter button selected. From the Filter the Option Work Types was selected.

The Work Types Option allows the User to specify up to nine Work Types to be extracted. The Work Type selected against 'One' will get extracted into 'Work Type 1' and so on.

- Only Work Type specified will be extracted. If left blank, nothing is extracted.
- The Clear Button clears all the Work Types
- The Work Types Pop Up form works in single selecte mode NOT milti-select.



BLDTYPE Work Types Filter Maintenance Form

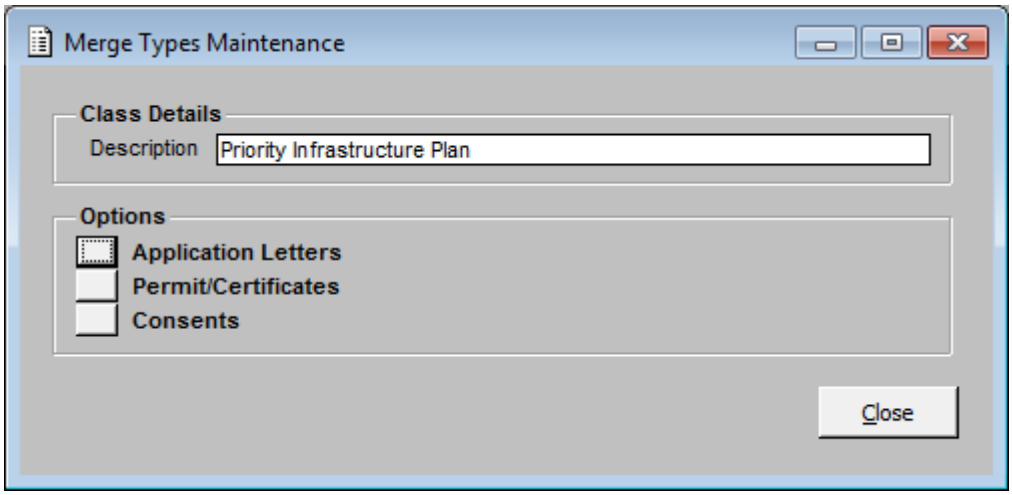
Work Types Details
The specified Work Types are shown in this area. Only Work Types specified will be extracted. If the field is left blank, then nothing is extracted.

Merge Types

Merge Types define the fields and lists that are to be included as part of the final merged document (Letter, Certificate or Notice).
For each Merge Type, the Type of Document (always LETTER within the Applications system), Included Data Fields and Included Extract Types are defined. The layout of the Merge Type document (including the relevant extract fields) is created via Word processing.

Merge Types Maintenance Form

Merge Types Maintenance for each class enables the creation and maintenance of Letters and Permits and Certificates.



Merge Type Maintenance Form

Class Details
This field is the Class Details Description.

Options

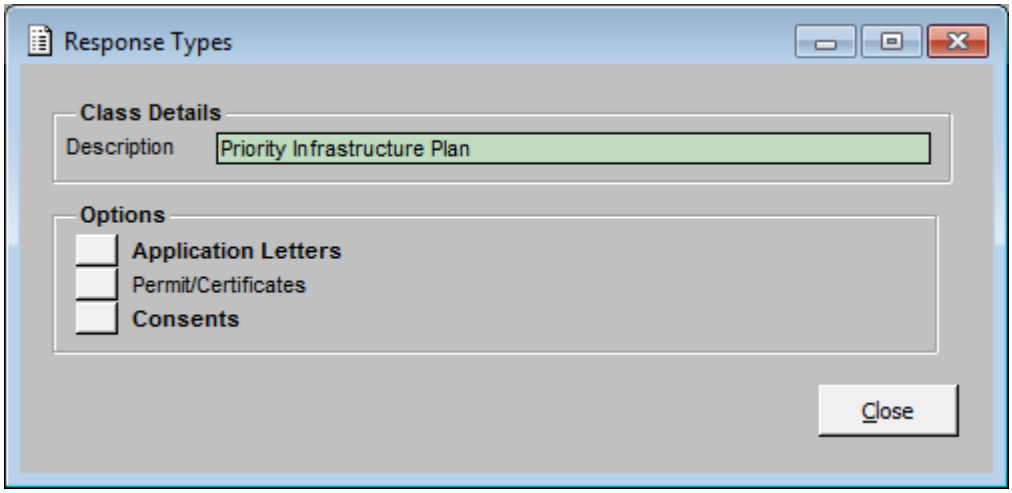
The three options Letters, Permits and Certificates and Consents each detail out to a Merge Type Search Profile. The form is used to search on previously created Merge Types or for the creation of New Merge Types. The Creation and Maintenance of Merge Types is documented further in the Word Processing Guide.

Response

This parameter enables a default list of response types to be created. Response types are text based informational details, which can be recorded against a final generated word document.
For example - Response Types could be created to record details such as Phone calls and Objections to documentation received. The Response Type codes and related descriptions can be created via this parameter option.
Responses are controlled by a Word Processing Document Form and are fully detailed in the Word Processing User Guide.
However, a general outline of Responses is as follows.
Responses allow a User to enter a specific Response to an Application. There are two ways that a Response may be entered in the Applications 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 application. Their Response to the Application is entered against the Letter Request sent.
The Second type of Response could be from a person who does not live near the proposed Application 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 Application Summary Form.
These Responses then may be a deciding factor as to whether the Application is finally approved.
Responses are able to be defined for Letters or Permits & Certificates within the Application Module. They are also used for the Objections and Supporters Function within Applications.

Response Types Form

Response Types for Application can be defined either within Letters or the Permit & Certificates areas. Select the required area the Response is to be recorded for.



Response Types Form

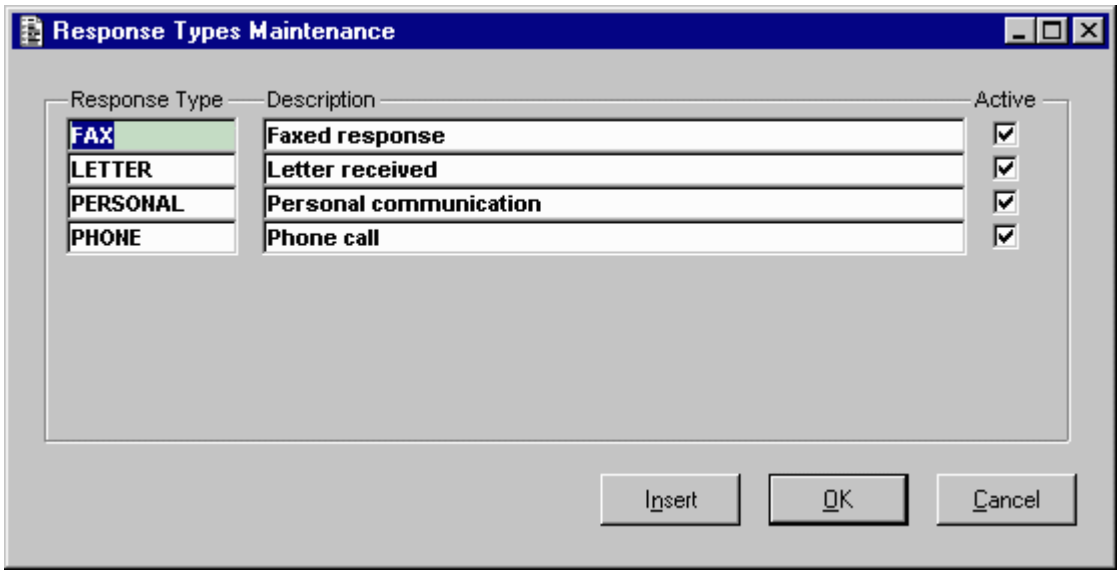
Class Details - Description
The Description of the Class is shown in this field. This is the Class that the Application Letters and Permit/Certificate Responses are for.

Options – Application Letters
If Response Types for Letters are required to be reviewed or created then select the Application Letters Option.

Options – Permit / Certificates
If Response Types for Permit/Certificates are required to be reviewed or created then select the Permit/Certificates Option.

Options – Consents
If Response Types for Consents are required to be reviewed or created then select the Consents option.

Response Types Maintenance Form



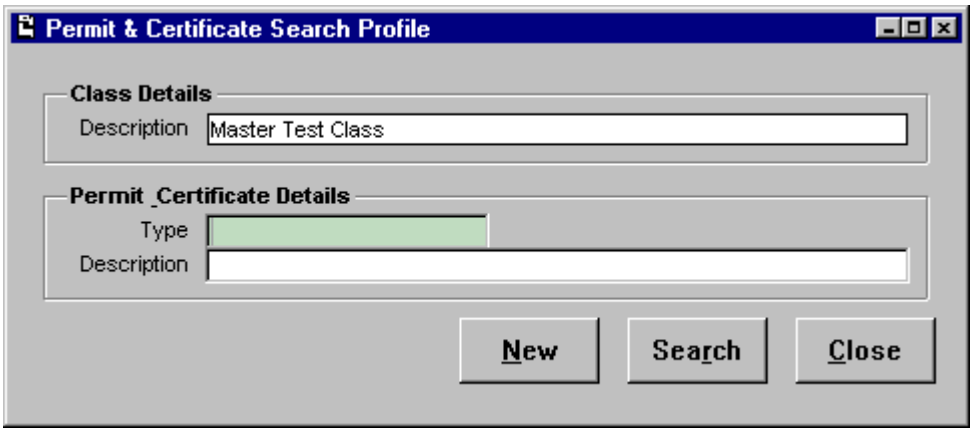
Response Types Maintenance Form

Permits & Certificates

This parameter allows for the establishment of Permit and Certificate types and descriptions.
Each type is specified as to whether it is a Permit, Certificate or an Indemnity Insurance Certificate.
Numbering is allocated for each Certificate type. If access to an application is to be via the Certificate number then a Reference Type needs to be nominated against the specific Certificate or Permit.
For each Certificate Parameter type, the appropriate Merge Type must be specified. The Merge Type is not mandatory to the Permits and Certificates process.

Permits & Certificates Search Profile Form

The Permits and Certificates Search Profile allows search on existing Permits and Certificates or the ability to create new ones.



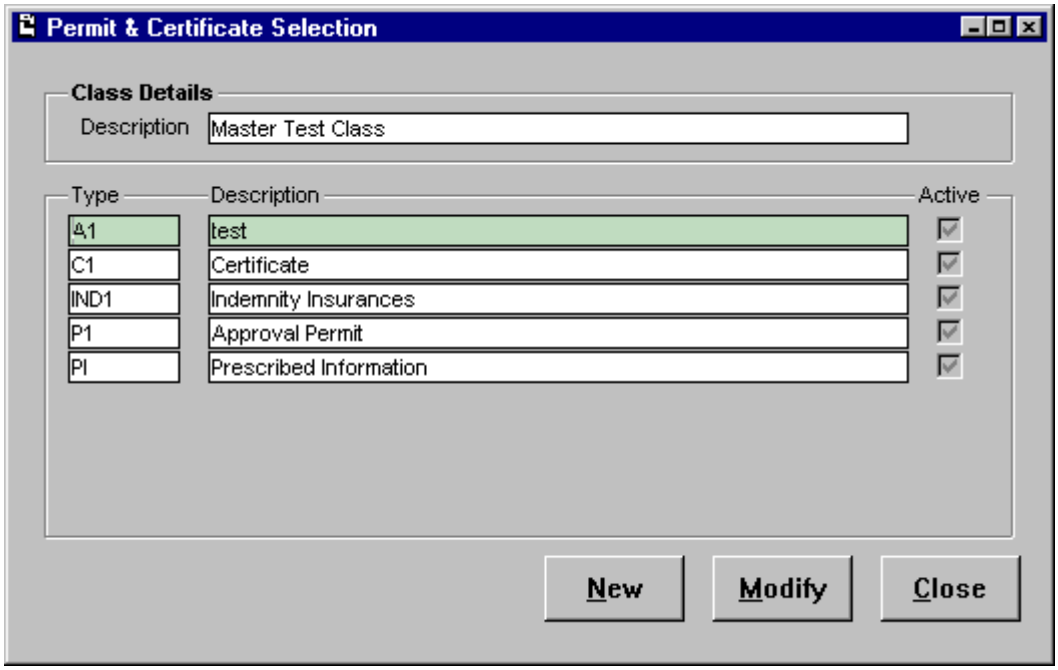
Permits & Certificates Search Profile Form

Class Details
This field is the Description of the Class currently being used.

Permits & Certificates Details
These fields provide a search path by Type or Description . Once your Type or Description is entered press the Search button to begin the Search.

Permits and Certificate Selection Form

Permit and Certificate Selection provides a list of the previously created Permits and Certificates to modify or the ability to create new ones. This form is displayed once the Search Button on the Permits an Certificates Search Profile is selected.



Permits and Certificate Selection Form

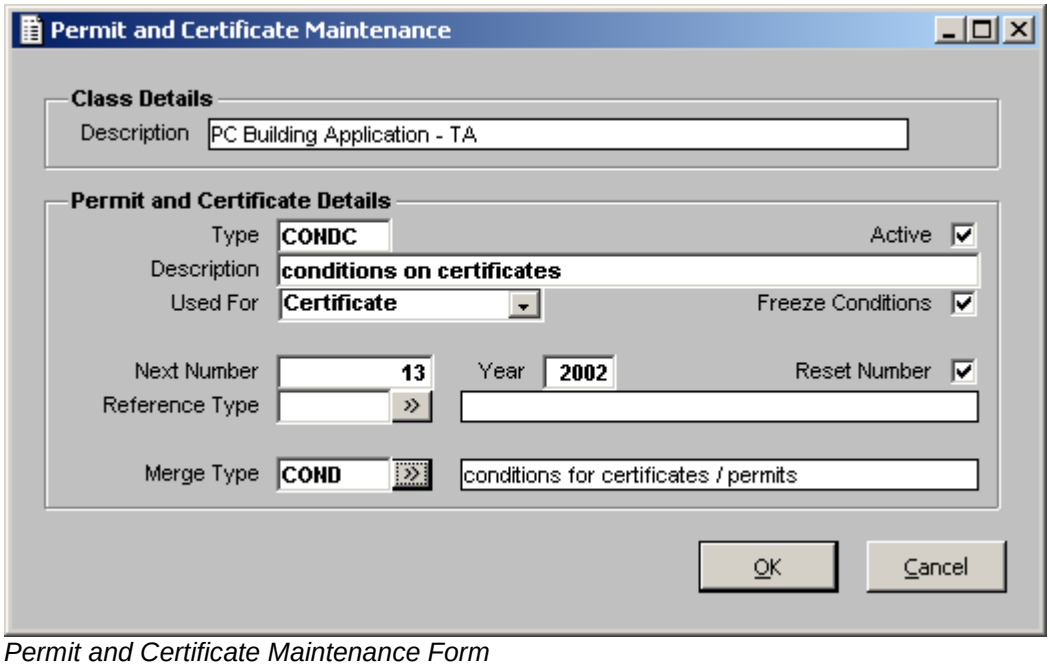
Class Details

This field is the Description of the Class currently being used.

The Type and Description Fields detail each of the Type of Permit/Certificates along with a fuller description. An Active Checkbox is detailed at the end of the description field.
If the check box is checked on then the Certificate or Permit may be modified. If the check box is checked off then this particular Certificate or Permit cannot be modified or used.

Permit and Certificate Maintenance Form

Permit and Certificate Maintenance is used to create new Permits and Certificates or update existing ones, that can then be used within Application Maintenance.



Permit and Certificate Maintenance Form

Class Details - Description

This field is the Description of the Class currently being used.

Permit and Certificate Details - Type
A six digit alphanumeric Type is required to differentiate between each Permit and Certificate Type. A Description line is provided to expand on the document type.

Permit and Certificate Details - Active
The Active Flag is used to identify those Permits & Certificates that are able to be used within Application Maintenance.

Permit and Certificate Details - Description
A six digit alphanumeric Type is required to differentiate between each Permit and Certificate Type. A Description line is provided to expand on the document type.

Permit and Certificate Details – Used For
The Used For Field has four selections. These being: -

- Permit
- Certificate
- Indemnity Insurance
- Long Service Levy

Each Type will require a selection type to be defined.

Permit and Certificate Details – Freeze Conditions
When the Freeze Conditions is checked on and a Permit or Certificate of this type is added to an Application the Conditions linked to that Application are 'frozen'. This means that existing Conditions will not be editable, and no more Conditions can be added or deleted for the Application.

The Freeze Conditions field will not be editable once it has been checked on and Applications with Frozen Conditions exists for the Permit and Certificate Type that has been flagged on.

An override is available at the Application Maintenance level if the User has access to the Unfreeze Conditions Authority Option.

Permit and Certificate Details – Next Number / Year
The Next Number Field and Year is set from Parameters, with the first number appearing for each new Type Created. This number will increment each time a particular Certificate or Permit of this Type is created.

Permit and Certificate Details – Reset Number
The Reset Number box if checked on allows for this Particular Certificate or Permit type to be reset to 1 when the parameter option to reset all Applications is run. If the box is not checked on, this Type will not have it's numbering reset when the reset is run.

Permit and Certificate Details – Reference Type
A Reference Type may be selected to assign to each Certificate or Permit when created for an Application.

Permit and Certificate Details – Merge Type
A Merge Type may be selected to be printed once the request for a Certificate or Permit has been completed within the Application

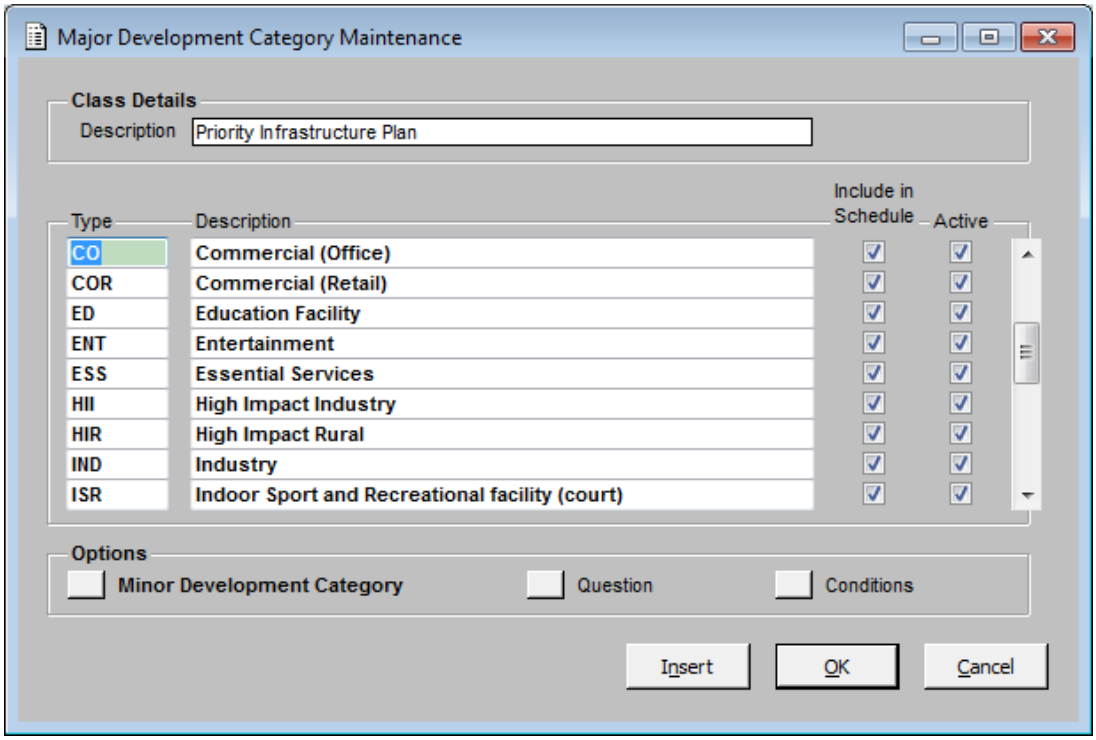
Development Category

Major Development Categories
Major Development Categories may be used to further describe an Application. The Categories may be used for reporting and statistical purposes. These categories are User Definable and may be used to identify Applications that may be of a Residential, Industrial or Recreational Category.
Minor Development Categories
For each Major Development Category, an unlimited number of minor categories may be established. For example the Major Development Category of "Residential" may have minor categories such as "Single Dwelling", "Swimming Pool", "Pergola", "Unit", "Townhouse" and so on.
This parameter is used to establish various categories, which may be applied to an Application.
The Development 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 Development Category Maintenance Form

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

NOTE: - Conditions are also able to be assigned to the Major Development Category. When the Major Development Categories are used in Application Maintenance, in Application Entry, Change Application Type or inserting a new Fee, the assigned Condition will be loaded onto the Application. The system will check for existing Standard Conditions and these Major Development 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 Development Category Maintenance Form

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

Type

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

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

Include in Schedule
If this flag is checked on then this Development Category will be included in the Contribution Plan Fee Schedule.
If this flag is not checked on then it will not be included in the Contribution Plan Fee Schedule.

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

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

Options - Minor Development Category

Pressing this button will display the Minor Development Category Maintenance form.
Minor Development Categories are assigned at the individual Major Category level.
Ensure focus is on the appropriate Major Development 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.

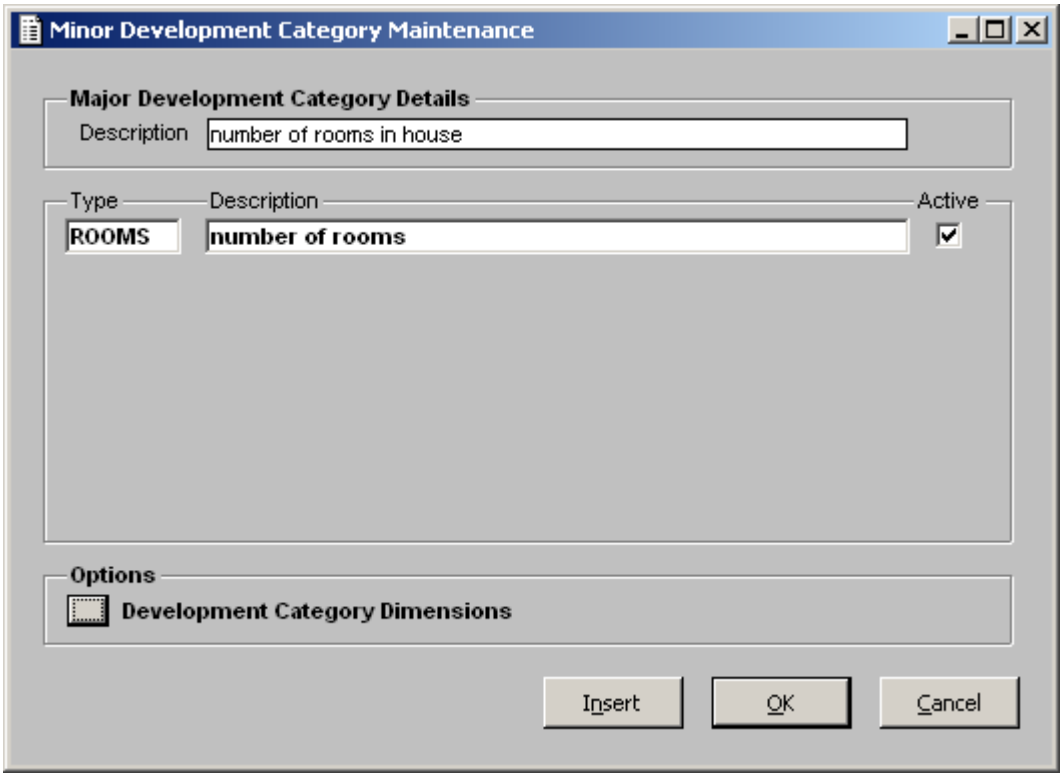
Options - Conditions

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

NOTE: - When the Major Development Categories are used in Application Maintenance, in Application Entry, Change Application Type or inserting a new Fee, the assigned Condition will be loaded onto the Application. The system will check for existing Standard Conditions and these Major Development 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 Development Category Maintenance Form

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



Minor Development Category Maintenance Form

Major Development Category Description

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

Type

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

Description

This field contains the description of the Minor Development Category.
This field is mandatory.

Active

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

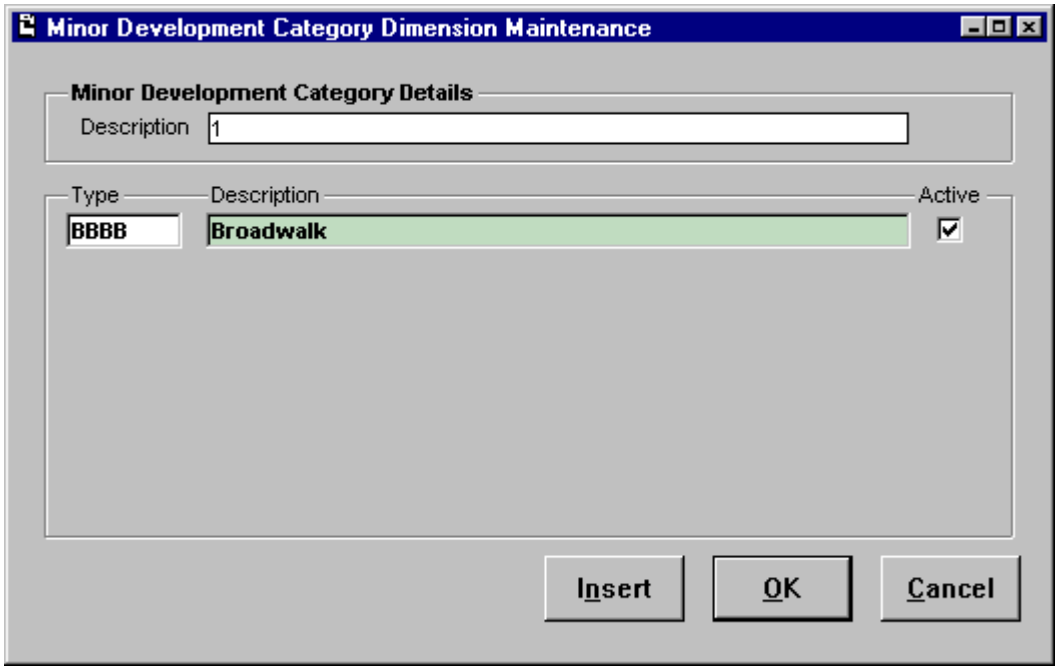
If this box is checked off then the Minor Development Category is no longer available to the system. Any existing Applications with this Minor Development Category will remain as entered. The Minor Development Category will no longer be available for addition to Applications.

Options – Development Category Dimensions

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

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



Minor Development Category Dimension Maintenance Form

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

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

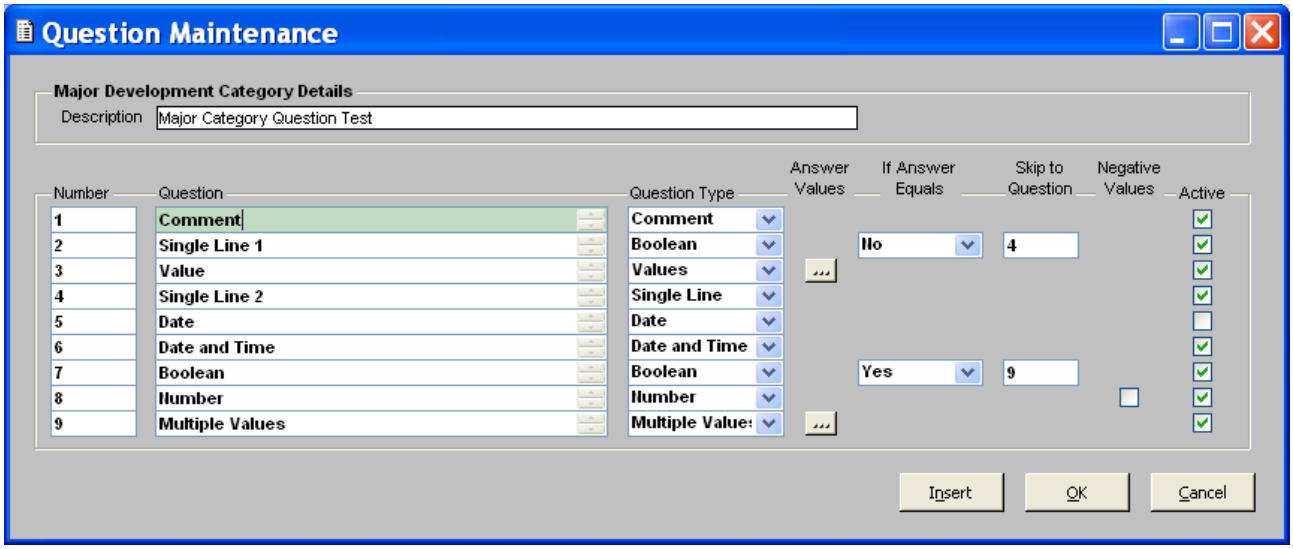
Description
This field contains the description of the Minor Development Category.
This field is mandatory.

Active
This field if checked allows the Minor Development Category Code to be used. If unchecked, this Minor Development Category Code will not be available to Lodge Applications against.

Question Maintenance Form

The Question Maintenance form allows the defining of Questions that can be displayed and updated from within the Development Category maintenance within Application 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 Development Category Details - Description

This field contains the description of the Major Development Category to which Minor 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 (50 freeform 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)

Negative Values

If the entry of the Number can be negative then this flag should be set ON

Boolean Type Questions

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.

Value Type Questions

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'.

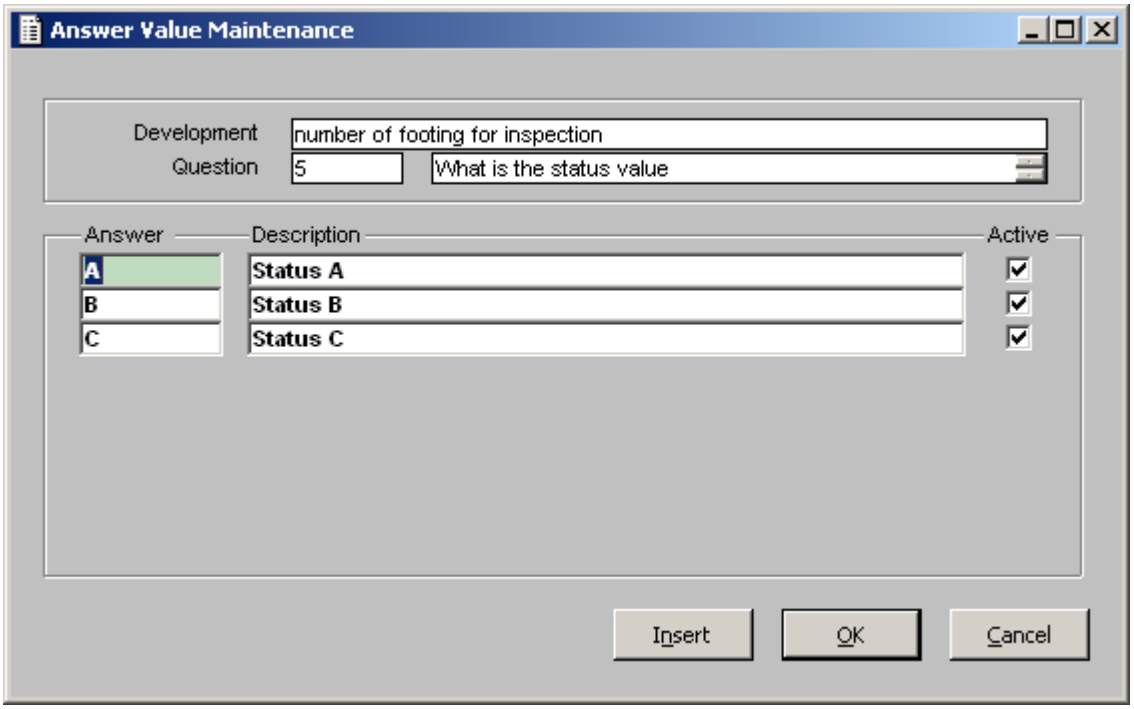
To enter the scenario 'If the Answer to Question 2 is YES skip to Question 5" the User would check on the If Answer Equals 'YES' dropdown at Question 2. and then enter 5 in the skip to field.

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.

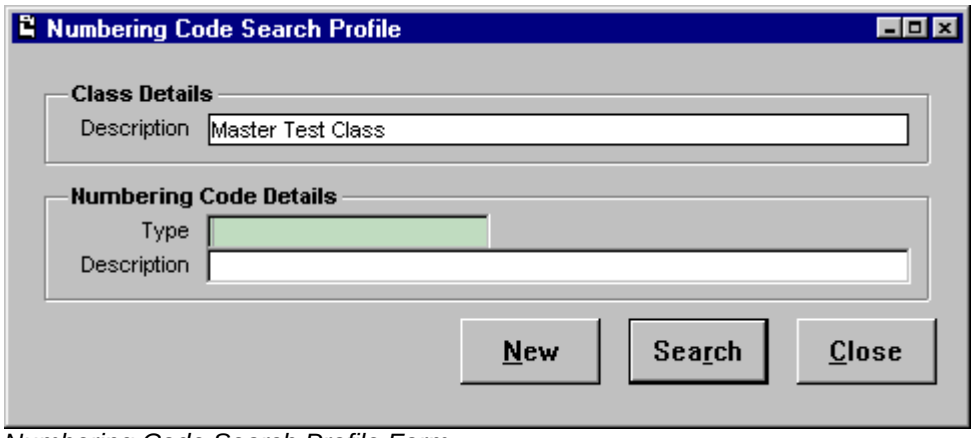
The Active Flag is used to signify that the particular Answer Value is available for use. If no longer required the Active flag can be flagged off thus stopping the further selection of the field.

Numbering Code

Application Numbering Codes allow for the nomination of a number sequence for each Application Code in the specific year, eg.
Building Applications may have a Code of 'BLD', starting at Number 1 in the year 1998.
Development Application may have a Code of 'DEV' starting at Number 1000 in the year 1998.
The sequence of each of the components in the Application Number , as displayed on screen, is also determined by this option. The sequence can be formatted for display by Application Number, followed by year and type of Application, or a combination of these components and each component separate by either a slash or dash.

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

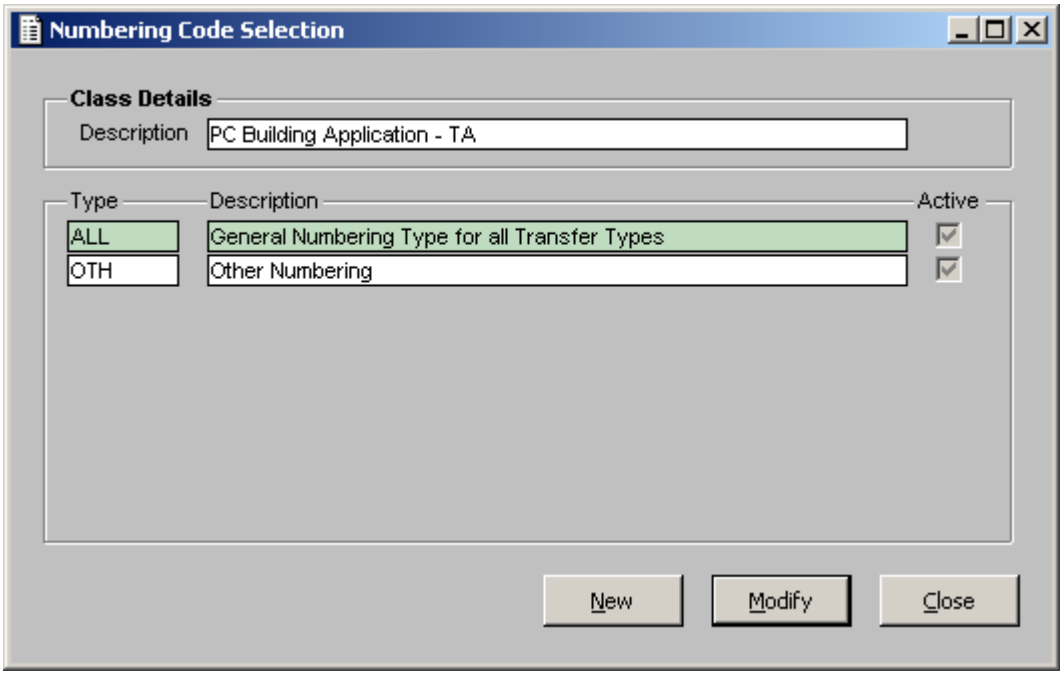
Class Details

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



Numbering Code Selection Form

Class Details
This field describes the Class selected.

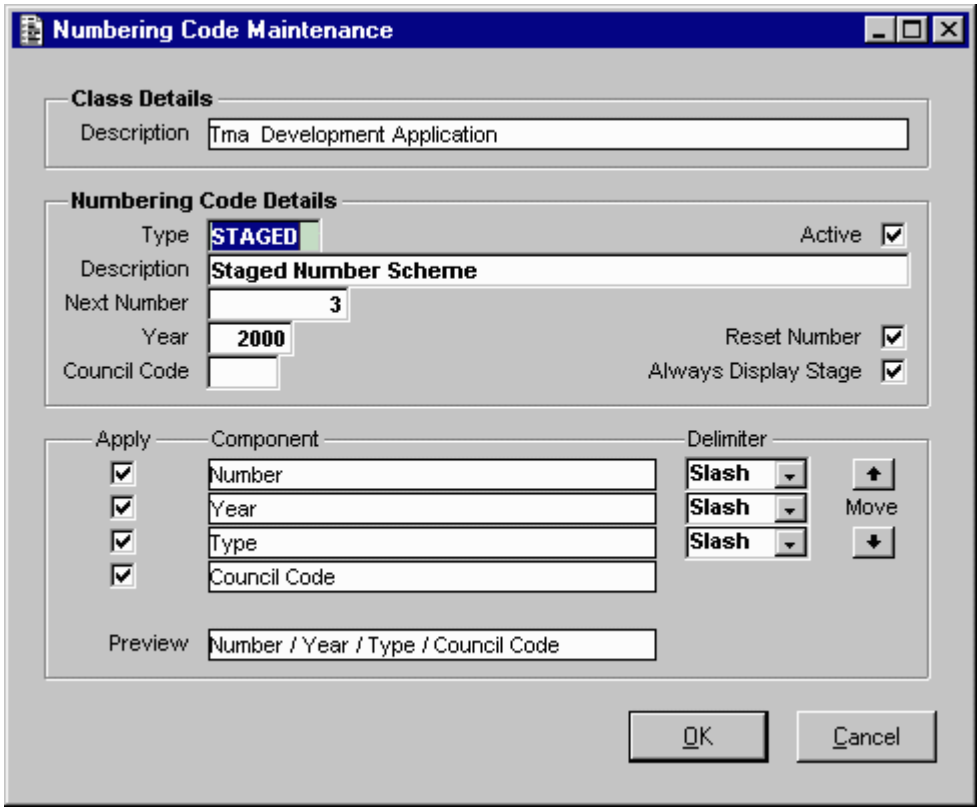
Type
This field shows the Code give to the Numbering Scheme

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 Applications against.
The forms offer a New button and a Modify Button. The New Button may be selected to create a New Numbering Code whilst the Modify Button will allow the modification of an existing Numbering Code.

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

The Class Details Field is a full description of the Class currently being accessed.

Numbering Code Details - Type

The Type field details the Class and the Description Field gives the full detailed description of the Class.

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 an Application will be allocated when it is lodged.

Numbering Code Details - Year

This field details the year an Application will be allocated when it is lodged.

Numbering Code Details - Council Code

The Council Code Field holds the actual number allocated to the Council

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.

Always Display Stage

The Always Display Stage flag is used to define how the formatted application number is to display. If this field is flagged on then Applications created with this numbering code will display the formatted application number with a staged segment. If the field is flagged off then only when a staged application is generated will the staged segment of the formatted number be displayed.

Apply, Component and Delimiter

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.
A Preview Box is displayed to show how the selected Numbering Code will display.

Application Type

Although these codes should be created last of the above parameters, they determine how an application will be identified and also can be used as a selection method for reporting. Hence, a structure should be determined before entering all parameters and codes.
The Application Type is primarily used to automate the loading of data onto an Application when it is lodged. Once established a minimum amount of data entry is required at Lodgement.
For each Application Type you may select to automatically load the following data items at lodgement:-

- Consents
- Fees
- Components
- Overriding responsibility
- Application Dimensions
- Development Dimensions
- Subdivision Dimensions

The Application Type also determines the:-

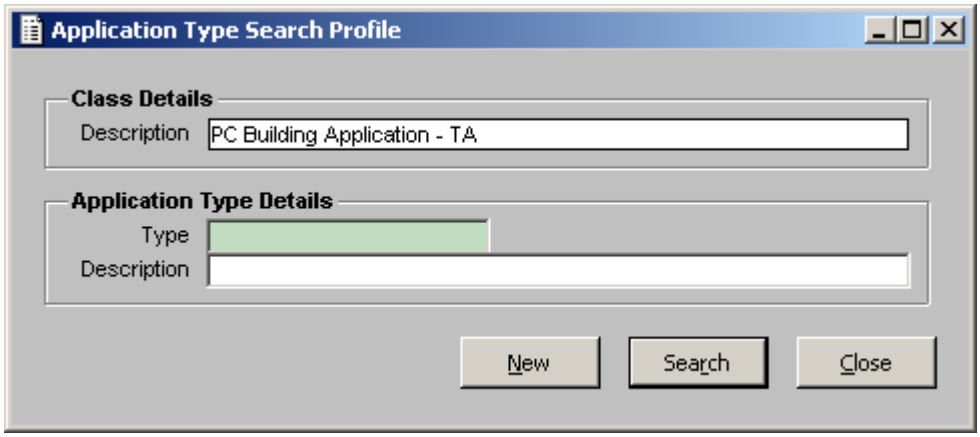
- Summary Print form
- Expiry Date Calculation rules
- Numbering Code
- Fee enquiry print form (not yet implemented)
- Default processing group

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

Application Type Search Profile Form

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



Application Type Search Profile Form

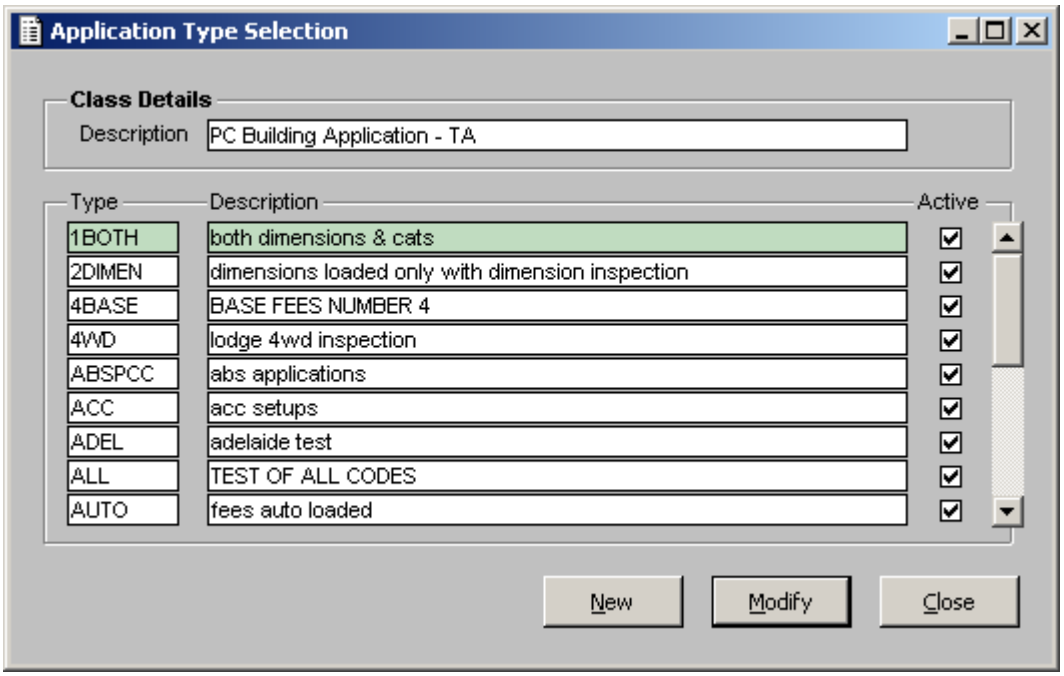
Class Details
This field contains the description of the Class of Application to which you are assigning An Application Type. This field is display only and may not be maintained.

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

Description
This field allows for the entry of a fuller description of the Application 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 Application Type Selection Form.

Application Type Selection Form

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



Application Type Selection Form

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

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

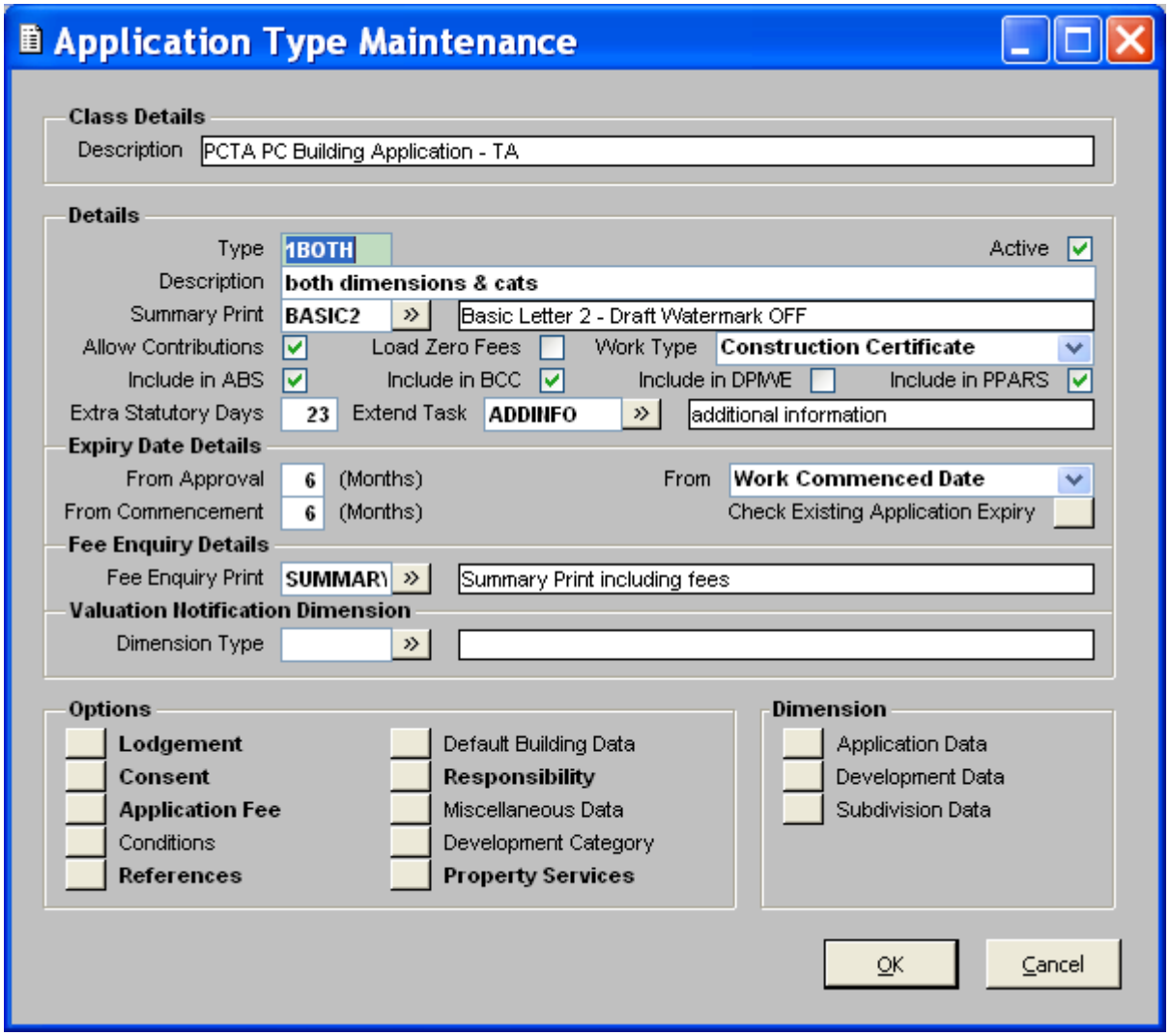
Description
This field holds the fuller description of the Application Type.

Active Button
On this form the Button is in Display Mode only and cannot be maintained.

Clicking on the New Button from the Application Selection Form will move to the Application Maintenance Form.

Application Maintenance Form

The Application Type Maintenance Form allows for the entry of a new form, or modification for an existing one.



Application Type Maintenance Form

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

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

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

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

Summary Print/Description

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

Allow Contributions
This field can be checked on if Contributions are to be accepted against this Application Type. If you do not wish this Application Type to have Contributions entered against it, leave this box unchecked.

Include in ABS
This field should be checked if the Application Type is to be included in the Australian Bureau of Statistics Reporting figures. Leave unchecked if this Application Type is not required to be included in these figures.

Include in BCC

This field should be checked if the Application Type is to be included in the Building Commission Control Reporting figures. Leave unchecked if this Application Type is not required to be included in these figures.

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 Application 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.

Include in DPIWE
This field should be checked if the Application Type is to be included in the Department of Primary Industry Reporting figures. Leave unchecked if this Application Type is not required to be included in these figures.

Include in PPARS
This field should be checked if the Application Type is to be included in the Planning Permit Activity Reporting System. Leave unchecked if this Application Type is not required to be included in this process. This is an authorised function and this field will not display if the authority is not active.

Planning Permit Activity Reporting (PPARS) (Formerly Dept. Of Sustainability And Environment Reporting)

**** All Victorian Sites ****

This enhancement covers the requirements documented in the PPARS Reporting Enhancements Functional Specification.

The enhancements are summarised as follows:-

- All visible references to 'DSE' are changed to 'PPARS'
- The existing batch control form now allows multiple selections for Further Information, Public Notification and Referral Tasks
- New features provided to enable the submission of Correction and Deletion Returns

Application Data Maintenance

The Application Data Maintenance form has been modified to include a new *Amended Application Date* field to enable the date the Application was amended to be recorded, and a new *Correction to PPARS* check box to enable an Application to be flagged for inclusion in a Correction Return:-

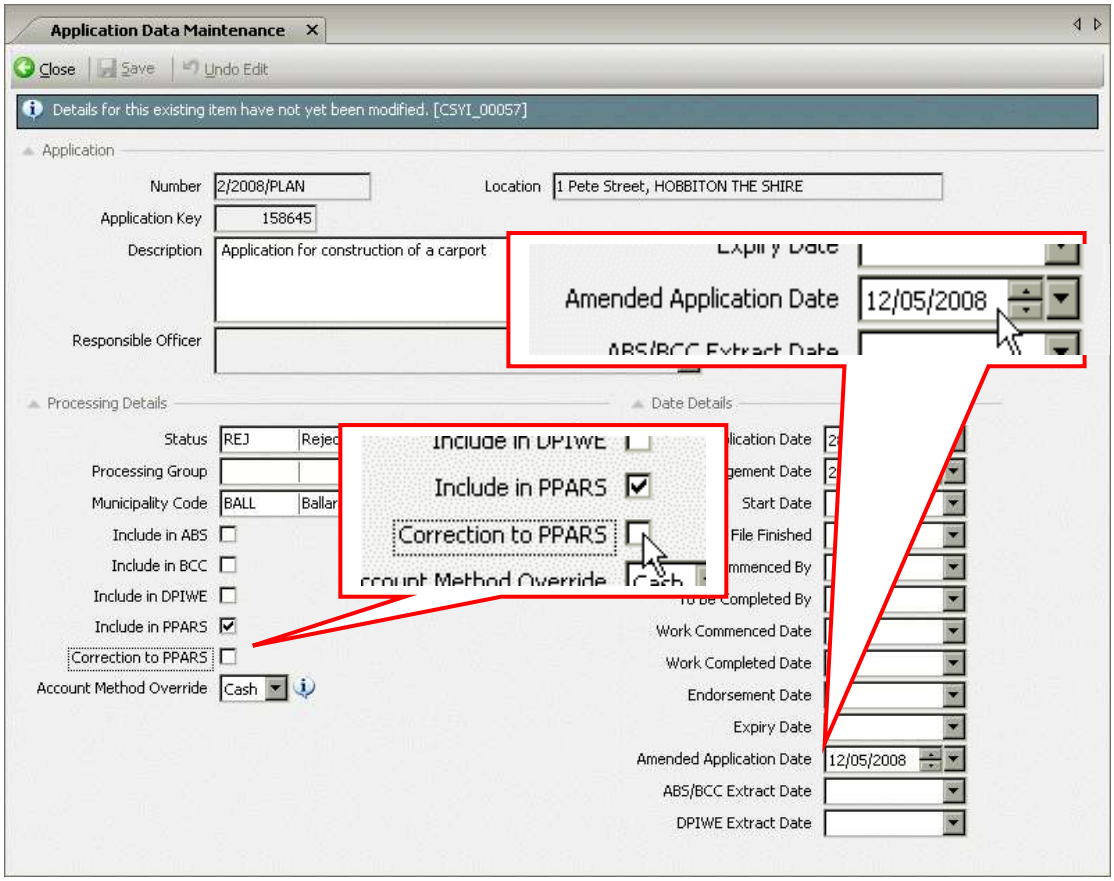


Fig 1 – Application Data Maintenance (Form LAPG1070)

The *Correction to PPARS* check box is checked on or off by the operator to indicate whether or not the Application has changes that must be notified to PPARS in a Correction Return. Note that the check box is only enabled if the *Include in PPARS* check box is checked on.

The *Amended Application Date* is simply entered by the operator. If a date is entered in this field and saved to the database, it will be shown in the Dates field on the Application. This field has no bearing on PPARS processing, but will allow sites to set up a Workflow action at the relevant stage of the Application Lifecycle so as to trigger the Application to reset the Clock to Zero. The workflow action of UPDTIMEATT would need to be invoked for this.

Summary form:-

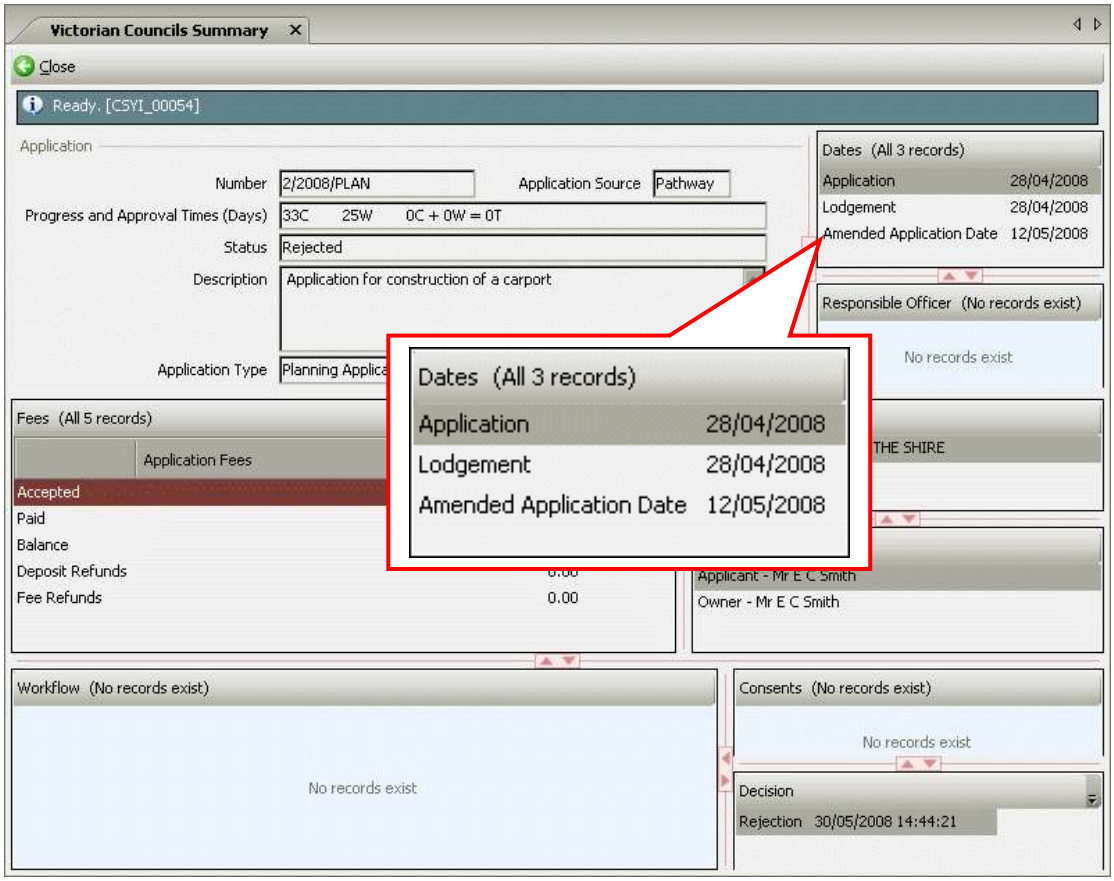


Fig 2 – Application Summary (Form LAPG6900)

These changes have also been made to the corresponding thick client forms.

Changes to Existing PPARS Return (Full Return)

When the option *Applications* ► *Batch* ► *Planning Permit Activity Reporting (PPARS)* is selected from the menu, a message will be displayed prompting the operator to select the type of PPARS Return to be processed:-

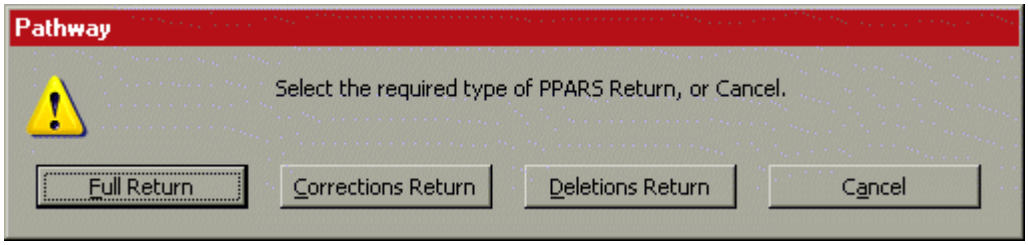


Fig 3

If Cancel is chosen, no further processing will take place, and the operator will be returned to the menu.
If the operator chooses Full Return, Corrections Return or Deletions Return, the Class pop-up form will appear; following selection of the appropriate Application Class, the appropriate control form for the type of PPARS Return will be displayed (note that, as none of the *Application* ► *Batch* menu options have yet been converted to the thin client, the features described in the remainder of these notes are available in the thick client only).

If Full Return was chosen, the existing PPARS control form will be displayed:-

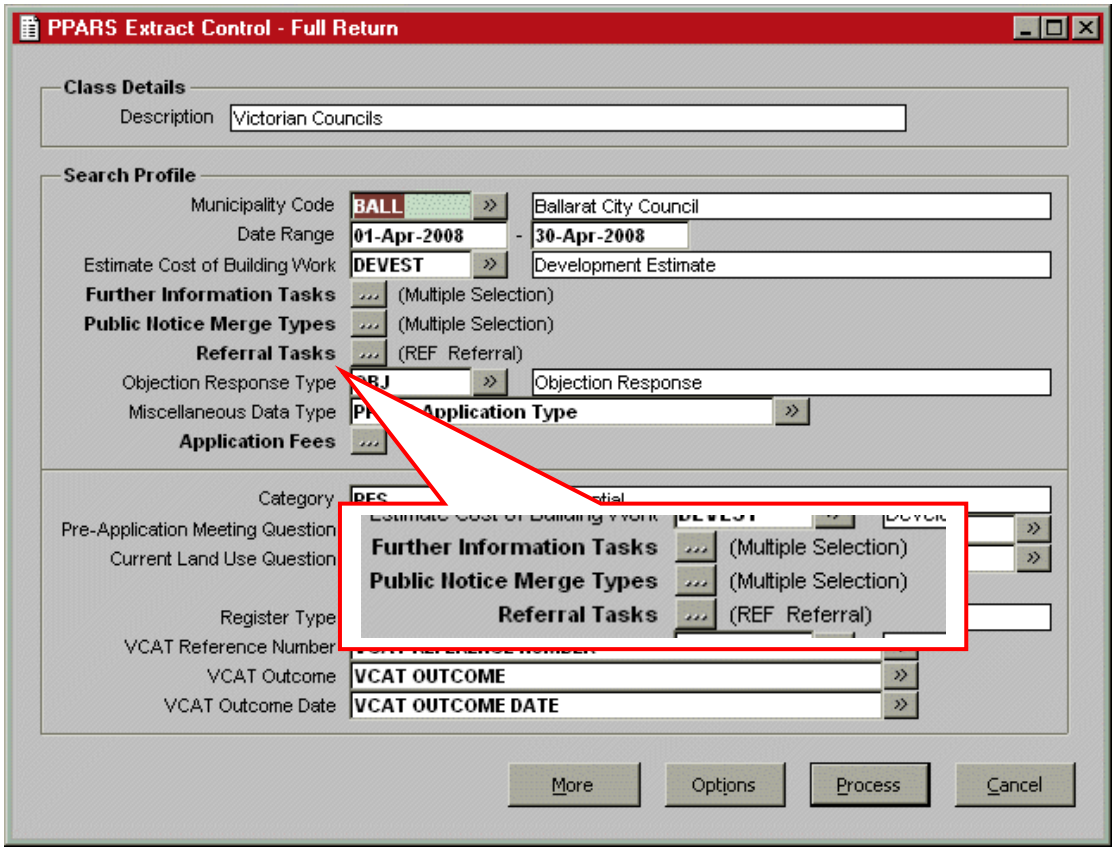


Fig 4 – PPARS Extract Control – Full Return (Form LAPC7740)

The pop-up controls for Further Information Task, Public Notice Merge Type and Referral Task, which only allowed selection of a single item, have been replaced with detail buttons each of which will call a select/remove form which will allow the selection of multiple items.

Note – Some sites have used the Municipality Code in the Application Parameters as a repository for other data eg Ward Codes. The Municipality Code on this form should match the Municipality Code that the DPCD recognise as the Council Code.

The label to the left of each button will indicate that one or more items have been selected by appearing in **bold**. The label to the right of each button will indicate which item has been selected if only a single item was selected, or appear as *(Multiple Selections)* if more than one was selected.

The detail buttons will call the following forms:-

Button	Form
Further Information Tasks	PPARS Extract Control - Further Information Tasks
Public Notice Merge Types	PPARS Extract Control - Public Notice Merge Types
Referral Tasks	PPARS Extract Control - Referral Tasks

These forms are standard select/remove forms, all similar in appearance and behaviour. The PPARS Extract Control - Referral Tasks form is shown below:-

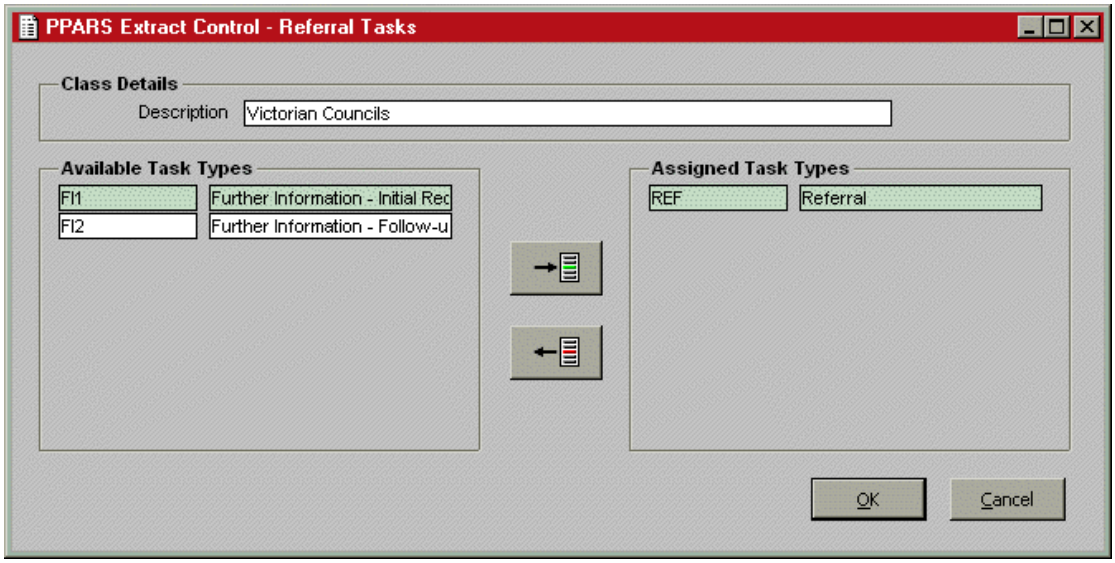


Fig 5 – PPARS Extract Control – Referral tasks (Form LAPG7742)

The operator will select the desired items and press OK to return to the Full Return control form.

Once all parameters have been entered on the control form (see *Fig 4*) the Process button is used to submit the job in the usual way.

The extract process will now record more detailed information (including any error messages) in the Processing Summary, as well as in the message frame. The Processing Summary for a batch job may be displayed from the Processed Job Print or Processed Job Deletion form:-

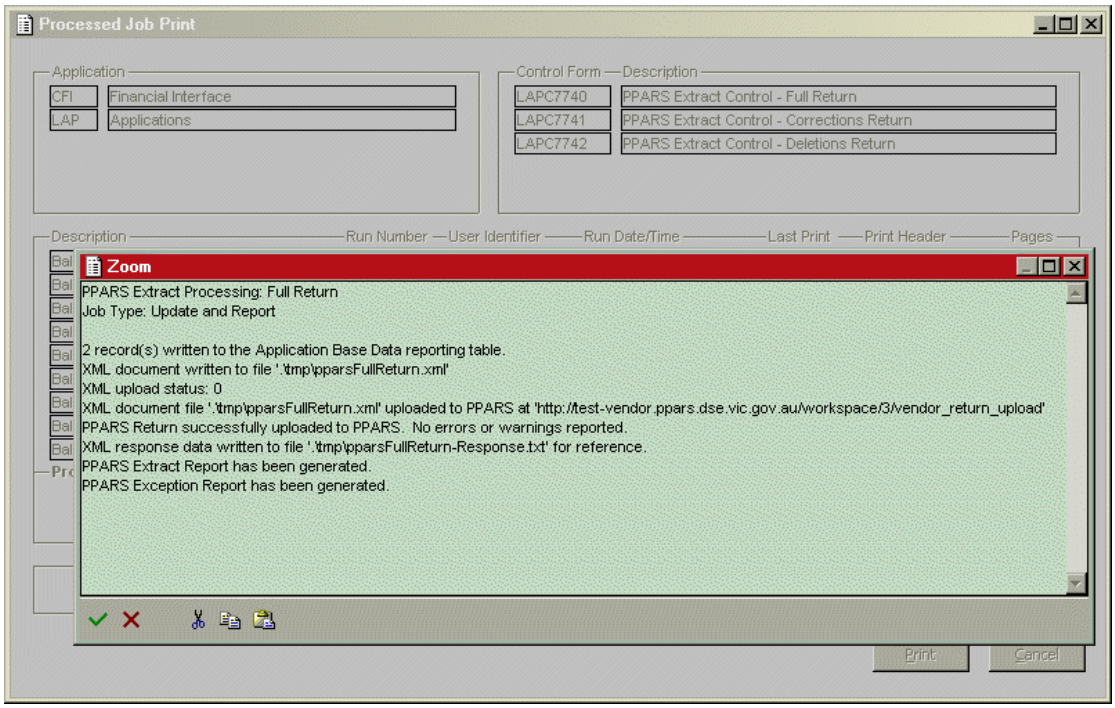


Fig 6 – Processed Job Print form showing the Processing Summary in the Zoom window

Additionally, if the User ID of the operator has an e-mail address defined, the contents of the Processing Summary will be e-mailed to that address.

PPARS Correction Return

If Corrections Return was chosen when the option *Applications ► Batch ► Planning Permit Activity Reporting (PPARS)* is selected from the menu, the new PPARS Extract Control – Corrections Return form will be displayed:-

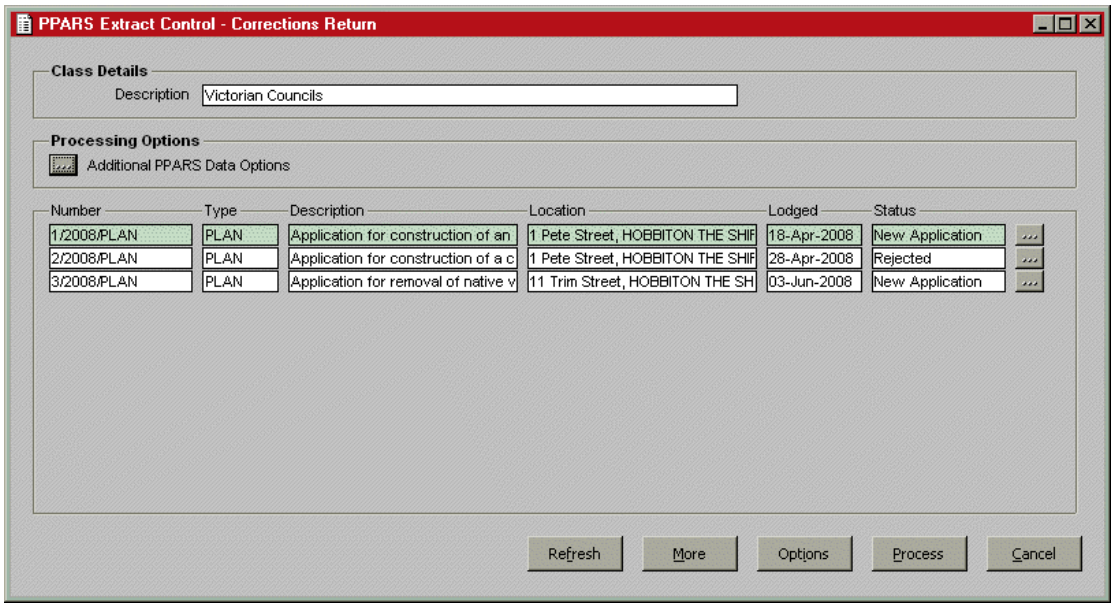


Fig 7 – PPARS Extract Control – Corrections Return (Form LAPC7741)

The form will display all Applications for the selected Class where the *Correction to PPARS* check box is checked on.

The detail button to the right of each Application may be used to invoke Application Maintenance for the Application. If while in Application Maintenance the operator checks off the *Correction to PPARS* check box, the Application will be discarded on returning to this control form, enabling the Application to be excluded from the Correction Return.

The Refresh button may be used to refresh the list of Applications if desired. The More, Options, Process and Cancel buttons all behave in the same manner as the corresponding buttons on the Full Return control form.

The *Additional PPARS Data Options* detail button in the Processing Options area frame calls the PPARS Extract Control - Additional Options form, enabling the controlling options for the PPARS Return to be set.

On return from the PPARS Extract Control - Additional Options form, the label for the *Additional PPARS Data Options* detail button will appear in **bold** if the additional options have been set.

The PPARS Extract Control - Additional Options form appears as follows:-

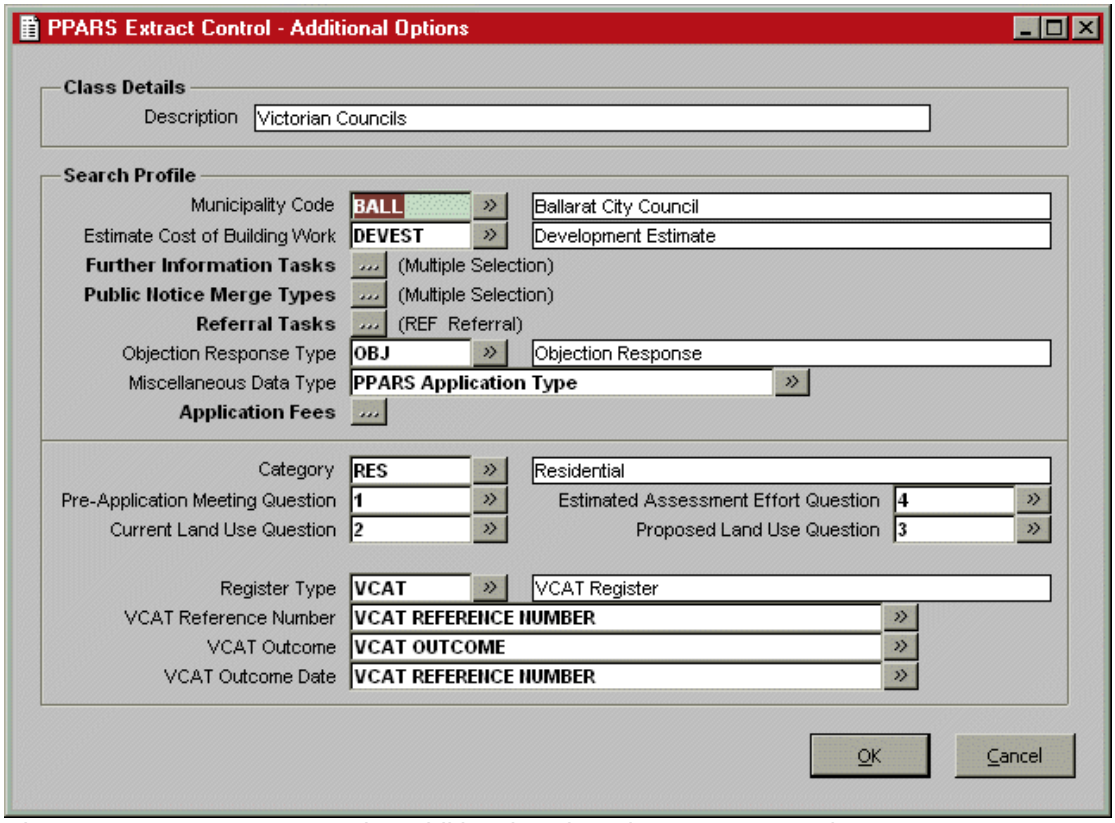


Fig 8 – PPARS Extract Control – Additional Options (Form LAPG7744)

This form is essentially identical in appearance and behaviour to the Full Return control form.

Once all parameters have been entered, the Process button on the control form (see *Fig 7*) is used to submit the job in the usual way.

The extract process will record its progress (including any error messages) in the Processing Summary, as well as in the message frame. If the User ID of the operator has an e-mail address defined, the contents of the Processing Summary will be e-mailed to that address.

If the extract process completes successfully, the *Correction to PPARS* flag on each Application will be turned off, and the Applications will no longer be displayed when the Control form re-appears.

PPARS Deletion Return

If Deletions Return was chosen when the option *Applications ► Batch ► Planning Permit Activity Reporting (PPARS)* is selected from the menu, the new PPARS Extract Control – Deletions Return form will be displayed:-

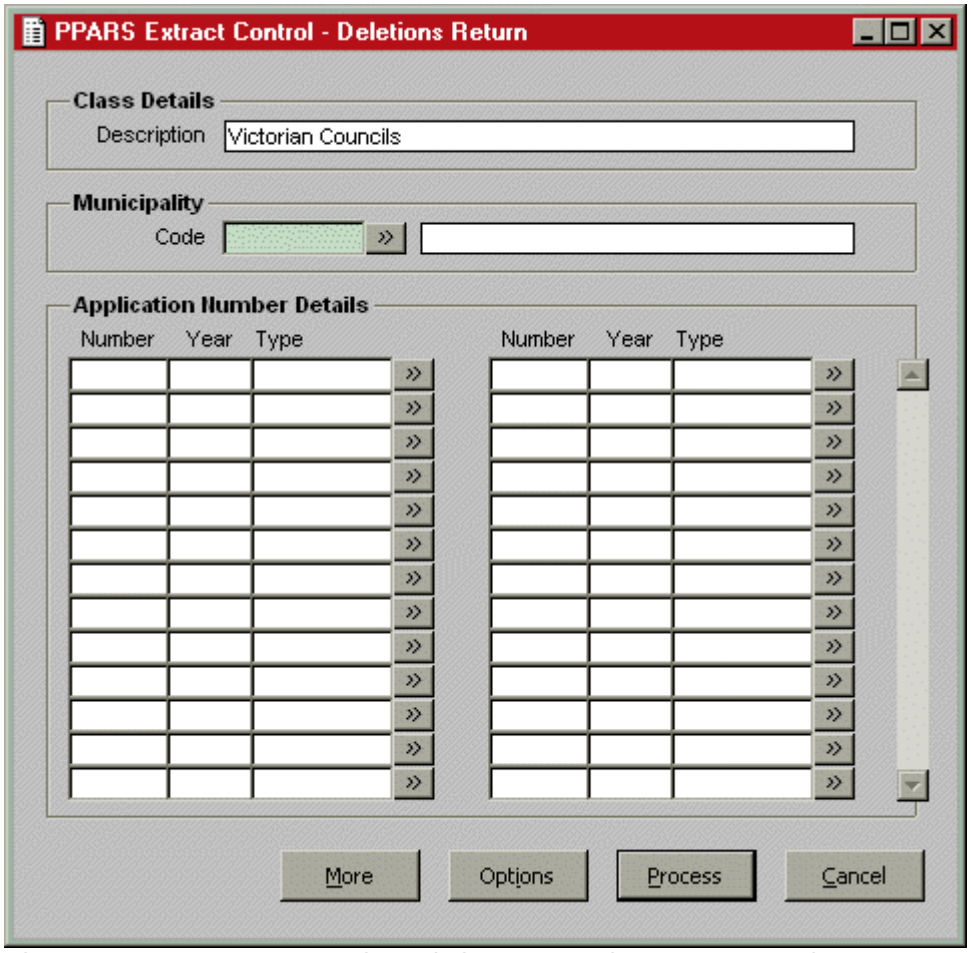


Fig 9 – PPARS Extract Control – Deletions Return (Form LAPC7742)

Use the Municipality pop-up control to select the appropriate Municipality code.

The form allows entry of Application Numbers that are to be deleted from PPARS. At least one Application Number (consisting of a group of fields for the Number, Year and Application Type) must be entered. The Application must exist in Pathway and must have been flagged to allow PPARS reporting. The PPARS server will also validate that the Applications exist in PPARS when the Return is uploaded. The Tab key may be used to move to the next Application Number field group after entering an Application Number. If the Application Number has been entered in the last field group, pressing Tab will cause two new empty field groups to be added at the bottom of the form, with the existing field groups being automatically scrolled upwards.

The More, Options, Process and Cancel buttons all behave in the same manner as the corresponding buttons on the Full Return control form.

Once all Application Numbers have been entered, the Process button is used to submit the job in the usual way.

The extract process will record its progress (including any error messages) in the Processing Summary, as well as in the message frame. If the User ID of the operator has an e-mail address defined, the contents of the Processing Summary will be e-mailed to that address.

If the extract process completes successfully, the *Include in PPARS* and *Correction to PPARS* flags on each Application will be turned off.

If for some reason this particular Application was ever required to be re-sent to PPARS, users would need to check on the PPARS flag in the Application Data Maintenance form.

Additional Notes:

The Amended Applications Checkbox has been removed from the Control form.

As all Victorian Sites have been canvassed and advised Infor that they now use the Amended Application Option via Lodgement to indicate that a Permit has been amended, the following rules will apply.

We automatically assume that an Application is a "new Application" and would set the Application Type in the XML to "1" but before populating the XML with this value, the program will check the Application Suffix value. If this has a value, typically '/A' or '/B' etc, then the Application Type will be set to '2', i.e.: an Amended Permit.

An additional check will then be made for a Miscellaneous Data Value on the Application that matches the selected Miscellaneous Data Type set on the PPARS Control form. If such an item is found, its value will be used to override the setting of the PPARS Application Type.

The value of the Miscellaneous Data item should be a '1', '2' or '3' as required by PPARS.
Using this mechanism gives users some control over the determination of the Type of the Application mainly for Combined Applications.

Extra Statutory Days
This field allows for the addition of extra days if required.

Extend Task
This field allows selection of the task type to be assigned for extra days.

Description of Extend Task
This field is the description of the extended task.

Work Type
The Work Type field is used in the production of the Long Service Levy information for NSW. This field defaults to ‘Not Applicable’ but can be changed to the relevant Work Type for the Application Type. The available Work Types are :-

- Building Application
- Development Application
- Construction Certificate
- Complying Development Certificate
- Contract
- Others

This field must be set in the Application Type otherwise it will not be extracted into the extract file for the Long Service Levy.

Expiry Date Details From Approval
This field is used to enter the number of months that the Application Type will be current for.

From Commencement
This field is used to enter the number of months from Commencement that the Application Type will be current for.

From
This field is used to decide how the Expiry Date will be calculated. The two options are from the Work Commencement Date or from the Final Decision Date.

Fee Enquiry Print

This field details the name of the Merge Type and its description that will be used as the form to print a Fee enquiry. The Pop Up form alongside the Merge Type field details out to Word Processing Options.

Valuation Notification Dimension – Dimension Type

To enable a 'value' to be returned from Applications and displayed in Notifications in Valuations, the 'Valuation Notification Dimension' need to be defined.
This allows a Dimension Type to be entered or selected from the pop-up.
This Dimension would be that normally used to manage the 'estimated value' of building work being undertaken on the Application.

Once this is defined in the parameters, entering a Work Completed Date for an Application that is linked to a Property with a Valuation record, the Notification generated in Valuations will reflect the 'value' of that Dimension.

Options - Lodgement

The Lodgement Options Button allows specific options to be set up to speed up the Lodgement Process. This is detailed further in this document.

Options - Default Building Data

The Default Building Data option allows the defining of default Building Classification information that can be displayed during Lodgement.

Options - Consents

The Consents Button allows specific consents to be assigned to this Application Type. This form is detailed further in this document.

Options - Responsibility

This Responsibility Button allows specific Responsibilities to be assigned to this Application Type.

Options - Application Fees

This Application Fees Button allows specific fees to be assigned to this Application Type. This form is detailed further in this document.

Options - Miscellaneous Data

The Miscellaneous Data Button allows specific Miscellaneous Data to be assigned to this Application Type.

Options - Conditions

The Conditions Button allow specific Conditions to be added to the Application Type.

Options – References

The References Button allows the user to select of one or more references to be loaded at application lodgement.

Options - Development Category

The Development Category Button allow specific Development Categories to be added to the Application Type.

Options – Property Services

The Property Services Button will allow specific Property Services to be added to the Application Type.

Dimension - Application Data Button

This Applications Data Button allows for specific information relating to Application Data to be added to this Application Type. This form will be detailed further in this document.

Dimension - Development Data Button

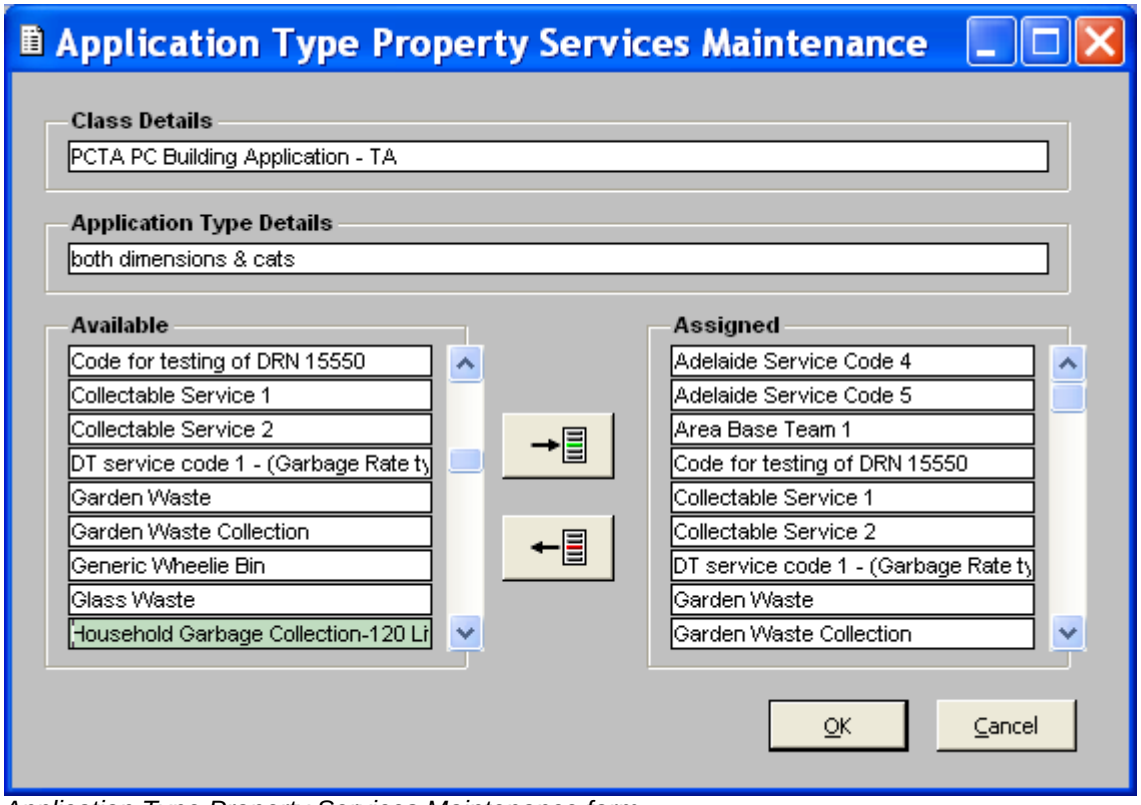
The Development Data Button allows for specific information relating to Development Data to be added to this Application Type. This form will be detailed further in this document.

Dimension - Subdivision Data Button

The Subdivision Data Button allows for specific information relating to Subdivision Data to be added to this Application Type. This form will be detailed further in this document.

Application type Property Services Maintenance

Property Service Codes may be assigned to Application Types via a new form Application Type Property Services Maintenance (accessed from a new detail button labelled ‘Property Services’ in the Options area frame of the existing Application Maintenance form via the *Applications* ► *Application Parameters* menu option).



Application Type Property Services Maintenance form

Application Type Property Services Maintenance – Class Details
This is the Class of Application that the Property Service is applicable.

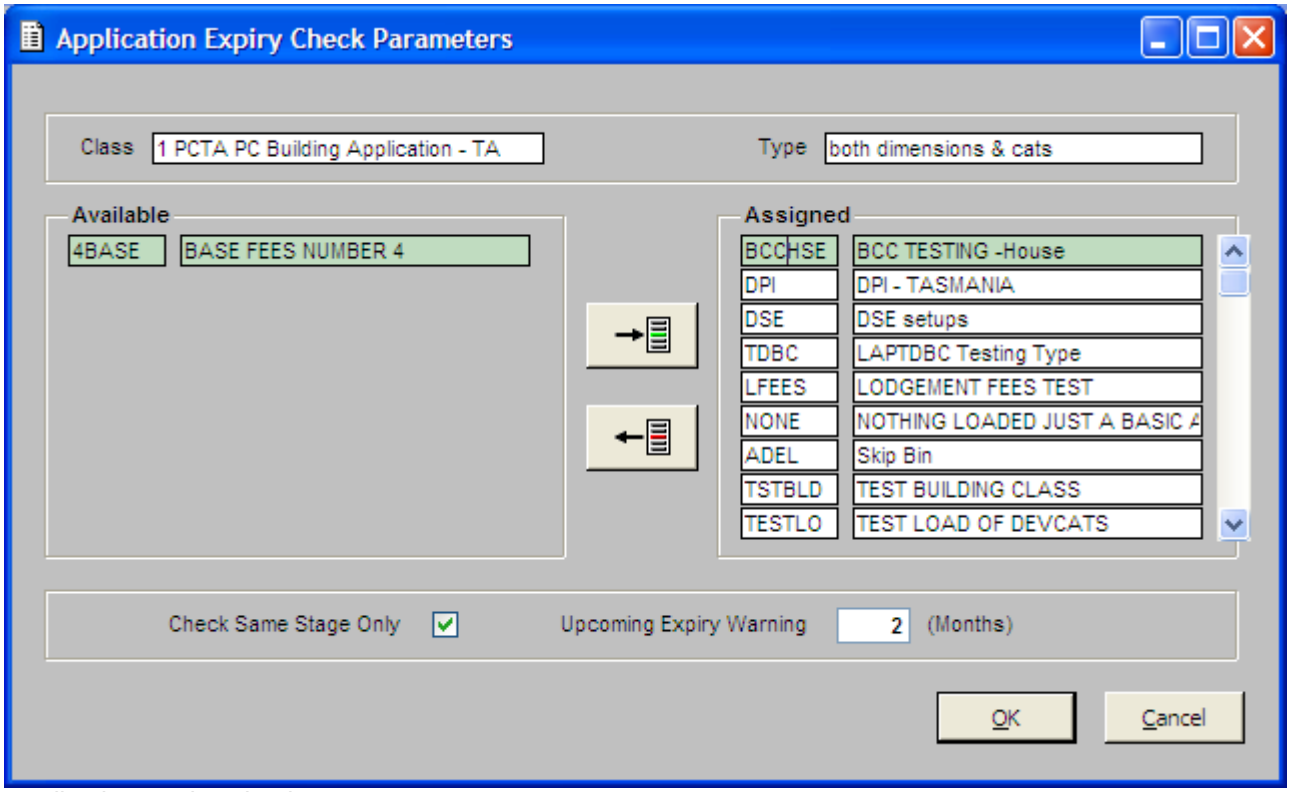
Application Type Property Services Maintenance – Application Type Details
This is the Application Type that the Property Service is applicable, below this is a list of Available Service Maintenance Types that are able to be selected/deselected by moving them from the Available side to the Assigned side or vice bersa.

Check Existing Application Enquiry

New optional checking has been added to the Application Lodgement and Application Issuing processing, allowing users to prevent the lodgement or issuing when there is an expired Application associated with the property, parent property, or sub-property of the selected Application.

This check is controlled using the Application Expiry Check Parameters form accessible from the Application Type Maintenance form using the new button: "Check Existing Application Expiry".

The user is then able to assign which of the Application Types that they want the system to check for an Expiry Date against an Application for the selected property.



Application Expiry Check Parameter Form

Application Expiry Check Parameters – Class
This display only field indicates which Class Type this Application Expiry refers to.

Application Expiry Check Parameters – Type
This display only field indicates which Type this Application Expiry refers to.

Application Expiry Check Parameters – Available/Assigned
This is a list of available application types and descriptions that can be made available to include in the Expiry Check function. By selecting any available parameter and clicking on the arrow the chosen application type can be included in the available list.

Application Expiry Check Parameters – Available/Assigned
This is a list of application types that have been assigned to be included in the Expiry Check Function. Should they no longer be required they can be highlighted and de-assigned.

Application Expiry Check Parameters – Assigned
This is the list of assigned application types and descriptions.

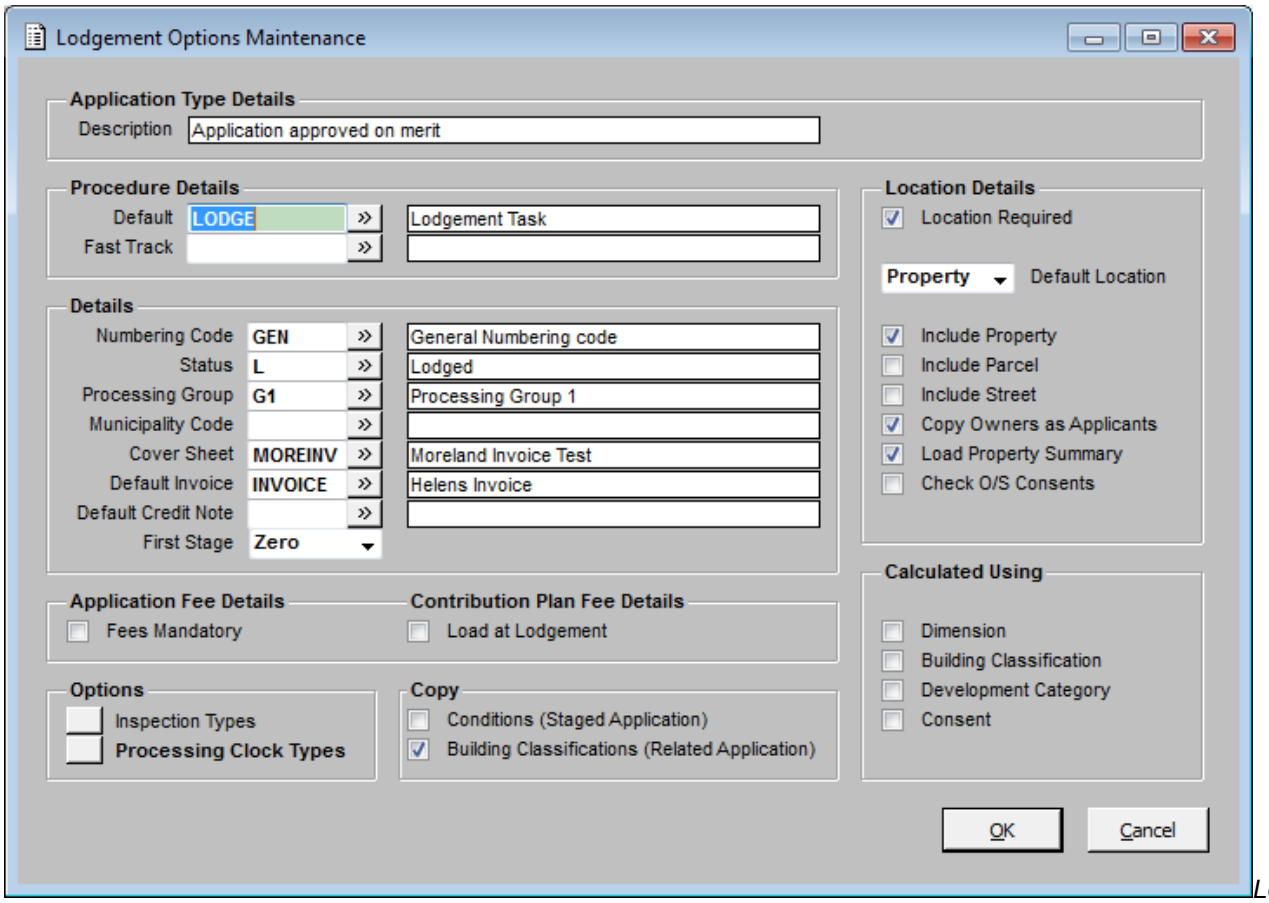
Application Expiry Check Parameters - Check Same Stage Only
When flagged, this parameter will only check Applications with the same Staged or Amended level (note that Applications that are neither Staged nor Amended are counted as being a different level from those that are.)

Application Expiry Check Parameters - Upcoming Expiry Warning
Defines how many months ahead the Lodgement process should check for Applications that will soon be expiring. Both the Lodgement and Issuing processes will prevent processing of any Application where an Expired Application has been found in the property family.

In addition the Lodgement process will issue a warning if any Application is about to expire in the "Upcoming Expiry Warning Period".

Lodgement Options Maintenance Form

The Lodgement Options Maintenance allows for specific parameters to be entered to speed the actual Lodgement Process.



Lodgement Options Maintenance Form

Application Type Details - Description

This field details the description of the Application Type.

Procedure Details - Default

This field may detail the specific Procedure Code that has been defined as being the Default Procedure Code and a description of this Code.

Procedure Details – Fast Track

These fields may detail the specific Procedure Code used to Fast Track an Application and its description.

Details – Number Code

The Number Code allows the selection of the Numbering system that is to be used for this Application Type. If the Code is not known then the Pop Up Button can be used to access a list of available Number Systems. The same Numbering Code can be used over one or many Application Types.

Details - Status

The Status field allows the entry of the Status that will be applied to the Application when this Type is lodged through the Lodgement process. If the Status Code is not known then the Pop Up Button can be used to display a list of valid Status Codes that can be used.

Details – Processing Group

If a Processing Group is to be assigned to the Application when it is Lodged, then the Default Processing Group can be entered here and it will automatically be assigned to the Application when it is entered. This Processing Group is only a default and can be overridden at the time of entry of the Application. When using Processing Groups it is possible to allocate Responsible Officers to each of the Processing Groups.

Details - Municipality Code

The Municipality Code that is assigned here will automatically be placed on the Application when this Application Type is being lodged. This can be written over if another Municipality Code exists.

Details – Cover Sheet

The Cover Sheet Field lists the name of the Merge Type to be used when printing a Cover Sheet for the Application.

Default Invoice

This allows for a default invoice merge type to be created against an application type. The default may be overridden at the time of processing.

It is recommended that a default invoice merge type is created here.

Default Credit Note

This allows for a default Credit note merge type to be created against an application type. The default may be overridden at the time of processing.

It is recommended that a default credit note merge type is created here.

Details – First Stage

The First Stage field can be set to either Zero or One. This setting determines were the Staged Numbering will commence from. If set to Zero then when an Application is entered it will have the numbering starting from stage of zero and any staged applications created from then on will commence at one. If set to One then when an application is entered it will have the numbering starting from stage of one and any staged applications created from then on will commence at two.

When this parameter is set to One then the 'First Stage' field is displayed within lodgement and allows the user to tick on whether the Application is the first stage or not and therefore use the stage number of One.

Additionally when set to One the 'Default First Stage' field is displayed on this form to allow the User to set a Default setting for the field when it is displayed within the Lodgement process.

Details – Default First Stage

The Default First Stage field is only displayed on this form when the First Stage field has been set to One. Otherwise this field is not displayed.

This field allows the User to define the Default setting for the field within the Lodgement process. If this field is flagged on then when an Application is lodged the First Stage field on the Lodgement form will be flagged on automatically and the User will not have to remember to check the field on during entry.

If this field is not flagged on then the Fisr Stage field on the Lodgement form will not be flagged on either and it is up to the User to remember to check the field on if the First Stage is to be applied to the Application Number.

Application Fee Details – Fees Mandatory

If checked on this Field will ensure that Fees must be entered when the Application is Lodged.
If unchecked then Fees need not be entered at the time of Lodgement, but can be entered at a later date.
NOTE:
Any standard application fees attached to the Application Type will be automatically loaded at lodgement without the Fees Mandatory flag check on as long as the Calculated Using Dimensions boxes are not checked on.
If the Calculated Using Dimensions boxes are checked on then the Fee Mandatory box will be checked on and dimmed.

Contribution Fee Details – Load at Lodgement

If checked on this Field will ensure that Fees must be entered when the Application is lodged.
If unchecked then Fees need not be entered at the time of Lodgement, but can be entered at a later date.

Options – Inspection Types

If Inspections are to be loaded automatically when the Application Type is entered then the Inspection Type(s) can be entered using the Inspection Type Options. Once the Option button has been selected then the User is able to insert the required Inspection Types that are to be added with the lodgement of the Application.

Options – Processing Clock Types

When this button is pressed the user is taken to the Application Clock Type Maintenance Form. This form will determine which Processing Clocks are loaded for the current Application Type.

Copy – Conditions (Staged Application)
When lodging a Staged Application, this parameter will control the copy of Conditions from the selected Application to the Staged Application. As this flag is based on the Application Type, it applies to the Staged Application and not the selected Application. That is the Application Type selected on the Class / Type Selection form before the Lodgement screen.
For example if the User has selected the Lodgement Menu and Class A/ Type A and then selected the Staged Application option the 'Copy – Conditions (Staged Application)' setting would be taken from the Class A / Type A parameter and not the Class / Type of the Application being selected to be staged.
For new Application Types created, this flag is defaulted to 'On'.

Copy – Building Classifications (Related Application)
When lodging a Related Application, this parameter will control the copy of Building Classifications from the selected Application to the Related Application. As this flag is based on the Application Type, it applies to the Related Application and not the selected Application. That is the Application Type selected on the Class / Type Selection form before the Lodgement screen.
For example if the User has selected the Lodgement Menu and Class A/ Type A and then selected the Related Application option the 'Copy – Building Classifications (Related Application)' setting would be taken from the Class A / Type A parameter and not the Class / Type of the Application being selected to be related to.

If the 'Calculate Using Building Classification' field is also flagged 'ON' in the same Application Type as the 'Building Classifications (Related Application)' field is also flagged 'ON' then any Fees that are associated to the Building Classifications being copied will also be added to the Related Application. If the 'Calculate Using Building Classification' field is not flagged 'ON' then fees will not be added to the Related Application.

For new Application Types created, this flag is defaulted to 'On'.

Location Details - Locations Required
The Locations Required check box must be checked on if a Location is required to be entered at the time of Application Lodgement.
If this box is left unchecked then a Location will not be required at the time of Application Lodgement.

Location Details - Default Location
This Dropdown Box allows for the selection of either Street, Property or Parcel as the Default Location for an Application to be lodged against.

Location Details - Include Property
This box if checked on will include the Property Details into the Application at Lodgement.
If unchecked the Property Details will not be included in the Application.

Location Details - Include Parcel
This box if checked on will include the Parcel Details in the Application.
If unchecked the Parcel Details will not be included in the Application.

Location Details - Include Street
If checked on this Field will allow an Application to be lodged against a Street in the Council rather than a particular Property.
If unchecked then Applications can only be lodged against Properties.

Location Details - Copy Owners as Applicants
This box if checked will copy Owners names into the Applicants field on the Lodgement form.
If the box is unchecked, then at the time of Lodgement an Applicant must be selected as another step in the Lodgement Process.

Location Details - Load Property Summary
If this flag is checked on, the Property Summary information will be loaded into the Locations Maintenance Form and display in the Location Summary Information section.
If any changes have been made to the Location Summary information, for example Land Use or Zones updated, the User can use the Refresh Button on the Locations Summary Form to update the Summary information.
If the flag is checked off, when the Application is entered the Location Summary form will not display details.

Location Details - Check Outstanding Consents

If a Consent exists on an existing Application and there is NO Decision on this Consent, when Lodging a new Application against the same location the User will be prompted with a message as follows;
Application 1/199/abs has an outstanding BUILD Consent
“Yes” to maintain this Application
“No” to continue with Lodgement.

If Yes is selected the User will be taken straight to the Application that has the Outstanding Consent on it for the User to action. If No is selected the User may proceed with the Lodgement.

Calculated Using - Dimensions

If this Field is checked on when an Application is lodged, the Fees will be calculated using Dimensions.
If unchecked, Dimensions will not be taken into consideration when lodging an Application.

Calculated Using - Development Category

If this Field is checked on when an Application is lodged, the Fees will be calculated using Development Category information.
If unchecked, Development Category information will not be taken into consideration

Calculated Using - Building Classification

If this Field is checked on when an Application is lodged, the Fees will be calculated using Building Classification information.
If unchecked, Building Classification information will not be taken into consideration when Lodging an Application.

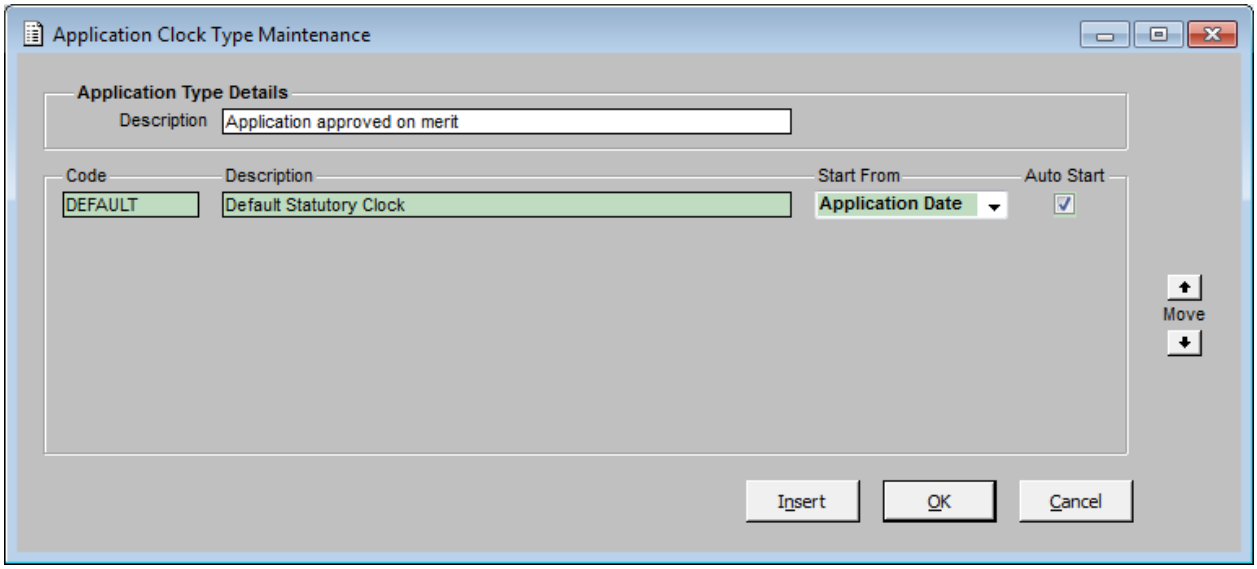
Calculated Using - Consent

If this Field is checked on when an Application is lodged, the Fees will be calculated using Consent information.
If unchecked, Consent information will not be taken into consideration.

Application Clock Type Maintenance

This option allows Processing Clocks to be assigned to the Application Type at Lodgement.

If no Processing Clocks are assigned then no Processing Clocks will be added to the application record at lodgement



Application Clock Type Maintenance

Code
This field displays the Clock Code that has been assigned.

Description
This field displays the Processing Clock description.

Start From
This determines the Start Date of the Processing Clock.

This is a dropdown with the following values:

Application Date
Lodgement Date
Neither

The 'Application Date' will set the 'Started' date/time to the Application Date. As this is a date field only the time is the 'Start Time' from the Processing Clock System parameter.

The 'Lodgement Date' will set the 'Started' date/time to the Lodgement Date/Time (refer Application Data Maintenance for further details)

A value of 'Neither' means that the Processing Clocks will be started from either Workflow or Maintenance and set to the System Date/Time or a Date/Time entered by the User.

For example:

Using 'Application Date' and the Application Date is the 13th December. The 'Started' date/time would be 13th December at 9:00am.

Using 'Lodgement Date and Lodgement Date/time is the 13th December at 3:00pm. The 'Started' date/time would be 13th December at 3:00pm.

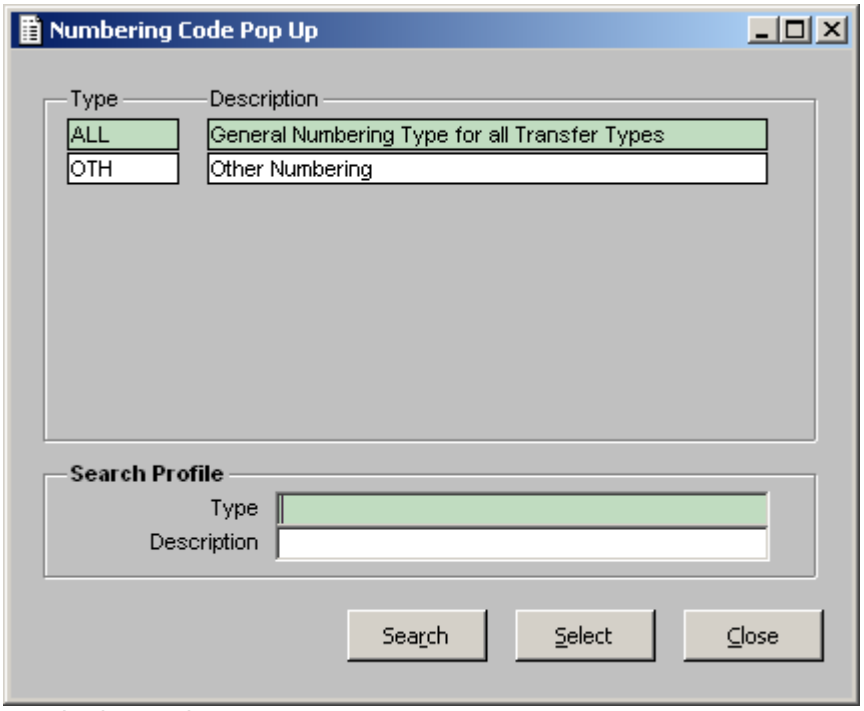
Using the System Date/time or a date time entered by the User the Processing Clock was started on13th December at 3:00pm. The 'Started' date/time would be 13th December at 3:00pm.

Auto Start
This flag determines whether the Processing Clock is to be started at Lodgement or not.

If a Processing Clock is not started automatically when it does start it will look at the value in the 'Start From' field to determine the start date/time.

Numbering Code Pop Up Form

The Numbering Code Pop Up form is used to display a list of valid Numbering Codes for the Application Class.



Numbering Code Pop Up Form

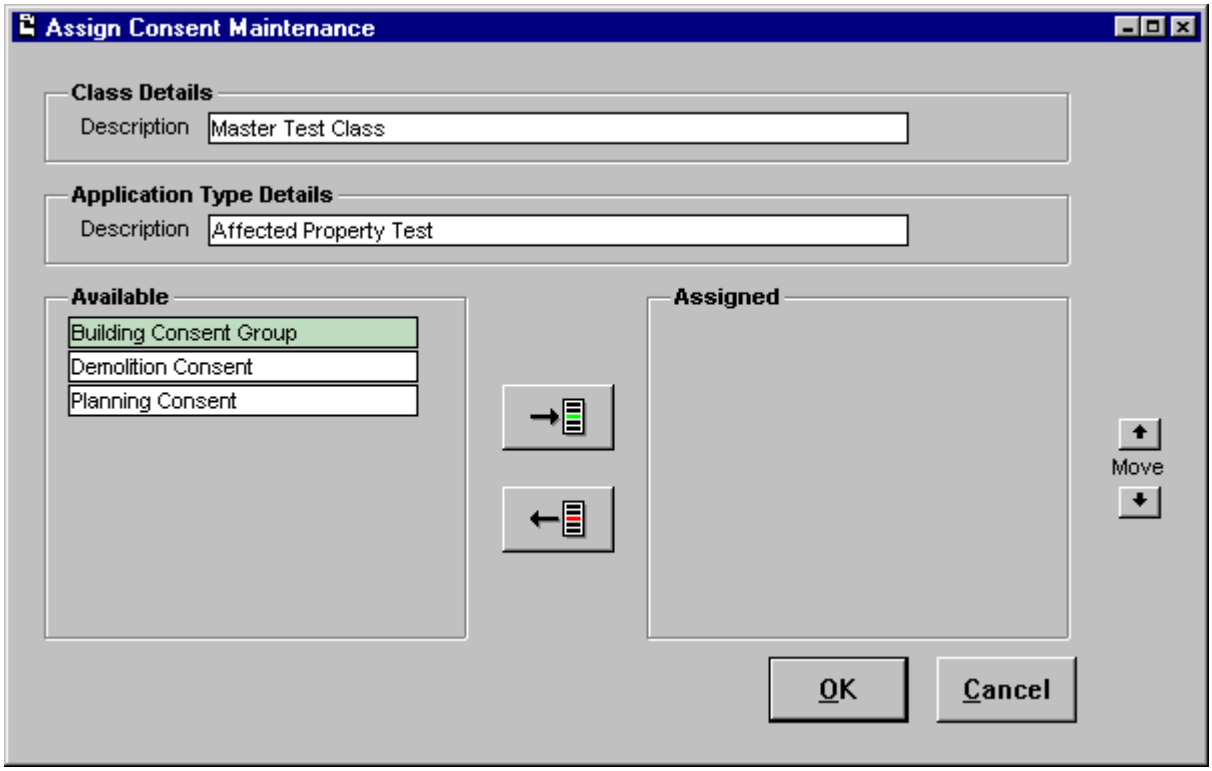
Type / Description
The Numbering Codes and their Descriptions available for selection are displayed in this field.

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 Consent Maintenance Form

The Assign Consents Form allows specific consents to be assigned to this Application Type.



Assign Consent Maintenance Form

Class Details Description
The Class Description Detail Field describes the name of the actual Class currently being used.

Application Type Details Description
This field contains the description of the Class of Application to which you are assigning An Application Type.

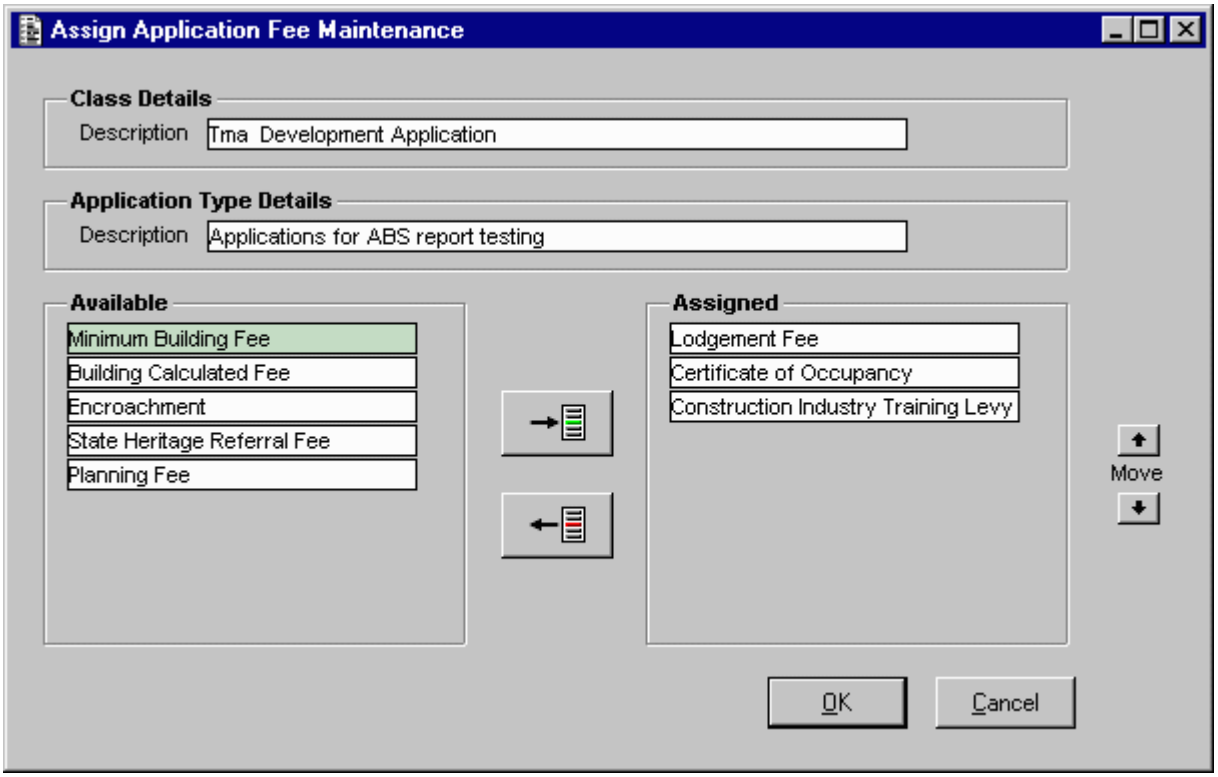
Available
This field lists the available Consent Types that can be Assigned to this Application Type.

Assigned

This field lists the Consent Types that have been assigned to this Application 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.

Assign Application Fee Maintenance Form

The Assign Application Fee Maintenance Form allows specific Application Fees to be assigned to this Application Type.



Assign Application Fee Maintenance Form

Class Details Description
The Class Description Detail Field describes the name of the actual Class currently being used.

Application Type Details Description
This field contains the description of the Class of Application to which you are assigning An Application Type.

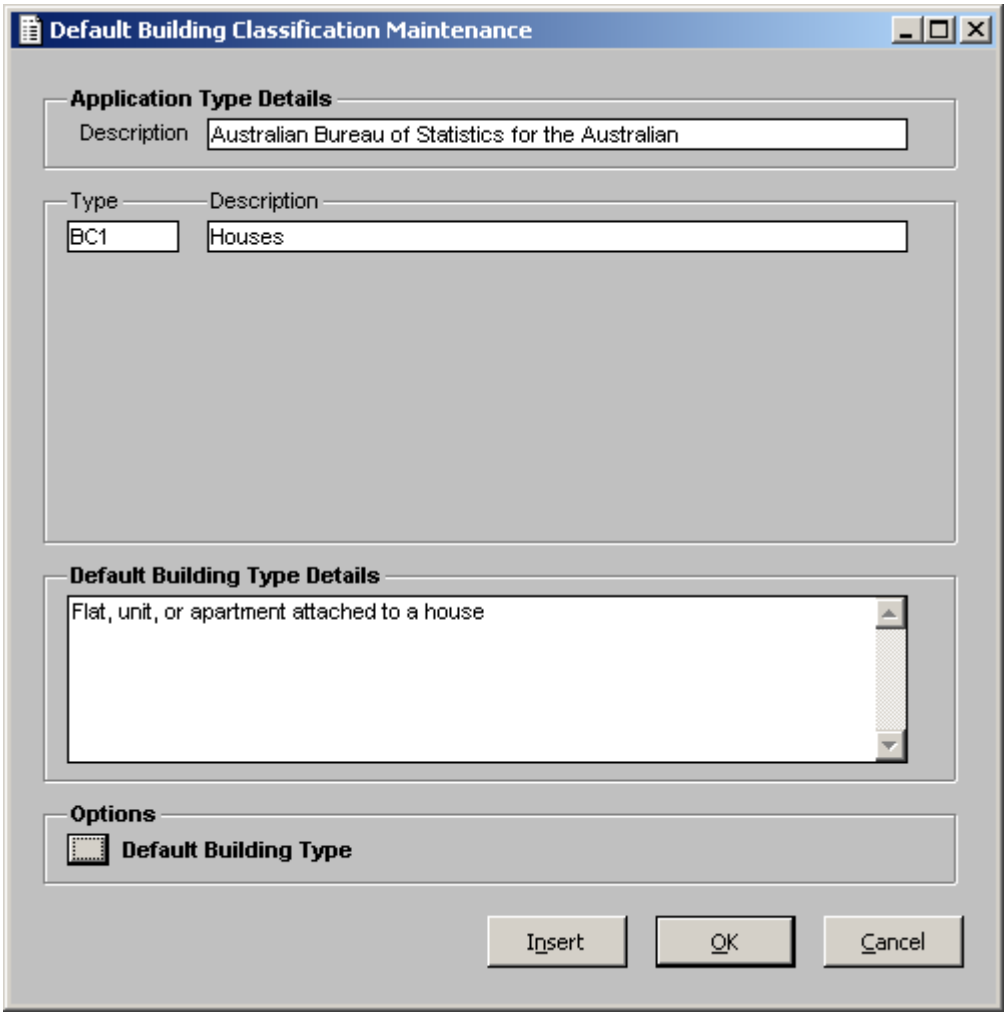
Available
This field lists the available Fee Types that can be Assigned to this Application Type.

Assigned

This field lists the Fee Types that have been assigned to this Application 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.

Default Building Classification Maintenance Form

The Default Building Classification Maintenance Form allows for the setting of Building information that can be defaulted in at the time of Lodgement.



Default Building Classification Maintenance Form

Application Type Details - Description

This field contains the description of the Class of Application to which you are assigning default Building Classifications.

Application Type Details - Type

The Type Code for the Building Classification that has already been assigned to the Application Type is shown in this field.

Application Type Details - Description

The Description for the Building Classification that has already been assigned to the Application Type is shown in this field.

Default Building Type Details

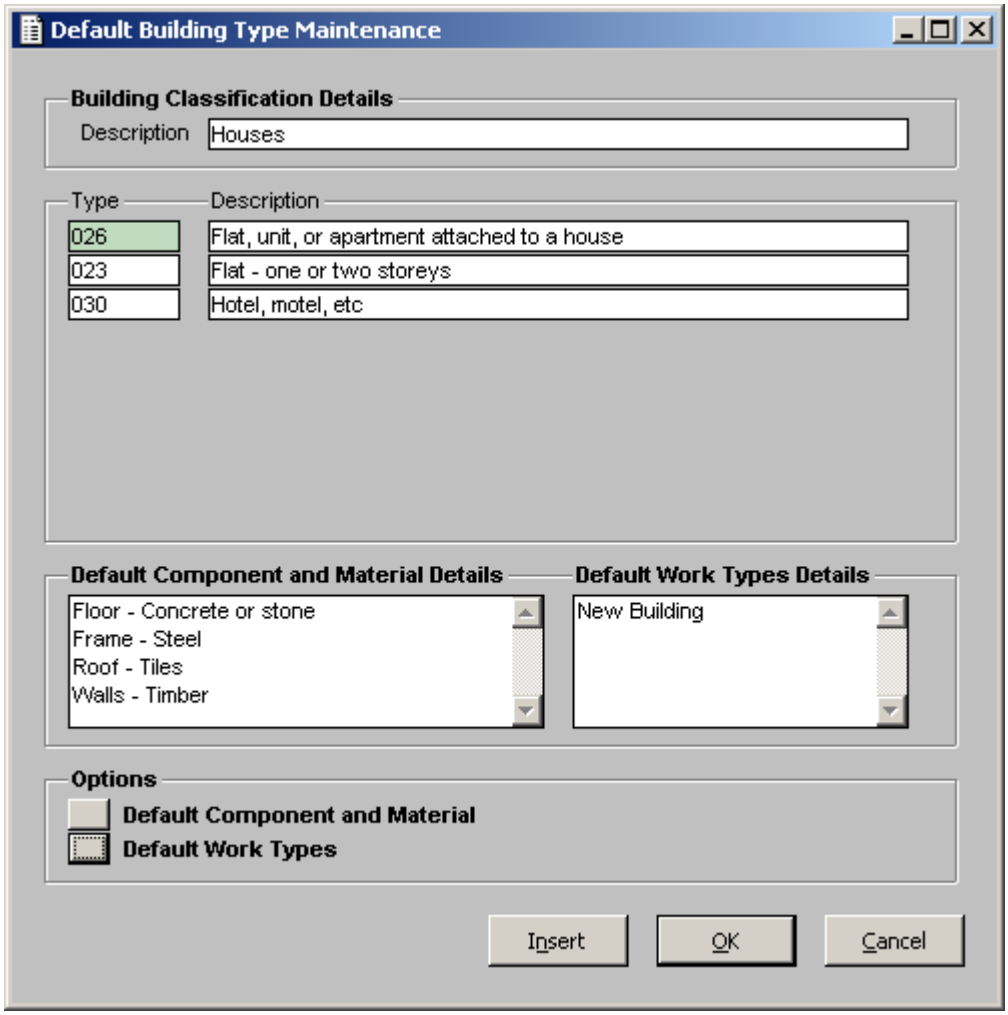
The Default Building Type field displays details of the Building Types that have been assigned to the Building Classification that currently has focus placed on it. As the focus is moved from one assigned Building Classification to another so the information displayed in this field will change to display the Building Type(s) for the Classification.

Options – Default Building Type

When Building Types have been assigned to the Building Classification then this Options Button is bolded. If no Building Types have been assigned to the Classification then the Option is not bolded. Selection of this Option allows the User to update the Building Types for the Building Classification.

Default Building Type Maintenance Form

The Default Building Type Maintenance Form allows for the setting of Building Type information for the selected Building Classification nominated that can be defaulted in at the time of Lodgement.



Default Building Type Maintenance Form

Building Classification Details - Description

This field contains the description of the Building Classification to which you are assigning default Building Types.

Building Classification Details - Type

The Type Code for the Building Type that has already been assigned to the Building Classification is shown in this field.

Building Classification Details - Description

The Description for the Building Type(s) that has already been assigned to the Building Classification is shown in this field.

Default Component and Material Details

The Default Component and Material Details field displays details of the Components and their Materials that have been assigned to the Building Type that currently has focus placed on it. As the focus is moved from one assigned Building Type to another so the information displayed in this field will change to display the Components and Materials for the Type.

Default Work Types Details

The Default Work Types Details field displays details of the Work Types that have been assigned to the Building Type that currently has focus placed on it. As the focus is moved from one assigned Building Type to another so the information displayed in this field will change to display the Work Types for the Type.

Options – Default Component and Material

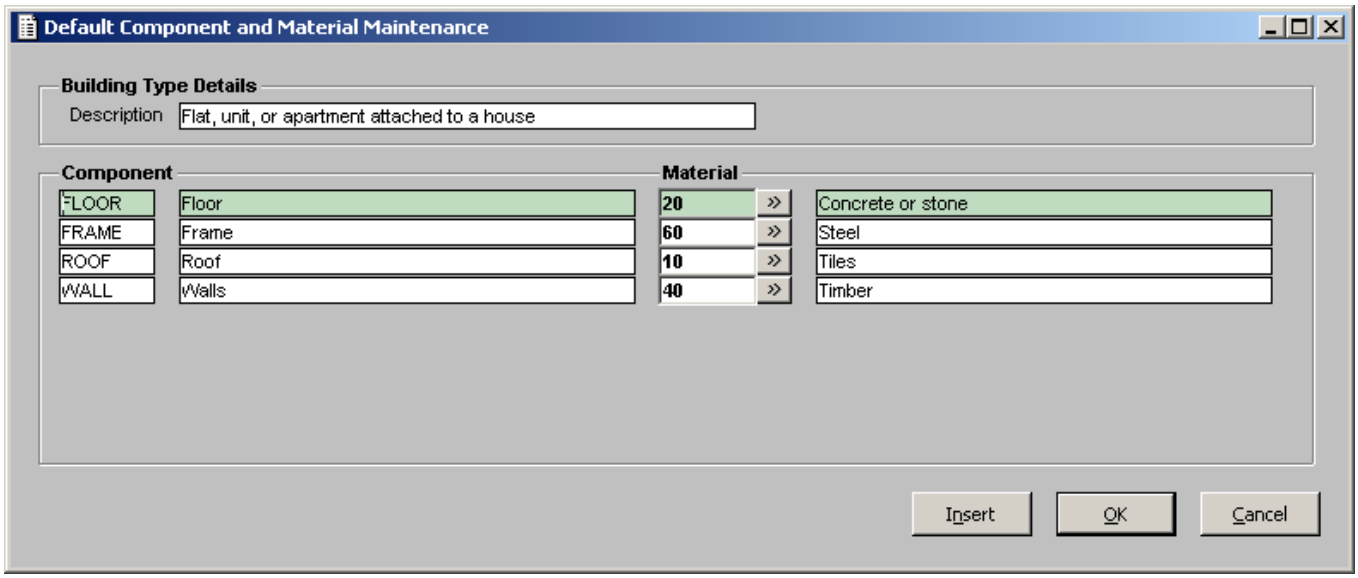
When Components and Materials have been assigned to the Building Type then this Options Button is bolded. If no Components and or Materials have been assigned to the Type then the Option is not bolded. Selection of this Option allows the User to update the Components and or Materials for the Building Type.

Options – Default Work Types

When Work Types have been assigned to the Building Type then this Options Button is bolded. If no Work Types have been assigned to the Type then the Option is not bolded. Selection of this Option allows the User to update the Work Type for the Building Type.

Default Component and Material Maintenance Form

The Default Component and Material Maintenance Form allows for the setting of Building information that can be defaulted in at the time of Lodgement.



Default Component and Material Maintenance Form

Building Type Details - Description

This field contains the description of the Building Type to which you are assigning default Components and or Materials.

Component

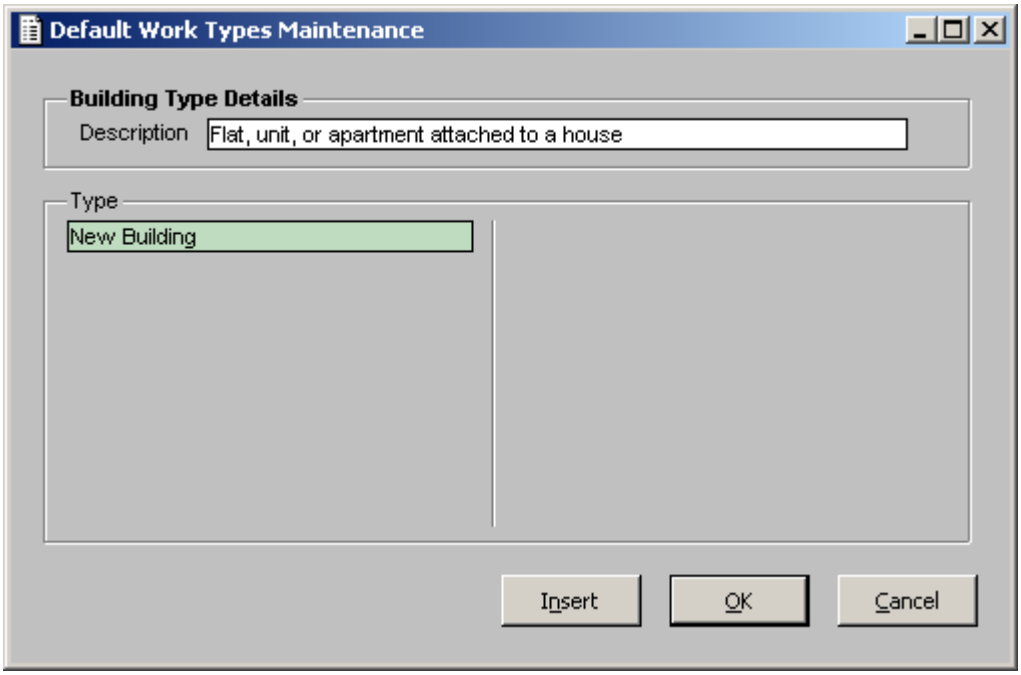
The Component that has been assigned to the Building Type is shown in this field. Once a Component has been selected it is possible to nominate the Material that the Component will be made up of. Or the Material field can be left blank and filled in during Lodgement or Maintenance of the Application.

Material

If the Material has been selected for the Component that the Material Code and Description will display in this field. The Material field can be left blank and updated during Lodgement or Maintenance of the Application. If a Material Type is required then the Material Code can be entered directly into the field or if the Code is not known the Pop Up button can be used to display a list of available Material Types.

Default Work Type Maintenance Form

The Default Work Type Maintenance Form allows for the setting of Building information that can be defaulted in at the time of Lodgement.



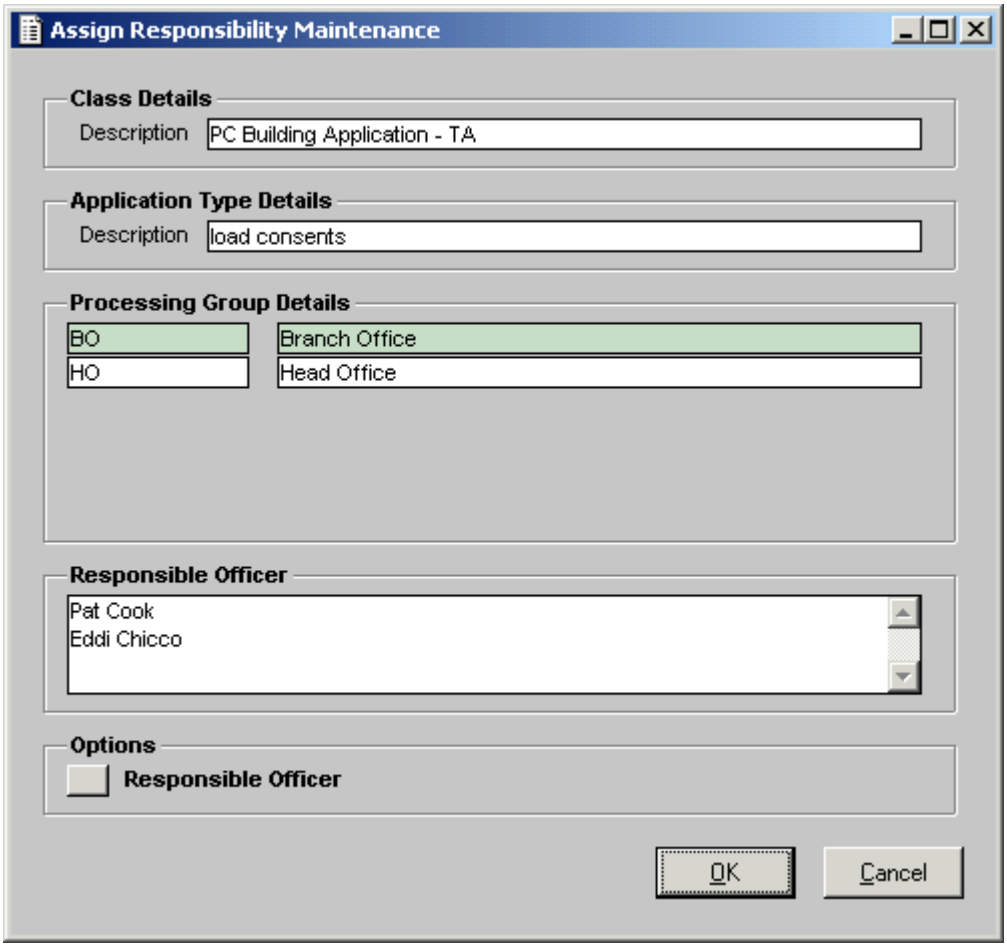
Default Work Types Maintenance Form

Building Type Details
This field contains the description of the Building Type to which you are assigning default Work Types.

Type
The Work Type Code for the Building Type that has already been assigned to the Building Type is shown in this field.

Assign Responsibility Maintenance Form

The Assign Responsibility Maintenance is designed to allow Responsibility Groups to be linked to particular Processing Groups for the Application Type.



Assign Responsibility Maintenance Form

Class Details Description

The Class Description Detail Field describes the name of the actual Class currently being used.

Application Type Details Description

This field contains the description of the Class of Application to which you are assigning An Application Type.

Processing Group Details

This field lists the Processing Groups previously defined in the system.

Responsible Officer

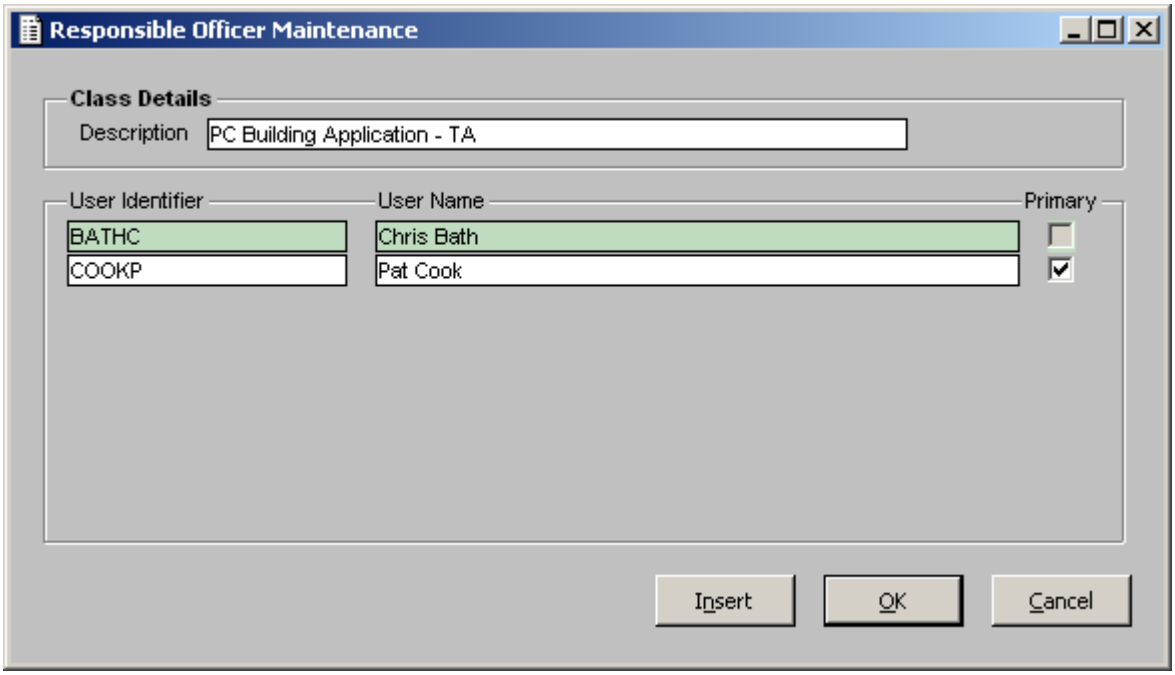
The Responsible Officer field displays those Officers that have been assigned to the Processing Group. As focus on the Processing Groups moves from one to the other so the details in this area change to reflect those Responible Officers for the highlighted Group.

Options - Responsible Officer

The Responsible Officer Option allows the user to select or maintain the Officers that are to be associated to the Processing Group currently in focus.

Responsible Officer Maintenance Form

The Responsible Officer Maintenance Form is used to assign the Responsible Officers for a particular Processing Group.



Responsible Officer Maintenance Form

Class Details Description
The Class Description Detail Field describes the name of the actual Class currently being used.

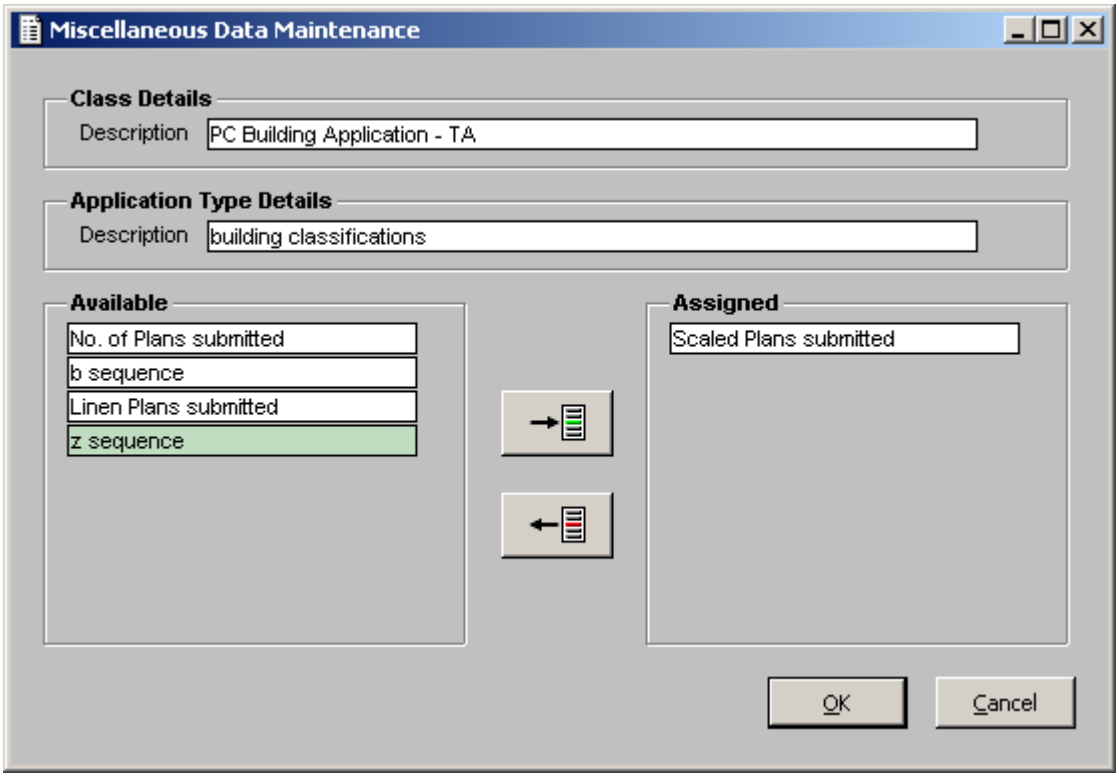
User Identifier
The User Identifier of the Responsible Officer is displayed in this field.

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.

Miscellaneous Data Maintenance Form

The Miscellaneous Data Maintenance Form is designed to allow Miscellaneous Data to be linked to the particular Application Type.



Miscellaneous Data Maintenance Form

Class Details Description
The Class Description Detail Field describes the name of the actual Class currently being used.

Application Type Details - Description
This field contains the description of the Class of Application to which you are assigning an Application Type.

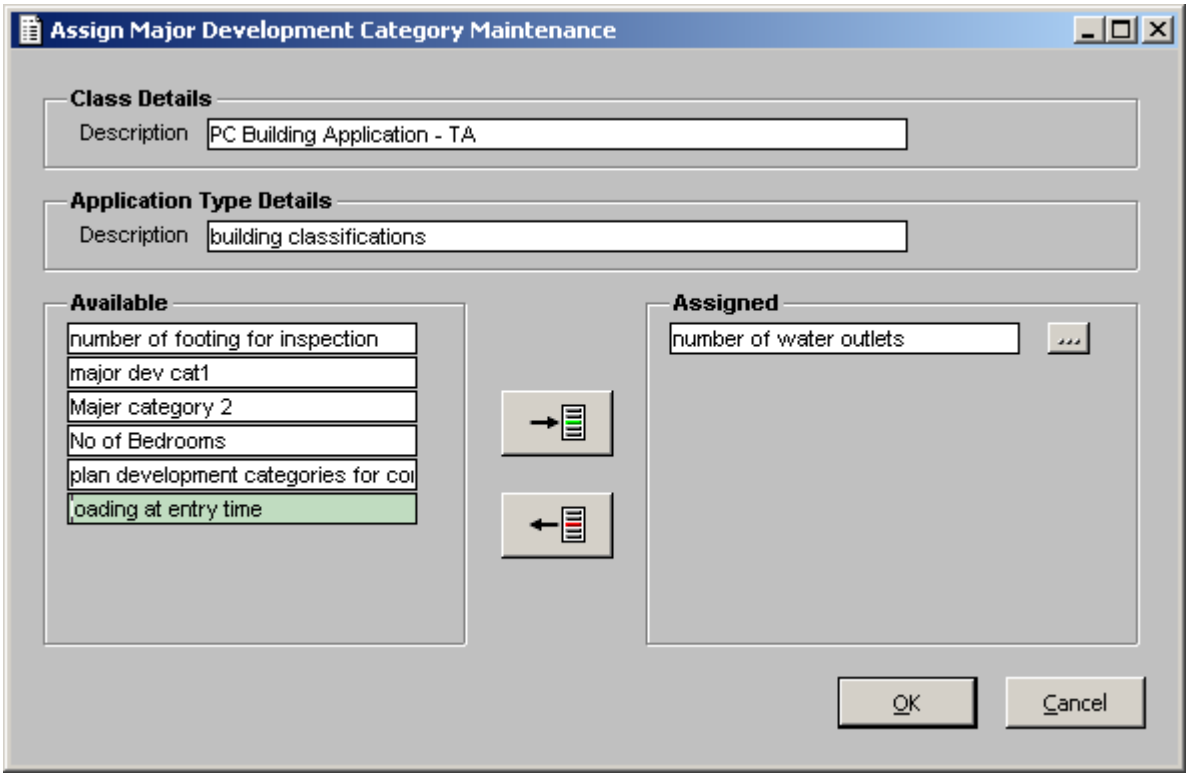
Available
This field lists the available Miscellaneous Data Types that can be Assigned to this Application Type.

Assigned
This field lists the Miscellaneous Data Types that have been assigned to this Application 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 Development Category Maintenance Form

The Assign Major Development Category Maintenance Form is designed to allow Major Development Categories to be linked to the particular Application Type.



Assign Major Development Category Maintenance Form

Class Details - Description
The Class Description Detail Field describes the name of the actual Class currently being used.

Application Type Details - Description
This field contains the description of the Class of Application to which you are assigning an Application Type.

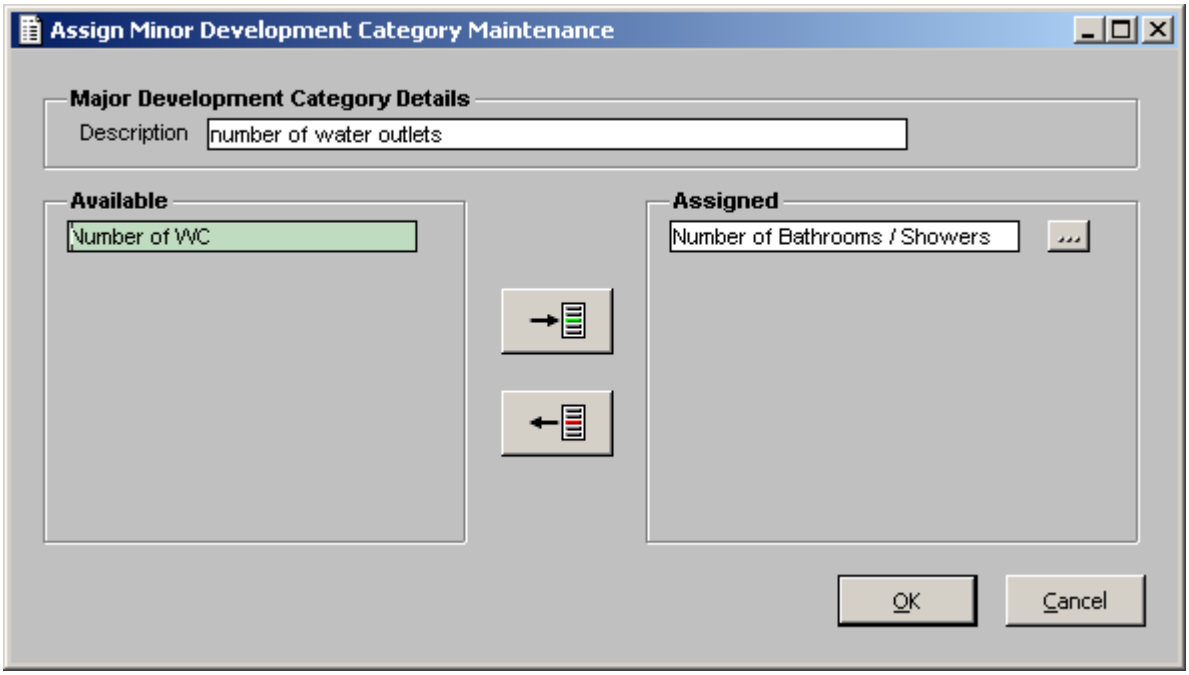
Available
This field lists the available Major Development Categories that can be Assigned to this Application Type.

Assigned
This field lists the Major Development Categories that have been assigned to this Application Type.
Major Development 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 Development Category Maintenance Form

The Assign Minor Development Category Maintenance Form is designed to allow Minor Development Categories to be assigned for the Major Category that has been linked to the particular Application Type.



Assign Minor Developmnent Category Maintenance Form

Major Development Category Details - Description

This field contains the description of the Major Development Category to which you are assigning Minor Categories.

Available

This field lists the available Minor Development Categories that can be Assigned to this Major Development Category.

Assigned

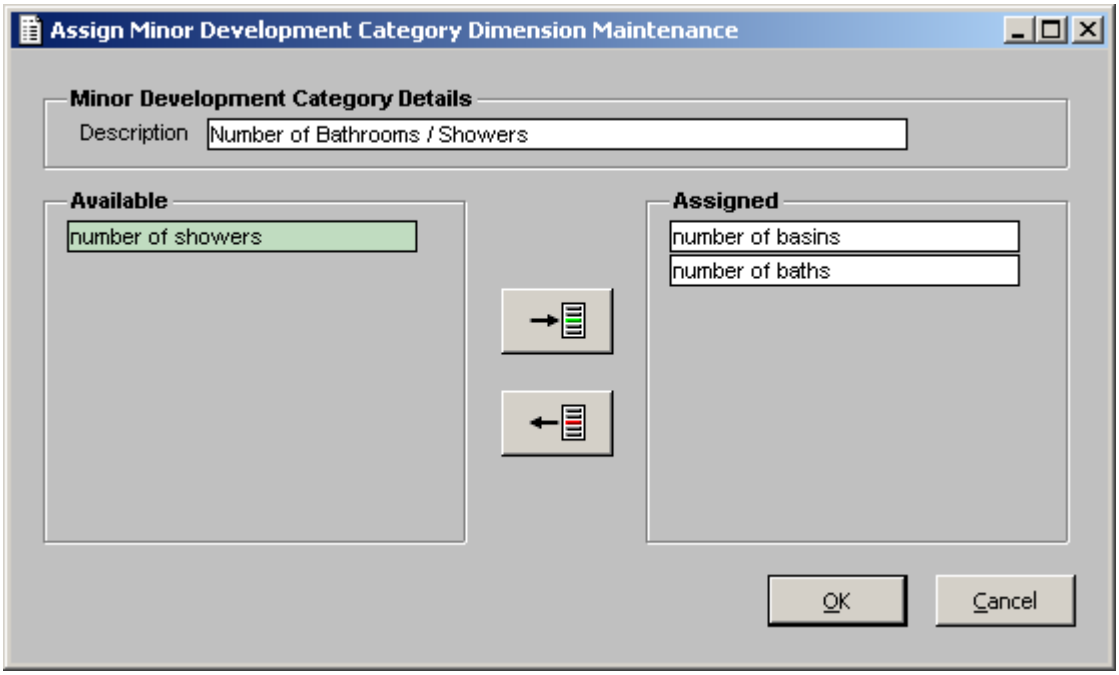
This field lists the Minor Development Categories that have been assigned to this Major Development Category. Minor Development Categories can be assigned or unassigned by highlighting the particular Minor Category and clicking on either the Select or Remove buttons located in the centre of the form.
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 Development Category Dimension Detail Button

If only certain Minor Development Category Dimensions for the Minor Development Category are required then selecting this Detail allows the User to assign the Minor Categories Dimensions that are to be used.

Assign Minor Development Category Dimension Maintenance Form

The Assign Minor Development Category Dimension Maintenance Form is designed to allow Minor Development Category Dimensions to be assigned for the Minor Category that has been linked to the particular Application Type.



Assign Minor Development Category Dimension Maintenance Form

Minor Development Category Details - Description

This field contains the description of the Minor Development Category to which you are assigning Minor Category Dimensions.

Available

This field lists the available Minor Development Category Dimensions that can be Assigned to this Minor Development Category.

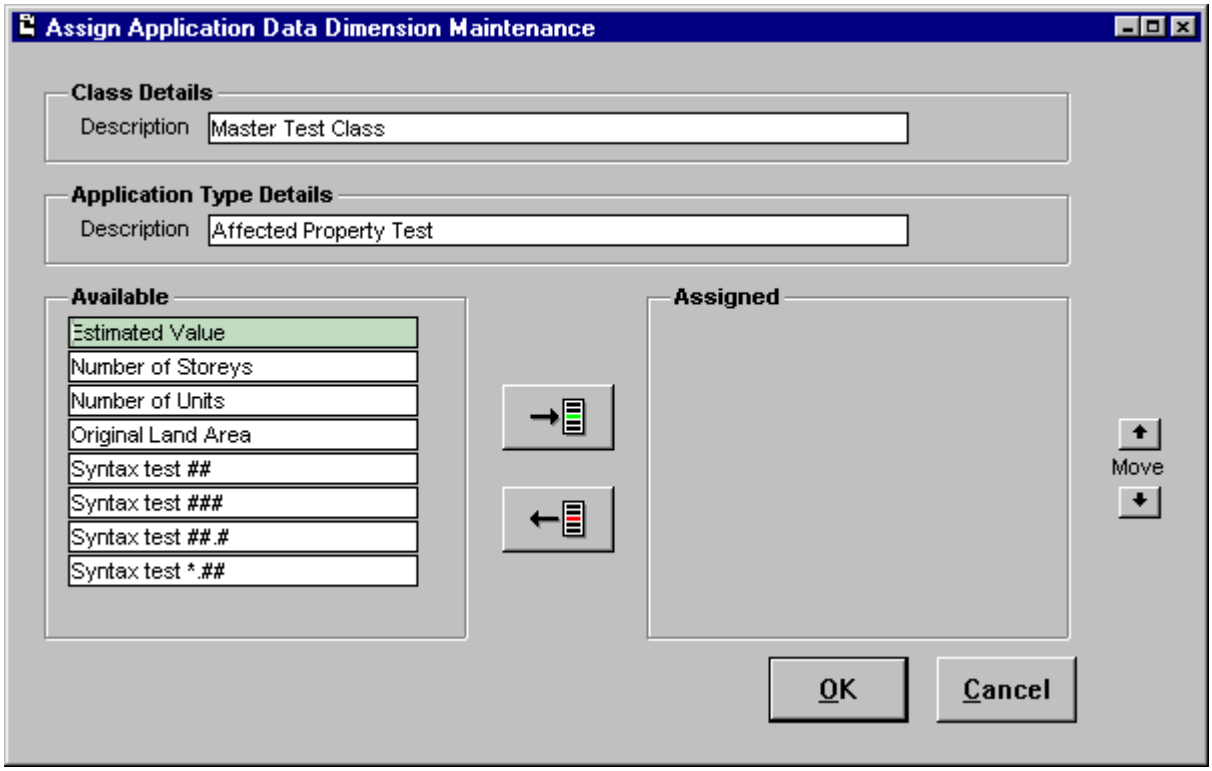
Assigned

This field lists the Minor Development Category Dimensions that have been assigned to this Minor Development Category. Minor Development 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.

Assign Application Data Dimension Maintenance Form

The Assign Application Data Dimension Maintenance form is designed to allow Application Data Dimensions to be linked to the particular Application Type.

The same form is also used for assigning ***Development Data Dimensions*** and ***Subdivision Data Dimensions***.



Assign Application Data Dimension Maintenance Form

Class Details Description

The Class Description Detail Field describes the name of the actual Class currently being used.

Application Type Details Description

This field contains the description of the Class of Application to which you are assigning An Application Type.

Available

This field lists the available Dimension Types that can be Assigned to this Application Type.

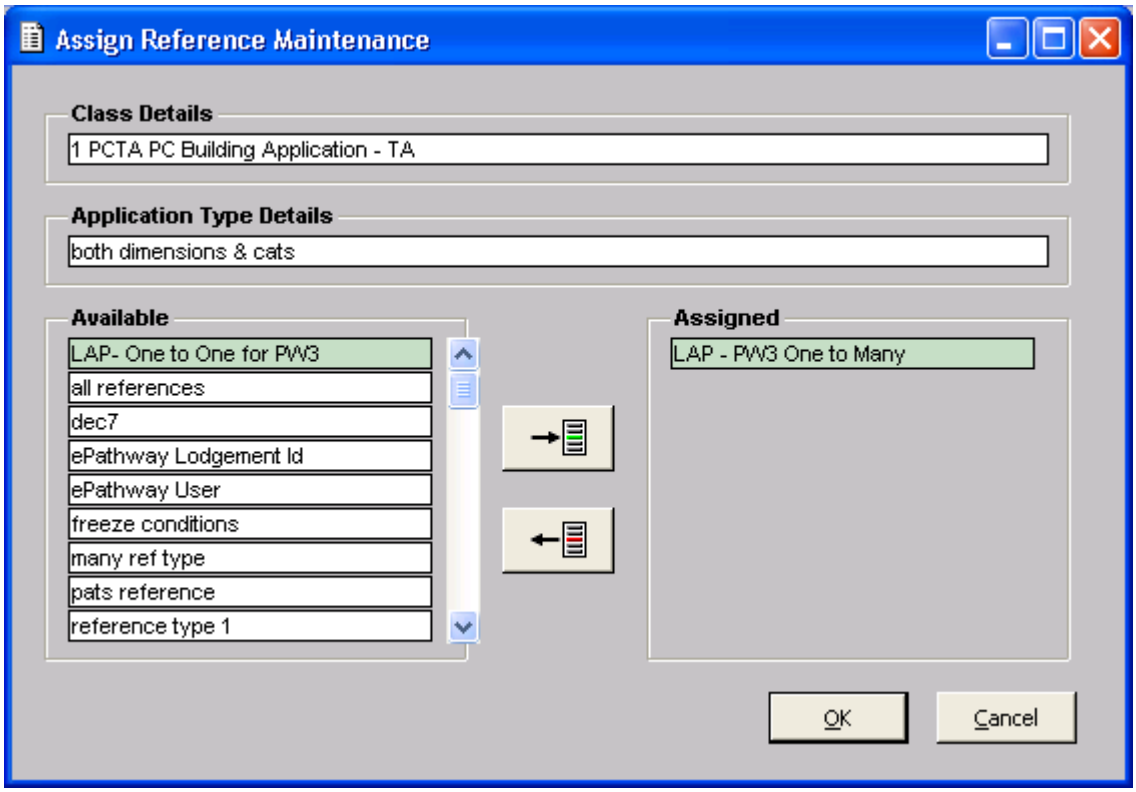
Assigned

This field lists the Dimension Types that have been assigned to this Application 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.

References

Reference Type Selection

The References Maintenance Form allows the user to assign a reference(s) as default reference type against the application.



Class Detail – Description
This field displays the Class Description.

Type
This field describes the Application Type Description

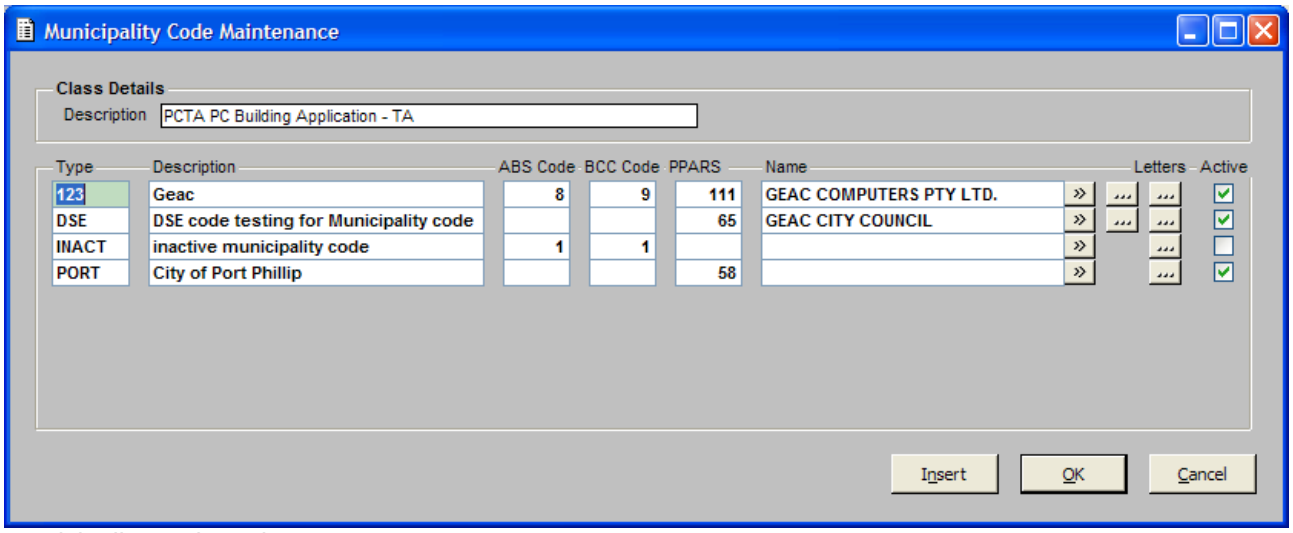
Available
This list of fields displays all of the References that are avaible to select as default(s) for this Application Type

Assigned
This list of fields displays all references that have been assigned as default(s) for this Application Type.

Municipality Code

Municipality Code Maintenance Form

The Municipality Code Maintenance Form is used to store information required for the ABS or BCC, the Long Service Levy Fees reports and the Dept. of Sustainability and Environment Control reporting.



Municipality Code Maintenance Form

Class Detail – Description
This field displays the Class Description.

Type
This field displays the Municipality Type. This field is also used for storing the allotted Planning Scheme Code and should also have an associated PPARS Code assigned it to be used for the PPARS Extract process.

Description
This field displays the Municipality Description.

ABS Code
Enter the Municipality Code. The Code is a three character numeric code. A list of codes is provided in the System Parameter section of the User Guide.

BCC Code
Enter the Municipality Code. The Code is a two character numeric code. A list of codes is provided in the System Parameter section of the User Guide.

PPARS Code
Enter the PPARS Code. The Code is a three character numeric code. This code is used as the Responsible Authority in the PPARS Planning return.

Name

Enter the Council Name or use the Pop Up to search for the required Council Name. If the Council Name is required for the Long Service Levy Fees or PlanFirst Fees reporting then the Communication Types of Contact Name, Contact Phone, Contact Position and Contact Email will need to be defined on the Name record. Additionally Information Types of ABN and Long Service Levy Agent will also need to be set up.

Letters

The Letters Detail Button is used to display the Summary Information Documents produced as part of the PlanFirst Levy Report for NSW.

Active

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

Workflow

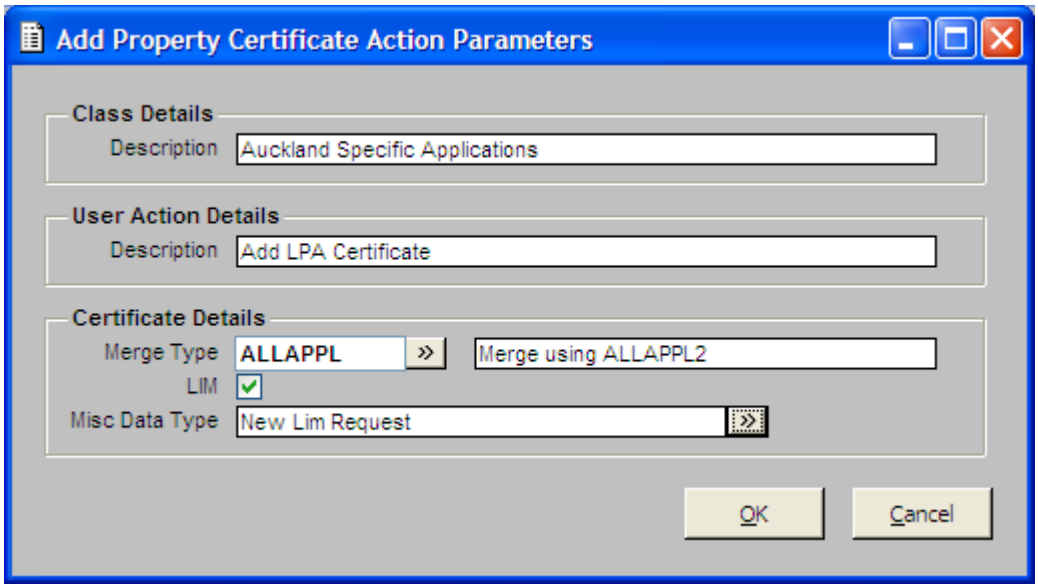
This option is used to set up Workflow Parameters. Please refer to the Workflow User Guide for more information on this option.
As some of the Workflow System Actions are related to Applications the following Action Forms are available within the Applications Workflow System Actions.

Add Property Certificate Action Parameters

The Add Property Certificate Parameter is available when the Action Parameter Option is selected from the User Maintenance Form and the System Action of ADDLPACERT has been entered. This form allows the selection of a Merge type that will be added to the selected application, and if the LIM select box is ticked on it also allows for a Miscellaneous Data Type to be added to the application.

When actions based on *Add Property Certificate* are executed as part of a Workflow task, the thick client's Certificate Entry form is displayed pre-populated with the merge type specified in the action parameters, as shown in below. It is still possible to replace the pre-populated merge type with a different one. The request summary is also populated with application information, to aid later identification. If the *LIM* checkbox has been selected against the action parameters, a record is added to table LAPLIMC upon acceptance of the certificate details. Additionally, if a *Miscellaneous Data Type* has been specified, the LIM's document request key (for table CWPREQS) is stored against that data type on the relevant application. The *Draft Print* and *Final Print* options are disabled.

NOTE: This additional functionality has been created specifically for the use of City of Auckland. Should any other site wish to include this functionality please contact the Infor Help Desk for further assistance.



Add Property Certificate Action Parameter Form

Class Details - Description
This field displays the selected 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.

Certificate Details – Merge Type Code and Description
These fields display the Merge Type Code and Description selected for the User Action.

Certificate Details – LIM

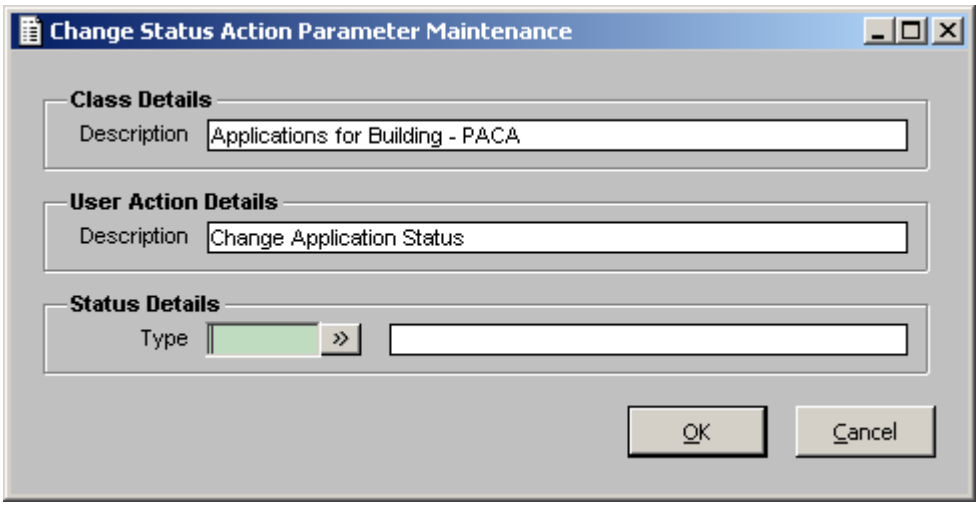
If the **LIM** checkbox has been selected against the action parameters, a record is added to table LAPLIMC upon acceptance of the certificate details.

Certificate Details – Miscellaneous Data Type
if a Miscellaneous Data Type has been specified, the LIM's document request key (for table CWPREQS) is stored against that data type on the relevant application. The *Draft Print* and *Final Print* options are disabled.

The code of the miscellaneous data type may be entered here or it may be selected from a pre-determined list using the detail out button.

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 an Application. 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

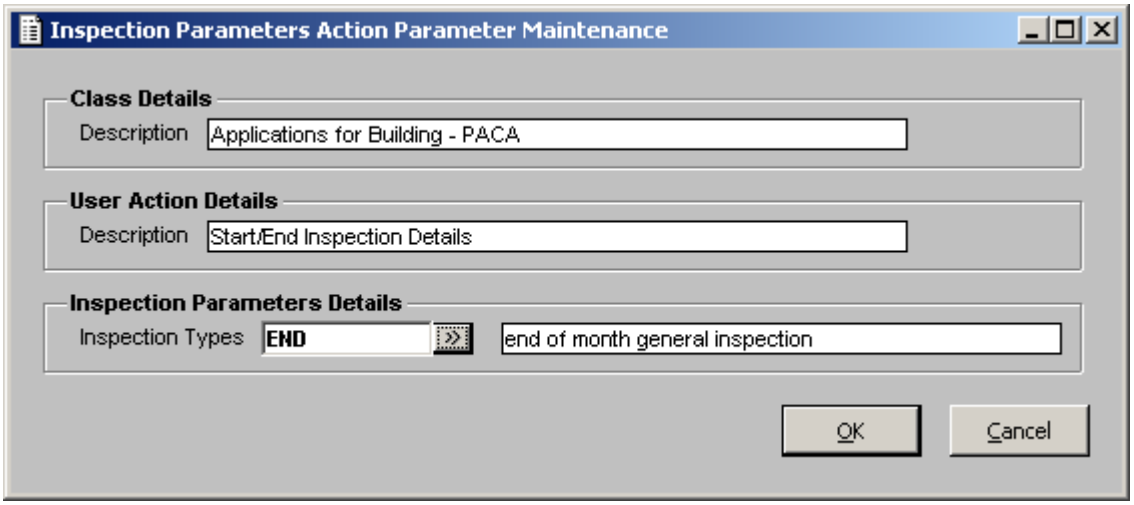
Class Detail – Description
This field displays the Class Description.

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 Application 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 Application 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 an Application.



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 Application 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 an Application as well as other run time options.

Please note that the functionality varies between the Thick and Smart Clients.

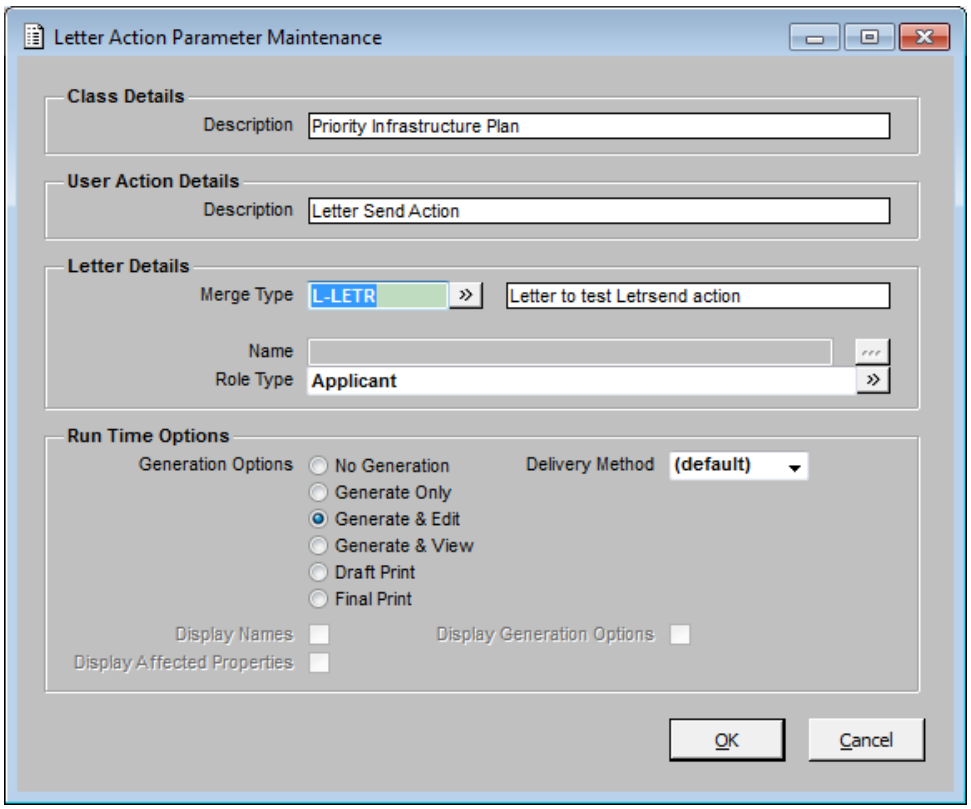
The following functionality is now available in the Smart Client:

1) Where applicable letters will be generated and presented for editing or viewing without any user intervention.

2) Letters can be generated and finalised without the need to send the letter.

3) With the Display Names option in use, the Names Maintenance form can be automatically closed after a letter has been sent.

Thick Client
Although the LETRSEND user action parameters have been changed for both the Thick and Smart Client the new functionality has only been implemented in the Smart Client.
Therefore the only Generation Options applicable to the Thick Client are Generate and Edit, Draft Print and Final Print. If any of the other generation options are selected a draft print will be performed.
Delivery Method and Display Generation Options are not applicable to the Thick Client.



Letter 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 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.

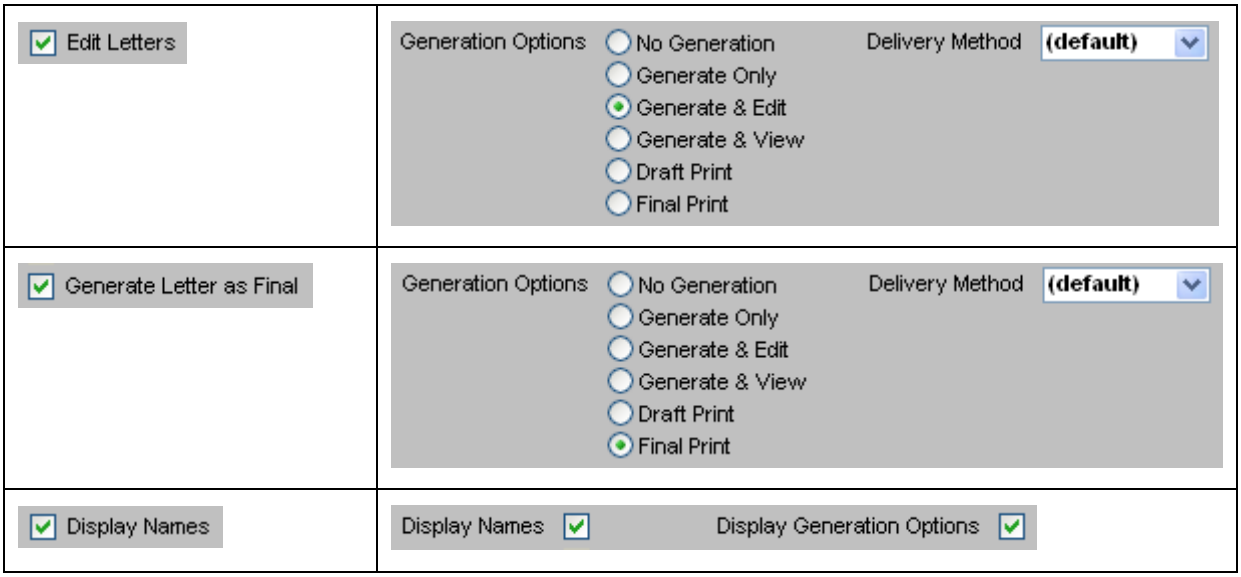
Letter Details – Role Type

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

The following table shows how the new options relate to the old options:

Old Parameter Setting	Equivalent New Parameter Setting
Edit Letters Generate Letter as Final	Generation Options: No Generation / Generate Only / Generate & Edit / Generate & View / Draft Print / Final Print; Delivery Method: (default)



Run Time Options – No Generation
Creates the document request without generating the document.

Run Time Options – Generate Only
Creates the document request and generates the document. The document may be printed at a later date.

Run Time Options – Generate & Edit
Creates the document request, generates the document and automatically presented the document for editing. When multiple documents are generated only the first document is automatically presented for editing. After returning to Pathway from editing the document the Document Maintenance form will be available for any other documents to be selected for viewing as required. This option can only be used when the selected Merge Type allows editing.

Run Time Options – Generate & View
Creates the document request, generates the document and automatically presented the document for viewing. When multiple documents are generated only the first document is automatically loaded for viewing. After returning to Pathway from viewing the document the Document Maintenance form will be available for any other documents to be selected for viewing as required.\

Run Time Options – Draft Print
Creates the document request, generates the document and performs a Draft print of the document (which includes the watermark if required). This option can only be used when the selected Merge Type allows editing.

Run Time Options – Final Print
Creates the document request, generates the document and performs a Final Print, or Finalisation of the document.

Run Time Options – Delivery Method
Selecting a Delivery Method of None and a Generation Option of Final Print will finalise the letter but will not print or send the letter. Selecting a Delivery Method of None and a Generation Option of Draft Print will print but not send the letter. E.g. If the preferred Delivery Method was Email the letter would be draft printed but not sent via email.

Run Time Options – Display Names
With Display Generation Options turned off, the Document Generation options will not be presented to the user when the Send Letter button is pressed on the Names Maintenance form. Instead the document will automatically be generated using the generation option selected at the user action parameters. Once the send letter process has finished the Names Maintenance form will be closed and the next action performed.

Run Time Options – Display Generation Options
With Display Generation Options turned off, the Document Generation options will not be presented to the user when the Send Letter button is pressed on the Names Maintenance form. Instead the document will

automatically be generated using the generation option selected at the user action parameters. Once the send letter process has finished the Names Maintenance form will be closed and the next action performed.

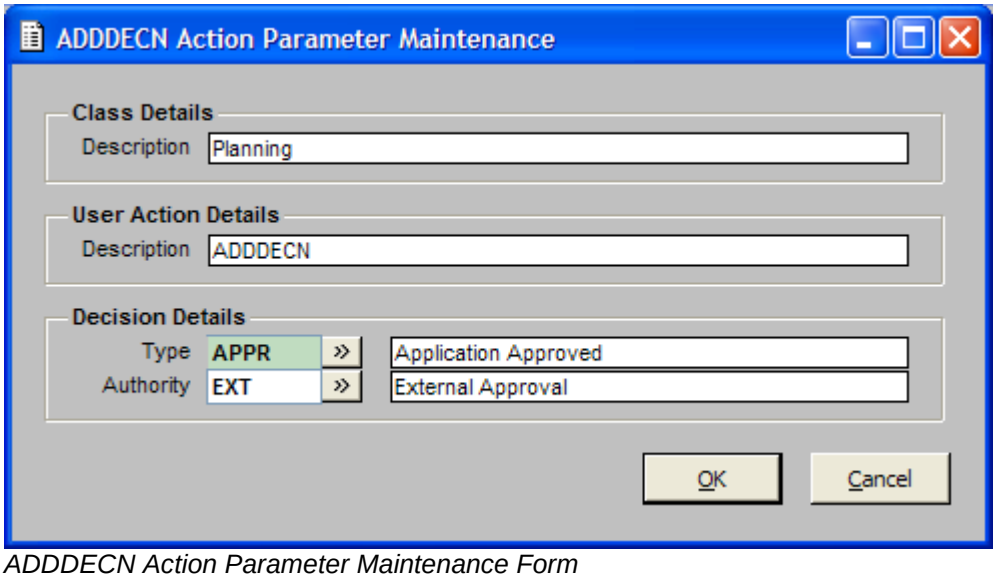
With Display Generation Options turned on, the Document Generation options will be displayed when the Send Letter button is pressed on the Names Maintenance form. Thus allowing the user to select a different generation option. With this option set the Names Maintenance form will NOT be closed automatically once the send letter process has finished. This allows the Names Maintenance form to be displayed as per the old Display Names option.

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 User Action 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 an Application.



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

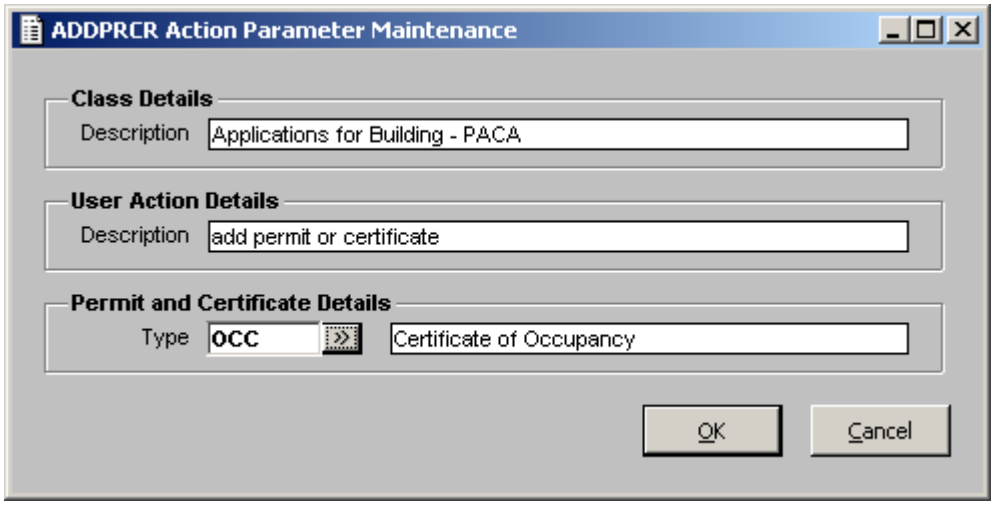
The Decision Type that is to be used is nominated in this field. The Pop Up button can be used to display a list of valid Decision Types that may be selected from.

Decision Details – Authority

The Authority Type and description that is to be used is nominated in this field. The Pop Up button can be used to display a list of valid Authority Types that may be selected from.

ADDPRCR Action Parameter Maintenance Form

The ADDPRCR Action Parameter Maintenance form is displayed when the Action Parameter Option is selected from the User Maintenance Form and the System Action of 'ADDPRCR' has been entered. This form allows the selection of the Permit or Certificate Type that is to be used when the Task is started within an Application.



ADDPRCR Action Parameter Maintenance Form

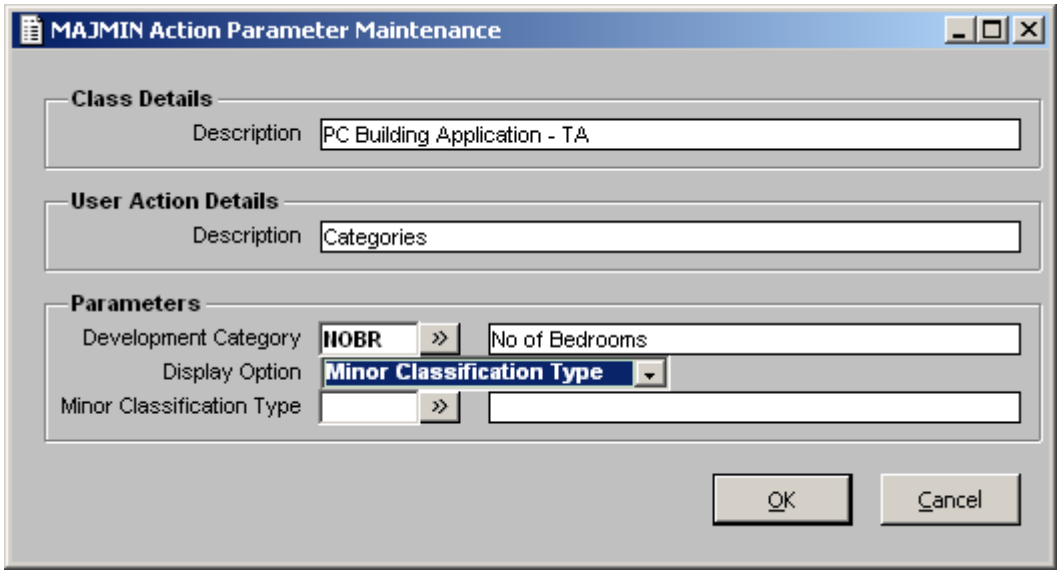
Class Detail – Description
This field displays the Class Description.

User Action Details - Description
This field displays the decription of the User Action that has been selected and for which the Permit or Certificate Type is to be displayed for.

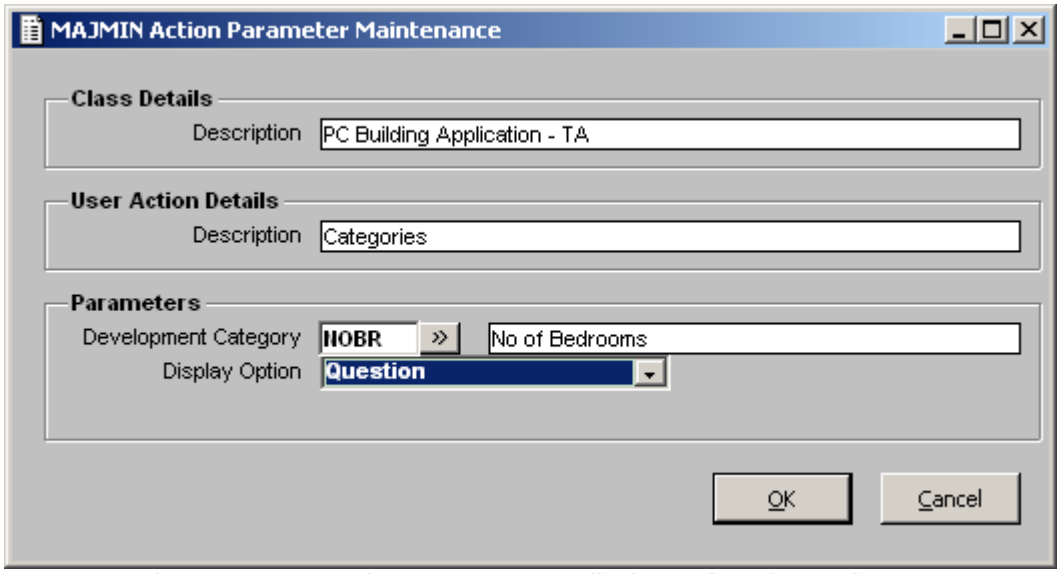
Permit and Certificate Details - Type
The Permit or Certificate Type that is to be used is nominated in this field. The Pop Up button can be used to display a list of valid Permit and Certificate Types to be used.

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 Development Category that is to be used when the Task is started within an Application and whether the Workflow is to display the Minor Classification Type or the Questions for the nominated Development Category. Note that it is not necessary to nominate a display option or enter in a development 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 Development Category Type is to be displayed for.

Parameters – Development Category

If a particular Development 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 Development 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 Development Category. This will allow the User to enter in the answers to the Questions for the Development Category.

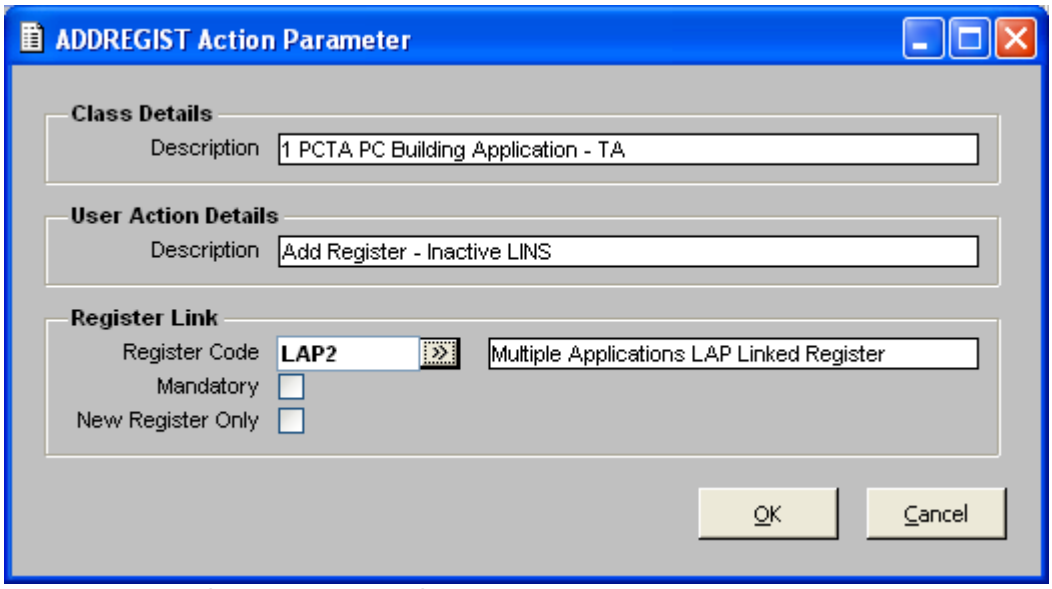
This field can be left blank if required.

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 Minor Classification.

ADDREGIST Action Parameter Maintenance Form

The ADDREGIST Action Parameter Maintenance form is displayed when the Action Parameter Option is selected from the User Maintenance Form and the System Action of 'ADDREGIST' has been entered. This form allows the entry of a specific Register that is to be used when the Task is started within an Application. It also controls whether or not the entry of details into that Register is mandatory or if a new Register entry is required.



ADDREGIST 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 Development Category Type is to be displayed for.

Register Link – Register Code

Entering a code in this field is optional and the following will occur:

- For an action having a Register Code nominated: When the action is started the user will not be presented with a list of authorised Registers but instead will have this Register automatically chosen allowing the user to link to a new or existing Register Entry of this type. If the user is not authorized

to the Register they will be advised. Likewise, the user is also advised if the Register is flagged as inactive.

- For an action not having a Register Code nominated: When the action is started it will behave like the existing REGIST action.

Register Link – Mandatory
The following will occur if this field is checked on:

- When an action having Mandatory checked on is started, if the user attempts to finish that action without linking to a Register they will be advised The user can then either attempt to link to a Register Entry or choose not to. There will be no warning if a link already exists to an occurrence of the register and the user attempts to close.

Note: The Mandatory and New Register Only checkboxes are only available when a Register Code has been nominated

Register Link – New Register Only
The following will occur if this field is checked on:

- When an action having this flag checked on is started, a new Register Entry is automatically created and the Register Entry Maintenance screen is presented. Note: In this scenario the Register Entry Search Profile form is bypassed.

- When an action having this flag checked off is started, the user is shown the Register Entry Search Profile form allowing the user to create a new Register Entry or link to an existing one.

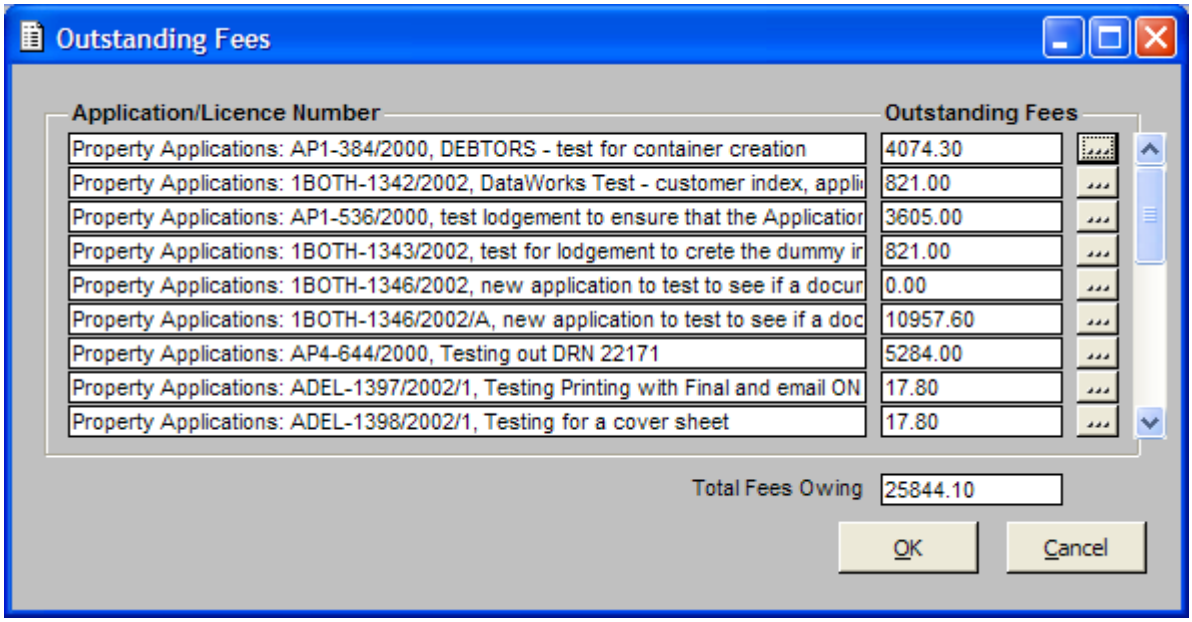
- In addition, checking this parameter off also controls the display of the Application Registers Link Selection form once the initial register addition/maintenance is completed. This shows the Registers that are linked to the Application allowing further Registers to be created or linked if required before returning to the task.

Note: The Mandatory and New Register Only checkboxes are only available when a Register Code has been nominated.

CFO - Check Outstanding Fees Form

The CFO Check Outstanding Fees Workflow Action will display the following form when used within Applications.

By detailing out on any of the Applications/Licences listed the user has the option to maintain the fees providing they have been granted the authority to do so from within the menu Applications >> Application Parameter Options >> Workflow >> User Action Maintenance >> System Action CFO >> User Action Security.

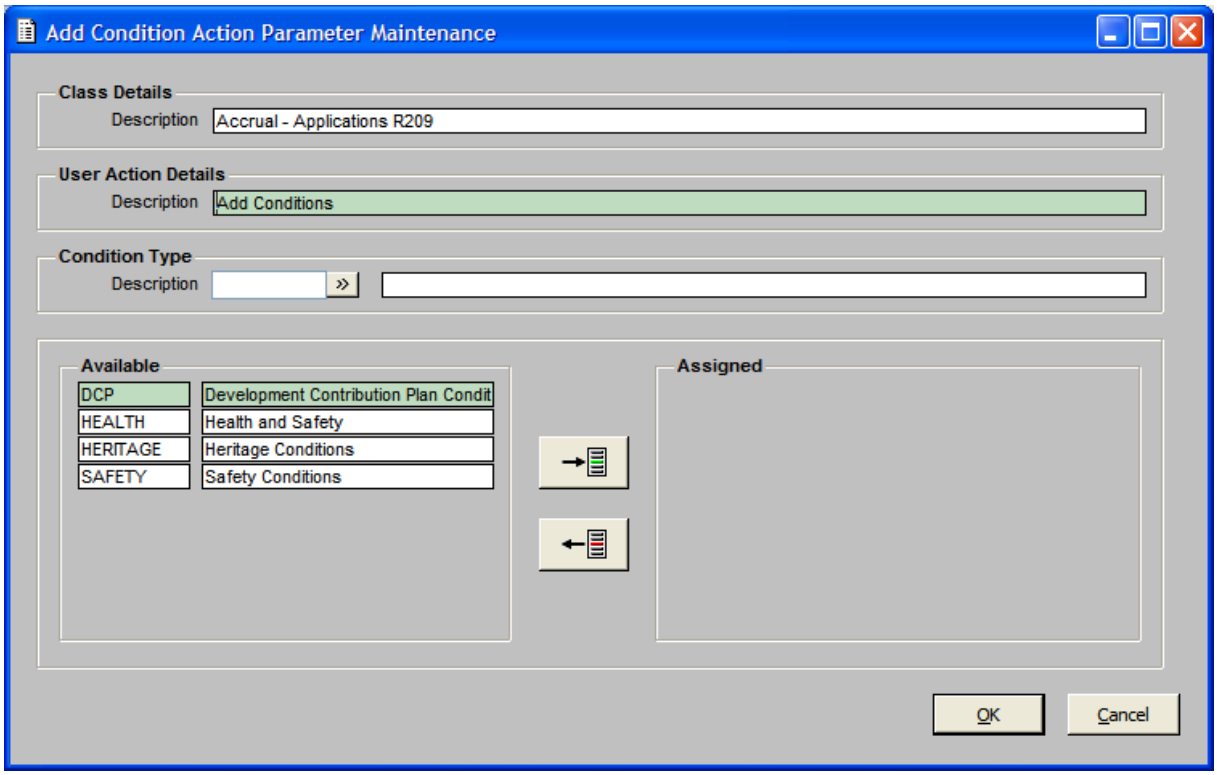


Check O/S Fees Form

Oustanding Fees
This field displays the Outstanding Fees Amount for the Application.

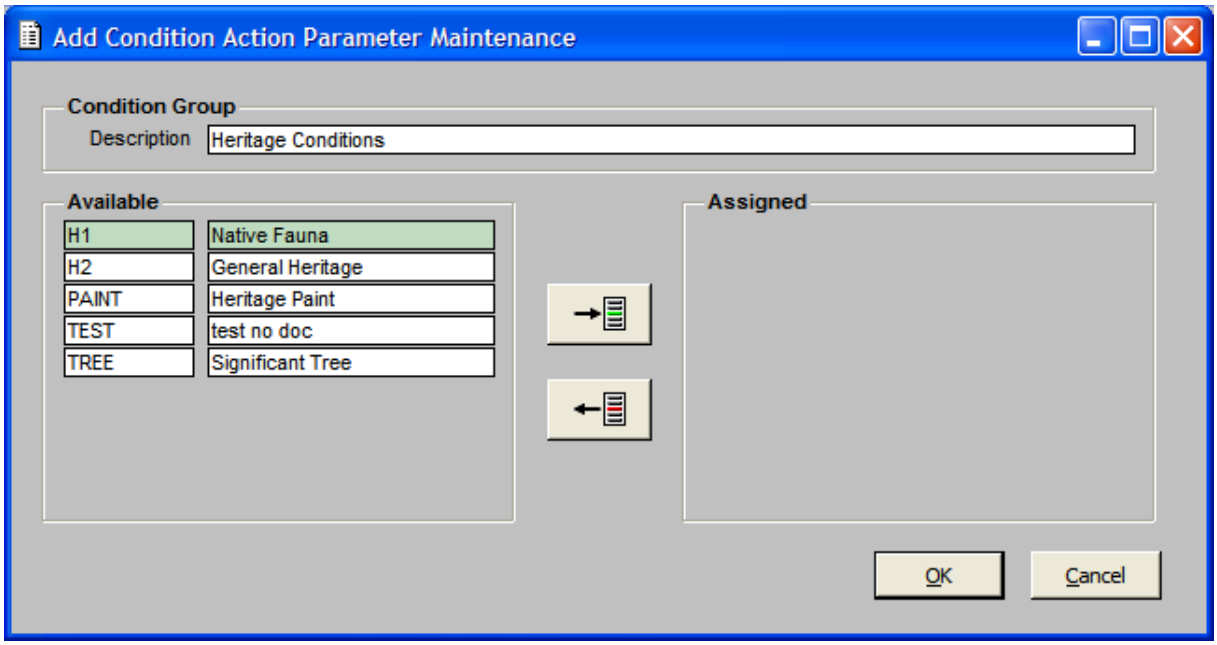
Add Condition Action Parameter Maintenance Form

A new action (ADDCOND) 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.

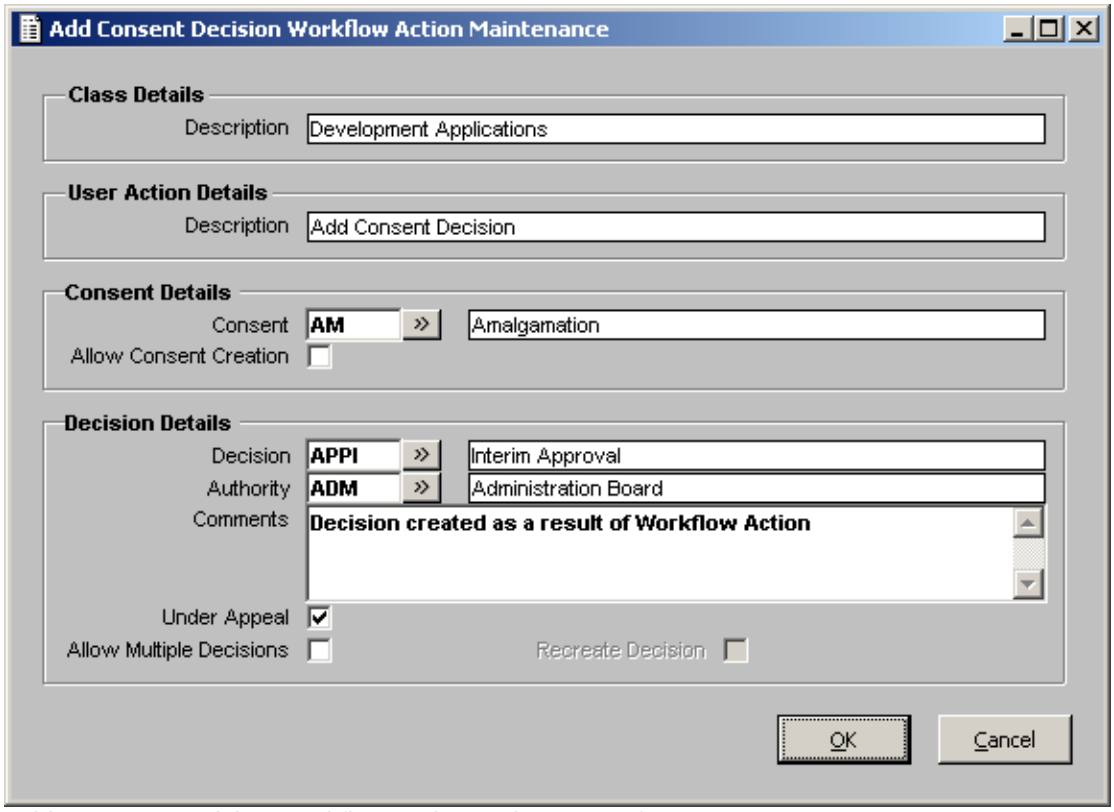


Add Condition Action Parameter Maintenance form

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 (ADDCONDECN), 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

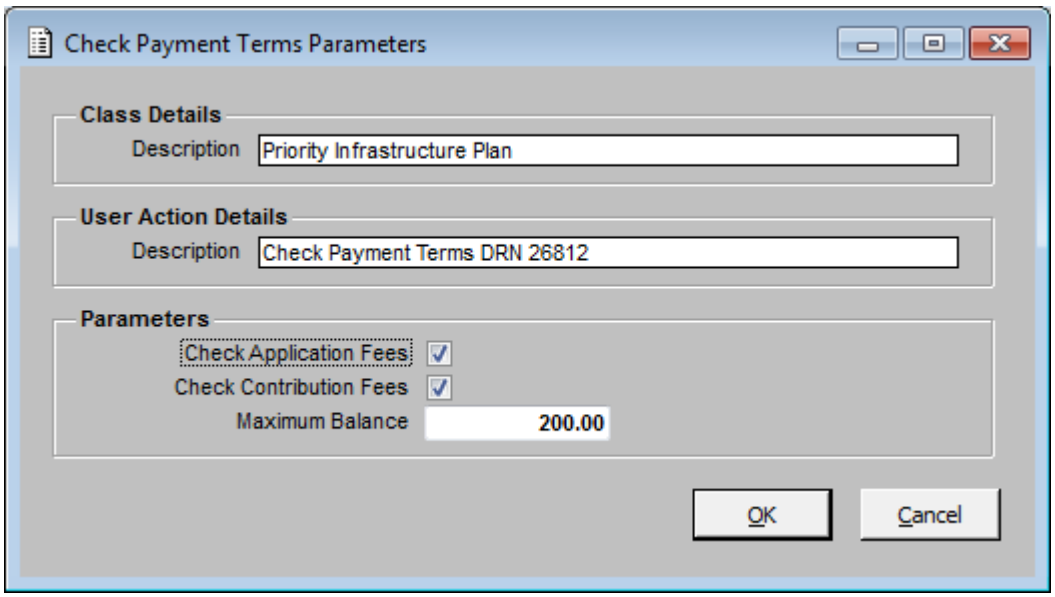
The default Comments that will be assigned to newly created Decision records as a result of executing the Add Consent Decision Workflow Action.

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.

Check Payment Terms Workflow Action Maintenance Form

A new action has been provided at Release 3.09 called “Check Payment Terms”. CHKPAYTERM.
DRN 26812



Check Application Fees
If checked on all Application Fees on the Application will be included when checking the outstanding balance of the Application.

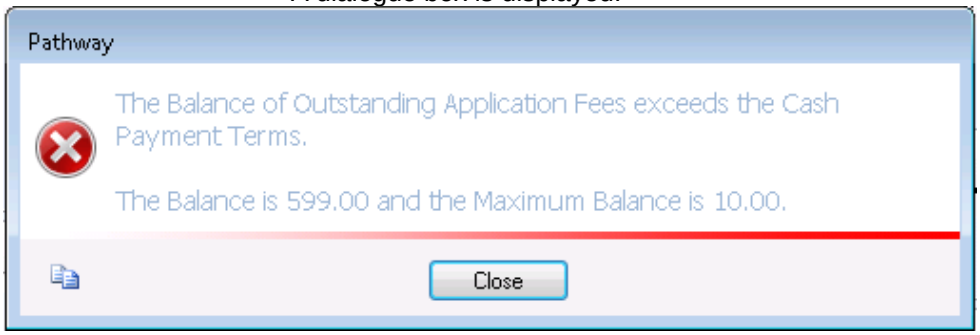
Check Contribution Fees
If checked on all Contribution Fees on the Application will be included when checking the outstanding balance on the Application.

Maximum Balance
This is the maximum dollar value allowed hwen dermining whether an Application with “Cash Payment Terms” (see Application Data Maintenance Form) may continue being processed. This value is compared to the total outstanding balance of all Application and/or Contribution Fees. If the total is greater than the Maximum Balance the Workflow Action will not be completed and will be left pending.

When the Check Payment Terms Action is initiated the following processing occurs:

- If the Payment Terms on the Application is “On Account”:
  - The Action is completed
  - Control is passed back to Workflow

- If the Payment Terms on the Application is “Cash”.
  - The balance of all outstanding Application and/or Contribution Fees (as per the parameters on the User Action) is calculated.
  - If the calculated balance is greater than the Maximum Balance specified on the User Action:
    - A dialogue box is displayed.



    - The Action is not completed and is left in a Pending state.

        - Control is passed back to Workflow.
    - If the calculated balance is less than or equal to the Maximum Balance specified on the User Action:
        - The Action is completed.
        - Control is passed back to Workflow.

Pre-Lodgement

Selecting this option will present all forms relating to the set up of the Pre-Lodgement facility for ePathway.

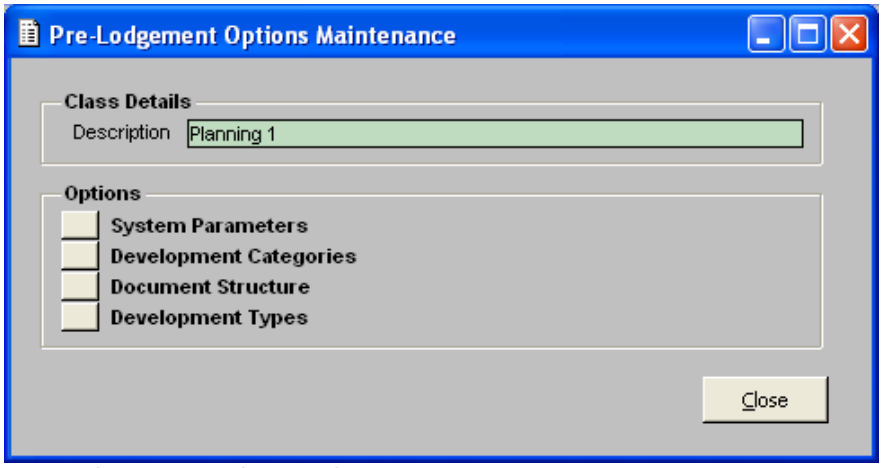
The Pre-Lodgement function enables customers to enquire, via the web and ePathway, on the potential Types of Development that may be possible for a selected Property.

The system will take into consideration the Development Plans, Zoning and Conditions applicable to the Property selected, and only display those Development Type that are relevant.

The customer may then view and/or print and/or save the displayed documentation.

Pre-Lodgement Options Maintenance

This form shows the set up options for Pre-Lodgement for ePathway.



Pre-Lodgement Options Maintenance

Class Details – Description
Displays the current class description.

System Parameters
Selecting this option will display the System Parameter Maintenance Form.

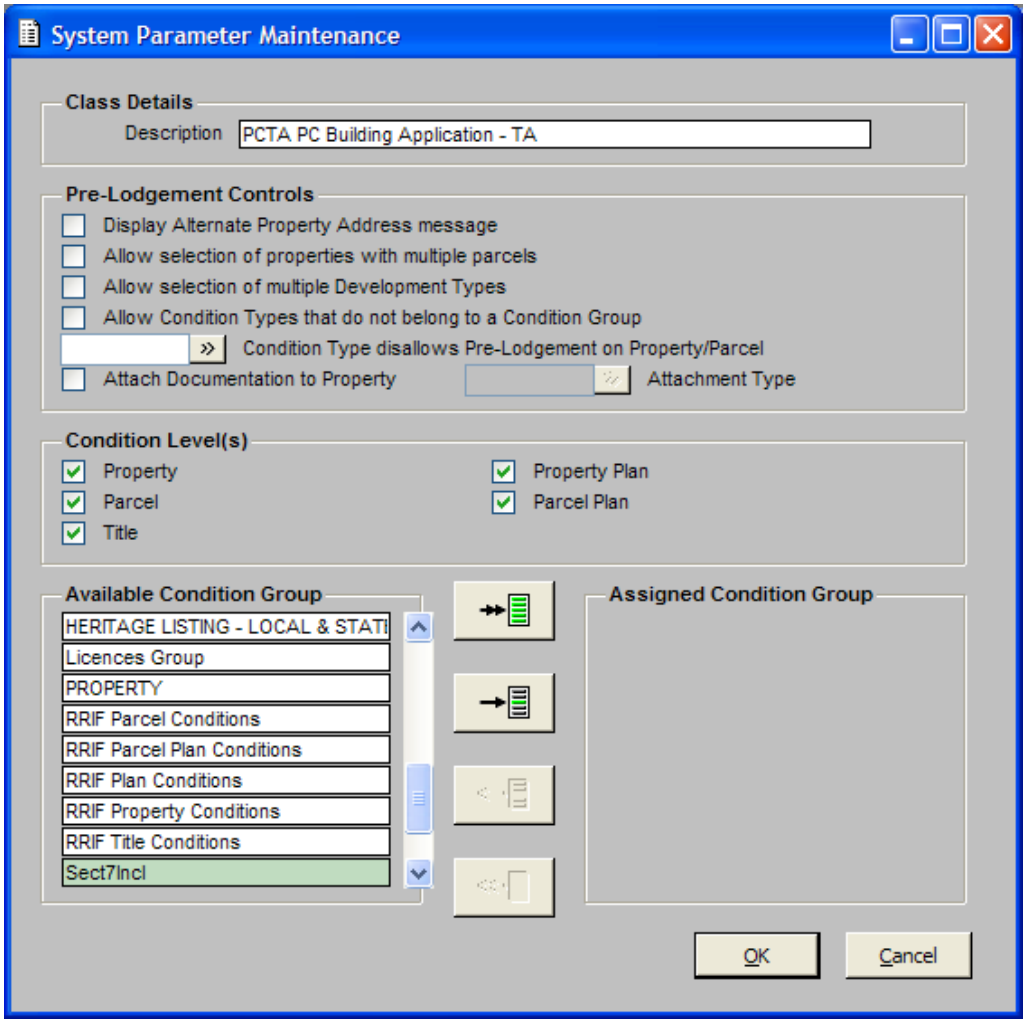
Development Categories
Selecting this option will display the Development Category Code Maintenance Form.

Document Structure
Selecting this option will display the Master Document Maintenance Form

Development types
Selecting this option will display the Development Type Maintenance Form.

System Parameter Maintenance

This form enables the user to set up the system level parameters for the Pre-Lodgement Enquiry function for ePathway.



System Parameter Maintenance Form

Class Description
This field displays the Application Class that is currently being maintained.

Parameters set up on this form only relate to this Application Class.

Display Alternate Property Address Message
If this flag is checked on the following rule will apply.
If the ePathway customer performs a search using a Property Address that is designated as an "Alternate Address" then ePathway will display a user defined message to the customer, for example "The property address you have selected is an "alternate address". The primary address is "display primary address"."

If this flag is checked off then no message will be displayed.

Allow selection of properties with multiple parcels
If this flag is checked on and the ePathway customer selects a property with more than one parcel the pre-lodgement process will proceed normally.

If this flag is checked off and the ePathway customer selects a property with more than one parcel the pre-lodgement process will stop and the user will be notified. The message to be displayed to the customer is user-definable within ePathway.

Allow selection of multiple Development Types
If this flag is checked on then the ePathway customer will be able to select more than one Development Type. For example, the customer wants information on Single Storey Dwellings and Multi Storey Dwellings.

If this flag is checked off then the ePathway customer may only select a single Development Type for their enquiry. The message to be displayed to the customer is user-definable within ePathway.

Allow Condition Types that do not belong to a Condition Group
If this flag is checked on then Conditions that do not belong to a Condition Group will be made available for display in ePathway. The individual condition types will be available on the Zone/Condition Category Maintenance form.

If this flag is checked off then only Conditions with the selected Condition Group(s) will be made available.

Condition Type Disallows Pre-Lodgement on Property/Parcel
Council may use this option to to disallow Pre-Lodgement on a Property/Parcel which has this specific Condition Type attached to the Property/Parcel.

Attach documention to Property
If this flag is checked on then ePathway will create an attachment link on the Property selected. The attachment is created when the ePathway user selects the "Build Document" button.

The attachment contains all documentation that has been presented to the customer. The attachment type used is the default Property attachment type and will be stored in the location specified in the Attachment parameters.

If this flag is checked off then no attachment will be created.

Condition Levels - Property
If this flag is checked on then the Pre-Lodgement process will check for conditions logged at the Property Level. If you do not store conditions at the Pathway Property level then this flag should be checked off.

Condition Levels – Parcel
If this flag is checked on then the Pre-Lodgement process will check for conditions logged at the Parcel Level. If you do not store conditions at the Pathway Parcel level then this flag should be checked off.

Condition Levels – Title
If this flag is checked on then the Pre-Lodgement process will check for conditions logged at the Property Title Level. If you do not store conditions at the Pathway Property Title level then this flag should be checked off.

Condition Levels – Property Plan
If this flag is checked on then the Pre-Lodgement process will check for conditions logged at the Property Plan Level. If you do not store conditions at the Pathway Property Plan level then this flag should be checked off.

Condition Levels – Parcel Plan
If this flag is checked on then the Pre-Lodgement process will check for conditions logged at the Parcel Plan Level. If you do not store conditions at the Pathway Parcel Plan level then this flag should be checked off.

Available Condition Group
This column lists all available Condition Groups. The groups available are dependent on the settings selected in the Condition Level(s) frame.
For example – if only Property Condition Level is selected then only Property Condition Groups will be displayed.

Assigned Condition Group
This column lists all assigned Condition Groups. Only the Conditions that fall within the Condition Groups in this column will be used during the Pre-Lodgement Enquiry. If the "Allow Condition Types that do not belong to a Condition Group" flag is switched on, then Condition Types that do not belong to any group will also be available.

Select All Button
This button will move all condition groups from the Available Groups column to the Assigned Groups column

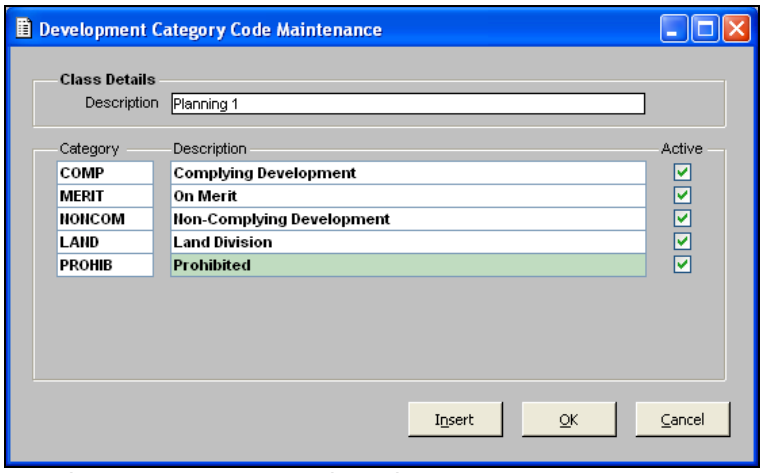
Select Button
This button will move any condition group that has been selected in the available groups column to the Assigned Groups column.

Remove Button
This button will move any condition group that has been assigned to the Available Groups column.

Remove all Button
This button will move all conditions groups from the Assigned Groups column to the Available Groups column.

Development Category Code Maintenance

This form allows you to set up the Development Categories that you will make available to ePathway.



Development Category Code Maintenance

Class Details – Description
This field displays the Application Class that is currently being maintained.

Parameters set up on this form only relate to this Application Class.

Category
A user defined category code should be entered. Up to 10 characters may be used.

This field is mandatory.

Description
This field contains the description of the category. Up to 50 characters may be used. This description will be displayed to the customer in ePathway.

This field is mandatory.

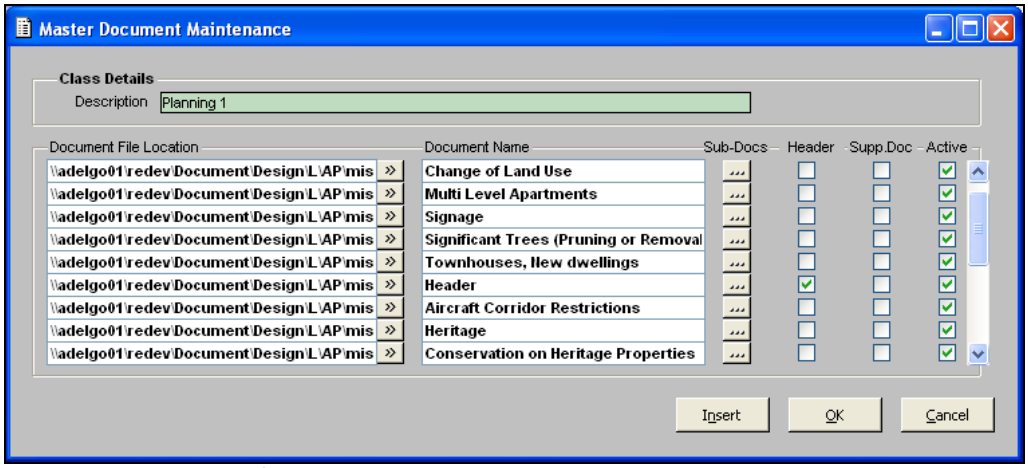
Master Document Maintenance

This form will allow you to establish all documents that you wish to display in the ePathway pre-lodgement enquiry function.

This form will allow the entry of Master Documents (where a Master and sub-document is required). You may also set up single documents on this form (i.e. where it is not a master/sub-document).

One document may be flagged as the “Header” document. This document will be the one that forms the beginning of the final document for the customer. It would typically contain the council logo, contact details and general information.

Documents may also be flagged as “Supporting” documents. These documents will be available to the customer but will not form part of the bundled “final” document.



Master Document Maintenance

Class Details – Description
This field displays the Application Class that is currently being maintained.

Parameters set up on this form only relate to this Application Class.

Document File Location
This field contains the full document path and name for any document that you wish to make available to ePathway.

The file name may be entered directly into the field or selected via the pop-up at the end of the field.

A full unc path must be used. If drive mapping is used ePathway will return an error when trying to display.

Document Name
This field contains a user defined description of the document. This document name will be displayed to assist you in setting up the Categories to document links. It is important that this field be a meaningful, unique description of the document.

It is recommended that you do not use any “special” characters in the document name e.g. ampersand (&), forward or backward slashes etc.

Sub-Docs
This detail button will take you to the Sub-Document Maintenance form.

Header
One document may be flagged as the “Header” document.

This document will be the one that forms the beginning of the final document for the customer. It would typically contain the council logo, contact details and general information.

Supp Doc
If this flag is checked on then the document will be deemed to be a “supporting” document. The document will not be included in the final “bundled” document that is presented to the user.

This document will be displayed in ePathway under a Supporting Documentation heading. It may be viewed or printed by the customer.

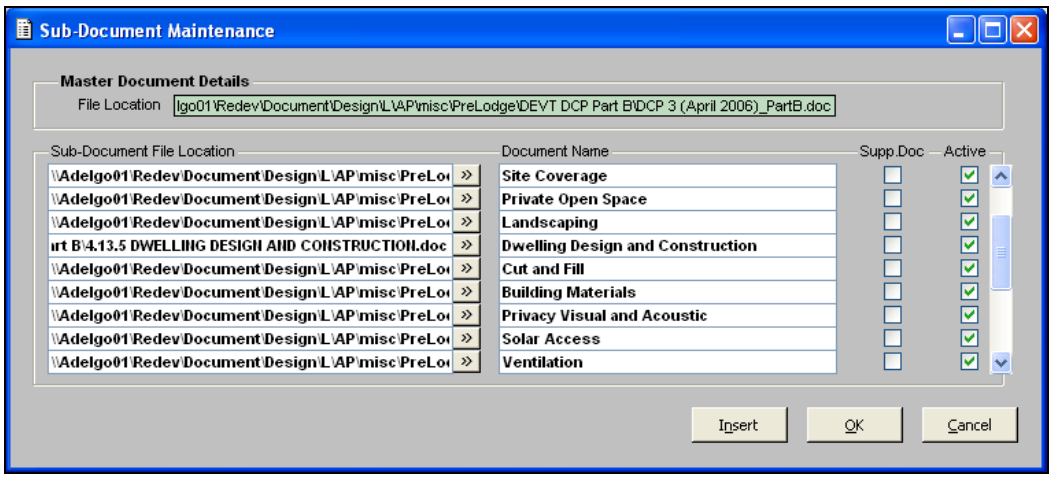
Active
If this flag is checked on then the document is active and available to the system.

If this flag is checked off then the document is no longer available.

Insert Button
Click on this Button to insert a new document record.

Sub-document Maintenance

This form will allow you to select the appropriate sub-documents. These must be valid sub-documents to the previous Master Document defined on the Master Document Maintenance form.



Sub-document Maintenance form

Master Document Details – File Location
This field displays the file location and name of the Master Document.

Sub-document file location
This field contains the full document path and name for any sub-document (of the previously selected Master document) that you wish to make available to ePathway.

The file name may be entered directly into the field or selected via the pop-up at the end of the field.

A full unc path must be used. If drive mapping is used ePathway will return an error when trying to display.

Document Name
This field contains a user defined description of the document. This document name will be displayed to assist you in setting up the Categories to document links. It is important that this field be a meaningful, unique description of the document.

Supp doc
If this flag is checked on then the document will be deemed to be a “supporting” document. The document will not be included in the final “bundled” document that is presented to the user.

This document will be displayed in ePathway under a Supporting Documentation heading. It may be viewed or printed by the customer.

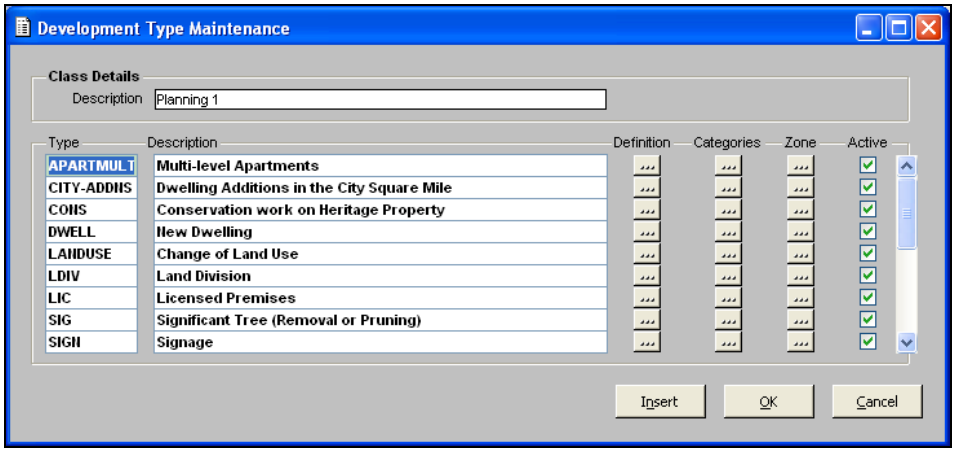
Active
If this flag is checked on then the document is active and available to the system.

If this flag is checked off then the document is no longer available.

Development Type Maintenance

This form will allow you to define all the Development Types that you wish to present to the ePathway customer.

These development types are completely user definable. The “rules” associated with the development type are established using the various detail buttons available.



Development Type Maintenance Form

Class Details – Description
This field displays the Application Class that is currently being maintained.

Parameters set up on this form only relate to this Application Class.

Type
This field contains the code for the Development Type. Up to 10 characters may be used. This field is mandatory.

Description
This field contains the description for the Development Type. Up to 50 characters may be used. This field is mandatory.

Definition
Clicking this button will take the user to the Document Maintenance form to allow for selection of documents that are to form the “Definition” of the Development Type.

Categories
Clicking this button will take the user to the Development type Category Maintenance Form. This form will allow you to select the Categories under which this Development Type falls.

Zone
Clicking this button will take the user to the Development type Zone Maintenance Form. This form will allow you to select the various Zones that this Development Type applies to.

Active
If this flag is checked on then the Development Type is active and available to the system.

If this flag is checked off then the Development Type is no longer available.

Document Maintenance

This form displays all of the documents available to the Pre-Lodgement System.

As you can see, the descriptions are essential in identifying the correct document that you wish to assign.

This form is a multi-use form and will be presented at various points during the document assignment processes.

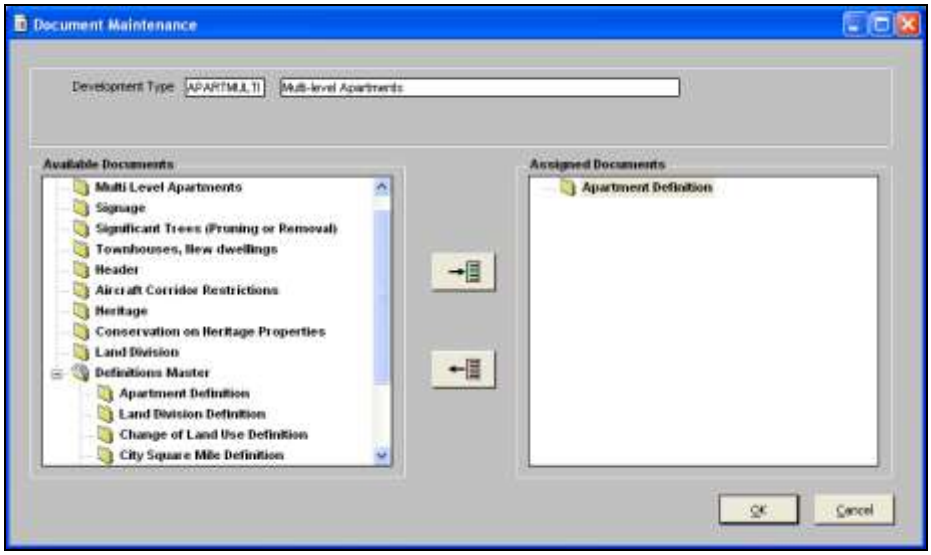
Documents are assigned by selecting from the Available Documents column and moving to the Assigned Documents column.

If you assign a Master Document then all of its sub-documents will also be assigned. Conversely, you may just assign a single sub-document.

Development Type - Definitions
If you have called this form from the Development Type Maintenance – Definitions button, then the assigned documents will be presented on ePathway next to the Development Type. These Definition Documents do not form part of the final "bundled" document.

Development Type – Category
If you have called this form from the Development Type – Category Maintenance form then the documents assigned will be presented under the relevant Development/Category type. The documents selected here will form part of the final "bundled" document.

Development Type – Zone Maintenance – Condition
If you have called this form from the Development Type – Zone Type – Condition Type form then the documents assigned will be presented only if a Property falls in the relevant Zone and has a relevant Condition. The documents selected here will form part of the final "bundled" document if the selected zone and condition apply the property.



Development Type
This field will display the Development Type that you are assigning documents for.

Available Documents
All documents available for selection are displayed in this column.

Where a master document is included then a "+" sign will be displayed to the left of the master document name. This will allow you to expand/collapse the sub-documents underneath.

Any document in this column may be selected for inclusion.

Select Button
Click this button to move a document from Available Documents to Assigned Documents.

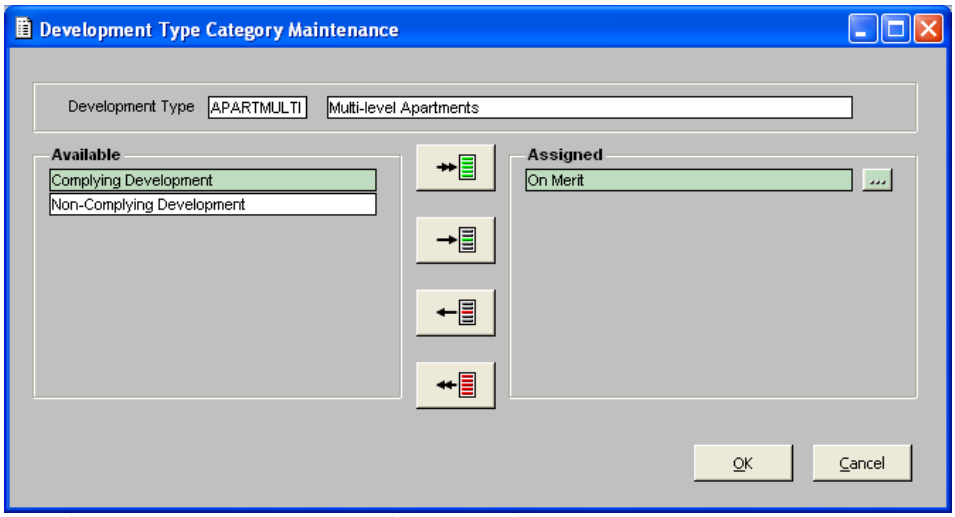
Remove Button
Click this button to move a document from Assigned Documents to Available Documents.

Assigned Documents
Documents in this column have been selected for display in ePathway.

Development Type Category Maintenance

This form allows to associate the valid Categories to each Development Type. One or many Categories may be assigned.

Documents may then be assigned that are unique or significant to a Development Type/Category combination.



Development Type Category Maintenance form

Development Type and Description
Displays the Development Type for which you are assigning the various Category(s).

Available Categories
This column shows all available Categories.

Use the Select/Remove buttons to assign.

At least one Category must be assigned.

Assigned Categories
This column shows all assigned Categories for the selected Development Type.

Select All Button
This button will move all available Categories to the Assigned Categories column.

Select Button
This button will move any individual category that has been selected in the available category column to the Assigned Categories column.

Remove Button
This button will move any category that has been assigned to the Available Categories column.

Remove all Button
This button will move all Categories from the Assigned Groups column to the Available Categories column.

Development Type Zone Maintenance

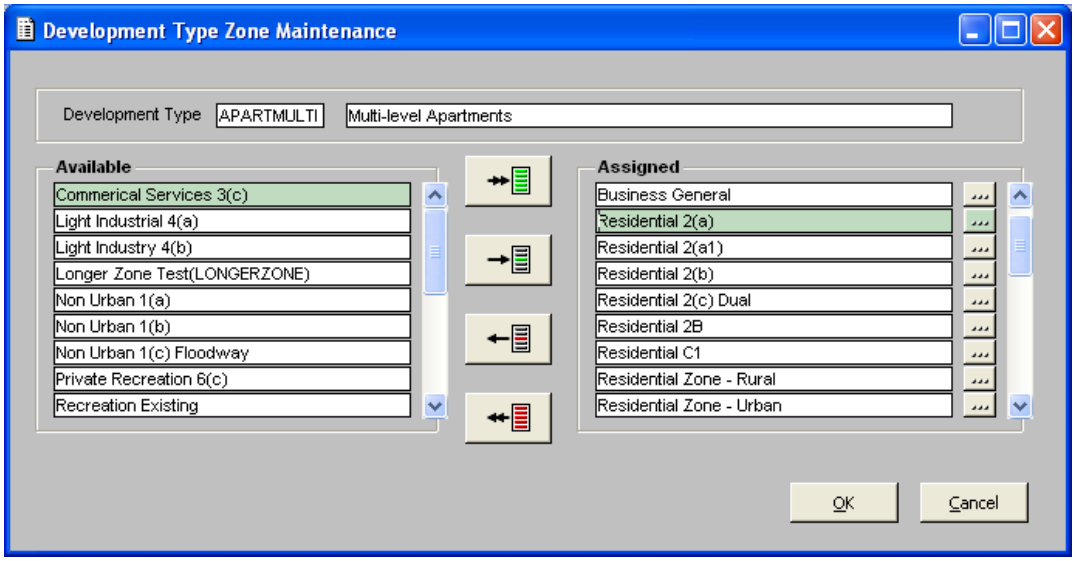
This column will allow you to assign the valid Zones to a Development Type.

If a zone is not selected against a Development Type then any Property in that Zone will not display that Development type.

For example a Development Type may be prohibited in a certain zone, therefore that zone should not be selected. By doing this, in ePathway, if a Property is selected for that Zone then that Development Type will not be displayed.

In the example below for the Development Type of Multi-level Apartments, any property within a zone of Light Industrial 4(a) will not have Multi-Level Apartments available for selection.

If a Development Type is relevant to all zones then all zones should be selected.



Development Type Zone Maintenance Form

Development type
This field displays the Development Type for which you are assigning Zones.

Available Zones
This column displays all zones available for selection. Any property falling within a zone in this column would not be able to select the Development type.

Assigned Zones
This column displays all zones associated with the Development Type.

Any property falling within a zone in this column would have the Development Type available for selection.

Select All Button
This button will move all available Zones to the Assigned Zones column.

Select Button
This button will move any individual zone that has been selected in the available Zone column to the Assigned Zone column.

Remove Button
This button will move any Zone that has been assigned to the Available Zone column.

Remove all Button
This button will move all Zones from the Assigned Zones column to the Available Zones column.

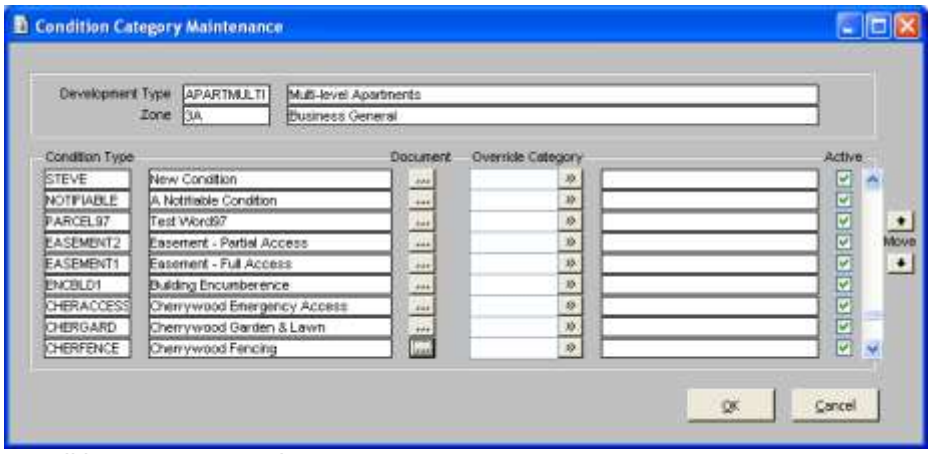
Condition Category Maintenance

This form has two purposes.

It will allow the selection of a document to be made where a particular combination of Development Type/Zone/Condition Type exists.

It will also allow the Category to be changed to an Overriding Category should a certain condition exist on a Property within a Zone. For example, the customer may have selected a Development Type of Dwelling which is normally a Permitted use, but because the Property falls within a Flood Plain and has a “Flood” condition on it, then the Category may be automatically overridden to a Prohibited Category.

This form is also hierarchical in nature, and the order of the Overriding Categories is able to be sequenced. Therefore if a property contains two conditions and each condition triggers a different overriding category, then the top most category will take precedence.



Condition Category Maintenance Form

Development type and Description
This field contains the Development Type that you are maintaining.

Zone Type and Description
This field contains the Zone code and description that you are maintaing.

Condition Type
This field contains the Condition Type and Description.

From this field you may select the detail button at the end of the field to assign documents specific to this condition/zone/development type combination.

Document
This button will display the Document Maintenance Form.

From that form you can select the document to assign for this specific condition/zone/development Type combination.

Override Category
This field contains an overriding Category (if required) and its description.

The Category may be changed to an Overriding Category should a certain condition exist on a Property within a Zone. For example, the customer may have selected a Development Type of Dwelling which is normally a Permitted use, but because the Property falls within a Flood Plain and has a “Flood” condition on it, then the Category may be automatically overridden to a Prohibited Category.

The category code may be entered directly into the field or alternatively use the pop up.

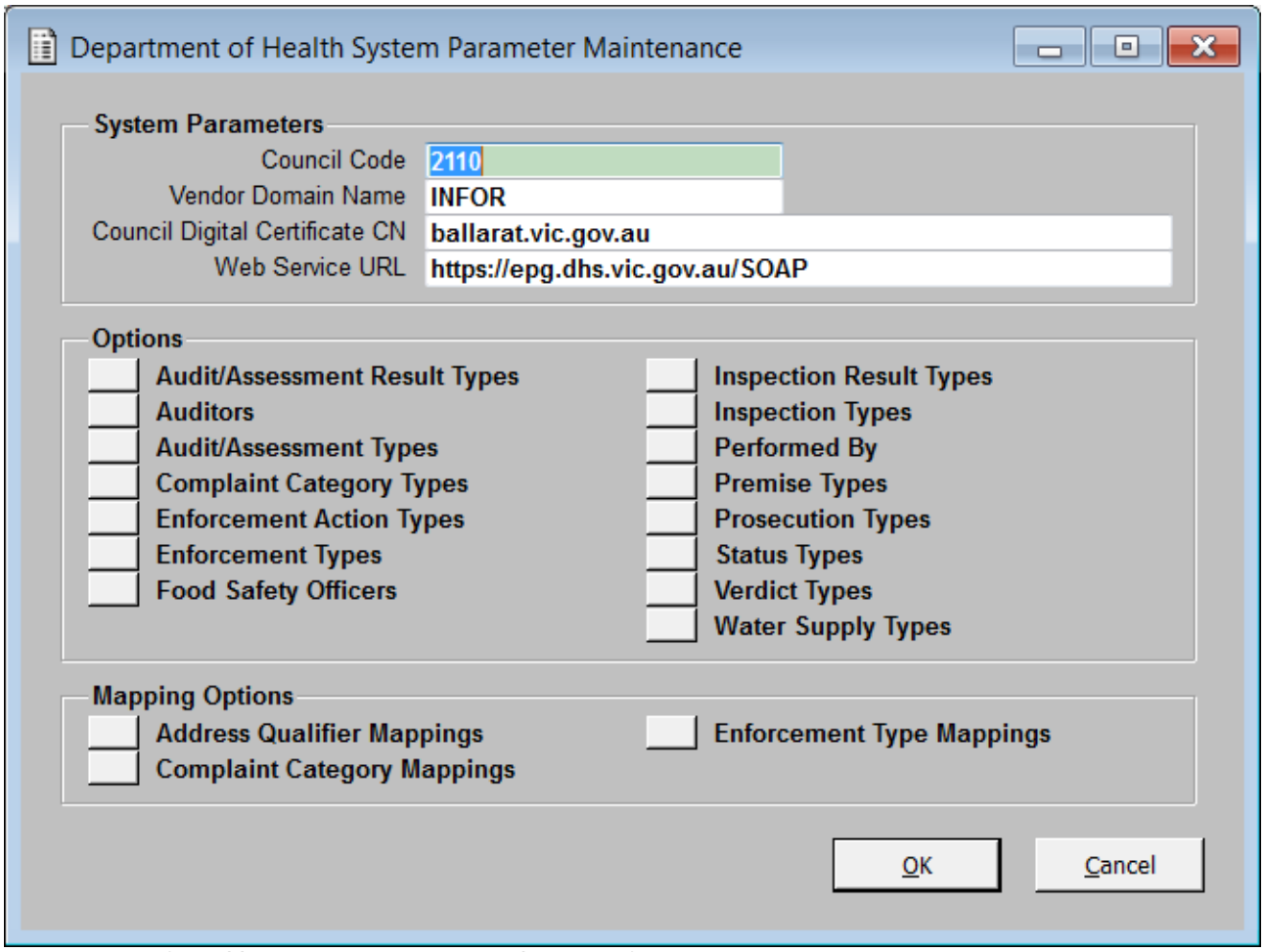
Move Up/Down Buttons
These buttons may be used to re-sequence the overriding categories into the correct order.

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

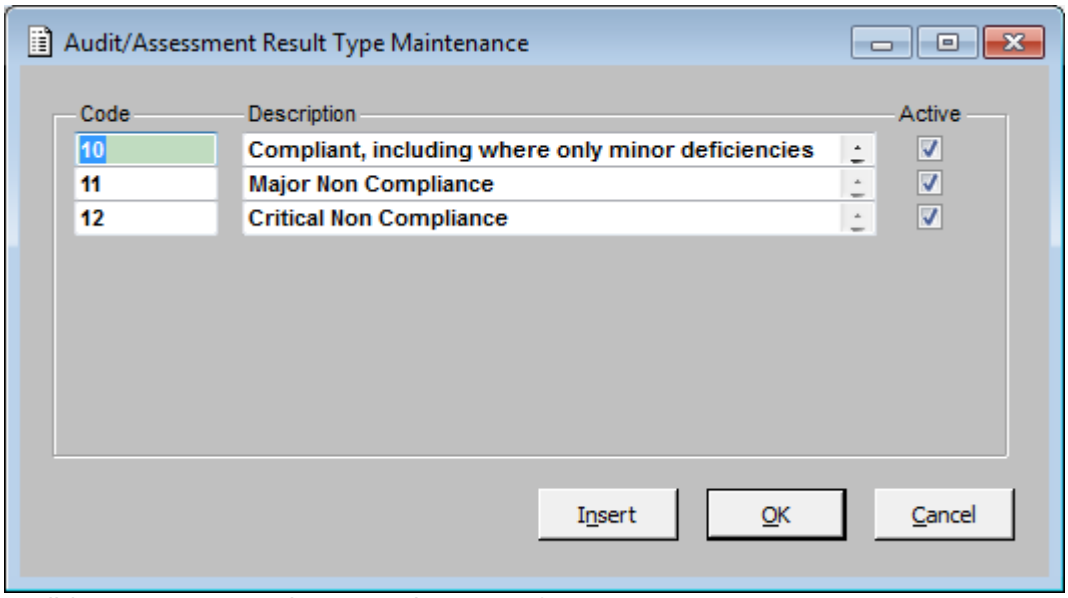
System Parameters – Vendor Domain Name
The Vendor Domain Name field holds the name of the Software vendor responsible for providing the Food Safety reporting functionality. In the case of Pathway, this is INFOR.

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.



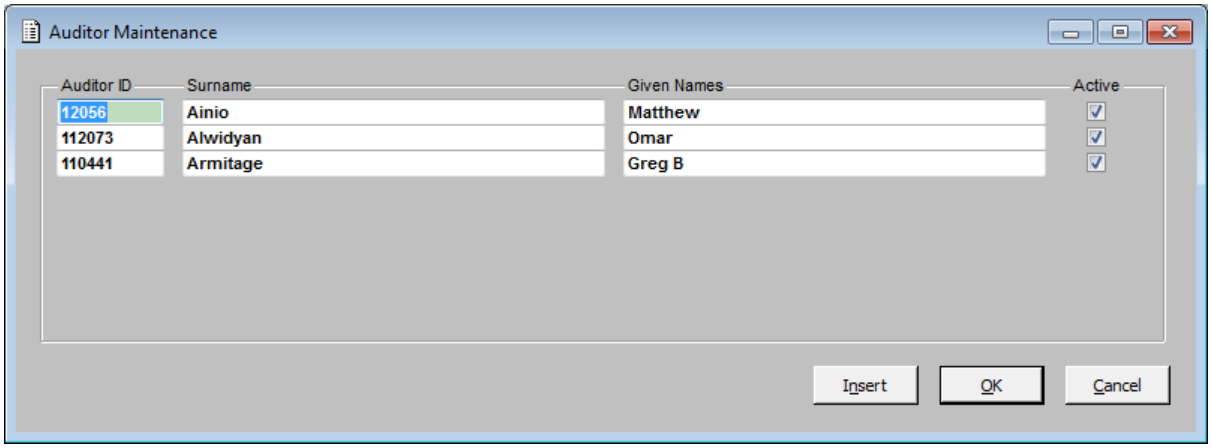
Audit/Assessment Result Type Maintenance form

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 .

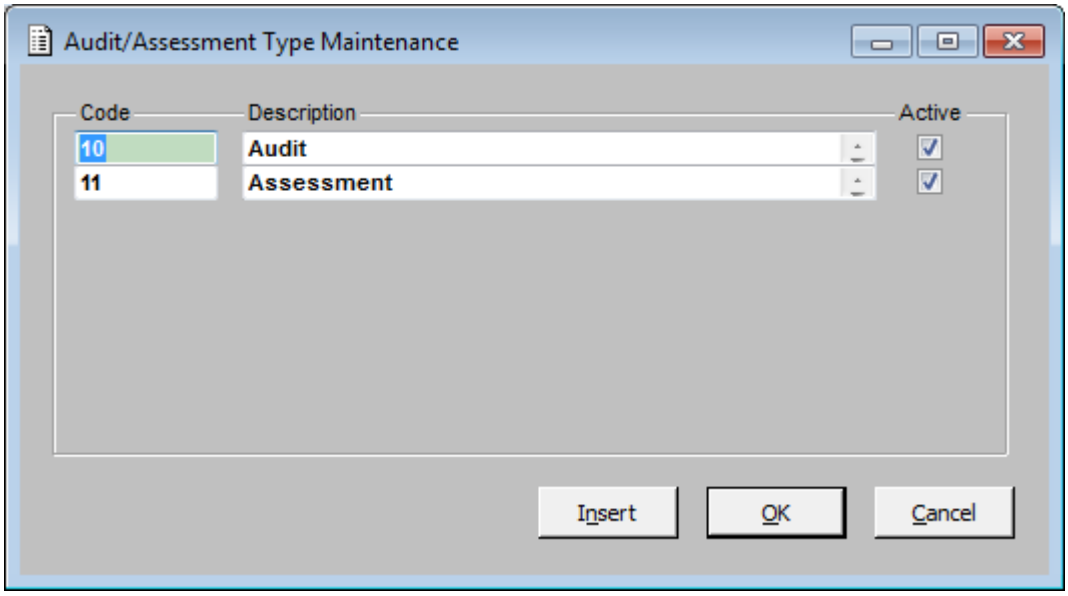
Auditor Maintenance - Surname
This field is where the surname of the Auditor is entered.

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

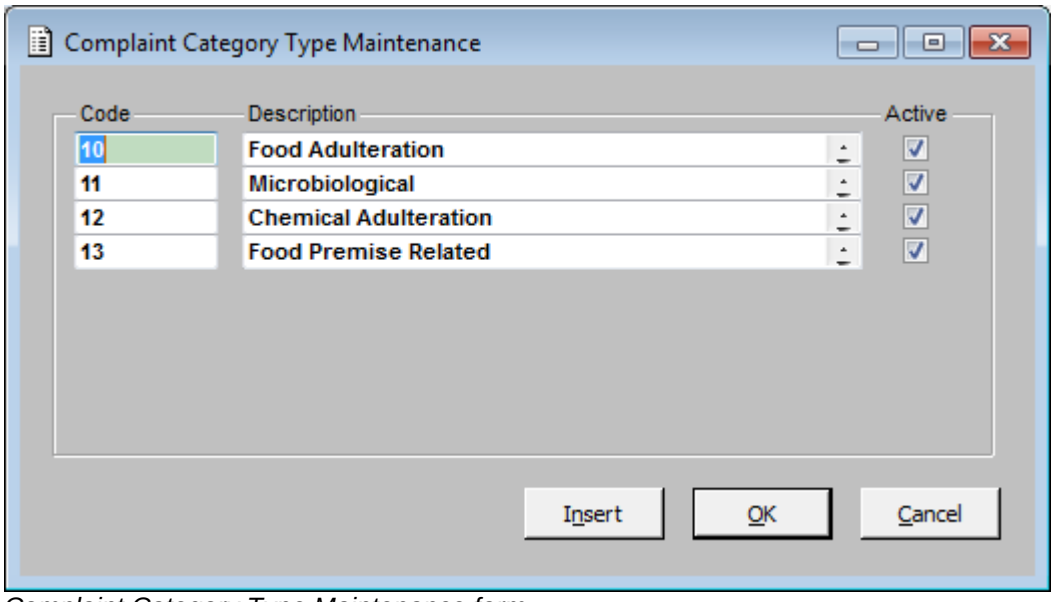
Audit/Assessment – Code
Unique code that identifies the Audit/Assessment Type.

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

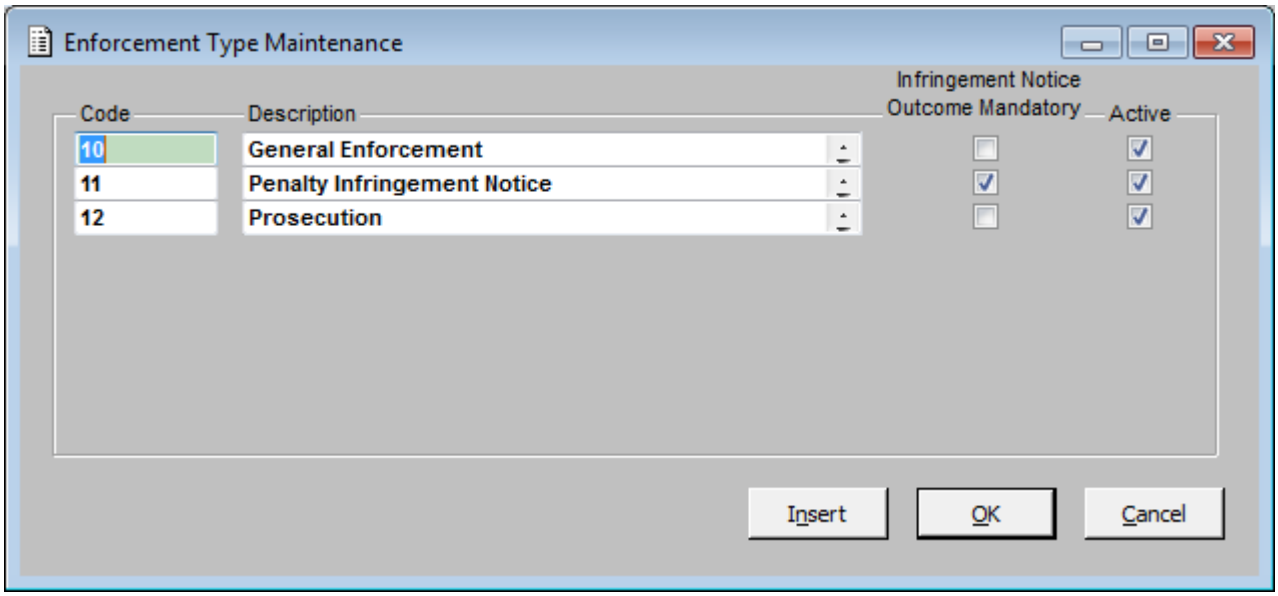
Complaint Category Types - Code
This is the complaint code issued by the Department of Health.

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

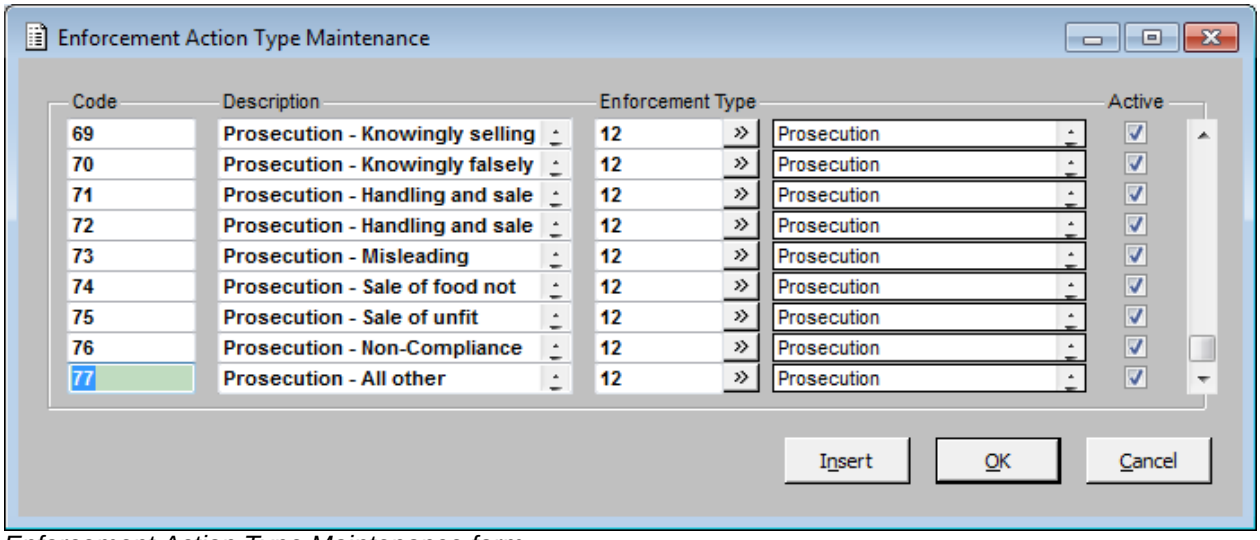
Enforcement types – Code
This is the enforcement type code issued by the Department of Health.

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.

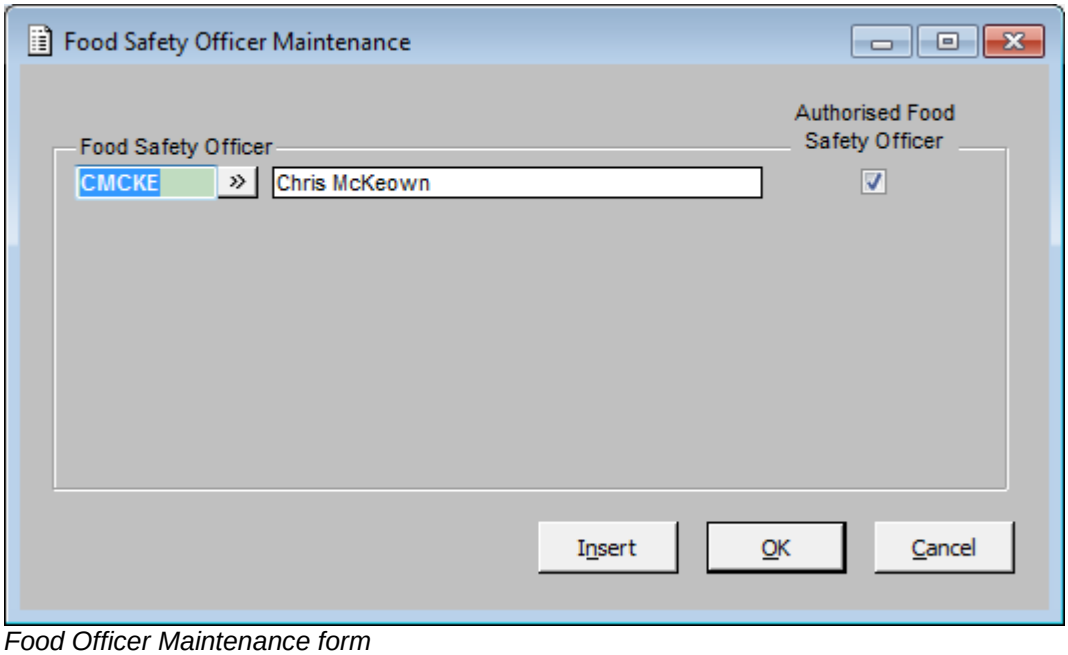
Enforcement Action Types – Enforcement Type
This field allows Council to link the Enforcement Action Type with the Enforcement Type.

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

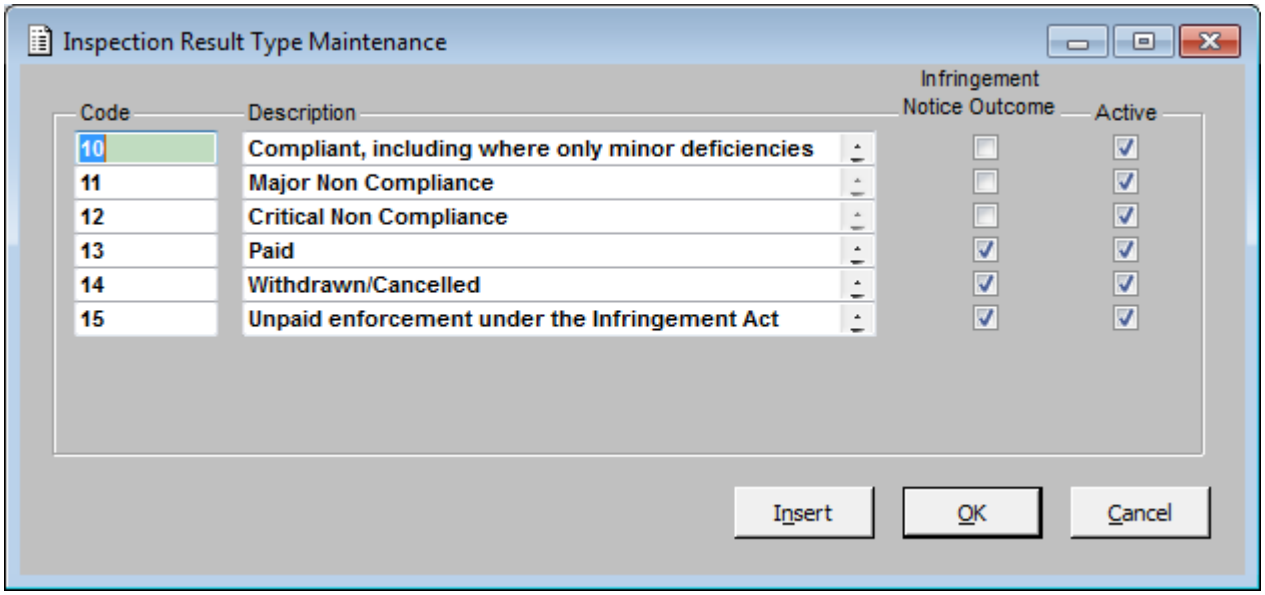
Food Safety Officer Maintenance – Food Safety Officer
This field allows Council the ability to identify members of staff who are designated as Food Safety Officers. By using the pop up button the user will be presented with the ability to select the relevant Food Safety Officer from the list of user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

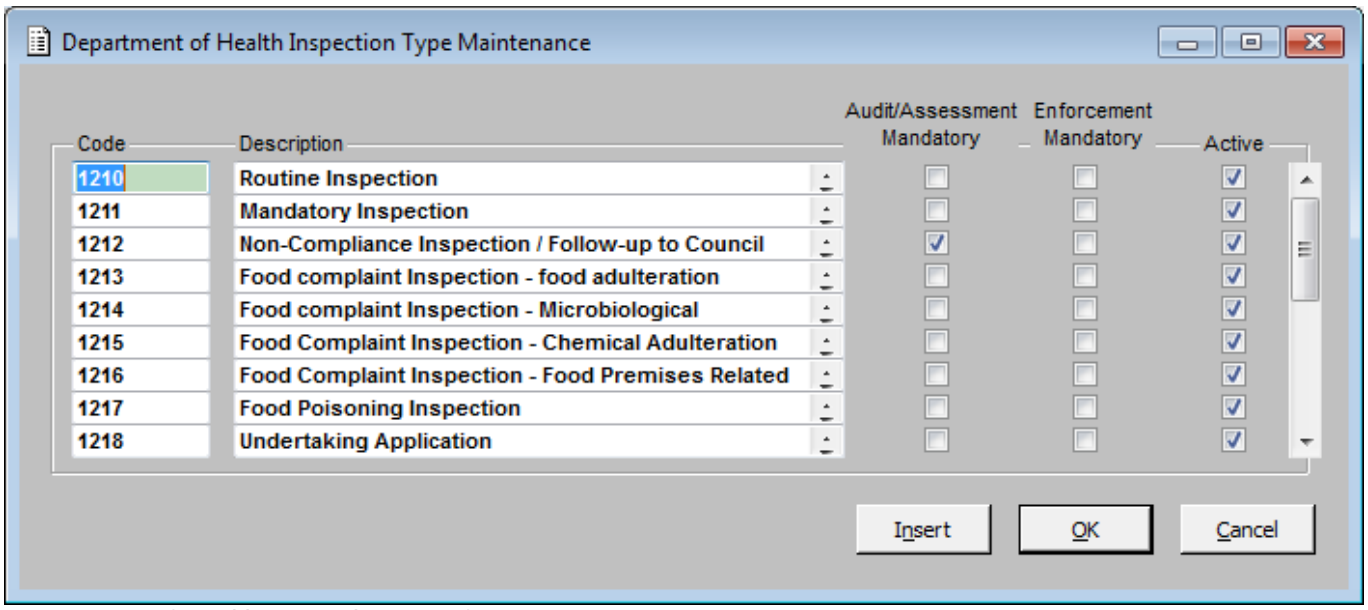
Inspection Result Types Maintenance – Description
This field allows for the input of the Inspections Results Description - Currently the 3 Inspection Result Type Descriptions to have an Infringement Notice Outcome have been pre- checked on any new descriptions issued by the Department of Health will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

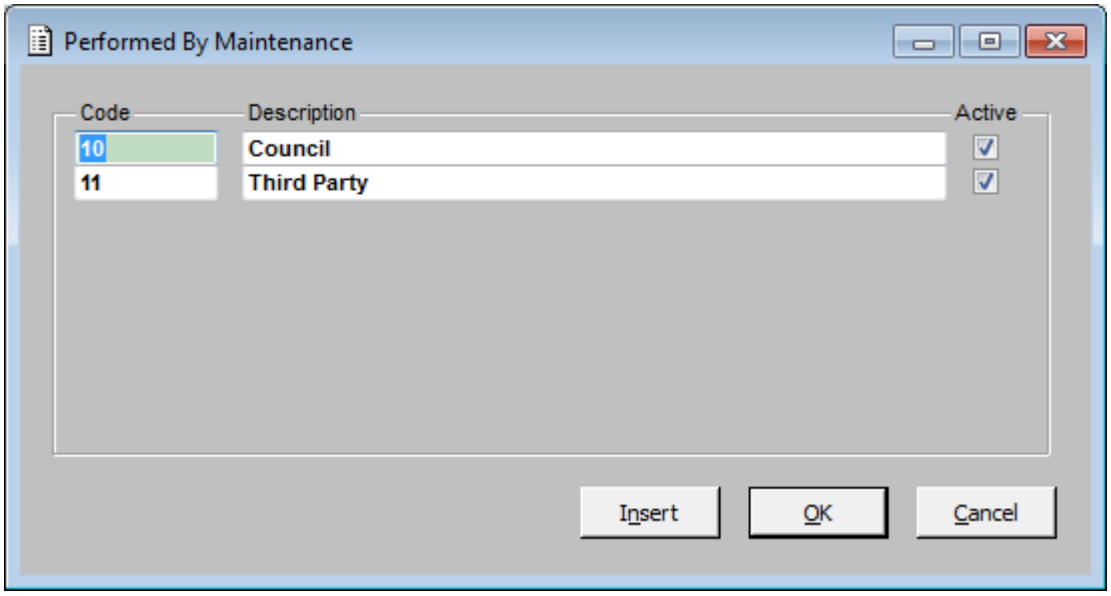
Department of Health Inspection Type Maintenance – Audit/ Assessment Mandatory
This flag indicates whether a link to a pre-existing Audit/Assessment record is mandatory. This parameter comes into play when maintaining an Inspection, which may be the result of an Audit/Assessment previously, conducted.

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

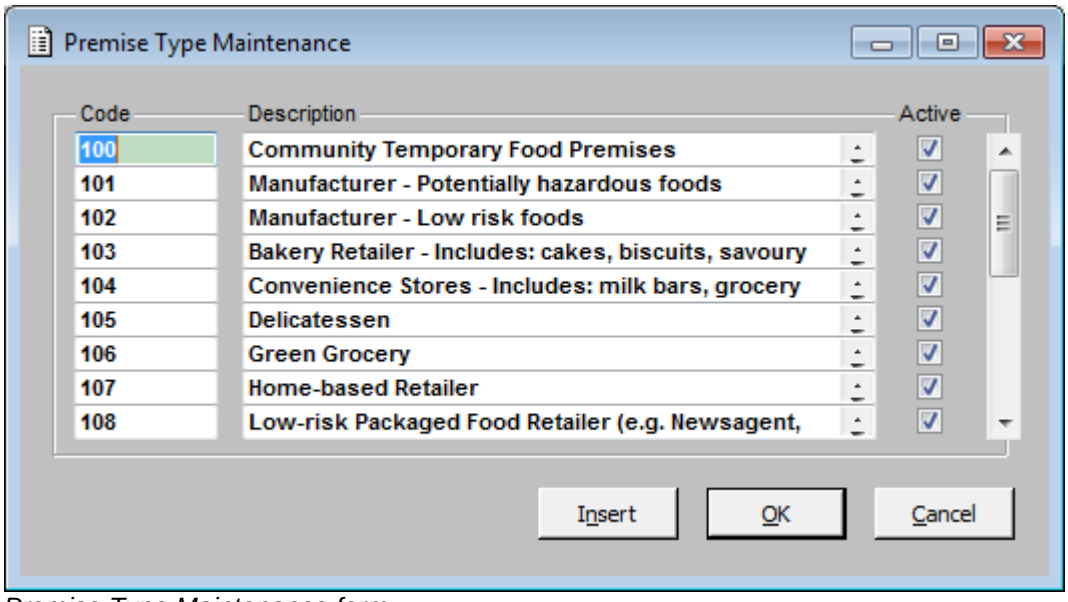
Performed by Maintenance – Code
This is a standard Pathway parameter form with code and description. These will be pre-populated with the two current codes – 10 – Council and 11 – Third Party.

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

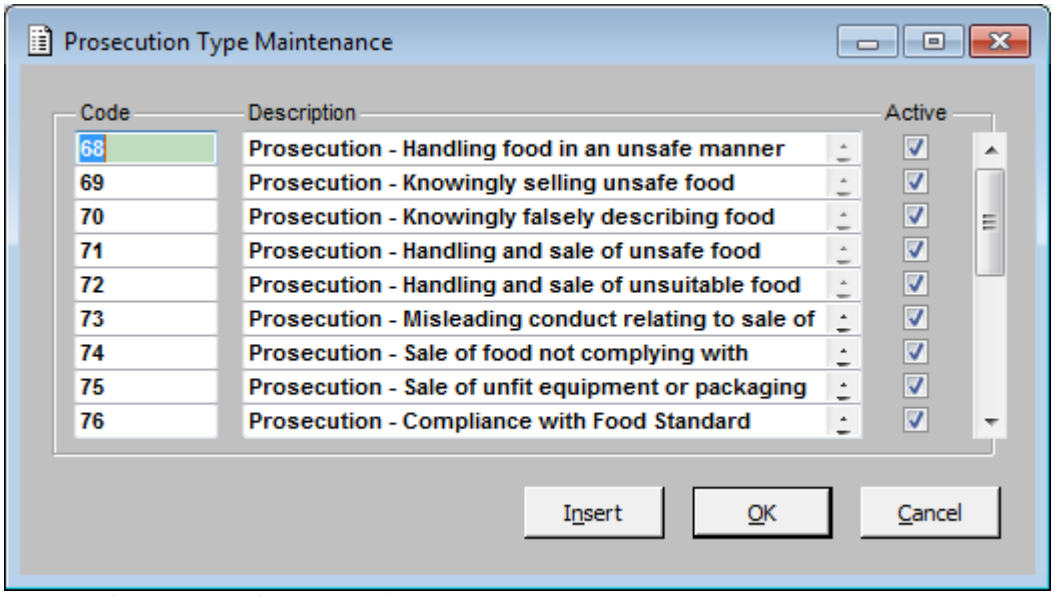
This field contains the Premise Type Code.

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

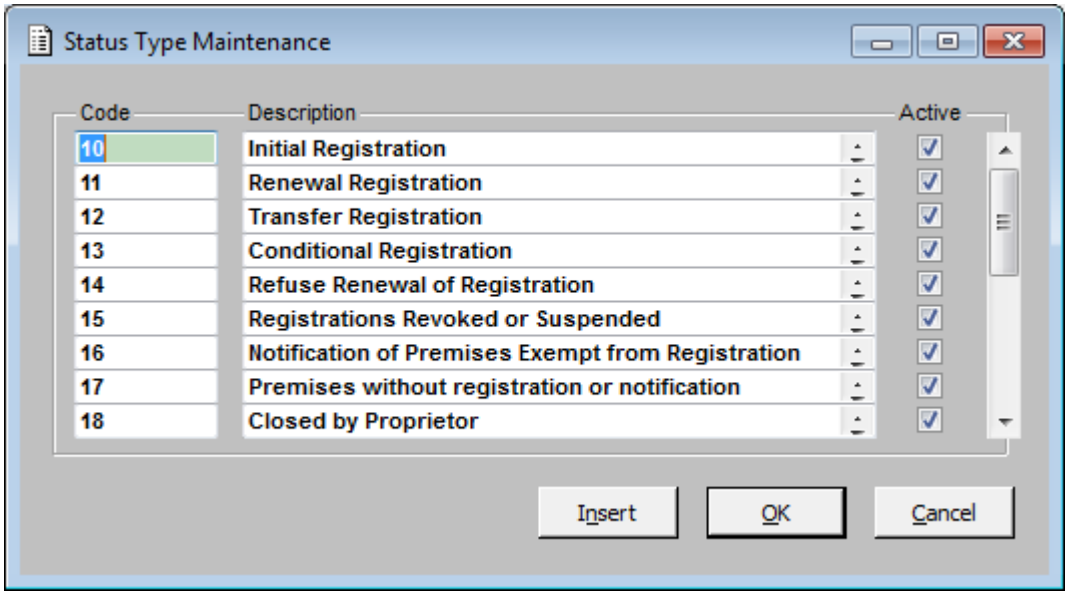
Prosecution Type Maintenance – Code
This field contains the Code for the Prosecution type – this has been prepopulated with the currently known codes.

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

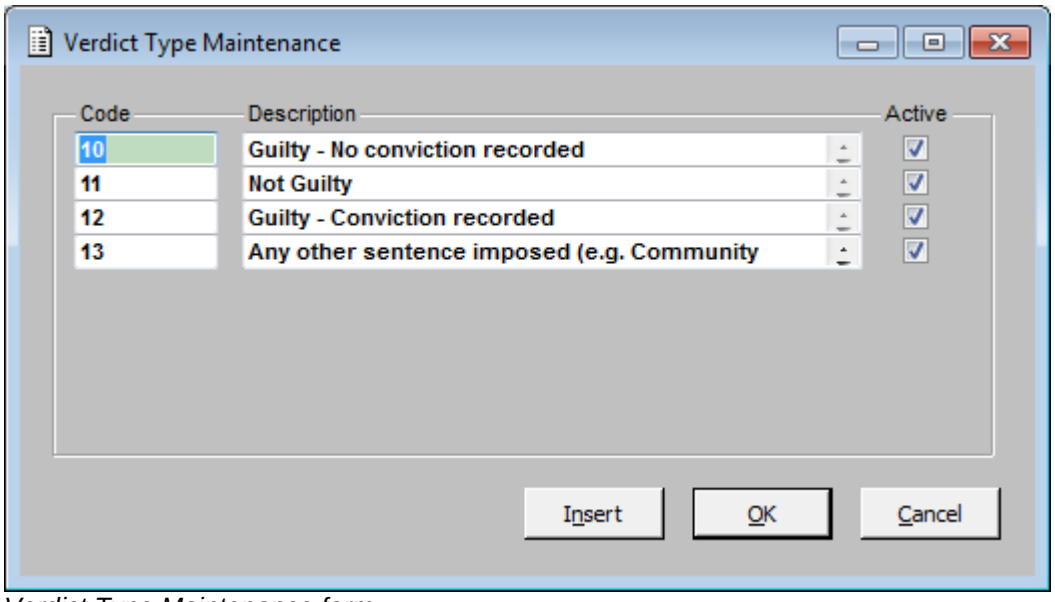
Status Type Maintenance – Code
This field contains the code for the Status Type Maintenance – these have been prepopulated with the currently known codes.

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.

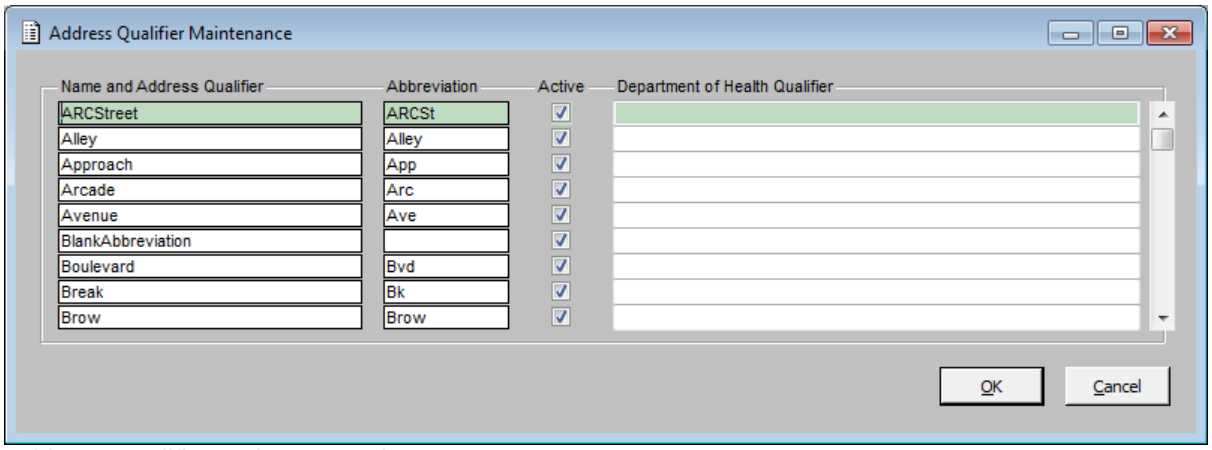
Address Qualifier Maintenance

***** 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.

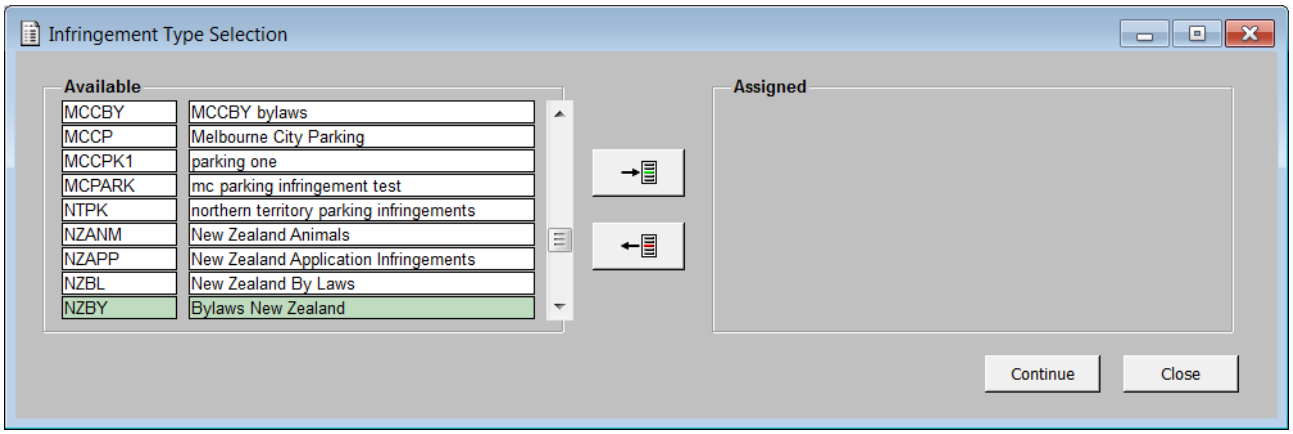
Enforcement Type Mapping Maintenance

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.

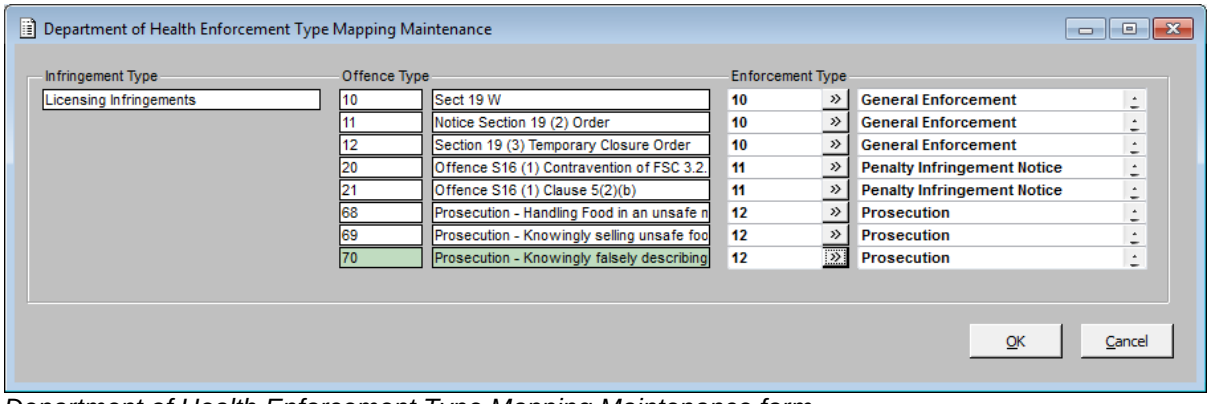


Infringement Type Selection form

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.

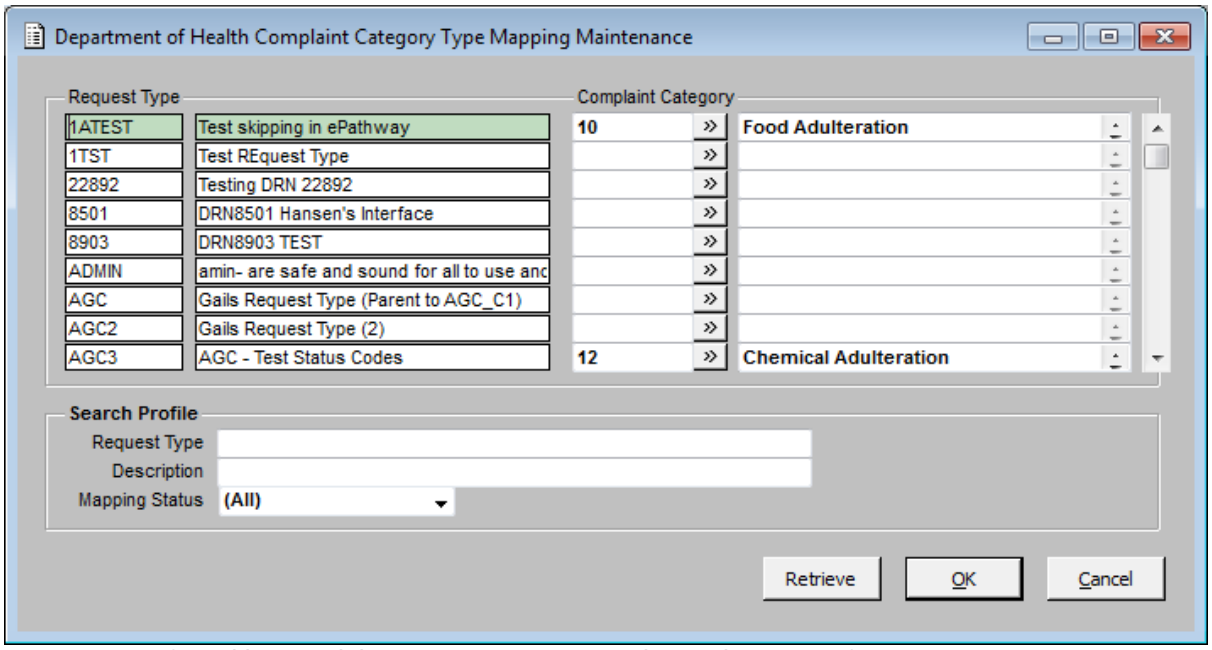
Department of Health Enforcement Type Mapping Maintenance – Department of Health Enforcement Type Description
This field is populated with the description of the selected Department of Health Enforcement Type.

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.

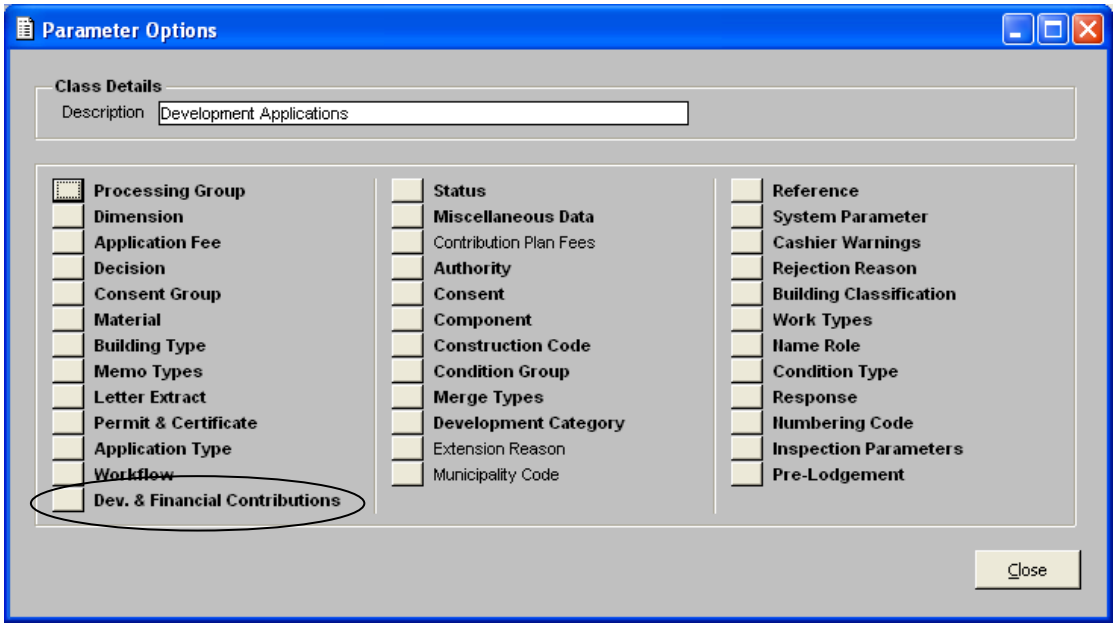
Department of Health Complaint Category Type Mapping Maintenance – Search Profile – Description
To assist in selecting a particular request type it is possible to utilitse the standard Pathway search functionality of entering all or part of the description to select the required Request Type.

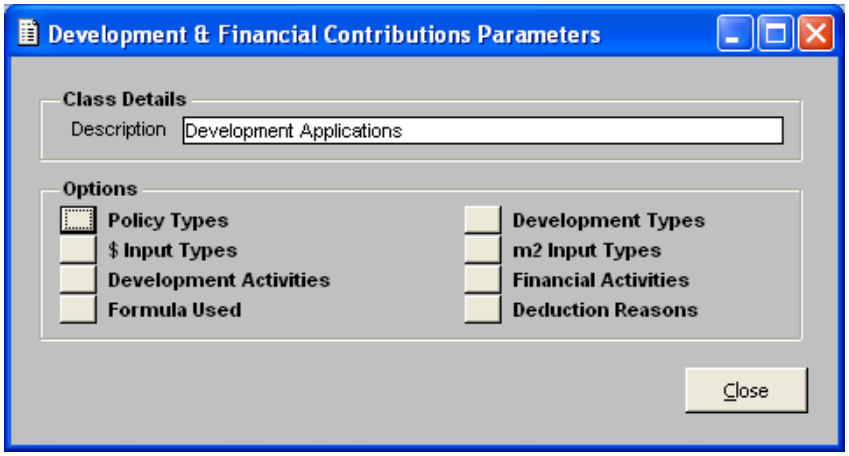
Department of Health Complaint Category Type Mapping Maintenance – Search Profile – Mapping Status
This fiel allows for further filtering of the selection criteria if required. The possible selections here are ALL, ASSIGNED and UNASSIGNED.

Development & Financial Contributions

By selecting this Option, a new screen is displayed with lists of Parameters which are used in the Development and Financial Contributions Functionality via separate options of:

- Policy Types
- Development Types
- $ Input Types
- M2 Input Types
- Development Activities
- Financial Activities
- Formula Used
- Deduction Reason

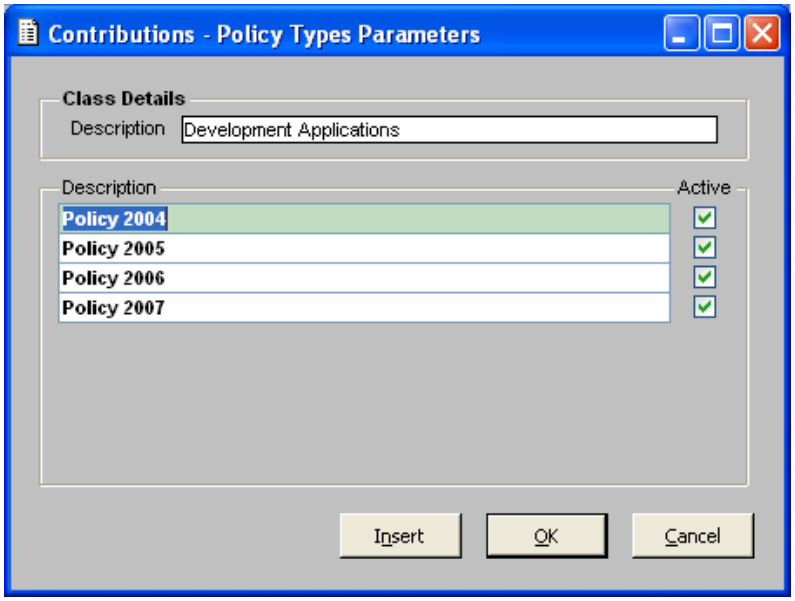




Development & Financial Contributions Parameters Form

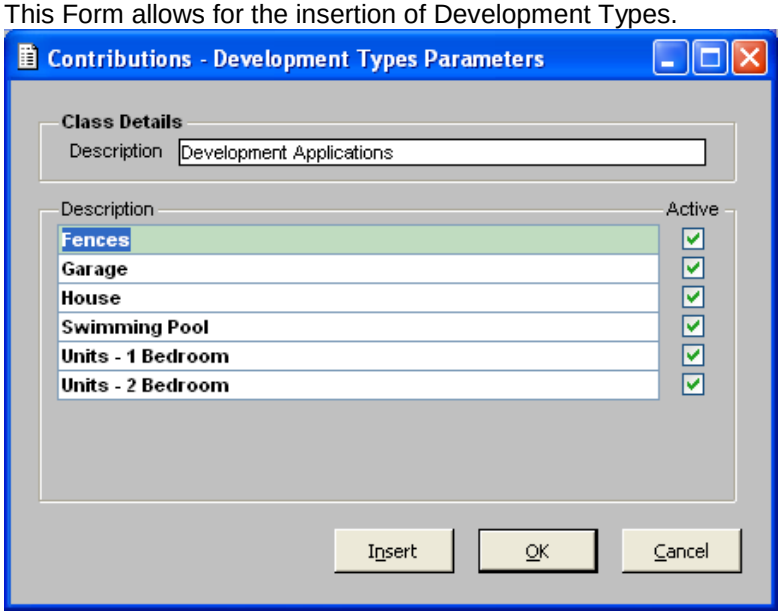
Examples of Development & Contribution Types Parameters
Access each Option and enter Parameters which can be used in the Development and Financial Contribution Details for Application.

Development & Financial Contributions Parameters – Policy Types
This form allows for the insertion of Policy Types.



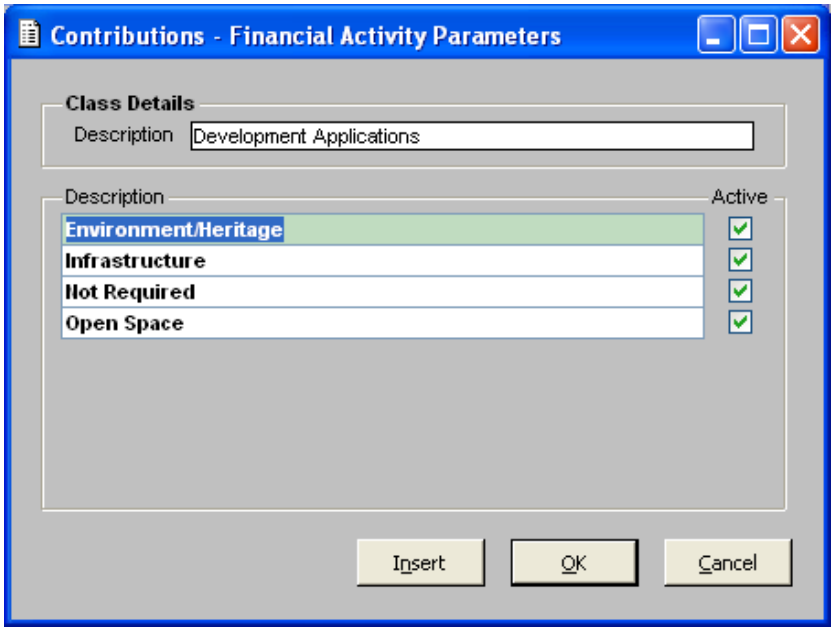
Examples of Contributions – Policy Types Parameters.

Development & Financial Contributions Parameters – Development Types
This Form allows for the insertion of Development Types.

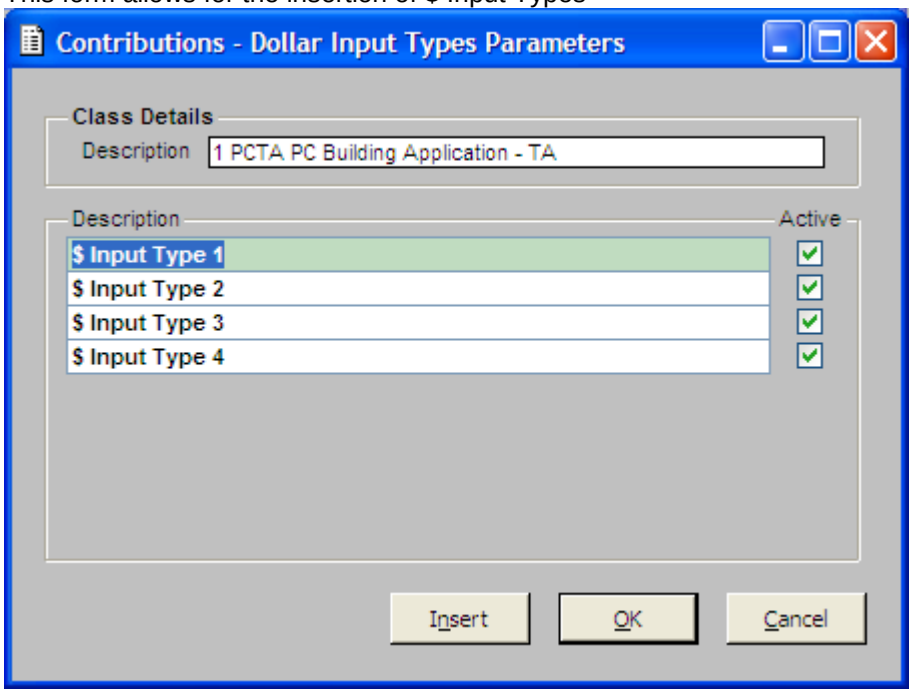


Example of Contributions – Development Types Parameters

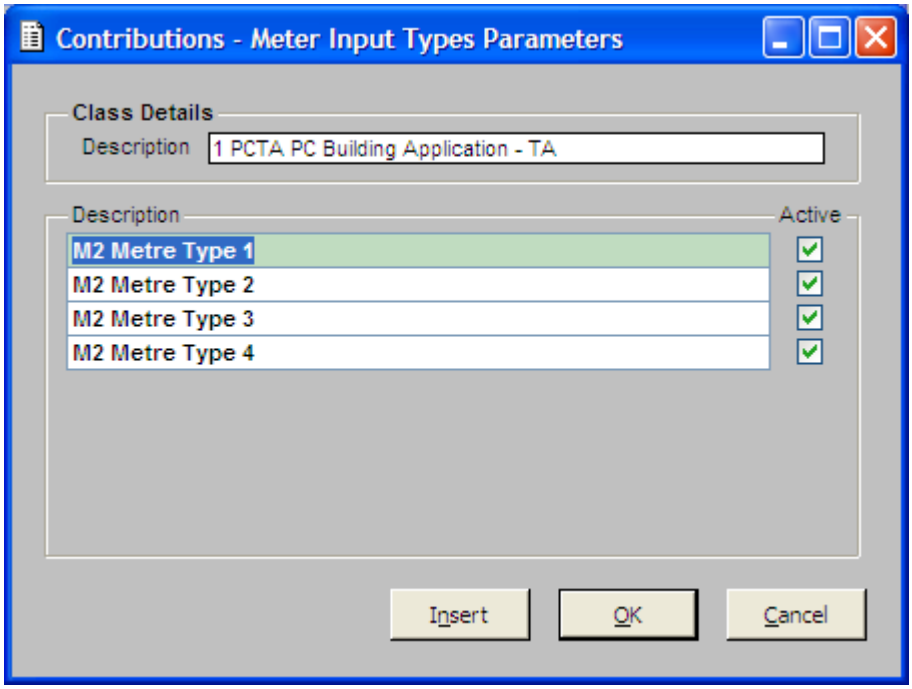
Development & Financial Contributions Parameters – Financial Activities
This form allows for the insertion of Financial Activity Parameters.



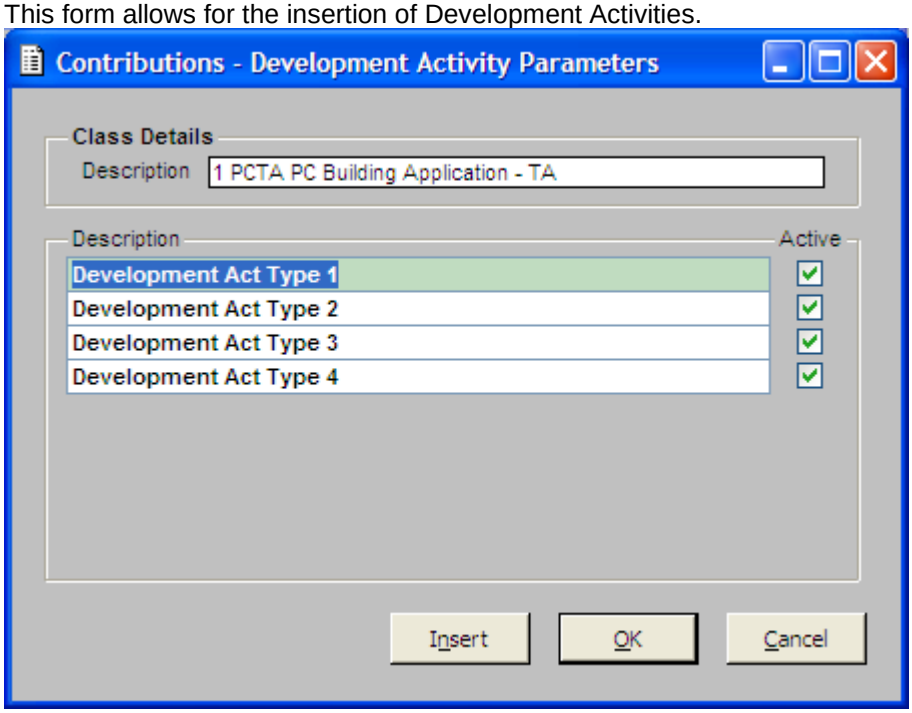
Development & Financial Contributions Parameters – $ Input Types
This form allows for the insertion of $ Input Types



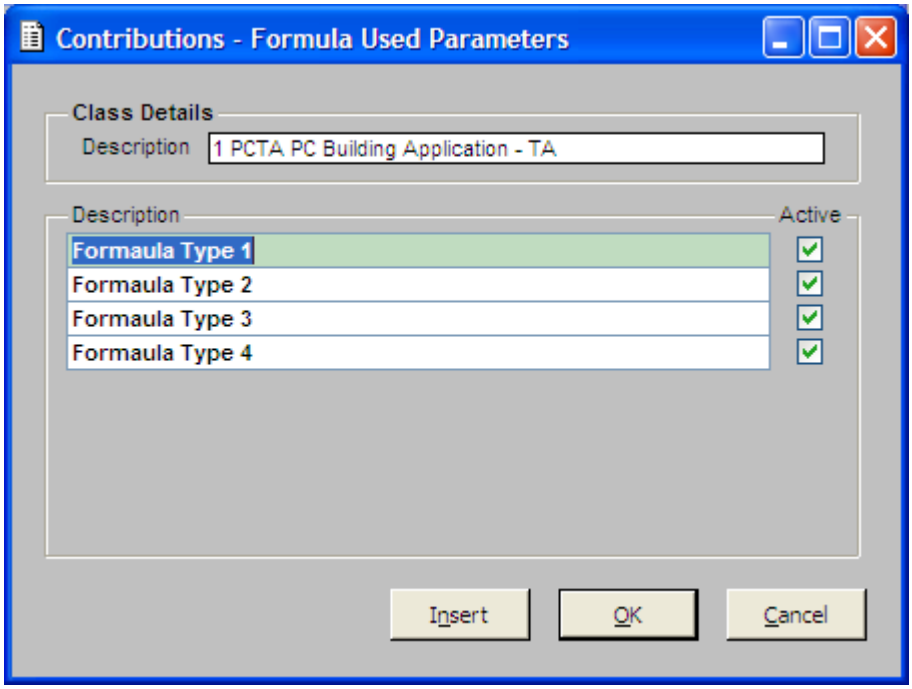
Development & Financial Contributions Parameters – m2 Input Types
This form allows for the insertion of m2 Input types.



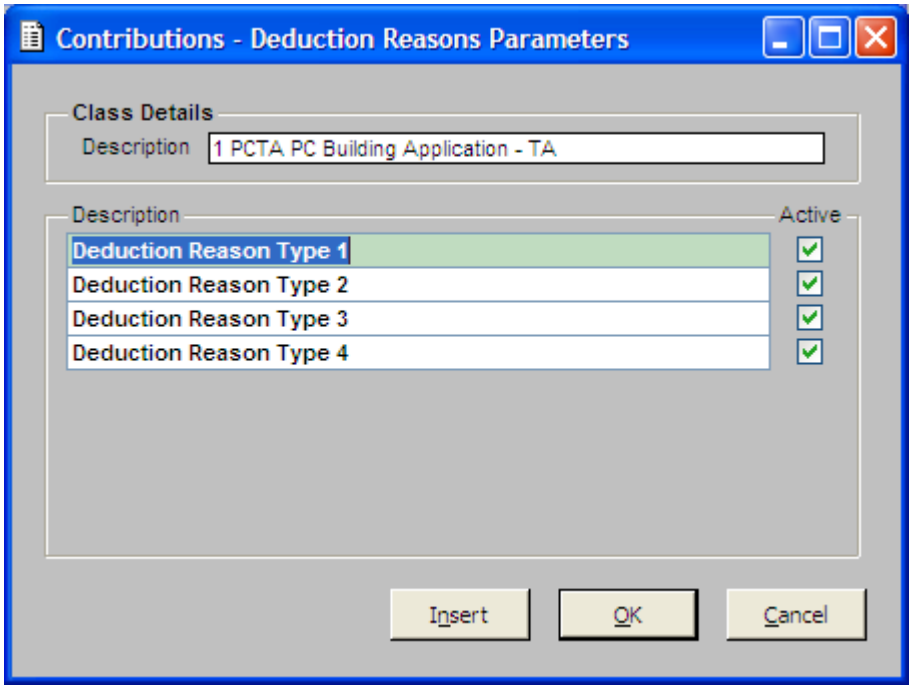
Development & Financial Contributions Parameters – Development Activities
This form allows for the insertion of Development Activities.



Development & Financial Contributions Parameters – Formula Used.
This form allows for the insertion of information of the Formula Used.



Development & Financial Contributions Parameters – Deduction Reasons.
This form allows for the insertion of Deduction Reasons.



System Parameters

The following topic is covered in this section:

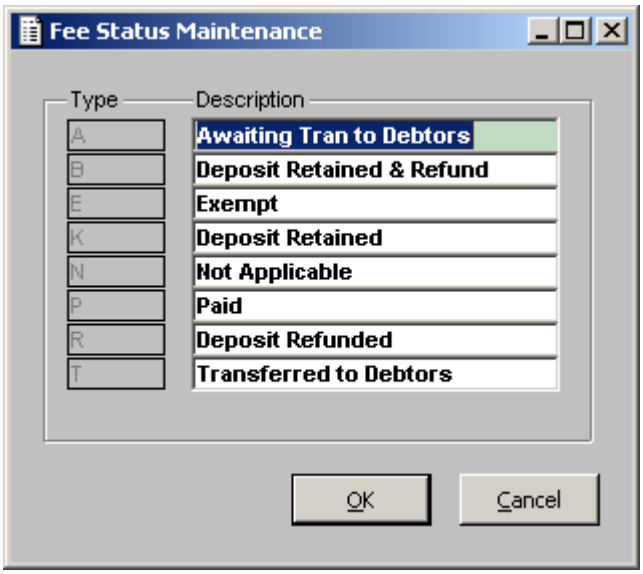
Application Parameters

This section is related to parameters that are set within the System Parameters and are not maintained by the User. For further information on these forms please contact the Infor Helpdesk.

Application Parameters

Fee Status Maintenance Form

This form is related to parameters that are set within the System Parameters and are not maintained by the User. For further information on these forms please contact the Infor Helpdesk.



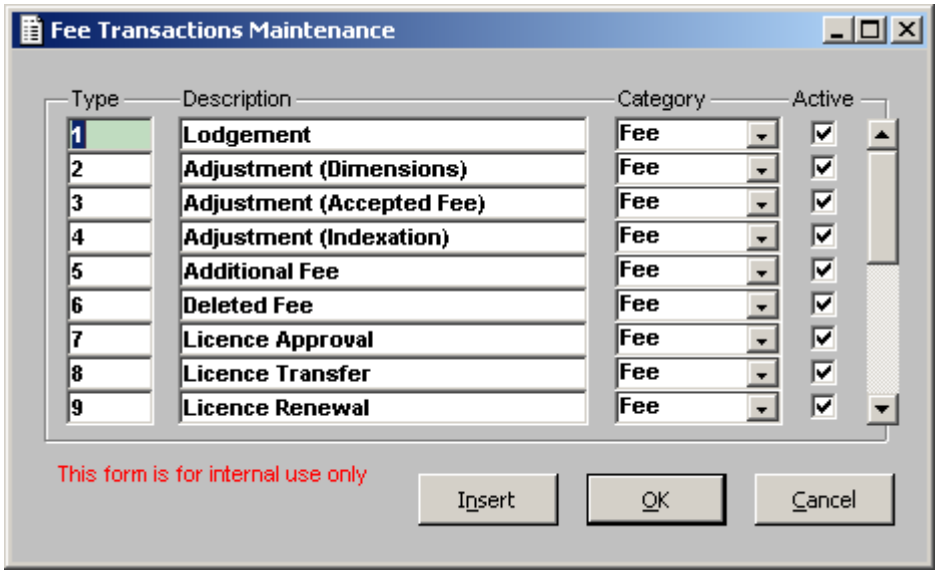
Fee Status Maintenance Form

Type

Description

Fee Transaction Maintenance Form

This form is related to parameters that are set within the System Parameters and are not maintained by the User. For further information on these forms please contact the Infor Helpdesk.



Fee Transaction Maintenance Form

Type

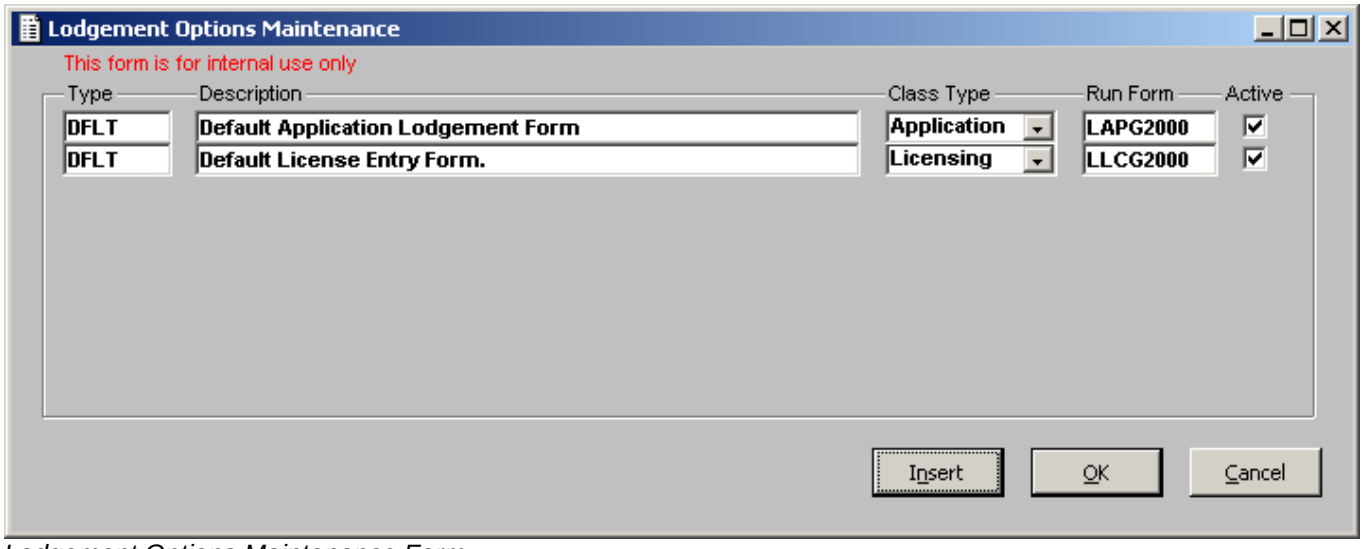
Description

Category

Active

Lodgement Options Maintenance Form

This form is related to parameters that are set within the System Parameters and are not maintained by the User. For further information on these forms please contact the Infor Helpdesk.



Lodgement Options Maintenance Form

Type

Description

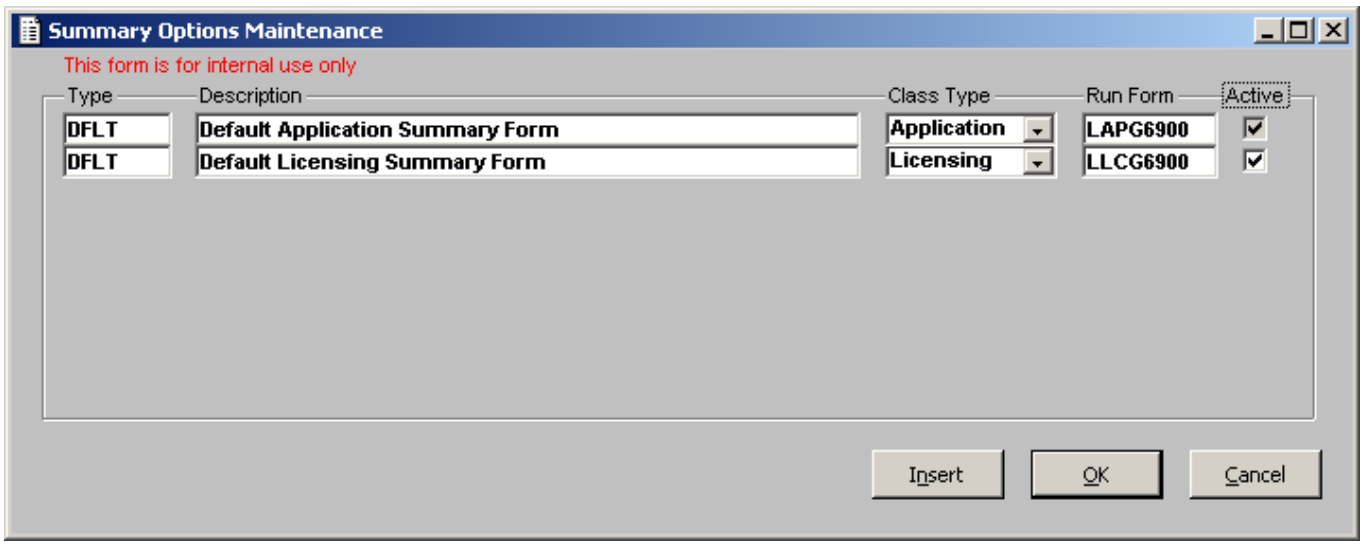
Class Type

Run Form

Active

Summary Options Maintenance Form

This form is related to parameters that are set within the System Parameters and are not maintained by the User. For further information on these forms please contact the Infor Helpdesk.



Summary Options Maintenance Form

Type

Description

Class Type

Run Form

Active

Maintenance

The following topics are covered in this section:

Applications Search Profile
Additional Application Filters
Application Selection
Maintenance Summary

This option allows for the following options for a specific application to be maintained following the Lodgement of an application, ie.

- Amendments
- Affected Properties
- Application Data
- Application Dimensions
- Application Fees
- Application Fees Refund
- Application Timesheets
- Bank Guarantee
- Building Classifications
- Cashier Warnings
- Change Application Type
- Conditions
- Consents
- Contribution Fees
- Contribution Fees Refunds
- Customer Requests
- Decisions
- Delete Application
- Dept of Infrastruction
- Development Categories
- Development Data
- Development Departures
- Extensions
- Infringements
- Inspections
- Joint Applications
- Letters
- Locations
- Miscellaneous Data
- Names
- Permits and Certificates
- Property Conditions
- References
- Registers
- Related Application
- Related Licenses
- Responses
- Subdivision Data
- Workflow
- Zones and Land Uses
- Building Data
- Development & Financial Contributions
- Email History

All maintenance options available are determined by responsibility.

Applications Search Profile

Applications Search Profile Form

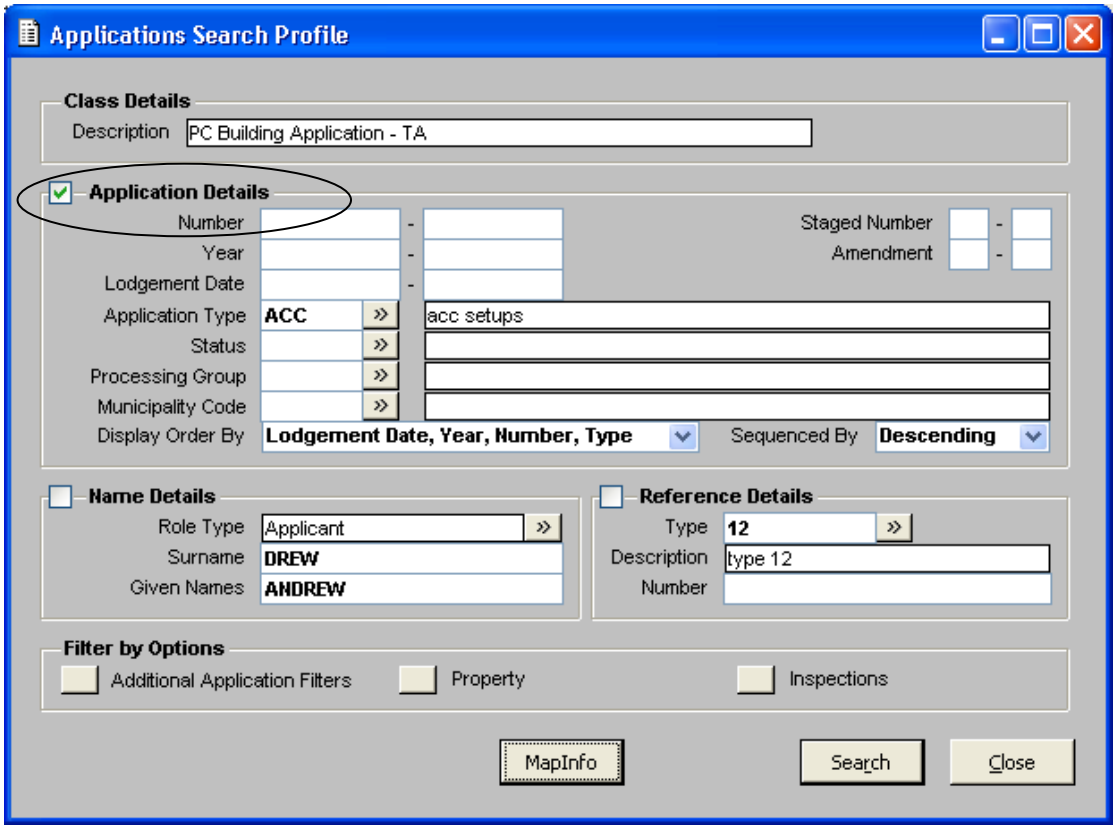
On entry to the Application Maintenance (or enquiry) function the first form that is displayed is the Class Selection form. Focus on the required Class and click on the Select Button and the Applications Search Profile form is displayed.

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 Application Search Profile Form is used to enter specific criteria to allow a previously lodged application to be displayed. If all Applications for the particular class are required, clicking on the Search button will then display all Applications. One or more of these may then be selected for modification or Enquiry.

The Application Search Profile is broken up into three distinct components. Each of these components has a check box in the top left-hand corner. The Name details and Reference Details may be used in conjunction with each Application details if the latter is checked on and either of names or references contain search criteria.

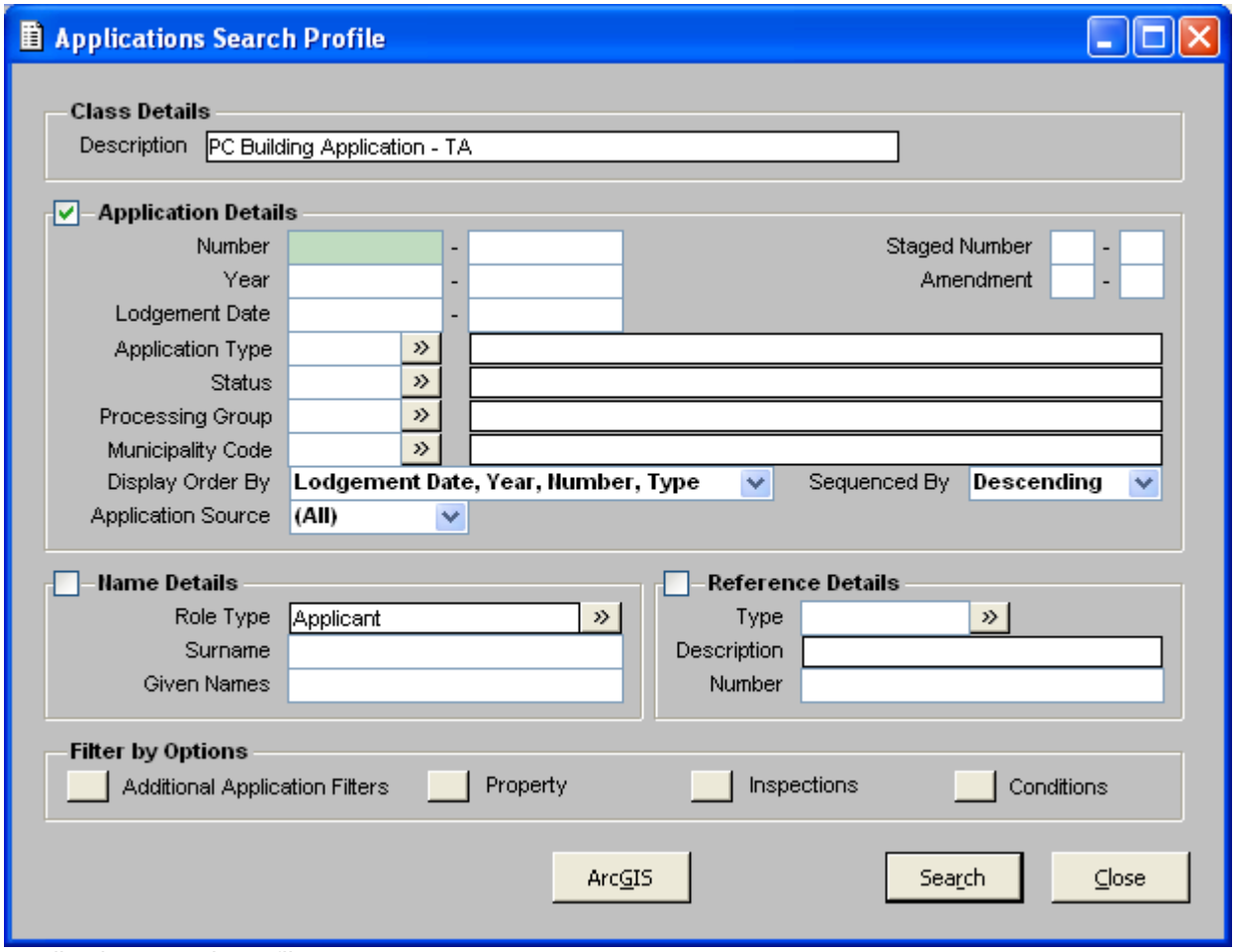
Combined Search
An example of a Combined Search using Application Type of 'ACC', Applicant of 'Andrew Drew' and a Reference Type of '12'.



Combined Search Criteria

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.

Application Details can be used in conjunction with the Filter by Options. The Additional Application Filters Option displays a Filter form where Consents, Categories, Decisions 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. Selecting the Conditions button will allow searching an Application by Condition Type or Group (as they exist for the application)



Application Search Profile Form

Class Details - Description

This field displays the Class Description and cannot be maintained.

Application Details

The Application Details Selection Box is automatically checked on by default, to allow an Application to be found via an Application Search. The Application Details section can be used in conjunction with the Property Filter. The Search criteria's are as follows:

Application Details - Number

As each Application 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 Applications 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 Applications 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 Application 6 and greater.

Application Details - Staged Number

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 Applications 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 Staged Applications 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 Staged Application 6 and greater.

Application Details - Year

Applications generally have a Year allocated as part of their number. Entering the Year in these fields will also help to narrow the length of the 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 Applications lodged within the entered Year and meeting any other search criteria.

However if a range of Applications 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 Applications within the Year range entered inclusive of the entered Years and meeting any other search criteria.

Application Details - Amendment

Entering an Amendment alpha character in the first field and tabbing to the next field will default the character entered in the first field into the second field. This will result in all Applications lodged with the Amendment character and meeting any other search criteria.

However if a range of Applications are required then the following example explains how this is done;

Entering an Amendment character in the first field and a different Amendment character in the second field will result in all Applications within the Amendment range entered inclusive of the entered characters and meeting any other search criteria.

Application Details - Lodgement Date

These fields display the Date an Application was lodged. Keying this Date if known will also make your search more exact.

Entering a Date in the first field and entering the same Date in the next field will result in all Applications lodged on the entered date and meeting any other search criteria.

However if a range of Applications are required then the following example explains how this is done;

Entering a Date in the first field and a different Date in the second field will result in all Applications within the Date range entered inclusive of the entered Dates and meeting any other search criteria.

Application Details - Application Type

Each Application has a predefined Type. A Type can be keyed into this field, or the Pop Up Button clicked to choose from the Application Type Pop Up form.

Application Details - Status

Each Application 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.

Application Details - Processing Group

Each Application can be assigned a Processing Group. The Processing Group may be keyed into the field if known, or use the Pop Up Button to choose from the Processing Group Pop Up form.

Application Details - Municipality Code

Each Application can be assigned a Municipality Code. The Municipality Code may be keyed into the field if known, or use the Pop Up Button to choose from the Municipality Code Pop Up form.

Application 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 “Application Details” and “Additional Application Filters”.

Application 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 “Application Details” and “Additional Application Filters”.

Application Details – Application Source

The Application Source can be used to filter out Applications that have been either created via ePathway or Pathway. The following options are available:-

- All (default)
- ePathway
- Pathway

Name Details

Click on the Name Details Selection Box to allow an Application 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 an Application is assigned a particular Role Type. This may be an Applicant, Builder, Architect etc. Keying a Role Type will select Applications 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 an Application 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 Application Filters

Selecting the Additional Application Filters button will display the Filter form to allow additional search criteria to be entered. This additional information could be for Consents, Categories, Decisions, Miscellaneous Data 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 Application Details on the Application Search Profile Form.

The Property Search Profile Form can also be used without entering any details on the Application Search Profile.

Enter a Street and/or Suburb and select Search. The Application Selection Form will display all Applications 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 - Inspections
Selecting this button will display the Inspections Search Profile form. The Inspections Search Profile Form will further filter the Application Details on the Application Search Profile Form.

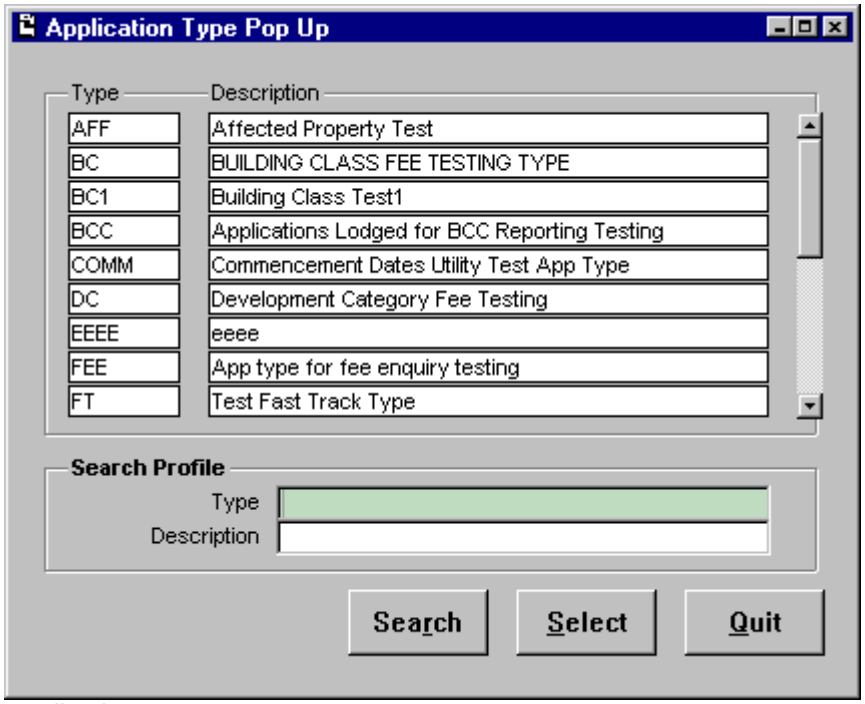
The Inspection Search Profile Form can also be used without entering any details on the Application Search Profile.

Filter by Options - Conditions
Selecting this button will display the Conditions Search Profile form. The Conditions Search Profile Form will further filter the Application Details on the Application Search Profile Form.

The Condition Search Profile Form can also be used without entering any details on the Application Search Profile.

Application Type Pop Up Form

The Application Type Pop Up Form allows the User to select from predefined Application Types associated with the Class selected. Once highlighted click the Select Button to have the Type entered in the Application Type field.



Application Type Pop Up Form

Type
The Application Type is a Coded Field particular to each Application Type Created.

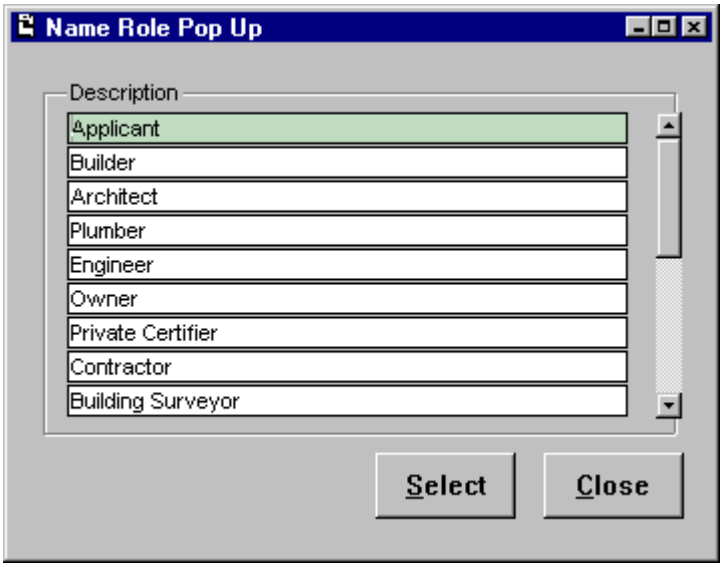
Description
The Application Type Description is more detailed enabling easier selection.

Search Profile - Type
Enter a Application 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.

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 Role Pop Up Form

Description
This field displays the Name Role Types that are available for selection.

Additional Application Filters

Additional Application Filters Form

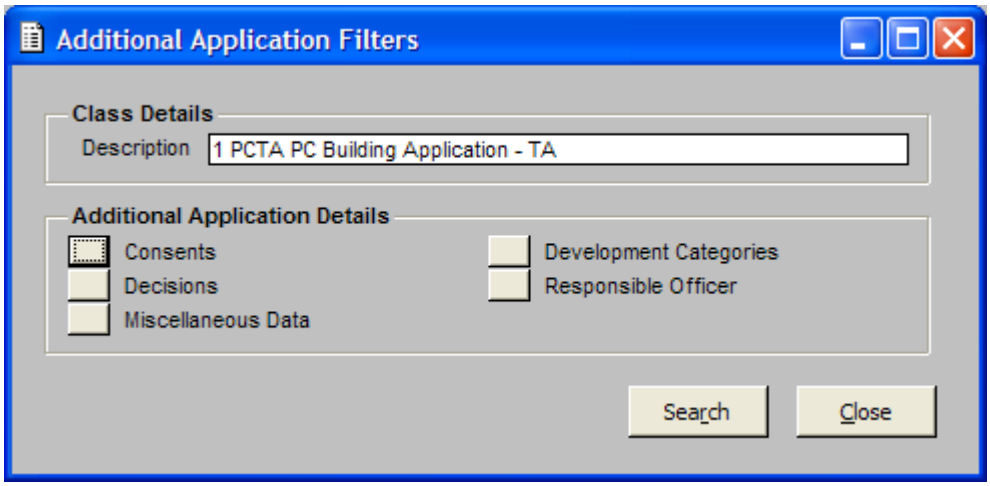
The Applications module has the ability to combine the Application Search Profile details with Consents, Decisions, Development Categories and Responsible Officer Search Profile Details.

Selecting the Search button on either the Additional Application Filters for, or any of the other Additional Filter Options, will initiate the process of finding all Applications that match the criteria used on ALL the Additional Filter Options AND the Application Search Profile form.

Selecting the OK button on one of the Additial Filter Options forms, saves the Search Criteria entered for that form and returns to the Additional Application 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 Application Filters Form

Class Details - Description

This field displays the Class Description and cannot be maintained.

Additional Application 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 Applications 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 Application Search Profile.

Additional Application Details – Development Categories

Selecting the Development Categories Button will display the Development Categories Filter. On the Development Categories Filter form the User is able to enter in additional search criteria related to Development Categories.

Selecting the OK button on the Development 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 Applications 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 Application Search Profile.

Additional Application 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 Applications 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 Application Search Profile.

Additional Application 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 Applications 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 Application Search Profile.

Additional Application Details – Miscellaneous Data

Selecting the Miscellaneous Data Button Filter form will display the Miscellaneous Data Filter. On the Miscellaneous Data Filter form the User is able to enter the required Miscellaneous Data Type or use the Pop Up to select the Miscellaneous Data.

Selecting the OK button on the Miscellaneous Data 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 Applications 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 Application Search Profile.

Miscellaneous Data Type

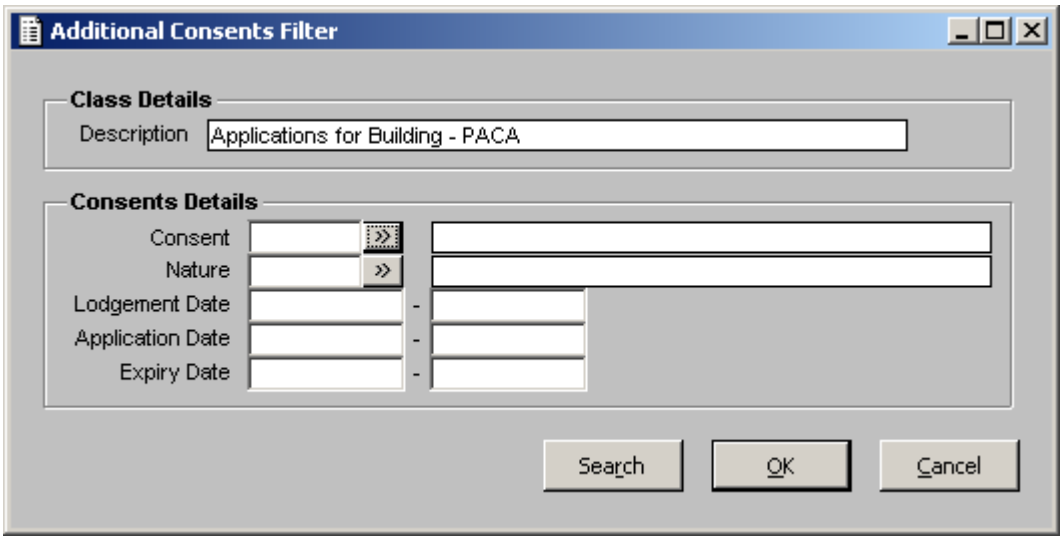
If a particular Miscellaneous Data type is required, then the Type may be keyed in here or the Pop Up button may be used to display the list of Types to choose from.

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 Applications that match the criteria used on ALL the Additional Filter Options AND the Application Search Profile form.

Selecting the OK button on this form saves the Search Criteria entered on this form and returns to the Additional Application 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.

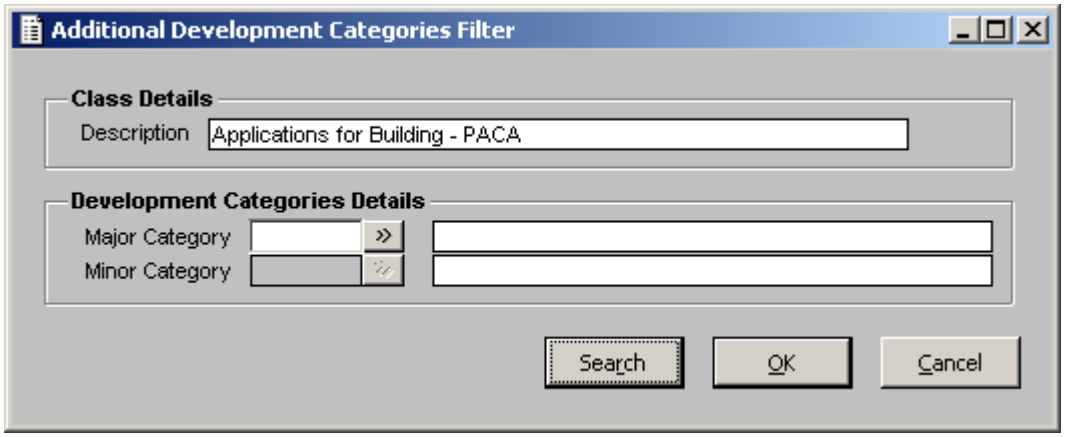
Additional Development Categories Filter Form

The Additional Development Categories Filter form allows additional search criteria to be nominated using a Development Category. The User has the ability to nominate the Major and or Minor Development 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 Applications that match the criteria used on ALL the Additional Filter Options AND the Application Search Profile form.

Selecting the OK button on this form saves the Search Criteria entered on this form and returns to the Additional Application Filters form to allow the User to select another Additional Filter Option.



Additional Development Categories Filter Form

Class Details - Description

This field displays the Class Description and cannot be maintained.

Development 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.

Development 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.

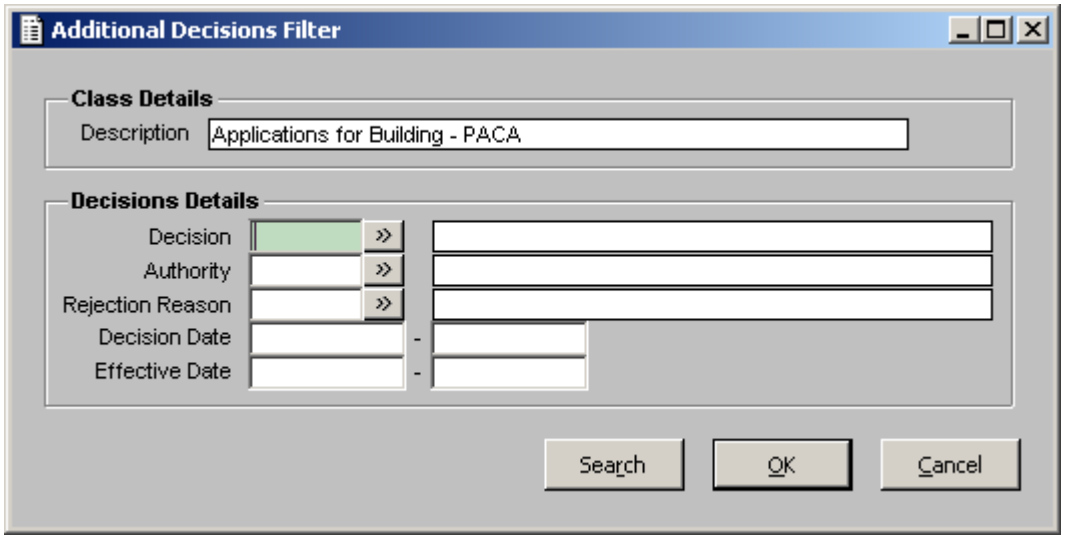
Note that entry of a Minor Category is not required for the search to be conducted.

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 Applications that match the criteria used on ALL the Additional Filter Options AND the Application Search Profile form.

Selecting the OK button on this form saves the Search Criteria entered on this form and returns to the Additional Application 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.

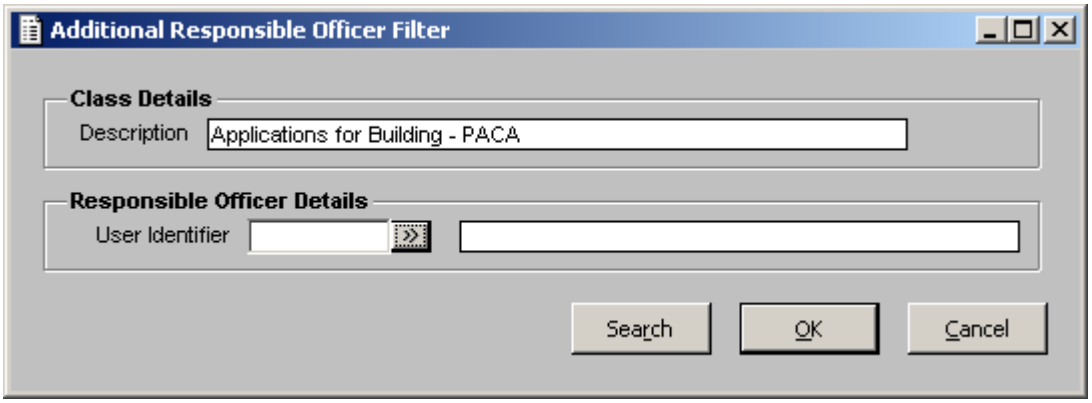
Additional Responsible Officer Filter Form

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 Applications that have this Responsbile Officer as a Responsible Officer for the actual Application.

Selecting the Search button on this form will initiate the process of finding all Applications that match the criteria used on ALL the Additional Filter Options AND the Application Search Profile form.

Selecting the OK button on this form saves the Search Criteria entered on this form and returns to the Additional Application 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

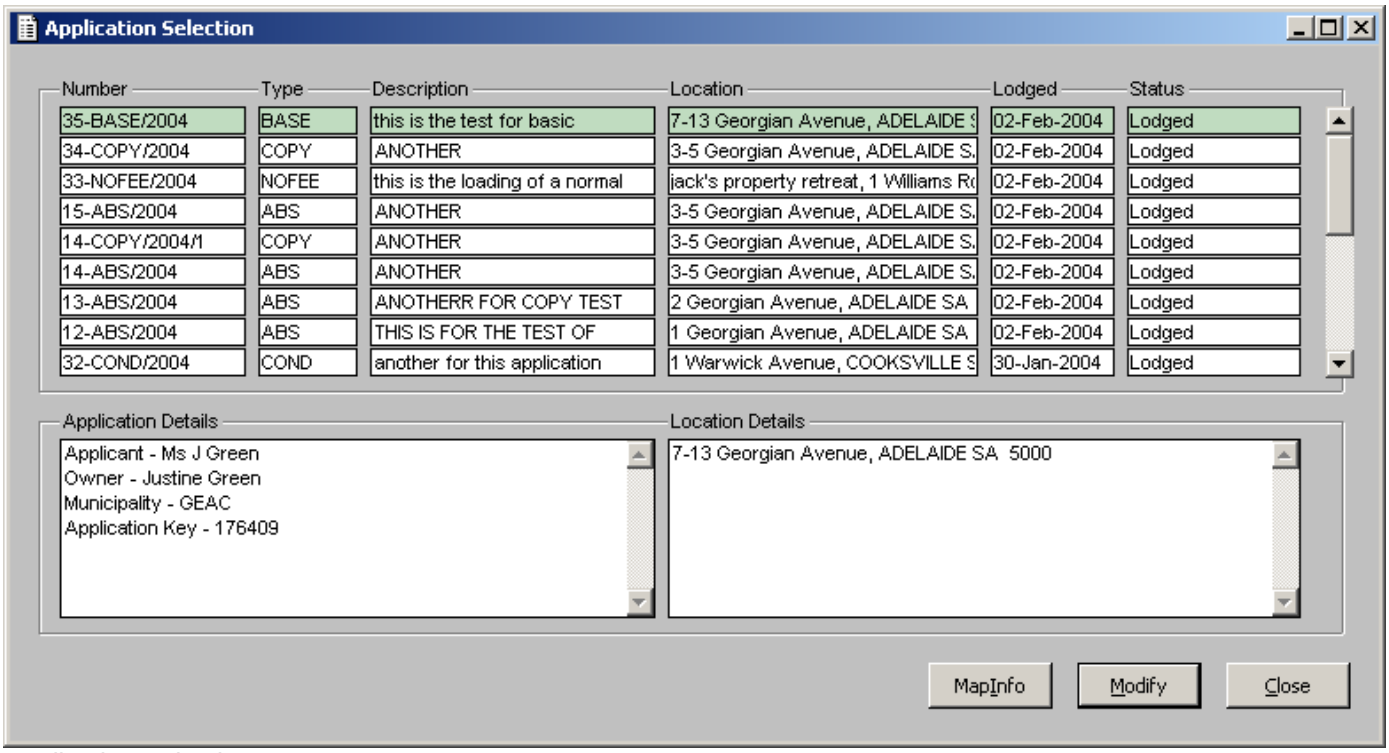
Enter in the required Responsible Officer Identifier that is to be included in the search. If the Responsible Officer Identifier Code is not known then the Pop Up button can be used to display a list of the Responsible Officers.

This Responsible Officer will be used to find Applications that have the Officer nominated within the Responsible Officers listed on the Summary Form for the Application.

Application Selection

Application Selection Form

The Application Selection form gives details of the Applications that have met the particular Criteria selected in the Search Profile. The Applications may then be selected and modified.



Application Selection Form

Number
This field shows the actual number allocated to each Application.

Type
This field shows the Code give to each Application Type.

Description
The Description field details the information entered against each Application

Location
This field details the actual Location that the Application has been lodged against.

Lodged
This field details the date that the Application has been lodged on.

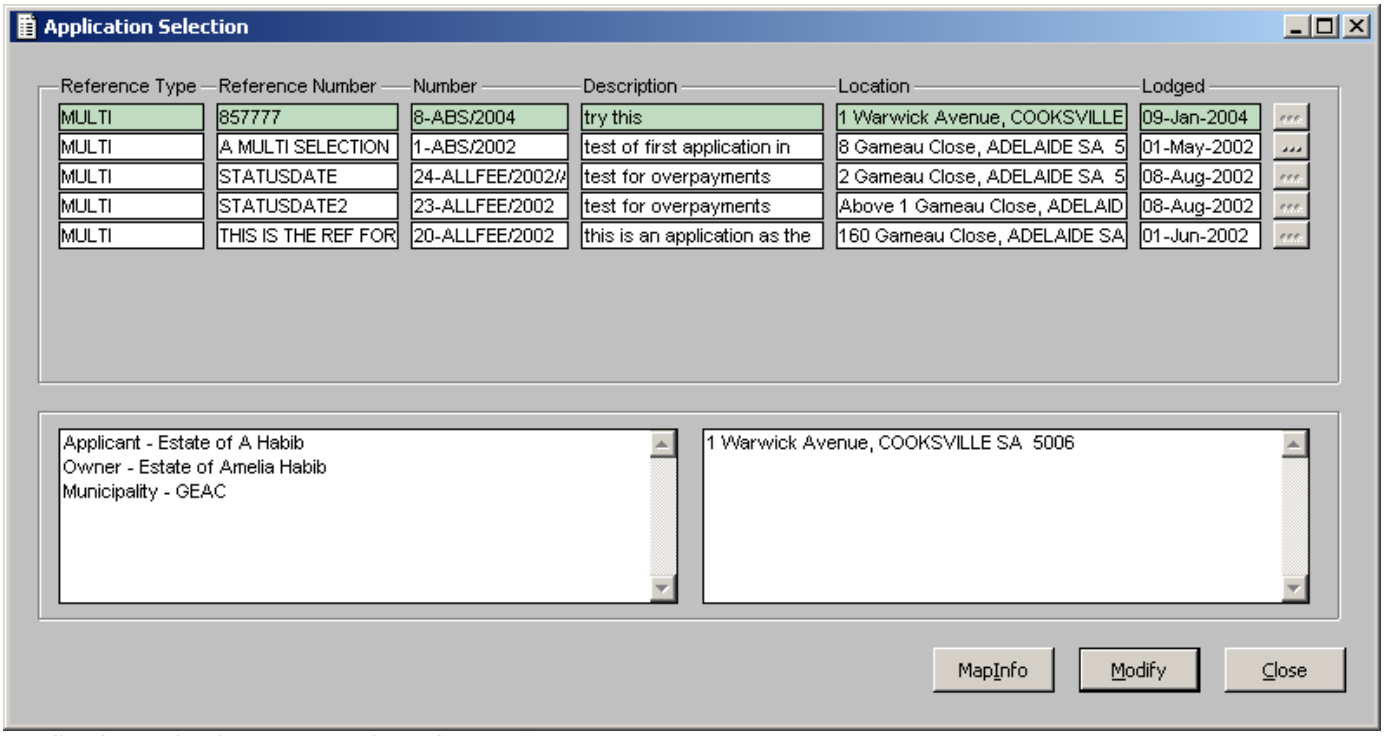
Status
This field displays the actual Status of each Application. For Example, it may be “Lodged”, Under Assessment, “Completed” etc.

Application Details
This box will display Application information on the highlighted Application from above. The last line of this information displays the internal TPK number on the entity LAPAPPL for this Application referenced as ‘Application Key’.

Location Details
This box will display Application Location information on the highlighted Application from above.

Application Selection Form - Selected By Reference

The Application Selection form gives details of the Applications that have met the particular Criteria selected in the Search Profile. The Applications may then be selected and modified.



Application Selection Form -Selected By Reference

Reference Type
This field shows the actual Reference Type allocated to each Application.

Reference Number
This field shows the Number given to each Reference.

Number
The Number field details the actual number of each Application

Description
This field details the actual Description of the Application.

Location
This field details the Location that the Application has been lodged on.

Lodged
This field displays the actual Date the Application was Lodged.

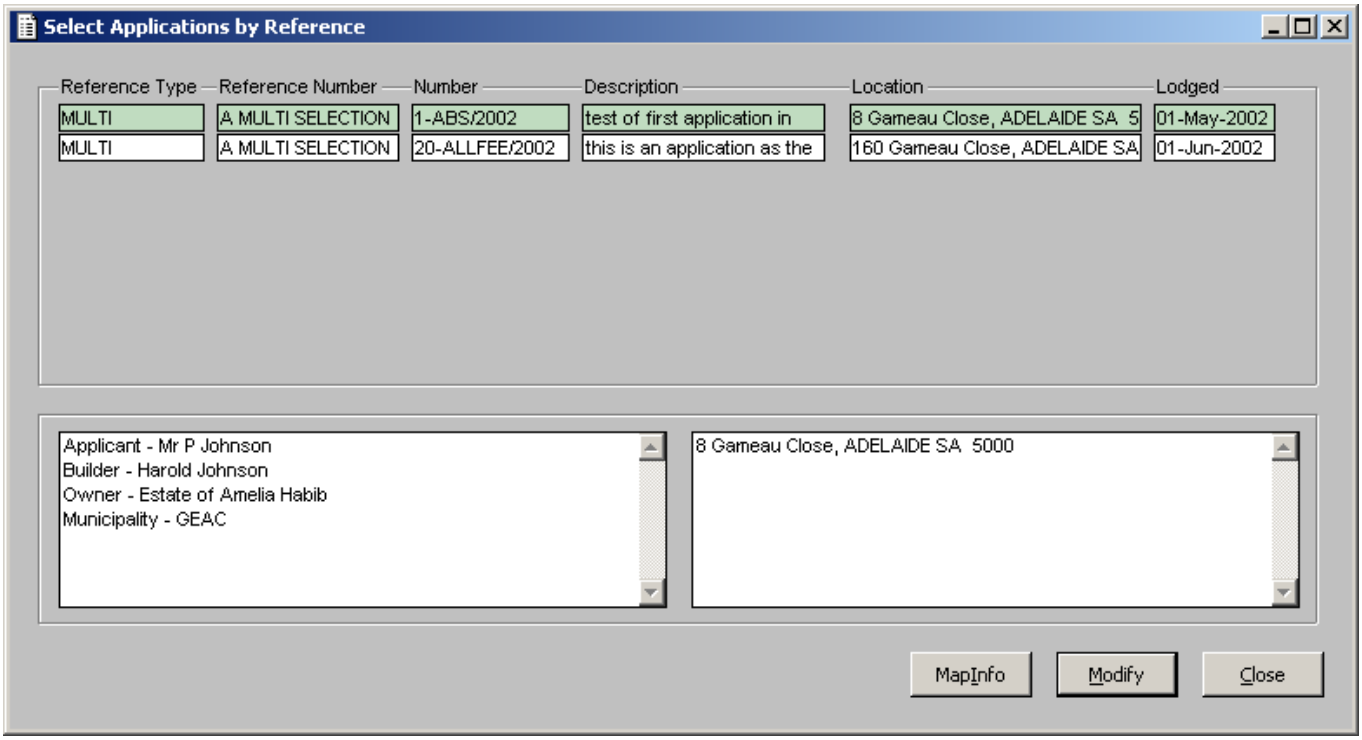
Detail Button
The Detail Button allows the User to detail out onto the Reference being displayed. This is only available when the Reference has been linked to many and is not a single entry. The Select Applications by Reference form will be displayed allowing selection of the applicable Application.

Application Details
This box will display Application information on the highlighted Application from above.

Location Details
This box will display Application Location information on the highlighted Application from above.

Application Selection Form - Select Applications By Reference

The Application Selection by Reference form gives details of the Applications that have been assigned to the same Reference Type and Number. The Applications may then be selected and modified.



Select Applications by Reference Form

Reference Type
This field shows the actual Reference Type allocated to each Application.

Reference Number
This field shows the Number given to each Reference.

Number
The Number field details the actual number of each Application

Description
This field details the actual Description of the Application.

Location
This field details the Location that the Application has been lodged on.

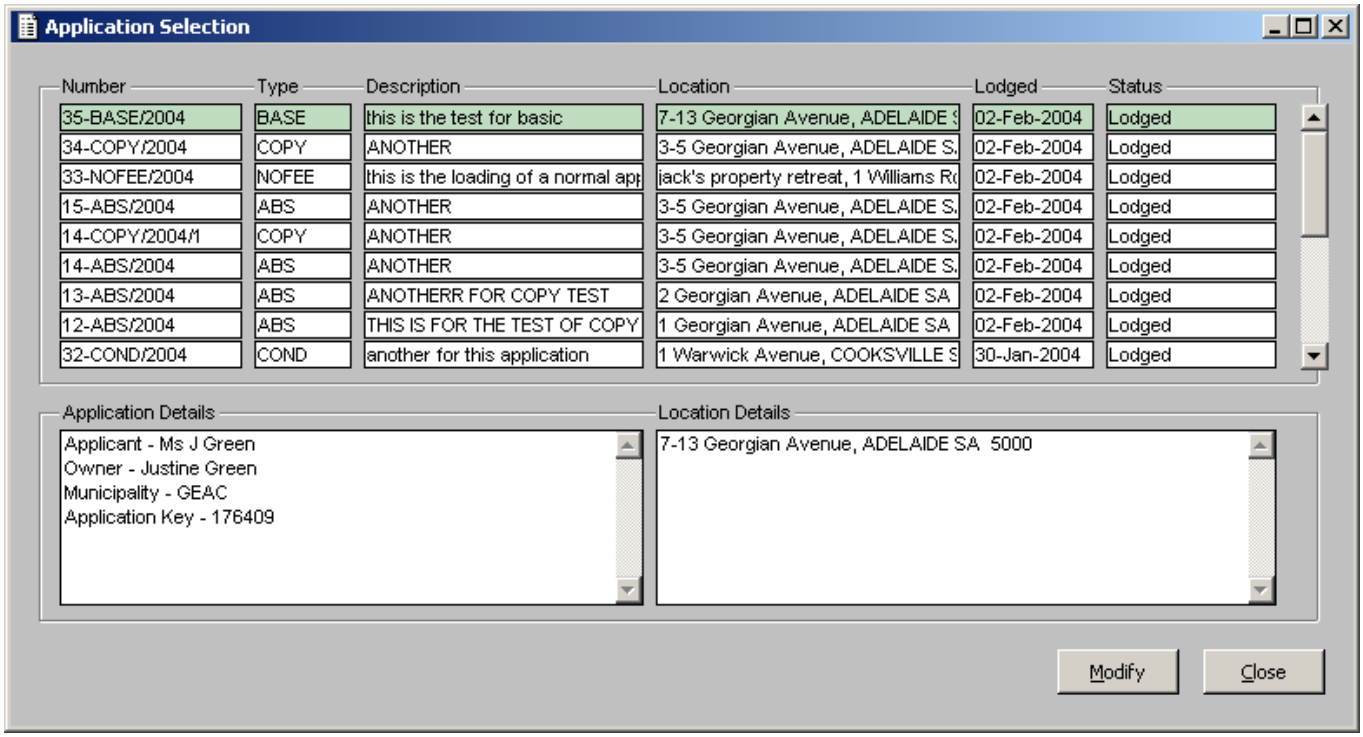
Lodged
This field displays the actual Date the Application was Lodged.

Application Details
This box will display Application information on the highlighted Application from above.

Location Details
This box will display Application Location information on the highlighted Application from above.

Application Selection Form - Selected By Additional Filters

The Application Selection form gives details of the Applications that have met the particular Criteria selected in the Search Profile using the Additional Filters. The Applications may then be selected and modified.



Application Selection by Additional Filters Form

Number
The Number field details the actual number of each Application

Type
This field details the actual Type of Application.

Description
This field details the actual Description of the Application.

Location Details
This box will display Application Location information on the highlighted Application from above.

Lodged
This field displays the actual Date the Application was lodged.

Status
This field displays the actual Status of each Application. For Example, it may be “Lodged”, Under Assessment, “Completed” etc.

Application Details
This box will display Application information on the highlighted Application from above.

Location Details
This box will display Application Location information on the highlighted Application from above.

Maintenance Summary

Summary Form

The Application Summary Form displays relevant information pertaining to the Application that has been selected. This form enables the Application to be modified via an Options Menu or by 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 detailing out further to each of the options available. The options are detailed below.

On the Summary Form both Application Fees fields and Contribution Fees fields are displayed. Where an Application does not have Contribution Fees this section of the Summary Form will be blank with no fields displayed.

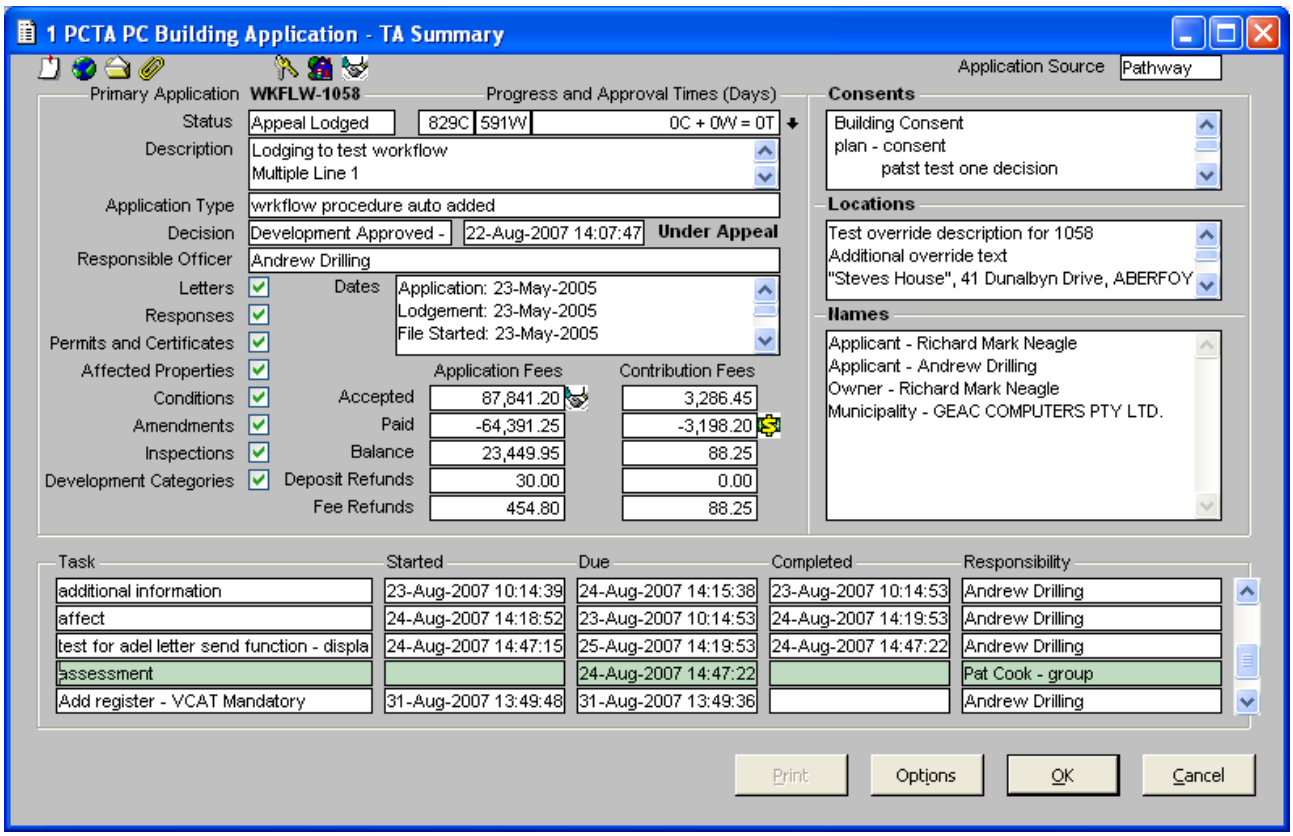
The Summary Form also provides a Workflow Menu at the top of the screen. The Workflow displays the following options;

- Workflow -
- Task Detail
- Continue Task
- Complete Task
- Repeat Task
- Delete 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. Additionally if Bank Guarantees have been assigned to either Application Fees or Contribution Fees, a Glyph will be displayed allowing the User to select it and display all the Bank Guarantees associated to the Application in some way including those Guarantees that are defined as Application or Contribution without Fees.



Summary Form

Application
The Application field displays the Application Number and a Detailed Description on what the Application is actually for.

Status
This field displays the current Status of this Application. As detailed previously this may be “Completed”, “Under Assessment” etc

Application Progress Times (Days)
The Progress Times (Days) displays the time taken between the Lodgement and the Final Decision Date of the Application.

The first field displays the days as Calendar Days. The second field displays days as Working Days.

If the Application has no Tasks on it, the Approval Tune is calculated for the Approval Date Range. Both Calendar and Working days are calculated.

NOTE: - where the authorised function ‘Use Application Date for Calculations’ has been flagged on then the values shown in this field are using the Application Date and not the Lodgement Date to determine Progress Times.

Application Tasks Approval Times (Days)
The Approval Times (Days) displays the time taken for the approval of the Application.

This field displays the Total number of days

Tasks can be defined as either Working Days or Calendar Days. When calculating the Approval Times, the calendar format of each Task is used for the calculations on that Task.

Only Tasks matching the following criteria will be used in the calculations:
- Flagged as ‘Include in Approval Times’.
- Has an Actual Start Date, ie the Task has been started.
- Started before the ‘Final Decision Date’.
- If completed (Actual Completion Date), then completed after the Lodgement Date

- Dates outside of the Approval Date Range:
- Tasks Starting before the Approval Date Range will use the Lodgement Date.
- Incomplete Task will use the 'Final Decision Date'
- Tasks completed after the Approval Date Range will use the 'Final Decision Date'.

These days will stop calculating once a decision has been added to the Application.
All Tasks on an Application, matching the required criteria, can be grouped under the following three scenarios:

NOTE: - where the authorised function 'Use Application Date for Calculations' has been flagged on then the values shown in this field are using the Application Date and not the Lodgement Date to determine Approval Times.

Note that if a Task is Suspended then the suspended time is also displayed in brackets. Therefore the Total Times shown are inclusive of the Suspended time shown in the brackets.

Note that if the relevant parameter has been checked on in Workflow parameters, an arrow will display next to this field. When the cursor is positioned on the arrow, a message will indicate that 'First day has been excluded from Progress and Approval times'.

Scenario 1: No overlap.
- Task 2 started after Task 1 started.
- Task 2 started after Task 1 completed.

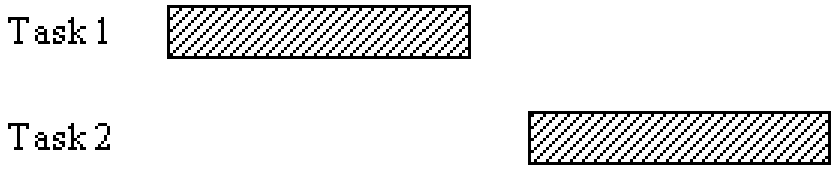


Diagram 1. Scenario 1: No overlap.

Calculation:
- Task 1, between its start and completed dates.
- Task 2, between its start and completed dates.

Scenario 2: Partially overlapped.
- Task 2 started after Task 1 started.
- Task 2 started before Task 1 completed.
- Task 2 completed after Task 1 completed.

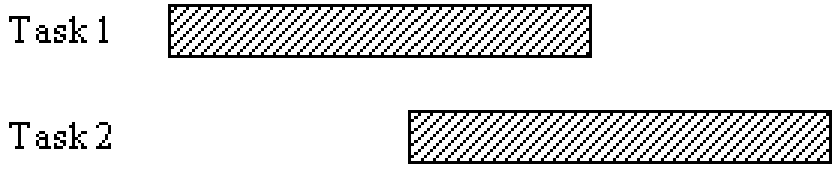


Diagram 2. Scenario 2: Partially overlapped.

Calculation:
- Task 1, between its start and completed dates.
- Task 2, between Task 1's completed date and Task 2's completed date.

Scenario 3: Completely overlapped
- Task 2 started after Task 1 started.
- Task 2 started before Task 1 completed.
- Task 2 completed before Task 1 completed.

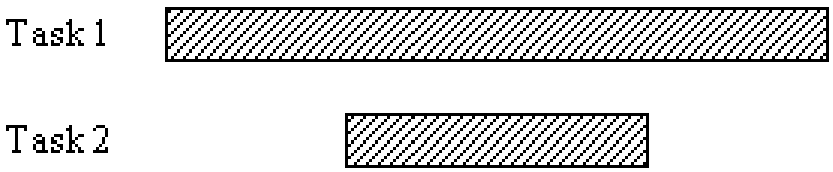


Diagram 3. Scenario 3: Completely overlapped.

Calculation:

- Task 1, between its start and completed dates.
- Task 2 is not used.

Worked Example

The following is a worked example demonstrating the principles and rules used to calculate the Approval Time of an Application.

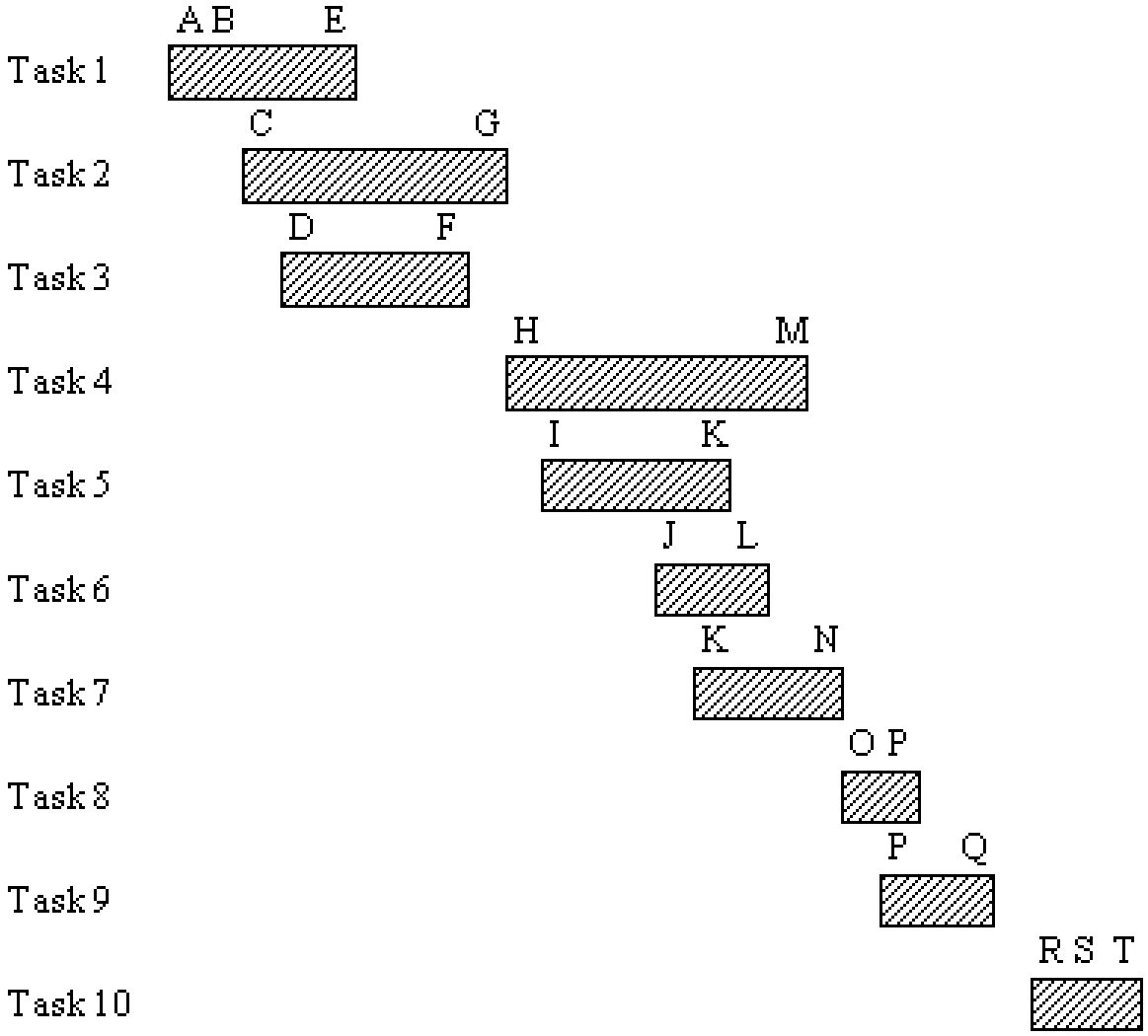


Diagram 4: Tasks on an Application.

The Letters in the diagram, represent the start and completion dates of each Task, except for the letters 'B' and 'S'. 'B' is the Lodgement Date and 'S' is the Final Decision Date. The actual dates represented by each letter can be found in table 1.

A	08-Jan-2001	F	15-Jan-2001	K	23-Jan-2001	P	30-Jan-2001
B	09-Jan-2001	G	16-Jan-2001	L	24-Jan-2001	Q	01-Feb-2001
C	10-Jan-2001	H	18-Jan-2001	M	25-Jan-2001	R	05-Feb-2001
D	11-Jan-2001	I	19-Jan-2001	N	26-Jan-2001	S	06-Feb-2001
E	12-Jan-2001	J	22-Jan-2001	O	29-Jan-2001	T	07-Feb-2001

Table 1. Actual Dates represented by letters in Diagram 4.

For example, Task 4 started at 'H', the 18-Jan-2001 and was completed at 'M', the 25-Jan-2001.

Task #	Start Date Used	Completion Date Used	Calendar Days	Working Days
Task 1	09-Jan-2001	12-Jan-2001	4	4
Task 2	12-Jan-2001	16-Jan-2001	5	3
Task 3	-	-	-	-
Task 4	18-Jan-2001	25-Jan-2001	8	6
Task 5	-	-	-	-
Task 6	-	-	-	-
Task 7	25-Jan-2001	26-Jan-2001	2	1
Task 8	29-Jan-2001	30-Jan-2001	2	2
Task 9	30-Jan-2001	01-Feb-2001	3	3
Task 10	05-Feb-2001	06-Feb-2001	2	2

Table 2: Approval Times for the Worked Example.

From the Worked Example, if all the Tasks were defined as Calendar Days, then the Approval Time would be 4 + 5 + 8 + 2 + 2 + 3 + 2 = 26 days. If all the Tasks were defined as Working Days, then the Approval Time would be 4 + 3 + 6 + 1 + 2 + 3 + 2 = 21 days (Note, the 26th of January is Australia Day and is a public holiday).

If the Tasks are set up such that they use a combination of both Calendar Days and Working Days, then just add up the number in the appropriate column for each Task to find the total for the Application.

Description
The Description field details the type of Application it is. For example this may be “Four Bedroom Brick House”, “Multi-Storey Car Park” etc.

Application Type
This field displays the actual Application Type that has been assigned to the Application.

Decision
This field shows the details of the Decision that has been given to this Application. For example it may be “Approved”, “Rejected”, “Interim Approval” etc. If the Decision has been flagged as ‘Under Appeal’ then the words ‘Under Appeal’ are displayed in bold print next to this field.

If the Decision has been flagged as ‘Final’ in the Decision parameters, then the word ‘Final’ will display in bold print next to this field. This will occur when the latest Final decision has been added (it may not mean the latest decision is used as there may be more recent decision types added that have not been flagged as ‘final’.)

If a decision is Final AND Under Appeal, ‘Under Appeal’ will display next to the field in bold print.

Responsible Officer
This field details the Responsible Officer (s) assigned to this Application. The Primary Responsible Officer is displayed first followed by any other Responsible Officers that are also assigned to the Application.

Application Dates
This edit box displays all the dates for the Application. If there are multiple dates, then a scroll bar will be available to move up and down to see all the dates.
The dates that are available for display are:

- Application
- Lodgement
- File Started
- File Finished
- To Be Commenced By
- Work Commenced
- To Be Completed By
- Work Completed
- Endorsement
- Expiry
- Amended Application date
- ABS/BCC Extract Date
- DPIWE Extract Date
- Valuations Extract Date

To maintain the dates the User must double click to access the Application Data Form.

Letters
If this has been checked it indicates that this particular Application has had Letters entered against it. Double clicking on this field will detail out to the Letters Selection Form.

Responses
If this has been checked it indicates that this particular Application has had Responses entered against it. Double clicking on this field will detail out to the Responses Selection Form.

Permits and Certificates
If this has been checked it indicates that this particular Application has had Permits and Certificates entered against it. Double clicking on this field will detail out to the Permits and Certificates Selection Form.

Affected Properties
If this has been checked it indicates that the particular Application has had Affected Properties entered against it. Double clicking on this field will detail out to the Affected Properties Maintenance Form.

Conditions
If this has been checked it indicates that this particular Application has had Conditions entered against it. Double clicking on this field will detail out to the Conditions Selection Form.

If a Book symbol displays against the Conditions option then the User is not able to add, change or maintain the Conditions as they have been frozen by the entry of a Permit / Certificate that has set the Conditions to frozen. If the User has access to Unfreeze the Conditions then maintenance will be allowed.

Amendments
If this has been checked it indicates that this particular Application has had Amendments entered against it. Double clicking on this field will detail out to the Amendments Selection Form.

Inspections
If this has been checked it indicates that this particular Application has had Inspections entered against it. Double clicking on this field will detail out to the Inspections Selection Form.

Development Categories
If this has been checked it indicates that this particular Application has had Development Categories entered against it. Double clicking on this field will detail out to Major Development Categories Maintenance Form.

Application Fees - Accepted
This field displays the accepted value of any fees against the Application.

Note that if a Bank Guarantee has been assigned to the Application Fees then a Glyph will be displayed to the right of this field. Selecting this Glyph will display any Bank Guarantees whether they be for the Application or for the Application Fees.

Application Fees - Paid
This field will display the dollar value of any payments made against the Application.

Application Fees - Balance
This field displays the balance of money owed after any payments have been made against the Application.

Where the Account Method for the Application 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. However they will be reflected in the Accepted field.

Application Fees – Deposit Refunds
This field will display the dollar value of any money that has been 'Refunded' on a Deposit Fee against this particular Application.

Application Fees – Fee Refunds
This field will display the dollar value of any money that has been 'Refunded' on an Application Fee against this particular Application.

Contribution Fees - Accepted
This field displays the accepted value of any fees against the Application.

Note that if a Bank Guarantee has been assigned to the Contribution Fees then a Glyph will be displayed to the right of this field. Selecting this Glyph will display any Bank Guarantees whether they be for a Contribution or for the Contribution Fees.

Contribution Fees - Paid
This field will display the dollar value of any payments made against the Application.

Contribution Fees - Balance
This field displays the balance of money owed after any payments have been made against the Application.

Contribution Fees – Deposit Refunds
This field will display the dollar value of any money that has been 'Refunded' on a Contribution Deposit Fee against this particular Application.

Contribution Fees – Fee Refunds
This field will display the dollar value of any money that has been 'Refunded' on a Contribution Fee against this particular Application.

Consents

If this particular Application has had Consents entered against it they are displayed in this field. Double clicking on this field will detail out to the Consent Selection Form. Any Decisions that have been added to the Consents will display the description of that Decision under the Consent it applies to.

Locations
The Locations box details all Locations associated with this particular Application. Double clicking on this box will detail out to the Locations Maintenance Form.

Names
The Names box details all Names and Name Role descriptions that are associated with this particular Application. 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 Application at Lodgement. Tasks 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.

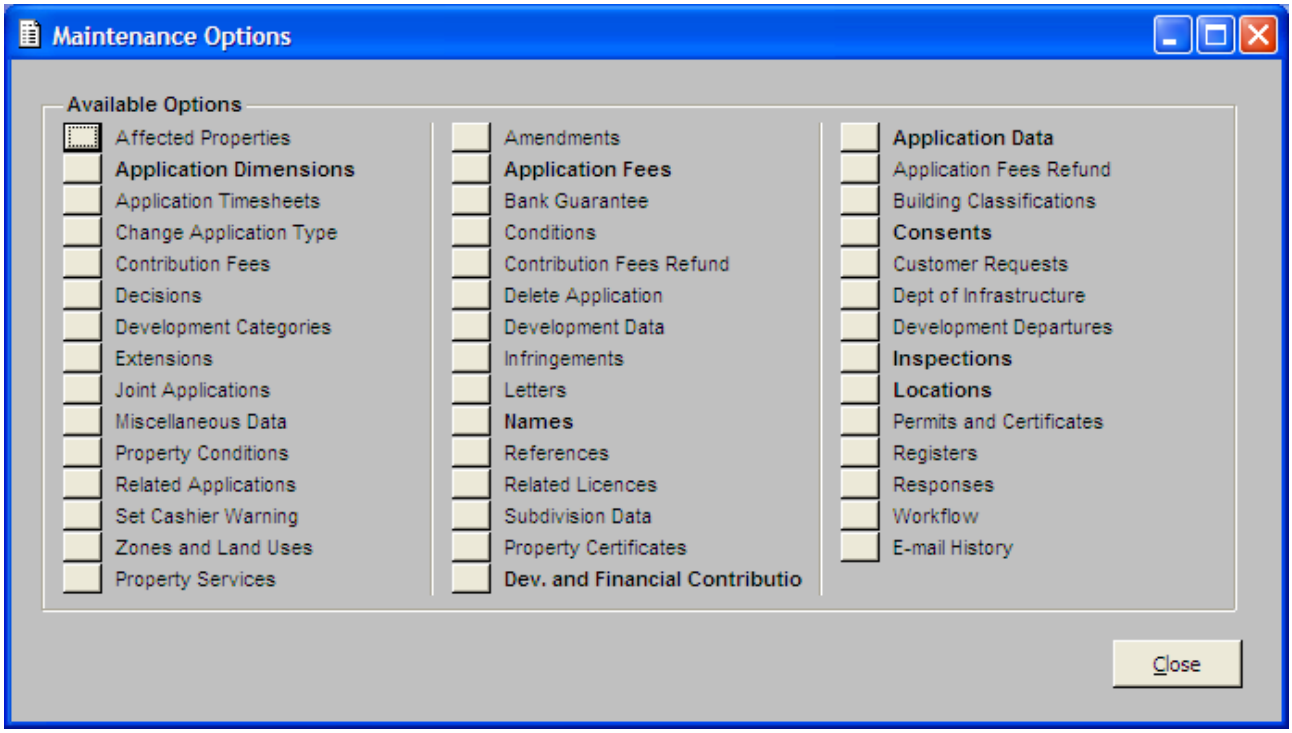
Responsibility
This field will display the Responsible Group or Officer who is Responsible for the particular Task assigned to this Application.

Video Buttons

The video buttons enable the User to move from one application to another in a multiselected range. When more than 1 application is selected then a count is displayed alongside the video buttons.

Cashier Warning
This label shows if there has been a Cashier Warning set against this application – the description of the Cashier Warning should be made relevant for the Users.

Maintenance Options Form



Maintenance Options Form

Available Options

Selection of the Options button will display the relevant Maintenance forms.

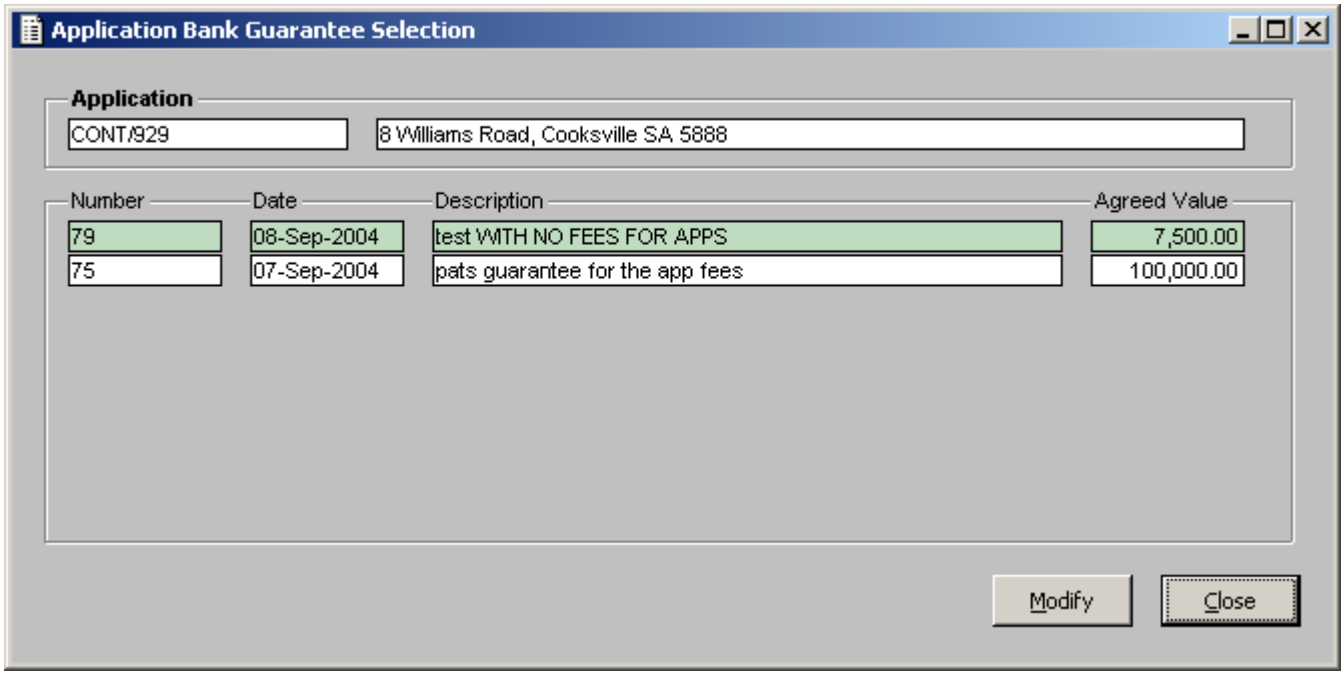
Application Bank Guarantee Selection Form

When the Bank Guarantee Glyph is selected from the Summary Form the Selection form will be displayed if more than one Bank Guarantee has been assigned to the Application. From this from the User is then able to select the Bank Guarantee required.

If the Glyph has been selected from the top of the Summary form then ALL Bank Guarantees will be displayed on the selection form.

If the Glyph is selected from next to the Application Fees Accept field then only Bank Guarantees that have been defined as for Application Fees or Applications will be displayed on the selection form.

If the Glyph is selected from next to the Contribution Fees Accept field then only Bank Guarantees that have been defined as for Contribution Fees or Contributions will be displayed on the selection form.



Application Bank Guarantee Selection Form

Application

The Application currently being maintained is displayed in this field along with the location of the Application.

Bank Guarantee Information

Details of the Bank Guarantee are displayed on the line. This includes the Number, Date and Agreed value for the Bank Guarantee. The User can focus on the required Bank Guarantee and select the Modify button to maintain the Bank Guarantee information.

Maintenance Options

The following topics are covered in this section:

Application Data
Building Classifications
Development Data
Subdivision Data
Extensions Maintenance
Department of Infrastructure Details Maintenance
Locations
Affected Properties
Names
Consents
Decisions
Application/Contribution
Deposits Retained
Refunds
Permits and Certificates
Letters
Responses
Development Categoroes
Zones & Land Uses
Amendments
Development Departures
Related Applications
Joint Applications
Change Application Type
Delete Application
Application Dimensions
Building Class
Miscellaneous Data
Inspections
Conditions
Customer Requests
Infringements
References
Registers
Set Cashier Warning
WorkFlow
Development & Contribution Types

Application Data

Applications Data Maintenance

This option holds the following general information about the application:

Application Number
Application Address
Description of Work
Date Details:

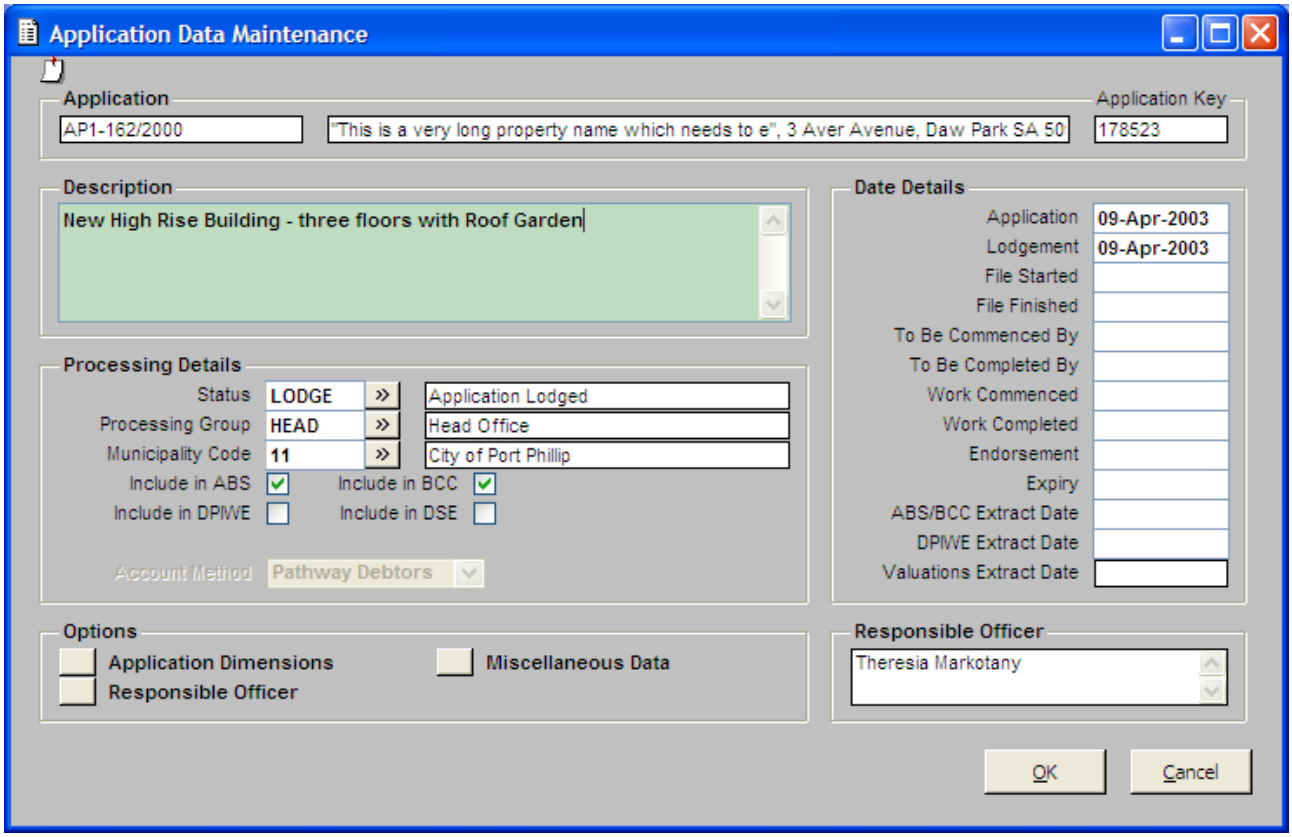
Application Date	Lodgement Date
File Started Date	File Finished Date
Work Commenced Date	Work Completed Date
Endorsement Date	Expiry Date

Processing Details:
- Status
- Processing Group
- Responsibility Group

The following Options are available from this form:
Dimension
Print Cover Sheet
Miscellaneous Data

Application Data Maintenance Form

The Application Data Maintenance Form allows the entry of information regarding the actual Application. Date Details show when the Application is due to commence, when it should be completed, whether it is to be included in the ABS or BCC extracts and if so the Date that it was extracted.



Application Data Maintenance Form

Application

The Application Fields are made up of two sections. The First being the actual Application Number selected and the second being the location of the Application

Application Key

The Application Key is displayed in this field. This is the internal TPK number on the entity LAPAPPL for this Application. This field is also the Payment Reference for Invoice produced via Applications for Debtors.

Description

The Description Field is a multi-line field detailing information about the Application. This may be what Type of Application it is, or description that may help in the Processing of this Application.

Date Details - Application

This Field details the Actual Date that the Application was received.

NOTE: - If the Authorised Function 'Use Application Date for Calculations' has been activated for this Application Class and the field flagged ON in the System Parameter, then the following will occur when the Application Date is changed..

When the Application Date is modified on the Application Data Maintenance form. The user will be prompted with the following message –
"Do you wish to adjust the Start Date of the first Started Task linked to this Application?"

Selecting "Yes" will force the system to check if the first Task linked to the Application has been started and if its Start Date is the same as the Application's Lodgement Date. If this is the case then the Start Date and Estimated Start Date of that first Task will be modified to the Application Date. This will then force the re-calculation of the Estimated Completion Date Time (Due Date) and the Estimated Start / Finish Times of any Tasks linked to that first one. If the first Task has been started and completed, only the Start Times will be modified, Completion Times will not be adjusted.

NOTE: - This function is an authorised function and therefore will not display if the authorisation is not active.

Date Details - Lodgement

This Field details the Date that the Application was Lodged onto the Computer.

Date Details - File Started
This Field details the Date that the Physical File was started for the Application.

Date Details - File Finished
This Field details the Date that the Physical File was finished for the Application.

Date Details – To Be Commenced By
This Field details the Date that the Work is to be Commenced By for the Application. This field can be automatically calculated if the details within the Application Type Parameters have been defined for the calculation to occur.

Date Details – To Be Completed By
This Field details the Date that the Work is to be Completed By for the Application. This field can be automatically calculated if the details within the Application Type Parameters have been defined for the calculation to occur.

Date Details - Work Commenced
This Field details the date that Work Commenced at the Location of the Application.

Date Details - Work Completed
This Field details the date that Work at the Location was Completed.

Date Details - Endorsement
This field details the date that Endorsement was given to the Application.

Date Details - Expiry
This Field details the actual Expiry Date for this Application.

Date Details – Amended Application Date
This field details the Amended Application Date – this date can be entered at any time and reflects a change in the Application Date without amending the original Application Date – leaving any calculations of times periods as initially generated.

Date Details – ABS/BCC Extract Date
This field will automatically detail the date that information has last been extracted and sent to the ABS or BCC.

Date Details – DPIWE Extract Date
This field will automatically detail the date that information has last been extracted and sent to the Department of Primary Industry.

Date Details – Valuations Extract Date
This field will automatically detail the date that information was extracted, if there is an entry in this field then the Application will be excluded from future runs.

Processing Details - Status

The Status Field details exactly at what stage the Application 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.

Processing Details - Processing Group

The Processing Group may contain the details of the Particular Group that will be responsible for Processing this Application. Some Councils may have several different locations, such as a Depot, or Branch Office. By Setting up Processing Groups particular Applications 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.

Processing Details - Municipality Code

The Municipality Code displays the code relating to the Municipality for the Application. This code is used in either the BCC or ABS reports

If the Code 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.

Processing Details – Include in ABS
If the parameters for the Application Type have been set to include this information in the ABS extract then this field is displayed 'ON'. The User is able to then override this default by deselecting the checkbox.

Processing Details – Include in BCC
If the parameters for the Application Type have been set to include this information in the BCC extract then this field is displayed 'ON'. The User is able to then override this default by deselecting the checkbox.

Processing Details – Include in DPIWE
If the parameters for the Application Type have been set to include this information in the DPIWE extract then this field is displayed 'ON'. The User is able to then override this default by deselecting the checkbox.

Processing Details – Include in PPARS
If the parameters for the Application Type have been set to include this information in the PPARS extract then this field is displayed 'ON'. The User is able to then override this default by deselecting the checkbox thus excluding this particular Application from the PPARS process.

Processing Details – Correction to PPARS
By setting this option ON indicates that the data included in this extract is for corrections to a previous extract.

Processing Details - First Stage
If the checkbox is on then the Lodgement process allows an Application to be lodged as Stage 0 or Stage 1 depending on the Numbering Code parameter.

Processing Details – Account Method Override
The Account Method Override field is displayed on the Application 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 Application 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 Application then the Account Method field will become non-editable and will not be able to be changed.

NOTE:- When the Account Method for an Application has been set to Pathway Debtors then it is necessary for any Receipts to be raised against the Debtor Invoice and not against the Application. These Receipts will need to be created as DAP type Receipts with the Payment Reference being nominated in the Qualifier field or DR type Receipts. It will not be possible to receipt directly to the Application.

Processing Details – Respond to Referral
When a Decision has been added to the Application and the Respond to Referral has been flagged on for that Decision, then this field will be flagged on as well. This field is then used to determine if the Application is to be included in the Export Process. Once the EDALA Export process has been run and the Application included in that Respond to Referral process then this field will be flagged OFF.

NOTE: - This field will only display where the Application has been created via the EDALA Take Up process. For other Applications entered via the Lodgement process this field will not display.

Processing Details – Notify Decision
When a Decision has been added to the Application and the Notify Decision information has been flagged on for that Decision, then this field will be flagged on as well. This field is then used to determine if the Application is to be included in the Export Process. Once the EDALA Export process has been run and the Application included in that Notify Decision process then this field will be flagged OFF.

NOTE: - This field will only display where the Application has been created via the EDALA Take Up process. For other Applications entered via the Lodgement process this field will not display.

Processing Details – Final Approval
When a Decision has been added to the Application and the Final Approval has been flagged on for that Decision, then this field will be flagged on as well. This field is then used to determine if the Application is to be included in the Export Process. Once the EDALA Export process has been run and the Application included in that Final Approval process then this field will be flagged OFF.

NOTE: - This field will only display where the Application has been created via the EDALA Take Up process. For other Applications entered via the Lodgement process this field will not display.

Responsible Officer
The Responsible Officer(s) assigned to this Application are displayed in this field..

Options - Dimension
The Options section consists of four Buttons, the Dimensions Button, the Miscellaneous Data button, Responsible Officer button and the Print Cover Sheet Button.

When either of these buttons is 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 Application, Building, Development or Subdivision. This determines which form will be accessed to record the detail.

Options - Miscellaneous Data
The Options section consists of four Buttons, the Dimensions Button, the Miscellaneous Data button, Responsible Officer button and the Print Cover Sheet Button.

When either of these buttons is selected it will detail to the particular Maintenance Form selected.

Miscellaneous Data is additional general information that can be printed on letters.

Options – Responsible Officer
The Options section consists of four Buttons, the Dimensions Button, the Miscellaneous Data button, Responsible Officer button and the Print Cover Sheet button.

When either of these buttons is selected it will detail to the particular Maintenance Form selected.

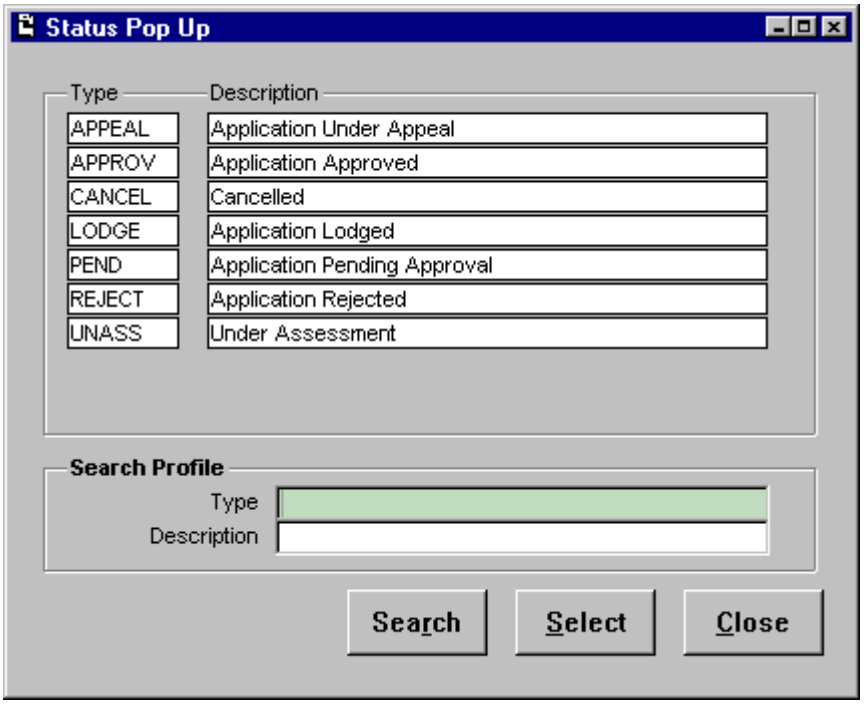
Responsible Officer is where the Officers responsible for the Application are maintained.

Options – Print Cover Sheet
The Options section consists of four Buttons, the Dimensions Button, the Miscellaneous Data button, Responsible Officer button and the Print Cover Sheet button.

When the Print Cover Sheet button is selected it will produce a document using the merge type that has been defined within the Application Type Parameters for the Print Cover Sheet setting. If the Parameter has not been defined within the Application Type then this button is not displayed on the form.

Status Pop Up Form

The Status Pop Up Form allows the User to select from a list of Pre-defined Status Codes. The Form consists of the following fields.



Status Pop Up Form

Type
This field lists the Code given to the Status.

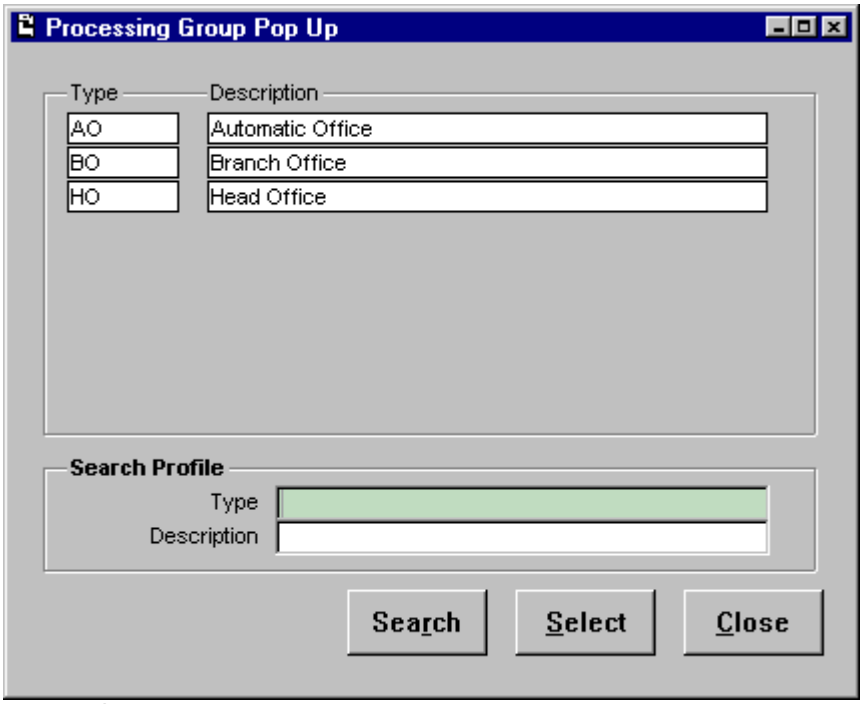
Description
This field details the full Description of the Status.

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.

Processing Group Pop Up Form

The Processing Group Pop Up Form allows the User to select from a list of Pre-defined Processing Group Codes. The Form consists of the following fields.



Processing Group Pop Up Form

Type
This field lists the Code given to the Processing Group.

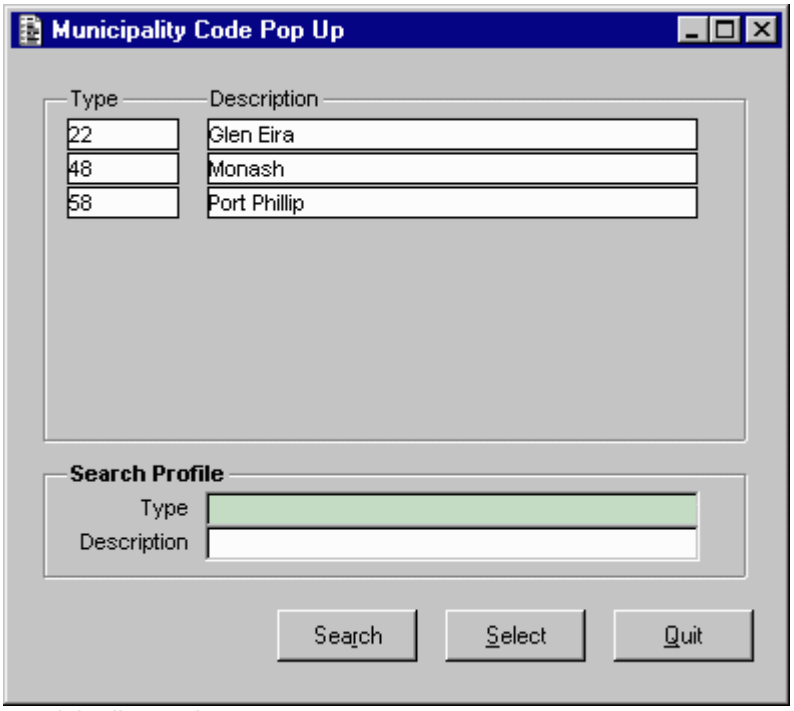
Description
This field details the full Description of the Processing Group.

Search Profile - Type
This field allows the User to Search on a particular Processing Group. 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 Processing Group Description. The User may enter in a full or part Description, the select the Search Button to proceed with the Search.

Municipality Code Pop Up Form

The Municipality Code Pop Up Form allows the User to select from a list of Pre-defined Municipality Codes. The Form consists of the following fields.



Municipality Code Pop Up Form

Type
This field lists the Code given to the Municipality.

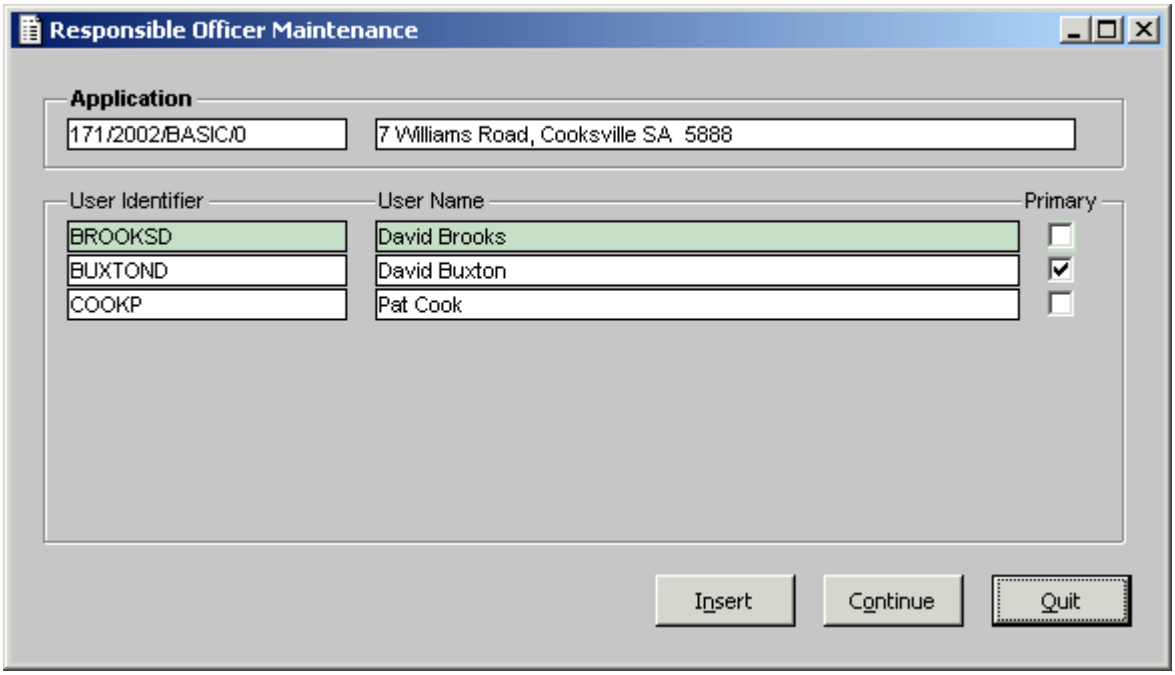
Description
This field details the full Description of the Municipality

Search Profile - Type
This field allows the User to Search on a particular Municipality. 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 Municipality. The User may enter in a full or part Description, the select the Search Button to proceed with the Search.

Responsible Officer Maintenance Form

The Responsible Officer Maintenance Form allows the entry or changing of the Responsible Officers for an Application. There must be a Default Responsible Officer nominated. Therefore the first entered Officer becomes the Default and the User must change the Default flag to the correct Officer if the first Officer is not the Default.



Responsible Officer Maintenance Form

Application

The Application Fields are made up of two sections. The First being the actual Application Number selected and the second being the location of the Application

User Identifier

The User Identifier Field displays the identifier code of the Officer that has been entered.

User Name

The User Name Field displays the name of the Officer that has been entered.

Primary

The Primary Flag is used to nominate the Responsible Officer that is the Primary Officer assigned to the Application.

Building Classifications

The Building Classification forms allow for the maintenance of general Building application details particularly where applications are to be recorded on the Australian Bureau of Statistics Return or certain statistical information is required by Council or other organisations. The Codes and Descriptions for the following areas have been defined in the relevant Parameters:

- Building Type
- Work Types
- Building Classification
- Component
- Materials

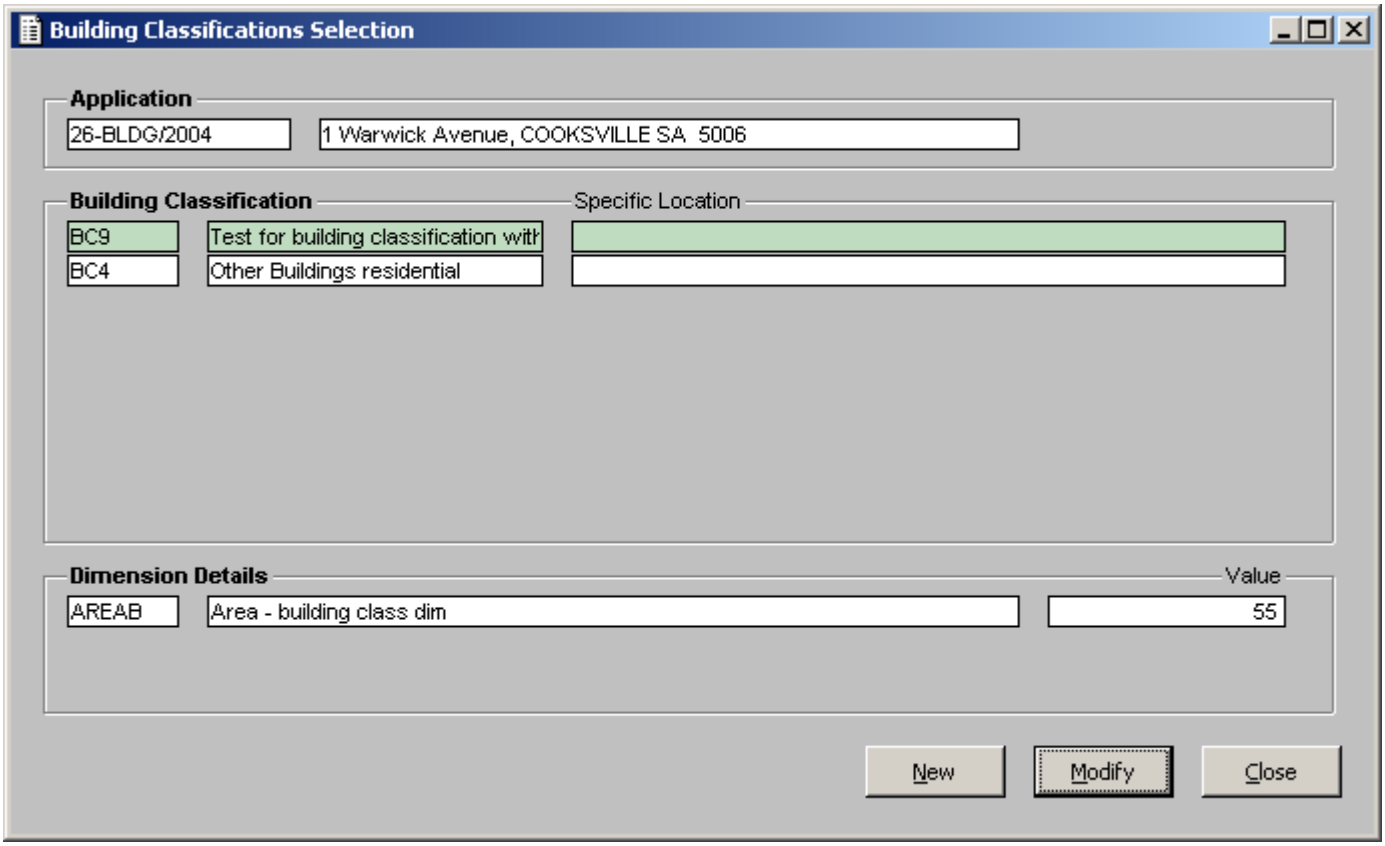
Additional optional fields available for maintenance are:

Private Certifier	Number of Units
Intended Owner	Pre-existing Dwelling
New/Used Material	Trade List
Number of Storeys	Demolish Dwelling
Floor Area	ABS Extract Date
Septic	Dual Occupancy

Building Classifications are entered by selecting the Insert button at the bottom of the Building Classifiction Summary form.
Components (ie. Walls, Floor etc.) are entered by selecting the Building Type that they relate to.

Building Classifications Selection Form

The Building Classifications Selction Form is displayed when Classifications have already been assigned to the Application. If no Building Classifications are on the Application when the Building Classifications Option is selected then the User is presented with the Building Classifications Pop Up Form so as to select the required Classification to be entered.



Building Classifications Selection Form

Application

The Application Fields are made up of two sections. The first being the actual Application Number selected and the second being the location of the Application

Building Classification

As Building Classifications are added to the Application they appear in this area. As the User places focus on the Building Classification so the information displayed in the Dimension Details section will change to reflect the Building Classification in focus.

Building Classification – Specific Location

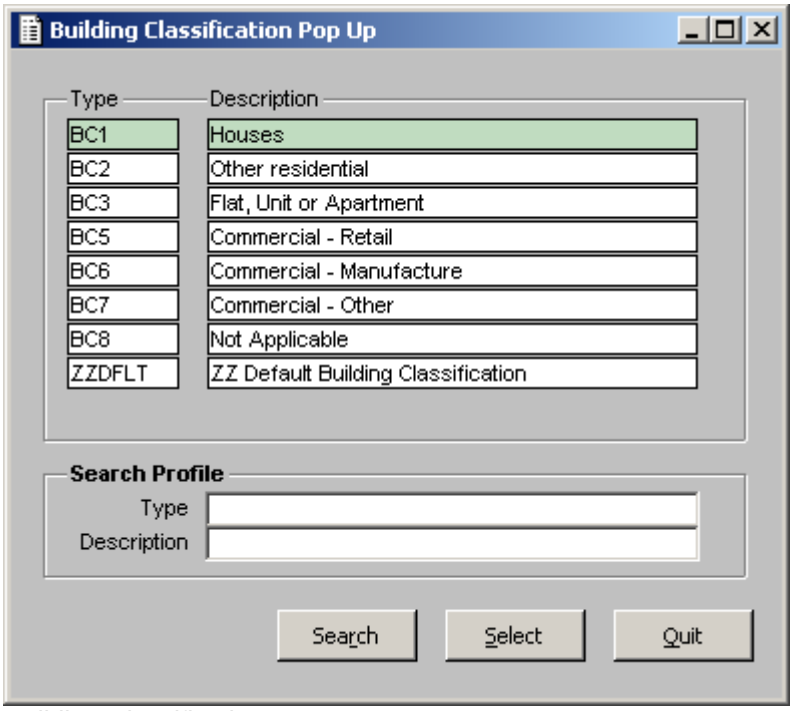
The Specific Location data is entered via the Maintenance form and displays here for the User to see.

Dimension Details

Dimensions that have been entered against the Building Classification currently in focus are displayed here. As the User moves the focus from one Building Classification to the next so the Dimension information will change to reflect the Building Classification in focus.

Building Classification Pop Up Form

This form allows you to select the required Building Classifications. When entering in a Building Classification against an Application for the first time this form will be displayed to allow the User to select the required Building Classification to be added.



Building Classification Pop Up Form

Type
This field contains the Building Classification code.

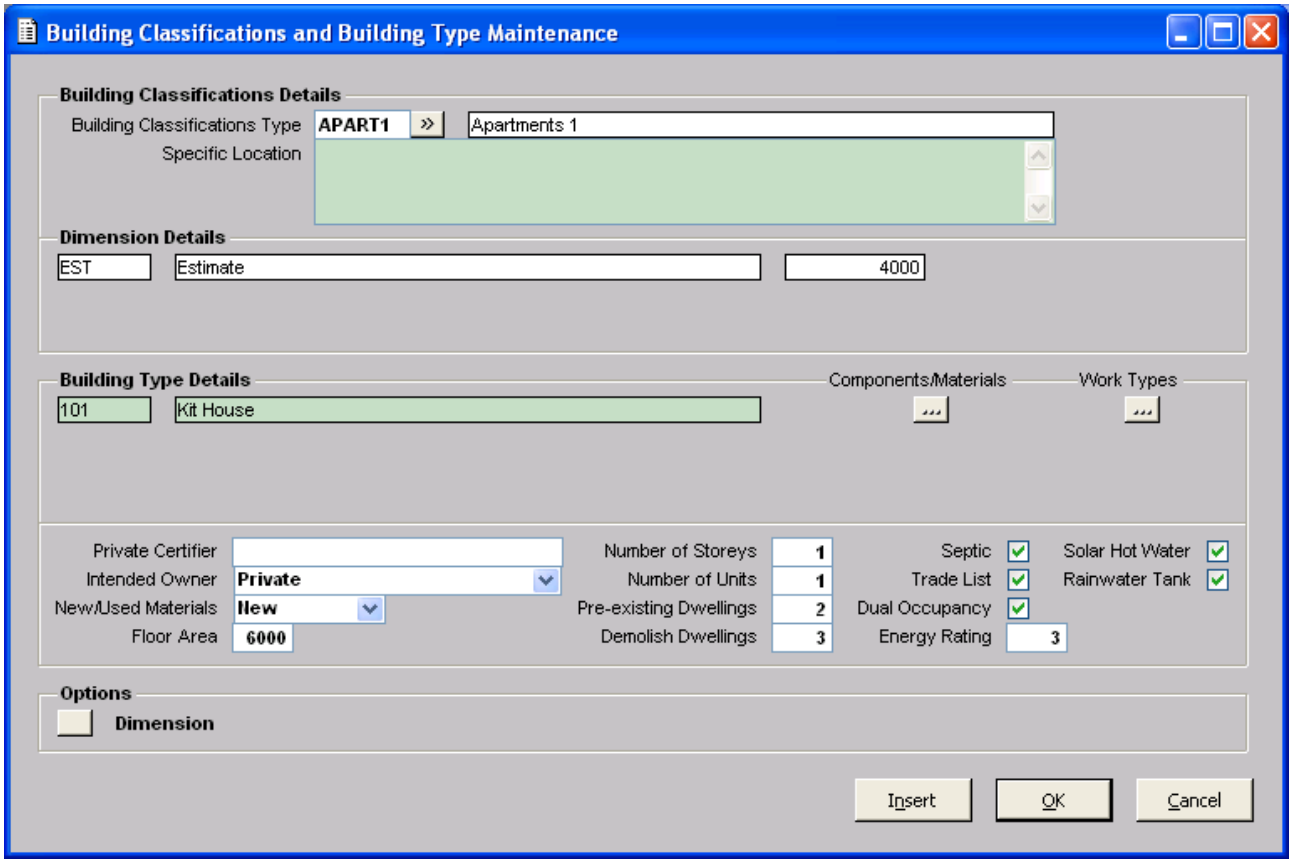
Description
This field contains the full description of the Building Classification.

Search Profile – Type
If a particular Building Classification is required then the Type field can be used to narrow down the selection on the Pop Up Form. Enter in the Type Code, or part thereof, and search. Wildcard searching is available in this field.

Search Profile – Description
If a particular Building Classification is required then the Description field can be used to narrow down the selection on the Pop Up Form. Enter in the Description, or part thereof, and search. Wildcard searching is available in this field.

Building Classifications and Building Type Maintenance Form

The Building Classifications and Building Type Maintenance Form allows the entry of Building Types for the selected Building Classification. Once Building Types have been selected it is then possible for the appropriate Dimensions to be assigned to the Building Classification.



Building Classifications and Building Type Maintenance Form

Building Classifications Details – Building Classifications Type

The Building Classification Type Field displays the Building Classification that is currently being maintained.

Building Classifications Details – Building Classifications Type Description

The Building Classification Type Field displays the Building Classification Description that is currently being maintained.

Building Classifications Details – Specific Location

The Specific Location field allows the User to enter a Specific Location for the Building Classification. This field is multi lined.

Dimension Details

Any Dimensions that have been entered for the Building Classification are shown in this area. The value that has been entered against each Dimension is also shown. Maintenance of the Dimensions can be done by the User selecting the Dimensions Option at the bottom of the form.

Multiple Dimensions can be entered for the Building Classification.

Building Type Details

Any Building Types that have been entered for the Building Classification are shown in this area. Detail Buttons for the Components/Materials and Work Types are available for each Building Type so that the User is able to nominate these for each of the Building Types that have been assigned to the Building Classification.

Multiple Building Types can be entered for the Building Classification.

Building Type Details – Components/Materials

The Detail Button for the Components/Materials is available for each Building Type so that the User is able to nominate these for each of the Building Types that have been assigned to the Building Classification.

Selection of the Components/Materials Button will display the Components and the Materials that have been assigned for the Building Type.

Building Type Details – Work Types
The Detail Button for the Work Types is available for each Building Type so that the User is able to nominate these for each of the Building Types that have been assigned to the Building Classification.

Selection of the Work Types Button will display the Work Types that have been assigned for the Building Type.

Private Certifier
This field may be used to enter the number of the Private Certifier responsible on this Application.

Intended Owner
This field may be used to show the type of intended owner if known on this Application. The options available from the dropdown are :-

- Private (default)
- Government
- Unknown
- Local Government
- State Government
- Commonwealth Government

New/Used Materials
This field may be used to detail if the materials used in the construction of this Application are New or Used. A dropdown box allows you to select from the pre-defined list. - either New or Used.

Floor Area
This field allows the operator to enter the details of the Floor Area when processing this Application. This field will default to 1.

Number of Storeys
This field may be used to key in the Number of Storeys pertaining to this Application. For example if it is a block of flats that is three storeys high. The number three may be entered in this field. It is not a mandatory field and will default to zero.

Septic
This Field may be checked if the Property pertaining to the Application has a Septic System attached to it.

Number of Units
This field may be used to detail the Number of Units that may be involved in this Application. This field will default to zero.

Trade List
This field enables the operator to check the field if the Information pertaining to this Application is to be added to the “Trade List”

Pre-Existing Dwellings
This field may be used to detail whether there are Pre-Existing Dwellings. This field will default to zero.

Dual Occupancy
This field may be checked if the Application being processed will involve the Location becoming a Dual Occupancy. This would normally be checked in the case of two units on the one parcel of land etc.

Demolish Dwellings
This field enables the operator to add a numeric character, of how many dwellings may be demolished in the Process of the Application. This field will default to zero.

Energy Rating
This field enables the operator to add an energy rating as a numeric value up to 99. This field defaults to blank.

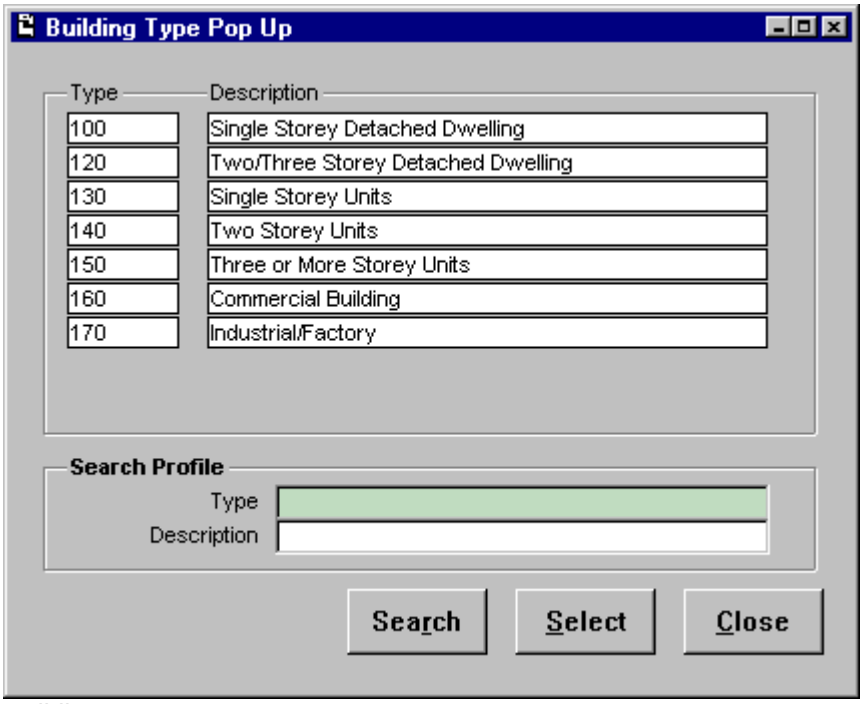
Solar Hot Water
This field may be checked if the building type applicable to this Application includes a Solar Hot Water Heater.

Rainwater Tank
This field may be checked if the building type applicable to this Application includes a Rainwater Tank.

Options - Dimensions
The Dimensions Option may be selected to detail out to the Dimensions that have been assigned to the Building Classification.

Building Type Pop Up Form

The Building Type Pop Up form allows the selection of valid Building Types to be assigned to the Building Classification being maintained.



Building Type Pop Up Form

Type
This field contains the code used for the particular Building Type.

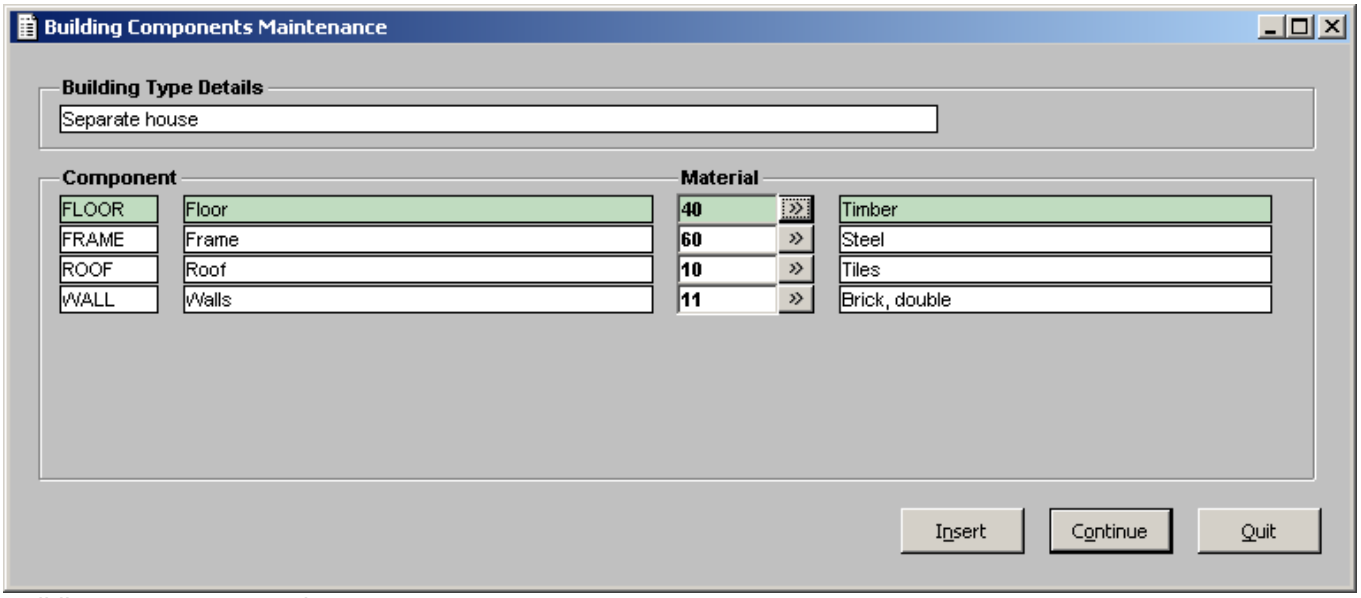
Description
This field is a detailed Description of the Building Type Code.

Search Profile -Type
This field is used to enter a Code or part Code for Searching upon.

Search Profile - Description
The Description field can be used to key in a full or part Description for Searching upon.

Building Components Maintenance Form

The Building Component Maintenance Form allows the User to add a component, and materials to the Building Type. This information may then be used for information, or reporting on at a later date.



Building Components Maintenance Form

Building Type Details

The Building Type field shows the Building Type that the Components and Materials are being added to or already apply to.

Component

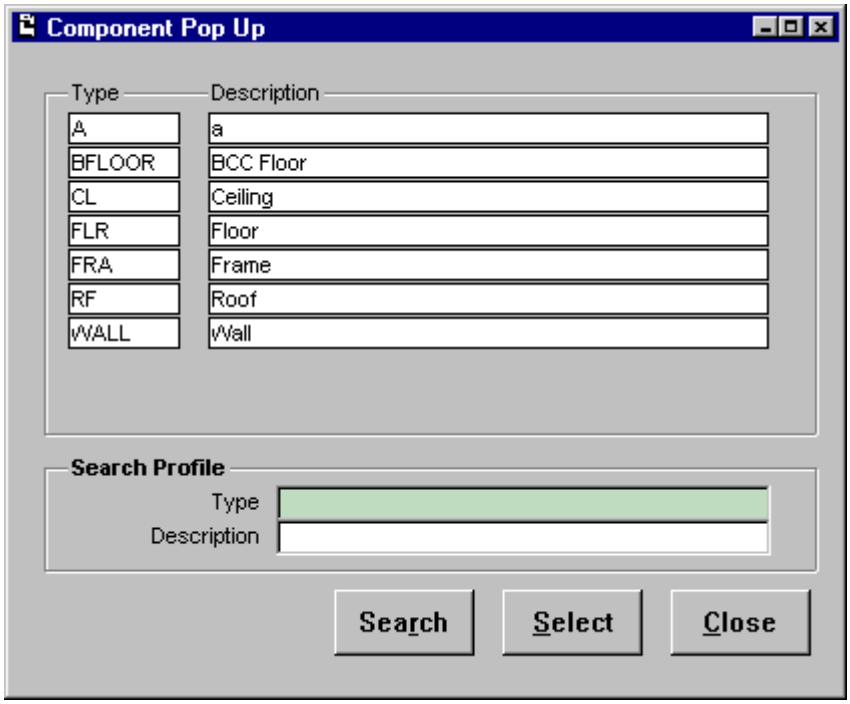
The Component field displays the Component Code. The Material associated to the Component can be assigned to the individual Component.

Material

The Material field allows for the keying of the Material Code or using the Pop Up Button to make a selection from. The Material Code is assigned to the applicable Component Type.

Component Pop Up Form

The Component Pop Up Form details a list of pre-defined Components for selection. The required Component, or Components can be highlighted and selected. Once selected, the User will be returned to the Building Component Maintenance Form.



Component Pop Up Form

Type
This field contains the code used for the particular Component Type

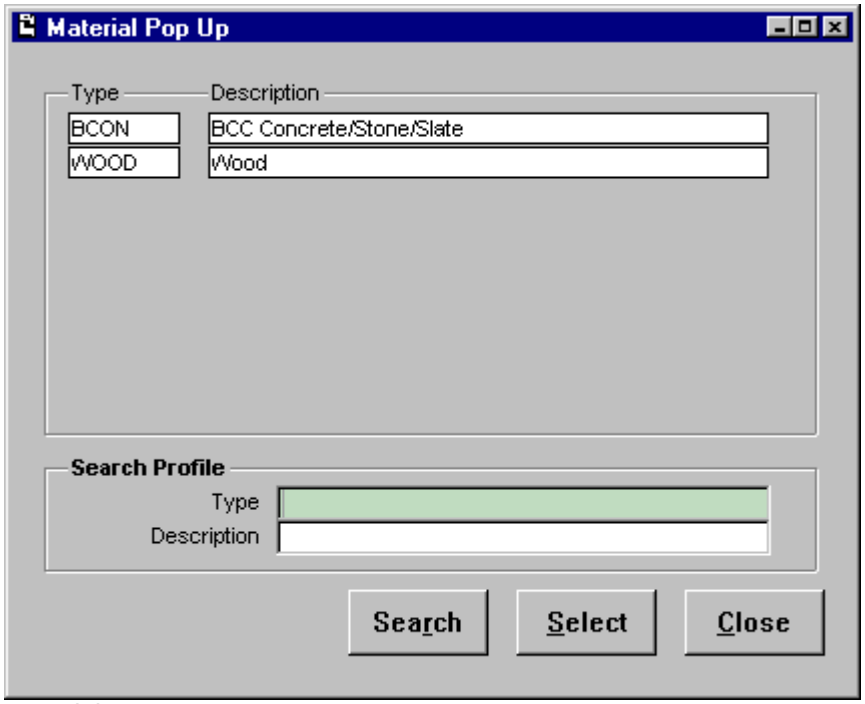
Description
This field is a detailed Description of the Component Type Code.

Search Profile - Type
This field is used to enter a Code or part Code for Searching upon.

Search Profile - Description
The Description field can be used to key in a full or part Description for Searching upon.

Material Pop Up Form

The Material Pop Up Form details a list of pre-defined Materials for selection. The required Material, can be highlighted and selected. Once selected, the User will be returned to the Building Component Maintenance Form.



Material Pop Up Form

Type
This field contains the code used for the particular Material Type

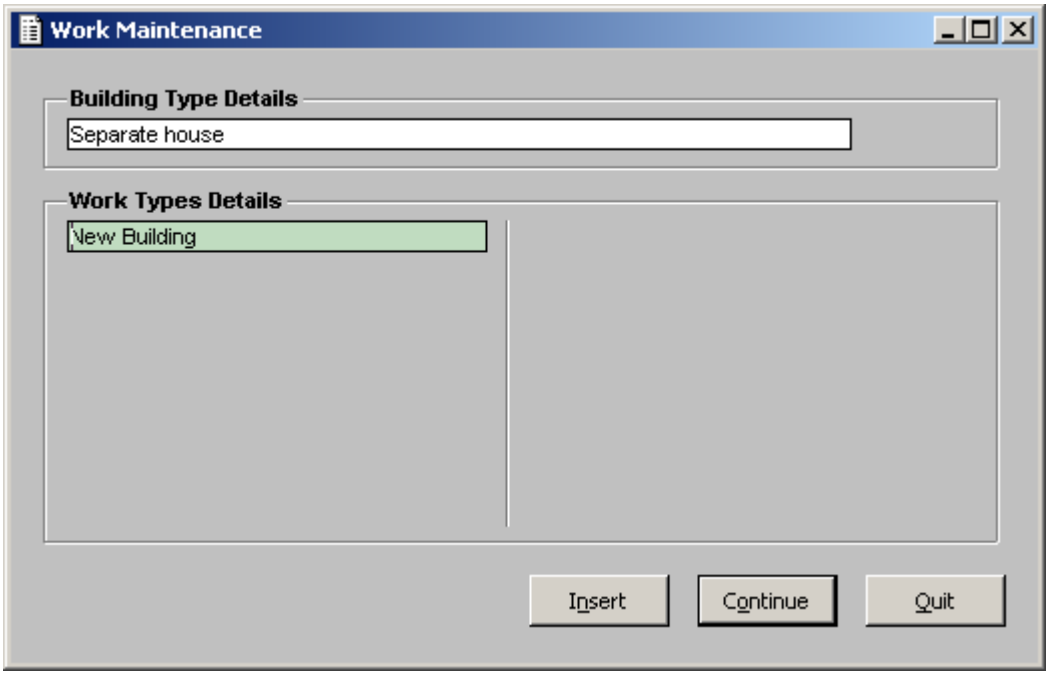
Description
This field is a detailed Description of the Material Type Code.

Search Profile - Type
This field is used to enter a Code or part Code for Searching upon.

Search Profile - Description
The Description field can be used to key in a full or part Description for Searching upon.

Work Maintenance Form

The Work Maintenance Form allows the User to add a work type to the Building Type. This information may then be used for information, or reporting on at a later date.



Work Maintenance Form

Building Type Details

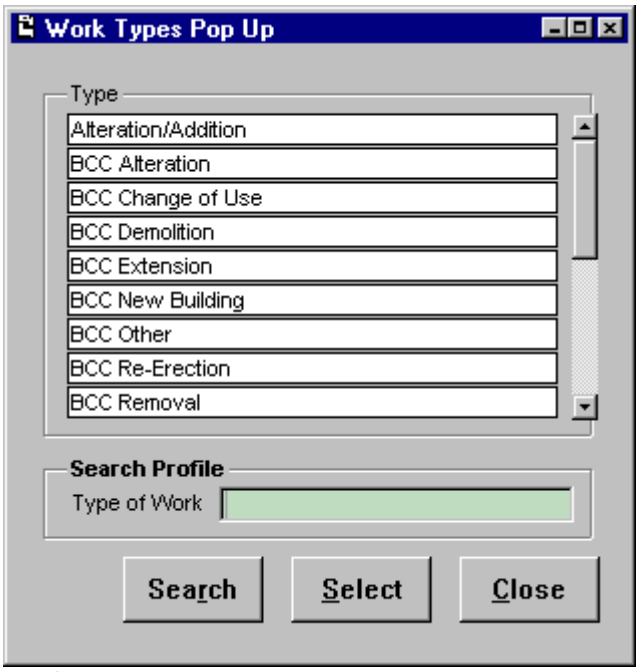
The Building Type field displays the Description of the Building Type that the Work Types are being assigned to or have already been assigned.

Work Type Details

The Work Types that have been assigned to the Building Type are displayed on this form. Selecting the Insert button will allow the User to add additional Work Types if required.

Work Types Pop Up Form

The Work Type Pop Up Form details a list of pre-defined Work Types for selection. The required Work Type, or Work Types can be highlighted and selected. Once selected, the User will be returned to the Work Maintenance Form.



Work Types Pop Up Form

Type
The Work Type Pop Up Form allows for the selection of a Work Type. The Type Field details all the Work Types available.

Search Profile - Type of Work
This field may be used to key in a Work Type or part Work Type to Search upon.

Application – Development & Financial Contributions Details

Application – Development & Financial Contributions Details

The Application Module has been enhanced to include “Development and Financial Contributions” function which allows details of an Application - Development and Financial Contributions to be maintained.

The option “Dev. and Financial Contributions” should be assigned into the Class Maintenance/Enquiry. Once assigned at the Class Level, the Option is then available via Group Maintenance/Enquiry to be assigned to those users with whom the site wishes to allow access.

The Development and Financial Contribution Details form has 4 areas:
- Contribution Details
- Development Contributions
- Financial Contributions
- And Totals

The Contribution Details has following fields:
- Existing Application Type and Number
- Policy Type – drop down select box – with values defined in parameters
- $ Input Type – drop down select box – with values defined in parameters
- $ Input Value – number field (10.2)
- m2 Input Type – drop down select box – with values in parameters
- m2 Input Value – number field (10.4)

The Development Contributions have following fields:
- Development Activity – drop down select box – with values defined in parameters
- Invoiced Amount Incl. GST – number field (10.2)
- Formula Used – drop down select box – with values defined in parameters
- Development Type – drop down select box – with values defined in parameters
- Quantity – number field (10.4)
- Post Lot Subs – alphanumeric field
- Charge Before Deductions – number field (10.2)
- Deduction Reason 1 – drop down select box – with values defined in parameters
- Credit Value 1 – number field (10.2)
- Deduction Reason 2 – drop down select box – with values defined in parameters
- Credit Value 2 – number field (10.2)

The Financial Contributions have following fields:
- Financial Activity – drop down select box – with values defined in parameters
- Invoiced Amount Incl. GST – number field (10.2)
- $ Input Type – drop down select box – with values defined in parameters
- $ Input Value – number field (10.2)
- m2 Input Type – drop down select box – with values in parameters
- m2 Input Value – number field (10.4)
- Credit Value – number field (10.2)

A new set of Development Contribution or Financial Contribution can be added with no limit of the Contributions can be entered, and the scroll bar on the side can be used to display all of them.

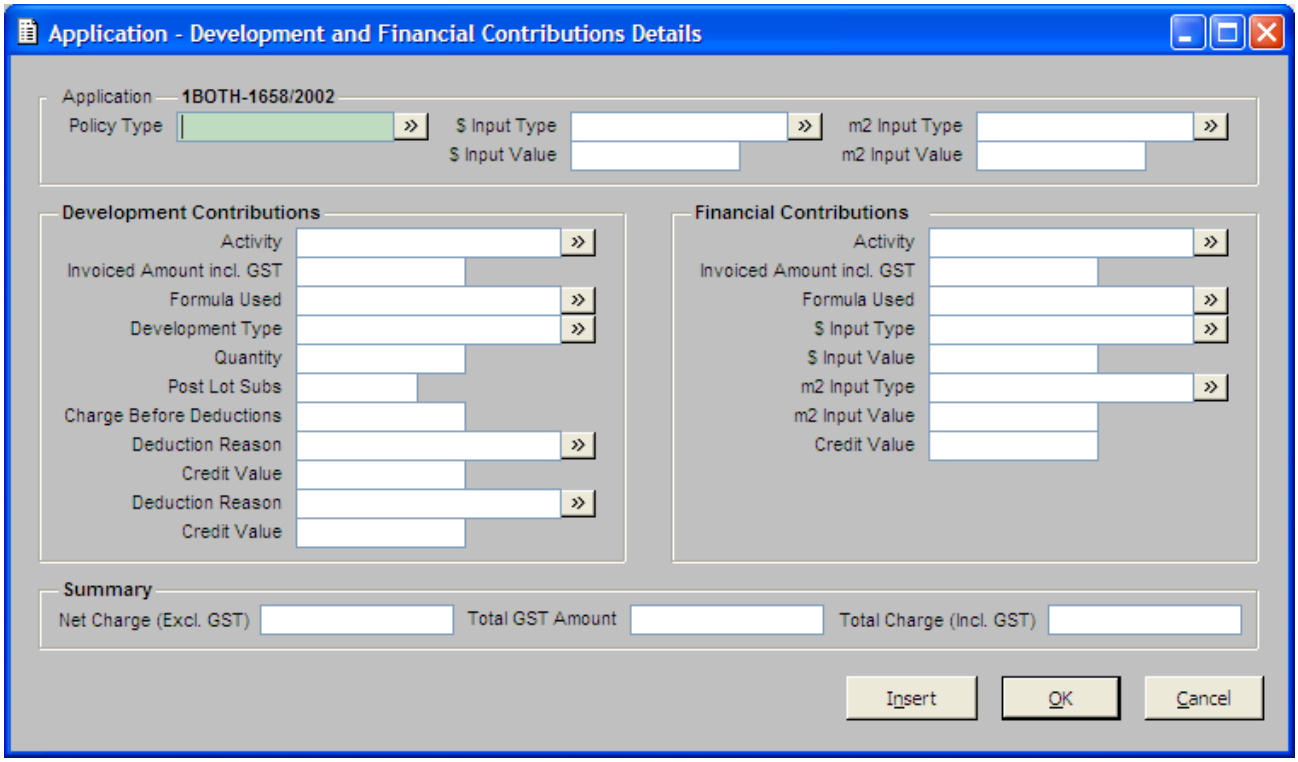
The Totals Section has following fields:

Total of Invoiced Amount Including GST will be placed into the Total Charge (Incl. GST) and based on this value,
- The Total GST Amount and
- The Net Charge (Excl. GST) will be calculated.

Those values can be overridden and if they are cleared then they will be recalculated based on the above rules.

When pressing the 'Insert' Button, the position of the Cursor will determine whether a Development Contribution will be added, a Financial Contribution will be added or a message will be displayed and the user can select which Contribution type to add.

Once the OK Button is selected on the Development and Financial Contribution Details form, all information on the form becomes non editable i.e. Enquiry Mode only. No further modification of this information will be allowed.



Application – Development & Financial Contribution Details Form

Application – Development & Financial Contributions Details – Policy Type
Enter in the required Policy Type or use the selection option to choose from the list of pre-determined Policy Types.

Application – Development & Financial Contributions Details – $ Input Type
Enter in the required $ Input Type or use the selection option to choose from the list of pre-determined $ Input Types.

Application – Development & Financial Contributions Details – $ Input Value
Enter in the $ Input Amount.

Application – Development & Financial Contributions Details – m2 Input Type
Enter in the required square metre type or use the selection option to choose from the list of predetermined m2 Input Types.

Application – Development & Financial Contributions Details – m2 Input Value
Enter in the m2 Input Value amount.

Development Contributions Details – Activity
Enter in the relevant Activity or use the selection option to choose from the list of predetermined Activity tpes.

Development Contributions Details – Invoiced Amount including GST
Enter in the Invoiced amount including any GST amount that has been charged.

Development Contributions Details – Formula Used
Enter in the relevant formula that has been used or use the selection option to choose from the list of predetermined formulae.

Development Contributions Details – Development Type
Enter in the relevant Development Type or use the selection option to choose from the list of predetermined Development Types.

Development Contributions Details – Quantity
Enter in the Quantity details for this Contribution Detail.

Development Contributions Details – Post Lots Subs
Enter in the number of Post Lots Subs Detail.

Development Contributions Details – Charge Before Deductions
Enter in the Charge details before any deductions have been made.

Development Contributions Details – Deduction Reason
Enter in the reason for the deduction or use the selection option to choose from a list of predetermined Deduction Reasons.

Development Contributions Details – Credit Value
Enter in the value of the credit being granted.

Development Contributions Details – Deduction Reason
Enter in the reason for the deduction or use the selection option to choose from a list of predetermined Deduction Reasons.

Development Contributions Details – Credit Value
Enter in the value of the credit being granted.

Financial Contributions – Activity
Enter in the relevant Activity or use the selection option to choose from the list of predetermined Activity tpes.

Financial Contributions – Invoiced Amount Including GST
Enter in the Invoiced amount including any GST amount that has been charged.

Financial Contributions – Formula Used
Enter in the relevant formula that has been used or use the selection option to choose from the list of predetermined formulae.

Financial Contributions – $ Input Type
Enter in the $ Input Amount.

Financial Contributions – $ Input Value
Enter in the $ Input Value.

Financial Contributions – m2 Input Type
Enter in the required square metre type or use the selection option to choose from the list of predetermined m2 Input Types.

Financial Contributions – m2 Input Value
Enter in the $ Input Amount.

Financial Contributions – Credit Value
Enter in the value of the credit being granted.

Development & Financial Contributions Details – Summary – Net Charge (Excl GST)
This field contains the Net Total charge (including GST). This field is not maintainable.

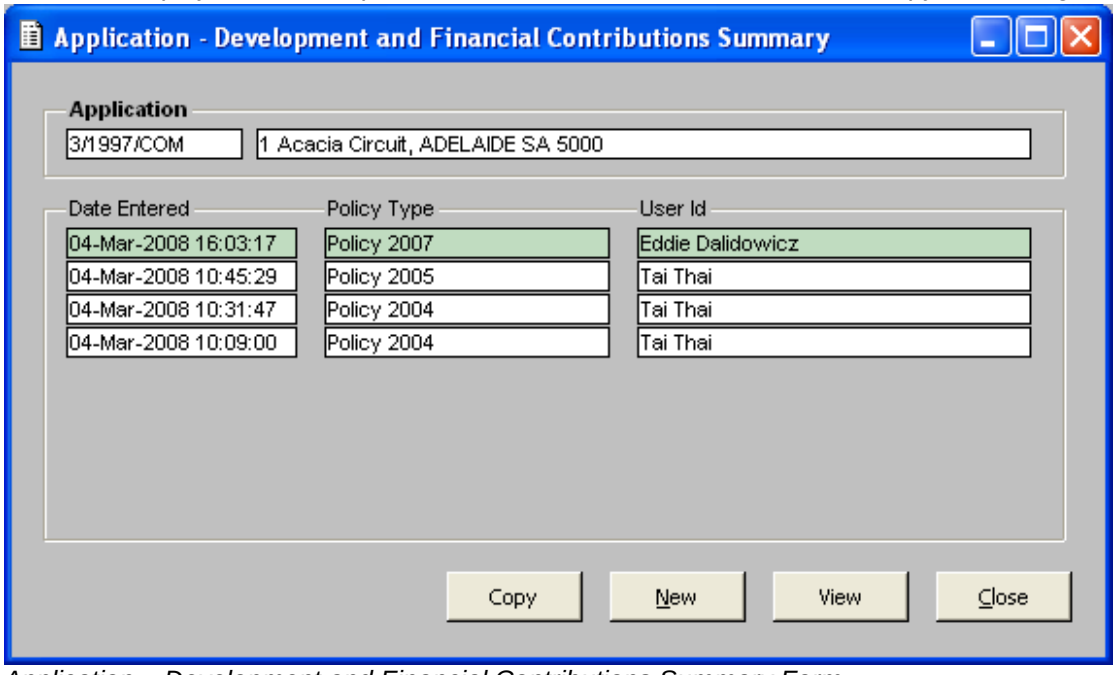
Development & Financial Contributions Details – Summary – Total GET Amount
This field contains the Total GST Amount

Development & Financial Contributions Details – Summary – Total Charge (Incl GST)
This field contains the Total Amount which includes any GST that may have been charged. This field is not maintainable.

Development and Financial Contributions Summary

When the Development and Financial Contributions Details form is saved via the OK Button, the 'Development and Financial Contributions Summary' form is displayed.

Upon entry to the Application Maintenance Options at any other time, this summary of previously created records is displayed with the option to add a new calculation, or to view or copy an existing calculation.



Application – Development and Financial Contributions Summary Form

The 'Development and Financial Contributions Summary' form displays the date the calculation was added, which policy type relates and the user ID of the person who created the calculation.

A user can select an existing calculation row and select the view button to display detail on the record.

This form has a 'New' button which open a new Development and Financial Contribution Detail form. When the Development and Financial Contribution detail form is saved, the user is returned to the Summary form and new calculation row with the date, policy type and userid of the person who created the record is shown.

From this form, user can highlight an existing calculation record and click on 'Copy' Button which will take the user to a new details form with the values from the previous selected detail row copied into the new detail row. These values can be altered while the form is still open, however once the user selects OK, no modifications can be made.

Development & Financial Contributions Details – Summary – Application
This field contains the formatted application number. This field is display only.

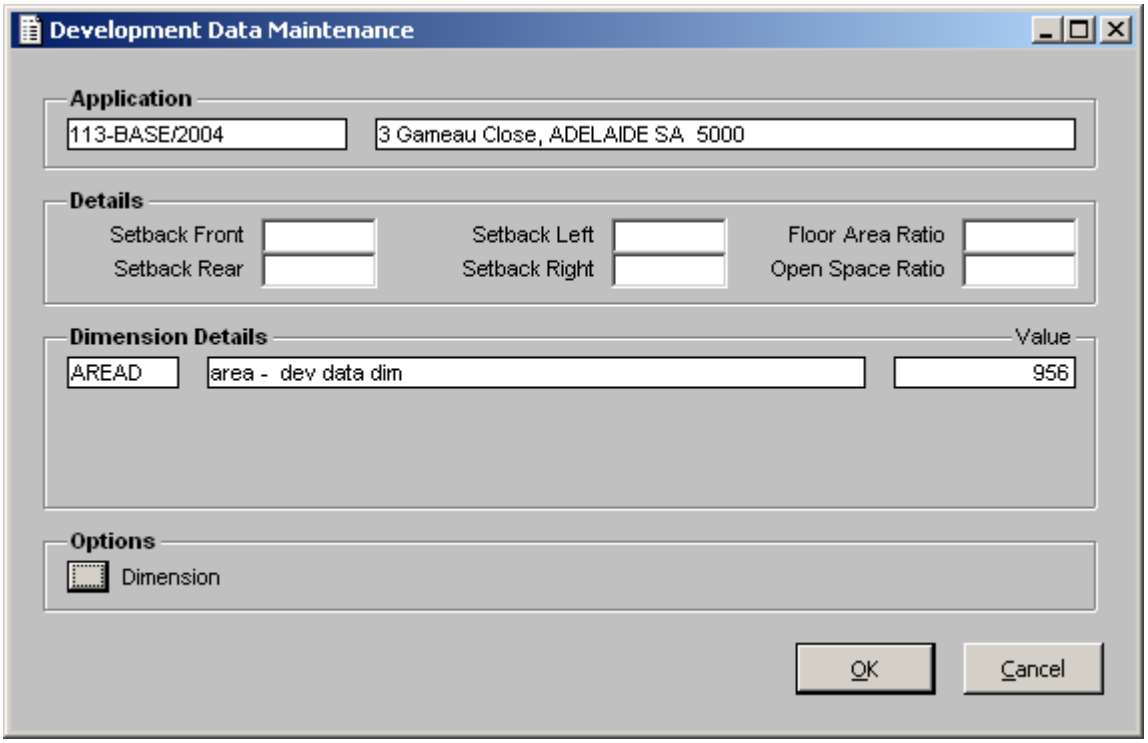
Development & Financial Contributions Details – Summary – Location
This field containd the location for the application. This field is display only.

Development & Financial Contributions Details – Summary – Date Entered
This field is the date and time of the entry. This field is display only.

Development & Financial Contributions Details – Summary – User ID
This field displays the User Id who entered the data. This field is display only.

Application – Development & Financial Contributions Details – Development Data Maintenance Form

This form is designed to store information on Development Data



Development Data Form

Application

This field details the Code for the Application and the actual primary Location.

Details - Set Back Front

This field details the numeric value for the Front Set Back.

Details - Set Back Left

This field details the numeric value for the Left Set Back.

Details - Floor Area Ratio

This field details the numeric value of the Floor Area Ratio.

Details - Set Back Rear

This field details the numeric value of the Rear Set Back.

Details - Set Back Right

This field details the numeric value of the Right Set Back.

Details - Open Space Ratio

This field details the numeric value of the Open Space Ratio.

Dimension Details

These fields detail the specific Dimensions that may be assigned to the Development Data.

Option - Dimension

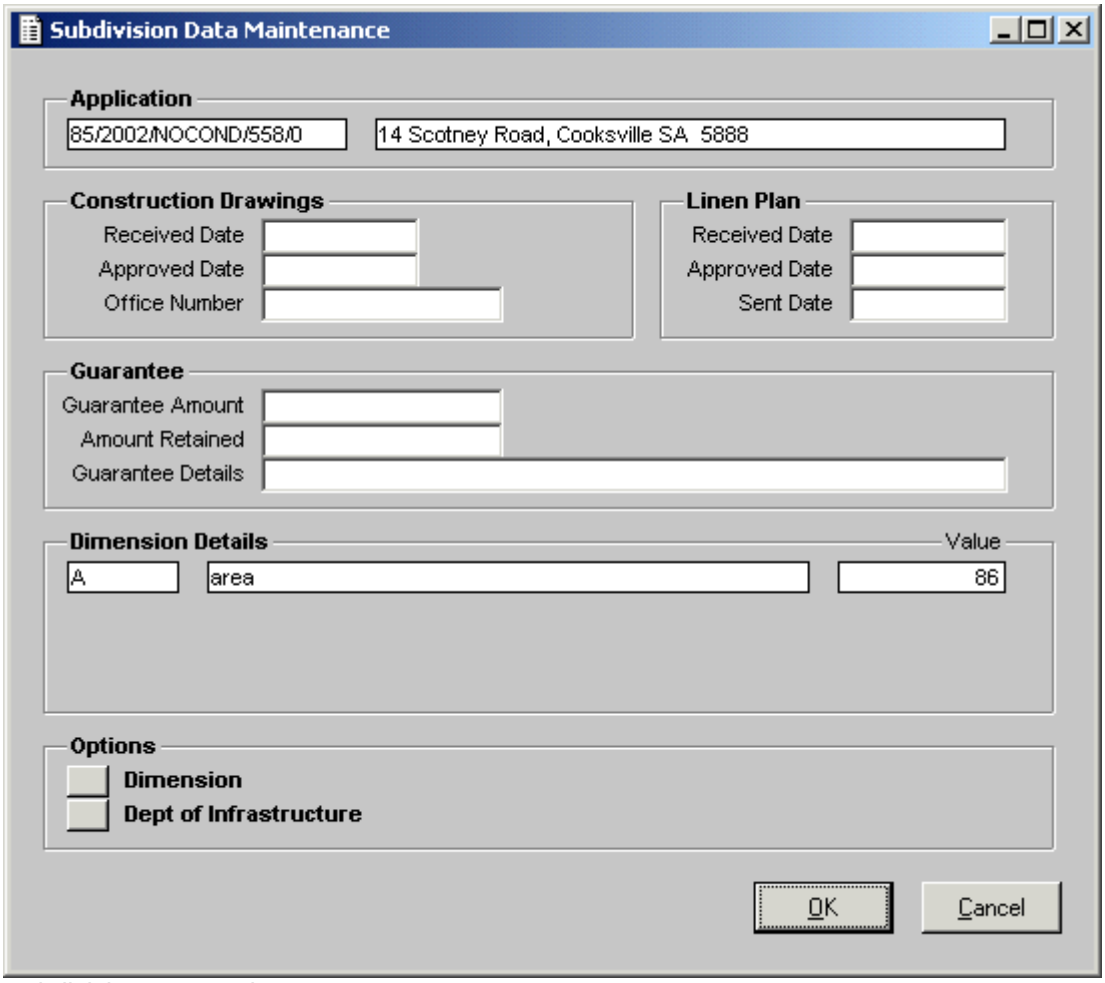
The Options Dimension Button will take the User to the Dimension form where the User is able to modify, add or delete the Dimensions that have been assigned to the Development Data.

Subdivision Data

This option allows for general Subdivision Data to be recorded ie. Linen Plan, Construction Drawings. Subdivision Dimensions are entered by selecting the Dimensions button at the bottom of the Subdivision Data form.

Subdivision Data Maintenance Form

The Subdivision Data Form is used to store information on Subdivisions and consists of the following fields:-



Subdivision Data Maintenance Form

Application
These fields detail the Application Number that is currently displayed and its primary Location.

Construction Drawings - Received Date
This field details the date that Construction Drawings were received.

Construction Drawings - Approved Date
This field details the date that Construction Drawings were Approved.

Construction Drawings - Office Number
This field details the number that has been allocated to the Office holding the Construction Drawings.

Linen Plan - Received Date
This field details the date that the Linen Plan was received.

Linen Plan - Approved Date
This field details the date that the Linen Plan was Approved.

Linen Plan - Sent Date
This field details the date that the Linen Plan was sent.

Guarantee Amount
This field details the amount of money that is to be Guaranteed against the Construction.

Amount Retained
This field details the amount of the Guarantee that is to be retained.

Guarantee Details
This field can hold any particular details pertaining to the guarantee.

Dimension Details

These fields detail the particular dimension that may be attached to the Subdivision. The fields show the Code, Description and Value of the Dimensions.

Options - Dimension

The Dimensions button when clicked will detail out to the Dimension Maintenance Form, where Dimensions may be added or modified against this Subdivision Data.

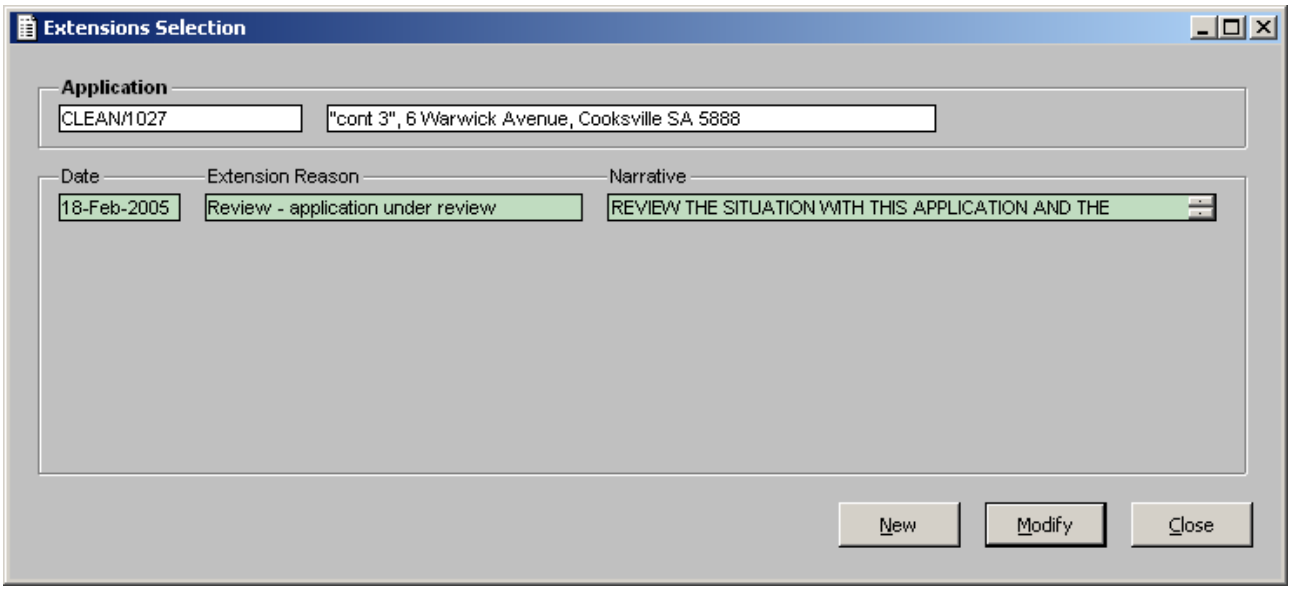
Options – Dept of Infrastructure
The Dept of Infrastructure button when clicked will detail out to the Department of Infrastructure Maintenance Form, where information may be added or modified against this Subdivision Data.

Extensions Maintenance

The Extensions Maintenance function allows for the recording of the reason why an Application has been extended. It allows a reason, notes and the new dates to be entered. Upon accepting this form the dates for the Application will be updated with the information entered on this form.

Extensions Selection Form

The Extensions Selection Form is displayed when an Extension Record(s) has been entered. This form will not display if no Extension Records exist.



Extensions Selection Form

Application

The Application Fields are made up of two sections. The First being the actual Application Number selected and the second being the location of the Application

Date

The Date field displays the Date that the Extension Date that was entered on the Extension Maintenance form.

Extension Reason

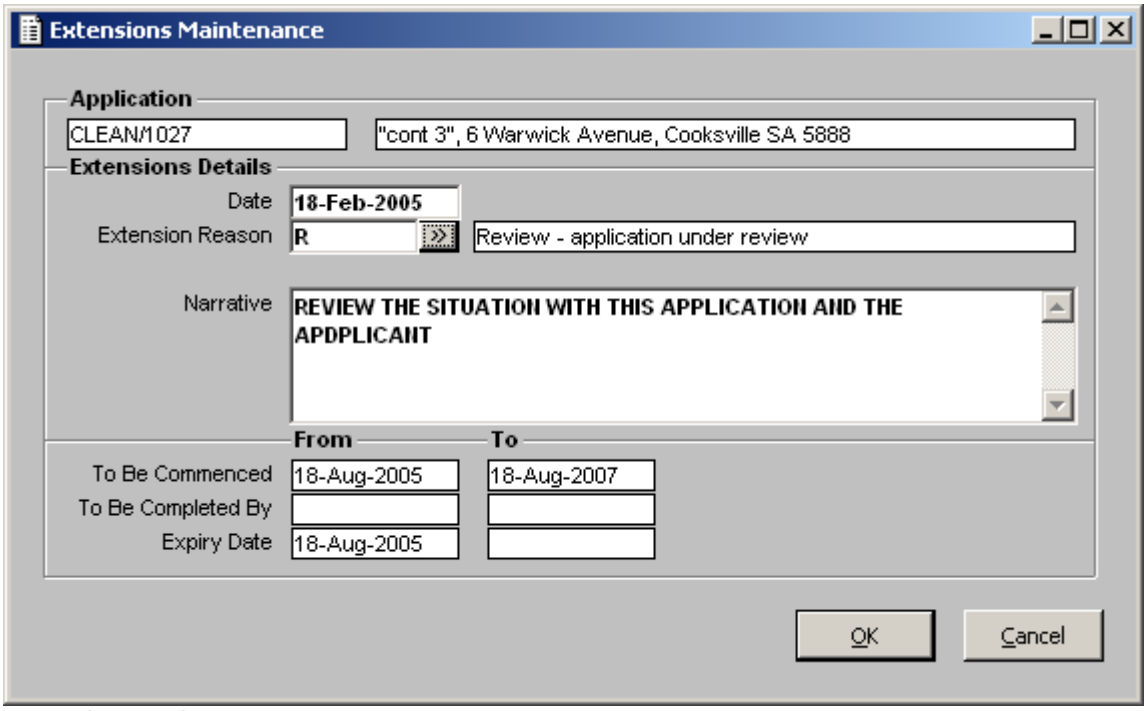
The Extension Reason field displays the Description of the Reason that has been applied to the Extension Record.

Narrative

The Narrative shows any Narrative information that has been entered at the time the Extension Record was created or maintained.

Extensions Maintenance Form

The Extensions Maintenance function allows for the recording of the reason why an Application has been extended. It allows a reason, notes and the new dates to be entered. Upon accepting this form the dates for the Application will be updated with the information entered on this form.



Extensions Maintenance Form

Application

The Application Fields are made up of two sections. The First being the actual Application Number selected and the second being the location of the Application

Extensions Detail - Date

The Date that the Extension was lodged is entered into this field.

Extensions Detail – Extension Reason

The Reason for the Request for an Extension is entered into this field. The code can be entered directly, or if not known the Pop Up button can be selected to display a list of valid Reason Codes.

Extensions Detail - Narrative

The Narrative field allows for the entry of additional information. This is a free form field.

To Be Commenced - From

The From To be Commenced Date is displayed in this field. This date is from the Application Data Form and cannot be maintained on this form.

To Be Commenced - To

The To – To Be Commence field allows the User to enter in the new Date for the To Be Commenced date. Upon accepting this form this date will be updated on the Application Data Form.

To Be Completed By - From

The From – To Be Completed By Date is displayed in this field. This date is from the Application Data Form and cannot be maintained on this form.

To Be Completed By - To

The To – To Be Completed By field allows the User to enter in the new Date for the To Be Completed By date. Upon accepting this form this date will be updated on the Application Data Form.

Expiry Date - From

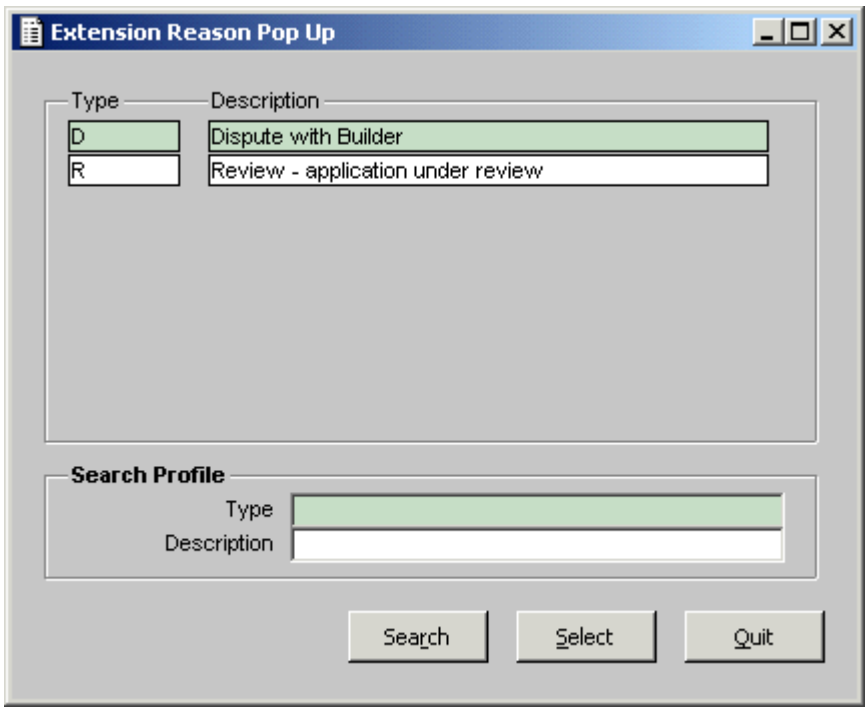
The From – Expiry Date is displayed in this field. This date is from the Application Data Form and cannot be maintained on this form.

Expiry Date - To

The To – Expiry Date field allows the User to enter in the new Date for the Expiry Date. Upon accepting this form this date will be updated on the Application Data Form.

Extension Reason Pop Up Form

The Extension Reason Pop Up form allows the selection of the Reason Code and Description that are required for the Extension Maintenance Form.



Extension Reason Pop Up Form

Type / Description

The Reason Code and its Description are shown in these fields. The Reason Codes are setup in the Application Parameters. Only Valid Reason Codes are displayed on the Pop Up Form.

Search Profile - Type

The Search Profile – Type can be used to search for a particular Type or Types. Enter in the Type required or part thereof and select the Search Button. The list will be refined down to the entered Search Detail. Wildcard Searching is available on this field.

Search Profile - Description

The Search Profile – Description can be used to search for a particular Description or Descriptions. Enter in the Description required or part thereof and select the Search Button. The list will be refined down to the entered Search Detail. Wildcard Searching is available on this field.

Department of Infrastructure Details Maintenance

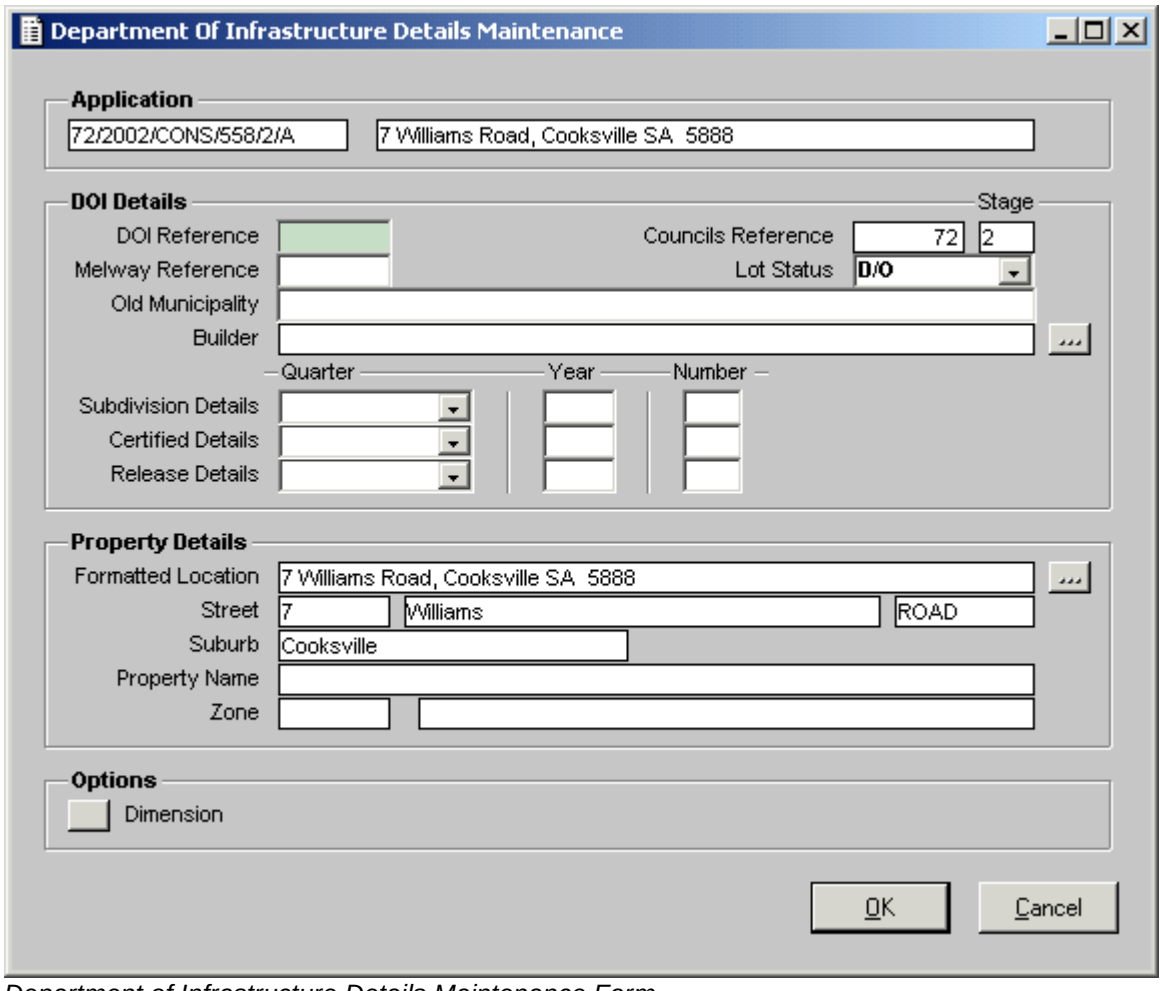
The Department of Infrastructure Details Form allows entry and maintenance of data applicable to the Department of Infrastructures (DOI) requirements for Residential Land Monitoring.

Some of the required information is extracted from other modules such as the Property and Builder details.

The Lot Size requirement by the DOI is applied using a subdivision Dimension and hence a link is provided under the Options section to access the Dimensions Maintenance Form. Once details have been entered in on the DOI Maintenance Form a link is available from the Subdivision Maintenance Form to the DOI Details Maintenance information.

Department of Infrastructure Details Maintenance Form

The DOI Maintenance Form allows entry or maintenance of information required to be extracted on the DOI Report. This information comes from other modules such as Property and Builder information.



Department of Infrastructure Details Maintenance Form

Application

The Application Fields are made up of two sections. The First being the actual Application Number selected and the second being the location of the Application

DOI Details - DOI Reference

The Department of Infrastructure Reference is entered into this field.

DOI Details - Councils Reference
The Councils Reference is the Application Number. This is defaulted from the application.

DOI Details - Stage
If the Application being maintained has been Staged, then the Stage number is displayed in this field. It is automatically defaulted from the application.

DOI Details - Melway Reference
The Melway Reference for the property can be entered into this field.

DOI Details - Lot Status
The Lot Status can be one of the following :-
- D/O
- M/U

DOI Details - Old Municipality
The Old Municipality can be used to record the information regarding the property prior to the change in Council. This could have been due to a merge of Councils.

DOI Details - Builder
When creating the Department of Infrastructure Details the Builder Information is automatically displayed from the Application if Builder records have been recorded on the Names Maintenance form. The Detail Button for the Builder Name is a link to Names Maintenance Form. From Names Maintenance you can select an existing Builder or if security allows create a new Builder Name to be included.

DOI Details - Subdivision Details - Quarter
The Quarter that the Subdivision Details were recorded is selected from this dropdown option. Months available for selection are :-
- Blank
- March
- June
- September
- December

The Month represents the last month for the Quarter required to be reported.

DOI Details - Subdivision Details - Year
The Year is the year associated with the Quarter entered in the Subdivision Details Quarter field.

DOI Details - Subdivision Details - Number
The Number for the Subdivision is recorded in this field.

DOI Details - Certified Details - Quarter
The Quarter that the Certified Details were recorded is selected from this dropdown option. Months available for selection are :-
- Blank
- March
- June
- September
- December

The Month represents the last month for the Quarter required to be reported.

DOI Details - Certified Details - Year
The Year is the year associated with the Quarter entered in the Certified Details Quarter field.

DOI Details - Certified Details - Number
The Number for the Certified Details is recorded in this field.

DOI Details - Release Details - Quarter
The Quarter that the Release Details were recorded is selected from this dropdown option. Months available for selection are :-
- Blank
- March
- June
- September

- December

The Month represents the last month for the Quarter required to be reported.

DOI Details - Release Details - Year

The Year is the year associated with the Quarter entered in the Release Details Quarter field.

DOI Details - Release Details - Number

The Number for the Release Details is recorded in this field.

Property Details - Formatted Location

When creating the Department of Infrastructure Details the Formatted Location Information is automatically displayed from the Application Location Maintenance form. The Detail Button for the Formatted Location is a link to Location Maintenance Form. From Location Maintenance you can display the property information.

Property Details - Street

The Street information is automatically loaded when the Department of Infrastructure form is displayed. This is broken down into displaying the number of the property, the street name and the street type.

Property Details - Suburb

The Suburb associated to the property is displayed in this form automatically.

Property Details - Property Name

The Property Name associated to the property is displayed in this field.

Property Details - Zone

The Zone information for the property is displayed in this field.

Options - Dimension

The Lot Size requirement by the DOI is applied using a subdivision Dimension and therefore the Dimension Option button is used to access the Dimensions Maintenance form.

Locations

The Locations option is used to record all Property or Street links to the application.

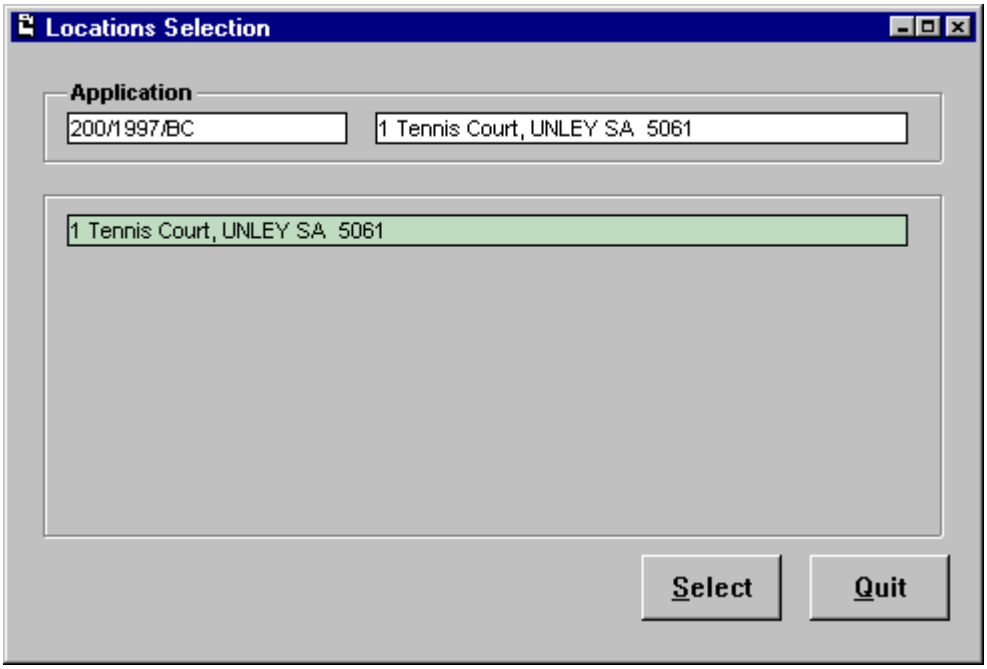
When a location is added you will be presented with the Property Search Profile from which you enter the required property criteria.

Once a property has been found it is selected and returned back to the Locations form. Certain property details are automatically loaded into the Application. Multiple properties may be linked to an application.

It should be noted that if those property details are changed within the property system they will not be reflected within the Applications system. This information is used to record the status of the Property at the time of lodging the application. If you wish to update the loaded property details then press the Refresh Button at the bottom of the form.

A Site Description may be entered (but is not mandatory). This could reflect a more generic name for a group of properties selected ie. Target redevelopment. If the Overwrite Location with Site check box is checked on then any documentation produced will reflect the Site Description rather than the Property Address(s).

Locations Selection Form



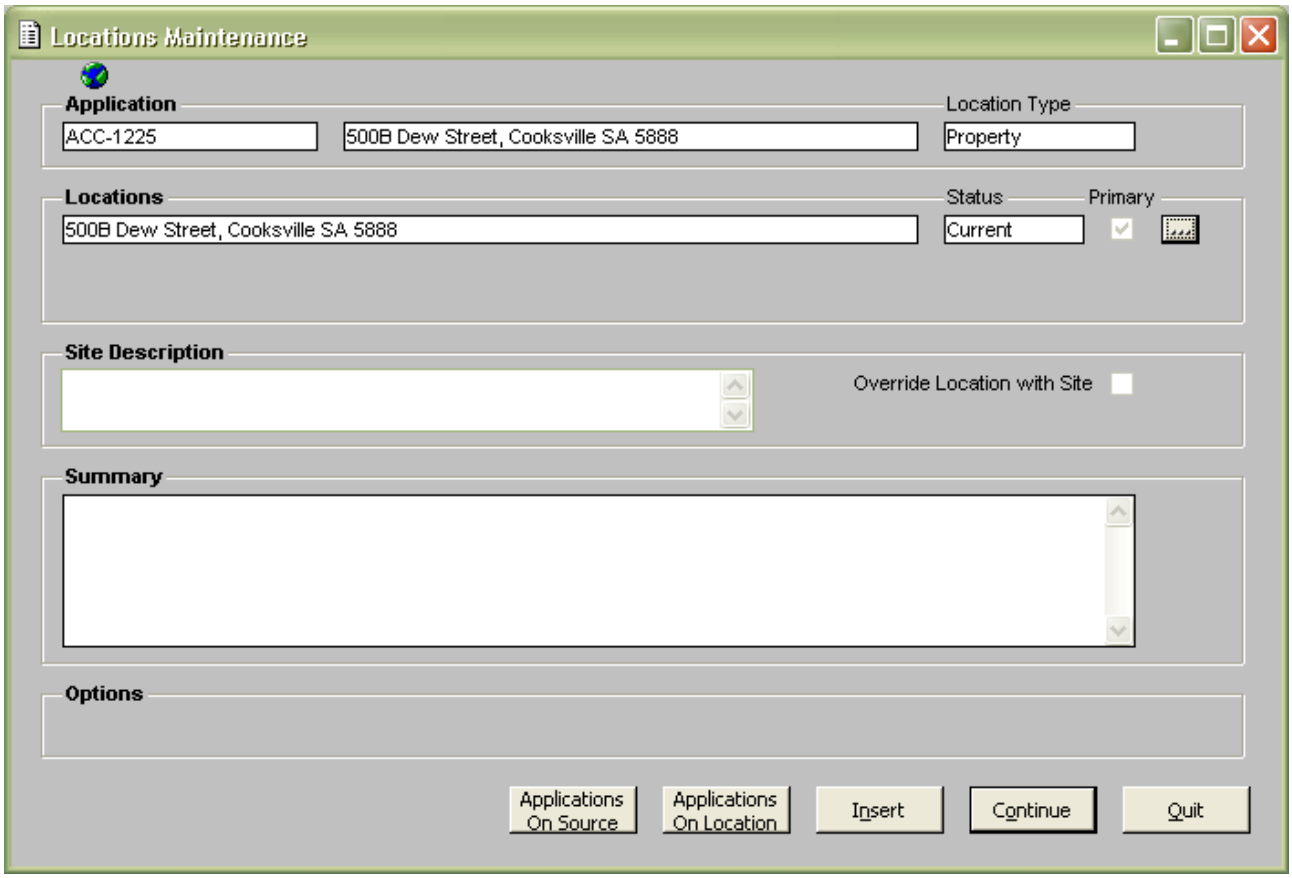
Locations Selection Form

Application
The Application Fields are made up of two sections. The First being the actual Application Number selected and the second being the location of the Application

Locations
This field details all locations attached to the Application.

Locations Maintenance Form

The Locations Maintenance Form details the Application Number and specific details of the Location.



Locations Maintenance Form

Application

The Application Fields are made up of three sections. The First being the actual Application Number selected, the Second being the primary location of the Application and the Third being the Type of Location that has been used. The Type can be either Parcel, Property or Street.

Locations

This field details the Locations assigned to the current Application.

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 Application. Each Application 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 Application 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
Selectin the Location Detail Button will take the User into the Property System and display the selected property's information.

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 details that are assigned to the Application 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.

Applications on Source
This Applications on Source Button may be used to display applications for those properties listed as well as applications for historic properties which are already linked via Property Divisions to the current property.

Applications On Source/Location – Application Maintenance
This field displays the Location of the relevant applications and the application Type. Number and Description.

Applications on Source/Location – Detail Button
Use this button to detail out to the Application details.

Applications on Location
This Applications on Location Button may be used to display applications for those properties listed.

Affected Properties

Affected Property 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.

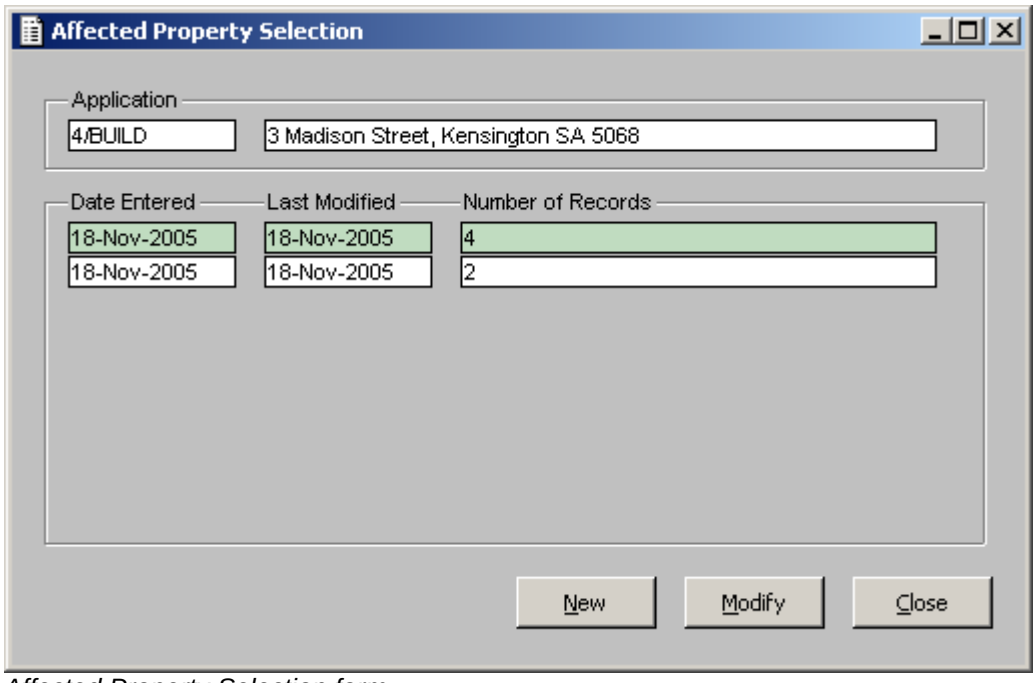
The Affected Property Selection form displays when the Affected Property option is selected. Properties are grouped on this form into sets of Affected Properties for easy identification. Each group has a creation date and a modified date as well as a total number of records in the group.

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.

It is possible to include Proposed Properties in the Affected Properties Selection.



Affected Property Selection form

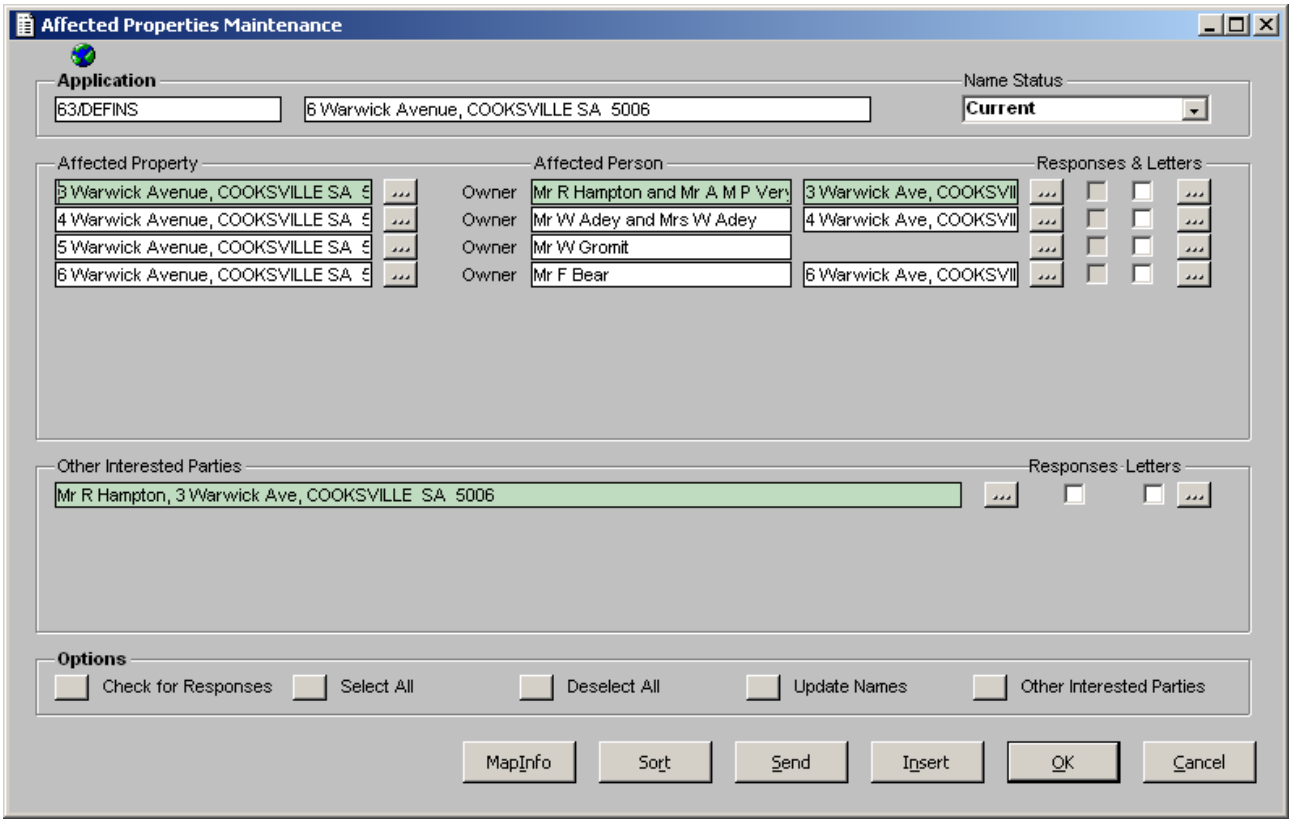
Affected Property Maintenance Form

The Affected Properties form is designed to allow for the selection of Properties that may be affected by the Application and the ability to create Letters and receive Responses.

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 distinguish the difference between the Historic and Current Names the Current Names are bolded and the Historic Names are not bolded.

The Form consists of the following fields:-

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 Form

Application

These fields detail the current Application 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 distinguish 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 Application. Multiple Properties can be selected by using the insert button. Click 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 form allows the User to detail to the list of Affected People.

Affected Person – Mailing Address
The Mailing Address field is only displayed when the Street, Suburb and Postcode of the Affected Person's Mailing Address is the same as the Affected Property that has been selected.

If any part of the Street, Suburb or Postcode does not match that of the Affected Property selected then the Affected Person's Mailing Address is not shown.

This information is presented so that the User is then able to determine if it is necessary for an occurrence of 'The Occupier' to be included on the Affected Property.

Responses
This field if checked will show that Responses have been received regarding this Application. Responses may be added by detailing out to the Letter Summary and adding the particular Response.

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.

Letter Sent
This field if checked 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.

Retrieval of Owners using this button will first check the 'Retrieve owner' and 'Property Reference' settings under Application Lodgement in System parameters, to determine from where the Owner is to be retrieved.

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

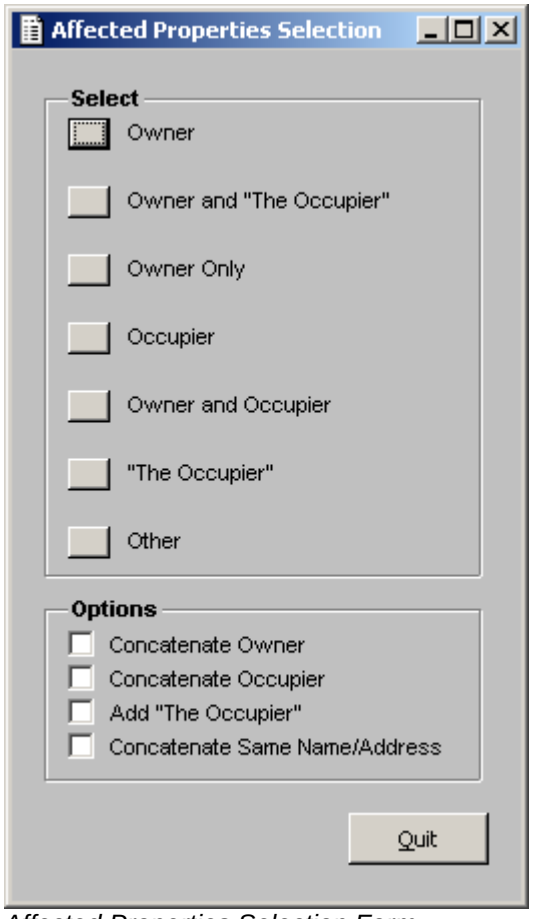
The Affected Property Selection Form consists of a series of buttons, to select the particular Affected Person associated with that Property. This form is displayed when the Insert Button has been selected from the Affected Properties Maintenance Form.

If Affected Properties Default Parameters have been defined within the Application Parameters then the values from the parameter will be defaulted into this form.

NOTE: - 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 and the User will be prompted to search for the affected property.

Refer to the text below the Form for screen captures of the various combinations available and how they are displayed.

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

3 WILLIAMS ROAD

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

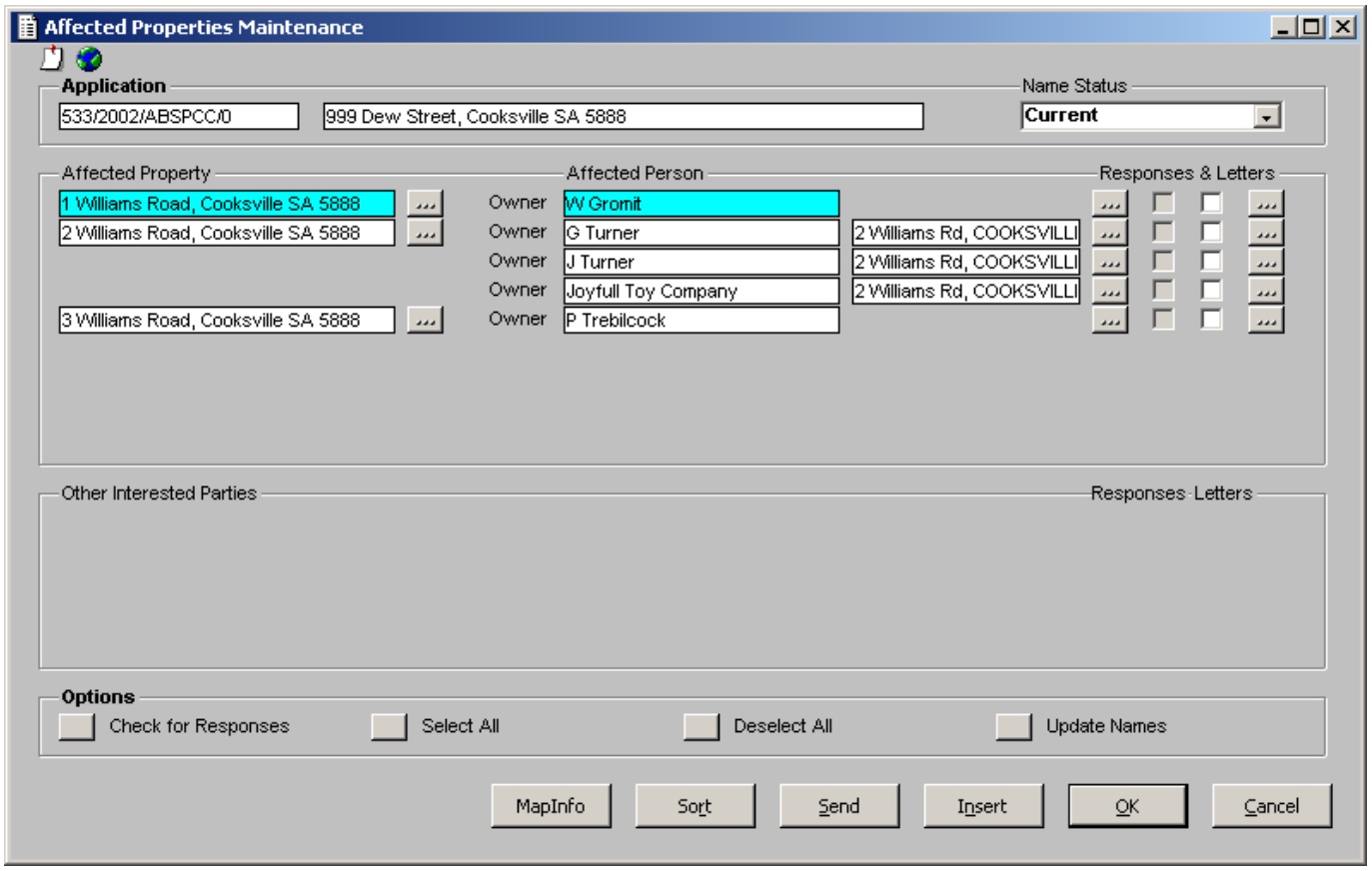
23 WILLIAMS ROAD

OCCUPIER	J YELTEN	8 WILLIAMS ROAD

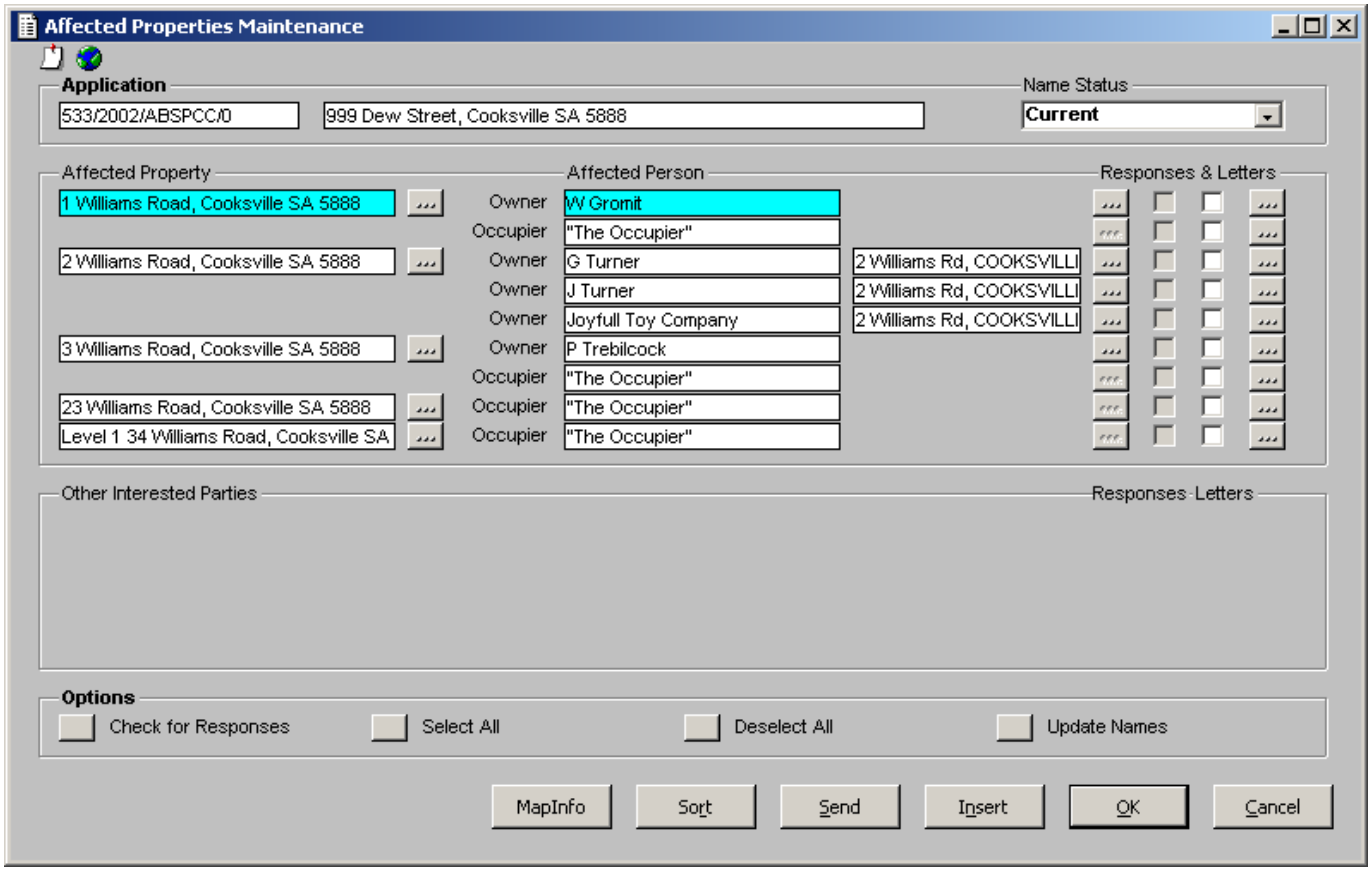
1/34 WILLIAMS ROAD

NO OWNERS OR OCCUPIERS

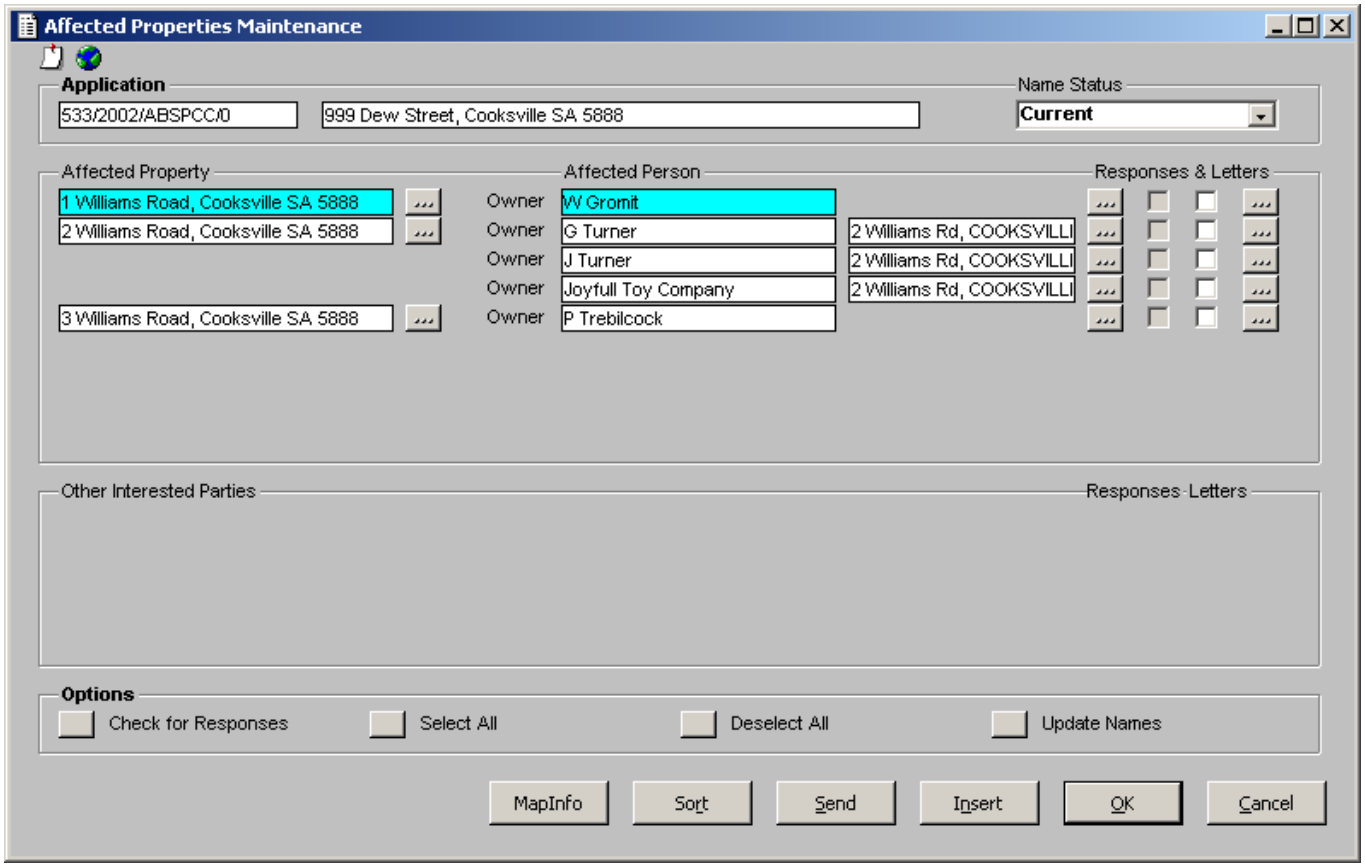
OWNER



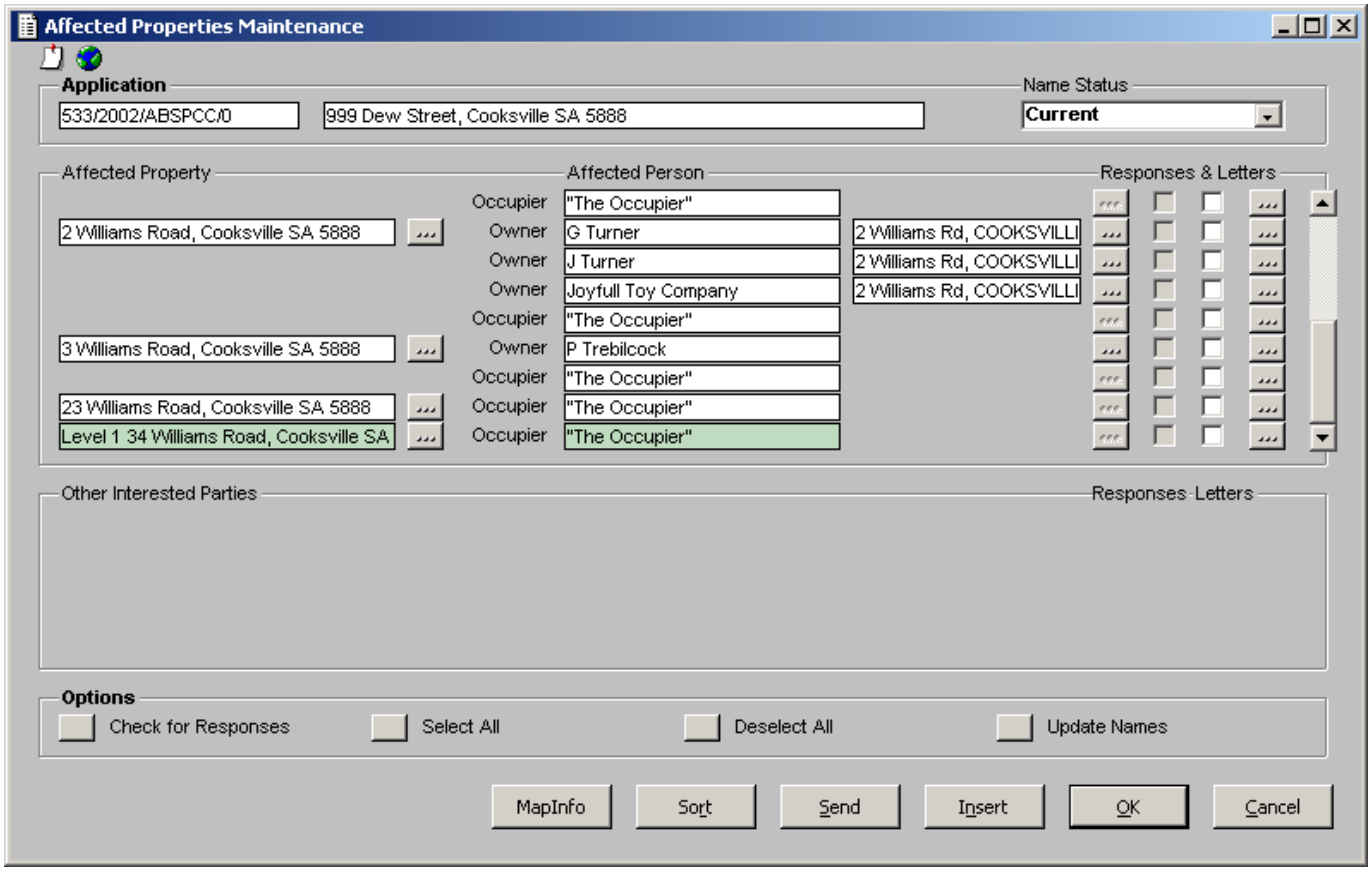
OWNER - ADD "THE OCCUPIER"



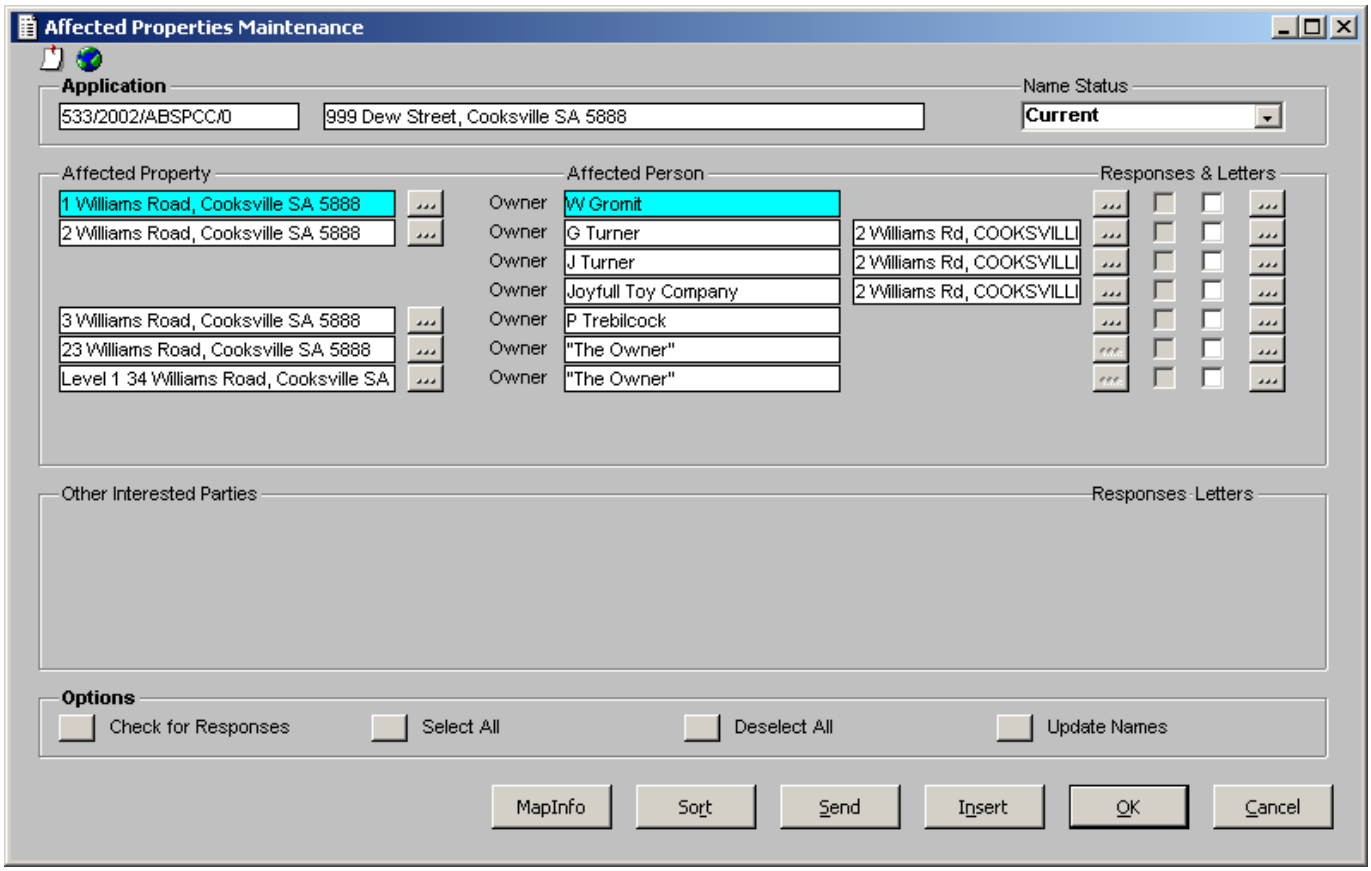
OWNER and "THE OCCUPIER"



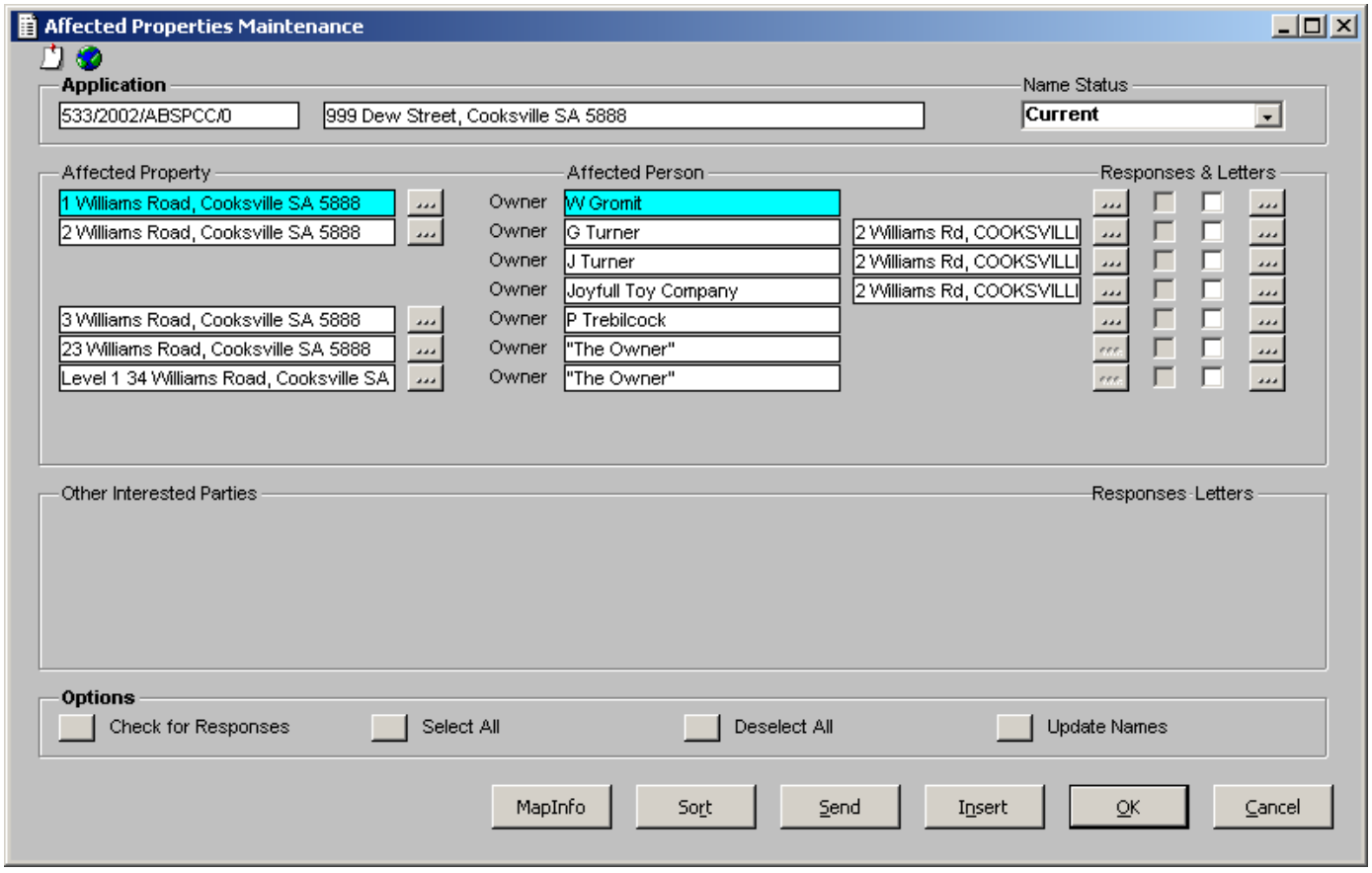
OWNER and "THE OCCUPIER" – ADD "THE OCCUPIER"



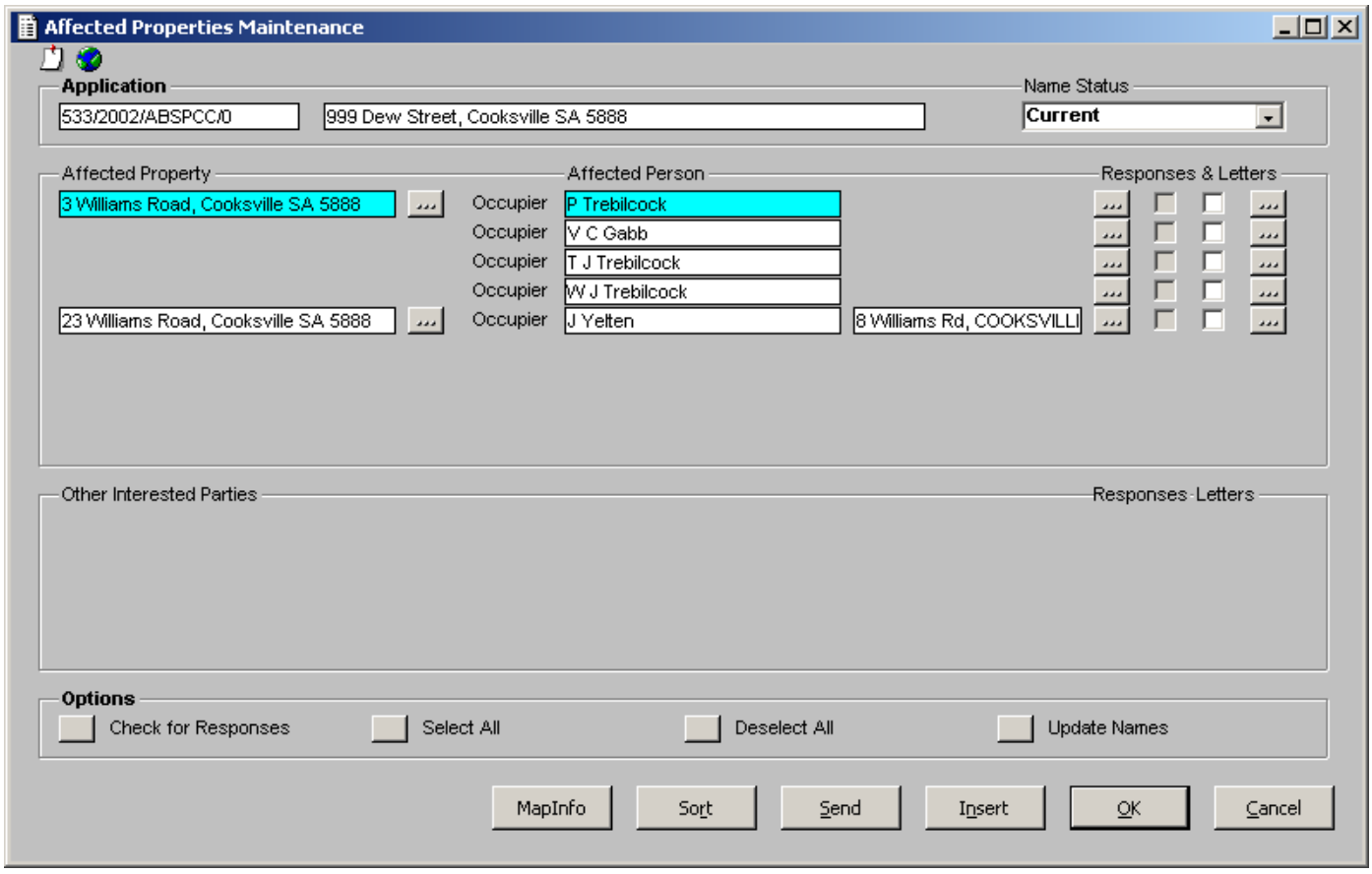
OWNER ONLY



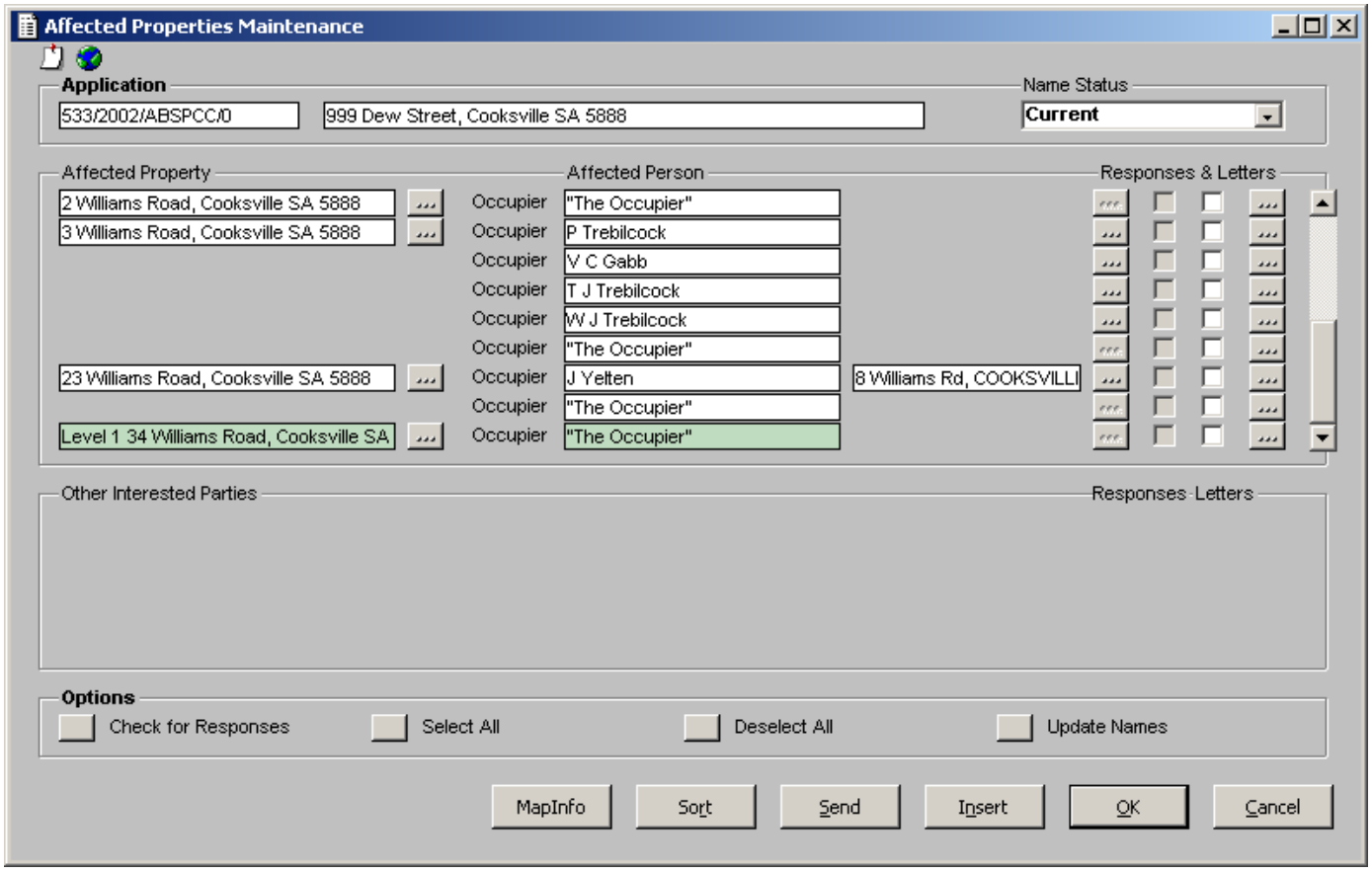
OWNER ONLY – ADD "THE OCCUPIER"



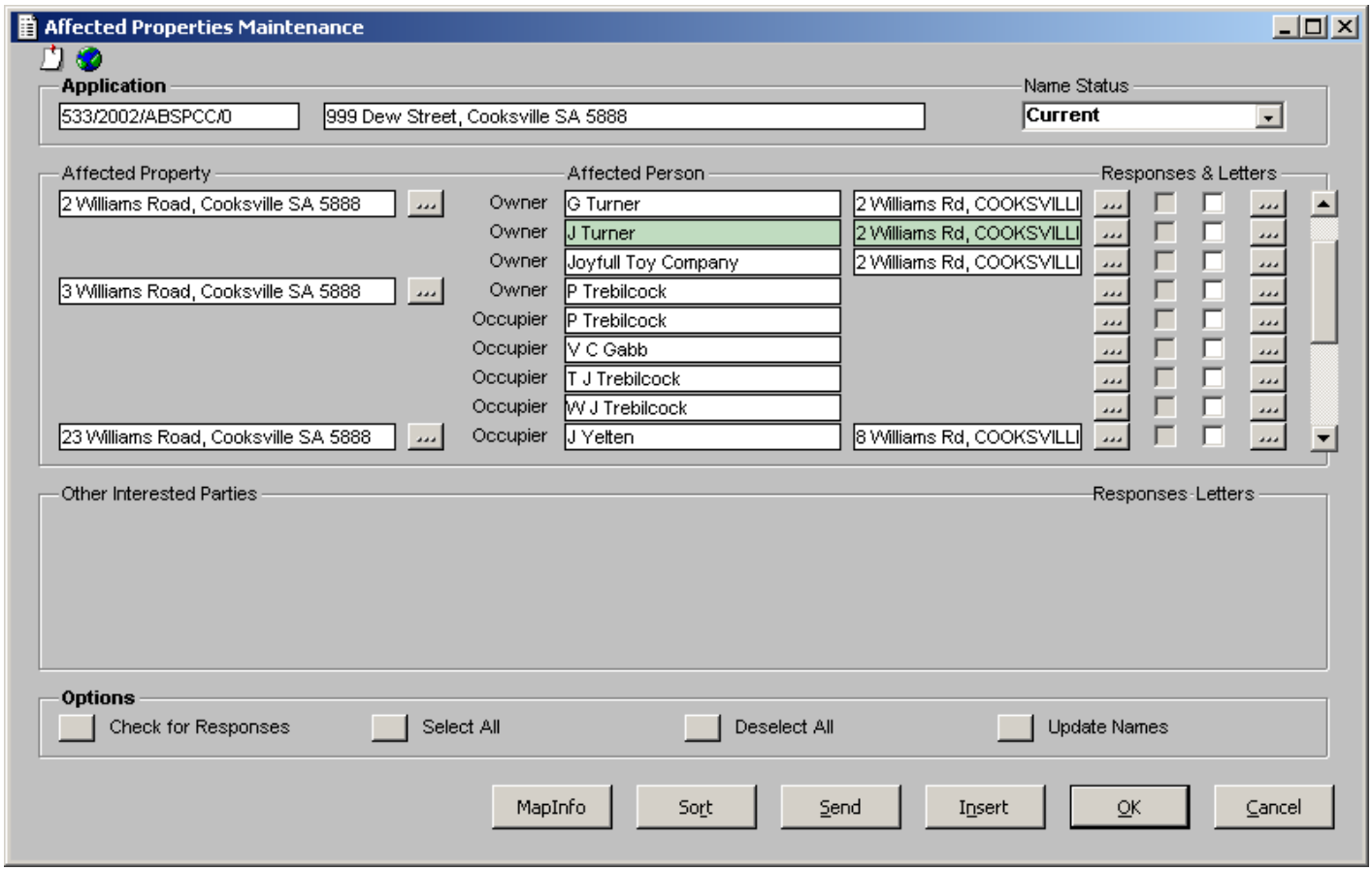
OCCUPIER



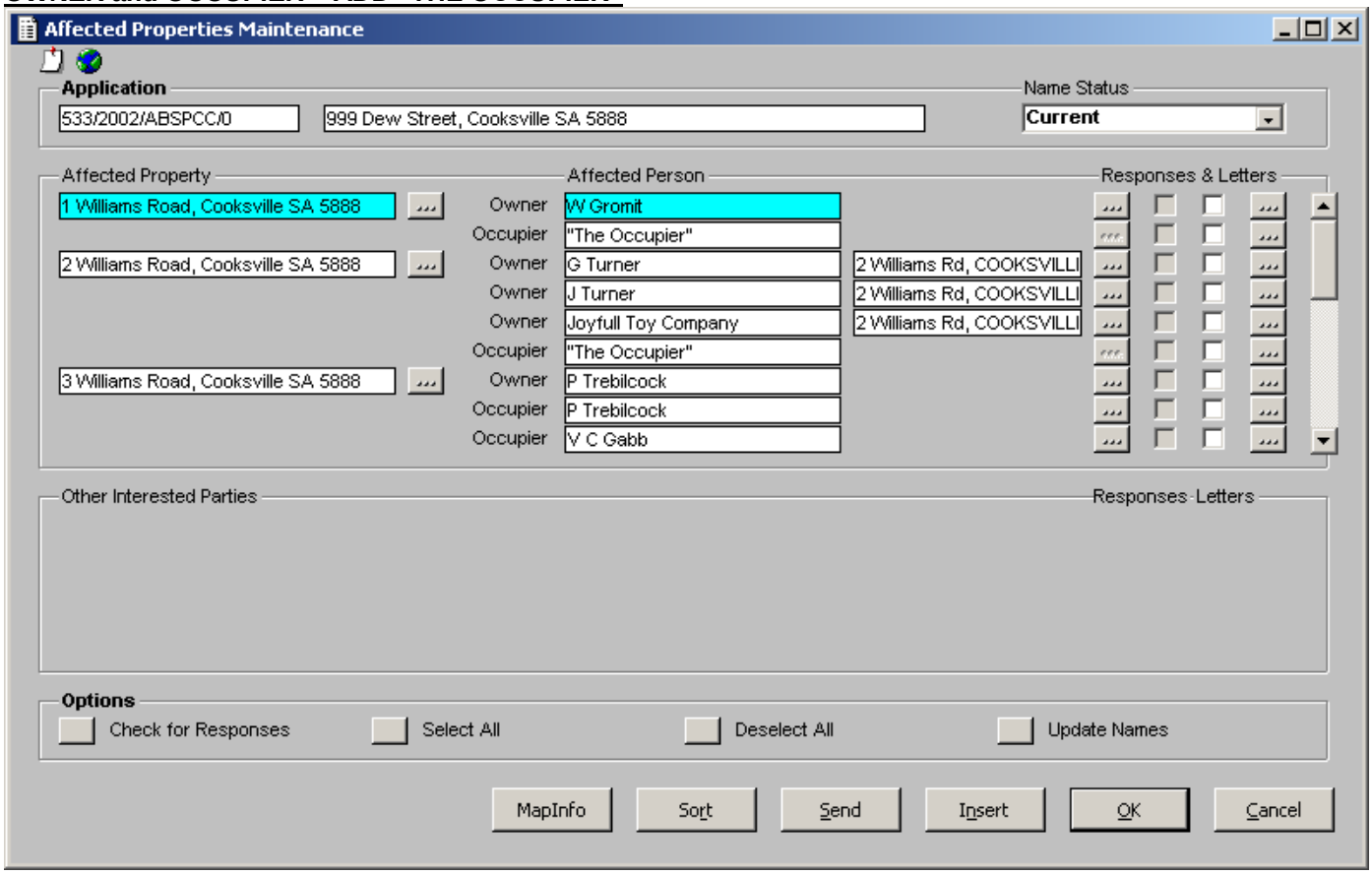
OCCUPIER – ADD "THE OCCUPIER"

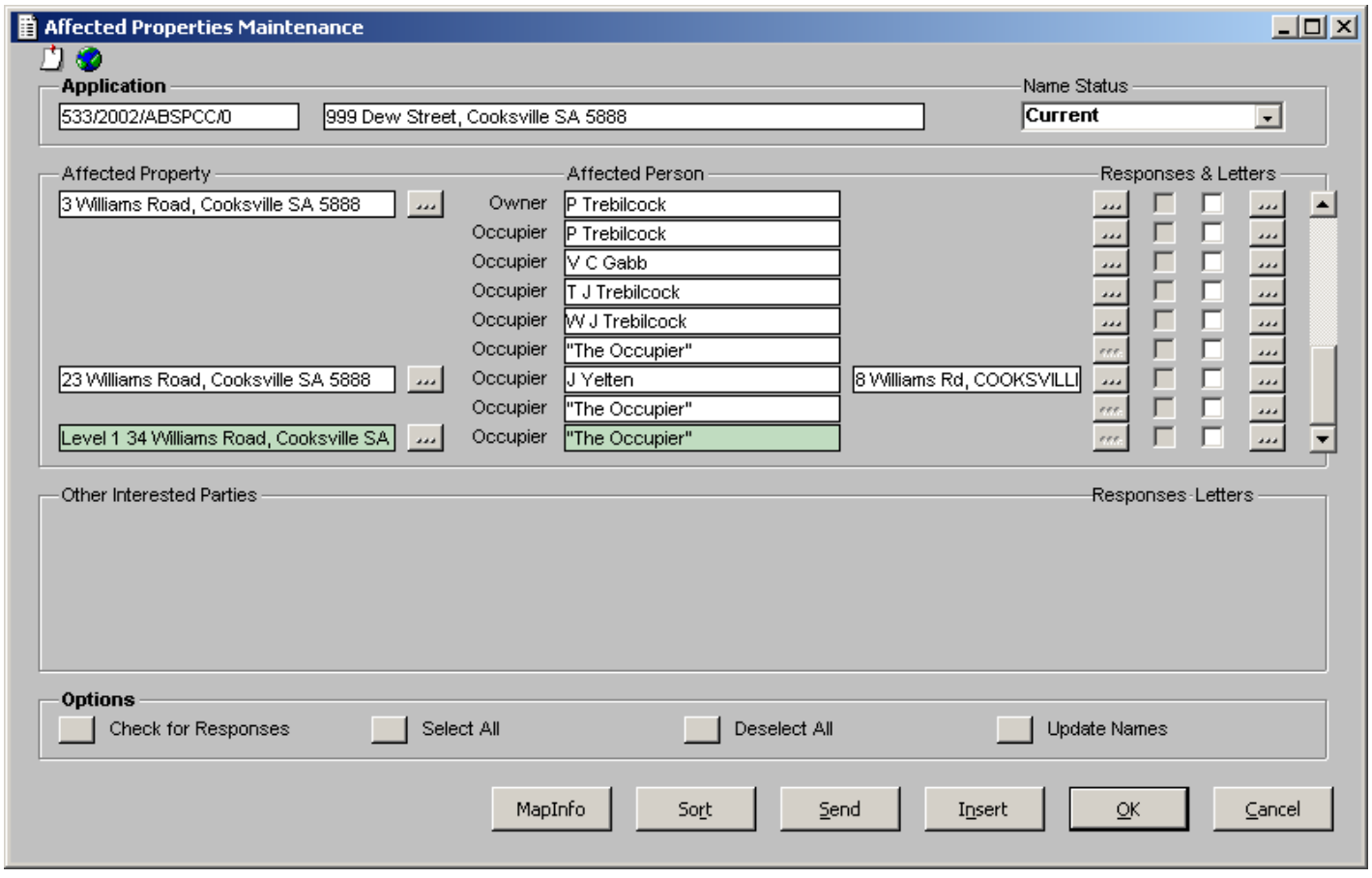


OWNER and OCCUPIER

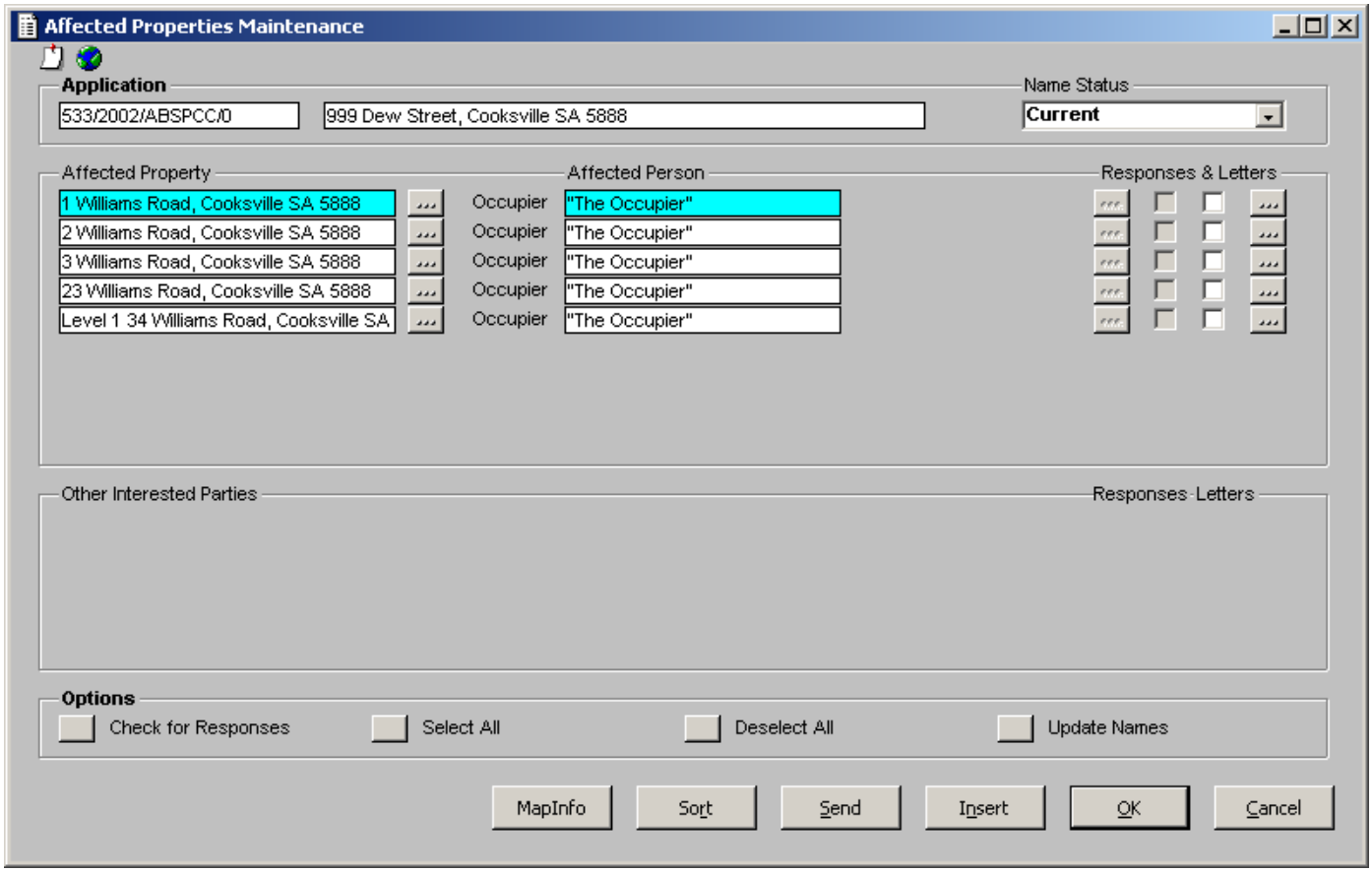


OWNER and OCCUPIER – ADD "THE OCCUPIER"

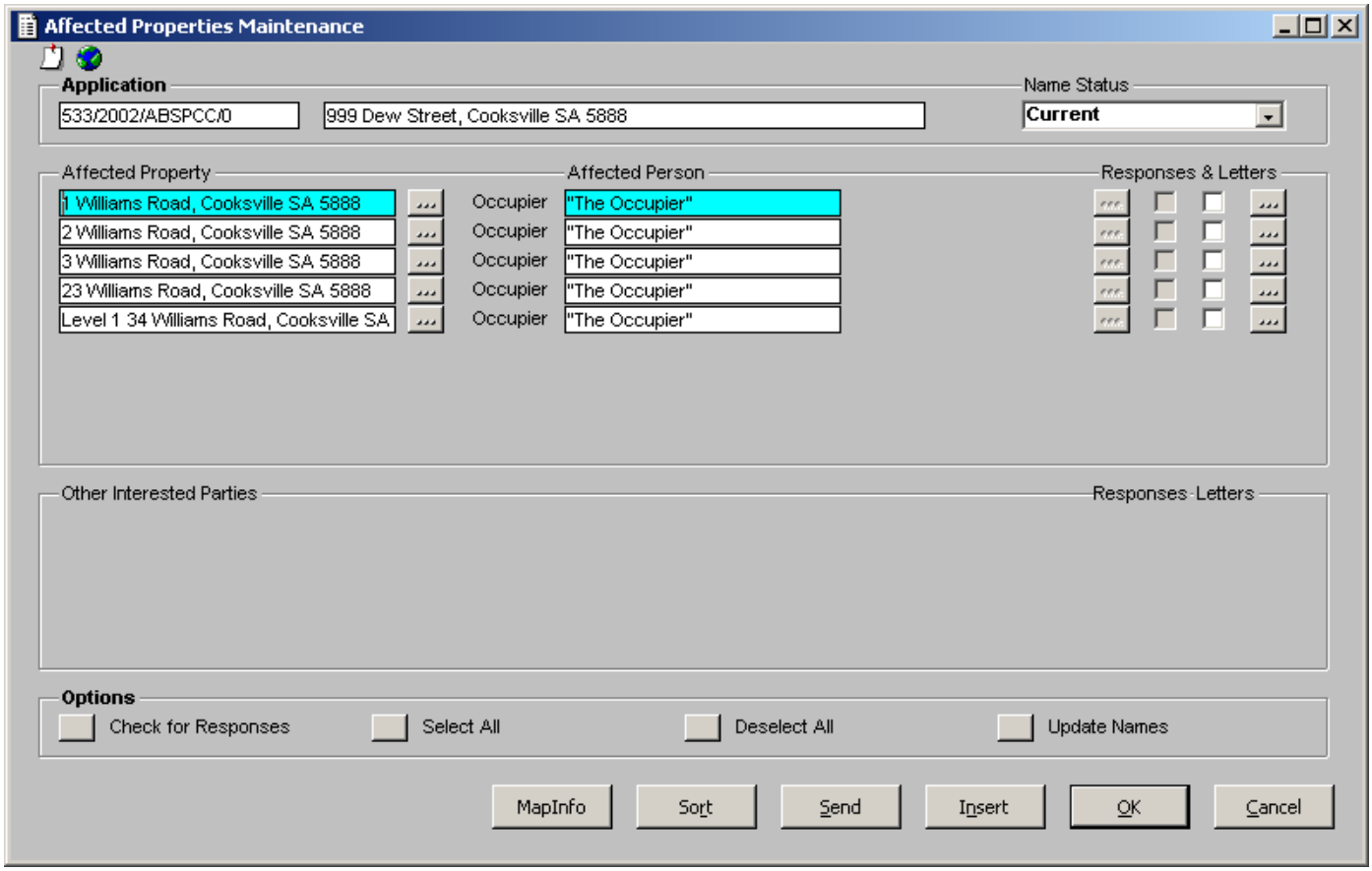




"THE OCCUPIER"

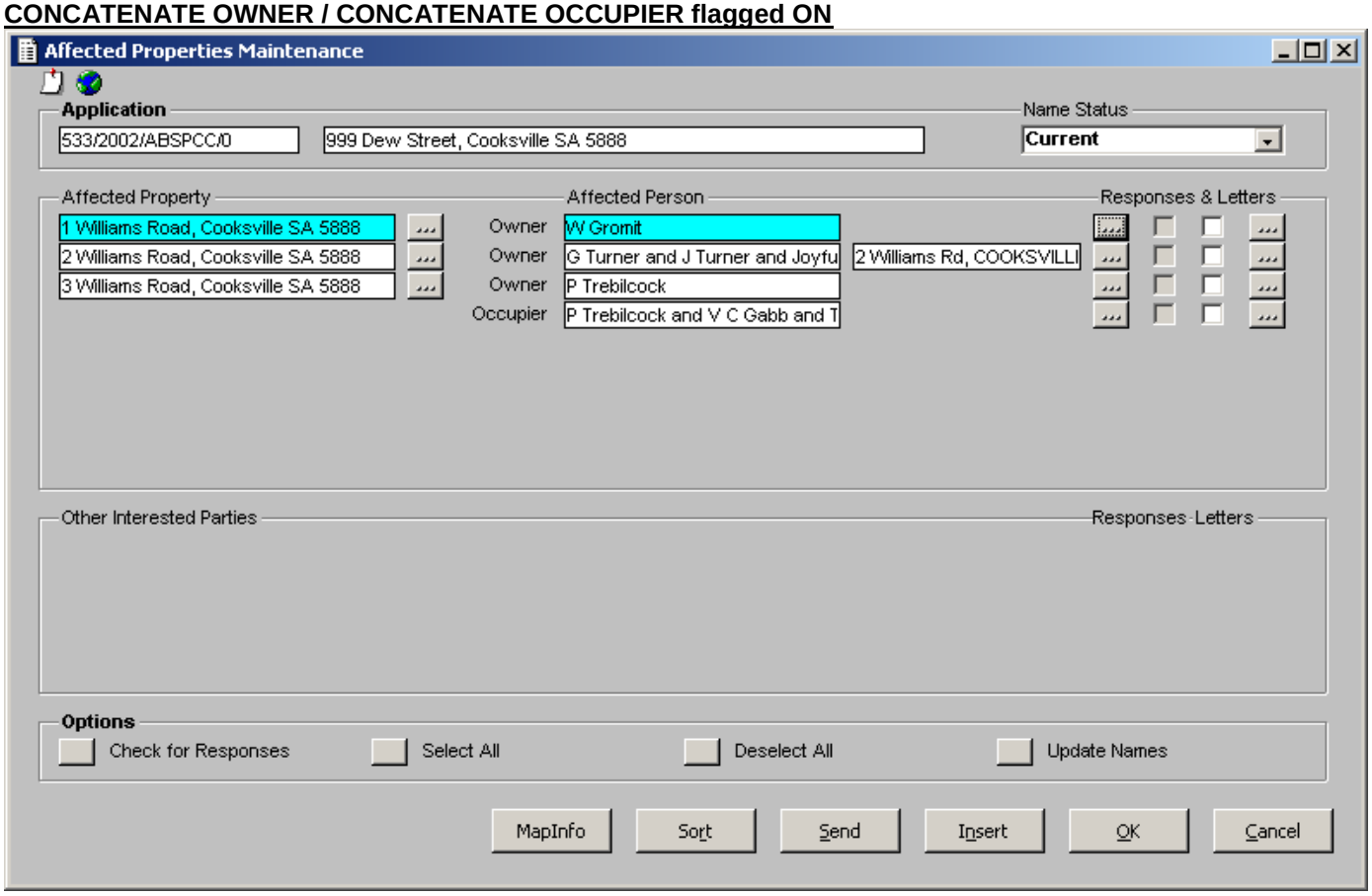


"THE OCCUPIER" – ADD "THE OCCUPIER"

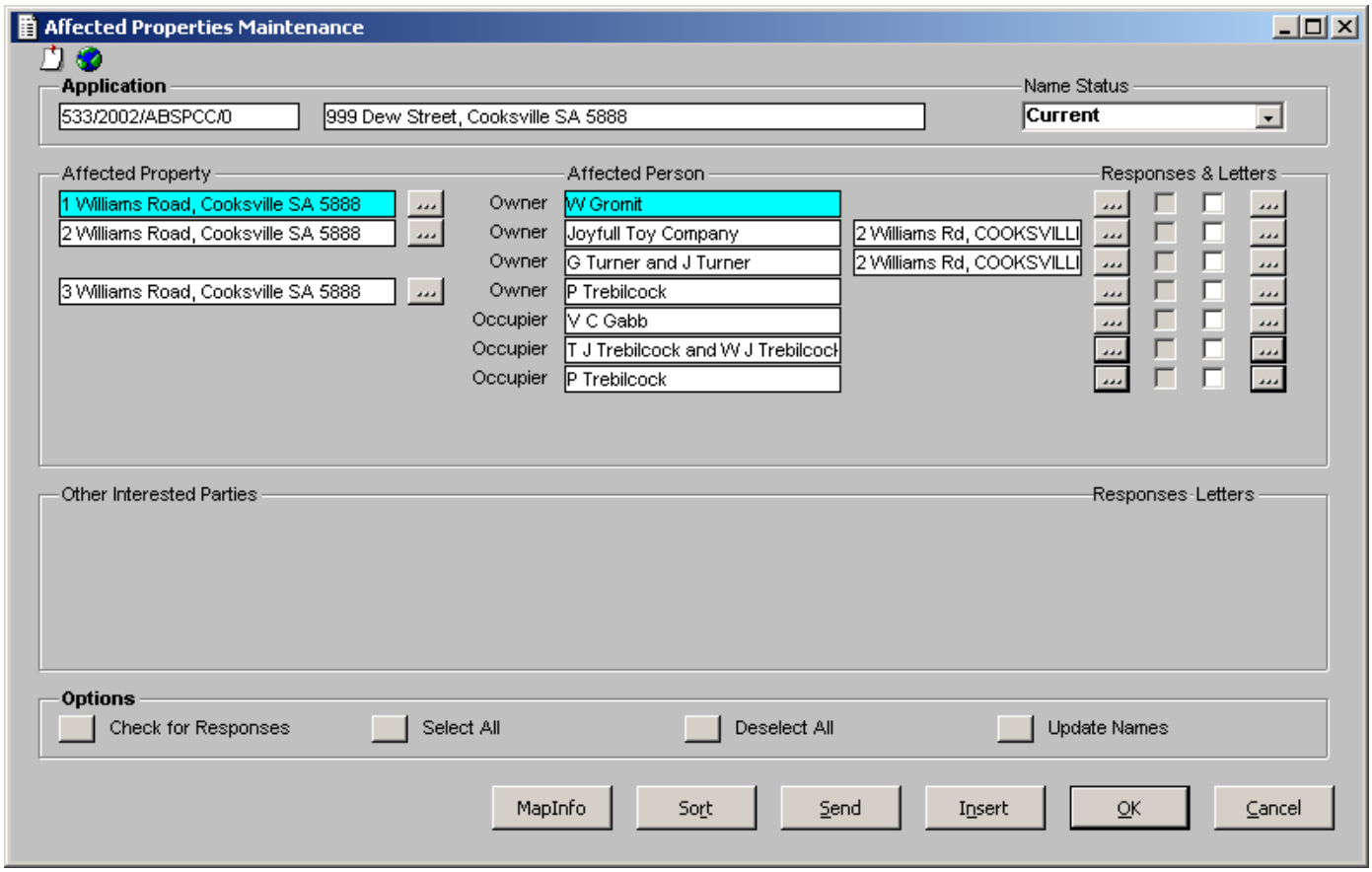


OWNER and OCCUPIER with

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

"The Occupier" – No Options

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.

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**	

"The Occupier" – Add "The Occupier"

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

The Names option enables names to be linked to applications via various Name Role Types. The following Role Types may be added to a Property. Not all Role Types may be available depending on what role types were nominated in parameter set up.

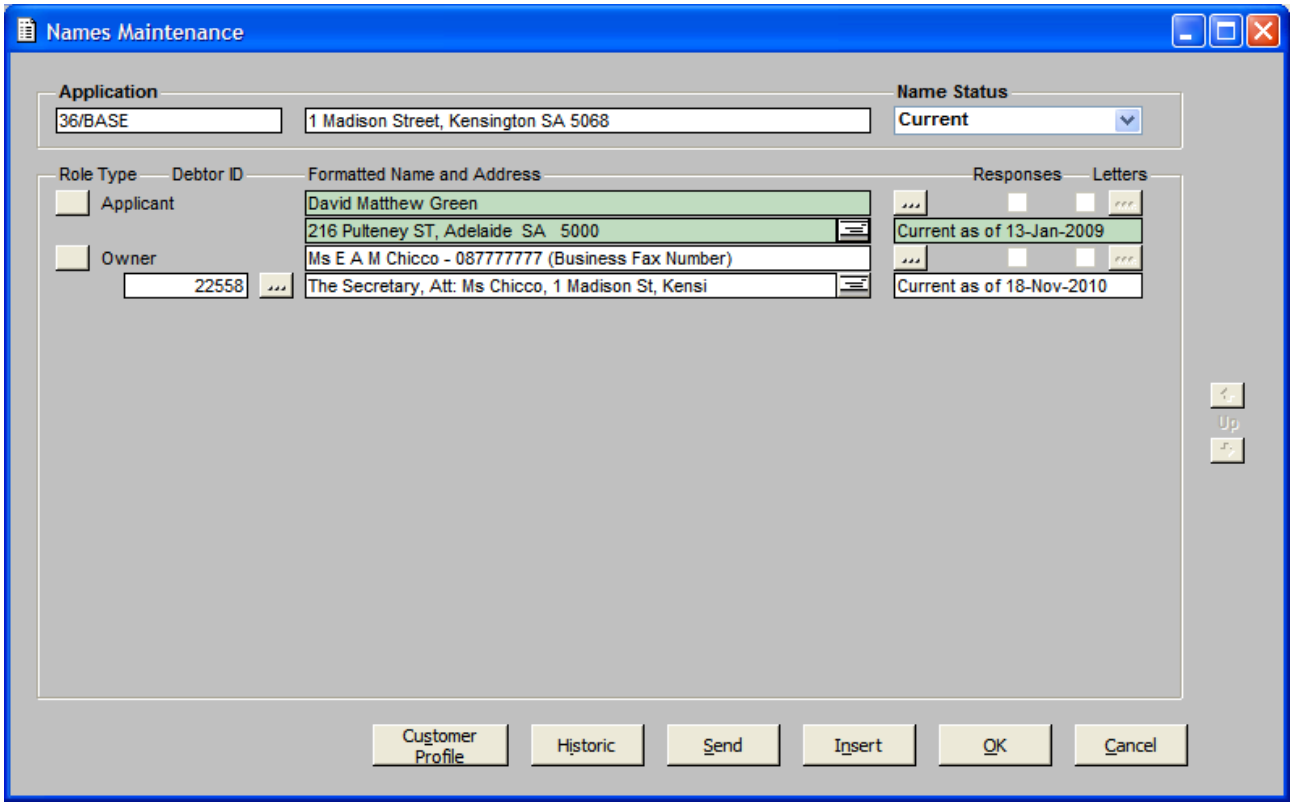
- Applicant
- Builder
- Architect
- Plumber
- Engineer
- Owner
- Private Certifier
- External Organisation
- Building Surveyor
- Contractor

Linking names to an Application may be performed by selecting an existing name or creating a new one via the Name and Address register.

Names Maintenance Form

The Name Maintenance Form provides the User with a selection of Role Types that may be associated with the Application. This form allows for the addition or deletion of names, with the ability to send acknowledgement letters and accept responses to these letters.

NOTE: When Pathway 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.



Names Maintenance Form

Application

The Application is made up of two fields one being the Application Numbering Code and the other the full description of the Application Location.

Name Status

Upon entry to the Name Maintenance form the Name Status defaults to 'Current'. Therefore the Names that are displayed are those that are the current name for the Application. The Name Status field can be change to either Historic or Current & Historic by using the dropdown on the field.

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 Application Class has been defined as using Pathway 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 Application 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 Application 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.

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.

Highlighting a Role Type will then enable a Letter to be created and if required a Response.

Clicking the 'envelope' button displays the Mailing Address Enquiry form.

View Name and Address

The View Names Detail button allows the User to detail out to the Name and Address module to view the details of the Name that is currently in focus.

Responses Received

The Responses Received checkbox informs the User that Responses have been recorded against a document that has been issued to the Name record. This Checkbox is updated with a Tick when a Response has been recorded otherwise the field will be blank.

Letters

The Letters Checkbox informs the User that document(s) have been sent to the Role record. If no documents have been issued to the Role record then the Checkbox will be blank. The Detail Button allows the User to detail out and see the details of the documents that have been issued. If no documents have been issued for the Role record then the Detail Button is dimmed and not available for selection.

Role Status Date

The date displayed shows whether the role information is current or historic e.g. Current Date is displayed as 'Current as of 22-Dec-1998' or Historic Date is displayed as '18-Jan-1999 To 22-Jan-1999'

Customer Profile Button

The Customer Profile Button is only displayed when the Application Class has been defined as using Pathway 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.

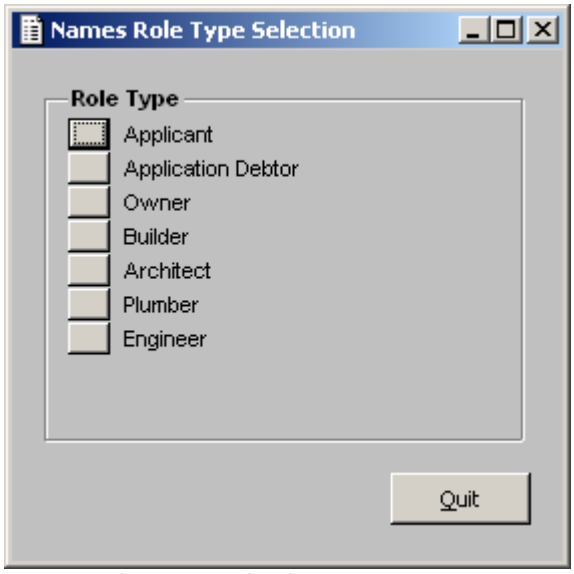
Historic Button

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 Application 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 pre-defined Role Types the required Name Role Type to be included in the selection or maintenance.



Name Role Type Selection Form

Role Type
The Form displays a list of pre-defined Role Types that allows for the selection of the type of Name Role that is required to be inserted into the Name Maintenance form. The User may then select an existing Name from the list, or create a new one.

Consents

The Consents maintenance function allows for the creation, maintenance and deletion of Consents. Details such as the consent type and description, lodgement date, consent expiry date and responsible officer(s) can be recorded on the consent.x
The consent expiry date is updated automatically by the system when an approval decision is applied to the consent.
A Consent may be added to an Application to allow certain sections of the Application to proceed prior to final Approval on the whole Application.

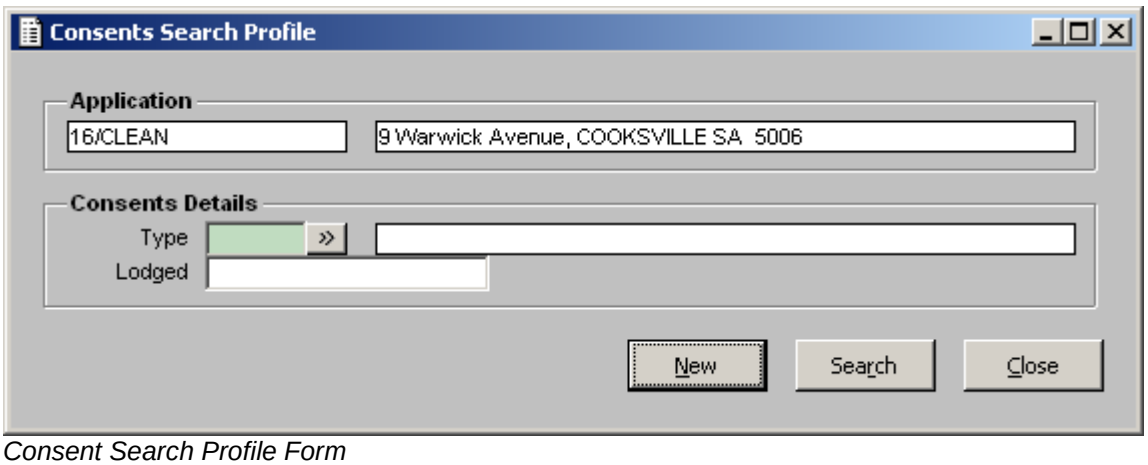
Consent Decisions.
For APPROVAL Decisions the Consent Expiry Date will update the expiry date to the latest date ie.
The expiry date will only increase.
A rejection decision will clear the Consent Expiry Date.
A Deleted decision will give the warning message:
“The Application Expiry Date and Status will need to be manually updated”
The User must then update Consent Expiry Date and Status.
The Application Expiry Date and Status will be updated by the Consent only if no Application Decision has been made.

Expiry Decision Rules
As Users are aware Decisions can be attached to both Applications and Consents.
Expiry Date and Status are only updated when a NEW Decision is added.

Application Decisions
Will update the Application Status and Expiry Date.
For APPROVAL Decisions the Application Expiry Date will update to the latest date ie. The expiry date will only increase.
Rejected decisions clear the Application expiry date.
A Deleted decision will give the warning message:
“The Application Expiry Date and Status will need to be manually updated”
The User must then update the Application Expiry Date and Status.
Consent Decisions will have no effect on the Application Expiry Date and Status once an Application decision has been made.

Consent Search Profile Form

The Consent Search Profile enables the User to either Search on existing Consent Codes, or click the New Button to create a new Consent Code.



Consent Search Profile Form

Application

This field details the Application Number and actual Location of the Application.

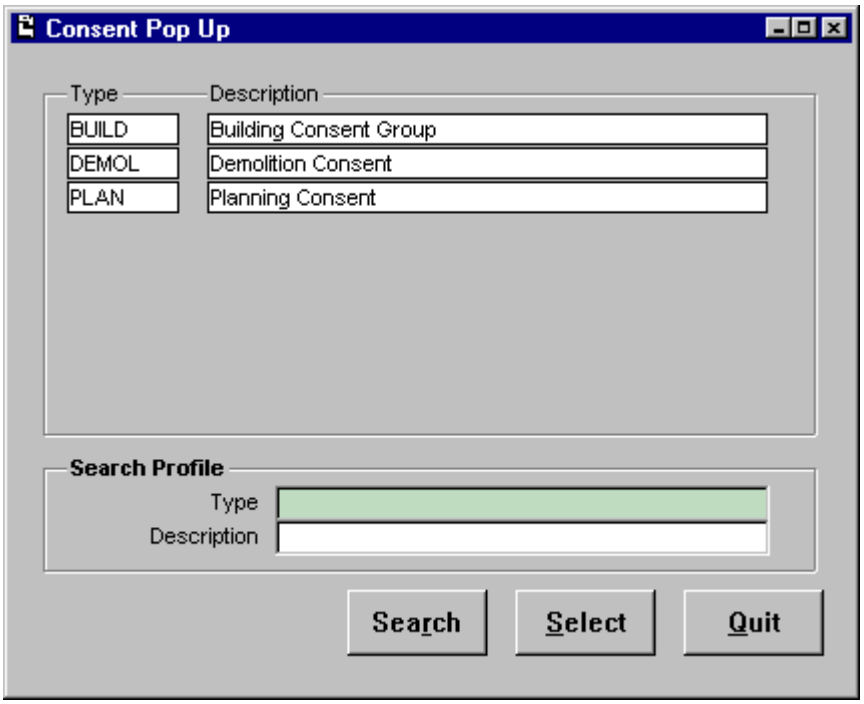
Consent Details - Type

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.

Consent 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 form displays the predefined Consent Types.

Description

The full Description of the Consent Type is displayed in this field.

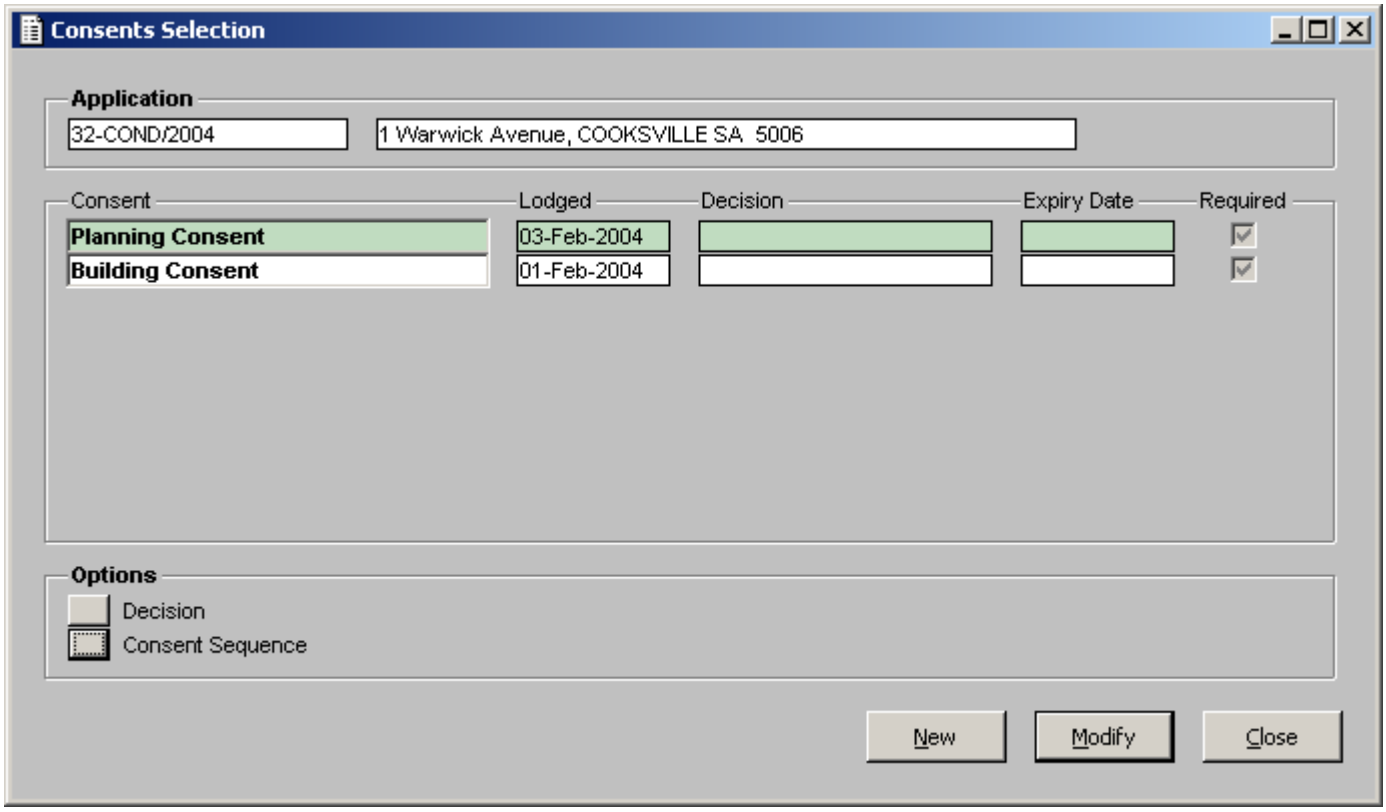
Search Profile - Type

The Search Profile form enables data to be entered into the Type option and click the Search Button to find the required Consent Type.

Search Profile - Description

The Search Profile form enables the User to enter a Description in the Search Profile Description field. Click the Search button after entering a Description to commence the Search.

Consent Selection Maintenance Form



Consent Selection Maintenance Form

Application
This field details the Application Number and actual Location of the Application.

Consent
This field details the Consent Code Type.

Lodged
This field details the date that the Application was lodged.

Decision
This field details the actual Decision placed on the Consent.

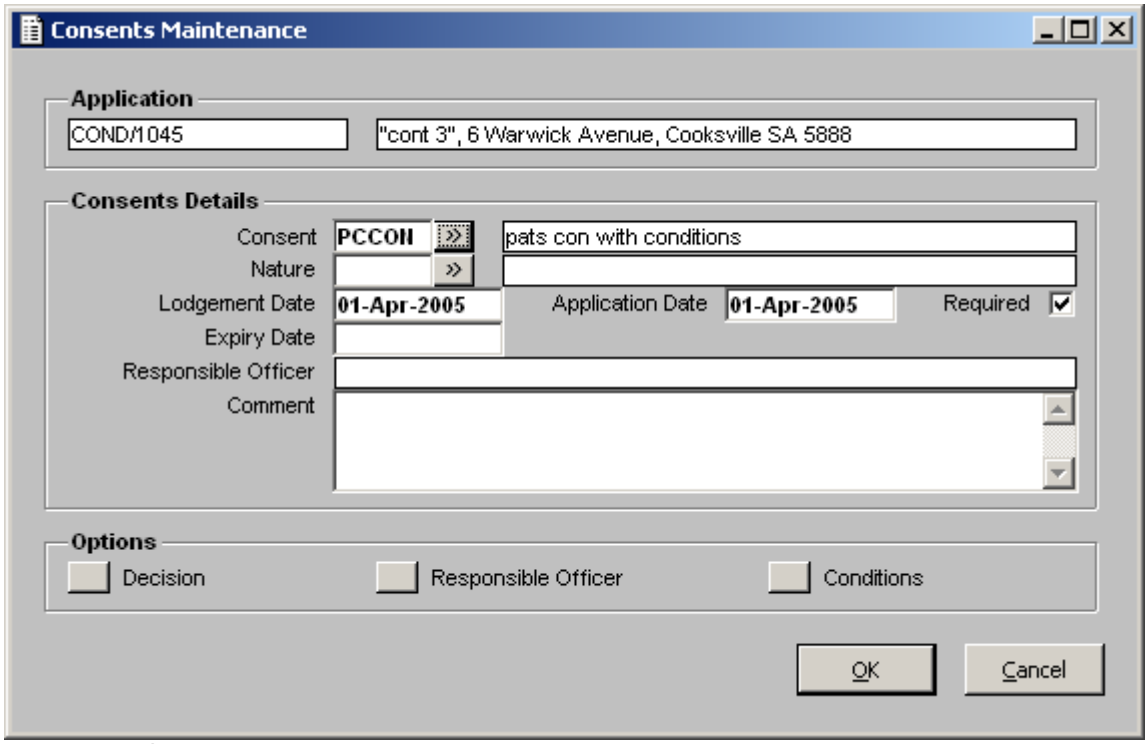
Expiry Date
This field details the Expiry Date of the Consent.

Required
The Required field may be selected and checked if the User wishes to ensure that a particular Consent Type is required on an Application before it may proceed.

Options - Decision
Selecting the Decision Option will display any Decisions that have been entered against the Consent or allow entry of a Decision.

Options – Consent Sequence
Selecting the Consent Sequence Option displays the Consents and allows them to be resequenced.

Consent Maintenance Form



Consent Maintenance Form

Application

This field details the Application Number and actual Location of the Application.

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 Application.

Consent Details - Application Date

This field details the actual date of the Application received.

Consent Details – Expiry Date

This field contains the date that the consent will expire.

Consent Details - Required

This field if checked on and there is no Approved Decision against the Consent will prompt an 'Outstanding' message when the same Location is used to lodge a new Application.
If the field is checked off no 'Outstanding' message will be displayed at lodgement.

Consent Details - Expiry Date

This field details the Expiry Date of the Consent. The Expiry Date will automatically populate when an Approved Decision is attached.

Consent Details Responsible Officer

This field details the Responsible Officer(s) for the Consent. Adding or changing Responsible Officer(s) can be done by using the Options – Responsible Office Button

Consent Details – Comment

This field allows the User to enter a comment on this particular Consent.

Options - Decisions

This button allows the User to detail out to the Decision form. This allows the User to enter Decisions against Consents.

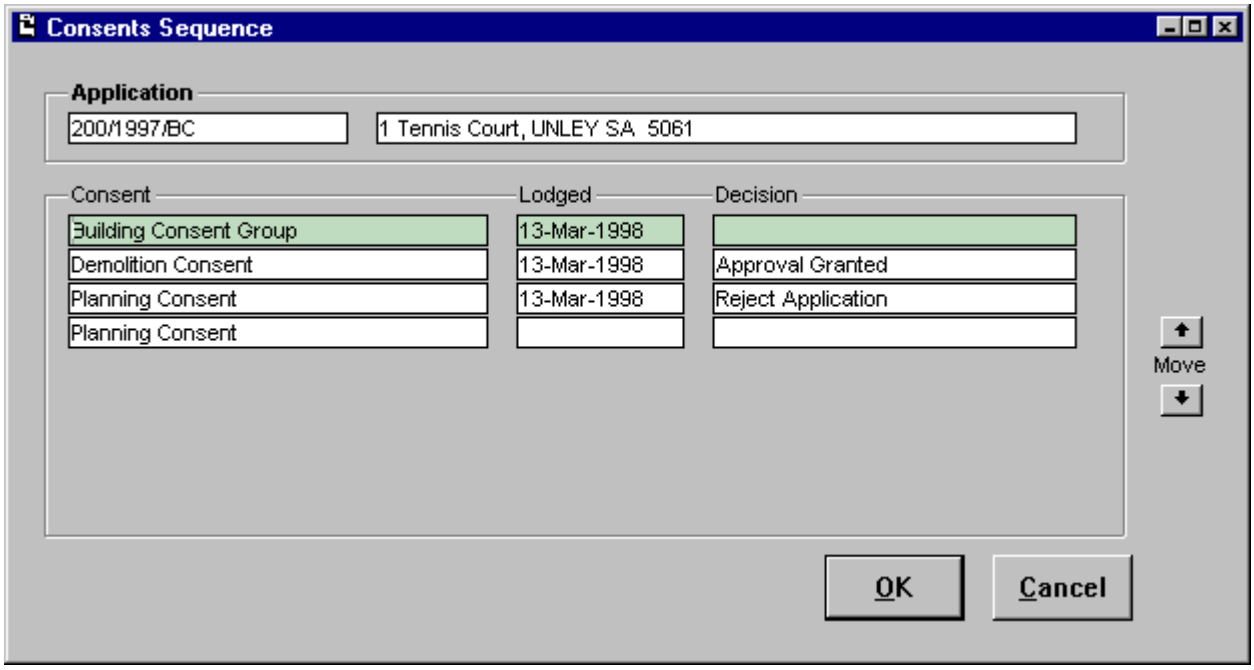
Options – Responsible Officer
This button allows the User to detail out to the Responsible Officer form. This allows the User to enter Responsible Officers against the Consents.

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 Application Maintenance, in Application Entry, Change Application Type or inserting a new Fee, the assigned Condition will be loaded onto the Application. 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 Sequence Form

The Consent Sequence Form may be selected from the Consent Selection Form. Consents may be selected and their position shifted.



Consent Sequence Form

Application
This field details the Application Number and actual Location of the Application.

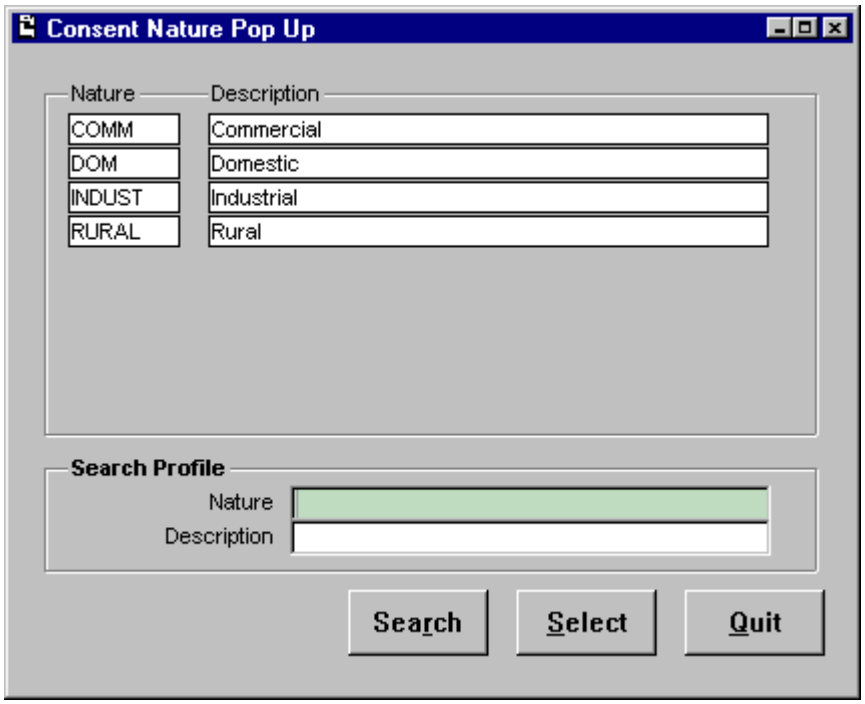
Consent
This field details the actual Consent Type.

Lodged
This field details the date the Application 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.

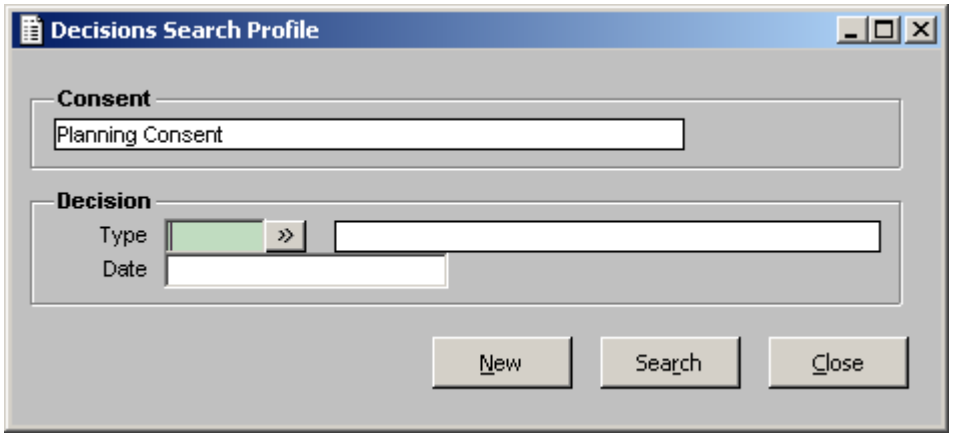
Description
This field gives a full Description of the Consent Nature.

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 another Search criteria to enable the User to find a Consent Nature.

Consent Decisions Form

Consent Decisions may be added to the Consent to verify if the Consent is Granted or Denied.



Consent Decisions Form

Consent

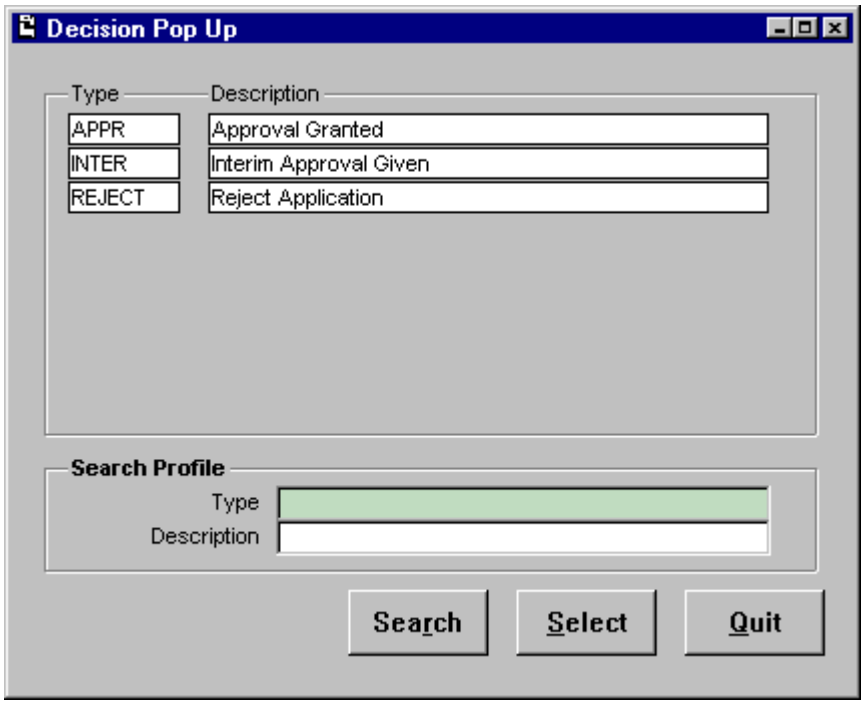
This field details the Consent that the Decision will be based upon.

Decision - Type
This field may be used to enter a Decision Type to Search for.

Decision – Type Description
This is the decription of the Decision Code.

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

Decision Type Pop Up Form



Decision Type Pop Up Form

Type
This field details the Code given to the Decision Type.

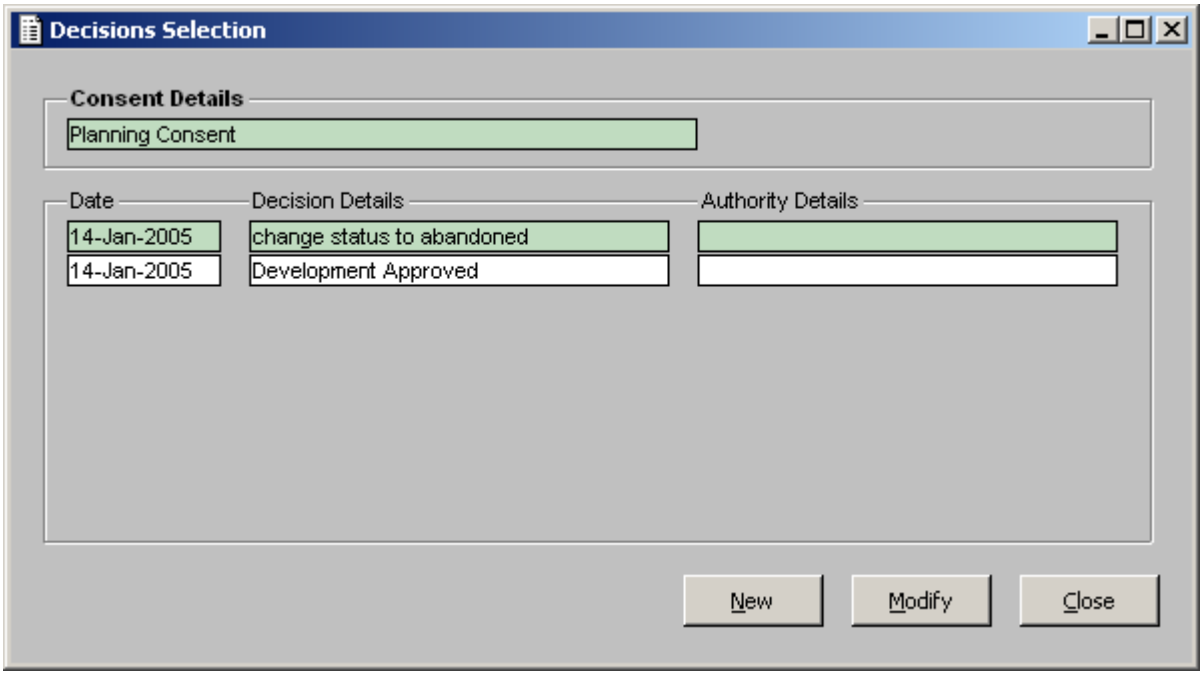
Description
This field gives a full Description of the Code.

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.

Consent Decisions Selection Form

If the Search Option has been taken on the Consnet Decisions Form and there is more than one Decision against the Consent then the Consent Decisions Selection Form is displayed to allow selection of the correct Decision. A new Decision can also be started from this form.



Consent Decisions Selection Form

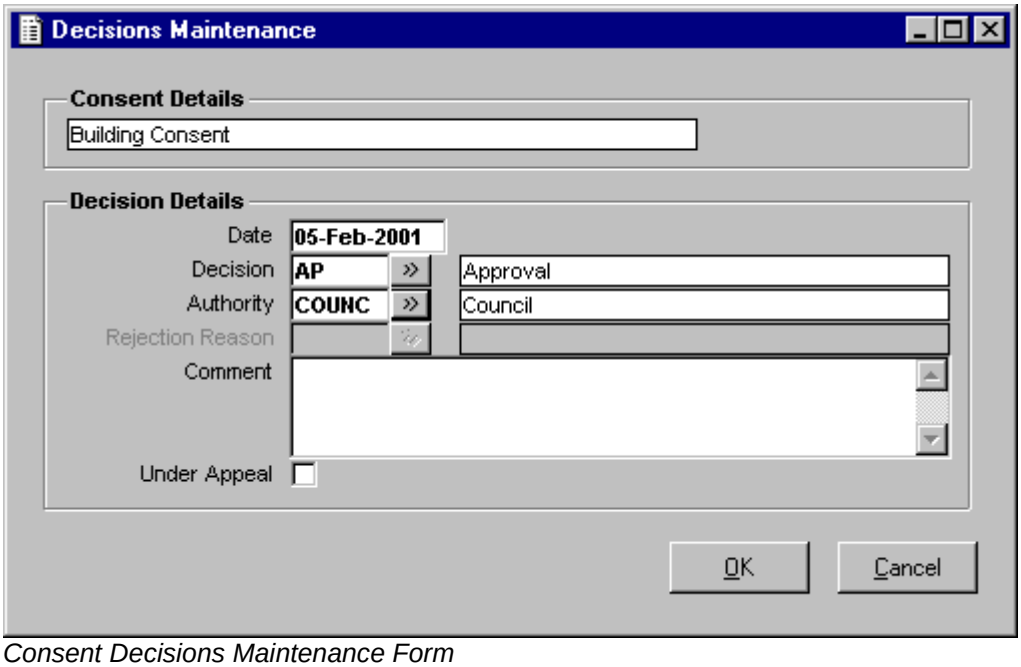
Consent Details
This field details the Consent that the Decision is based upon.

Date
This field displays the Date of the Decision.

Decision Details
This field displays the Description of the Type of Decision.

Authority Details
This field displays the Authority Description associated to the Decision.

Consent Decisions Maintenance Form



Consent 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 to displays the Calendar function or entering in the required date.

Decision Details - Decision
This field allows the User to enter a Decision Code, or click the Pop Up Button to select a pre-defined Code.

Decision Details - Authority
This field allows the User to enter a Authority Code, or click the Pop Up Button to select a pre-defined Code.

Decision Details - Rejection Reason
This field allows the User to enter a Rejection Code, or click the Pop Up Button to select a pre-defined Code.

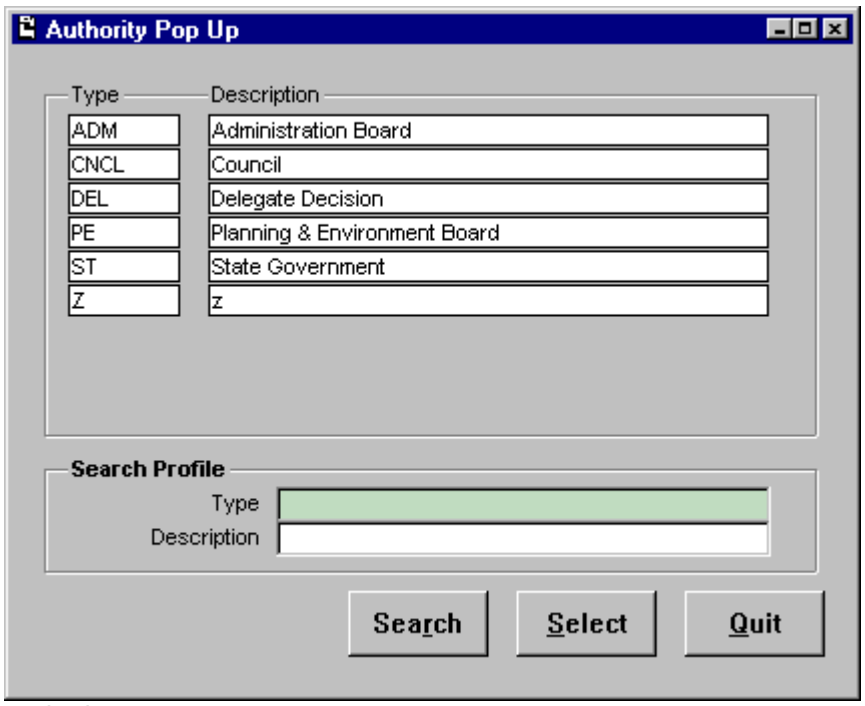
Decision Details - Comment
This free format field allows the User to enter a comment on the Specific Decision being entered.

Decision Details - Under Appeal
If this field is checked, then the Decisions is being Appealed. If the field is unchecked no Appeal is pending.

If the Under Appeal Status has been defined for the Decision within the Decision Parameters and the Under Appeal checkbox is checked on then the Application will be updated to the Under Appeal Status. If no Under Appeal Status has been defined for the Decision then the Application will be updated with the Status of the Decision.

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

Authority Pop Up Form



Authority Pop Up Form

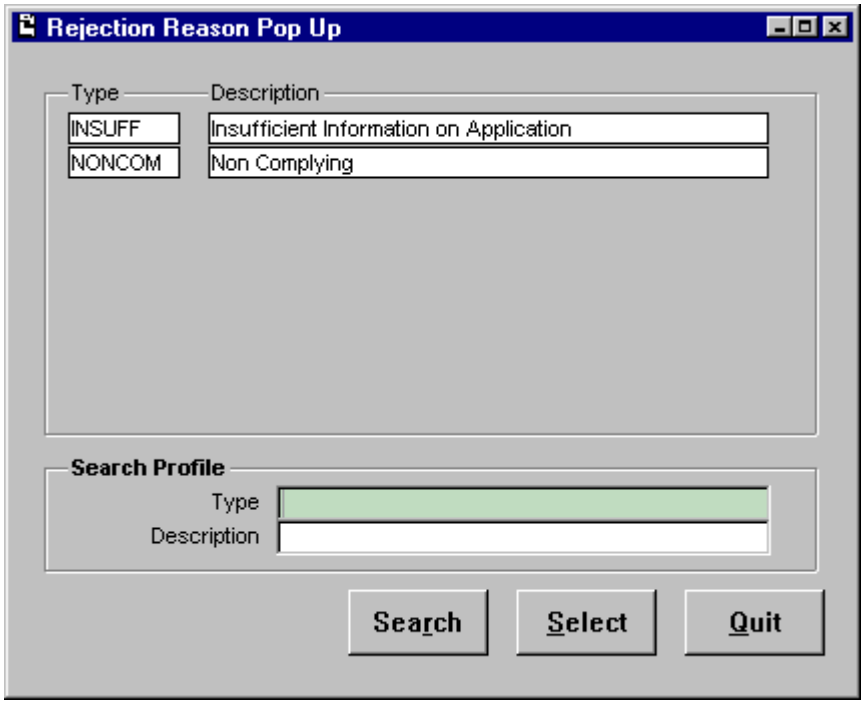
Type
This field details the Code given to the Authority Type.

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 Pop Up Form



Rejection Pop Up Form

Type
This field details the Code given to the Decision Type.

Description
This field gives a full Description of the Code.

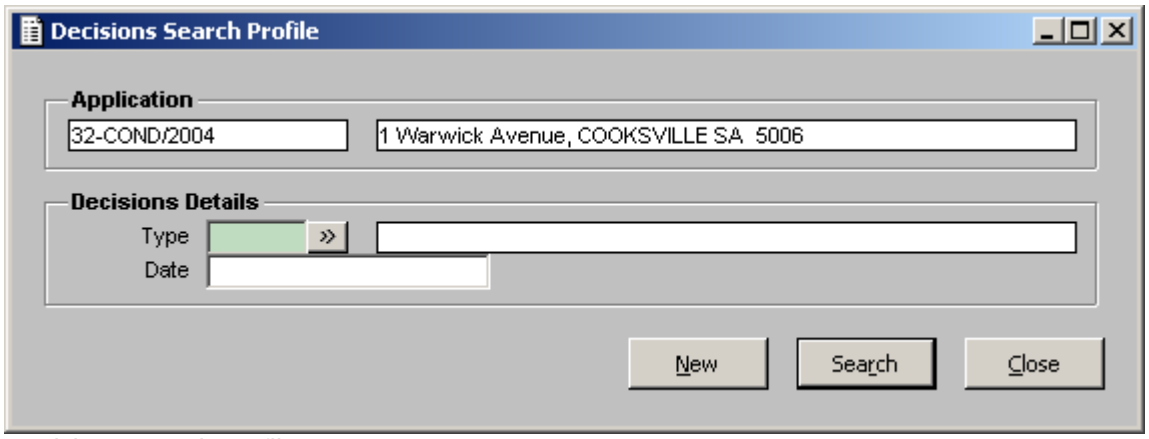
Search Profile - Type
The Type field may be used to enter a Type then click the Search Button to produce the result.

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.

Decisions

Decisions Search Profile Form

The Decision Search Profile Form may be used to Search for a Decision that can be placed against the Application itself. This form allows the User to Search for an existing Decision, or create a new Decision.



Decisions Search Profile Form

Application

The Application Field details the actual Application that you wish to assign a Decision to and its Primary Location.

Decision Details – Decision 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.

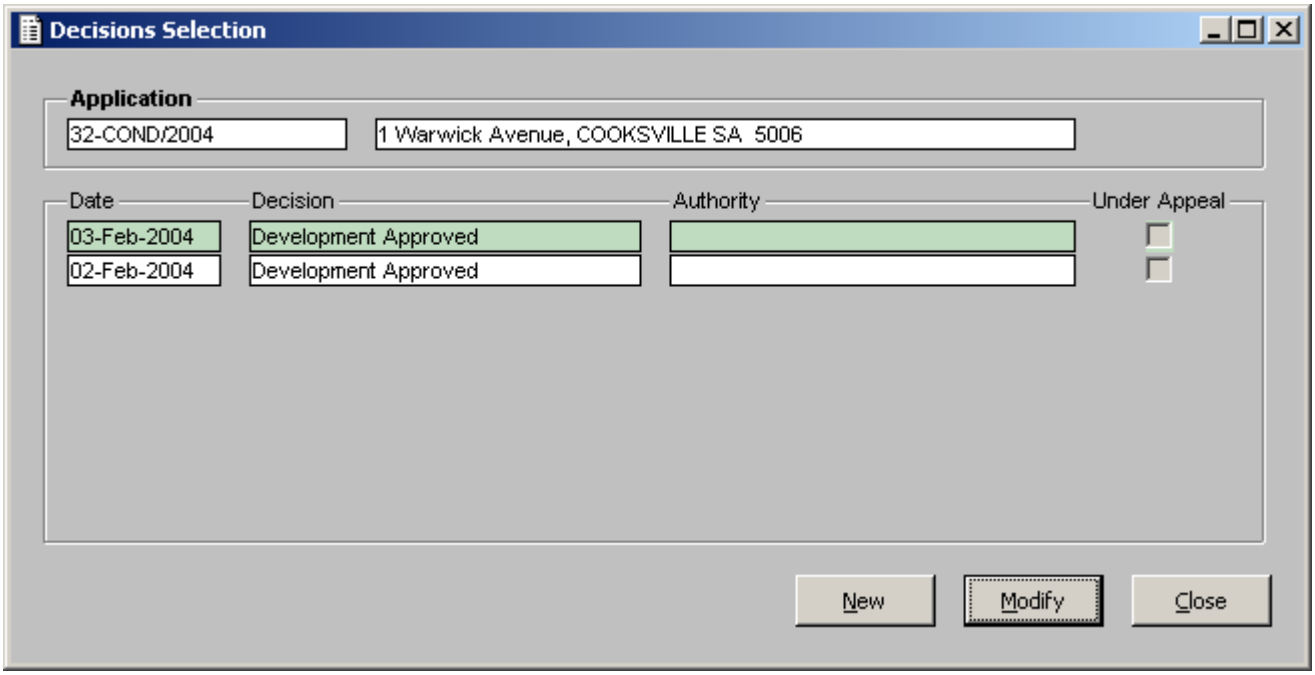
Decision Details - Date

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 the New button may be selected to add a new Decision to the Application.

Decision Selection Form

The Decision Selection Form lists any Decisions that have been entered on an Application.



Decision Selection Form

Application
The Application Field details the Application Number and its Locations that the Decisions are assigned to.

Date
This field displays the date that the Decision was granted on the Application.

Decision
This field details the actual Description of the Decision assigned to the Application.

Authority
This field details the Authority Description of the person or body that assigned the Decision to the Application.

Under Appeal
This field details the Authority Description of the person or body that assigned the Decision to the Application.

The User may also click the New button to add a New Button from here.

Decisions Maintenance Form

The Decisions Maintenance Form allows the User to maintain an existing Decision, either adding addition information to an existing Decision or modifying it.

NOTE: - Where EDALA fields have been setup for the Decision and the Application that the Decision is being added to has been created via the EDALA Take Up process, then three additional field can be displayed. These being 'Respond to Referral', 'Notify Decision' and 'Final Approval' depending on the settings for the Decision itself.

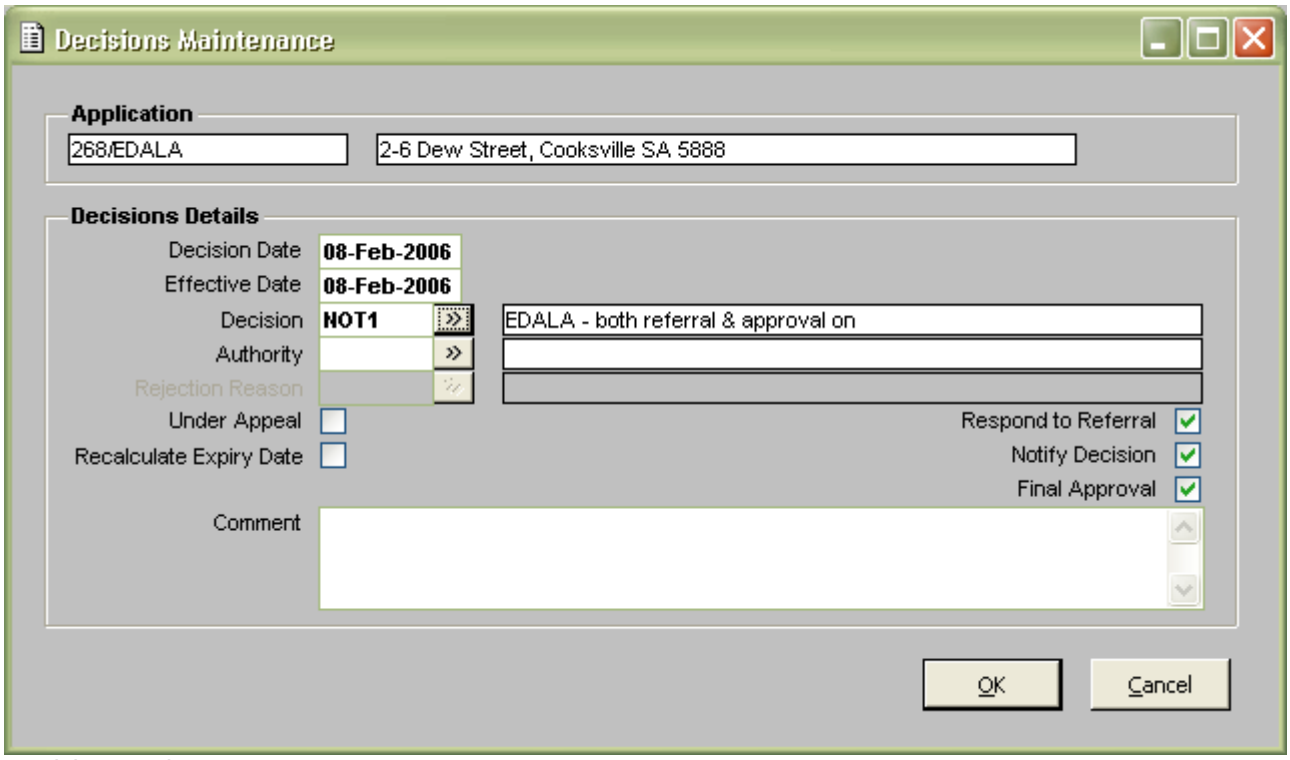
This information is then displayed on the Application Data Maintenance display and used in the EDALA Export process.

NOTE – Where the PPARS flag has been set on for an application the Decision that that is being added to the Application will have two extra fields that require entry. They are:

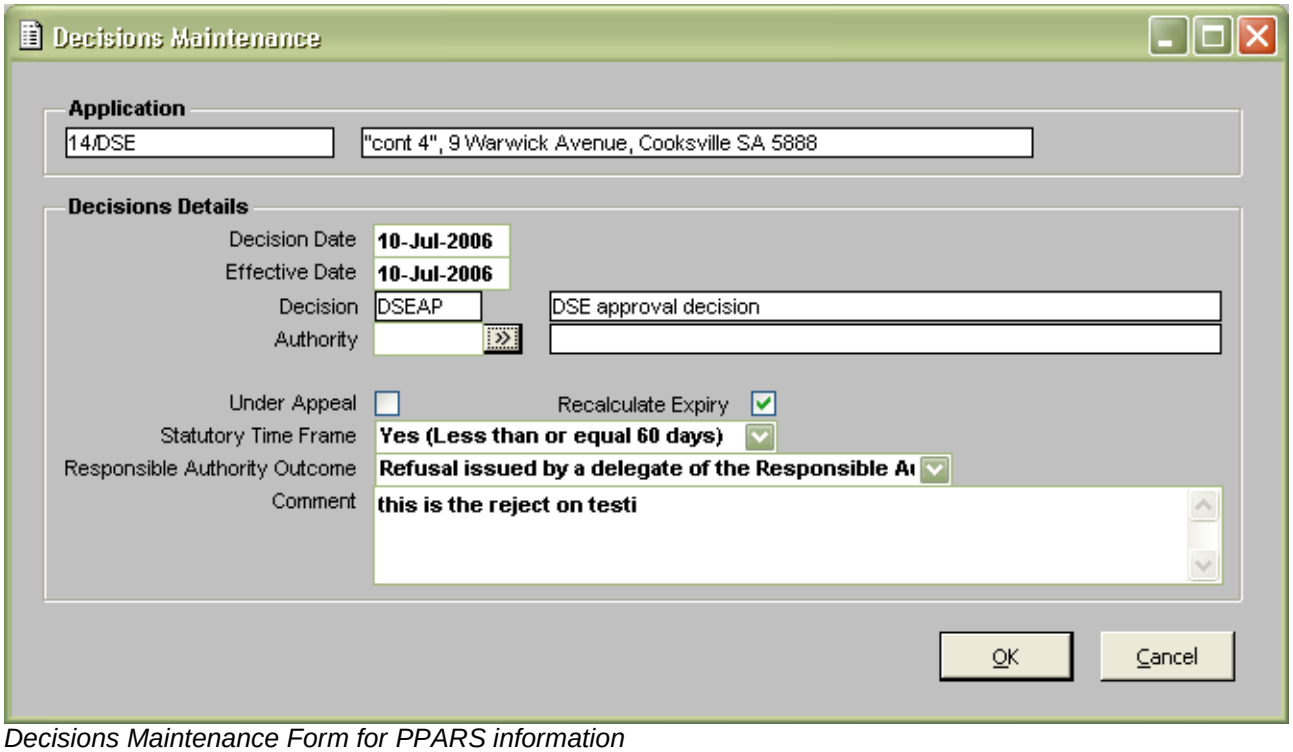
Statutory Time Frame which has 3 options to choose from:

Not Yet Determined
No (Greater than 60 days)
Yes (less than or equal to 60 Days.

Responsible Authority Outcome which has 9 options to choose from:
Permit is issued by a delegate of the Responsible Authority
Permit is issued by the Responsible Authority
Notice of Decision issued by a delegate of the Responsible Authority
Notice of Decision issued by the Responsible Authority
Refusal is issued by a delegate of the Responsible Authority
Refusal is issued by the Respopnsible Authority
No Permit Required
Withdrawn
Lapsed



Decisions Maintenance Form



Decisions Maintenance Form for PPARS information

Application

This field details the actual Application and the Primary Location of the Application.

Decision Details - Date

This field details the date of the Decision. The system will default to the system date, but can be changed by double clicking in the field to display the Calendar function and selecting a specific date or keying in the required Date.

Decision Details - Effective Date

This is an optional information field only and performs no re-calculation or removal of Expiry Dates. This field is incorporated in the Decisions extract.

Decision Details - Approval Number

This field displays the system generated Approval Number.

Decision Details - 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.

Decision Details – Decision Description

This field is the description of the Decision Code.

Decision Details - 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.

Decision Details - Authority

This is the description of the chosen Authority.

Decision Details - Rejection Reason

This field may be used to enter a Rejection Reason. The User may enter the Rejection Reason Code if know, or use the Pop Up Button to select from a list of predefined Rejection Reason Codes.

Decision Details - Rejection Reason Description

This is the description of the Rejection Code.

Decision Details - Under Appeal

If this flag is checked, the Decision on the Application is Under Appeal. This may then hold any further proceedings on the Application until results of the Appeal are known. If the flag is unchecked, the Decision is deemed as current.

When flagged as Under Appeal then if a Status has been assigned within the Decision Parameters for the Under Appeal then the Application will be updated to that Status and the words 'Under Appeal' will appear on the Summary form next to the Decision information. If a Status has not been defined for the Under Appeal within the Decision Parameters then the Application will retain the same status as for the Decision but the words 'Under Appeal' will still display on the Summary Form.

Decision Details - Recalculate Expiry Date
The value in this field will default from the Decision Type.

If the Decision Type has been set to recalculate the Expiry Date then this field will automatically be flagged on when entering a Decision.

If the Decision Type has been set so that the recalculate Expiry Date is flagged off on the Decision Type, then this field will automatically be flagged off when entering a Decision.

Note that this is only a default value and can be overridden at the time of entering the Decision on the Application.

Decision Details – Respond to Referral
Where the Decision being added has had the 'Respond to Referral' field checked on in the parameter, then this is then carried through to this display and added to the Application. Once added this will then display as flagged ON within the Application Data Maintenance display.

NOTE: - This field only displays where the Application has been created via the EDALA Take Up process and the Decision has the Respond to Referral field flagged ON.

Decision Details – Notify Decision
Where the Decision being added has had the 'Notify Decision' Option defined on in the parameter, then this is then carried through to this display and added to the Application. Once added this will then display as flagged ON within the Application Data Maintenance display.

NOTE: - This field only displays where the Application has been created via the EDALA Take Up process and the Decision has information defined within the Notify Decision Option..

Decision Details – Final Approval
Where the Decision being added has had the 'Final Approval' field checked on in the parameter, then this is then carried through to this display and added to the Application. Once added this will then display as flagged ON within the Application Data Maintenance display.

NOTE: - This field only displays where the Application has been created via the EDALA Take Up process and the Decision has the Final Approval field flagged ON.

Decision Details – Statutory Time Frame
Where the Decision being added has been flagged as 'Include in PPARS' then this field is available for selection. The information available in the Dropdown is then exported as part of the PPARS extract information. The options available are :

Selection	**PPARS Value**
Not Yet Determined	0
No (greater than 60 days)	1
Yes (less than or equal to 60 days)	2

NOTE: - This field only displays where the Application has been flagged as 'Include in PPARS' and the Decision has been flagged as 'Include in PPARS'.

Decision Details – Responsible Authority Outcome

Where the Decision being added has been flagged as 'Include in PPARS' then this field is available for selection. The information available in the Dropdown is then exported as part of the PPARS extract information. The options available are :

Selection	PPARS Value
In Progress	0
Permit is issued by a delegate of the Responsible Authority	1
Permit is issued by the Responsible Authority	2
Notice of Decision issued by a delegate of the Responsible Authority	3
Notice of Decision issued by the Responsible Authority	4
Refusal issued by a delegate of the Responsible Authority	5
Refusal issued by the Responsbile Authority	6
No permit required	7
Withdrawn	8
Lapsed	9

NOTE: - This field only displays where the Application has been flagged as 'Include in PPARS' and the Decision has been flagged as 'Include in PPARS'.

Decision Details - Comment

This field is a free text field allowing the User to enter any comments required regarding the Decision.

Application/Contribution Fees

The Fees form will list all Fee Codes, their Descriptions, the Calculated, Accepted, Paid and Refunded Amounts and the Balance on each Fee Code that were generated automatically at Lodgement of the Application.
To add any additional Fee Codes, click on the Insert Button and add the required Fee Code, amount and comments if necessary.
There are a number of options available that may be applied to each fee code:

Application / Contribution Fees Maintenance Form

The Application / Contribution Fee Maintenance Form allows the User to Enquire, Insert and Modify Fees on an Application. On the Options Section of this form some buttons may either be dimmed or bolded depending on the fee that has focus eg. if no overpayment has been allocated the application the Overpayment Allocation button will be dimmed. Additionally when on the Contribution Fees display options will display to take the User to the Application Fee display and visa versa. 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:

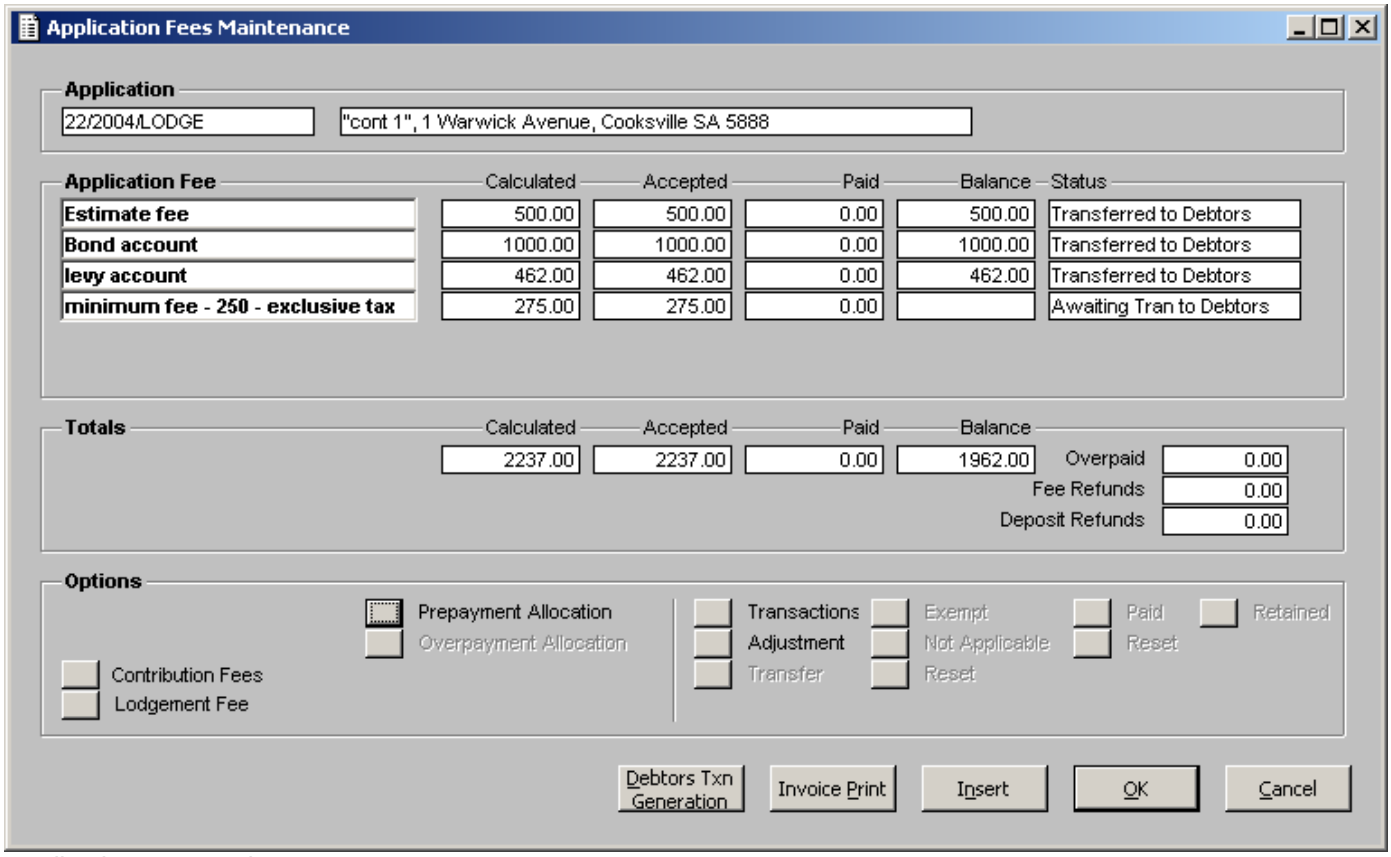
"Do you want to adjust the Timesheet?
(Otherwise the Normal Adjustment is performed) '
Yes,No,Cancel"

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 Application 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.



Application Fees Maintenance Form

Application

This field consists of two boxes. The first field details the actual Application Number and Type, and the second the Primary Location of the Application.

Application Fee

This field will detail any fees that have been added to the Application.

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.

Status

This field details the status of the particular fee involved. Once one of the buttons described below are activated against the fee, it's 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 Application.

Totals - Accepted

This field details the actual Total of all the fees Accepted that are attached to this Application.

Totals - Paid

This field details the actual Total of all the fees Paid that are attached to this Application.

Totals - Balance
This field details the actual Total of all the fees Balance that are attached to this Application.

Totals - Overpaid
This field details the actual Total of all the fees Overpaid that are attached to this Application. The User can detail out to the Transaction Maintenance Form or the Receipt Enquiry Form applicable to the Fee with focus.

Totals - Fee Refunds
This field details the actual Total of all the fees Refunded that are attached to this Application.

Totals - Deposit Refunds
This field details the actual Total of all the Deposits Refunded that are attached to this Application.

Options – Application Fees
Selection of this button enables the User to toggle to Application Fees.

Options – Allocation Enquiry
Selection of this button displays the Allocation Enquiry Form. The User can detail out to the Receipt Enquiry Form or the Allocation Enquiry Form applicable to the Fee with focus.

Options – Bank Guarantee Details
Selection of this button allows the User to display the Bank Guarantees that have been allocated to the Fees.

Options – Contribution Fees
(For Sites that use Development Contribution Plans)
This option will load Contribution Fees. If fees are already loaded, this will display Fees and allow Fees to be inserted and/or maintained.

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 Application 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 Application.

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.

Options – Prepayment Allocation
Selection of this button displays the Prepayment Allocation Form. Enter a Prepayment Reference Number to display the Prepayment details, or use the Prepayment Selection form to select a Prepayment Receipt. If no Prepayment has been receipted to the application the button will be dimmed.

Options – Overpayment Allocation
Selection of this button displays the Allocation Selection form. Select the Continue button to display the Fees Allocation Maintenance Form. This button will be dimmed unless the application has a receipt for overpaid monies and unpaid fees outstanding. If no overpayment has been receipted to the application the button will be dimmed.

Options – Bank Guarantee Allocation
Selection of this button allows the User to create a new Bank Guarantee or search for an existing one and modify or allocate funds.

Options – Non-Cash Allocation

Selection of this button allows the User to select a Non-Cash Type. Once the Type is selected the User can search for a Non-Cash Number or create a new one. This Option is only available when viewing Contribution Fees.

Options – Transactions
Selection of this button displays the Transaction Maintenance Form. The User can detail out to receipts or reversals applicable to the Fee with focus.

Options – Adjustment
Selection of this button displays the Application Fees Maintenance Form with details for the Fee with focus. A new Accepted Fee can be entered together with comments. Selecting Continue will adjust the Fee.

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 Application 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.

Options – Transfer
Focus on any Fee that has been paid in full or part will bold this button. This will enable the User to transfer funds from a Paid Fee to an Unpaid Fee.

Options - Plan Details
Selection of this button allows the User to display the Plan that is associated to the Contribution Fees that have been loaded. This Option is only available when viewing the Contribution Fees.

Options – Exempt
Focusing on an Unpaid Fee and selecting the Exempt Button will exempt the Fee and adjust the amount owed.

Options – Not Applicable
Focusing on an Unpaid Fee and selecting the Not Applicable Button will not apply the Fee and adjust the amount owed.

Options – Reset

The Reset buttons will reset the original Fee, eg. with a Fee of $300 adjusted to $150 – if this fee is Exempted or Not Applied, then Reset will reset it to $300.

Options - Paid
Selection of the button changes the status of the Fee to Paid and adjusts the amount owed.

Options – Retained
This button when clicked will ensure the fee that has been highlighted is Kept. The Status will then be shown as Kept.

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.

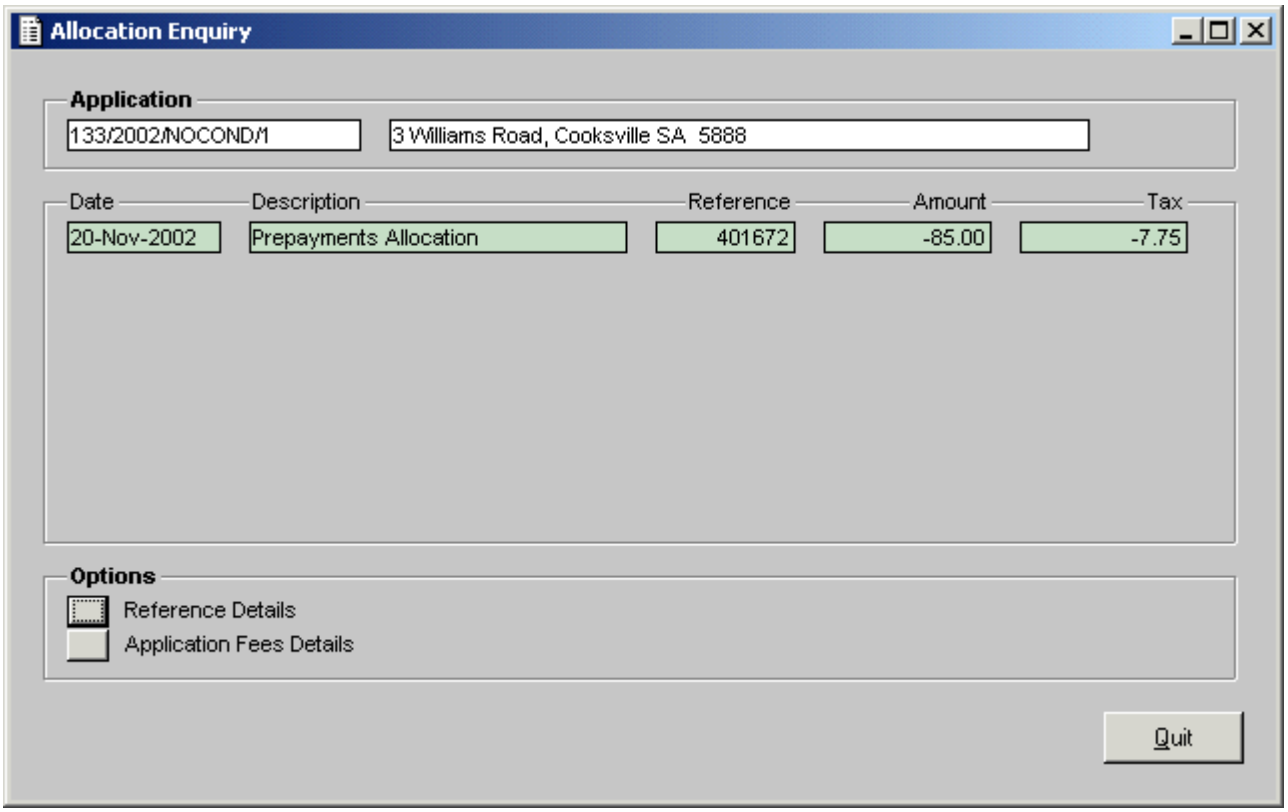
When the User selects this Button the Names Maintenance form is displayed to allow the selection of the Name / Debtor that the transactions are to be transferred to.

NOTE: The Debtors Txn Generation Button is only displayed when using Pathway Debtors as the Accounting Method for the Application.

Invoice Print
The Invoice Print Button allows the generation of an Invoice from the Fees on the Application. 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 view any Receipts that have been paid and allocated.



Allocation Enquiry Form

Application
This field details the actual Total of all the fees calculated that are attached to this Application.

Date
This field displays 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.

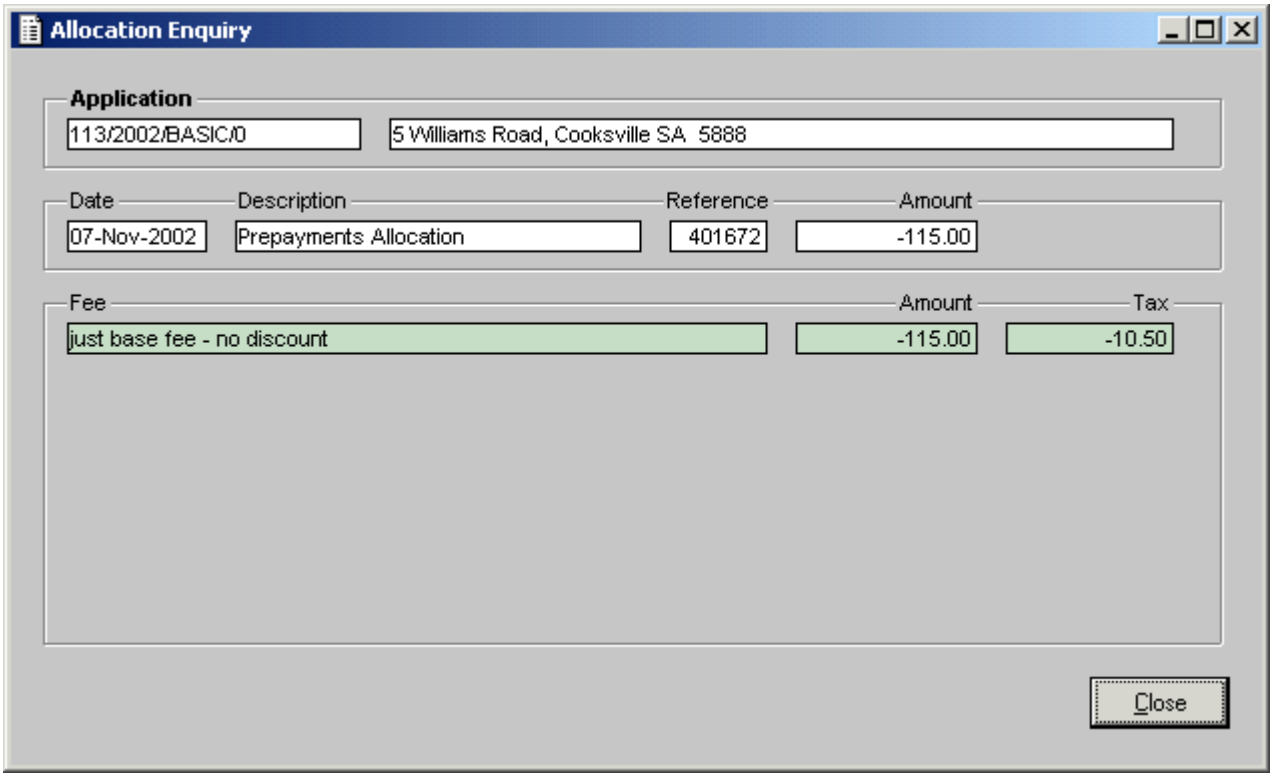
Tax
If the Fee is Taxable then the Tax Amount for the Transaction is displayed in this field.

Options – Reference Details
If the Reference Detail Button is selected then the Receipt details are displayed.

Options – Application Fees Details
If the Application Fees Detail Button is selected then the Application Allocation Enquiry Form is displayed.

Allocation Enquiry Form

The Allocation Enquiry allows the User to view Allocations made against an Application Fee.



Allocation Enquiry Form

Application
This field details the actual Total of all the fees calculated that are attached to this Application.

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.

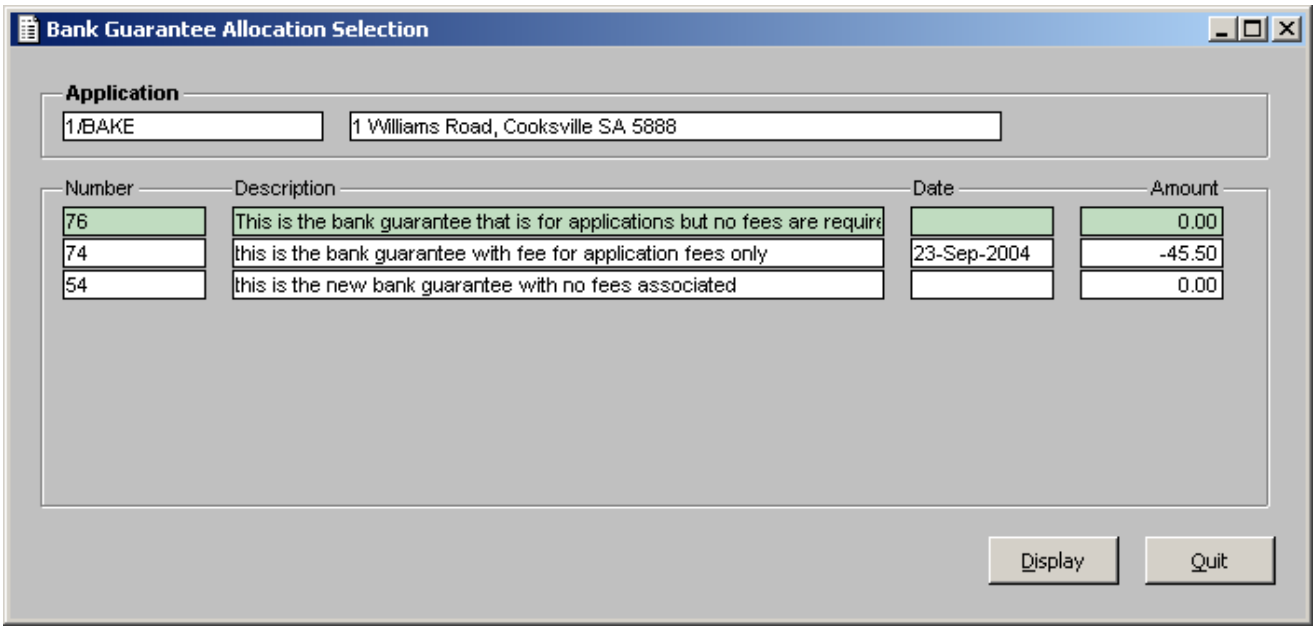
Tax
This field will detail the actual dollar amount of Tax for the Allocation.

Bank Guarantee Allocation Selection Form

When the Bank Guarantee Allocation Option is selected from the Fees Maintenance Form the Selection form will be displayed if more than one Bank Guarantee has been assigned to the Application. From this from the User is then able to select the Bank Guarantee required to be displayed.

If the Option is selected from the Application Fees Maintenance Form then only Bank Guarantees that have been defined as for Application Fees or Applications will be displayed on the selection form.

If the Option is selected from the Contribution Fees Maintenance Form then only Bank Guarantees that have been defined as for Contribution Fees or Contributions will be displayed on the selection form.



Bank Guarantee Allocation Selection Form

Application

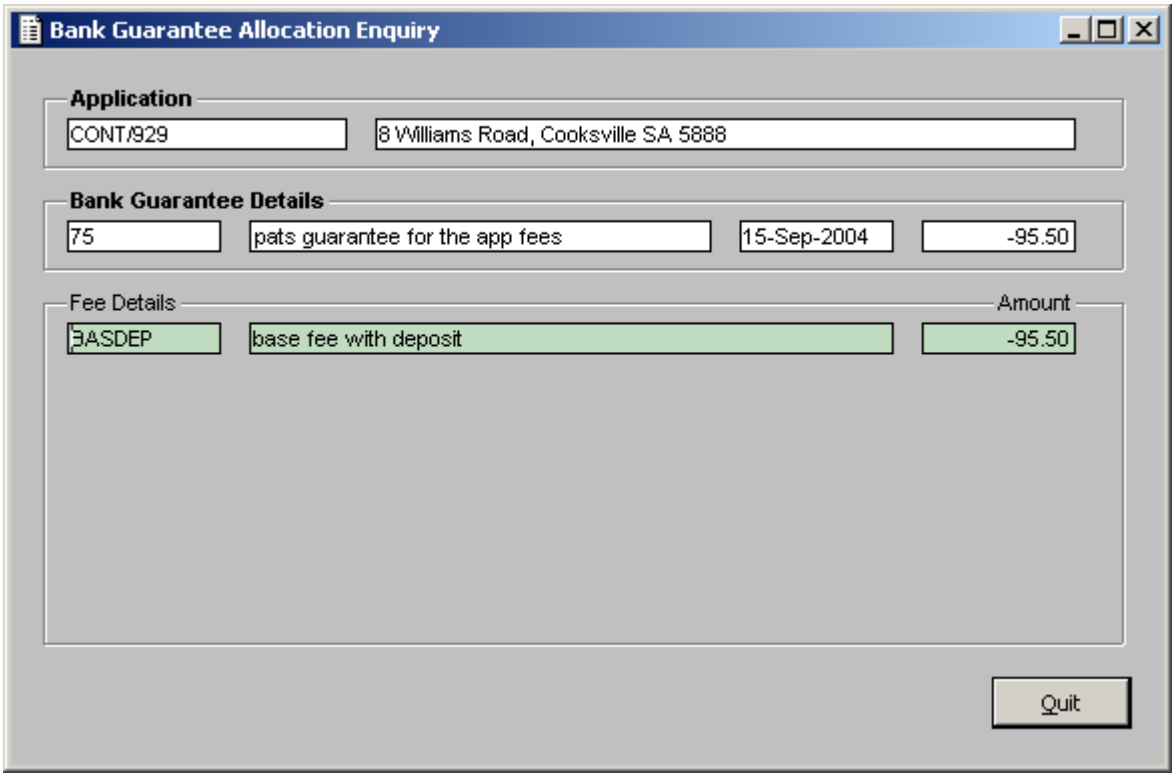
The Application currently being maintained is displayed in this field along with the location of the Application.

Bank Guarantee Information

Details of the Bank Guarantee are displayed on the line. This includes the Number, Date and Agreed value for the Bank Guarantee. The User can focus on the required Bank Guarantee and select the Display button to view the Bank Guarantee information.

Bank Guarantee Allocation Enquiry Form

The Bank Guarantee Allocation Enquiry allows the User to view the Bank Guaranetee Allocations made against an Application.



Bank Guarantee Allocation Enquiry Form

Application

The Application Number and Location are displayed in these fields.

Bank Guarantee Details

The Bank Guarantee section shows the Bank Guarantee Number, Detail of the Guarantee, the date of the Allocation and the Amount that was allocated to the Application.

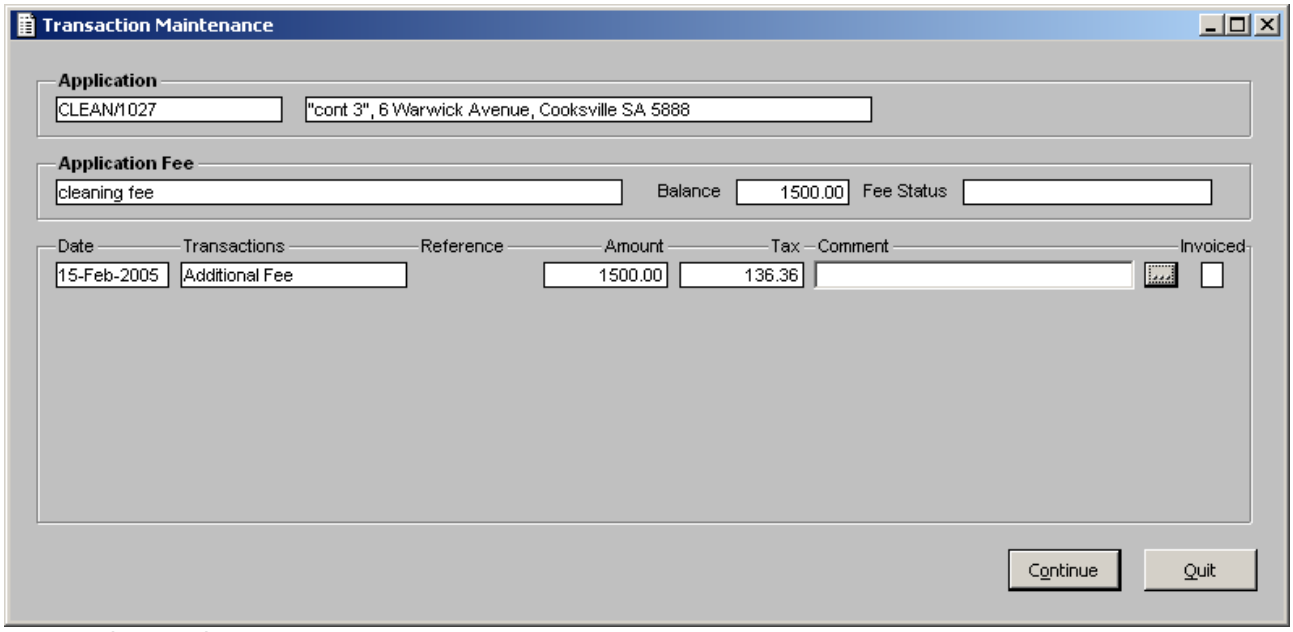
Fees Details

This field gives a full description of the actual Allocation.

Transactions 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.



Transactions Maintenance Form

Application

These fields display the Application Number and Application Location.

Application Fee

This field displays the Fee description.

Application Fee Details - Balance

This field details the Balance of the Application Fee.

Application Fee Details – Fee Status

When Applications are linked to Pathway Debtors then the Status of the Transaction is displayed in this field. Otherwise the status of the Fee will be displayed ie Exempt, Paid etc.

Date

This field details the date of the Fee Transaction.

Transactions

This field details the Application Fee by each Transaction.

Reference

The Reference Field displays the Reference of the Payment. In most cases this would be the Receipt Number. In the case of Applications being linked to Pathway Debtors then this Reference will represent the Invoice Number from Debtors.

Amount

This field details the Amount of the Fee Transaction.

Tax

The Tax Amount applicable for the Fee is displayed in this field. If no Tax is to apply to the Transaction then this field will be blank. The Tax Amount shown has already been included in the Amount Field.

Comment

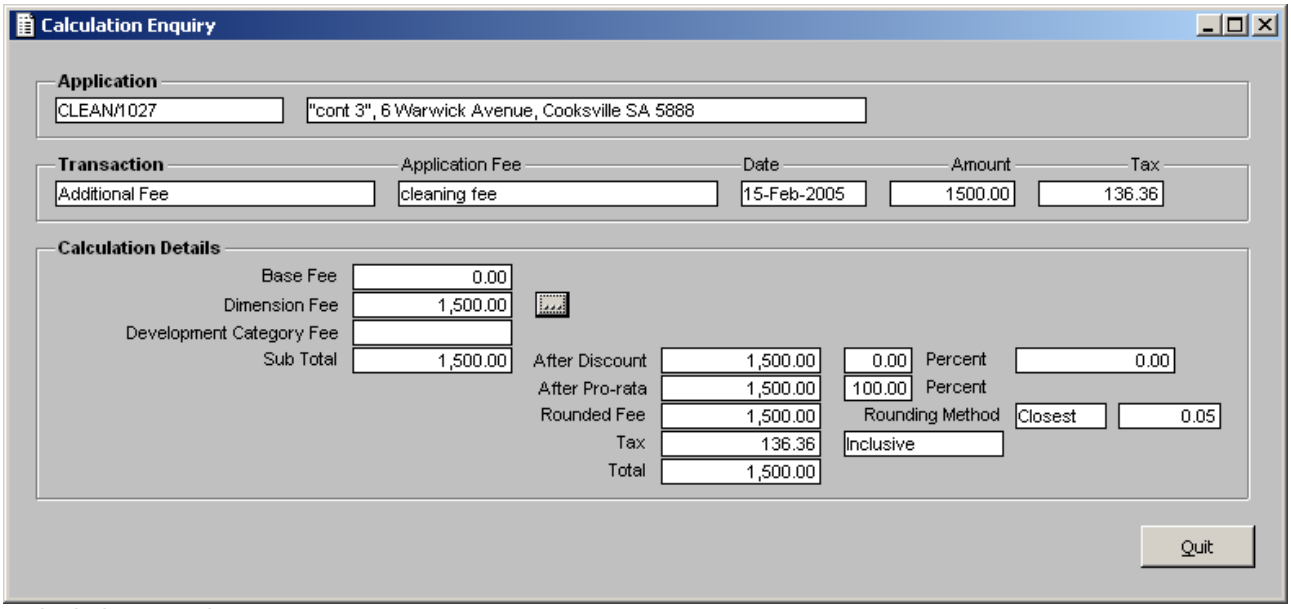
This fee details any comment that may have been put against the fee Transaction. The Detail Button will take the User out to the Calculation Enquiry Form for further details of the Transaction.

Comment field is mandatory if Mandatory Fee Adjustment Comment is checked on in the Class System parameters.

Invoiced

The Invoiced field indicates whether the Transaction has been Invoiced as part of the Debtors interfacing function.

Calculation Enquiry Form



Calculation Enquiry Form

Application

These fields display the Application Number and Application Location.

Transaction

The way that the Fee has been added, or the way that the fee has been modified is shown in this field. For example if the Fee had been loaded via the lodgement process then this field would display the description 'Lodgement', if the Fee had been added during Maintenance then the field would display the description 'Additional Fee'.

Application Fee

The Fee that the Calculation enquiry is showing the details for is displayed in this field.

Date

The Date that the Transaction occurred is shown in this field.

Amount

The Amount of the Transaction / Fee is displayed in this field. If Tax is applicable to the Fee then the Amount shown has the Tax Amount included in its value. This Amount field represents the value to be paid.

Tax

The Tax Amount applicable for the Fee is displayed in this field. If no Tax is to apply to the Transaction then this field will be blank. The Tax Amount shown has already been included in the Amount Field value.

Calculation Details – Base Fee

If a Base Fee has been defined for the Fee within the Parameters then it is shown in this field. This field can be blank or zero if the Fee is being calculated purely by a Dimension and/or Development Category.

NOTE: - Where the Fee has been defined as having Inclusive Tax then the Tax component is already included in the Amount displayed in this field. Where the Fee has been defined as having Exclusive Tax then the Tax component has NOT been included in the Amount displayed in this field.

Calculation Details – Dimension Fee

If the Fee has Dimensions associated to it and they have been used to assist with the calculation of the Total Fee then the Dimension component of the Fee is shown in this area. Additionally a Detail Button is available next to this field to show how the Dimension component has been calculated. Detailing out on this Button will display the Dimension Calculation Enquiry form.

Calculation Details – Development Category Fee

If the Fee has Development Categories associated to it and they have been used to assist with the calculation of the Total Fee then the Development Category component of the Fee is shown in this area. Additionally a Detail Button is available next to this field to show how the Development Category component has been calculated. Detailing out on this Button will display the Development Category Calculation Enquiry form.

Calculation Details – Sub Total
The sum of the Base Fee, Dimension Fee and Development Category Fee is shown in the Sub Total field.

Calculation Details – After Discount
If the Fee has been defined as being a Discount Fee then the value of the Fee after the Discount has been applied is shown in this field. This represents the Sub Total Amount minus the Discount Amount.

Calculation Details - Percent
If Discount is applicable for the Fee then the Percentage and the dollar value of the Discount are shown in the Percent fields.

Calculation Details – After Pro-rata
If the Fee has been defined as being a Pro-rata Fee then the value of the Fee after the Pro-rata has been applied is shown in this field. This represents the After Discount Amount with the Pro-rata Percentage applied.

Calculation Details – Percent

Calculation Details – Rounded Fee / Rounding Method

Calculation Details – Tax

Calculation Details – Total

Application Fee Details - Balance
This field details the Balance of the Application Fee.

Application Fee Details – Fee Status
When Applications are linked to Pathway Debtors then the Status of the Transaction is displayed in this field. Otherwise the status of the Fee will be displayed ie Exempt, Paid etc.

Date
This field details the date of the Fee Transaction.

Transactions
This field details the Application Fee by each Transaction.

Reference
The Reference Field displays the Reference of the Payment. In most cases this would be the Receipt Number. In the case of Applications being linked to Pathway Debtors then this Reference will represent the Invoice Number from Debtors.

Amount
This field details the Amount of the Fee Transaction.

Tax
The Tax Amount applicable for the Fee is displayed in this field. If no Tax is to apply to the Transaction then this field will be blank. The Tax Amount shown has already been included in the Amount Field.

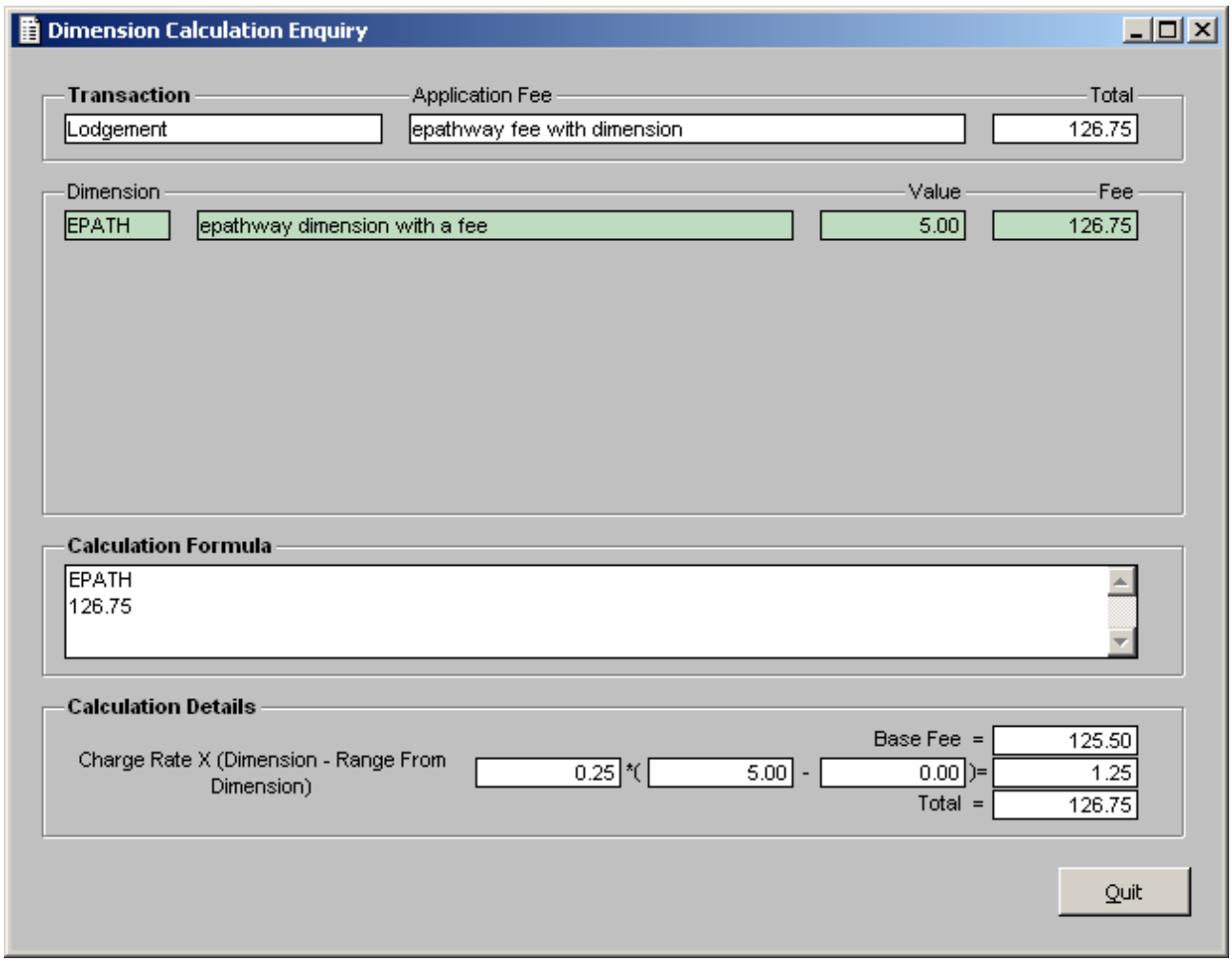
Comment

This fee details any comment that may have been put against the fee Transaction. The Detail Button will take the User out to the Calculation Enquiry Form for further details of the Transaction.

Invoiced
The Invoiced field indicates whether the Transaction has been Invoiced as part of the Debtors interfacing function.

Dimension Calculation Enquiry Form

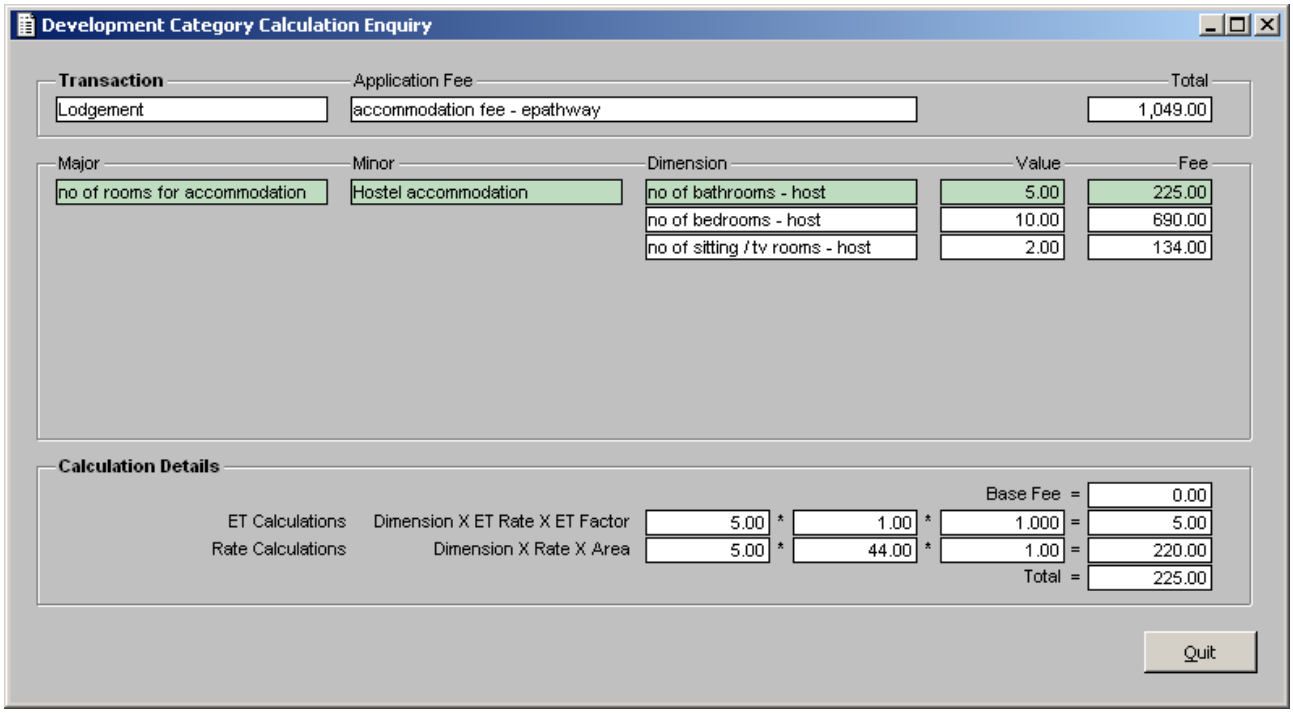
The Dimension Calculation Enquiry form shows the details that have been used to calculate out the fee amount.



Dimension Calculation Enquiry Form

Development Category Calculation Enquiry Form

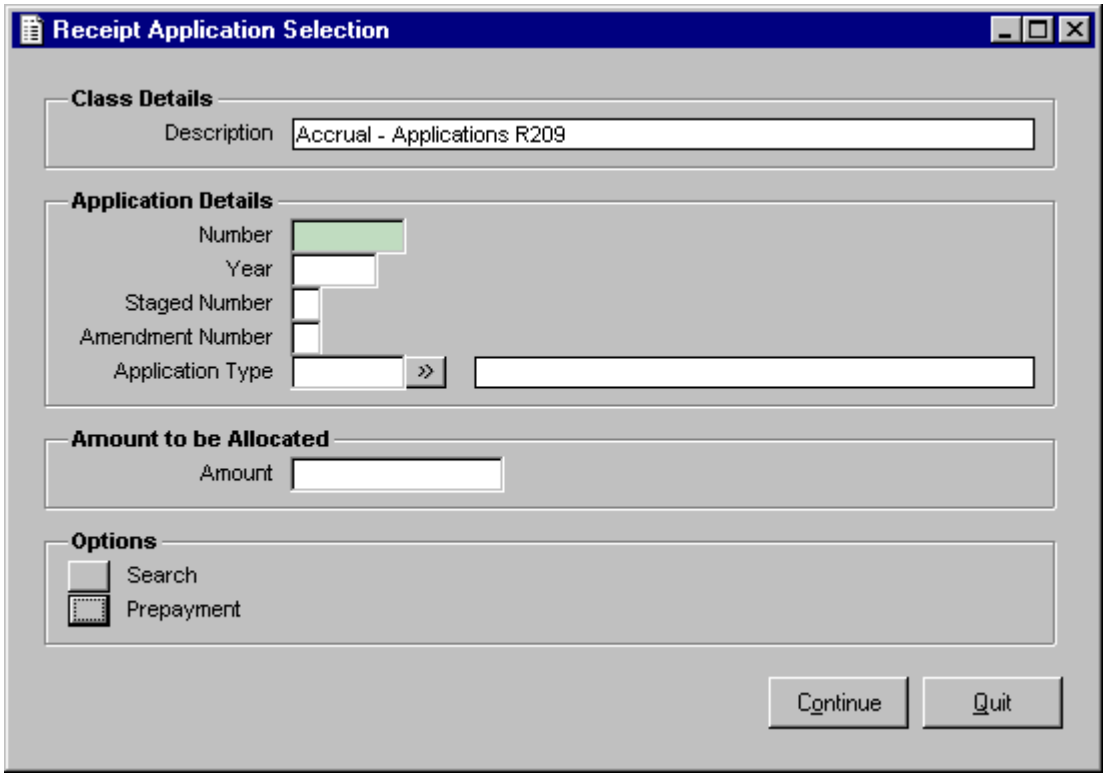
Where fees have been calculated using Development Categories then this form will display the calculations that have been performed to make up the fee.



Development Category Calculation Enquiry Form

Receipt Application Selection Form

This form allows the User to create a receipt allocated directly to an Application. The form consists of the following fields. This form is displayed as part of Receipt Entry for an Application when not all details are entered on the Entry form. From this form the User is able to search for an existing Application, or create a Prepayment against the Application Class.



Receipt Application Selection Form

Class Details
This field displays a description of the Application Class.

Application Details – Number
Enter the Application Number if known.

Application Details – Year
Enter the year of the Application.

Application Details - Staged Number
Enter staged number of the Application eg. 1, 2 or 3 etc.

Application Details – Amendment Number
Enter the Amendment Number of the Application eg. A, B or C etc.

Application Details – Application Type

Enter the Application Type Code, if known, or use the Pop Up to Select the required Code.

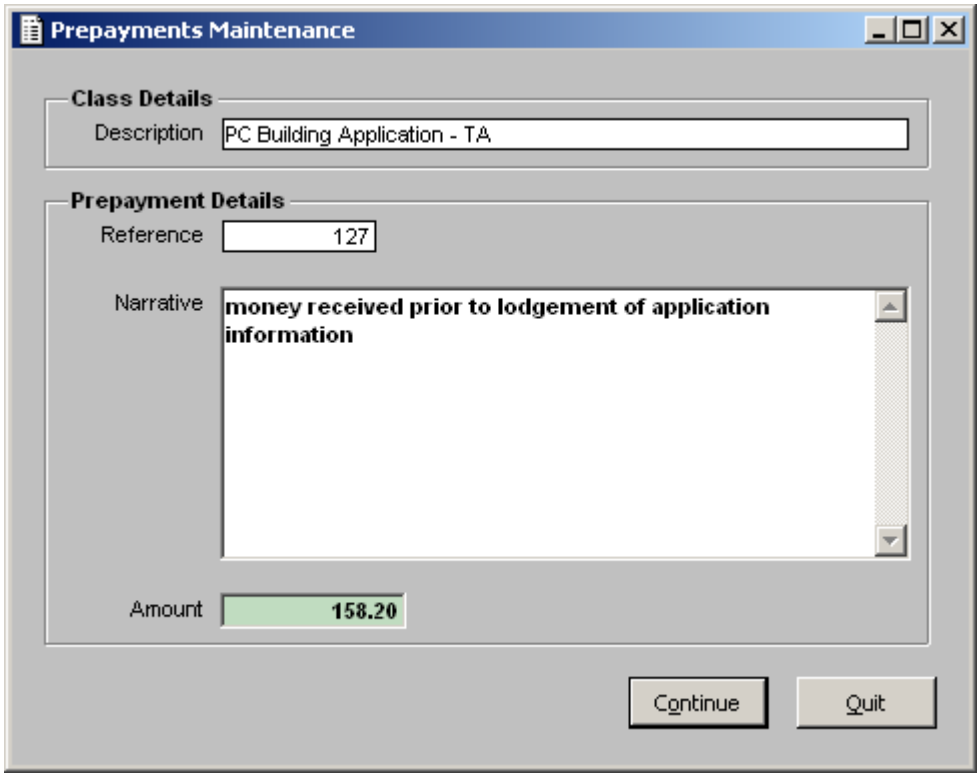
Allocation Amount
Enter the amount to be receipted.

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.

Prepayments Maintenance Form

This form allows the User to create a Prepayment receipt that can be allocated to an Application at a later time. It is displayed for the User when the Prepayment Option has been selected from the Receipt Application Selection form. This form is displayed as part of Receipt Entry for an Application when not all details are entered on the Entry form.



Prepayments Maintenance Form

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

Prepayment Details - Reference
The Receipting Module automatically assigns a Reference Number for the Prepayment at the time that the Prepayment Receipt is being entered. The Prepayment Reference is then used to select the Receipt and allocate the Prepayment Amount to an Application's Fees.

Prepayment Details - Narrative
Additional information regarding the Prepayment can been entered in the Narrative field when entering in a Prepayment Receipt.

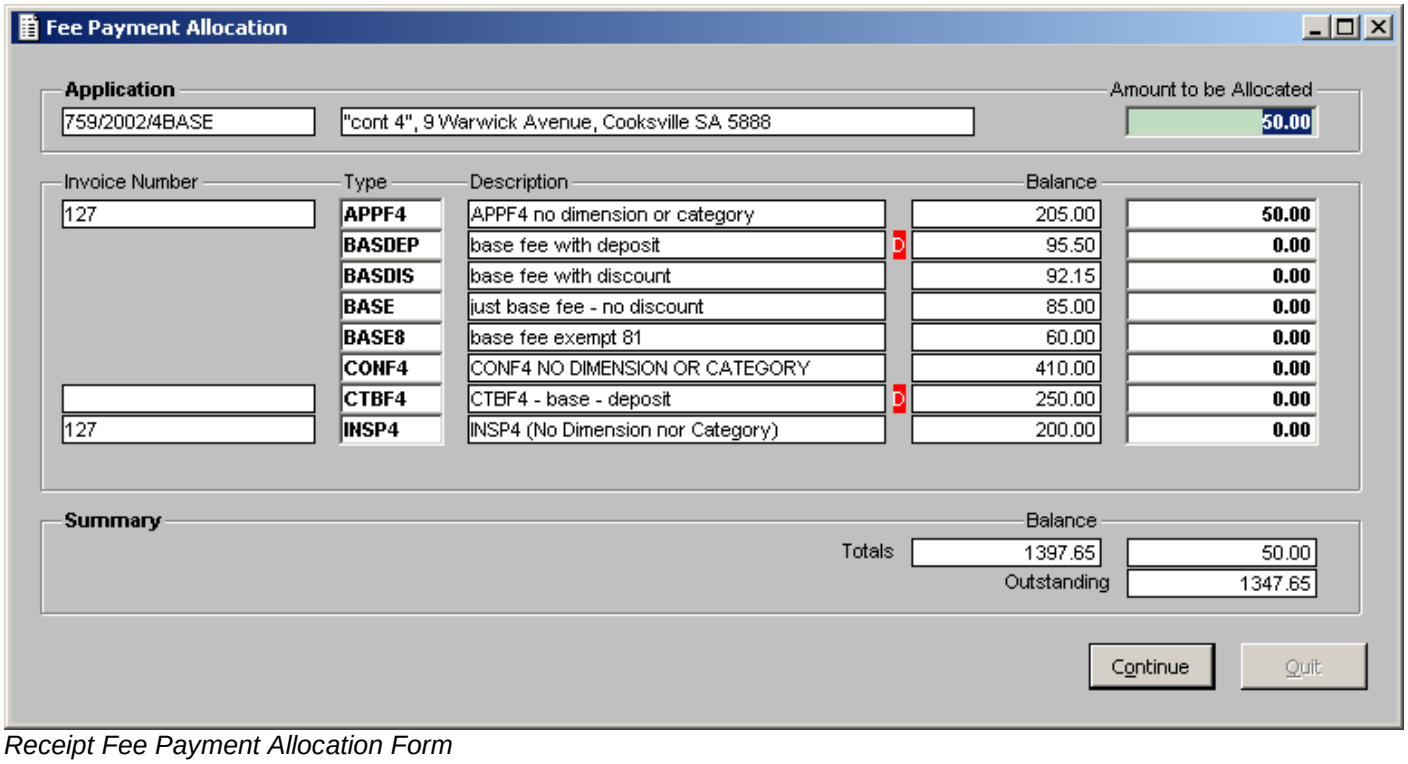
Prepayment Details - Amount
The Dollar Value of the Prepayment Receipt is entered into the Amount field.

Receipt Fee Payment Allocation Form

The Fee Payment Allocation Form displays when a Receipt Payment is being made for an Application where the Amount being Paid is less than the Amount Outstanding for the Application. This form can display during the following processes:

- Receipting to an Application
- Allocating a Prepayment to an Application

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

Application
The Application 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 be 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.

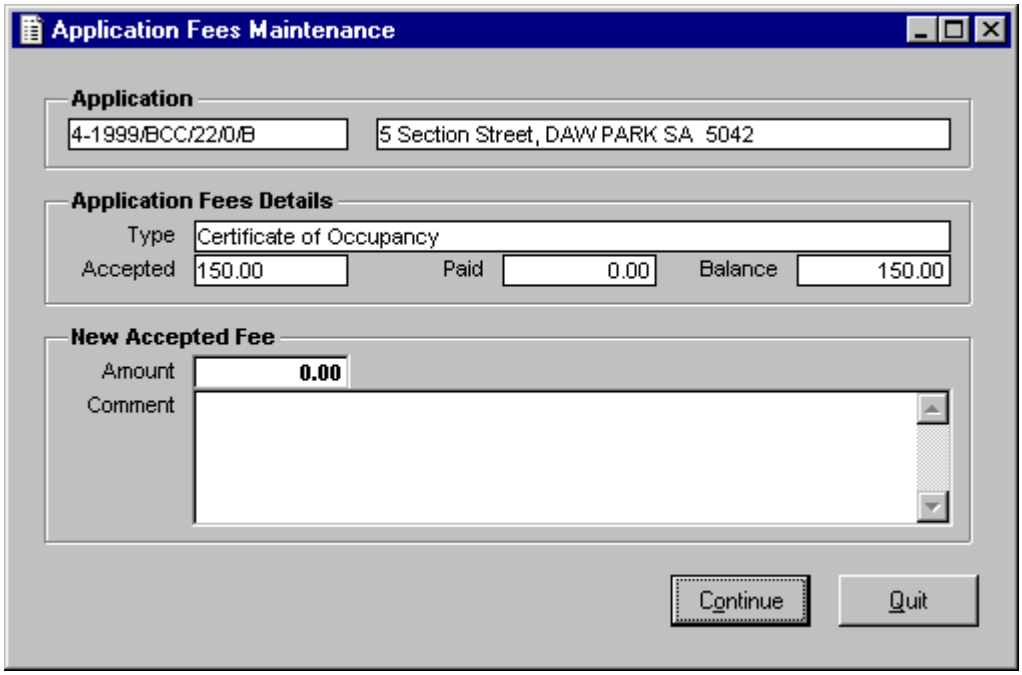
Totals Allocated
The Totals Allocated Field represents the Total of the figures entered against each Fee record.

Outstanding
The Outstanding Field represents the amount that will be Outstanding on the Application after the Allocation has been accepted.

Application Fees Maintenance 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 Application.



Application Fees Maintenance/Adjustment Form

Application

The two fields detail the actual Application selected and its Primary Location.

Application Fees Detail - Type

This field details the Fee type selected and its full description.

Application Fees Detail - Accepted

This field details the actual dollar value that has been accepted for the fee.

Application Fees Detail - Paid

This field details the dollar value paid against the fee.

Application Fees Detail - 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.

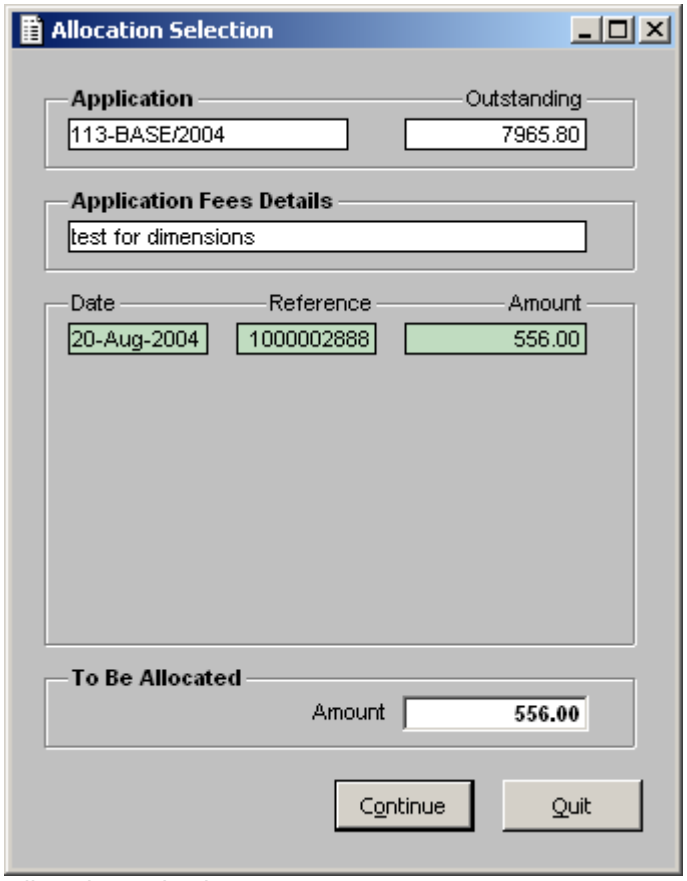
NOTE: - When the Fee has been Transferred to Debtors then it is not possible to Increase the Fee Amount. The Adjustment can only be a Negative Adjustment. If the Fee is to increased then it will need to be added as another fee entry to the Application.

New Accepted Fee - Comment

This field allows the User to enter a comment regarding the fee being adjusted. This is a free text field.

Allocation Selection Form

This form allows the User to select an Allocation to be applied to a fee and is usually displays as part of the Overpayment Allocation or Transfer processes.



Allocation Selection Form

Application
This field details the current Application.

Outstanding
This field details the Outstanding amount of the Fee.

Application Fee Details
This field details the actual name of the field being modified.

Date
This field details the date of the Allocation.

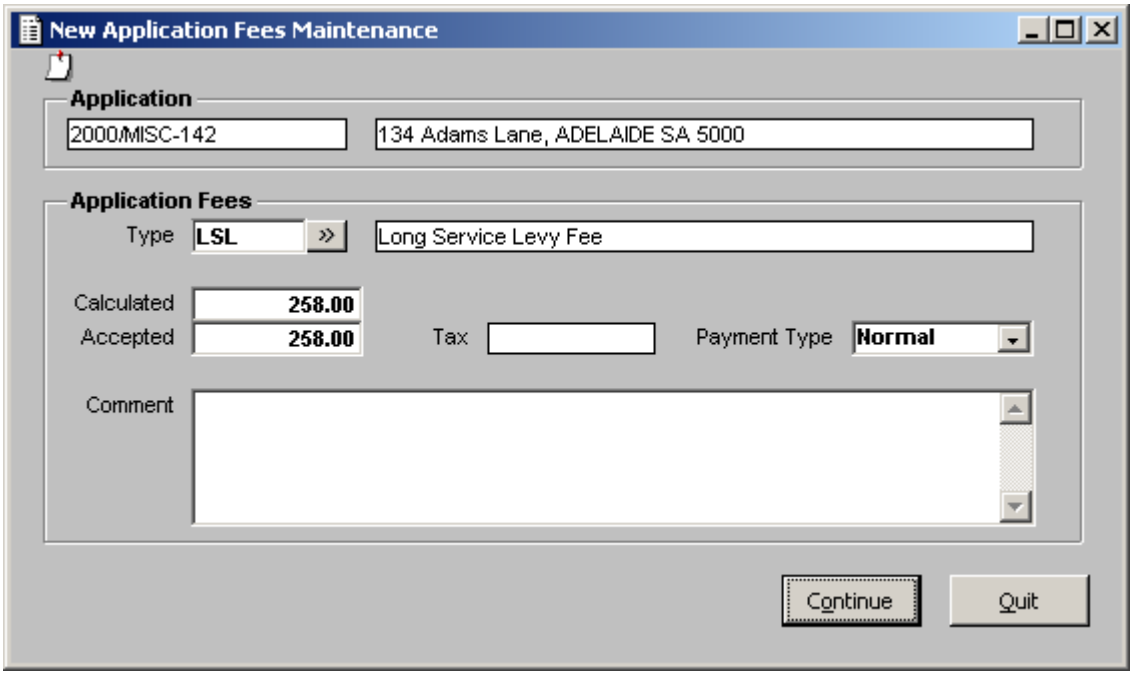
Reference
This field details the Reference Number assigned to the Allocation.

Amount
This field details the dollar value assigned to the Allocation.

To Be Allocated
This field details the amount to be allocated.

New Application Fee Maintenance Form

The New Application Fee Maintenance Form may be accessed by clicking on the Insert Button from the Application Fee Maintenance Form.



New Application Fee Maintenance Form

Application

These two fields detail the number of the current Application and its Primary Location.

Application Fee Details - Type

This field enables the User to enter an Application 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

The Tax field displays the amount of Tax that is applicable for the Fee. This figure is already included in the Accepted figure. If no Tax is applicable for the Fee then this field is blank.

Payment Type

If the Fee being added has been flagged as a LSL Fee then the Payment Type field will be displayed. This field defaults to Normal but can be changed by the User. The Options available from the dropdown are :-

- Normal
- Exemption
- Instalment

The Payment Type field is used in the Long Service Levy process.

If a Long Service Levy Fee is to be set to Exemption then the fee is added in the same manner as a normal fee however, after the Dimension Value has been entered and the user has returned to the New Application Fee Maintenance Form, the 'Accepted Value' will need to be changed to 0.00 for Full Exemption or to a new value to be paid (Partial Exemption). Details of the Exemption should be entered in the Comments field.

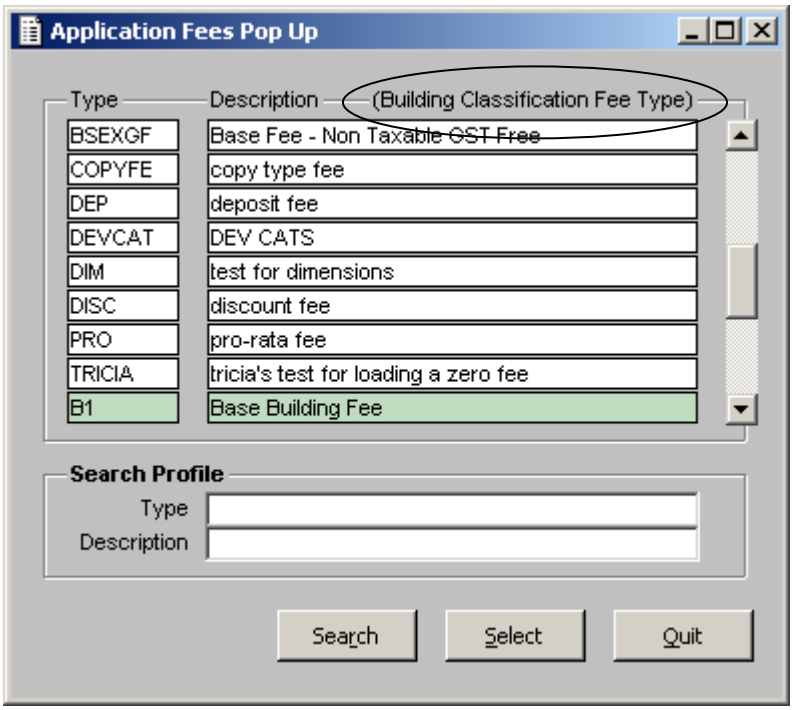
If a Long Service Levy Fee is to be set to Instalment then the fee is added in the same manner as a normal fee however, after the Dimension Value has been entered and the user has returned to the New Application Fee Maintenance Form, the 'Accepted Value' will need to be changed to 0.00. Details of the Instalment should be entered in the Comments field.

Comment

This field is free format and allows the User to enter a comment on the particular fee that is being added.

Application Fee Pop Up Form

The Application 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 display in the Fees Pop Up form if there are Consents on the Application.



Application Fee Pop Up Form

Type
This field displays the Code that has been assigned to the Fee Type.

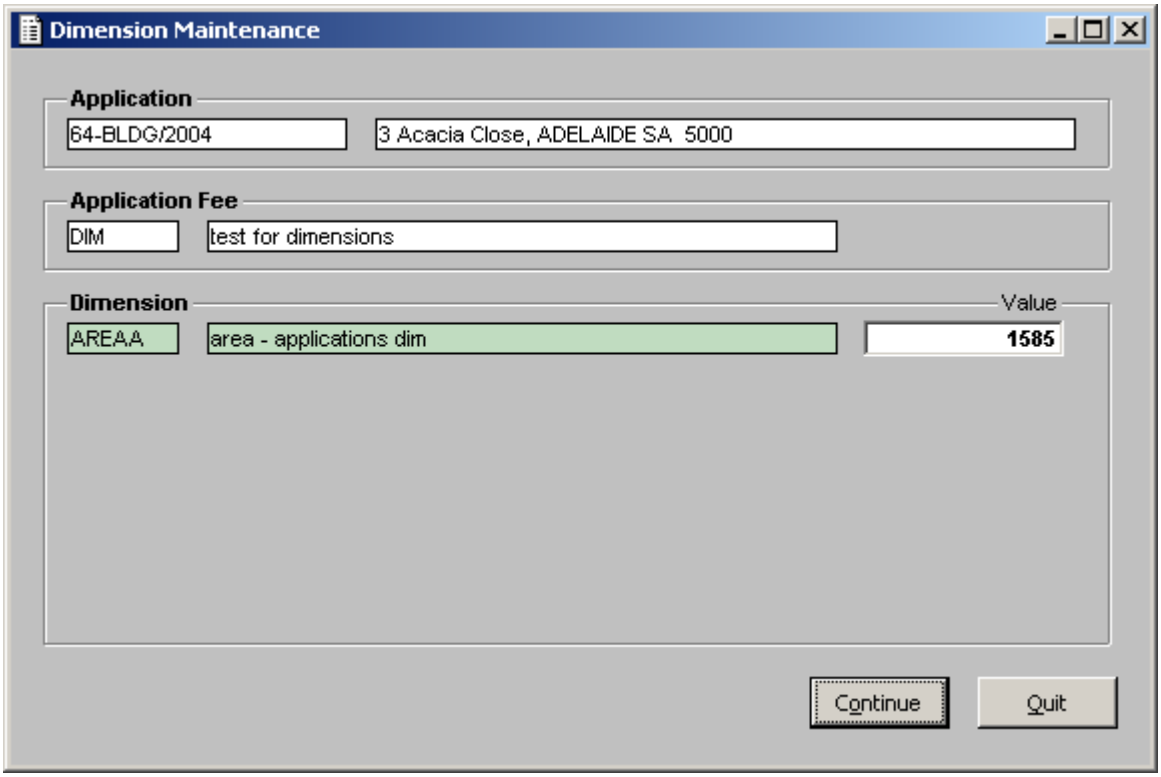
Description
This field gives a detailed description of the Application Fee Type.

Search Profile - Type
This field allows the User to enter an Application 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.

Dimension Maintenance Form

The Dimension Maintenance Form is displayed when a Fee is being added to an Application and that Fee has a Dimension associated to it. The User then enters in the Value for the Dimension and when the information is accepted the Fee Maintenance form is then redisplayed with the value of the Fee displayed.



Dimension Maintenance Form

Application

The Application Number and Location are displayed to inform the User of the Application that the Fee and its association Dimension are being added to.

Application Fee

The Application Fee and its Description are displayed to inform the User of the Fee that has been selected to be added to the Application.

Dimension

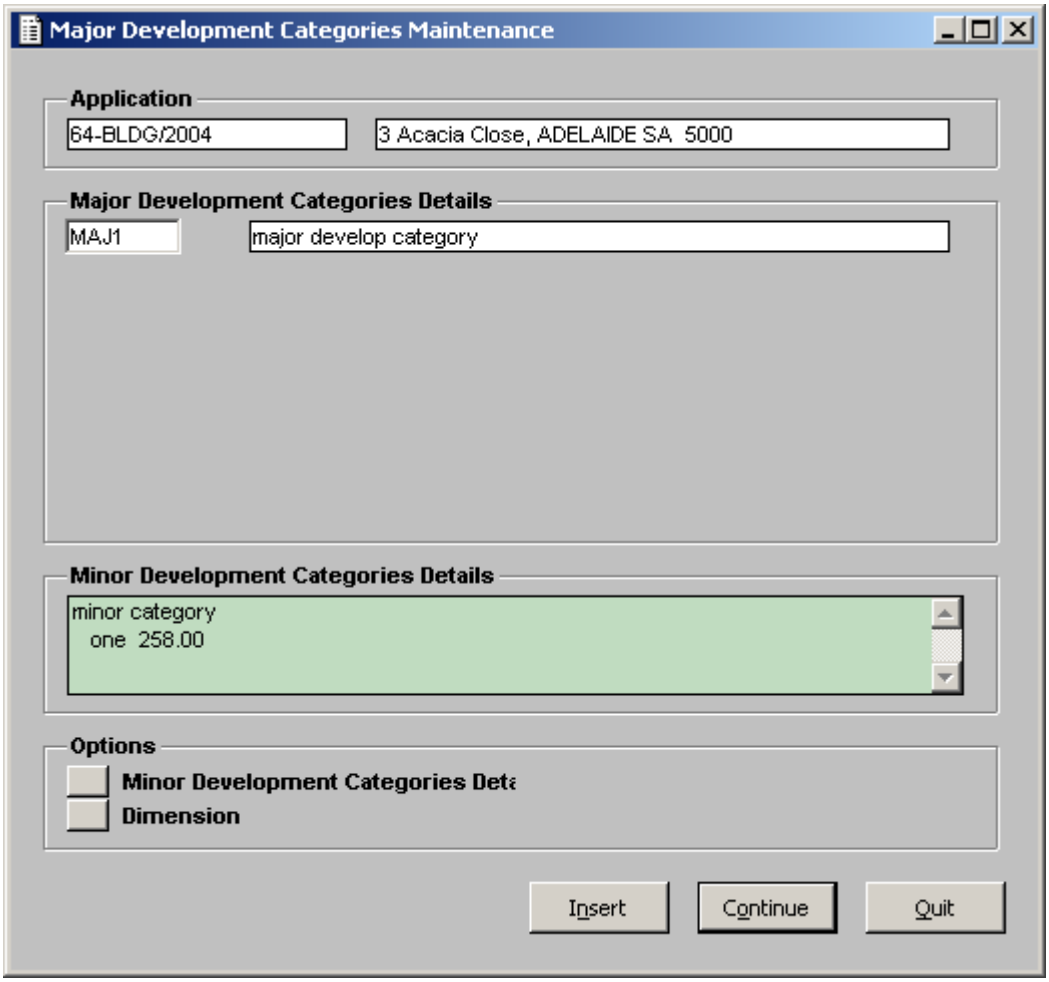
The Dimension Code and its description are displayed to inform the User of the Dimension that is associated to the Fee that is being added to the Application.

Value

Enter the value for the Dimension into this field. This is then recorded against the Fee and the Application.

Major Development Categories Maintenance Form

The Major Development Categories Maintenance Form is displayed when a Fee is being added to an Application and that Fee has Major/Minor Development Categories associated to it. The User then enters in the required Categories and the Dimension and when the information is accepted the Fee Maintenance form is then redisplayed with the value of the Fee displayed.



Major Development Categories Maintenance Form

Application

The Application Number and Location are displayed to inform the User of the Application that the Fee and its association Major/Minor Development Categories are being added to.

Major Development Categories Details

The Major Development Categories that have been added to the Fee are displayed in this area along with their Descriptions.

Minor Development Categories Details

As focus is placed on the Major Category so the information in this field will change to reflect the Minor Categories have been assigned to the Major currently in focus.

Options – Minor Development Categories Details

The Minor Development Option allows the User to update information or select additional Minor information for the Major Category currently in focus. This Option button will be bolded when there is already information entered in the Option.

Options – Question

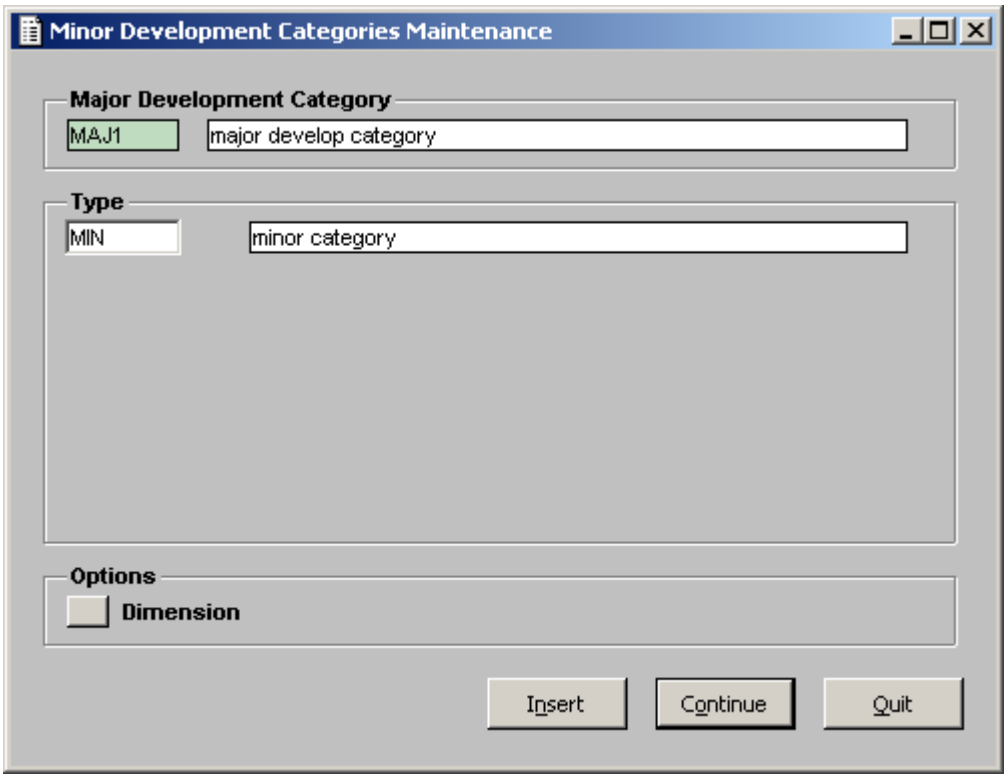
The Question Option allows the User to update information regarding Questions for the Major Category currently in focus.

Options – Dimension

The Dimension Option allows the User to update Dimension information for the Major. This Option button will be bolded when there is already information entered into the Option.

Minor Development Categories Maintenance Form

The Minor Development Categories Maintenance Form is displayed when a Fee is being added to an Application and that Fee has Major/Minor Development Categories associated to it. The User then enters in the required Categories and the Dimension and when the information is accepted the Fee Maintenance form is then redisplayed with the value of the Fee displayed.



Minor Development Categories Maintenance Form

Major Development Category

The Major Development Category that the Minor Category is being added to is displayed in this field.

Type

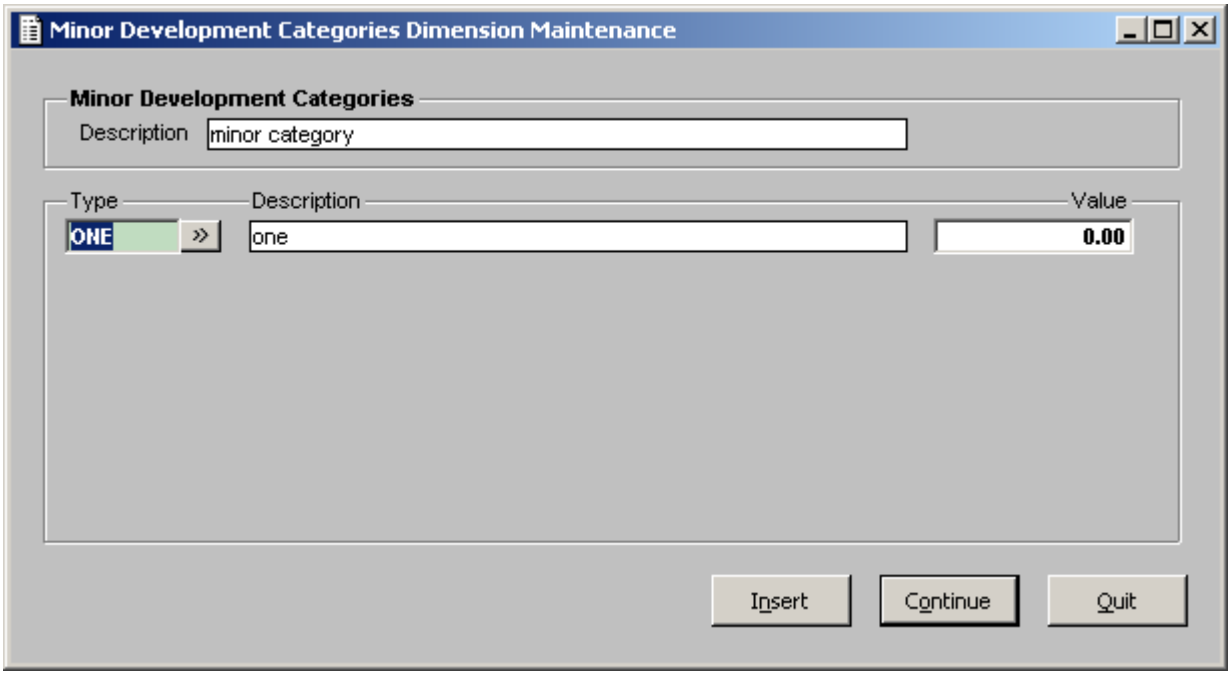
The Minor Types that have been assigned to the Major Category are shown in these fields.

Options – Dimension

The Dimension Option allows the User to update Dimension information for the Minor Category. This Option button will be bolded when there is already information entered into the Option.

Minor Development Categories Dimension Maintenance Form

The Minor Development Categories Dimension Maintenance Form is displayed when a Fee is being added to an Application and that Fee has Major/Minor Development Categories associated to it. The User then enters in the required Categories and Dimension and when the information is accepted the Fee Maintenance form is then redisplayed with the value of the Fee displayed.



Minor Development Categories Dimension Maintenance Form

Minor Development Categories
The description of the Minor Category that the Dimension(s) is for is displayed in this field.

Type
The Type of Dimension is shown in this field. The Pop Up can be used to display a list of available Dimensions.

Description
The Description of the Dimension that has been selected is displayed in this field.

Value
The Value of the Dimension is entered into this field.

If the Value of the Dimension is changed and this value is used in the calculation of an Application 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.

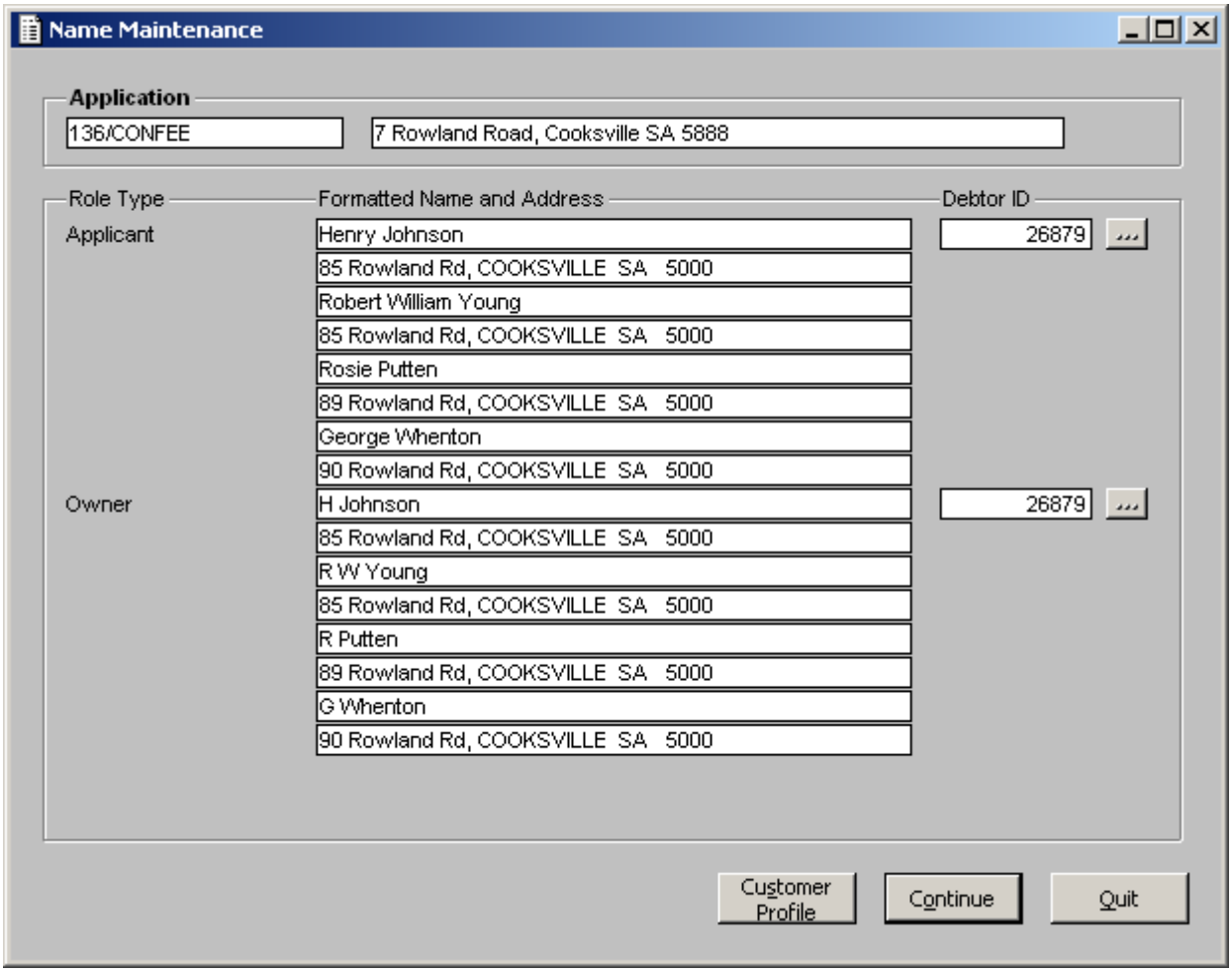
Name Maintenance Form

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 Application is for a Debtor
- when the Invoice Print Button has been selected from the Fee Maintenance Form and the Application 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.



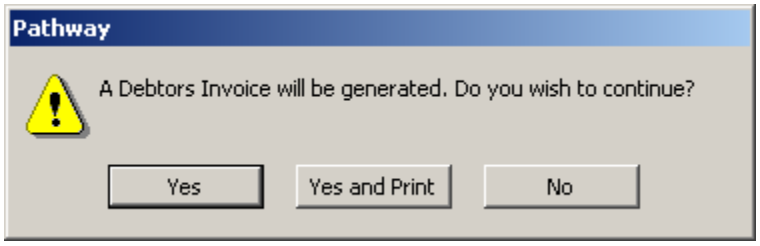
Name Maintenance Form

Linked to Debtors

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 Application 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 Application Number will be passed and displayed in the External Source field.
- The Module Code of LAP will be passed and displayed in the External Reference field.
- The Payment Reference (the TPK of the Application) will be passed and displayed in the Payment Reference field.
- The TPK of the Application will be passed and displayed in the Transaction Ref. field.
- 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 Applications 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.

Application

These two fields detail the number of the current Application 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 Application.

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 Application 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 Application 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.

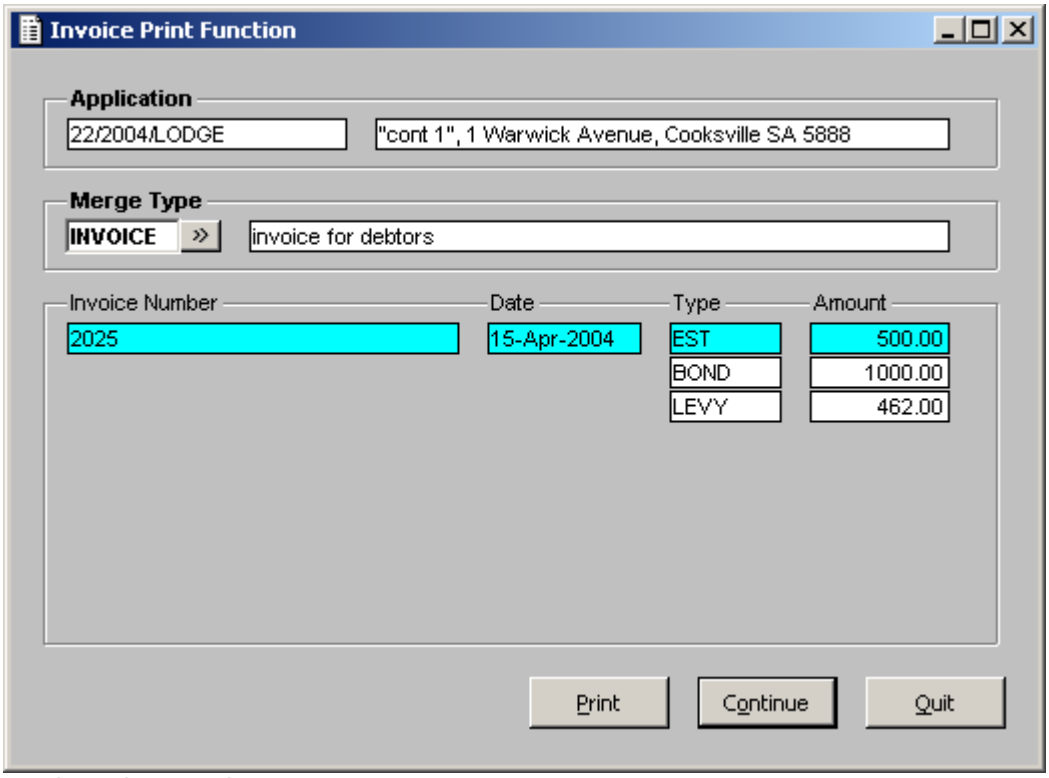
Invoice Print Function Form

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 Application. The Debtor will be used as the Document Addressee or if not a Debtors Application 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 be shown using the Letter option against the Name Role record within the Names Maintenance form within the Application. The Invoice is only available via the Letter Option.



Invoice Print Function Form

Application

These two fields detail the number of the current Application 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 know 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.

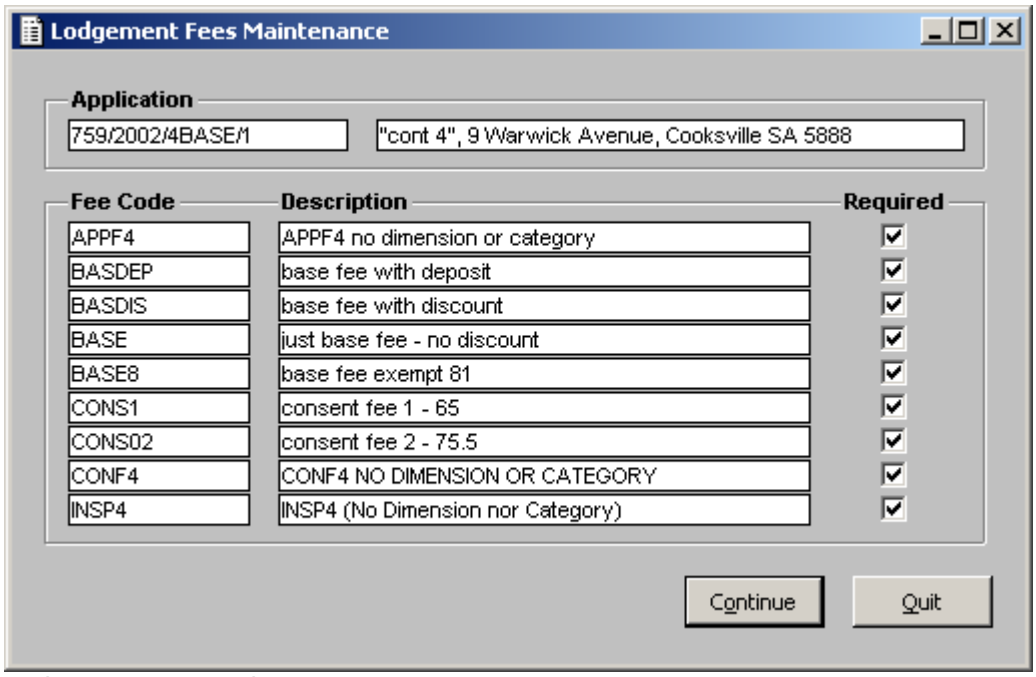
The Lodgement Fees Maintenance form can be used to load all Fees assigned in a Lodgement Option.

When this option is used, all Fees that are assigned to the Application 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 Application.

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

Application

These two fields detail the number of the current Application and its Primary 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 they 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 Application.

Deposits Retained

From the Fees Maintenance Form, the operator is able to Retain a Deposit.

This is required, when the terms of the Deposit are not retained and the Applicant is held responsible. The monies received for the Deposit are to be retained by Council and the funds transferred from the Deposit Account, which can be a Trust type account in some situations, and placed in general funds.

Using the 'Retained' Button and the Deposit Fee record, the system will prompt for the Amount to be 'Retained".

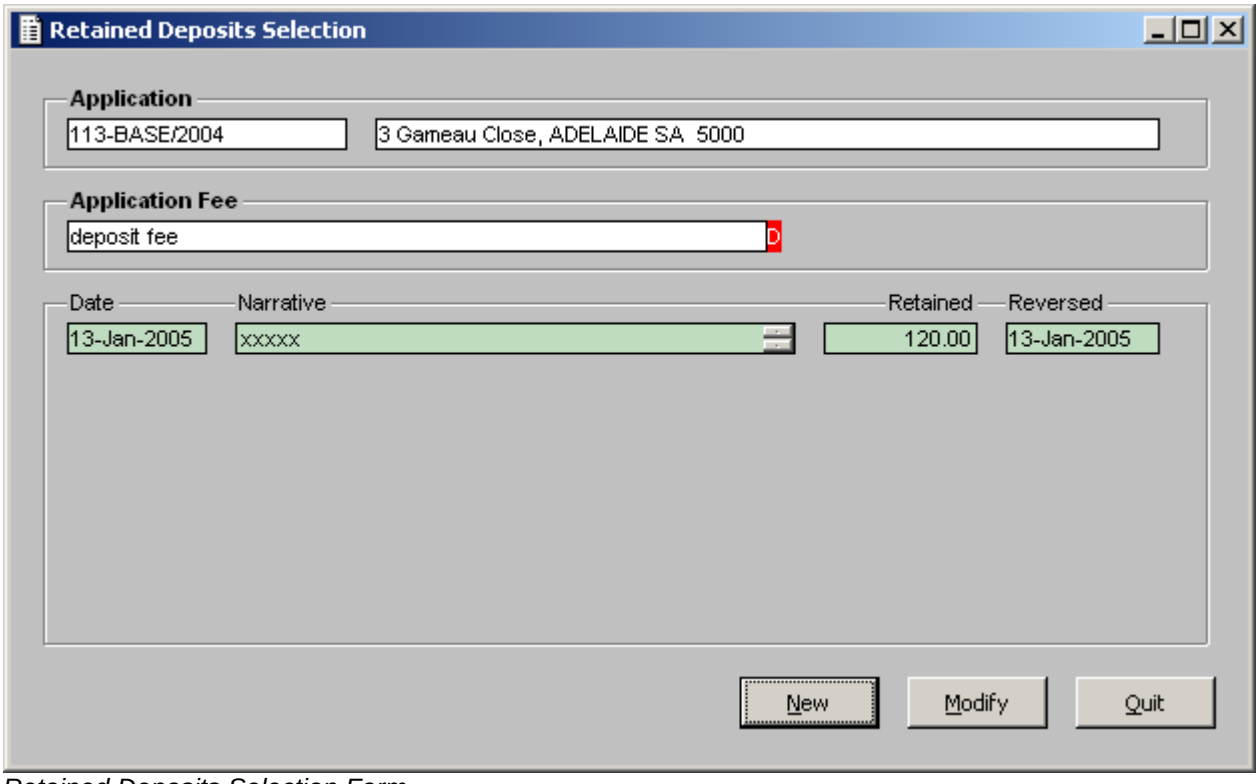
This will default to the Deposit Amount, however can be reduced, where only a partial Deposit amount is to be retained.

The Retained amount will be used for the relevant Accounting entries and will be displayed on the Fees Maintenance Form.

NOTE: Where a Deposit is partially 'retained' it is quite valid that the remaining funds are refunded.

Retained Deposits Selection Form

This 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

Application

These two fields detail the number of the current Application and its Primary Location.

Application 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.

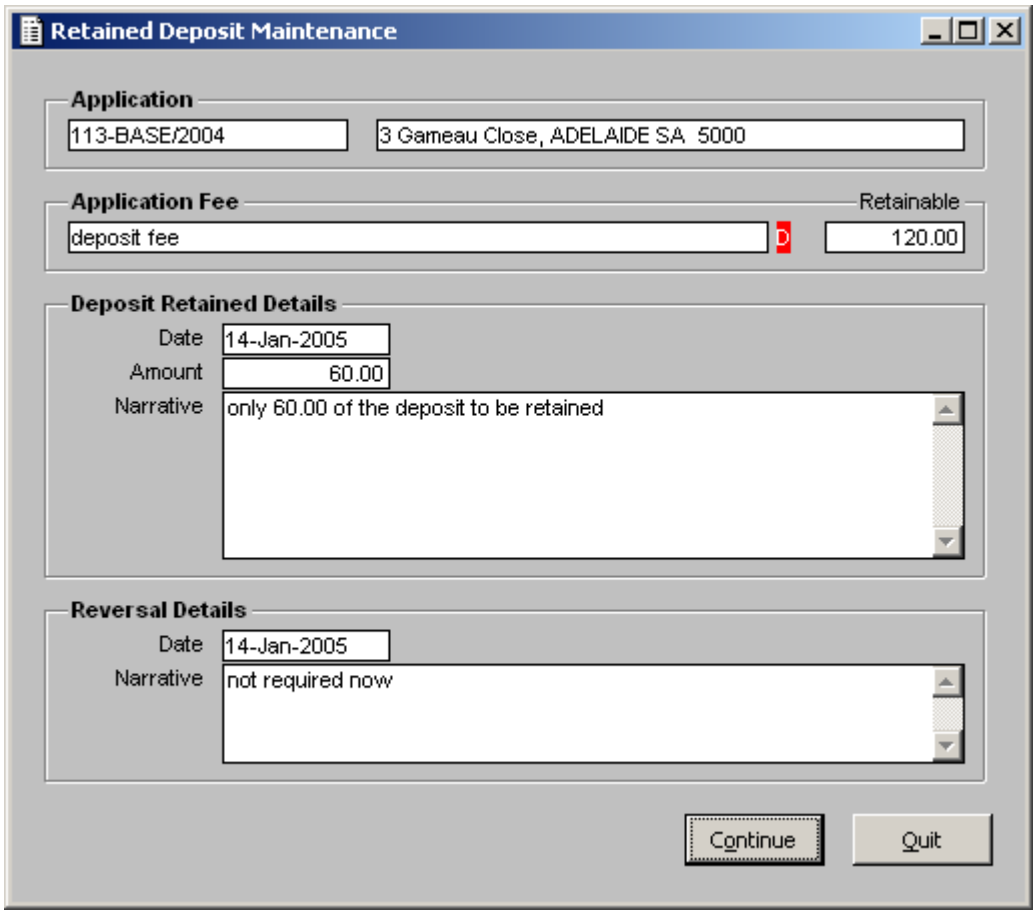
Reversed
This field displays the date that the Retained record was reversed.

Retained Deposit Maintenance Form

This form enable 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 the reduced amount in the Amount field, where only a partial Deposit amount is to be retained.

Once a Retained Deposit has been reversed then the Reversal Button is no longer available on this form.



Retained Deposit Maintenance Form

Application
These two fields detail the number of the current Application and its Primary Location.

Application 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 is created.

Deposit Retained Details - Amount
Enter the Amount of the fee that is to be Retained. This amount can be less than, but no greater than the amount Retainable.

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
This field is displayed once a Retained Deposit record has been reversed. The date and narrative of the reversal are displayed.

Reversal Details – Narrative
This field is displayed once a Retained Deposit record has been reversed. The date and narrative of the reversal are displayed.

Deposit Retained Reversal Form

The Deposit Retained Reversal Form is displayed when the Reversal Option has been taken from the Retained Deposit Maintenance Form.

Deposit Retained Reversal Form

Date
This field displays the Date that the Retained Deposit Fee was Reversed.

Narrative
This field is a multi line field allowing the User to enter a Description against the Deposit Retained Reversal record.

Refunds

A new Refund is created when 'New' is selected in Refunds Maintenance/Enquiry.

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 ie. Refund Date

Receipt Reversal and Transfers

Once a Receipt has been refunded, it cannot be reversed or transferred via Receipting, or transferred within Applications.

As such, the following rules will be put in place:

Receipt Entry

- Where a Receipt is selected for Reversal, that has an Application or Prepayment allocation line that has subsequently been Refunded via Prepayments, Application or Contribution Refunds, the validation routine will restrict the Reversal and present an appropriate error message.

- Therefore Users should go back to the Application into Fee Maintenance or Pre-Payment and Reverse the Refund or Retained Fees, this will then allow the Reversal of this money via the normal Receipting Reversal process.

- Where a Receipt allocation line is selected for Transfer and this line has been subsequently refunded in full, the Transfer validation will return an error message.

- Where a Receipt allocation line is selected for Transfer and this line has been partially refunded, the balance of the Receipt (after the Refund) is the only amount that can be transferred.

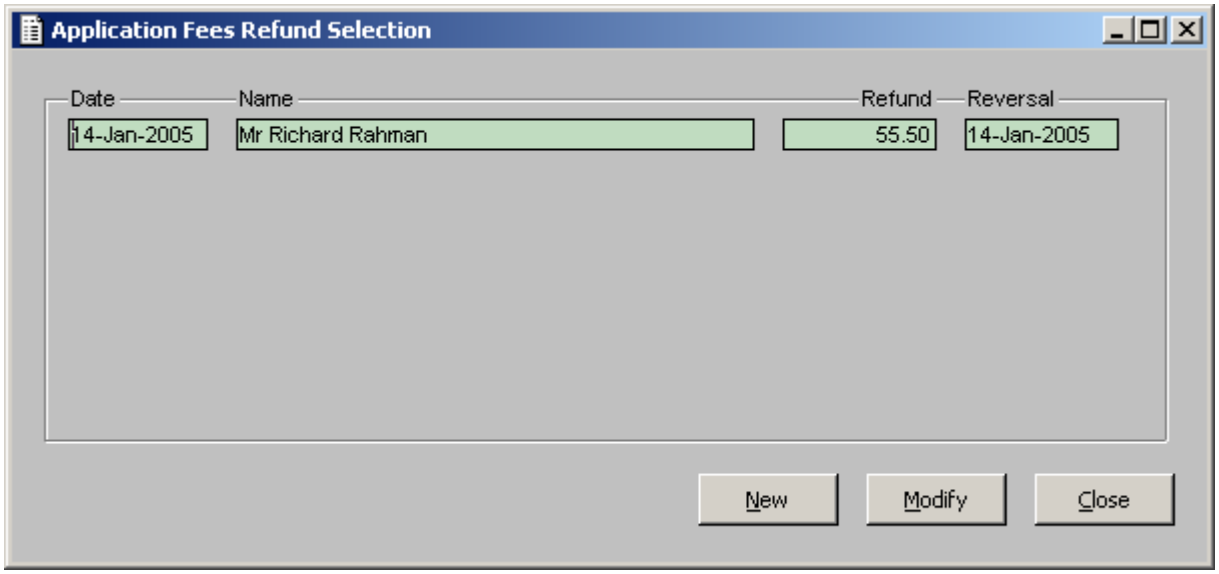
Application Fee Form Transfers

- No Receipt that has been fully refunded can be transferred to another Fee.

- A Receipt that has been partially refunded can have the balance transferred to another Fee.

Application / Contribution Fees Refund Selection Form

Selecting the Options menu or clicking on the Options Button from the Application Summary Form can access the Application/Contribution Fees Refund Maintenance Form. If a Refund has already been processed for an Application then the Fees Refund Selection Form is displayed to allow the User to either select the existing Refund entry or select the New Button to create a New Refund.



Fees Refund Selection Form

Date
The Date that the Refund occurred is displayed in this field.

Name
The Name of the Person or Company that received the Refund is displayed in this field.

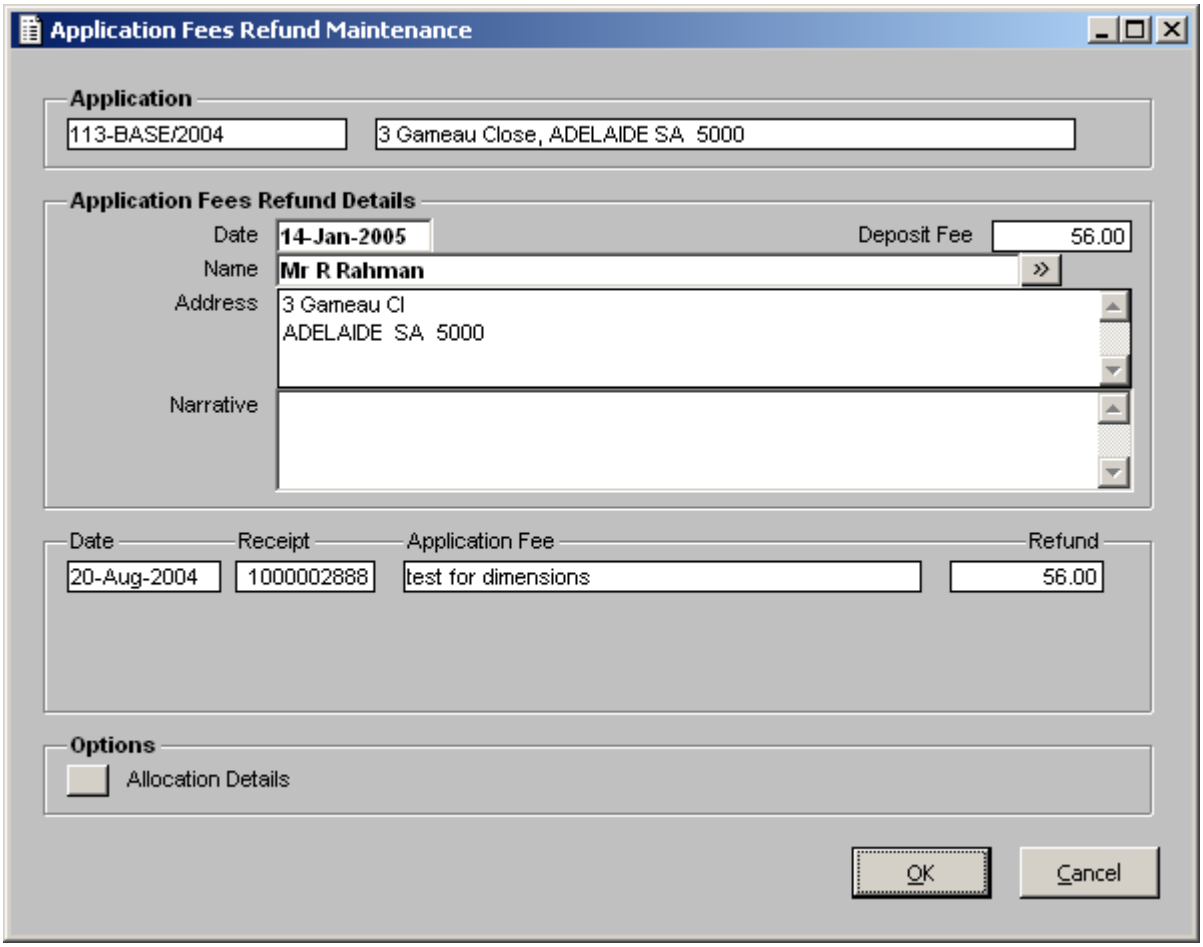
Refund
The Amount of the Refund is displayed in this field.

Reversal
If the Refund has been reversed then the Date of the Reversal is displayed in this field

If the Refund has not been reversed then this field is not displayed on the form.

Application / Contribution Fees Refund Maintenance Form

Selecting the Options menu or clicking on the Options Button from the Application Summary Form can access the Application/Contribution Fees Refund Maintenance Form. The Form consists of the following fields.



Fees Refund Maintenance Form

Application

These two fields detail the number of the current Application and its Primary Location.

Fees Refund Details - Date

This field displays the date of the Refund and will default to the System Date but can be overridden. This field is mandatory.

Fees Refund Details - Reversal

If the Refund has been reversed then the Date of the Reversal is displayed in this field. A Detail Button is available for the User to select to display the details of the Reversal.

If the Refund has not been reversed then this field is not displayed on the form and the Reverse Button is available on the bottom of the form.

Fees Refund Details – Refunded Amount

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.

Fees Refund Details - 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.

Fees Refund Details - Address

This field displays the Address for the selected name and cannot be maintained. This will default to the Address of the first Applicant but if the Name is changed by the User then it will reflect the new Name entered.

Fees Refund Details - 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.

Application Fee
This field displays the Application Fee Description.

Refund
This field displays the Amount of the Receipt.

Options - Allocation Details
Selection of this button displays the Refunds Receipt Selection form.

Reverse
The Reverse function will enable 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
- Any pre-payment that was Refunded will be reinstated 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-Payments/Overpayments Bank Account
Credit	Fee Revenue or Pre-Payments/Overpayment Account

The processing of a Reversal will require 'Additional Narrative' ie. Reason for the Reversal.

The Reverse Button is hidden once a Refund has been reversed.

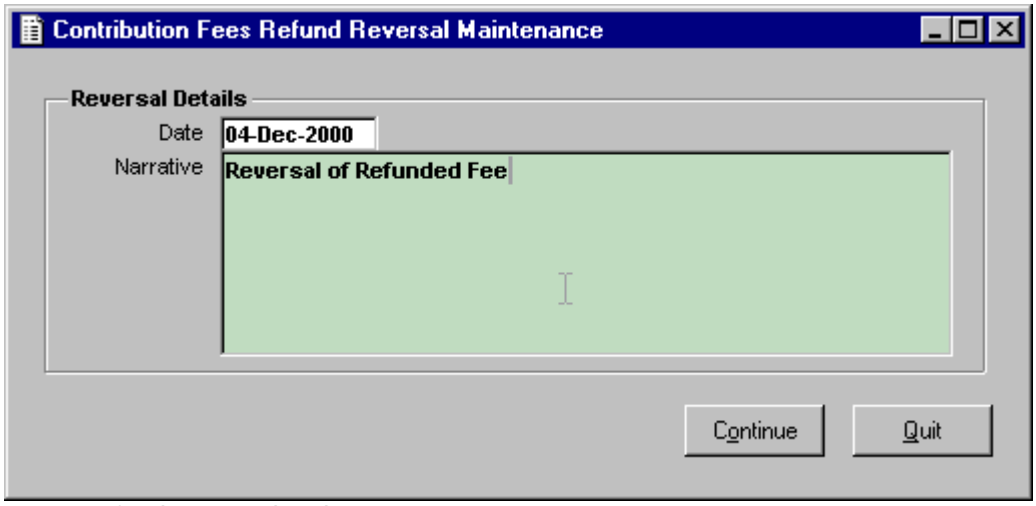
NOTE: Reversal or Refund will reverse the Ledger entries as above, however if a Cheque has been drawn, it is the responsibility of the Finance Department to manage the cancellation of the cheque.

Application / Contribution Fees Refund Reversal Maintenance Form

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, ie.:

Debit	Refund Clearing Account
Credit	System Bank Account
Debit	Fee or Pre-Payments/Overpayments Bank Account
Credit	Fee Revenue or Pre-Payments/Overpayment Account

Note: Reversal of Refund will reverse the Ledger entries however if Cheque has been drawn, it is the responsibility of Finance department and systems to manage the cancellation of the cheque.



Fees Refund Reversal Maintenance Form

Date

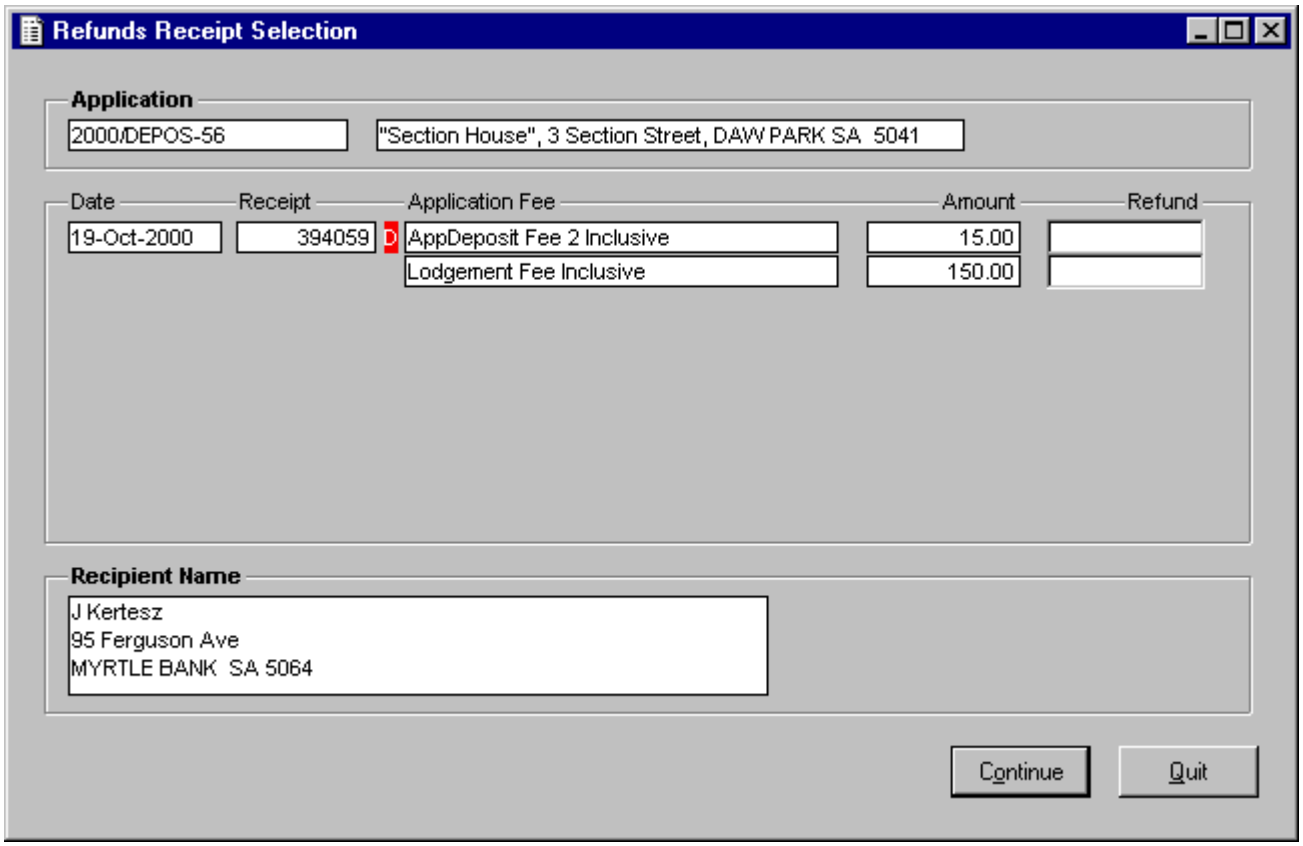
This field displays the Date that the Fee Refund was reversed.

Narrative

This field is a multi line field allowing the User to enter a Description against the Refund Reversal record.

Refunds Receipt Selection Form

The Refunds Receipt Selection form displays when the Allocation Option has been selected from the Refund Maintenance form. This form allows the selection of the required fee and the entry of the Refund amount for the fee.



Refunds Receipt Selection Form

Application

These two fields detail the number of the current Application 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 is display only and may not be maintained.

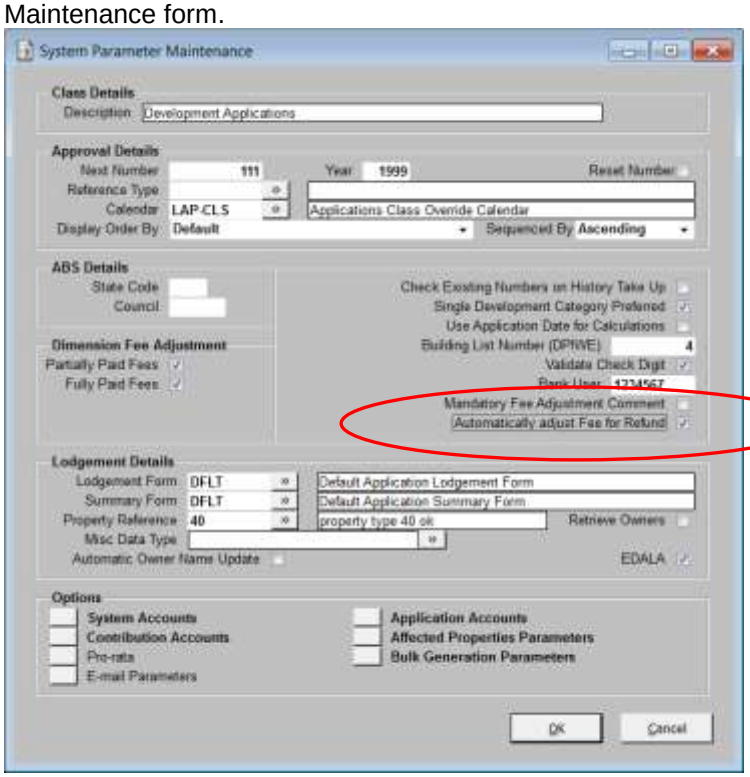
Application Fee
This field displays the Fee Description This field is display only and may not be maintained.

Amount
This field displays the balance available for refund. This field is display only and may not be maintained.

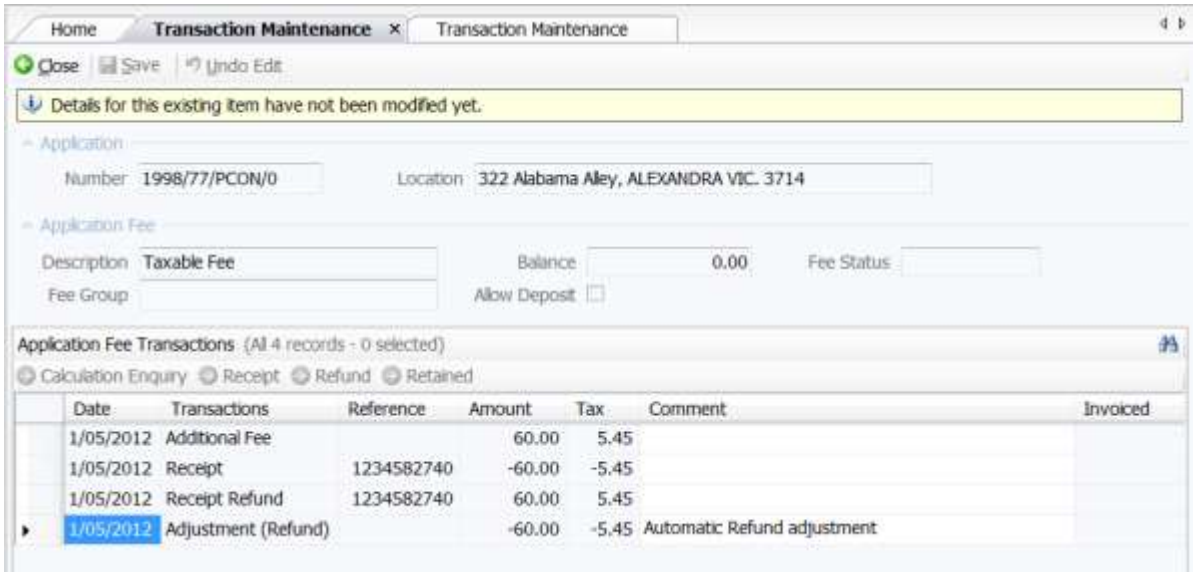
Refund
Enter the amount of refund required.

Recipient Name
This field displays the Recipient Name and Address details from the receipt details. This field is display only and may not be maintained.
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).

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 for the refund amount after having entered a Refund for that Fee.
This functionality is available in the Smart Client and the Thick Client for both refunds entered via Application Maintenance (via the Fees Refund or Contribution Fees options) 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.



When this parameter is checked and a Refund is entered for an Application Fee or for a Contribution 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:



If the parameter is not checked on entering a refund will leave the fee outstanding by the amount of the refund (original functionality).

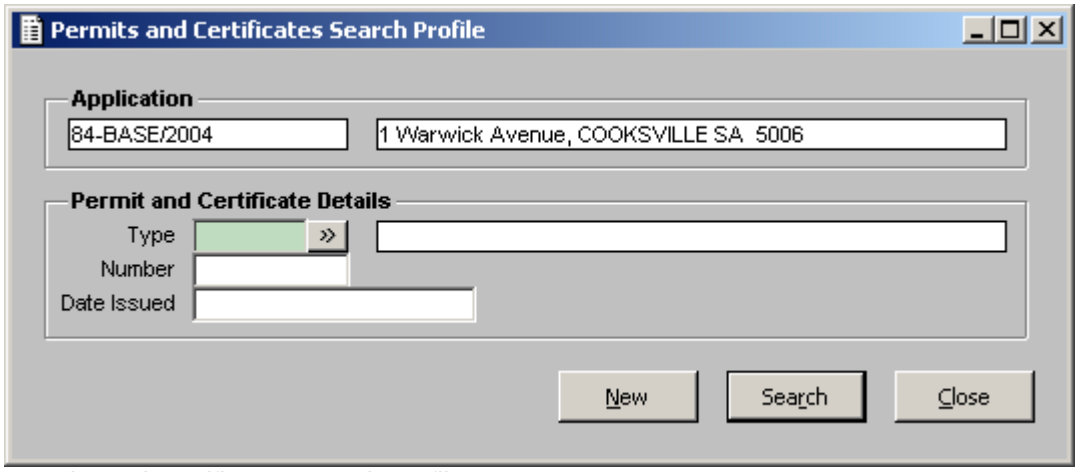
Permits & Certificates

Permits and Certificates may be added to Applications to allow the Applicant or a relevant party to proceed with the actual Development/Construction etc of the Application. A Certificate may also be produced as proof of certain Conditions or Data relating to an Application may be required in writing.

The Certificates and Permits are created originally in the Parameters setup for use within each Application. This Form also allows the User to add an Indemnity Insurance document to an Application and store Insurance information against the Application.

Permits And Certificates Search Profile Form

The Permits and Certificates Search Profile allows the User to Search for an existing Permit or Certificate, or create a new one. The form consists of the following fields.



Permits and Certificates Search Profile Form

Application

These fields detail the Application currently selected and it's Primary Location.

Permit - Certificate Details - Type

This field allows the User to key a Permit or Certificate Type if know, or click the Pop Up Button to select from a predefined list.

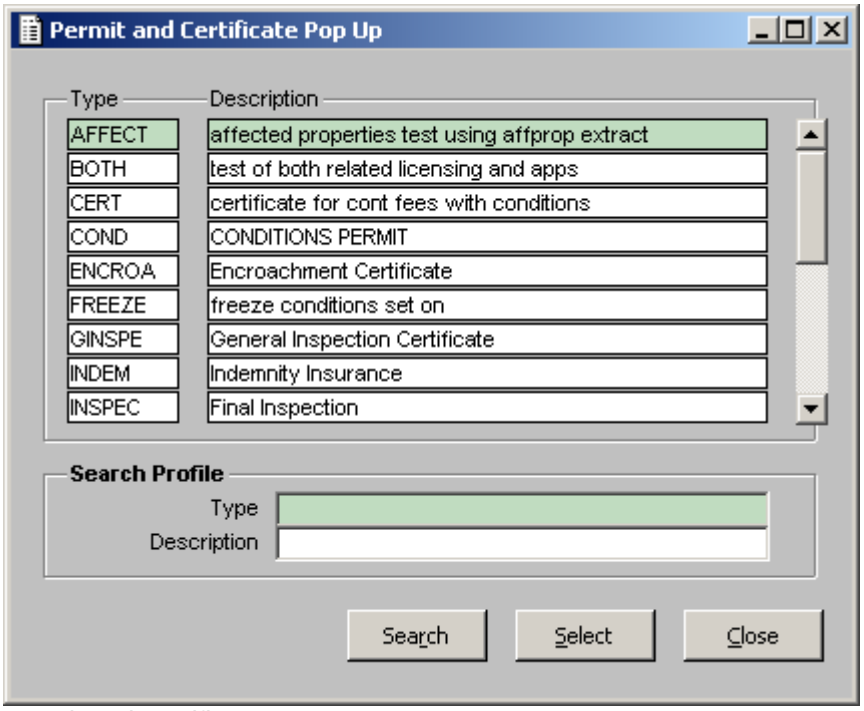
Permit - Certificate Details - Number

This field allows the User to enter a number assigned to an existing Permit or Certificate and click the Search Button to begin the Search.

Permit - Certificate Details - Date

This field allows the User to enter a date assigned to an existing Permit or Certificate and click the Search Button to begin the Search.

Permit And Certificate Pop Up Form



Permit and Certificate Pop Up Form

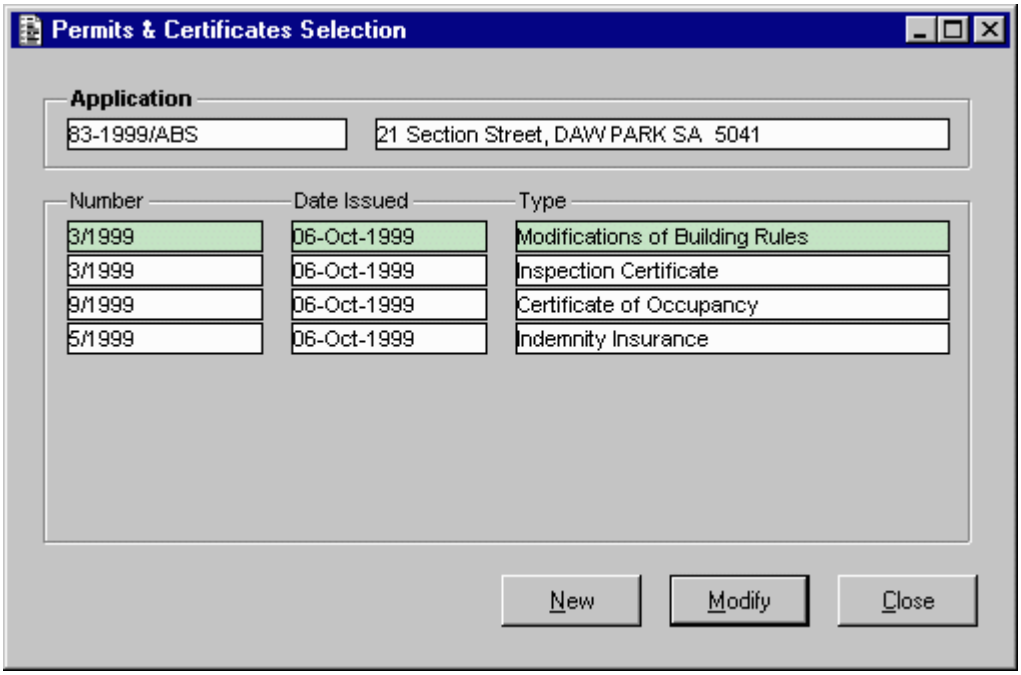
Type
This field displays a list of predefined Permit & Certificate Types. Highlight the one required, and click the Select Button to assign your Type.

Description
This field displays a list of predefined Permit and Certificate Descriptions.

Search Profile - Type
The Search Profile Type, allows the User to enter a Type and click the Search Button to produce a list of results based on that criteria.

Search Profile - Description
The Search Profile Description, allows the User to enter a Description and click the Search Button to produce a list of results based on that criteria.

Permits and Certificates Selection Form



Permits & Certificate Selection Form

Application

These fields detail the Application number selected and its Primary Location.

Number

This field details the Number of the Permit or Certificate or Indemnity Insurance . Each Permit and Certificate and Indemnity Insurance can have separate Numbering Systems therefore this list may include several types of Numbers.

Date Issued

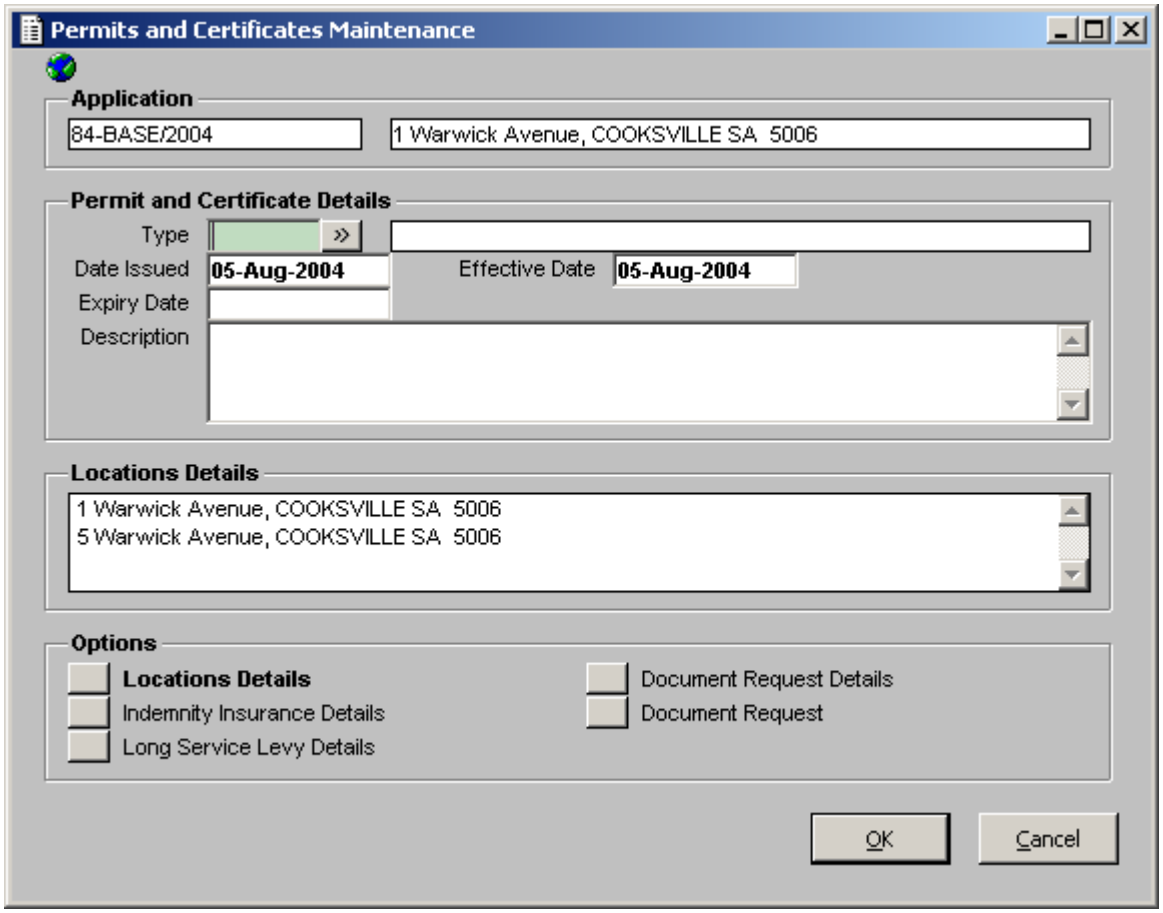
This field details the Date that Certificates or Permits or Indemnity Insurance were issued.

Type

This field displays the Type of Certificate, Permit or Indemnity Insurance was issued.
From this form the User is able to modify and existing Permit, Certificate or Indemnity Insurance or create a New document.
Once a Permit or Certificate has been created, modification to this document only allows for changes to the Locations and printing of the attached document. The form may not have it's type changed.

Permit And Certificate Maintenance Form

The Permit and Certificate Maintenance Form allows the User to generate or review Permits or Certificates for the Application.



Permit and Certificate Maintenance Form

Application

These two fields detail the actual Application Number and the description of its Location.

Permit & Certificate Details - Type

These two fields detail the Permit/Certificate Type and its full Description.

Permit & Certificate Details - Date Issued

This field details the actual date that the Permit/Certificate was issued.

Permit & Certificate Details – Effective Date

This field details the date that the Permit/Certificate is effective from.

Permit & Certificate Details - Number

This field details the Number that has been allocated to the Permit/Certificate. Each Permit/Certificate Type may have its own Numbering range and will increment as each Permit/Certificate is created.

Permit & Certificate Details – Expiry Date

This field details the date that the Permit/Certificate will or has expired on.

Permit & Certificate Details - Description

This field is a multi line field allowing the User to enter a Description against the Permit/Certificate.

Location Details

This field displays the Location Details that have been associated with this Permit/Certificate.

Options - Location

The Location Button details out to the Permit and Certificates Locations Maintenance Form. From this form the User can select or deselect the Locations that are applicable to the Certificate of Permit.

Options - Document Request Details

The Document Request Details Button when selected will display the Certificate or Permit that has been generated or requested. This option is only available when the Document Request Button has been selected and updated.

Options - Indemnity Insurance

If an Indemnity Insurance Type has been selected, this button may be selected. The Indemnity Insurance Certificate Maintenance Form will be displayed.

Options – Document Request

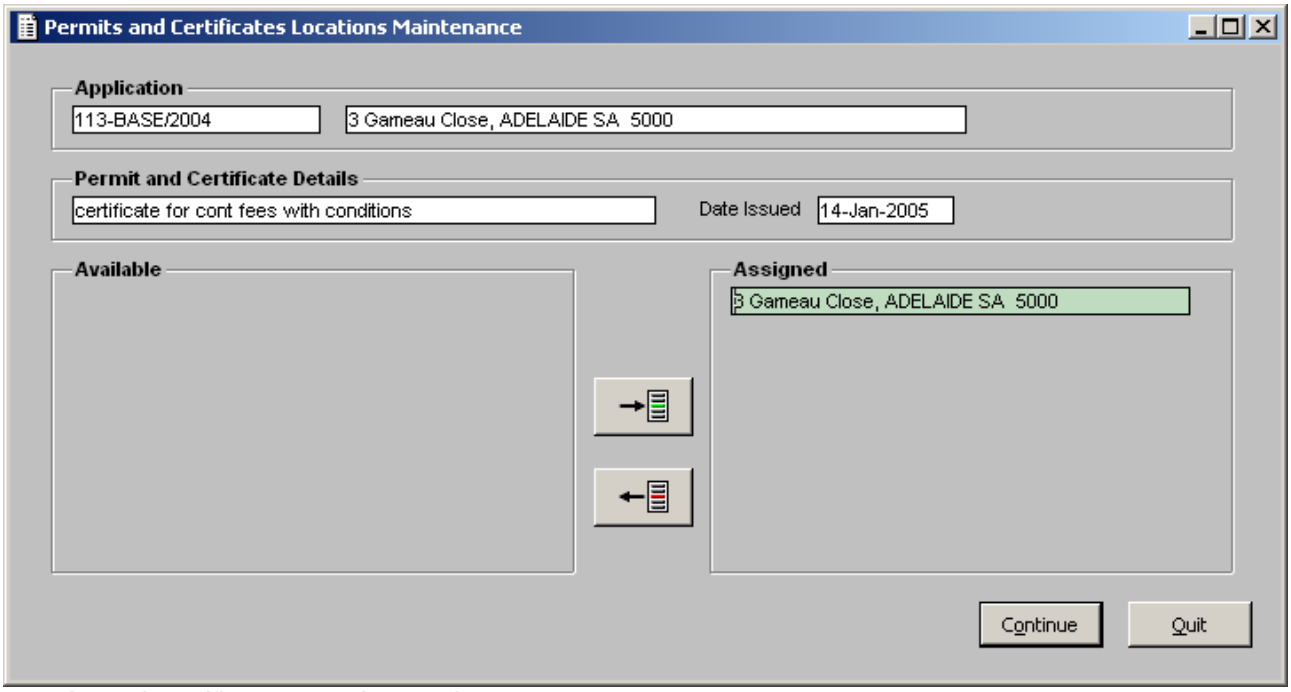
The Document Request Button allows the User to nominate the Document to be generated. Upon selecting this Option the User is presented with the Assign Names form where they can select the names that are to be used for the documentation and then the Document Request information and Merge Type can be updated and the document generated.

Options – Long Service Levy Details

If a Long Service Levy Type has been selected, this button may be selected. The Long Service Levy-Certificate Maintenance Form will be displayed.

Permits and Certificate Locations Maintenance Form

The Permit and Certificate Locations Maintenance Form is displayed when the User selects the Options Button from the Permits and Certificates Maintenance Form. This form shows the available Locations for the Applications and allows the User to nominate the Locations that are to be used for the generation of the Permits or Certificates. The User is able to use the select or deselect buttons to assign the required Locations. Upon entry to the form the Primary Location is automatically assigned as the Location to be used. This can be changed by the User.



Permits and Certificates Locations Maintenance Form

Application

These two fields detail the actual Application Number and the description of its Location.

Permit and Certificate Details and Issued Date

The Details of the Permit or Certificate is displayed in this field.

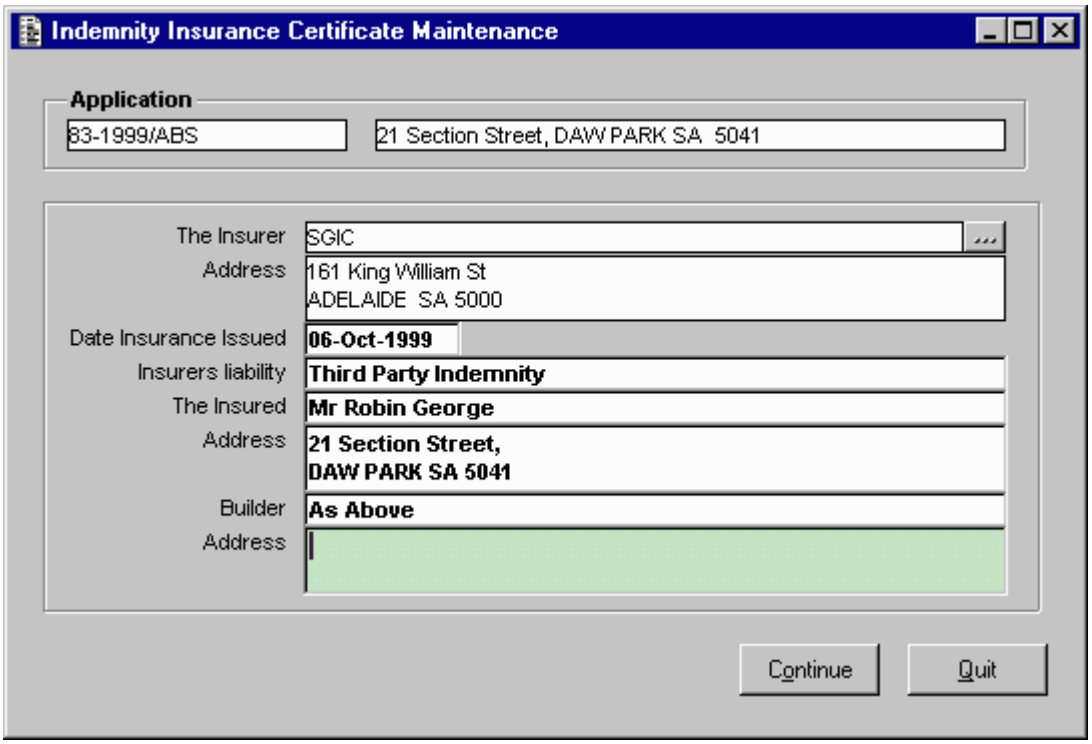
Available

Locations that are assigned to the Application are displayed in this area. Upon first entering this form the only Location that will appear in the Assigned section will be the Primary Location of the Application. The User is able to assign Locations from the Available Section by using the Select Button.

Assigned
Locations that are assigned to the Application are displayed in the Available area. Upon first entering this form the only Location that will appear in this Section will be the Primary Location of the Application. The User is able to assign Locations from the Available Section by using the Select Button.

Indemnity Insurance Certificate Maintenance Form

The Indemnity Insurance Certificate Maintenance Form allows the User to enter specific details regarding Indemnity Insurance.



Indemnity Insurance Certificate Maintenance Form

Application
These two fields detail the actual Application Number and the description of its Location.

Permit and Certificate Details
The Details of the Permit or Certificate is displayed in this field.

Permit and Certificate Details - Date
The Date field reflects the Issue Date of the Permit or Certificate.

Indemnity Insurance Details - The Insurer
This field details the name of the Person who is actually providing the Insurance.

Indemnity Insurance Details – The Insurer Detail Button
This Button when selected will take the User to the Name Selection Maintenance Form. The User may then select a Name from the list or if the appropriate authority options are assigned to the User, they may add a Name.

Indemnity Insurance Details – Insurer Address
This field details the Address of the Insurer.

Indemnity Insurance Details - Date Insurance Issued
This field displays the date the Insurance was issued. The User may place their cursor in the field and either key a date into the field, or double click with the left mouse button to have a Calendar Pop Up presented.

Indemnity Insurance Details - Insurers Liability

This field allows the User to enter the information regarding the Liability of the Insurer. This is usually a dollar value.

Indemnity Insurance Details - The Insured
This field details the name of the Person that is to be insured.

Indemnity Insurance Details – The Insured Address
This field details the actual Address of the Person Insured.

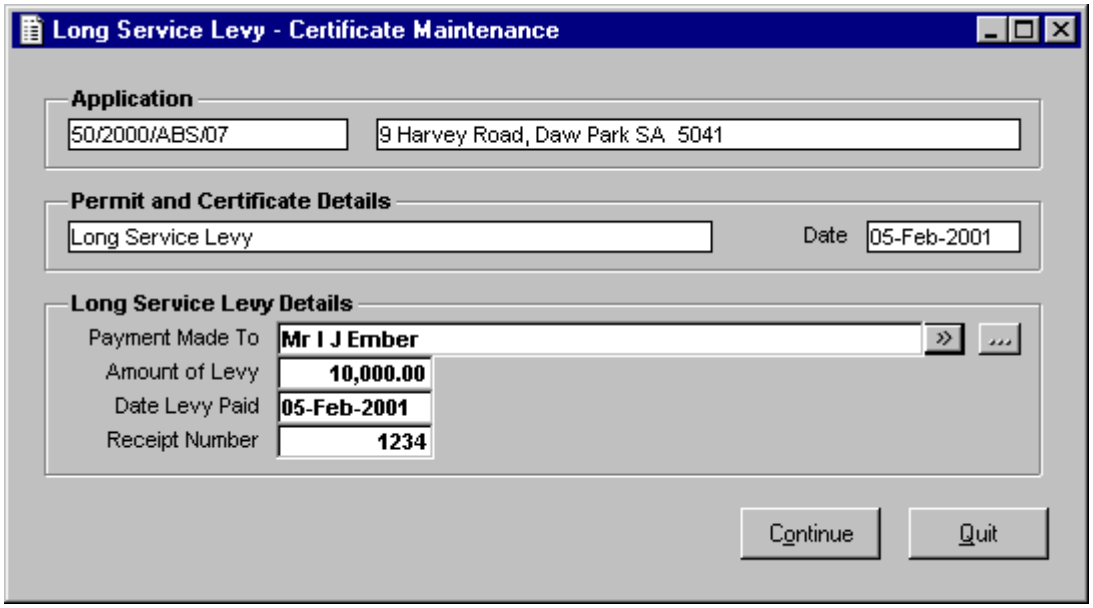
Indemnity Insurance Details - Builder
This field allows the User to enter the name of the Builder responsible for the Application.

Indemnity Insurance Details – Builder Address
This field is allows the User to enter the Address of the Builder responsible for the Application.

Indemnity Insurance Details – Narrative
This field is allows the User to enter the Address of the Builder responsible for the Application.

Long Service Levy - Certificate Maintenance Form

The Long Service Levy – Certificate Maintenance Form allows additional Long Service Levy details to be added to a certificate. Only one Long Service Levy record is allowed per certificate.



Long Service LevyCertificate Maintenance Form

Application
These two fields detail the actual Application Number and the description of its Location.

Permit and Certificate Details
These two fields detail the Certificate Type and the Date the Certificate is raised.

Long Service Levy Details – Payment Made To

This field allows for the selection of a Name from the Name and Address Register by entering a name or using the PopUp to select a name.

The Detail button will display the Personal Name Maintenance Form for the Name selected.

Long Service Levy Details – Amount of Levy
This field displays the Amount of the Long Service Levy. This field is a 10 character alpha/numeric field

Long Service Levy Details – Date Levy Paid

This field displays the Date the Levy was paid.

Long Service Levy Details – Receipt Number
Manually enter a Receipt Number as the receipt is paid external to the Council. This field is a 10 character alpha/numeric field.

Assign Names for Document Request Form

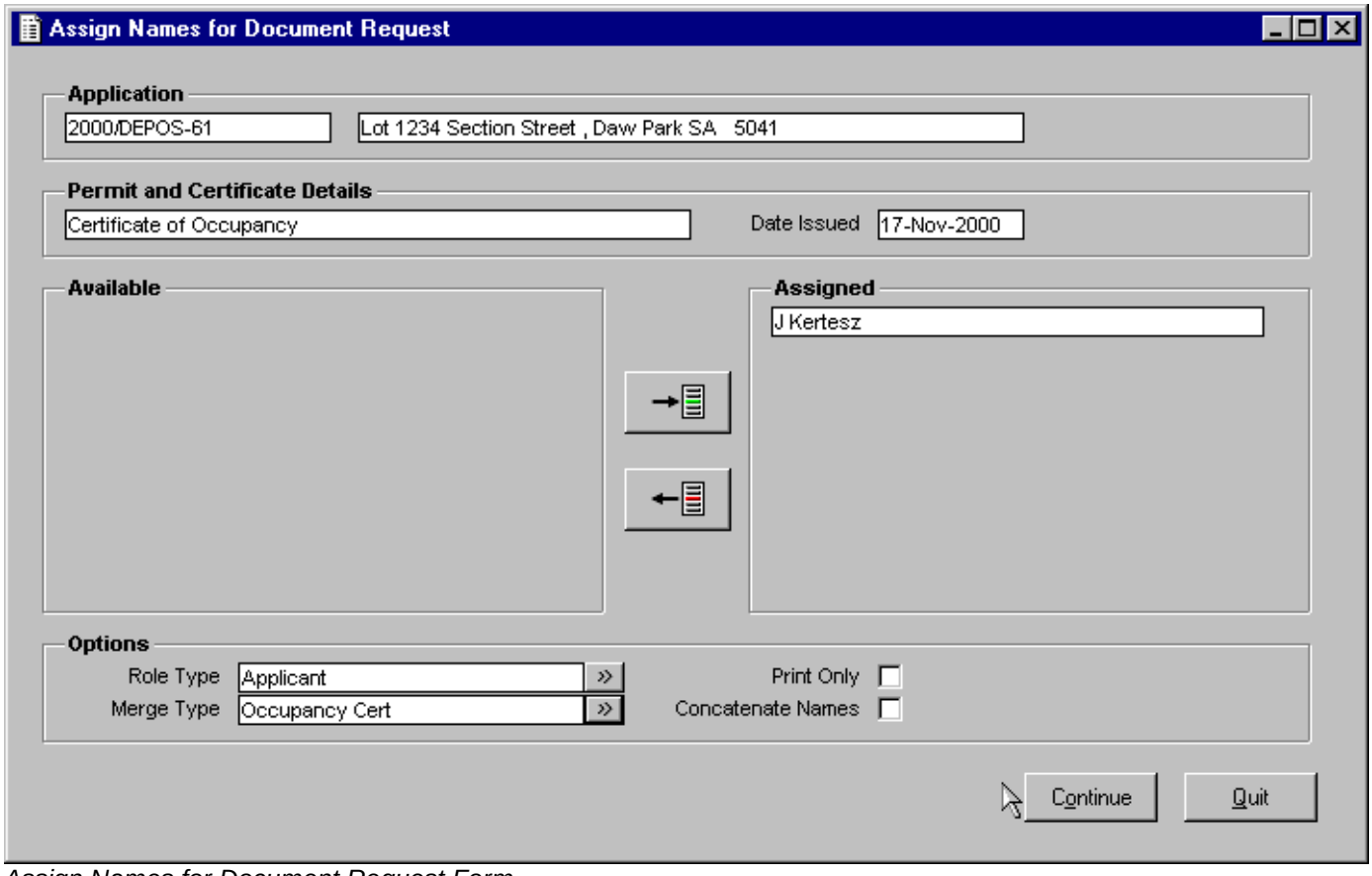
The Assign Names for Document Request Form will be same when creating Documents for either a Permit or Certificate.

When the form is presented to the User, the default Role Type displayed is of the Applicant. On the right hand side of the form all Applicant Names whether there is one or many will be assigned.

If the Document is not for all of the Applicants or relevant roles, simply highlight the name and de-assign the names not required.

If it is not the Applicant you wish the Document to be assigned to, use the Pop Up button at the end of the Applicant Role and select from one of the other valid Application Role Types.

When another role type is selected the Names assigned on the right hand of the form will display as peer the names assigned in the Names Maintenance Form.



Assign Names for Document Request Form

Application

These two fields detail the actual Application Number and the description of its Location.

Permit and Certificate Details

These fields detail the Permit and Certificate Description and the Date issued.

Available

This section displays the names available to be assigned for the selected Role Type.

Assigned

This section displays the names assigned for the document.

Options – Role Type

The Role Type of Applicant will default into this field. However if the document is to be sent to another Role Type the Pop Up button may be used to select another Role Type.

Options – Merge Type

Where a Merge Type has been assigned at the Parameter level, this will automatically be defaulted in the Merge Type Field. However if the User does not wish to send this particular document for this particular Permit or Certificate the Pop Up button may be used to select from .other Merge Types.

Options – Print Only

The Print Only check box will immediately create the document for the Merge Type selected and does not take the User to the Document Request screen to change or add any details once the User selects the Continue button.

It is recommended that this is only used for a merge type similar to a Cover or Summary Sheet as fields such as Document Applicant Address or Document Applicant Name will not print. The Applicant Name and Address fields will populate but not the Document Applicant Name and Address as no name has been selected.

Options – Concatenate Names

The Concatenate Names check box will combine all of the Names for the Role Type selected so that the document will only addressed to the first few names followed by “and others”. If the Concatenated Names box is not checked on then a document request will be created for each name separately.

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 Application.

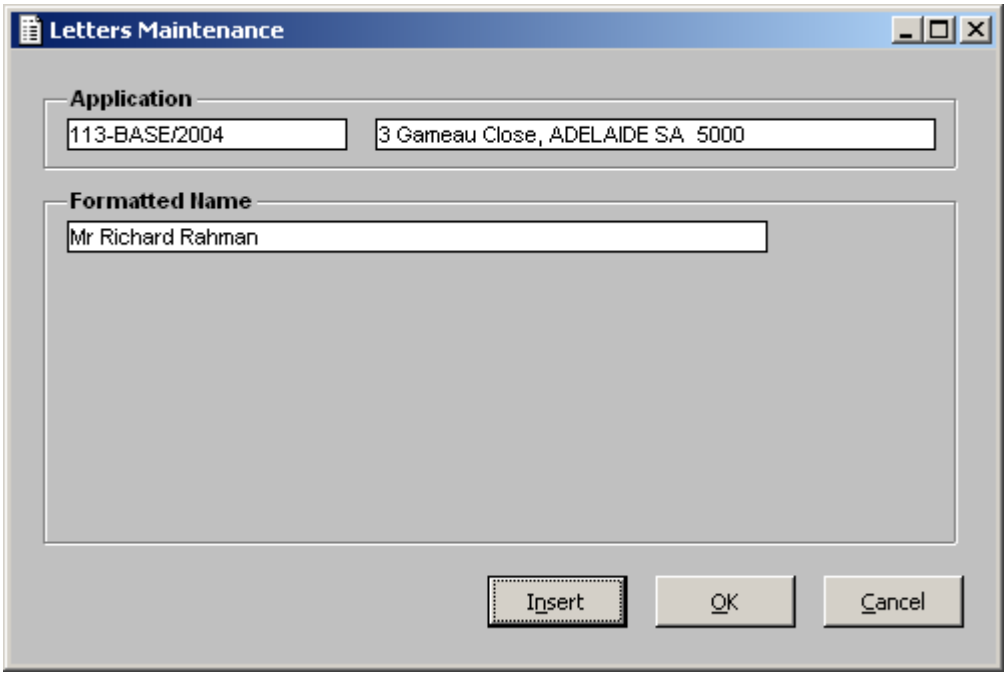
Letters are originally created as part of the Parameter setup, and may be selected as an Option within the actual Application.

The first form presented is a Search Profile form allowing the User to create a new Letter of the Application, or Select a previously create 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:

Letter Maintenance Form

The Letter Maintenance Form allows for the selection or nomination of the Name of the Person or Organisation that is to receive a Letter.



Letter Maintenance Form

Application

These two fields detail the actual Application 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.

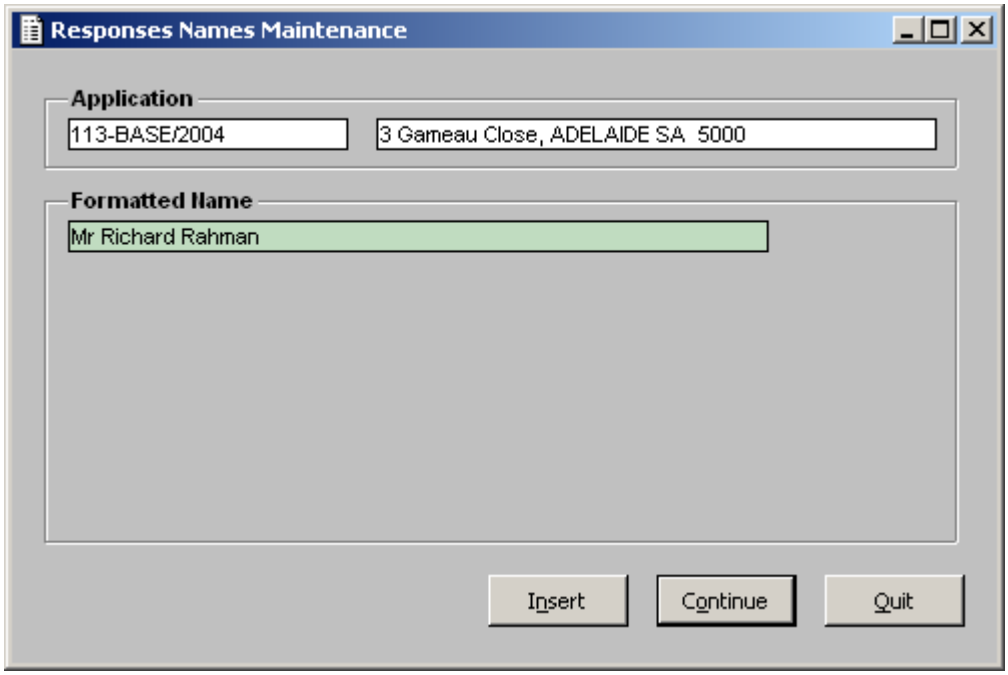
These forms are Word Processing forms and the Selection and Maintenance of these forms is detailed in the Word Processing Manuals.

Responses

The Responses option is used to record any Responses received from customers that have not had a document issued via the applications system. They are recorded by Response Type ie. Oppose Development, Require Representation etc, Response Date and a free format field for a Summary of the Response.

Response Names Maintenance Form

The Response Names Maintenance Form is designed to allow names to be added to a particular Application and their Response details entered.



Response Name Maintenance Form

Application

The Application field consists of two parts, the left hand side being the actual Application Number selected, and the right hand side showing the Location of the Application.

Formatted Name

The Formatted Name field is used to detail the actual name of the person who is making the Response.
A Name can be added to this field, by clicking on the Insert button. This details out to the Name Selection Maintenance. Once a Name has been selected, this form will be re-displayed with the appropriate name listed. Further names may be added by repeating the above step.
Once Names are selected, click on the Continue button. This will then display the Response Maintenance Form.

Response Maintenance Form

The Response Maintenance Form details the person responding to the Application and allows for a Response to be added, together with a Summary of Response.

This form may show two different types of Responses. The first being where a Response is received in reply to a letter forwarded to the Respondee.

When their Response is received, the Response details may be entered against the actual letter itself.

This form would then have the name of the letter sent displayed in the Letter Details Field. The Detail button would then be highlighted for access.

When a Response to an Application is received from a source other than for instance Affected Properties, the Response is entered, but there would be no details in the Letter Details field, and the Detail button would not be available.

For Example: A Response may be received from a member of the General Public who happened to see a Notification of the Application in a local paper, or heard about it.

The person may then contact the Council and wish to Respond to the Application, whether it be for or against the Application.

Response
Each Response requires a Response Code assigned to it. The Response Code may be keyed directly into the field if know, or the Pop Up Button may be clicked to select from the pre-defined list.

Response Date
The Response Date will default to Today's date but may be modified.

Summary of Response
The Summary of Response field may used to key in details of the Response. This is a multi lined field.

Further Responses may be added to this Application by clicking the Insert Button.

Development Categories

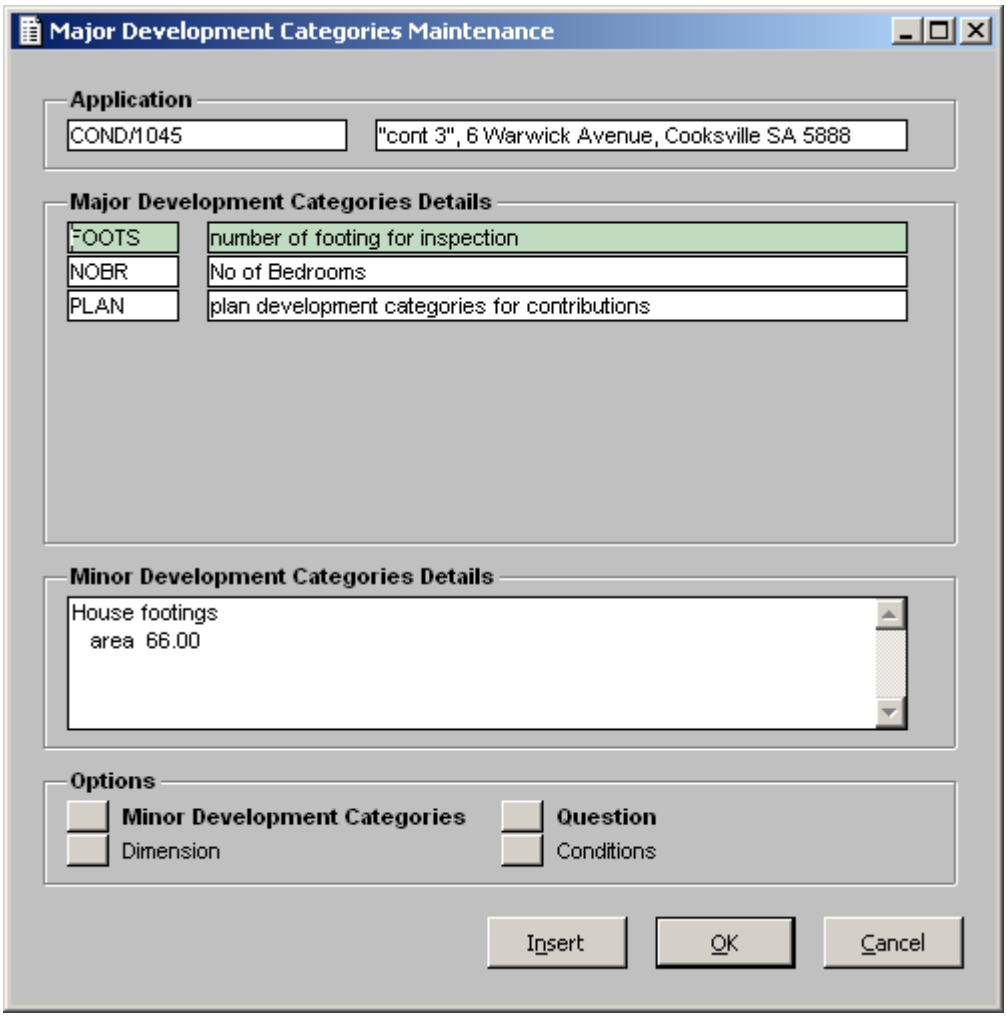
This option allows the recording of Development Categories if appropriate. These Categories are as follows:

Major Development Categories
Major Development Categories may be used to further describe an Application. The Categories may be used for reporting and statistical purposes. These categories are User definable and may be used to identify Applications that may be of a Residential, Industrial or Recreational Category.

Minor Development Categories
For each Major Development Category, an unlimited number of minor categories may be established. For example the Major Development Category of “Residential” may have minor categories such as “Single Dwelling”, “Swimming Pool”, “Pergola”, “Unit”, “Townhouse” and so on.

Major Development Category Maintenance Form

The Major Development Category Maintenance allows large types of Development 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 Development Categories Maintenance Form

Application

The Application field details the current Application Number and type in the left hand side box, and the right hand side box details the actual location of the Application.

Major Development Categories Details

The Major Development Categories Detail section displays the Major Development Categories that have been assigned to the Application. As the User put focus on each entry so the information in the Minor Development Categories Details section will change to reflect the entry being focused on. If another Major Development Category is to be added to the Application then the User needs to select the Insert Button to display a list of valid Major Development Categories that can be selected.

Minor Development Categories Details

The Major Development Categories Detail section displays the Major Development Categories that have been assigned to the Application. As the User put focus on each entry so the information in the Minor Development Categories Details section will change to reflect the entry being focused on. The Minor Development Categories Detail Section will display all the Minor Development Categories that are assigned to the individual Major Development Category.

Options – Minor Development Categories

Selecting the Minor Development Categories Option Button will display the Minor Development Categories that have been assigned to the Major Development Category selected or allow the User to add a Minor Development Category for the Major Development Category.

Options - Question

Where a Question or Questions have been defined within the Major Development 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 - Dimensions

Selecting the Dimensions Option Button will display the Development Categories Dimension Maintenance Form showing the information that has been defined further down in the Minor Development Categories Forms.

Options – Conditions

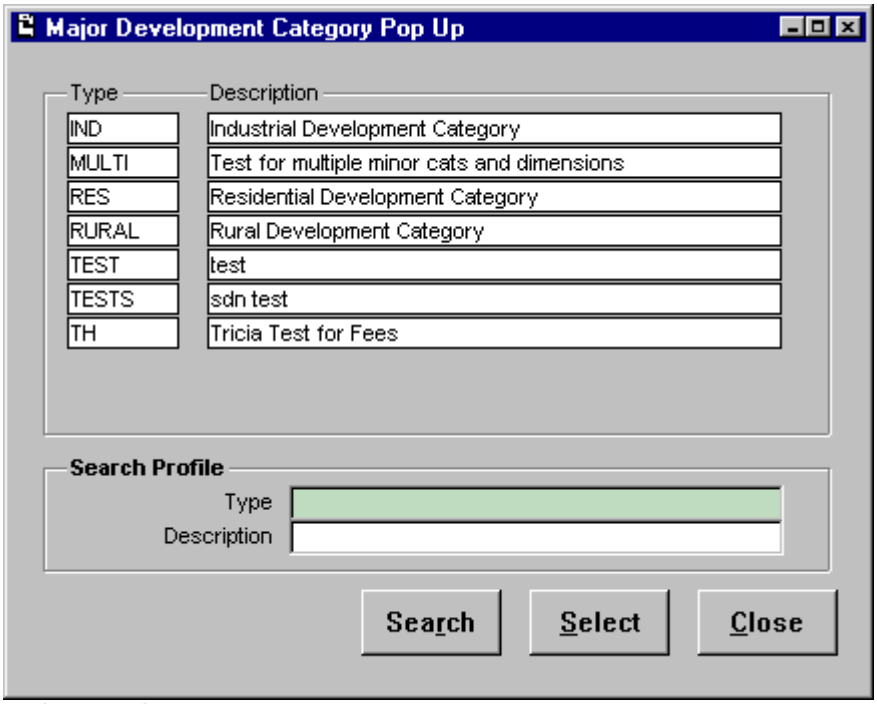
Pressing this button will display any Conditions that have been loaded for the Major DevelopmentCategory. If this Option is not shown then there are no Conditions associated to the Major Development Category.

If the Major Development Category is being ‘Added’, then the Condition Option is not shown. The Option is only available when viewing a Major Development Category in maintenance mode.

NOTE: - When these Major Development Categories are used in Application Maintenance, in Application Entry, Change Application Type or inserting a new Fee, the assigned Condition will be loaded onto the Application. The system will check for existing Standard Conditions and these Major Development 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 Development Category Pop Up Form

The Major Development Category Pop Up allows for the selection of pre-defined Major Categories.



Major Development 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.

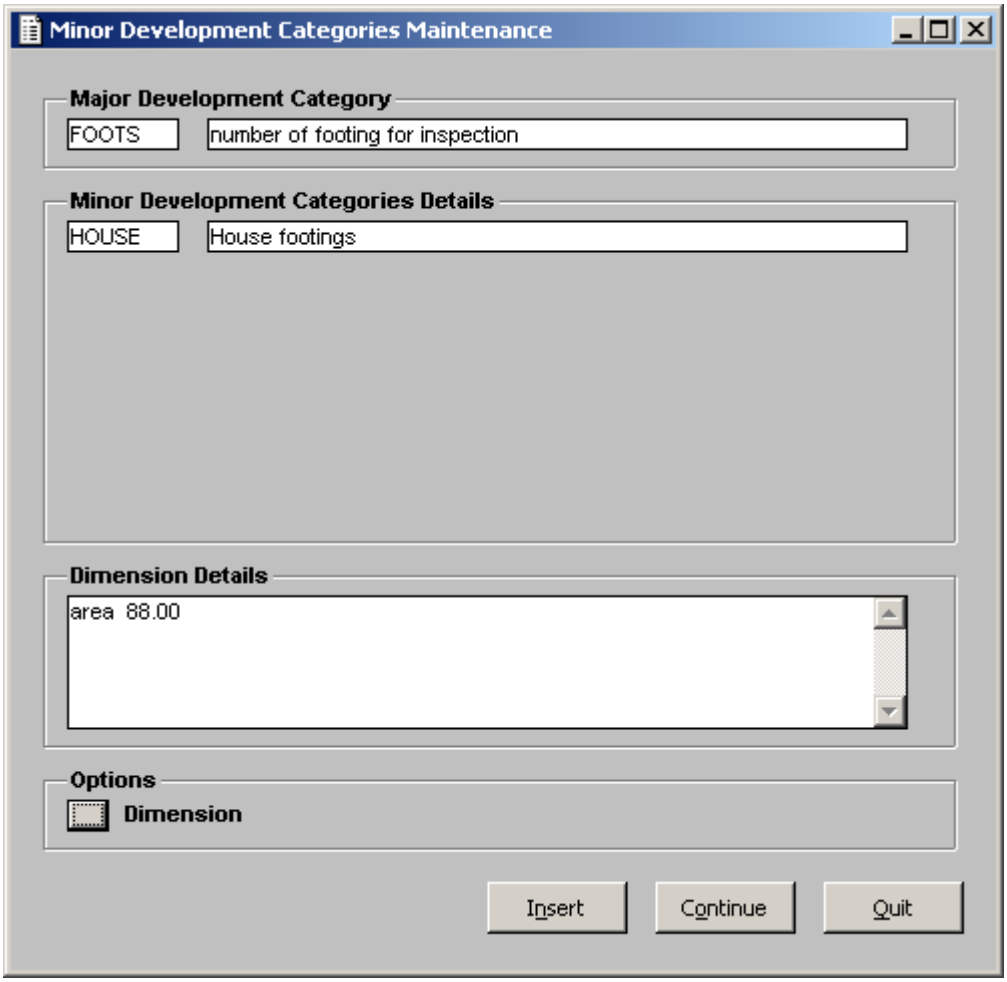
Search Profile - Type
The Search Profile may be used to “narrow” the list of Major Categories.
The Type field is used to enter a code or part of the code for a Category. A Description may also be entered, or the Search button clicked to begin the Search.

Search Profile - 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
Once a Major Development Category has been selected, the Options field now displays a further button. This Button being the Minor Development Category. Clicking on this button Displays the Minor Development Category Maintenance form.

Minor Development Category Maintenance Form

The Major Development Category Maintenance allows large types of Development to be grouped together with Minor Categories attached to it. The Minor Development Categories Maintenance Form allows for the selection of the appropriate Minor Categories for the Major Category that has been previously selected.



Minor Development Categories Maintenance Form

Major Development Category

The Major Development Category displays the Code and Description of the Major Development Category that is currently being maintained and which will have the Minor Development Categories assigned to it.

Minor Development Categories Details

As the Minor Development Categories are assigned to the Major Development Category they will appear in the Minor Development Categories Detail Section. Focusing on the the Minor Development Category Entry will then allow the selection of the Dimension Option button to assign the applicable Dimension for the Minor Category.

Dimension Details

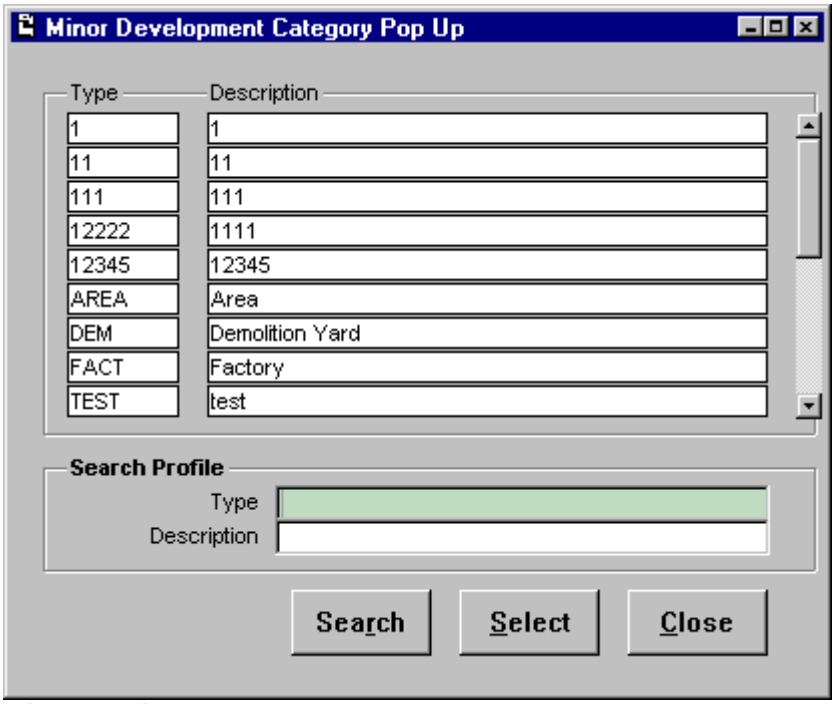
The Dimension Details section of the form displays the Dimension information that has been assigned to the Minor Development Category that currently has focus. As the focus is moved from one Minor Development Category Entry to the next so the information in this field will be changed to reflect the Dimension information associated to the focused Minor Development Category.

Options - Dimensions

Selecting the Dimensions Option Button will display the Dimension information that has been assigned to the Minor Development Category that currently has focus. From this form the User is able to adjust or add further information for the Dimensions.

Minor Development Category Pop Up Form

The Minor Development Category Pop Up allows for the selection of pre-defined Major Categories.



Minor Development 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.

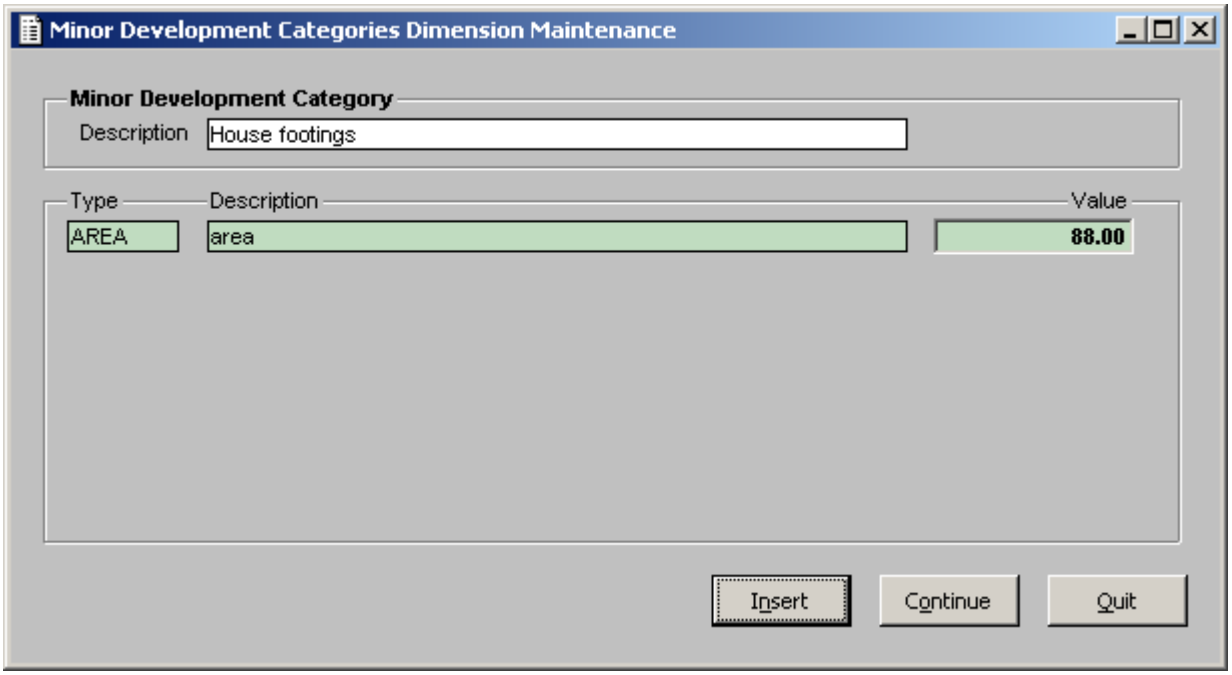
Search Profile - Type
The Search Profile may be used to “narrow” the list of Minor Categories.
The Type field is used to enter a code or part of the code for a Category. A Description may also be entered, or the Search button clicked to begin the Search.

Search Profile - 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 Development 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 Development Categories Dimensions Maintenance Form

The Minor Development Categories Dimension form allows for the addition of a Dimension type and an associated value. The form consists of the following fields:-



Minor Development Categories Dimension Maintenance Form

Minor Development Categories - Description

The Description Field is the detailed Description given to the predefined code.

Type

The Dimension Type field displays the Type that has been assigned to the Minor Development Category that was selected. If further Dimension Types are to be added then the User needs to select the Insert Button to display a list of available Dimension Types.

Description

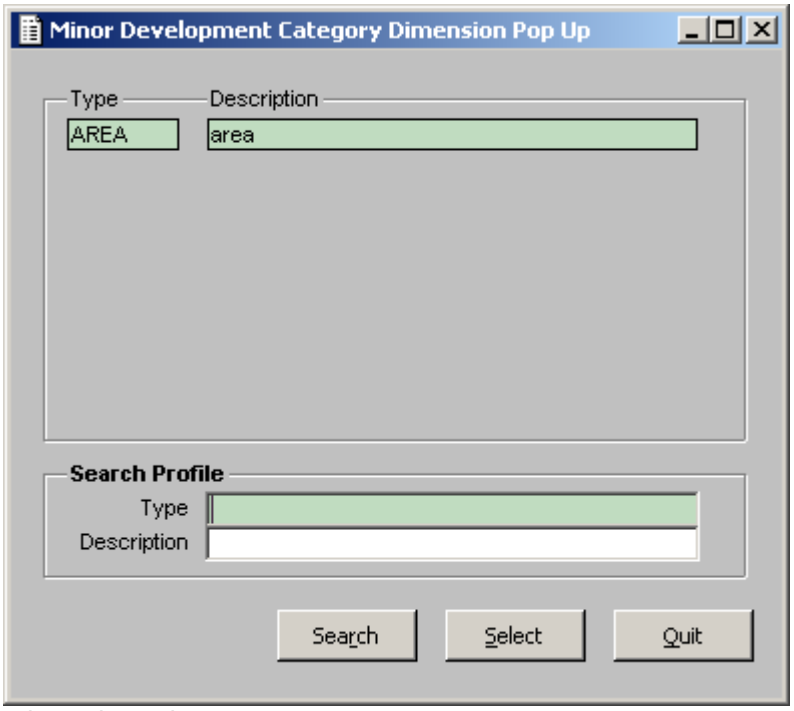
Once the Type is selected its full description will be displayed in this field.

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 Dimension Category Pop Up Form

The Minor Dimensions Category Pop Up allows for the selection of pre-defined Minor Dimension.



Minor Dimension Category Pop Up Form

Type
This field details the code assigned to the Minor Dimension Type.

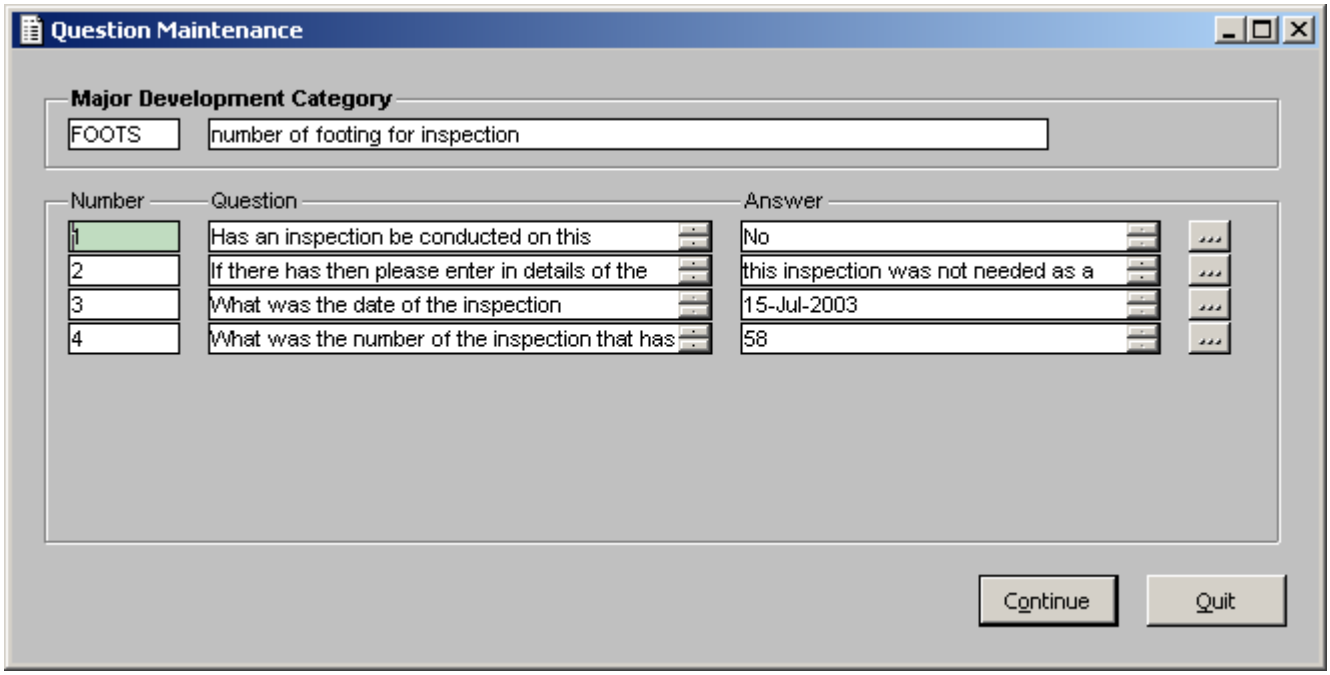
Description
This field fully details the Minor Dimension Code.

Search Profile - Type
The Search Profile may be used to “narrow” the list of Minor Dimensions.
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 - 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 Development Category

The Major Development 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

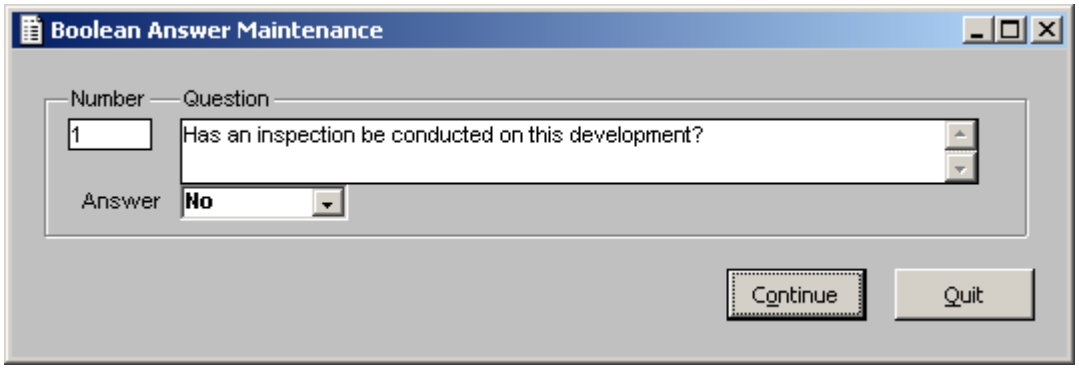
The Question as detailed in the parameters is displayed in this field. The scroll bars or zoom function can be used to display the Question in full.

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

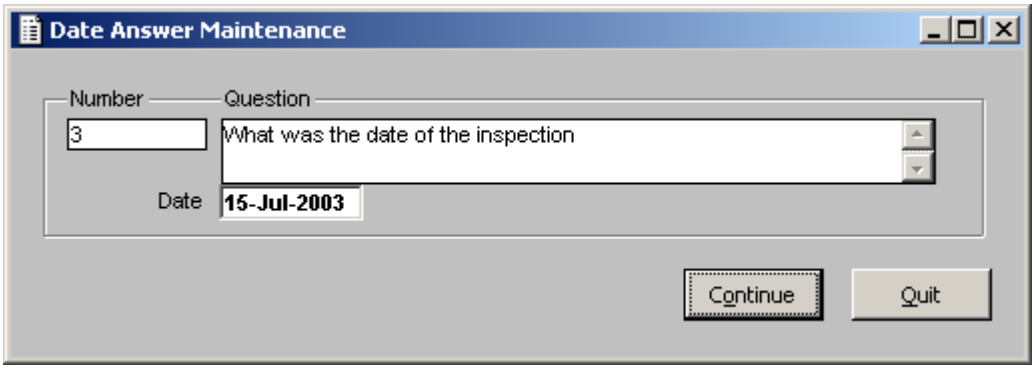
Number
The Number of the Question is displayed in this field.

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.

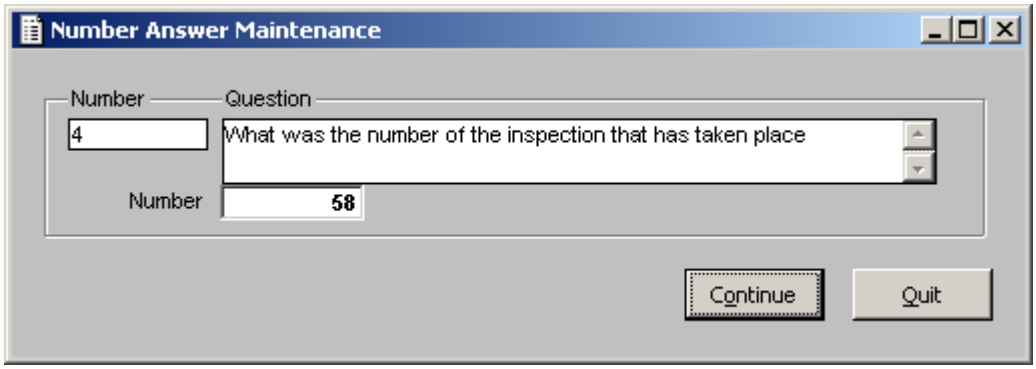
Question

The Question is displayed in full in this field.

Date
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

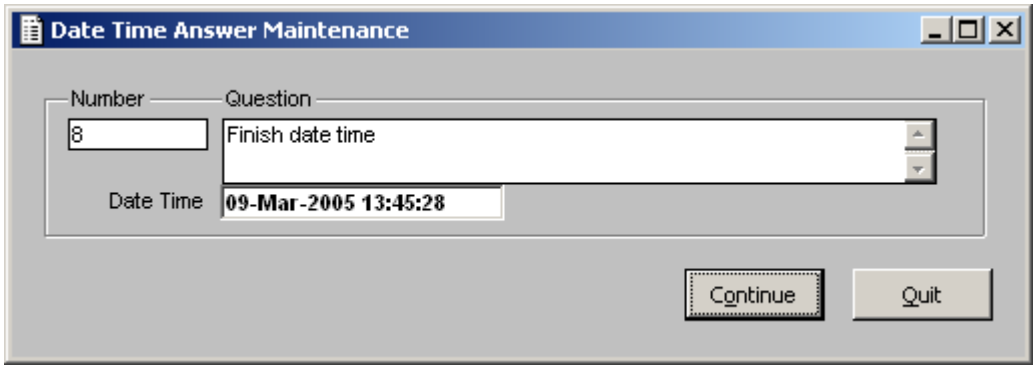
Number
The Number of the Question is displayed in this field.

Question
The Question is displayed in full in this field.

Number
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

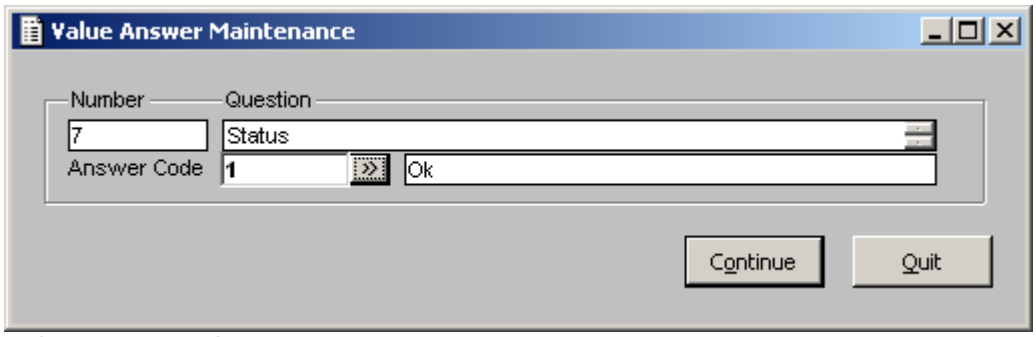
Number
The Number of the Question is displayed in this field.

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

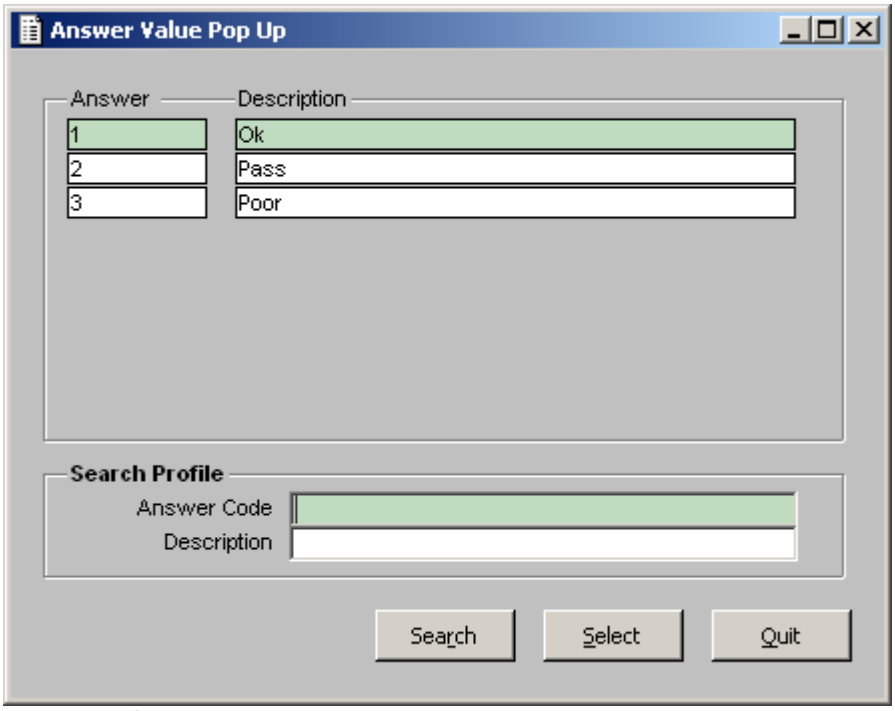
Number
The Number of the Question is displayed in this field.

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

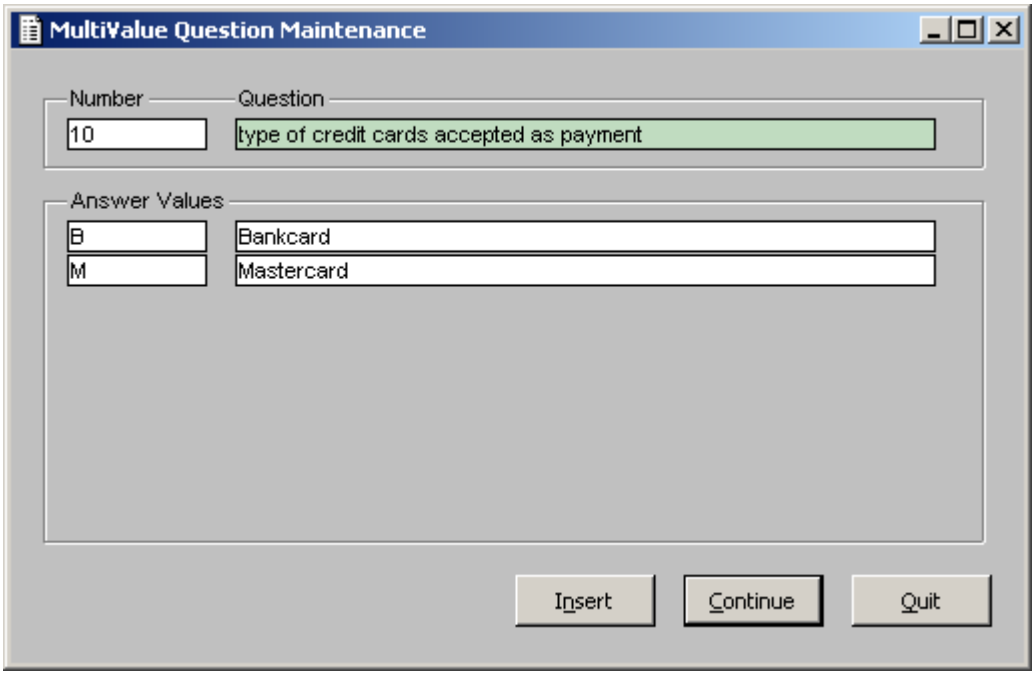
If a particular Answer Code is required then it can be searched upon using this field. The Answer Code can be entered and the Search Option selected to display the required Code. Wildcard searching is available in this field.

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.

Multi Value Answer Maintenance Form

The Multi Value Answer Maintenance Form is displayed when the Answer has been defined as a MultiValue Question Type. It allows the selection of multiple 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



MultiValue Answer Maintenance Form

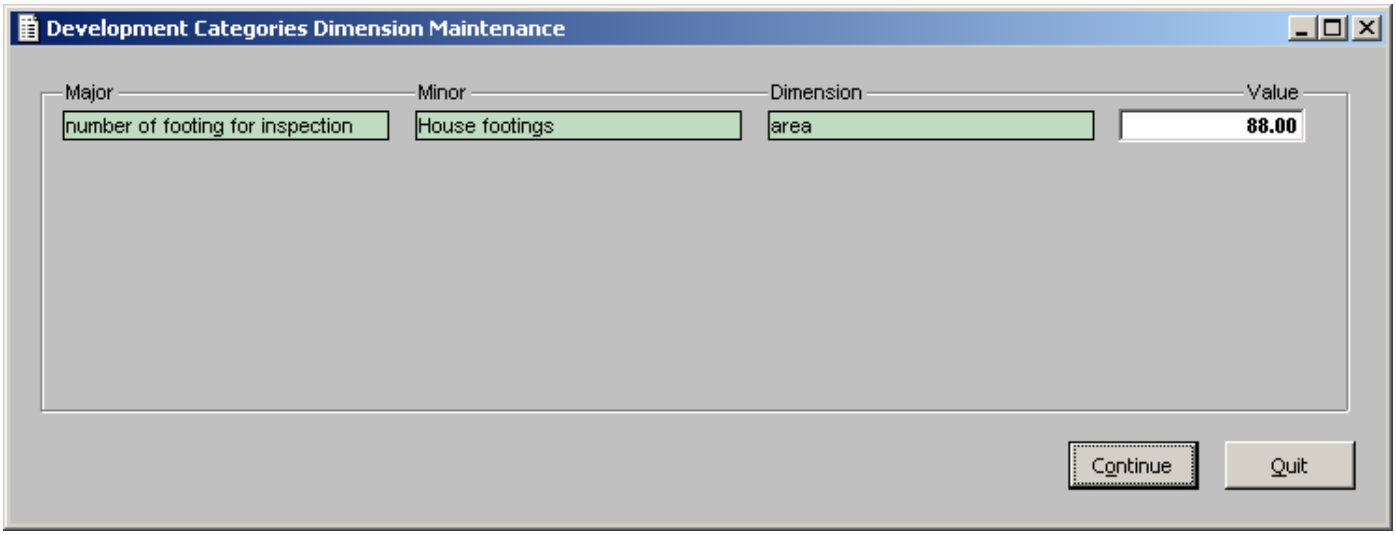
Number
The Number of the Question is displayed in this field.

Question
The Question is displayed in full in this field.

Answer Values
The Answer Values that have been selected are displayed in this area. Multi Answers are able to be defined in this area using the insert option.

Development Categories Dimension Maintenance Form

The Development Categories Dimension Maintenance form is used to allow the User to quickly enter in or check the values of the Dimensions associated to the Development Categories assigned to the Application.



Development Categories Dimension Maintenance Form

Major
The description of the Major Category is displayed in this field.

Minor
The description of the Minor Category for the Major Category is displayed in this field.

Dimension
The description of the Dimension is displayed in this field.

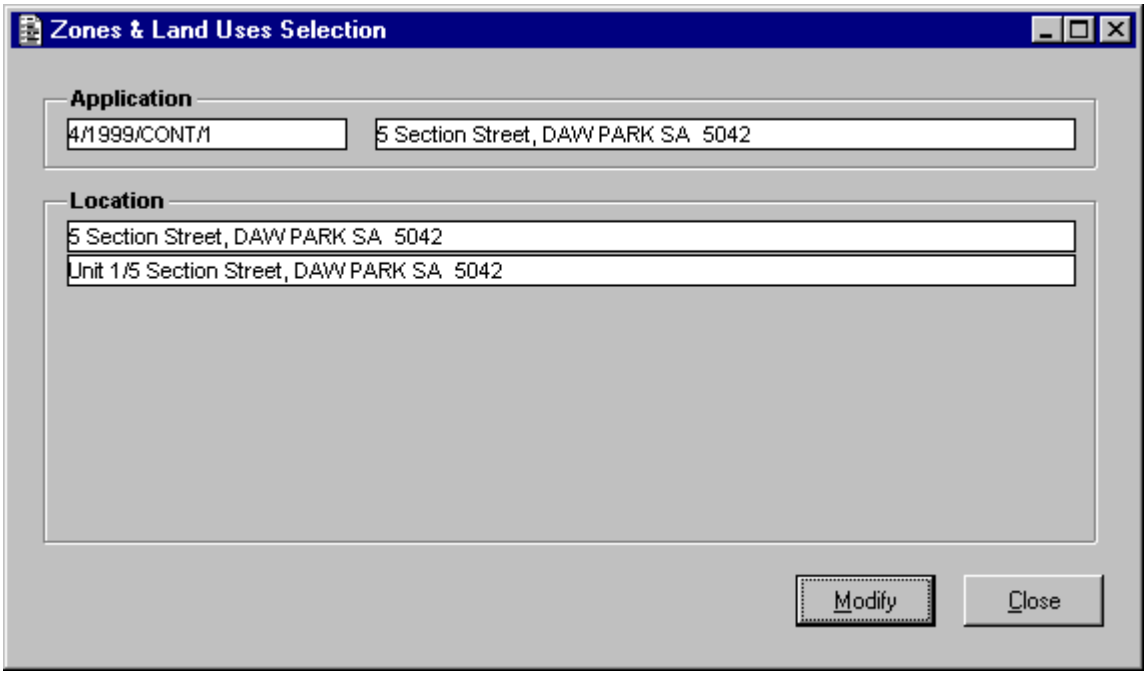
Value
The Value for the Dimension is shown in this field. It is possible for the User to change the Value from this form instead of having to drill down through the Major and Minor Category forms.

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.

Zones & Land Uses

This form displays the Zones and Land Uses of the property that the application has been lodged against. Additional Zones and Land Uses can be added to the property from this option by taking the following steps:-
Highlight either a Zone or Land Use Code (whichever is applicable).
Click on the Insert button.
An additional field is displayed with a pop-up button. Click on the pop-up button.
A list of valid Zones or Land Uses are displayed. Make your selection.
The Zone or Land Use has been added to the property with a Status of 'Proposed'. The Status Fields cannot be maintained in this option. Maintenance of this type should be performed in Property Maintenance.

Zones & Land Uses Selection Form



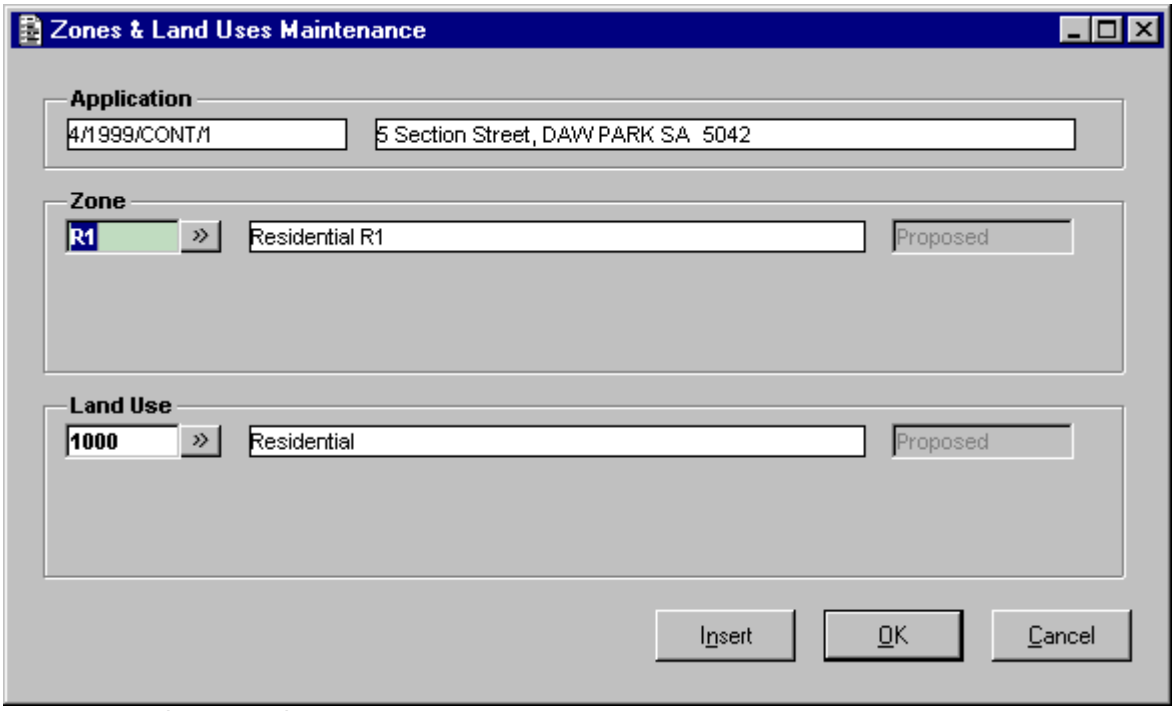
Zones & Land Uses Selection Form

Application
This field displays the Application Number and Location.

Location
This field displays the Formatted Address of the Location.

Zone and Land Uses Maintenance Form

The Zone and Land Use Maintenance Form allows the User to enter Zone and Land Uses against an Application. These Zones and Land Uses are then entered on the Application as Proposed.



Zones & Land Uses Maintenance Form

Application

These two fields detail the Application currently shown and its Primary Location.

Zone

This field allows the User to enter a Zone Code if known, or click on the Pop Up Button to be presented with a list of Zone Codes predefined in the Property System.

Land Use

This field allows the User to enter a Land Use Code if known, or click on the Pop Up Button to be presented with a list of Land Use Codes predefined in the Property System.

In some instances, the User may see that the Zone Code is actually named something other than Zone. An example of this is that it may be called a Precinct.

Amendments

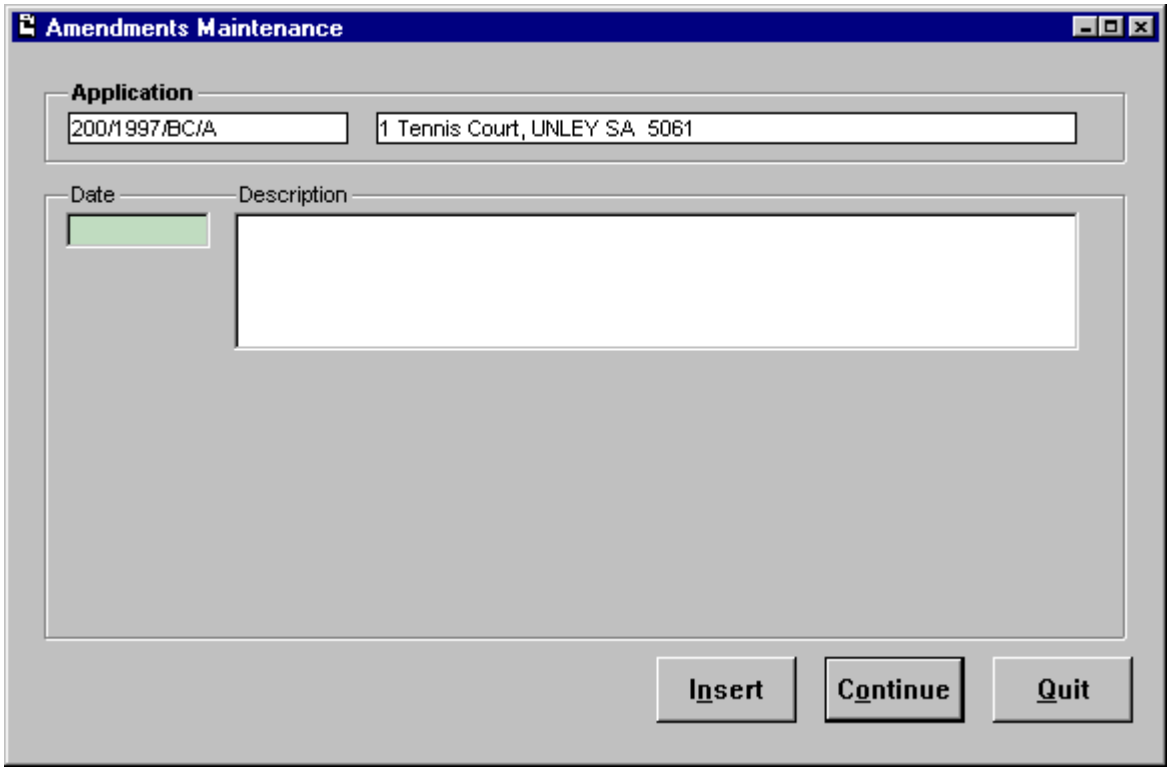
This option allows for the recording of minor amendments to an application where a new application is not required to be lodged. A date and description is required.

An unlimited number of amendments may be entered.

If major amendments are made to an Application then a new Application may need to be lodged using the Lodgement function and selecting the Amended button.

Amendments Maintenance Form

The Amendments Maintenance Form allows the User to enter in at any stage of the Application, changes to an Application.



Amendments Maintenance Form

Application

These two fields detail the Application currently shown and its Primary Location.

Date

This field is a numeric date field. The date may be keyed directly into the field, or use the mouse to double click the left mouse button in the field. This will then present a Calendar for the User to pick the required date.

Description

This field allows the User to enter multiple line comments regarding the reasons why Amendments have been made to the Application.

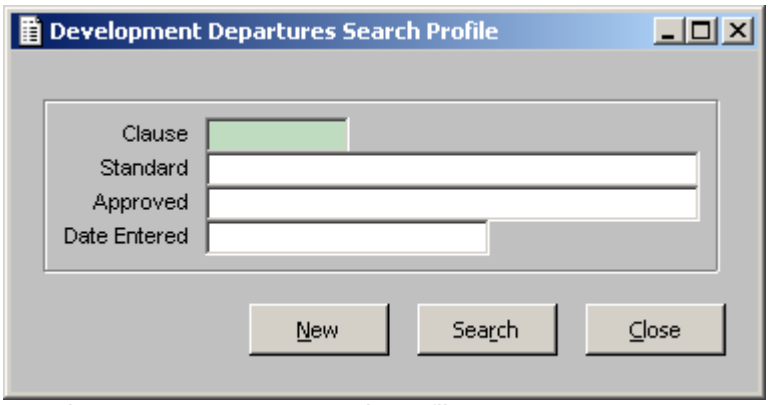
Other Amendments may be added, by selecting the Insert button and following the above steps.

Development Departures

Development Departures allow for specific information to be entered against an Application that makes the Application different from a Standard Type generally entered. This Application will have specific reasons as to why it has been allowed and the person or Authority granting this departure.

Development Departures Search Profile Form

The Search Profile allows the User to choose one or more of the following fields to find information on an Application Development Departure.



Development Departure Search Profile Form

Clause
This field allows the User to enter a specific Clause that has been entered against the Development Departure. Click on the Search Button once a Clause has been entered to begin the Search on the selected Criteria.

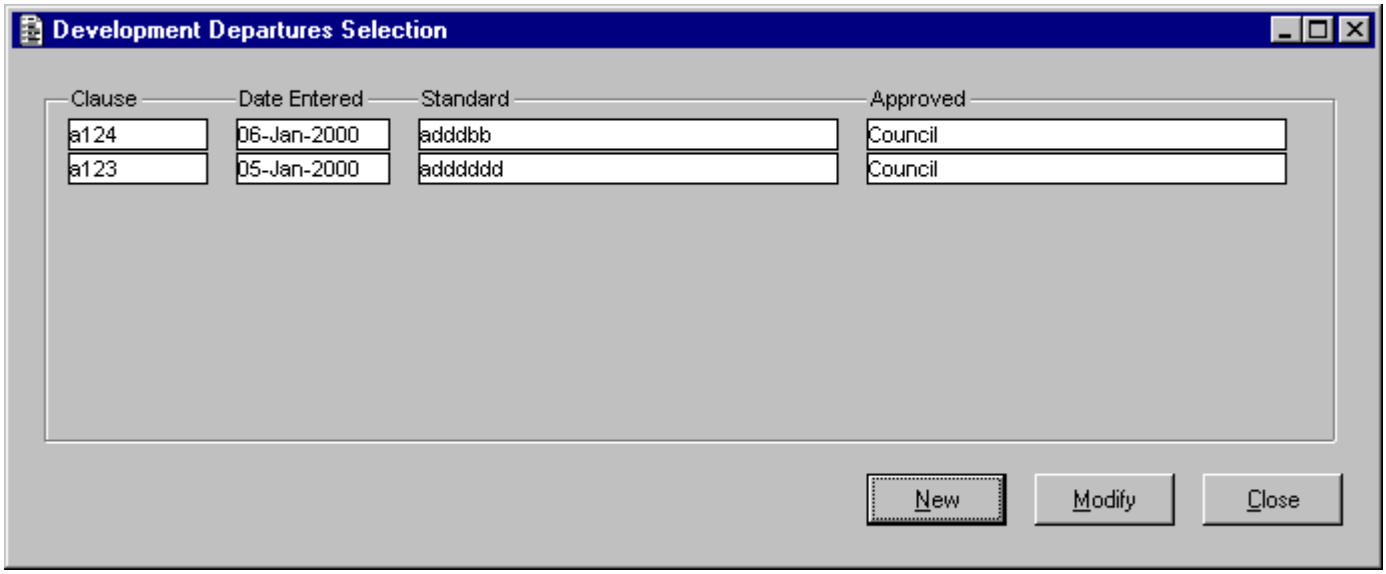
Standard
This field allows the User to enter a specific Standard that has been applied to the Application Development Departure. Click on the Search Button once the Standard entered, to begin the Search on the selected Criteria.

Approved
This field allows the User to enter information on the Approval of this Development Departure. Click on the Search Button once the Information is entered, to begin the Search on the Criteria entered.

Date Entered
This field will allow the User to enter a Date that the Information was entered against the Development Departure. Click on the Search button once the a Date has been entered to begin the Search.

Development Departures Selection Form

This form allows the User to select and Modify an existing Development Departure, or click the New Button to add a New Development Departure to the Application.
The form consists of the following fields.



Development Departures Selection Form

Clause
This field allows the User to enter a specific Clause that has been entered against the Development Departure.

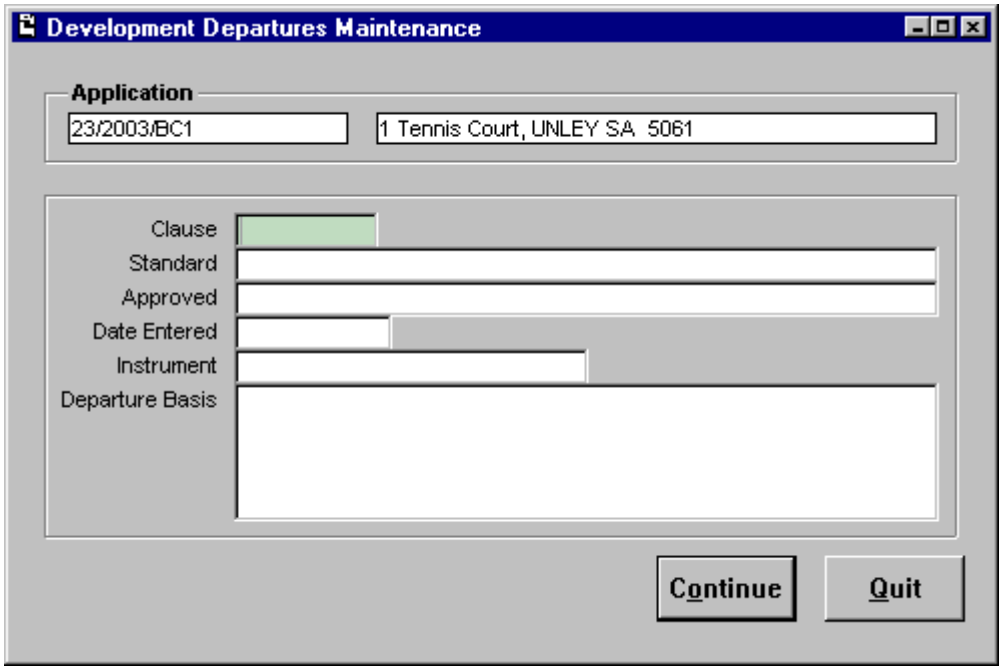
Date Entered
This field will allow the User to enter a Date that the Information was entered against the Development Departure.

Standard
This field allows the User to enter a specific Standard that has been applied to the Application Development Departure.

Approved
This field allows the User to enter information on the Approval of this Development Departure.

Development Departures Maintenance Form

The Development Departure Maintenance Form will be displayed if the User has either clicked on the Modify button from the Development Departure Selection, or the New Button from the same form. It enables the User to modify an existing record, or create a new one. The form consists of the following fields.



Development Departure Maintenance Form

Application

The Application Number and its Primary Location are displayed in these fields.

Clause

This field allows the User to enter a specific Clause that has been entered against the Development Departure.

Standard

The Standard field allows for additional information to be entered by the User.

Approved

The Approved field allows for additional information to be entered by the User.

Date Entered

This field will allow the User to enter a Date that the Information was entered against the Development Departure.

Instrument

This field allows the User to enter specific details as to what caused the Development Departure for example it may have been a Government Act, a Court Case etc.

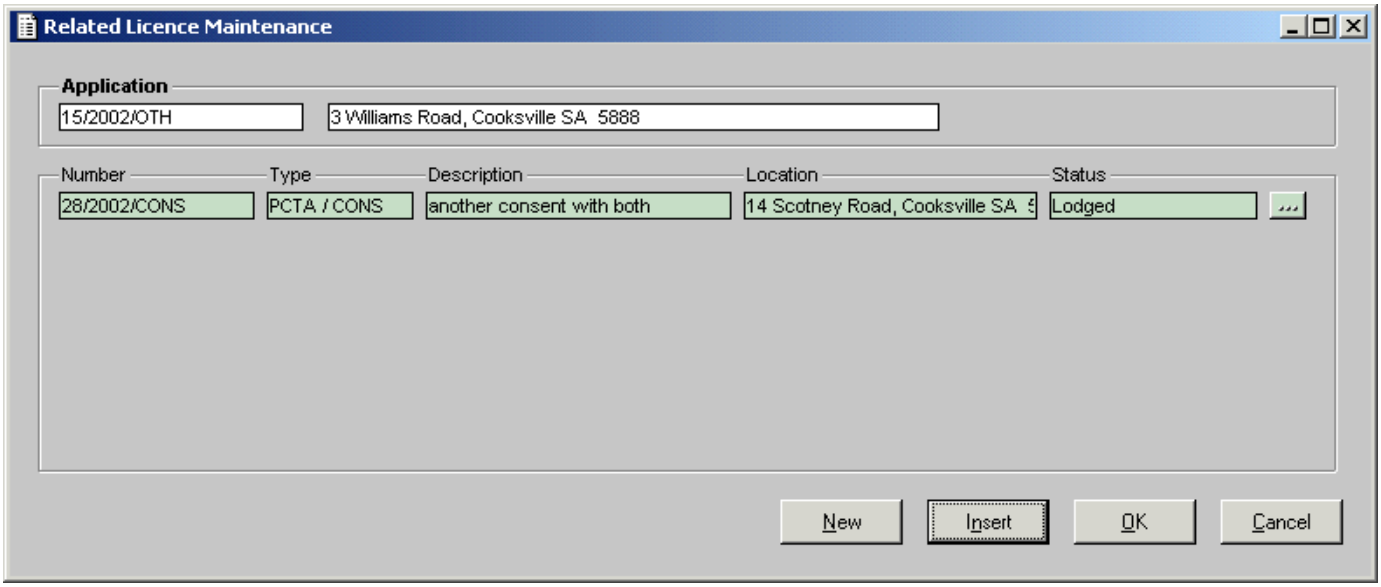
Departure Basis

This field allows the User to enter information on the Departure Basis. This is a free text field.

Related Applications

Related Applications Form

The Related Applications option allows the User to “attach” another Application to the particular Application that you may be actioning. For Example if an Applicant was making renovations to their house, and whilst this was being carried out they decided to build a pool as well, then they registered an Application to build a pool in the back yard. This Application may be lodged, and then related to their original Application for the Renovations. The Form consists of the following fields.



Related Applications Form

Application
The two fields consist of the Application Number and the details of the Primary Location.

Number
This field details the Number of the Application that is currently being accessed is related to.

Type
This field details the Type of Application that Related Application is assigned to.

Description
This field details the Description that has been assigned to the Related Application.

Location
This field details the Primary Location that the Related Application is assigned to.

Lodged
This field displays the date that the Related Application was Lodged.

Status
This field details the Status that has been assigned to the Related Application.

Detail Button
This Button when click will detail out to the actual Related Application in maintenance mode.

Joint Applications

Joint Applications allow the User to create another Application that is joined to the current Application being maintained. Whilst it appears that there are 2 Applications in the system, there is actually only one. Hence when the Joint Application is updated the information is also then available on the original Application.

Joint Applications Maintenance Form

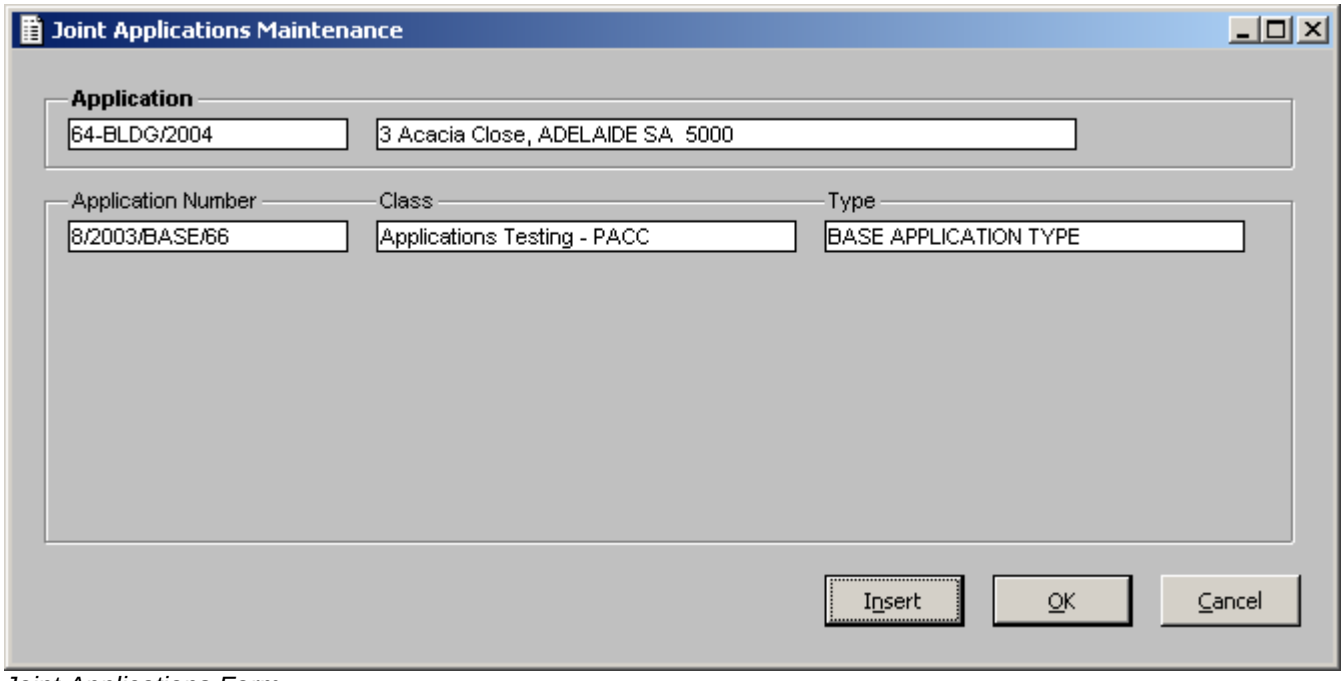
Joint Applications allow the User to create another Application that is joined to the current Application being maintained. Whilst it appears that there are 2 Applications in the system, there is actually only one. Hence when the Joint Application is updated the information is also then available on the original Application.

An example of this is:
A Building Application exists in the system and a Planning one is required to be linked to this.
This is actioned by selecting the Building Application and then using the Joint Application function to actually Join the two applications together. The Planning Application will be allocated its own number, but behind the scenes it is actually the same internal number (tpk).

Anything actioned on the Planning Application such as Conditions etc will be displayed on the Building Application and vice versa. If fees are added on the Building Application they are displayed in the Planning Application.

When viewing Applications via the Property Menu only the primary Application (Building Application) is displayed as there is actually only one application in the system.

If Users wish to have separate Building and Planning Applications they should use the Related Option instead of the Joint Application one.



Joint Applications Form

Application

This field allows the User to key an existing Class Code if known, or Click on the Pop Up Button to select from a list of predefined Classes.

Application Number

The Application Number of the Joint Application is displayed in this field.

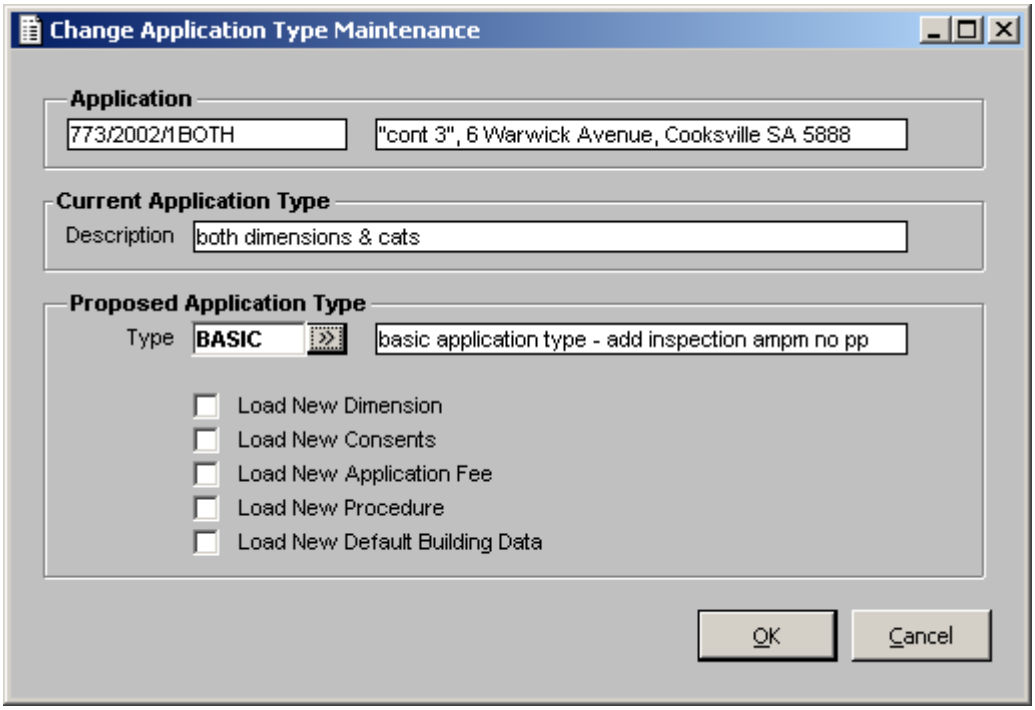
Class
The Class of the Joint Application is displayed in this field.

Type
The Application Type of the Joint Application is displayed in this field.

Change Application Type

Change Application Type Form

The Change Application Type Form is designed to allow the User to make changes to an Application Type. A new Type may be selected, and specific functions can be loaded to alter the Application totally. The form consists of the following fields:



Change Application Type Form

Application

These two fields detail the actual Application Number current and its Location.

Current Application Type - Description

This field details the Current Application Type and is full Description.

Proposed Application Type – Type

This field allows the User to select an Application Type that the Application will be changed to. The field will detail the new Type and its full Description.

Proposed Application Type - Load New Dimensions

Selecting this Option will Load any new Dimensions associated with the Proposed Application Type. New Dimensions will be loaded, but any existing Dimensions remain against the Application.

Proposed Application Type - Load New Consents

Selecting this Option will Load any new Consents associated with the Proposed Application Type. New Consents will be loaded, but any existing Consents remain against the Application.

Proposed Application Type - Load New Application Fee

Selecting this Option will Load any new Application Fees associated with the Proposed Application Type. New Application Fees will be loaded, but any existing Application Fees remain against the Application.

Proposed Application Type - Load New Procedure

Selecting this Option will Load any new Procedures associated with the Proposed Application Type. New Procedures will be loaded, but any existing Procedures remain against the Application.

Proposed Application Type – Load New Default Building Data

Selecting this Option will Load any new default Building Data associated with the Proposed Application Type. New Building Data will be loaded, but any existing Building Data remains against the Application.

If Dimensions and Fees associated to the Default Building Classification are to be added as well for the Building Class than the Load New Fees Option should also be nominated with this Option. If not then only the Building Data is added and no Dimensions or Fees.

Delete Application

An Application may only be deleted if it has no Fees, Decisions or Consents against it.
If the User wishes to proceed with Deleting the Application, and these Options are registered against the Application they must be removed first. Any Fees must be reversed from the Application and the appropriate action taken with any money received. Consents and Decisions need to be removed from the Application.

Once the Options are no longer on the Application, the User may then take the Delete Application Option from the Application Summary Screen.

The User will be presented with a Warning Message asking if the User is sure they wish to remove the specific Application Number.

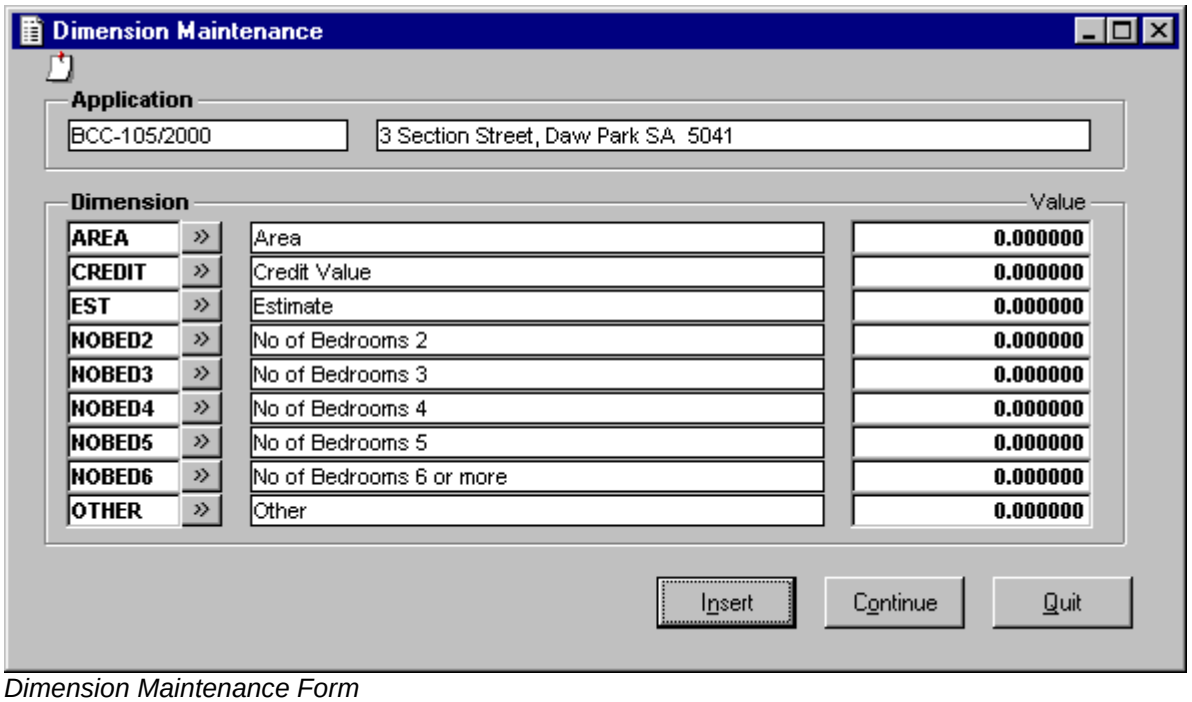
Answering Yes to this question will result in the Application being removed. Answering No to this question will return the User to the Option Form.

Application Dimensions

Dimension Maintenance Form

The Dimension Maintenance form enables the entry, or maintenance of Dimensions for the Application. 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

Application

The Application Fields are made up of two sections. The First being the actual Application Number selected and the second being the location of the Application

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 Application 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: - 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.

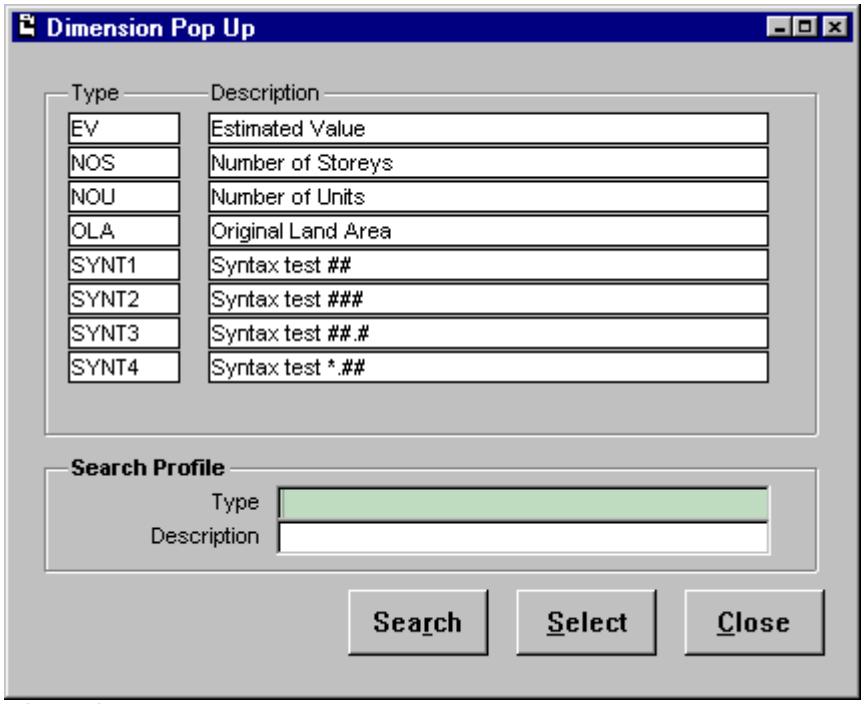
The characters Hash (#), Asterisk (*), and Decimal Point (.) can be used in the formatting. In conjunction with the Hash characters, Brackets can be used. The use of Brackets allows the format to be defined so that if numerics are entered they can be upto a certain value. Refer to the Table following 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
This field details the Code given to the Dimension.

Description
This field is a detailed Description of the Dimensions available.

Search Profile - Type
This field may be used to key in a Type or Part Type with the correct Operand at the end to Search on.

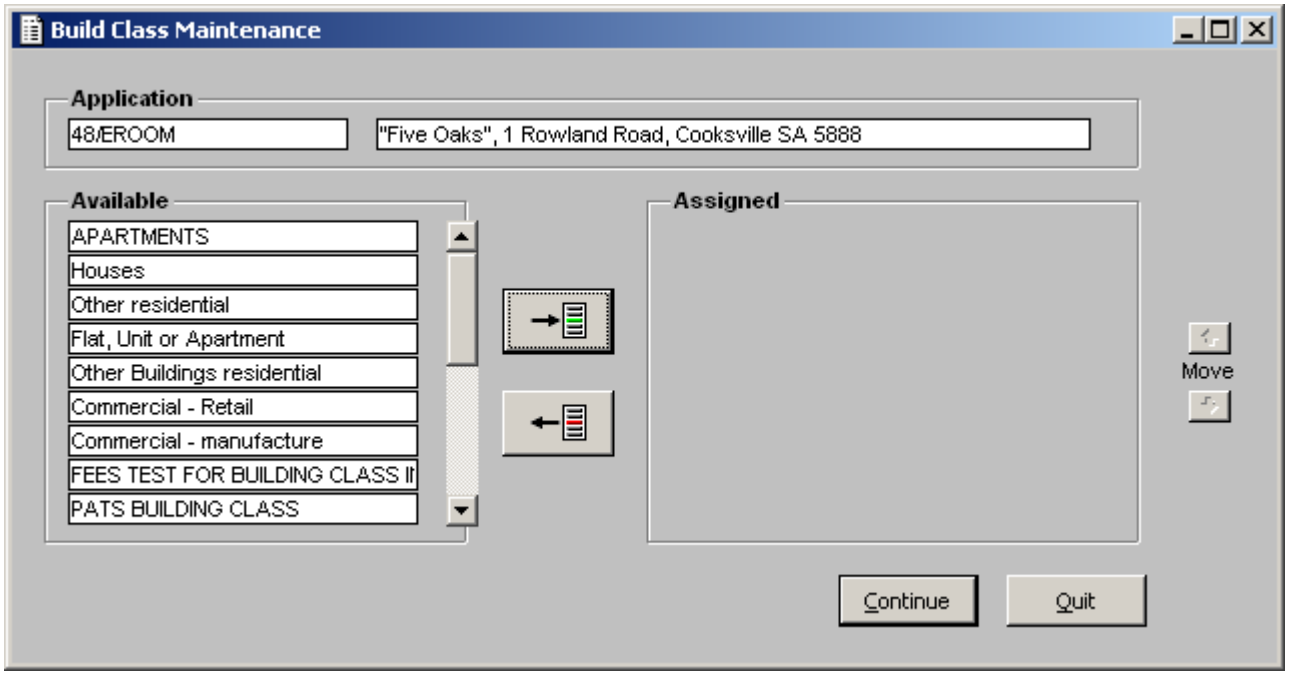
Search Profile - Description
The Description Field may be used to key full or part Description to Search for a Dimension.

Building Class

Building Class Maintenance Form

The Building Class Maintenance form enables the selection of the required Building Class to be used to generate the Fee on the application.

Where the Fee has been defined as a Building Class fee then this form is displayed to allow the User to select the required building class information to be used to generate the fee.



Building Class Maintenance Form

Application

The Application Fields are made up of two sections. The First being the actual Application Number selected and the second being the location of the Application

Available

The Available Building Classes are displayed in this area. The User needs to assign over to the Assigned section the Building Class(s) that are applicable for the application.

Assigned

Assigned Building Classes are shown in this area.

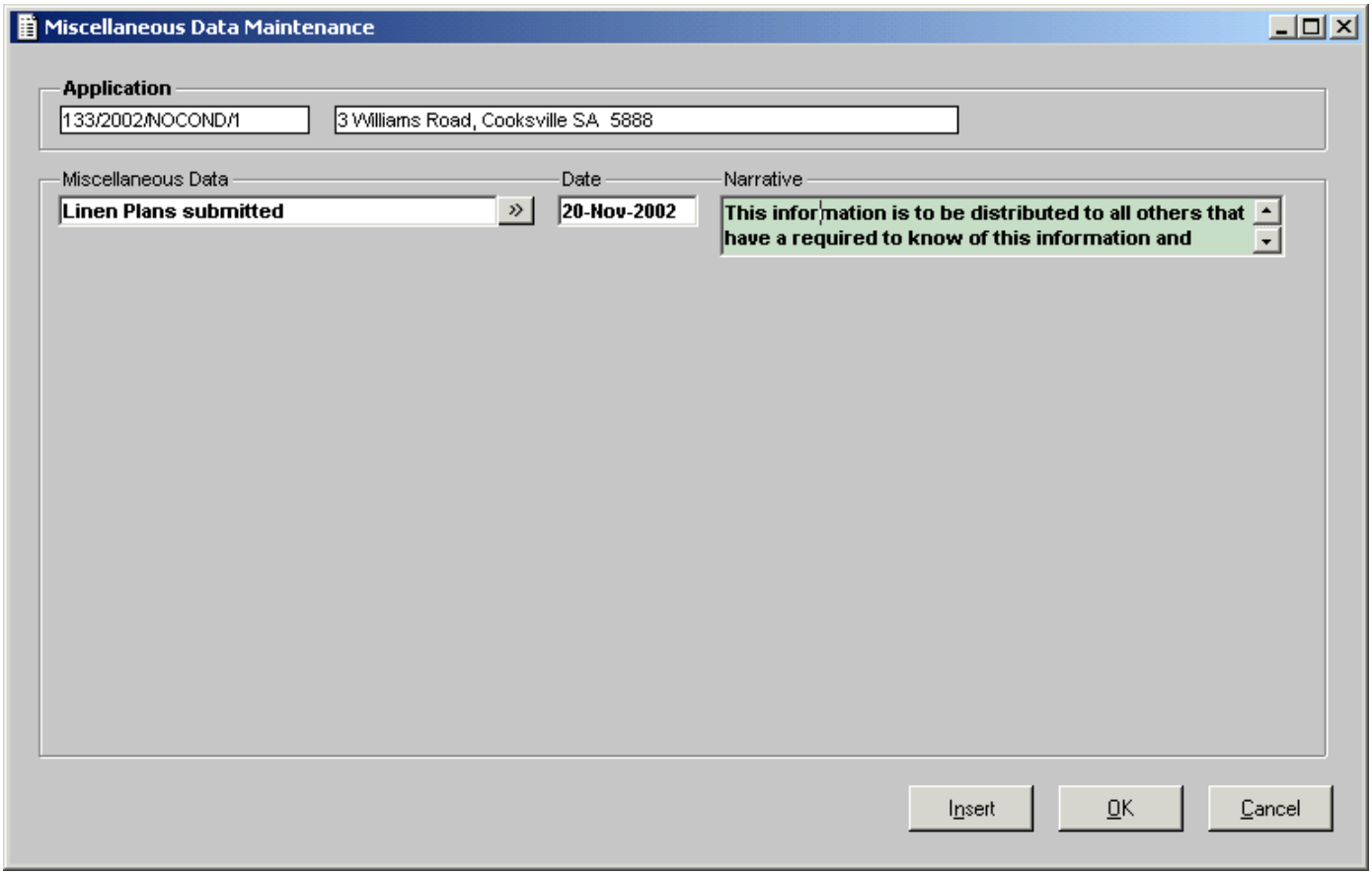
If required the User can detail out on the Detail option to display the Building Classifications and Building Type Maintenance Form.

Miscellaneous Data

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 Applications for the particular type of Application or as a general field. A simple example of this may be: - Landscape Gardening Firm name. This may be required for some reason.

The sequencing that has been defined within the Miscellaneous Data Parameter 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 sequence.



Miscellaneous Data Maintenance Form

Application

The Application Fields are made up of two sections. The First being the actual Application Number selected and the second being the location of the Application

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.

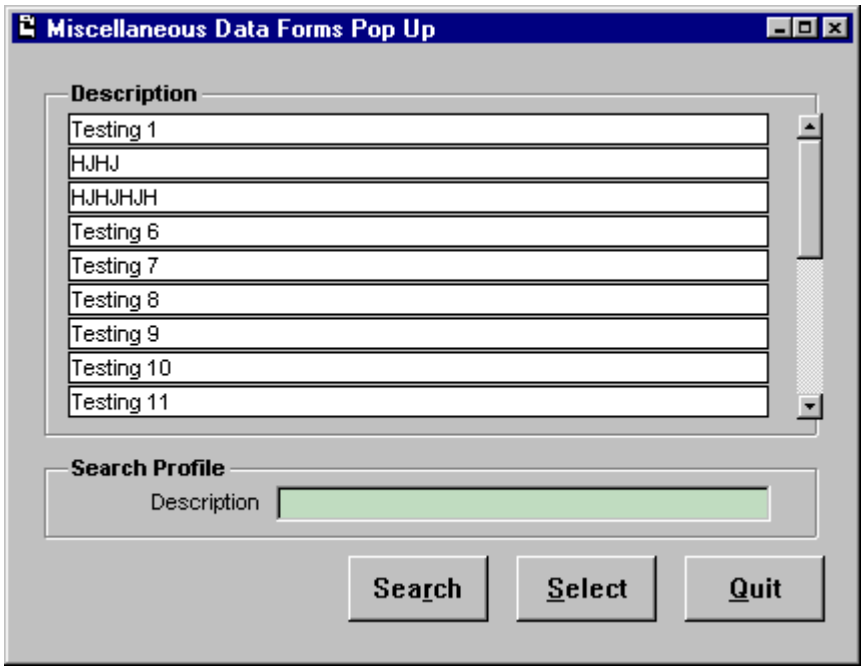
Date

This field is used to enter the date the Miscellaneous Data is lodged on the Application.

Narrative

The Narrative field allows unlimited information to be stored against a Miscellaneous Data Type.

Miscellaneous Data Pop Up Form



Miscellaneous Data Pop Up Form

Description
The Miscellaneous Data Pop Up Button is used to select pre-defined entries of Miscellaneous Data.

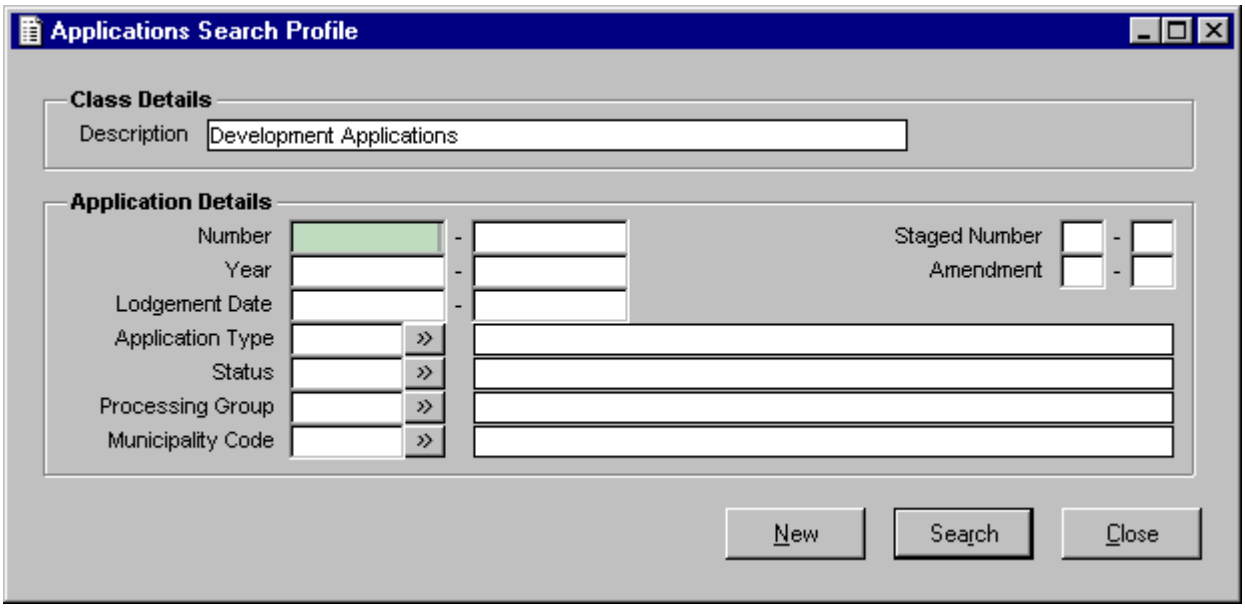
Search Profile - Description
The Search Profile may be used to key in a Description for Searching upon.

Inspections

Applications Search Profile Form

The Applications Search Profile form is displayed when the Filter by Options – Applications button is selected on the Inspection Search Profile Form

The Applications Search Profile form is used to enter specific criteria to allow a previously lodged Inspection to be displayed for Applications. If all Application Inspections are required do not enter any details and click on the Search button all Inspections relating to the selected Class will be displayed. One or more of these may then be selected for modification or Enquiry.



Applications Search Profile Form

Class Details
This field displays the description of the Application Class. This field is display only and may not be maintained.

Number
As each Application 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 Applications with Inspections is 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 Applications with Inspections 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 Application 6 and greater, with Inspections.

Staged Number
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 Staged Applications are required then enter the required number into the second field. This will result in all staged Applications with Inspections being returned for selection meeting the search criteria.

Year

Applications 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 Applications with Inspections lodged within the entered year and meeting any other search criteria.

However if a range of Applications with Inspections 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 Application with Inspections within the year range entered inclusive of the entered years and meeting any other search criteria.

Amendment

Enter an alpha character in the first field, this will default into the second field and result in a direct search for the Amended Application with an Inspection.

However if a range of Applications with Inspections are required then the following example explains how this is done;

Entering an alpha character in the first field and a different character in the second field eg. A and D, will result in all Amended Applications with Inspections with the range entered inclusive of the entered characters and meeting any other search criteria.

Lodgement Date

These fields display the date an Application with an Inspection was lodged. Keying in this date if known will also make you search more exact.

Application Type

Ease Application has a predefined type. A Type can be keyed into this field, or the Pop Up Button selected to choose from the Application Type Pop Up form.

Status

Each Application 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.

Processing Group

Each Application is assigned a Processing Group. The Processing Group may be keyed into the field if known, or use the Pop Up Button to choose from the Processing Group Pop Up form.

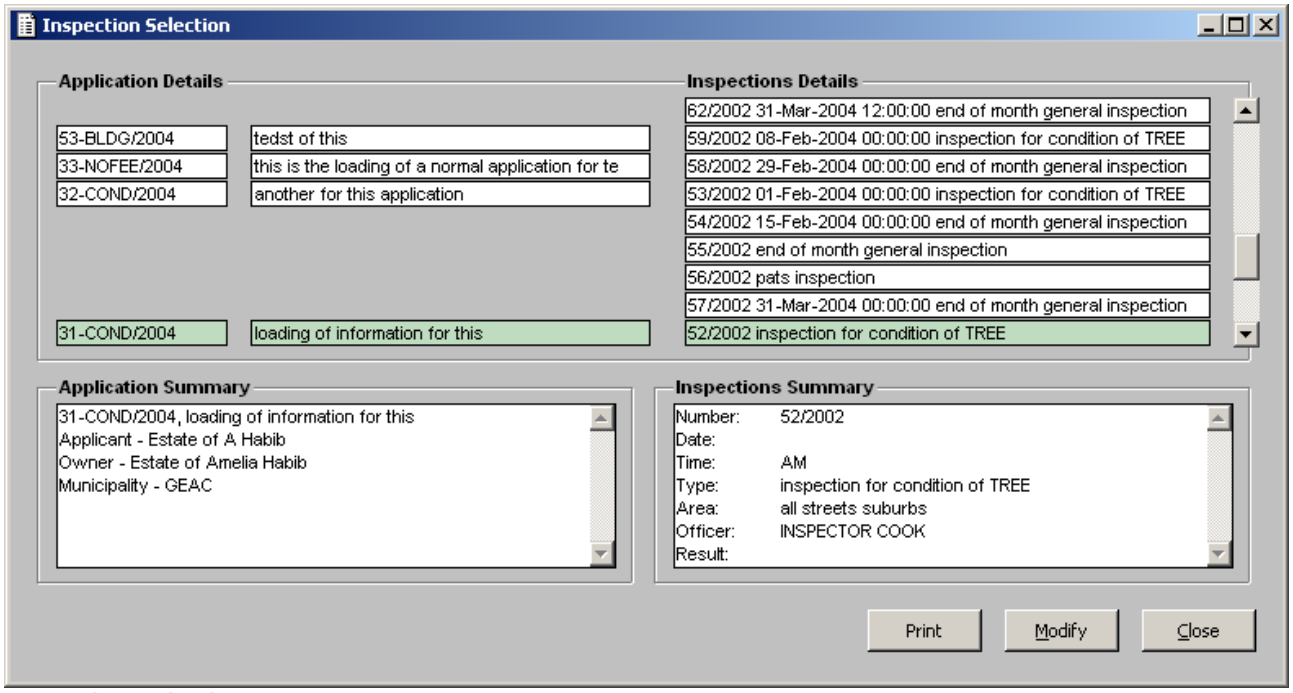
Municipality Code

Each Application is assigned a Municipality Code. The Municipality Code may be keyed into the field if known, or use the Pop Up Button to choose from the Municipality Code Pop Up form.

Inspection Selection Form

The Inspection Selection form is displayed when the Search button is selected on the Application Search Profile Form

The Application Selection form displays details of the Applications with Inspections that have met the particular Criteria selected in the Search Profile. The Applications may then be selected and modified.



Inspection Selection Form

Application Details

These fields display the Application Number and Description of the Application with an Inspection that has met the search criteria. These fields are display only and may not be maintained.

Inspections Details

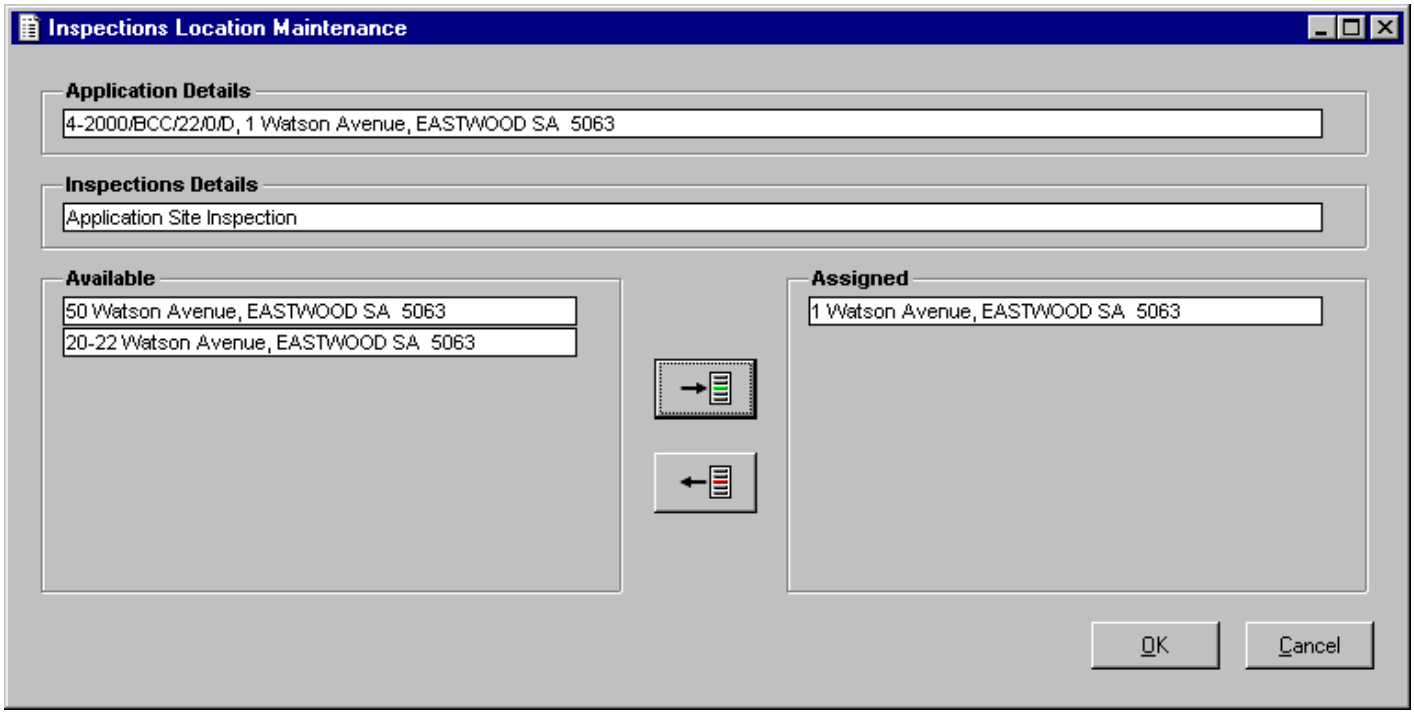
These fields display the Inspection Number and Description of the Inspections that has met the search criteria. These fields are display only and may not be maintained.

Summary

The left-hand summary field displays the details of the Application that has focus.
The right-hand summary field displays the details of the Inspection that has focus.

Inspections Location Maintenance Form

The Inspections Location Maintenance Form is displayed when the Locations Button is selected on the Inspections Maintenance Form.



Inspections Location Maintenance Form

Application Details

This field displays the Application details. This field is display only and may not be maintained.

Inspection Details

This field displays the Inspection details. This field is display only and cannot be maintained.

Available

This field displays the locations available to be assigned for the inspection.

Assigned

This field displays the location assigned for the inspection.

Conditions

Conditions may be added to an Application to alert the User to a particular situation that may be peculiar to that Application. The Conditions may be added as Notifiable Conditions. These Notifiable Conditions will be displayed on the screen as soon as the Application is accessed.

For full details on adding and modifying Conditions, the Conditions User Guide should be referred to.

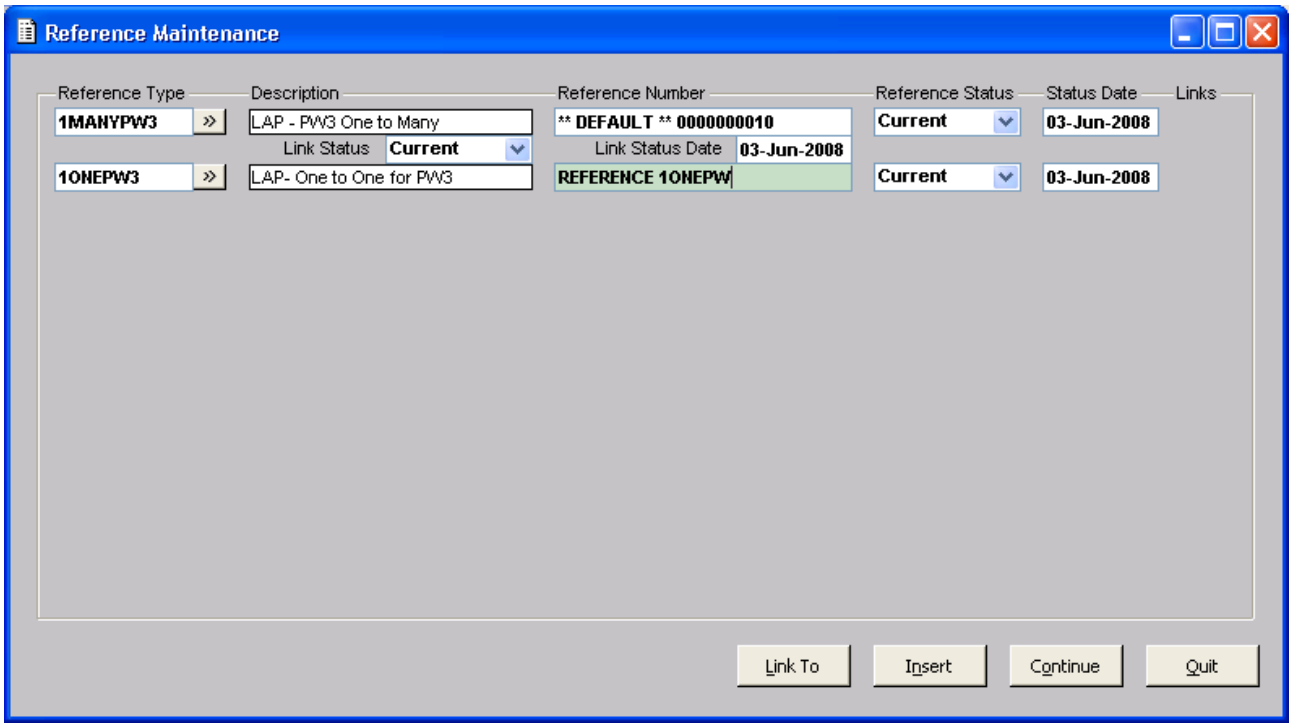
Customer Requests

The Customer Request Option allows the User to link to any Customer Requests attached to this application. Please refer to the Customer Request User guide for information on this option.

Infringements

The Infringements Option allows the User to link to any Infringements attached to this application. Please refer to the Infringements User guide for information on this option.

References



When an Application is lodged, it will now check to see if any default References have been assigned for the Application Type of the Application being lodged. If so, it will create one new Reference against the Application for each Reference Type found.

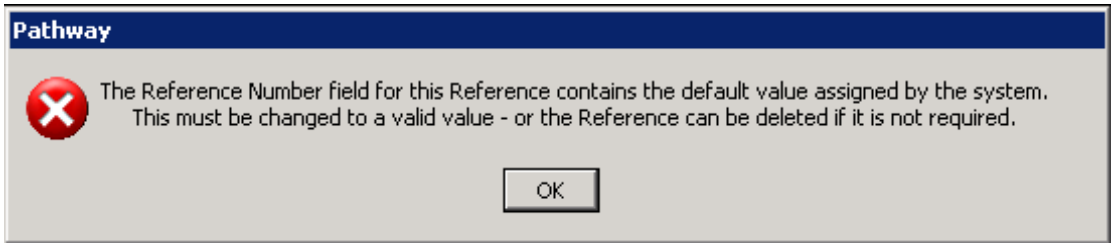
NOTE When these References are created by the system, they will be created with the Reference Number set to a unique default value comprising the following:-

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 Licence until this problem is addressed.

Reference Maintenance also allows the creation of new references or linkage to previously created references set up as "Sharing".

The References attached to this Application can be either added or deleted through this option when in Maintenance mode.

The Maintenance and Linking of References is detailed separately in the References User Guide.

Registers

The Registers Option allows the User to select any registers, which have been set up and link them to this application.. Please refer to the Registers User guide for more information on this option.

Set Cashier Warning

The Set Cashier Warning Option displays the Warning Codes Pop Up Form which allows the User to select a warning code to apply to this application.. Please refer to the Receipting User guide for more information on this option.

Workflow

The Workflow Option displays the Workflow Task Summary form, which allows the User to set up tasks to apply to this application.

WORKFLOW SYSTEM ACTION

A new Workflow system action, *Add Property Certificate*, is available when defining user actions within Workflow Parameters in the Application Parameters menu option, as accessed from the thick client. It allows the user to create a certificate for the primary location against an application.

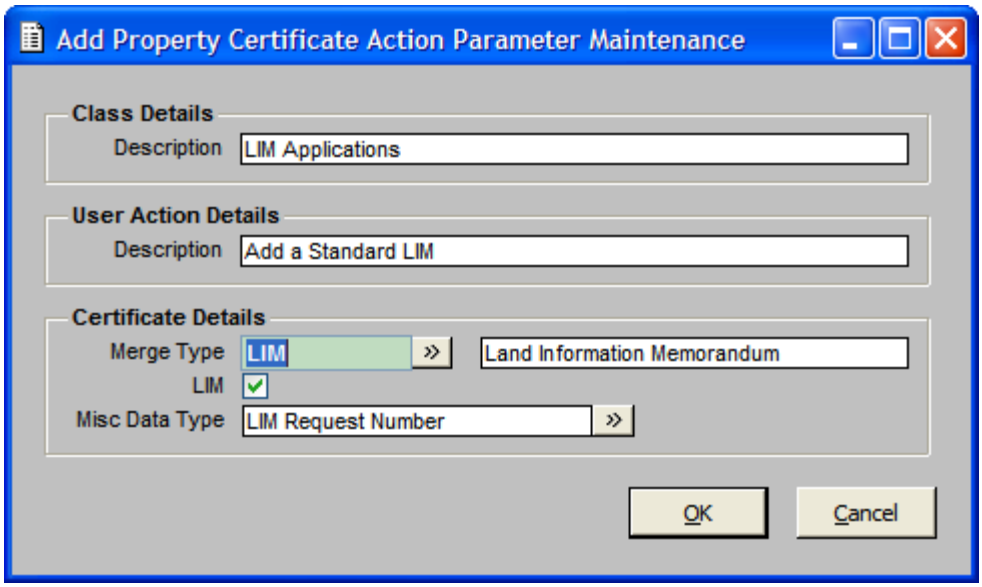


Figure 1. The thick client's "Add Property Certificate" action parameter maintenance form.

The parameter maintenance form for the action, shown in Figure 1, primarily allows the specification of a default merge type to use as the basis of the property certificate. The list of merge types to choose from is as defined in the Property Administration >> Property Parameters >> Certificate and Notice Parameters >> Merge Type Maintenance menu option, with merge class CERTIFICAT.

Note: It is *not* necessary for an extract type based on the INFREQUES extract list to be selected against the chosen merge type.

A checkbox indicates whether the new property certificate will represent a LIM. If selected, a *Miscellaneous Data Type* field is enabled, in order to specify a place to hold a LIM's document request key against an application.

When actions based on *Add Property Certificate* are executed as part of a Workflow task, the thick client's Certificate Entry form is displayed pre-populated with the merge type specified in the action parameters, as shown in ***Figure 2***. It is still possible to replace the pre-populated merge type with a different one. The request summary is also populated with application information, to aid later identification. If the *LIM* checkbox has been selected against the action parameters, a record is added to table LAPLIMC upon acceptance of the certificate details. Additionally, if a *Miscellaneous Data Type* has been specified, the LIM's document request key (for table CWPREQS) is stored against that data type on the relevant application. Also, within Document Request Maintenance, the request is treated as are those with a *Request Source* value of *WorkSmart*; that is, the *Generate* option is hidden, and the *Draft Print* and *Final Print* options disabled.

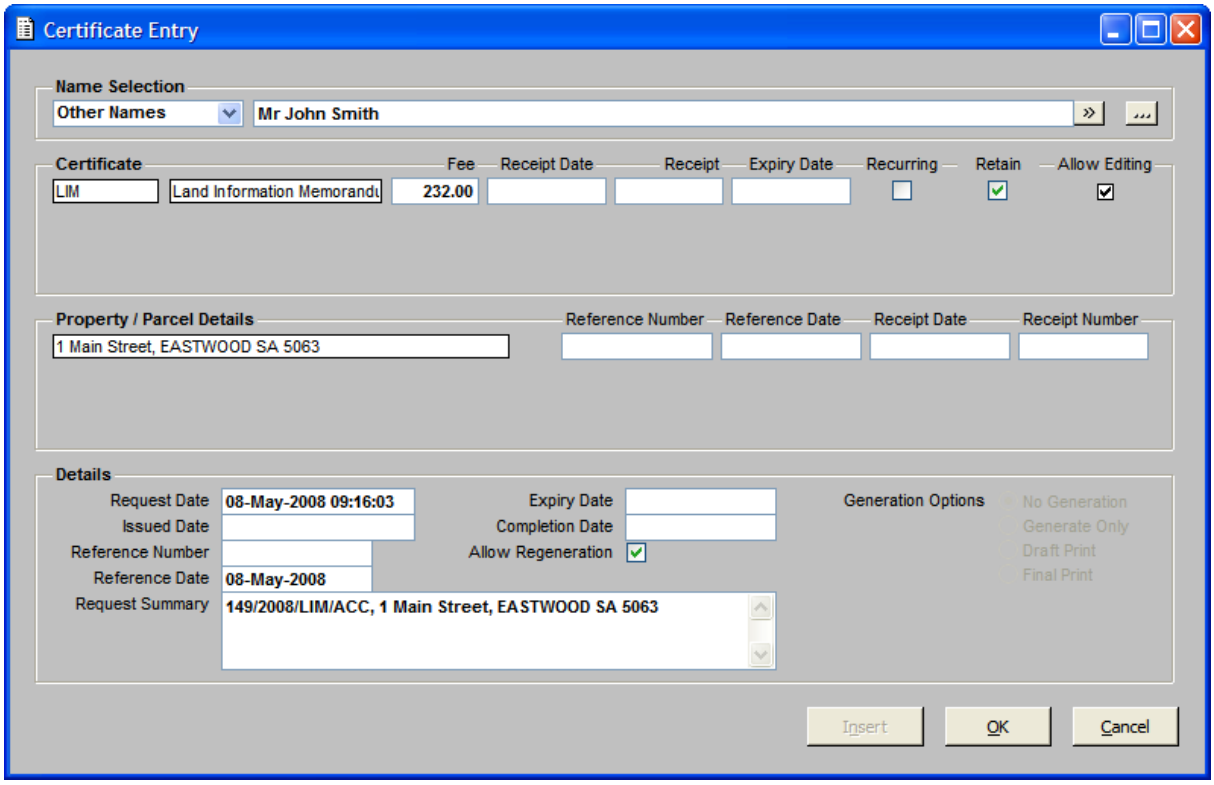


Figure 2. The thick client's Certificate Entry form shown pre-populated with default merge type from "Add Property Certificate" action parameters.

If an *Add Property Certificate* action with the LIM checkbox parameter selected is executed after a LIM has already been requested for the relevant application, a message to that effect is displayed, and it allows the user to bring up the Property/Parcel Certificate Selection form for the relevant location.

APPLICATION SUMMARY OPTIONS

The existing Property Certificates option accessible via the thick client's Application Summary form is now displayed based purely on the Responsibilities settings for the relevant application class. The presence of a Property merge type with an associated INFREQUES extract type is not required.

When invoked, the option displays the Property/Parcel Certificate Selection form for the application's primary property, rather than checking for the existence of a LAPLIMC record for the relevant application, and displaying the Certificate Entry screen if there is none. An informational message is displayed if no certificates exist. The option is also bolded when the application's primary property has certificates.

The maintenance rights available within the Property Certificates option depend on the mode the Application Summary form is running in (maintenance or enquiry), and the authorities assigned to the Certificates option within Property Administration >> Property Parameters >> Council Maintenance.

Word Processing Extract

The Word Processing Extract function (within the Word Processing >> Batch Functions menu) has been enhanced to cater for associated extract types. Previously, only data relating to top-level extract types assigned to a merge type was loaded into reporting entity CRPWP04.

To help achieve this change, field TFKCRPWP04 has been added to the CRPWP04 table. For a given record, a value in this field indicates that the data item relates to another item at the next level up in the extract type hierarchy. The TFKCRPWP04 value matches the TPKCRPWP04 value on another record, identifying the related data item. This is most easily explained with a sample set of data from table CRPWP04 showing the new field:

tpkcrpwp04	tfkcbtsjob	tfkcrpwp02	tfkcrpwp04	extrctcode	exttypcode	extrctseq	fieldname	fieldvalue

tpkcrpwp04	tfkcbtsjob	tfkcrpwp02	tfkcrpwp04	extrctcode	exttypcode	extrctseq	fieldname	fieldvalue
439	337367	73		ALLPROP	LIMPROP	1	Property_Address	1 Main Street, EASTWOOD SA 5063
440	337367	73		ALLPROP	LIMPROP	1	Property_Area	0.0m²
441	337367	73		ALLPROP	LIMPROP	1	Property_Description	Lot 17 Cont 1, Lot 17A Cont 3
442	337367	73		ALLPROP	LIMPROP	1	Property_Name	
443	337367	73		ALLPROP	LIMPROP	1	Property_Owners	Mr Fred Jones
444	337367	73		ALLPROP	LIMPROP	1	Property_Titles	CT-2097/313,CT-6109/134
445	337367	73		ALLPROP	LIMPROP	1	Property_TPK	169689
446	337367	73		ALLPROP	LIMPROP	1	Property_Type	Standard Property Type Desc
447	337367	73		ALLAPPL	LIMAPPL	1	Applicant_Name	Rocca's Home Improvements
448	337367	73		ALLAPPL	LIMAPPL	1	Applicant_Address	1429 Main North Road, PARA HILLS WEST SA 5096
449	337367	73		ALLAPPL	LIMAPPL	1	Application_Date	10-Aug-2001
450	337367	73		ALLAPPL	LIMAPPL	1	Application_Expiry_Date	
451	337367	73		ALLAPPL	LIMAPPL	1	Application_Number	27/2001/STD/GAC
452	337367	73		ALLAPPL	LIMAPPL	1	Application_Status	Direction Issued
453	337367	73		ALLAPPL	LIMAPPL	1	Application_Type	Standard App Type
454	337367	73		ALLAPPL	LIMAPPL	1	Lodgement_Date	10-Aug-2001
455	337367	73		ALLAPPL	LIMAPPL	1	Description	Patio
456	337367	73		ALLAPPL	LIMAPPL	1	Decision_Date	02-May-2002
457	337367	73		ALLAPPL	LIMAPPL	1	Decision_Number	2/2001
458	337367	73		ALLAPPL	LIMAPPL	1	Decision_Type	Approved
459	337367	73		ALLAPPL	LIMAPPL	1	Property_Address	1 Main Street, EASTWOOD SA 5063
460	337367	73		ALLAPPL	LIMAPPL	1	Property_Key	169689
461	337367	73		ALLAPPL	LIMAPPL	1	Property_Status	Current
462	337367	73		ALLAPPL	LIMAPPL	1	Application_Decisions	LIMDECN
463	337367	73	462	DECISION	LIMDECN	1	Type	REV
464	337367	73	462	DECISION	LIMDECN	1	Date	28-Feb-2002
465	337367	73	462	DECISION	LIMDECN	1	Authority	CNCL
466	337367	73	462	DECISION	LIMDECN	1	Rejection_Reason	MAT
467	337367	73	462	DECISION	LIMDECN	1	Under_Appeal	N
468	337367	73	462	DECISION	LIMDECN	1	Description	Review
469	337367	73	462	DECISION	LIMDECN	1	Approval_Number	
470	337367	73	462	DECISION	LIMDECN	1	Effective_Date	28-Feb-2002
471	337367	73	462	DECISION	LIMDECN	2	Type	APPR
472	337367	73	462	DECISION	LIMDECN	2	Date	02-May-2002
473	337367	73	462	DECISION	LIMDECN	2	Authority	CNCL
474	337367	73	462	DECISION	LIMDECN	2	Rejection_Reason	
475	337367	73	462	DECISION	LIMDECN	2	Under_Appeal	N
476	337367	73	462	DECISION	LIMDECN	2	Description	Approved
477	337367	73	462	DECISION	LIMDECN	2	Approval_Number	418
478	337367	73	462	DECISION	LIMDECN	2	Effective_Date	02-May-2002

Figure 3. Table showing new field TFKCRPWP04 in reporting entity CRPWP04, highlighted in light orange, and the row that data for extract type LIMDECN relates to, highlighted in darker orange.

Referring to the example table in *Figure 3*, the field *Application_Decisions*, represented by the row highlighted in darker orange, belongs to extract list ALLAPPL, but there was previously no entry for the field included in table CRPWP04, as it refers to an associated extract type. Note that the value of the field is the name of the associated extract type, LIMDECN. The data for the associated extract type itself, based on

extract list DECISION, is also now included in the extract, and is represented by the table rows with a TFKCRPWP04 value of “462”, a reference to the row with the *Application_Decisions* field value entry.

This principle extends to all data for associated extract types. The depth of the hierarchy of data that can be extracted is only limited by the existing (and future) extract list definitions available within Pathway.

Note: The Word Processing Extract function can also be invoked via the *DocumentRequestExtract* method of the Pathway COM object. The Pathway smart client will not be able to service this method until Release 3.03, so the thick client must be used until then.

Word Processing Extract Lists

Within the Application Letters option under the Letter Extract parameter option in the Applications >> Application Parameters menu item, the following extract list types are now available:

MEMOS	Application Memos
TASKS	Application Tasks

The MEMOS list contains the following fields, listed with their sources:

Field	Source
Group_Code	Applications >> Application Parameters>> Memo Types >> Memo Group Maintenance >> Group Code
Group_Description	Applications >> Application Parameters>> Memo Types >> Memo Group Maintenance >> Description
Type_Code	Applications >> Application Parameters>> Memo Types >> Memo Group Maintenance >> Memo Type Maintenance >> Memo Type
Type_Description	Applications >> Application Parameters>> Memo Types >> Memo Group Maintenance >> Memo Type Maintenance >> Description
Precis	Applications >> Application Maintenance >> Memo Maintenance >> Precis
From_Date	Applications >> Application Maintenance >> Memo Maintenance >> Effective From
To_Date	Applications >> Application Maintenance >> Memo Maintenance >> Effective To
Memo_Text	Applications >> Application Maintenance >> Memo Maintenance >> Detail

The list of memo details returned can be restricted by specifying a *Memo Type* value in the *Filter Options* box within Extract Type Maintenance.

The TASKS list contains the following fields, again listed with their sources:

Field	Source
Task_Type_Code	Applications >> Application Parameters >> Workflow >> Task Type Maintenance >> Task Type
Task_Type_Description	Applications >> Application Parameters >> Workflow >> Task Type Maintenance >> Task Type Description
Task_Status	Applications >> Application Maintenance >> Workflow >> Task Maintenance >> Task Status
Start_Date	Applications >> Application Maintenance >> Workflow >> Task Maintenance >> Actual Start Date

Completion_Date	Applications >> Application Maintenance >> Workflow >> Task Maintenance >> Actual Completion Date

The list of task details returned can be restricted by selecting the *Additional Filter* button in Extract Type Maintenance, and specifying values on the Tasks Extract List Filter form. A select/remove control on this form allows task types to be assigned so that the returned list only contains tasks with those types. If no task types are assigned, tasks of all types are returned. There is also a *Task Status* filter field available. The possible values generally correspond with the status values displayed on the Task Maintenance form, with the following exceptions:

Value	Meaning
All	The list of task details is not restricted by status.
Incomplete	Only tasks with no Actual Completion Date value are included.

Similarly to Applications, within the Licence Letters option under the Letter Extract parameter option in the Licensing >> Licensing Parameters menu item, the following extract list types are now available:

MEMOS Licence Memos
TASKS Licence Tasks

Their fields, data sources and filter options correspond with those in Applications.

Some new fields have also been added to existing extract lists. The following fields are now available on the COND list within Applications:

Field	Source
App_Cond_Group_Code	Applications >> Application Parameters >> Condition Group >> Condition Group
App_Cond_Group_Descr	Applications >> Application Parameters >> Condition Group >> Description

The COND list is accessible from the following locations within the Applications >> Application Parameters menu option:

- Letter Extract >> Application Letters.
- Letter Extract >> Permit/Certificates.
- Inspection Parameters >> Extract Types.

The *App_Cond_Group_Code* and *App_Cond_Group_Descr* fields have also been added to the COND extract list in Licensing, accessible from the following locations within the Licensing >> Licensing Parameters menu option:

- Letter Extract >> Licence Letters.
- Inspection Parameters >> Extract Types.

The following fields are now available on the ALLAPPL (Applications on a Property Structure) list within Property Administration:

Field	Source
Work_Commenced_Date	Applications >> Application Maintenance >> Application Data >> Work Commenced
Work_Completed_Date	Applications >> Application Maintenance >> Application Data >> Work Completed
Work_To_Be_Commenced_By	Applications >> Application Maintenance >> Application Data >> To Be Commenced By

Work_To_Be_Completed_By	Applications >> Application Maintenance >> Application Data >> To Be Completed By
Application_Bld_Class	Path to associated extract type document based on list BLDCLASS (Building Classifications)
Application_Categories	Path to associated extract type document based on list MAJMIN (Major & Minor Categories)
Application_Fees	Path to associated extract type document based on list FEES (Application/Contribution Fees)
Application_Memos	Path to associated extract type document based on list MEMOS (Application Memos)
Application_Misc_Data	Path to associated extract type document based on list MISCDATA (Miscellaneous Application Data)
Application_References	Path to associated extract type document based on list REFERENC (Application References Extract List)
Application_Tasks	Path to associated extract type document based on list TASKS (Application Tasks)

The filter options for this list have been updated to allowing filtering by location link type and application status. The *Location Link Type* field on the Applications Filter Maintenance form allows the following values:

Value	Meaning
All	Application details will be included in the list regardless of whether the relevant property is a primary or secondary location.
Primary Only	Application details will only be included in the list if the relevant property is the primary location.

There is also a select/remove control for application statuses. If no statuses are selected, applications of all statuses are returned. Otherwise, only those with statuses matching the selected ones are returned.

Similarly to Applications, the following fields are now available on the ALLLIC (All Licences on a Property and Sub-Properties) list within Property Administration:

Field	Source
Licence_Categories	Path to associated extract type document based on list MAJMIN (Major & Minor Categories)
Licence_Fees	Path to associated extract type document based on list APPFEE (Licence Fees)
Licence_Memos	Path to associated extract type document based on list MEMOS (Licence Memos)
Licence_Misc_Data	Path to associated extract type document based on list MISCDATA (Miscellaneous Licensing Data)
Licence_References	Path to associated extract type document based on list REFERENC (Licence References Extract List)
Licence_Tasks	Path to associated extract type document based on list TASKS (Licence Tasks)

The ALLAPPL and ALLLIC extract lists are accessible from the Property Administration >> Property Parameters >> Certificate and Notice Parameters >> Extract Types Maintenance menu option.

Note: It is no longer necessary to associate extract types based on the WSREQUES or INFREQUES extract lists with a merge type in order to extract data from Pathway for LIM generation. Both of these extract lists will eventually be phased out.

Please refer to the Workflow User guide for more information on this option.

Application Lodgement

The following topic is covered in this section:

Lodgement Parameters

Lodgement Parameters

Further selections can be made as to what is to be applied upon Lodgement of the particular Application Type:

Details
Should a Cover Sheet be required for the particular Application Type, a Cover Sheet document name can be nominated from the list of existing Merge Type documents when the pop-up button is taken.
Procedure Details
The Procedure Code applicable to the particular Application Type should be nominated from the list of available Procedure Codes when the pop-up button is taken.

A Default and a Fast Track Procedure may be nominated. During Lodgement if the Fast Track Procedure check box is clicked on then the Fast Track Procedure will be loaded instead of the Default procedure.

Location Details
The application location details required should be flagged as appropriate for each Application Type:

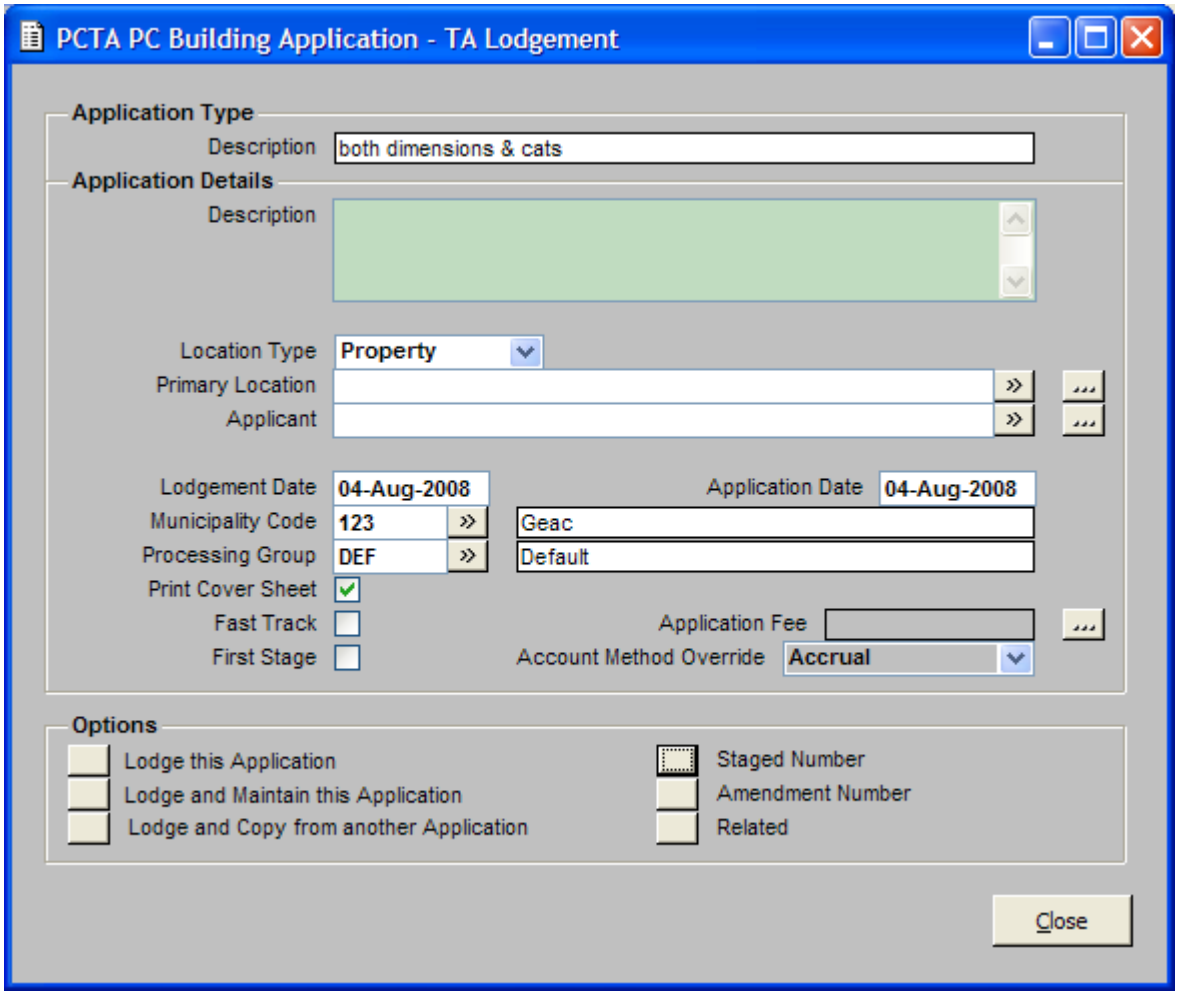
Application Fee Details
Should Application Fees be mandatory for this Application Type, the fees Mandatory field should be flagged, in addition to the method of calculation ie. Dimensions, Building Classification and Development Category.

Lodgement Form

The Lodgement Form is designed to allow the processing of an Application. Procedures set up through parameters are used to lodge the Application. The Lodgement Form allows for Applications to be lodged as Staged, Amended or Shared Applications.

Note: If Consents are assigned on the Application Type to be loaded at Lodgement, the Consent Maintenance Form is displayed.

Additionally, upon entry into the Lodgement Form the Application Fee Field details the total dollar value of the Base Fees set against the Application Type. The amount does not include other factors such as Discount, Pro-rata, Dimensions or rounding. The Label on this field will change to Lodgement Fee once the User has selected the Detail Button and viewed or modified the Fees for the Application. The total dollar value that will be displayed when the Label is showing ‘Lodgement Fee’ will be the amount that is due for the Application taking into account any Discounts, Pro-rata, Dimension and Category calculations.



Lodgement Form

Staged and Amended processing works the following way when using these functions from within different Application Types.

The Stage and Amendment numbers go down to a type level therefore it includes the type and year when creating the new number across types using the same numbering code.

The following are some scenarios of how it will work:

The examples are based on having set-up the number, year and type in the numbering code to display on the summary form etc.

This will relate to customers that use the same numbering code across multiple Application Types.

Original Number Selected to Stage	Staging The Application the first time and then subsequent times (this depends on how you have your first stage. Some sites have first stage as zero)	Comments: The Staged Numberings will always flow from 1 onwards by each separate type now.
123/2002/**DA**	123/2002/DA/1	
	123/2002/DA/2	
	123/2002/DA/3	
	123/2002/DA/4	
123/2002/**COU**	123/2002/COU/1	
	123/2002/COU/2	
	123/2002/COU/3	
	123/2002/COU/4	

123/2002/**BA**	123/2002/BA/1	
	123/2002/BA/2	
	123/2002/BA/3	
	123/2002/BA/4	
123/**2001**/DA	123/2001/DA/1	** Please note that regardless of the year that you are staging the application in the year that will be displayed as the number will always come from the original number format not what the year is currently set at in your numbering code. Eg. This application was originally lodged in 2001 however it may not have been staged till 2002 or even later, but will always use the formatted number of the original number to display. The lodgement date will verify the actual date the Application was Staged.
	123/2001/DA/2	
	123/2001/DA/3	
	123/2001/DA/4	
123/**2001**/COU	123/2001/COU/1	
	123/2001/COU/2	
	123/2001/COU/3	
	123/2001/COU/4	
Original Number Selected to Amended	Amending the Application the first time and then subsequent times	Comments: The Amended Numberings will always flow from A onwards by each separate type now.
123/2002/**DA**	123/2002/DA/A	
	123/2002/DA/B	
	123/2002/DA/C	
	123/2002/DA/D	
123/2002/**COU**	123/2002/COU/A	
	123/2002/COU/B	
	123/2002/COU/C	
	123/2002/COU/D	
123/**2001**/DA	123/2001/DA/A	** Please note that regardless of the year that you are Amending the application in the year that will be displayed as the number will always come from the original number format not what the year is
	123/2001/DA/B	
	123/2001/DA/C	
	123/2001/DA/D	
123/**2001**/COU	123/2001/COU/A	
	123/2001/COU/B	
	123/2001/COU/C	

	123/2001/COU/D	currently set at in your numbering code. Eg. This application was originally lodged in 2001 however it may not have been amended till 2002 or even later, but will always use the formatted number of the original number to display. The lodgement date will verify the actual date the Application was Amended.
Selecting a different Type to Lodgement. eg Lodgement type is **DA**	Staged Type becomes	
123/2001/**BA**	123/2001/**DA/1**	Lodgement type is **DA**
	123/2001/**DA/2**	
	123/2001/**DA/3**	
	123/2001/**COU/1**	Lodgement type is **COU**
	123/2001/**BA/1**	Lodgement type is **BA**
	123/2001/**BA/2**	
Selecting a different Type to Lodgement. eg Lodgement type is **DA**	Amended Type becomes	
123/2001/**BA**	123/2001/**DA/A**	Lodgement type is **DA**
	123/2001/**DA/B**	
	123/2001/**DA/C**	
	123/2001/**COU/A**	Lodgement type is **COU**
	123/2001/**BA/A**	Lodgement type is **BA**
	123/2001/**BA/B**	

Application Type
An Application Type is a predefined Code that can have linked pre-defined parameters for a specific type of Application. Any number of Application Types can be set up according to the Councils requirements.

This field displays the Application Description.

Description
The description fully details the Code of the Application Type.

Location Type
The Location Type describes if the Application is to be Lodged against a Property a Parcel or Street.

Primary Location

The Primary Location is the main location that an Application is lodged against. An Application may have more than one location, but this field details the location that will be used as the main basis for the Application.

A Location may be keyed directly into the field, or the detail button used to Search for an existing Location.

Application Lodgement will allow the Location to be created with a new street and suburb, if Authorities have been assigned to the User at the Property Module level. It will automatically update the Locations field on the Application Lodgement form with the newly created Property, Street/Suburb.

Applicant

The Applicant field will detail the name of the Person applying for the Application. This may be the Owner of the Property or any other person such as a Builder, Architect etc.

Lodgement Date

The Lodgement Date is the date that the actual Application is entered into the Computer System.

Application Date
The Application Date is the date that the person actually applied to the Council to have the Application processed.

Municipality Code

The Municipality Code can be entered into this field if required.

Processing Group

The Processing Group Details which Group within the Council will process the Application Type. The Council may be split into several different Offices or may have particular groups of people to deal with different types of Applications.

A Processing Group 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 Processing Group and the Processing Groups Description.

Print Cover Sheet
The Option of Printing a Cover Sheet allows Council Staff to have a written summary of the Application. This is usually attached to the front of the particular Application Folder for handy reference. This Cover Sheet may be as detailed or summarised as required.

Fast Track
The Fast Track option is designed to allow Council Officers to process simple Applications “on the spot” and have the Consent letter produced immediately. Selecting this check box will allow this processing. If the check box is not selected the Application will proceed with normal Lodgement procedures.

First Stage
The display of the First Stage option is controlled by the Lodgement Parameters within the Application Type Parameters. This allows the User to nominate if this is the First Stage of the application or not. If the Lodgement Parameters have been set to be First Stage of One then upon entry into this form this field is displayed for the User to nominate whether the Application being entered is the First Stage.

If the Default First Stage Parameter within the Lodgement Parameters has been flagged on then this field will display as flagged on automatically so that the User does not have to remember to flag the field on.

The field is still able to be maintained by the User if it is required to be changed from the Default Setting.

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 Application then the Account Method field will become non-editable and will not be able to be changed.

NOTE:- When the Account Method for an Application has been set to Pathway Debtors then it is necessary for any Receipts to be raised against the Debtor Invoice and not against the Application. These Receipts will need to be created as DAP type Receipts with the Payment Reference being nominated in the Qualifier field. It will not be possible to receipt directly to the Application.

Application Fee / Lodgement Fee

Upon entry into the Lodgement Form the Application Fee Field details the total dollar value of the Base Fees set against the Application Type. The amount does not include other factors such as Discount, Pro-rata, Dimensions or rounding. This amount will be added to the Application as it is lodged. The User is able to

detail out to the actual Application Fee screen and insert any other fees that may be required and have not been set as a default.

The Label on this field will change to Lodgement Fee once the User has selected the Detail Button and viewed or modified the Fees for the Application. The total dollar value that will be displayed when the Label is showing 'Lodgement Fee' will be the amount that is due for the Application taking into account any Discounts, Pro-rata, Dimension and Category calculations.

Lodge this Application
This button actually begins the Lodgement process once selected. The Lodgement will proceed to select any options set for the Application Type for data entry. A number for the Application will be produced on the screen. Once Lodgement is complete, a blank lodgement form will be presented to either Lodge another Application or you can Exit from this option.

Lodge and Maintain this Application
Selecting this button allows for the Application to be Lodged and then Proceed to the Application Summary Screen to select any options required to be maintained.

Lodge and Copy from another Application
Selecting this option allows the user to lodge an Application based upon a previously entered Application. The user will be asked which Class of Application they wish to use and then they will be able to search for and select a specific Application Number on which to base the copy from information.

The information to be copied is based on the settings in the Copy Application Parameters which are set up in the Application Class Parameters.

Staged Number
The Staged Application Button is designed to enable the Operator to select an Application that has previously been lodged and completed. This Application is now ready to begin the next "Stage". This new Stage will use the same number as the previous Application, but add another digit to the end of the number to distinguish the difference between the two. This new Stage of the Application will typically have a new Work Flow assigned to it.
For Example: A first Stage Application may be to clear and subdivide land. The second Stage may be to build units on this land.

The parameter setting for the Staged Application Type selected will determine if Conditions from the selected Application will be copied to the Staged Application. If this parameter ('Copy for a Stage Application' within Application Type Parameters) is flagged on for the Staged Application Type then any Conditions against the selected Application will be copied to the Staged Application. If the parameter is flagged off then the Staged Application will not have any Conditions copied to it from the selected Application.

Staged Applications are created as a related Link to the original Application selected for the Staged process. User is notified of the relationship via a Glyph being displayed on the Application Summary form. Selection of the Glyph will display the related applications form.

Amendment Number
An Amended Application as with a Staged Application will use an Application that has previously been lodged, adding an alpha character to the end of the number to distinguish the difference between the first Application and this new Amended Application.
The Amended alpha character will be determined by the Program looking at the Application Number and Year of the Application Selected. It then determines from this what the last digit was record against it as an amendment then increments the character by one. For example if the last digit for the selection was '/A', then next Amendment entered will become '/B'.
An Amended Application would typically be set up to changed details on an Application or add information to it.
The Original Application is kept for reference and a complete new one is 'Added' using the same number and carries across the basic information from the previously lodged Application.

Amended Applications are created as a related Link to the original Application selected for the Amend process. User is notified of the relationship via a Glyph being displayed on the Application Summary form. Selection of the Glyph will display the related applications form.

Related

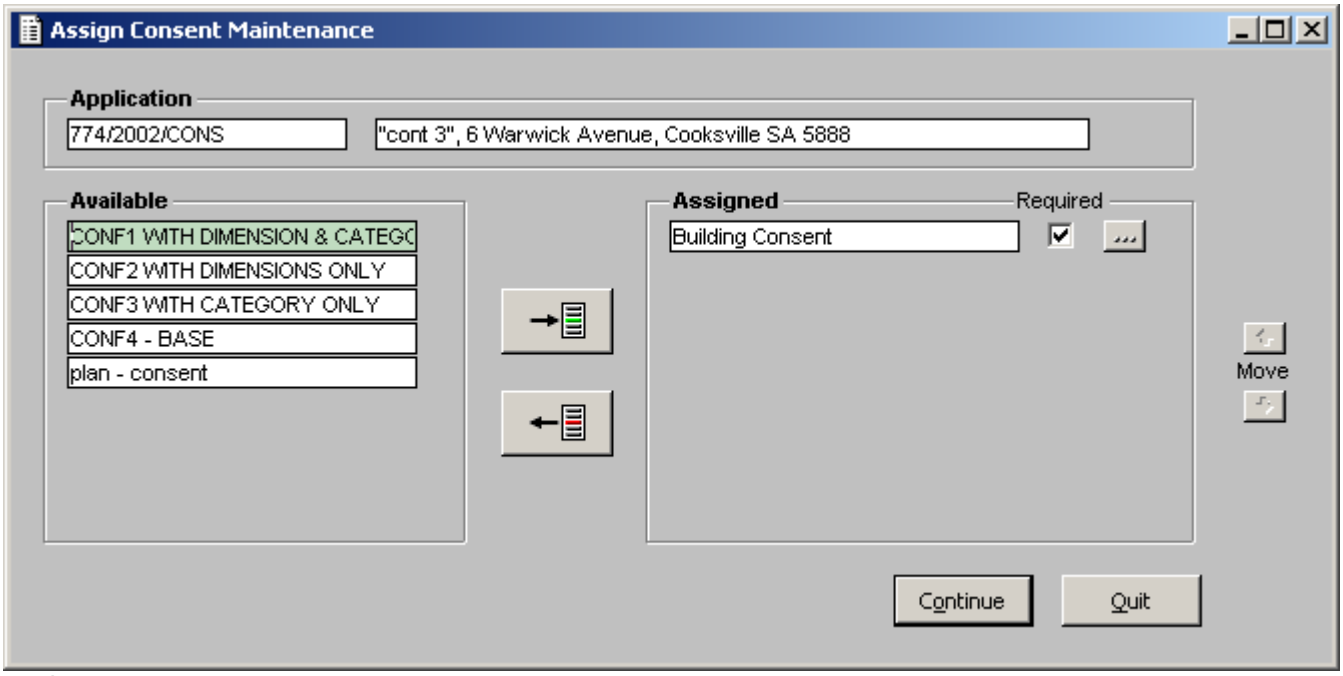
The Related Application Button is used to 'Associate' the Application being lodged with another existing Application. It allows for cross reference at a later date.

Related Applications are created as a related Link to the original Application selected for the Related process. User is notified of the relationship via a Glyph being displayed on the Application Summary form. Selection of the Glyph will display the related applications form.

Assign Consent Form

The Assign Consents Form allows the User to de-assign Consents that have been assigned at the Application Type level to be automatically included at Lodgement.

A Detail Button is available for each Consent. This enables the User to display Consent details and maintain relevant information eg. the Required flag can be checked off



Assign Consent Form

Application

These fields display the Application Number and Description.

Available

This field displays the Consents available to be Assigned to the Application.

Assigned

This field displays the Consents that have been Assigned to the Application.

Required

This field if checked on and there is no Approved Decision against the Consent it will prompt an 'Outstanding' message when the same Location is used to lodge a new Application.

If the field is checked off no 'Outstanding' message will be displayed at lodgement.

The detail button displays the Consents Maintenance Form.

History Take Up

The following topic are covered in this section:

History Take Up

History Take Up

History Take Up Form

This form allows for the addition of Applications that are not on the System but are required for Historic purposes.

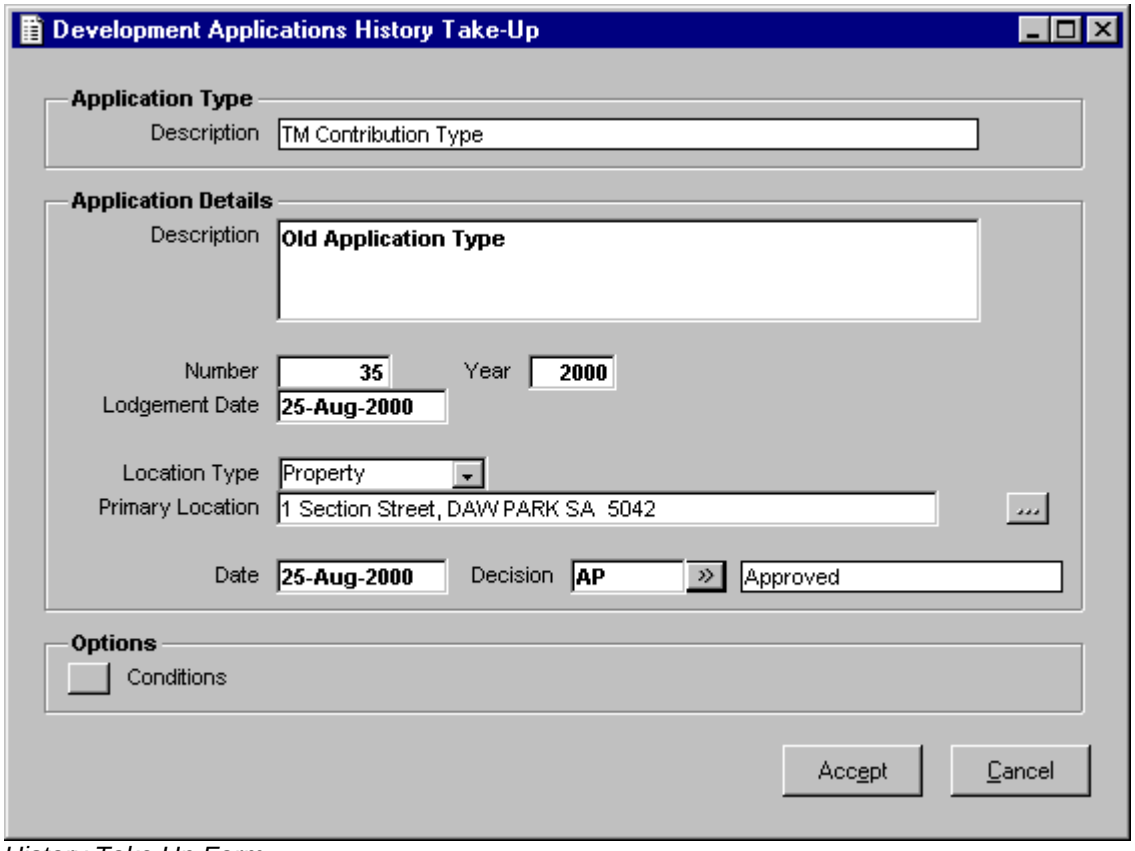
This is the only function that allows the creation of Application Numbers that were previously held in hard copy only.

Users are presented with the Application Class and Type prior to entering the Form. The Class and Type selected default onto the main History Take Up Form.

A Decision and Conditions may also be attached to the Application via the History Take Up Form.

A Parameter 'Check Existing Numbers' is available within the Application Parameters. This parameter controls the checking of Existing Numbers when entering in Applications via the History Take Up Menu.

If this is set on, when Applications of the Same Number exist as that being entered in History Take Up, the User will be presented with 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 Application 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

Application Type - Description

This field displays the Class Description and cannot be maintained.

Application Details - Description
This field is a free text field. Enter a description for the Application. Eg. Single Storey Alterations.

Application Details - Application Number
This field allows the entry of the required Application Number. A maximum of seven numeric characters may be entered.

Application Details - Year
This field allows the entry of the required Year

Application Details - Lodgement Date
The Application Lodgement Date is the date that the actual Application is entered into the Computer System.

Application Details - Location Type
The Location Type of Property is set as default. However the dropdown list allows for the options of Parcels or Street to be selected.

Application Details – Primary Location
The Primary Location is the main location that an Application is lodged against.

A Location may be keyed directly into the field, or the detail button used to Search for an existing Location.

Application Details - Date
This field allows a date to be keyed into the field or double clicking in this field will display the Date Pop Up Form.

Application Details - Decision
Enter a Decision Code if known or use the Pop Up Button to display the Decision Pop Up Form and select the required Decision.

Options - Conditions
Selecting the Conditions Button will display the Applications Conditions Maintenance Form.

Default Application Class

The following topic are covered in this section:

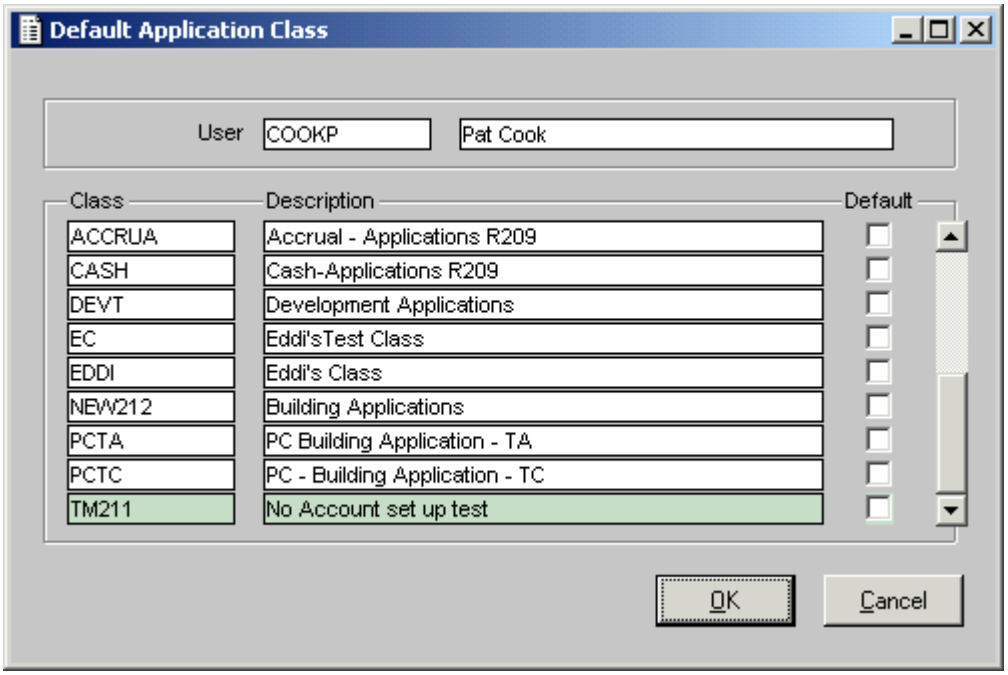
Default Application Class

Default Application Class

Default Application Class Form

The Default Application Class function allows for the permenant setting of a Default Application Class. When a new session is started the Default Application 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 Application Classes” is displayed when trying to access Maintenance / Parameters / Batch Functions.



Default Application 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 Application 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.

Contribution Indexation

The following topic are covered in this section:

Contribution Indexation

Contribution Indexation

The Contribution Fee Indexation enables Users to choose all or some of their Contribution Fees and have them increased or decreased by a specific value.

The increase or decrease will be applied to the Fees, Dimension and associated Development Categories Parameters. It will also check for Outstanding Fees associated with the fees selected and add a transaction to each, increasing or decreasing the fee by the required percentage.

Outstanding Fees refer to Fees that have not been receipted even if the receipt only partially paid off the fee.

NOTE: Where Contribution Fees are interfaced to the Pathway Debtors module no adjustements will be made to the actual Fee on the Application. Only the Parameter Contribution Fees will be updated. Fees on Applications will need to be changed manually.

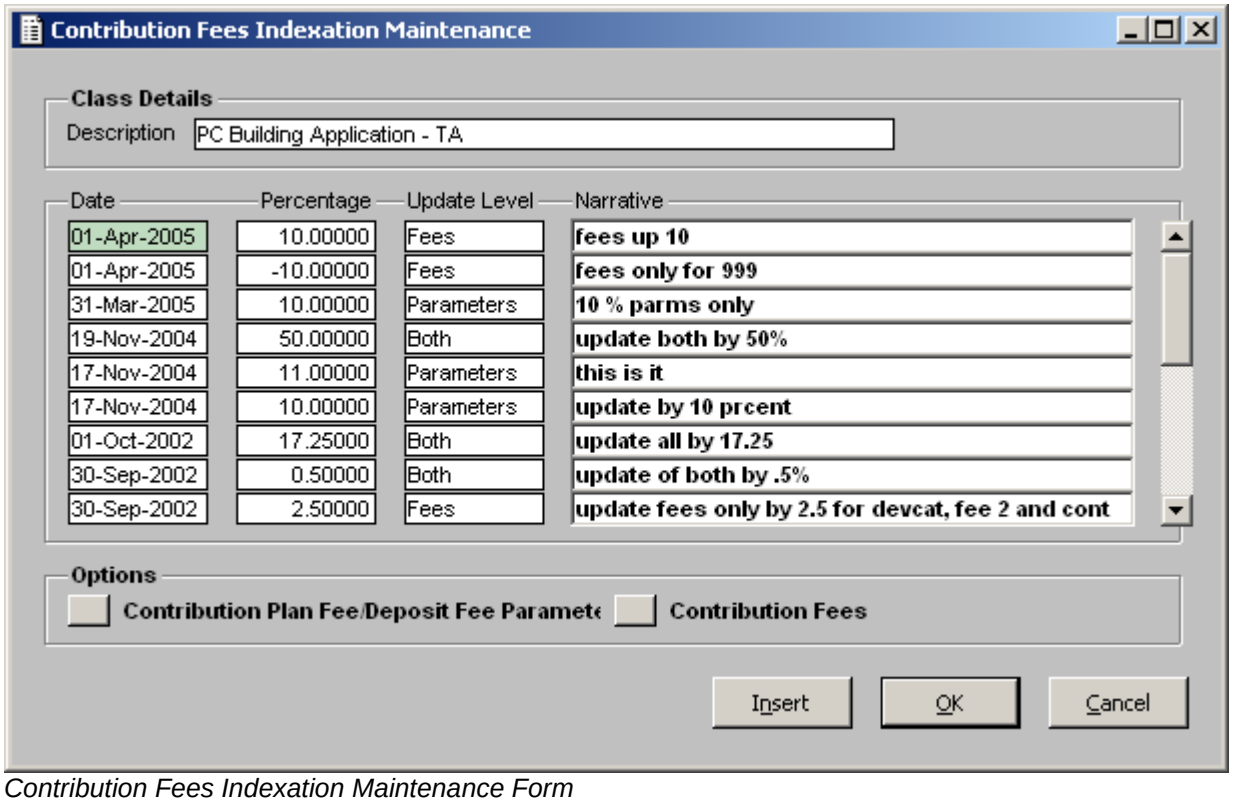
Contribution Fees Indexation Maintenance Form

This form displays Contribution Fees Indexation records. Selecting the Insert Button enables the entry of new Contribution Fees Indexation records.

Once the process has been completed the changes to each Contribution Fee can be viewed by highlighting the fee and selecting either the Contribution Fees or Contribution Plan Fees Parameter Option Buttons.

The Contribution Plan Fees Parameters Option will display all the parameters associated to the fee and the increased or decreased values. The Contribution Fees Option will display a list of all Applications that have had an increase or decrease against the relevant Fee.

NOTE: Where Contribution Fees are interfaced to the Pathway Debtors module no adjustements will be made to the actual Fee on the Application. Only the Parameter Contribution Fees will be updated. Fees on Applications will need to be changed manually.



Contribution Fees Indexation Maintenance Form

Class Details – Description
This field displays the Application Class Description. This field is display only and may not be maintained.

Date
This field displays the date of the Contribution Fee Indexation record. This field is display only and may not be maintained.

Percentage
This field displays the percentage that the Contribution Fee was increased or decreased by. This field is display only and may not be maintained.

Update Level
The Update Level displays the type of Indexation Update that has been done. The Level can be Both, Fees or Parameters.

Narrative
This field displays the narrative relating to the Contribution Fee. This field can be maintained.

Options – Contribution Plan Fee Parameters
Selecting the Contribution Plan Fee Parameters Option Button displays the Contribution Fees Indexation Enquiry Form.

Options – Contribution Fees
Selecting the Contribution Fees Option Button displays the Contribution Fees Enquiry Form.

Contribution Fees Indexation Entry Form

This form enables the entry of new Contribution Fees Indexation records.

The form allows Users to retain the default date selected or change the date to a forward date or backdate the record. If the function is processed again on the same day, the fees already updated will not be displayed.

If no Plan Details are selected then all Contribution Fees for the Class are displayed. When a Plan is selected then only the Contribution Fees associated to the Plan are displayed. Highlight each of the fees to be increased then select the OK Button.

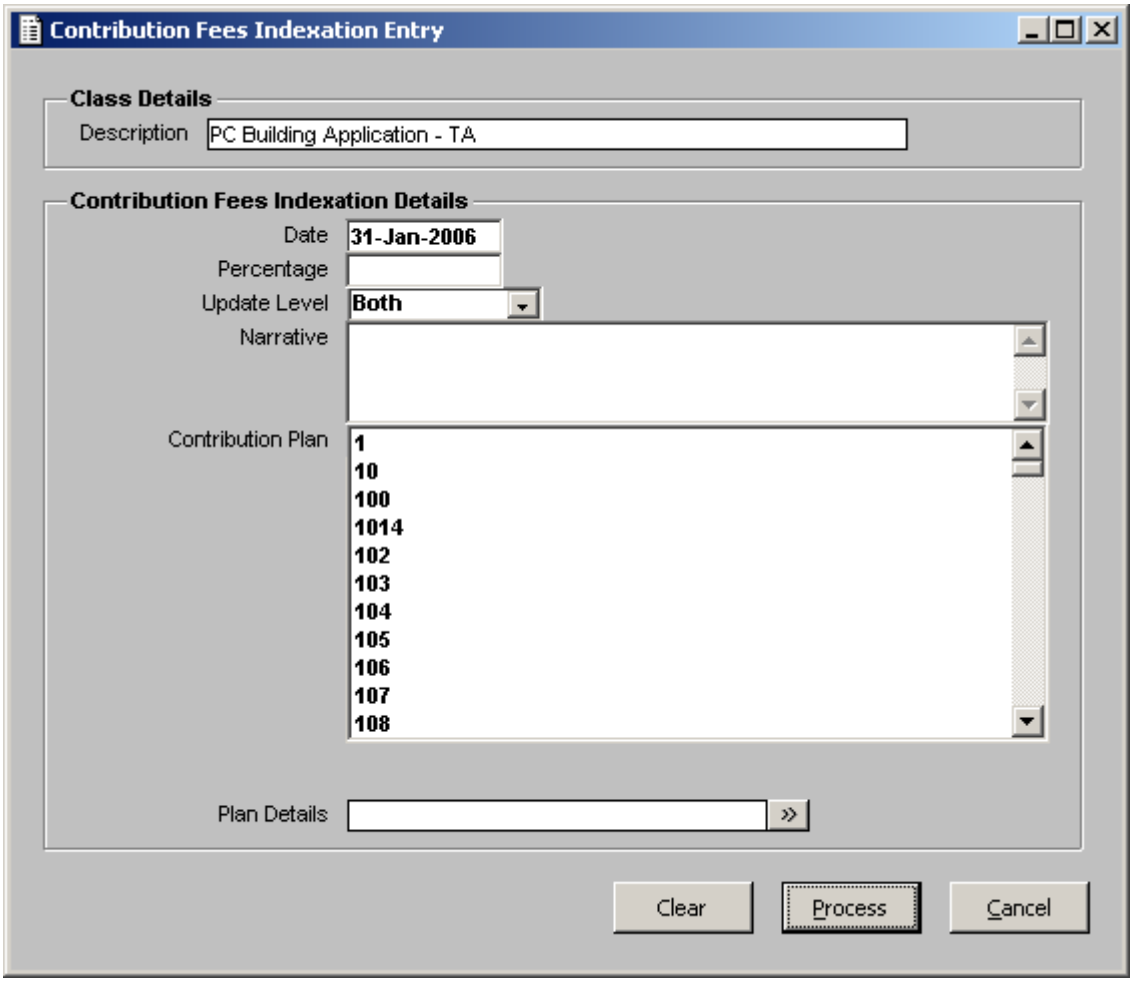
This will have the affect of increasing or decreasing the parameter values and increasing or decreasing those outstanding fees by the relevant percentage.

This process can be further refined to only update either the Parameters or the Fees. If Fees and Parameters are both required to be updated at the same time then the 'Both' option can be nominted in the Update Level field.

Once the process has completed the User will be returned to the Contribution Fee Indexation Maintenance Form.

This job can be run as a Submitted, Delayed or End of Day job by taking the Process button and selecting the required options from the dropdown button.

NOTE: Where Contribution Fees are interfaced to the Pathway Debtors module no adjustements will be made to the actual Fee on the Application. Only the Parameter Contribution Fees will be updated. Fees on Applications will need to be changed manually.



Contribution Fees Indexation Entry Form

Class Details – Description

This field displays the Application Class Description. This field is display only and may not be maintained.

Contribution Fees Indexation Details – Date

This field displays the defaulted system date. However the date can be changed to either post or pre-date the indexation. If the function is processed again on the same day, the fees already updated will not be displayed.

Contribution Fees Indexation Details – Percentage

Key a percentage into this field that the Contribution Fee is to be increased or decreased by. If a negative percentage is required then the minus sign is required to be entered with the percentage value.

Contribution Fees Indexation Details – Update Level

The Indexation process can be applied at Fees only, Parameters only or over Both. The Dropdown option available allows selection of the required Update Level. This is defaulted to Both upon entry into the this form.

Contribution Fees Indexation Details – Narrative

Enter an appropriate narrative.

Contribution Fees Indexation Details – Contribution Plan

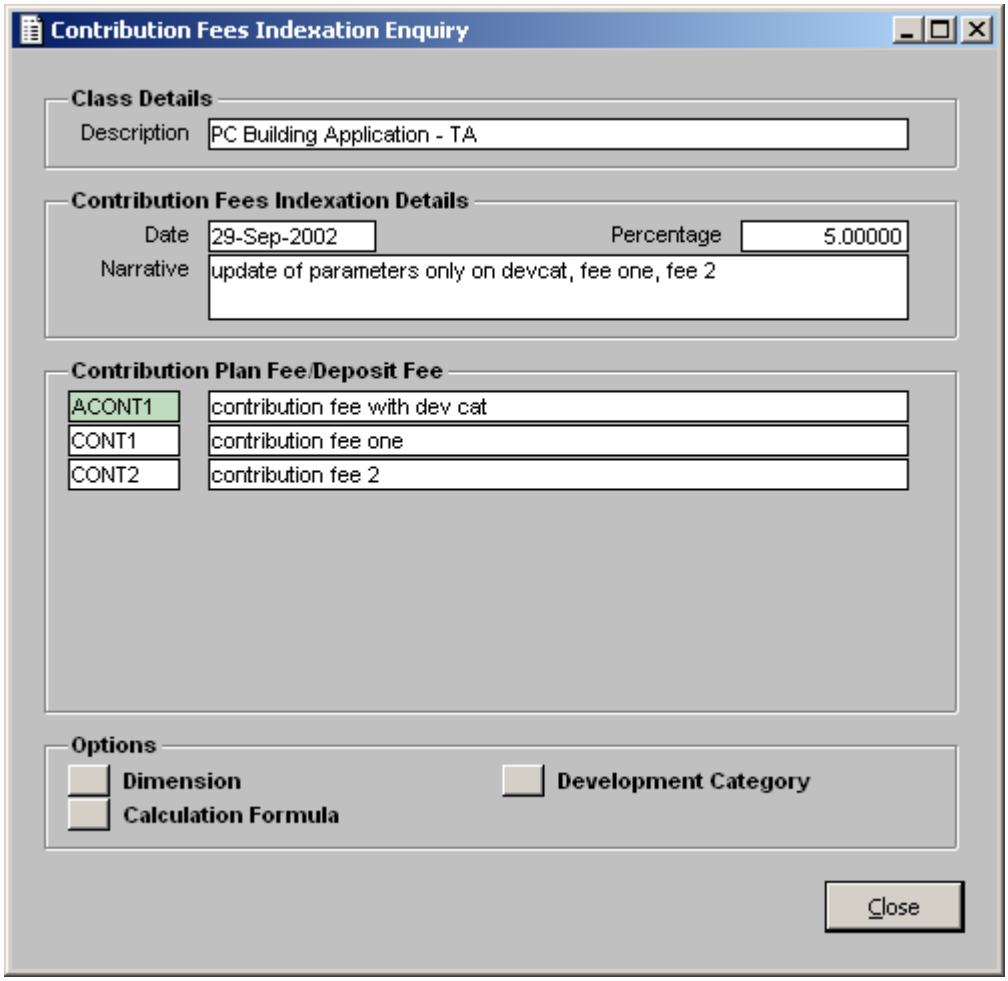
Highlight the Fee/Fees to be increased/decreased.

Contribution Fees Indexation Details – Plan Details

Click on the Plan Details Pop Up Button and selected the required Plan. Only those fees associated with the selected Plan will be displayed in the Contribution Plan section.

Contribution Fees Indexation Enquiry Form

The Contribution Fees Indexation Enquiry Form displays when the Contribution Plan Fee Parameters Option is selected from the Contribution Fees Indexation Maintenance form. It shows the value that the fee has been increased or decreased by.



Contribution Fees Indexation Enquiry Form

Class Details - Description

This field displays the Application Class Description. This field is display only and may not be maintained.

Contribution Fees Indexation Details – Date

This field displays the Contribution Fees Indexation Date This field is display only and may not be maintained.

Contribution Fees Indexation Details – Percentage

This field displays the Contribution Fees Indexation Percentage. This field is display only and may not be maintained.

Contribution Fees Indexation Details Narrative

This field displays the Contribution Fees Indexation Narrative. This field is display only and may not be maintained.

Contribution Plan Fee

This field displays the Contribution Plan Fee. This field is display only and may not be maintained.

Options – Dimension

Selecting the Dimension Option Button displays the Dimension Calculation Ranges Enquiry Form.

Options – Calculation Fomula

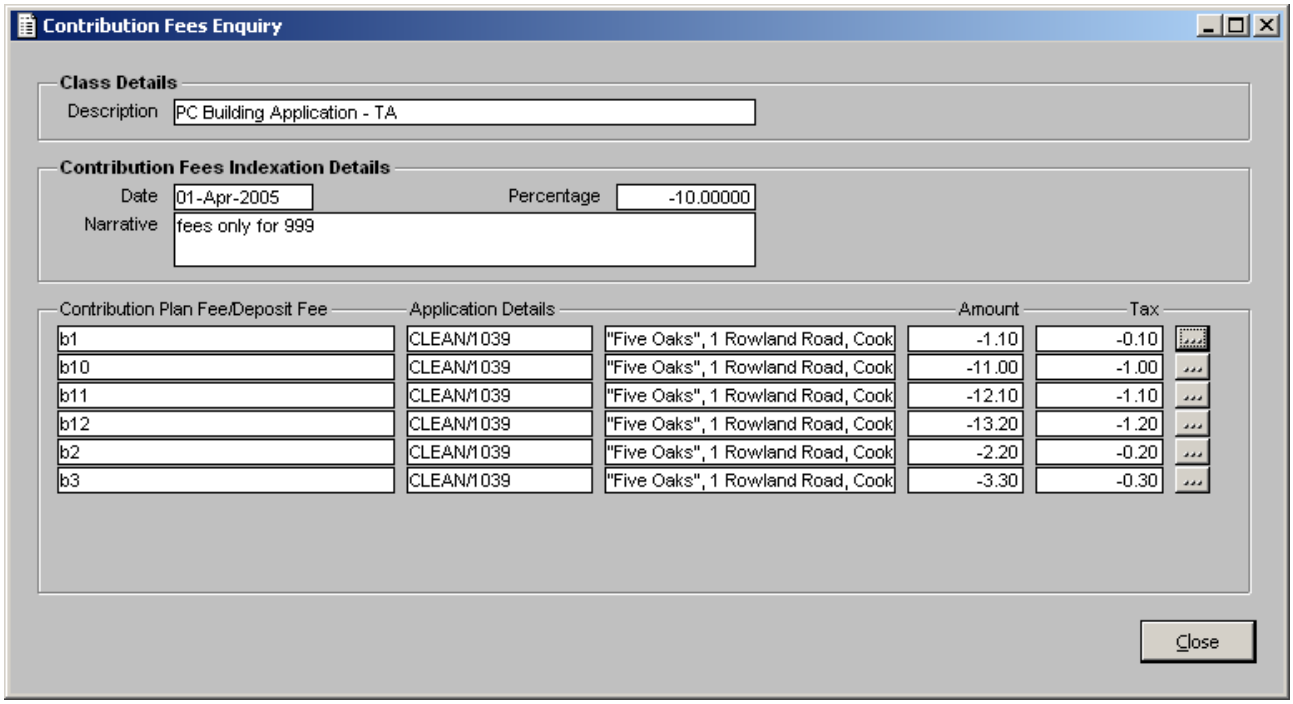
Selecting the Calculation Formula Option Button displays the Calculation Formula Enquiry Form.

Options – Development Category

Selecting the Development Category Option Button displays the Development Category Enquiry Form.

Contribution Fees Enquiry Form

The Contribution Fees Enquiry Form displays when the Contribution Fees Option is selected from the Contribution Fees Indexation Maintenance form. It shows the Application Fees that have been increased or decreased by the indexation process.



Contribution Fees Enquiry Form

Class Details – Description

This field displays the Application Class Description. This field is display only and may not be maintained.

Contribution Fees Indexation Details – Date

This field displays the Contribution Fees Indexation Date This field is display only and may not be maintained.

Contribution Fees Indexation Details – Percentage

This field displays the Contribution Fees Indexation Percentage. This field is display only and may not be maintained.

Contribution Fees Indexation Details – Narrative

This field displays the Contribution Fees Indexation Narrative. This field is display only and may not be maintained.

Contribution Plan Fee

This field displays the Contribution Plan Fee. This field is display only and may not be maintained.

Application Details

These fields display the Application Number and the Application Location. This field is display only and may not be maintained.

Amount

This field displays the Amount the Fee has been increased or decreased by. This field is display only and may not be maintained.

Tax

This field displays the Amount of Tax the Fee has been increased or decreased by. This field is display only and may not be maintained.

Detail Button

Selecting the Detail Button displays the Application Summary Form in Enquiry mode.

Contributions Non-Cash

The following topics are covered in this section:

Contribution Non-Cash Types
Contribution Non-Cash Maintenance

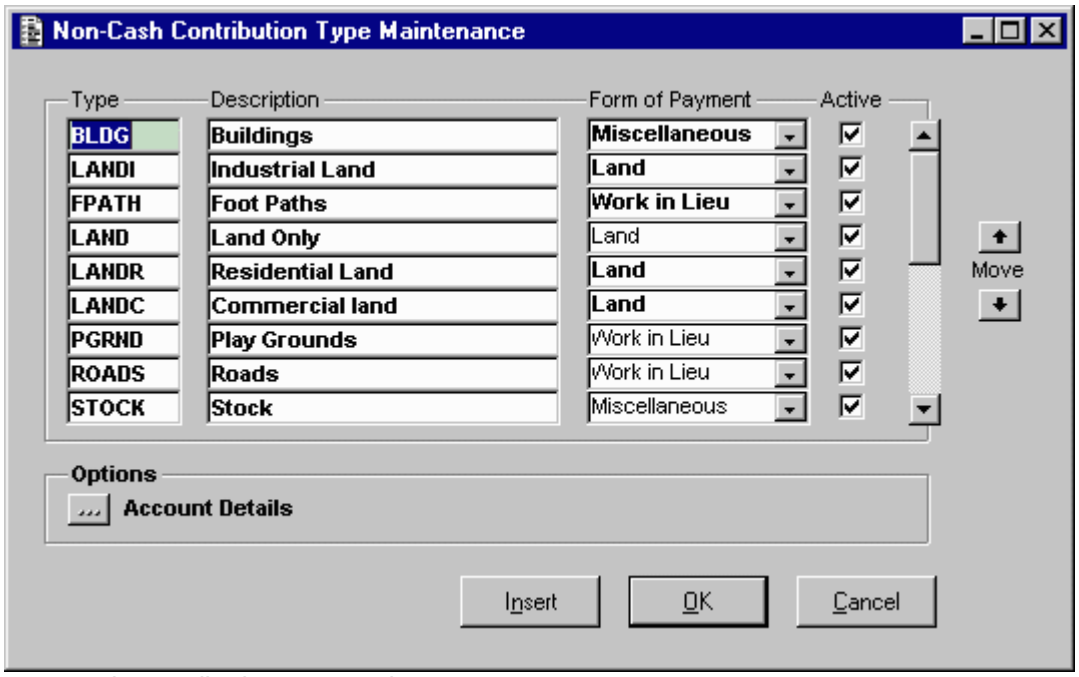
Contribution Non- Cash Types

Non-Cash Contribution Type Maintenance Form

Non-Cash Types can consist of;
- Land
- Work-In Lieu
- Miscellaneous

Only Non-Cash Payments where the Remaining Value is greater than zero may be selected.

Where no existing record is found for a nominated contributor INSERT will create a new 'Non-Cash Payment' number and a Non-Cash Type, which then can be selected.



Non-Cash Contribution Type Maintenance Form

Type
This field displays the Non-Cash Type Code.

Description
This field displays the Non-Cash Type description.

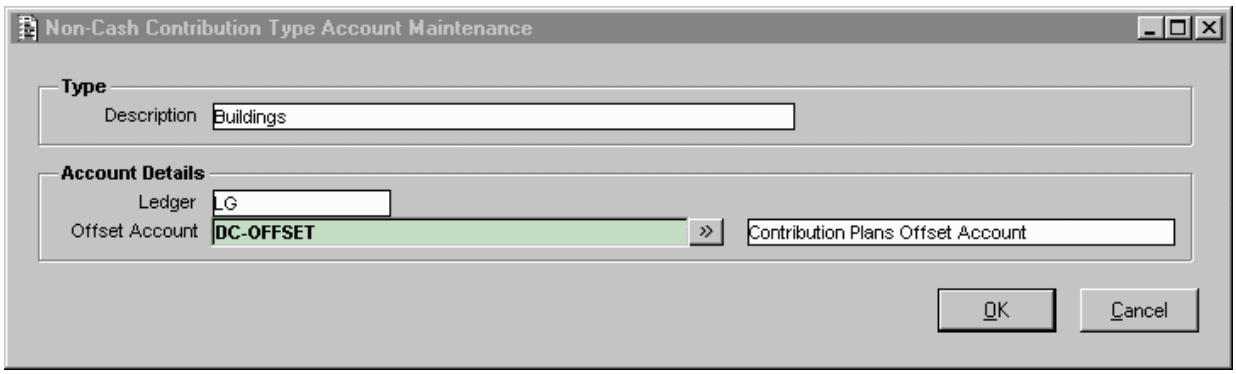
Form of Payment
Use the dropdown button to select a form of payment eg.
- Land
- Work-In Lieu
- Miscellaneous

Active
When this box is check on the Non-Cash Type is available for selection. If the box is check off then the Non-Cash Type is no longer available for selection.

Options – Account Details
Selecting the button will display the Non Cash Contribution Type Account Maintenance form.

Non-Cash Contribution Type Account Maintenance Form

An Offset Account is used to manage the non-cash payments. This account will carry the entry under both accrual and cash modes.



Non-Cash Contribution Type Account Maintenance Form

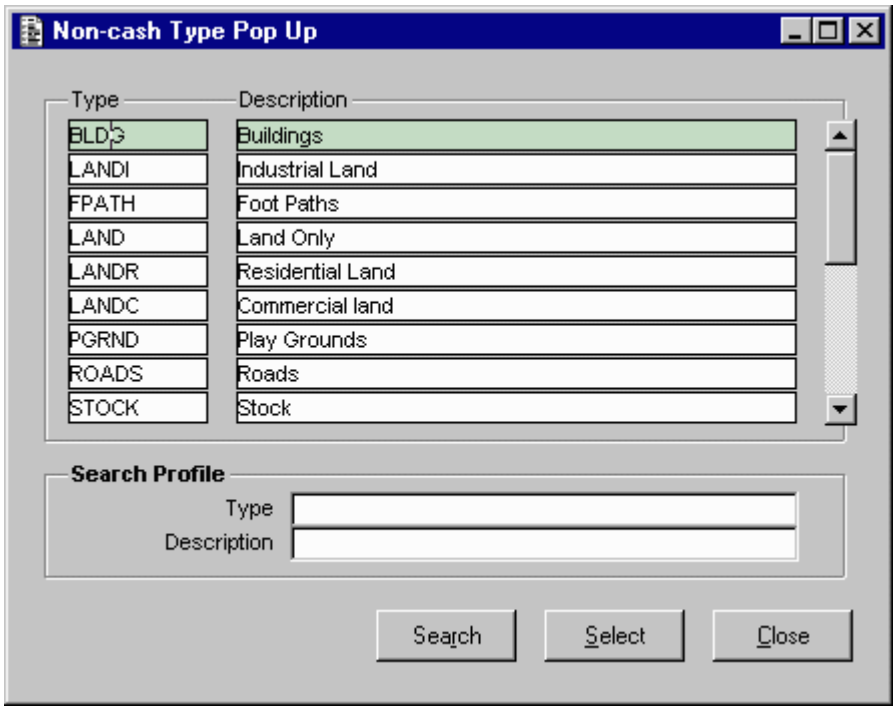
Type – Description
This field displays the Non-Cash Contribution Type description.

Account Details – Ledger
This field displays the Ledger.

Account Details – Offset Account
Select the Pop Up button and an offset Account can be selected from the Accounts Pop Up form

Contribution Non-Cash Maintenance

Non-Cash Type Pop Up Form



Non-Cash Type Pop Up Form

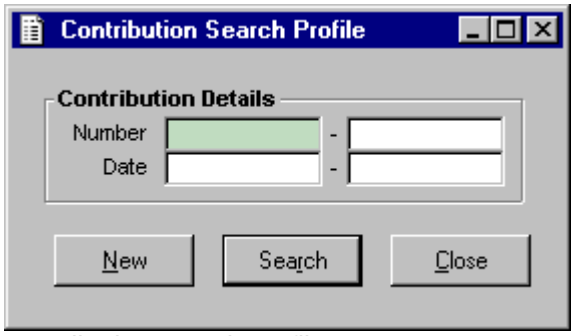
Type
This field displays the Non-Cash Type Code.

Description
This field displays the Non-Cash Contribution Type description.

Search Profile – Type
Enter a Non-Cash Contribution 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.

Contribution Search Profile Form



Contribution Search Profile Form

Non-Cash Number

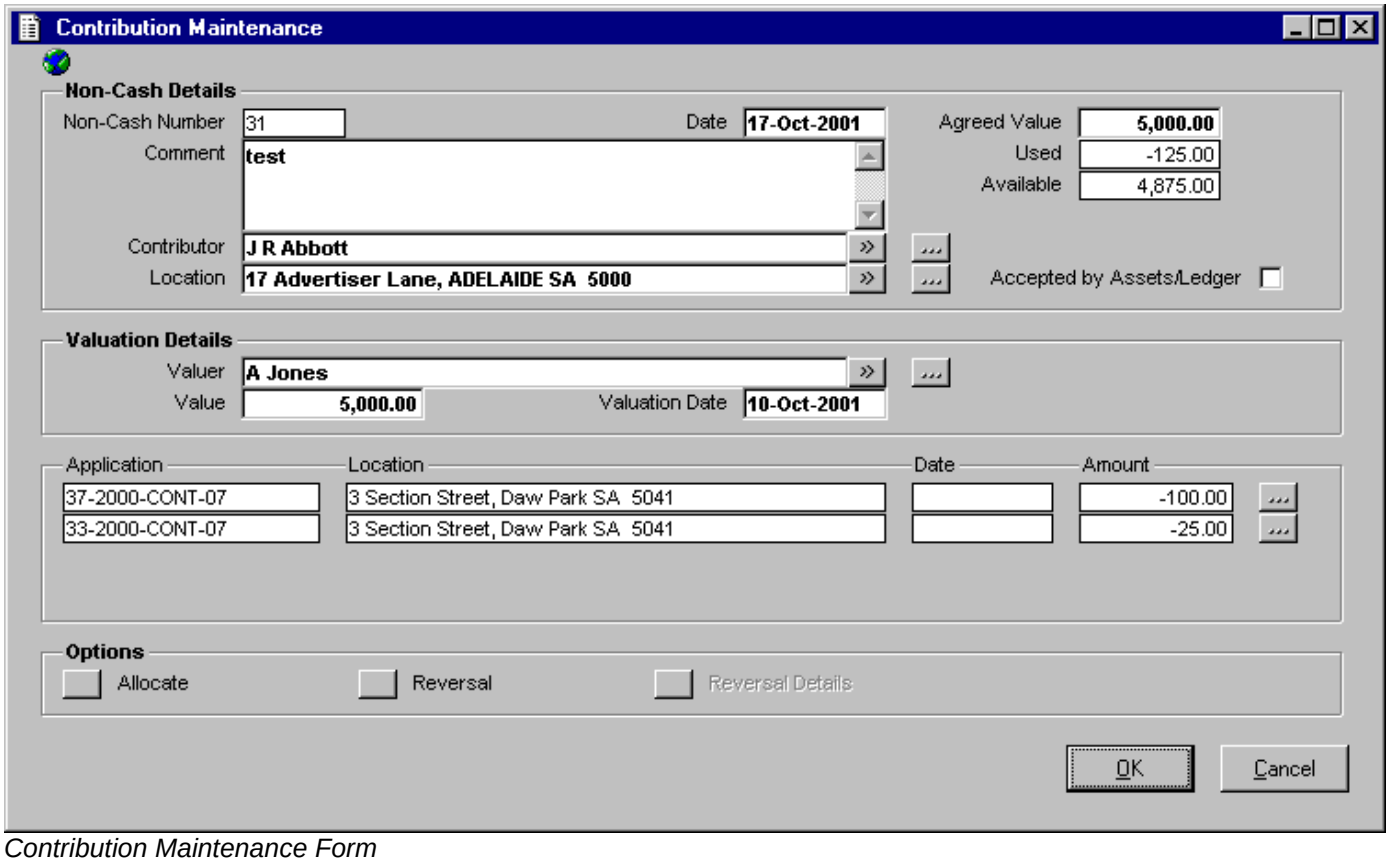
Enter a Non-Cash Contribution Number range (or part thereof) on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

Date

Enter a Date range (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.

Contribution Maintenance Form

Maintaining Non-Cash Contributions may be done either via this form or directly from the application in question. This form is only displayed when using Land Non-Cash Type.



Contribution Maintenance Form

Non-Cash Details – Non-Cash Number

This field displays the Non-Cash Number and cannot be maintained.

Non-Cash Details – Date

This field displays the Date.

Non-Cash Details – Agreed Value
This field displays the Agreed Value for the Non-Cash Contribution.

Non-Cash Details – Used
This field displays the Used amount for the Non-Cash Contribution.

Non-Cash Details – Available
This field displays the Available amount for the Non-Cash Contribution.

Non-Cash Details – Comment
This field allows Users to enter free form Comments relating to the Non-Cash Contribution.

Non-Cash Details – Contributor

Selecting the Pop Up button enables the User to select a Contributor or create a New Contributor. This field is mandatory.

Non-Cash Details – Location

This field is only available if the Non-Cash Contributions are Land Only. The location displayed is the property given to Council as a Non-Cash Contribution.

Accepted by Assets/Ledger
When this check box is checked on it will signify when the Council has accepted the Contribution as an Asset.

Checking this flag does not in any way link to any Accounting or Assets module and is simply a way for Councils to note this. It can be reported on so that the appropriate Financial department can be made aware of it.

This check box has been initialised to false (Not Accepted by Assets) for all Contributions. This flag will need to be updated where this is not the case.

Valuation Details – Valuer

This field displays the name of the Valuer. If a Valuer is selected then all other Valuation Details must be entered.

Valuation Details – Value
This field displays the Value of the Non-Cash Contribution. If a Value is entered all other Valuation Details must be entered.

Valuation Details – Valuation Date
This field displays the Valuation Date. If a Valuation Date is entered all other Valuation Details must be entered.

Application Location Date Amount

These fields display the Application Number, Location, Date and Amount associated with any fund transactions.

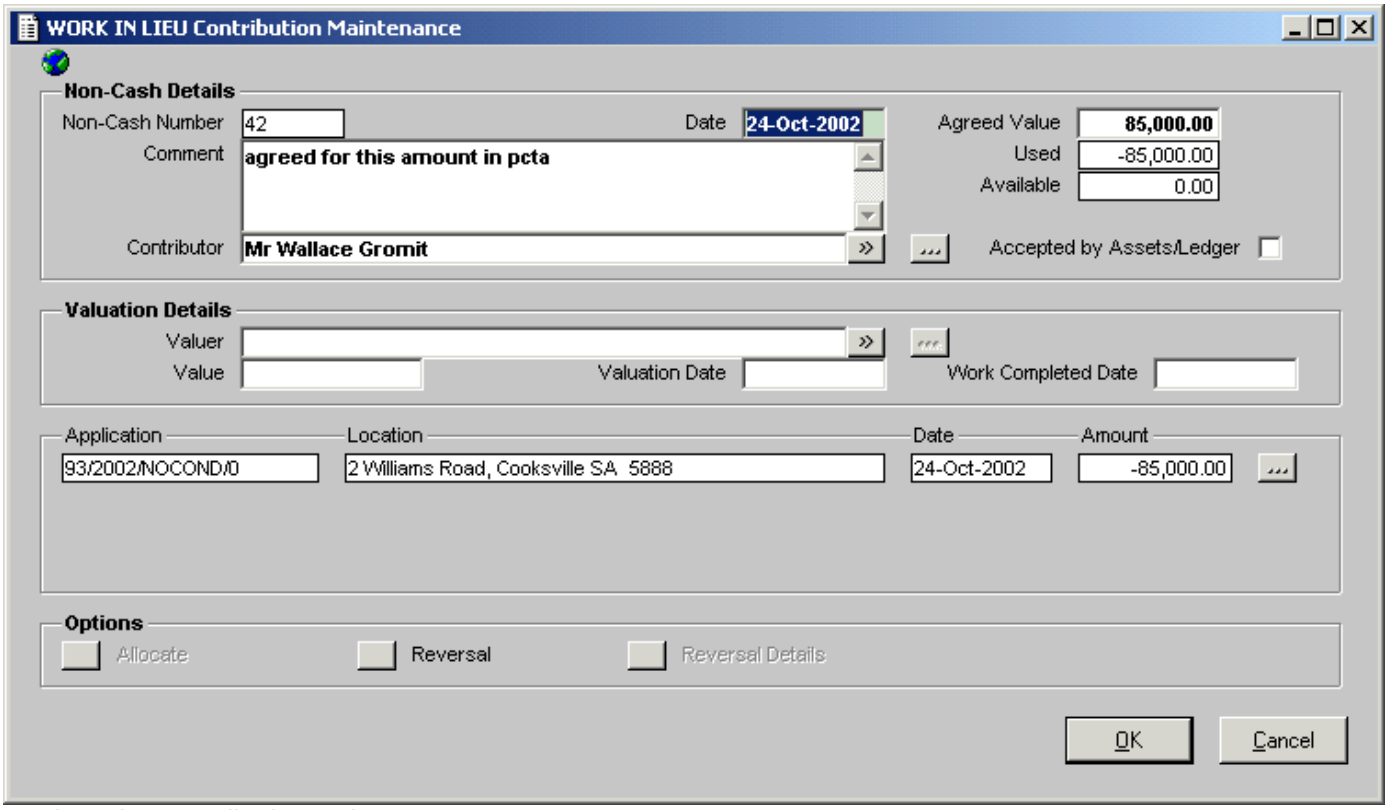
Options – Allocate
Selecting the Allocation option will display the Class Pop Up form.

Options – Reversal
Focus on a transaction if the Reversal button is bold the transaction can be reversed.

Options – Reversal Details
Once an Application Allocation has been reversed the Options – Reversal Details button can be selected to display the Reason that was entered when the Reversal was performed.

Work In Lieu Contribution Maintenance Form

Maintaining Non-Cash Contributions may be done either via this form or directly from the application in question. This form is only displayed when using the Work or Miscellaneous Non-Cash Type.



Work In Lieu Contribution Maintenance Form

Non-Cash Details – Non-Cash Number
This field displays the Non-Cash Number and cannot be maintained.

Non-Cash Details – Date
This field displays the Date.

Non-Cash Details – Agreed Value
This field displays the Agreed Value for the Non-Cash Contribution.

Non-Cash Details – Used
This field displays the Used amount for the Non-Cash Contribution.

Non-Cash Details – Available
This field displays the Available amount for the Non-Cash Contribution.

Non-Cash Details – Comment
This field allows Users to enter free form Comments relating to the Non-Cash Contribution.

Non-Cash Details – Contributor

Selecting the Pop Up button enables the User to select a Contributor or create a New Contributor. This field is mandatory.

Accepted by Assets/Ledger
When this check box is checked on it will signify when the Council has accepted the Contribution as an Asset.

Checking this flag does not in any way link to any Accounting or Assets module and is simply a way for Councils to note this. It can be reported on so that the appropriate Financial department can be made aware of it.

This check box has been initialised to false (Not Accepted by Assets) for all Contributions. This flag will need to be updated where this is not the case.

Valuation Details – Valuer

This field displays the name of the Valuer. If a Valuer is selected then all other Valuation Details must be entered.

Valuation Details – Value
This field displays the Value of the Non-Cash Contribution. If a Value is entered all other Valuation Details must be entered.

Valuation Details – Valuation Date
This field displays the Valuation Date. If a Valuation Date is entered all other Valuation Details must be entered.

Valuation Details – Work Completed Date
This field displays the Work Completed Date. This field is only available on this form if the Non – Cash Type was Work.

Application Location Date Amount

These fields display the Application Number, Location, Date and Amount associated with any fund transactions. The Detail Button can be selected to display the summary form for the Application if further information is required about the Application.

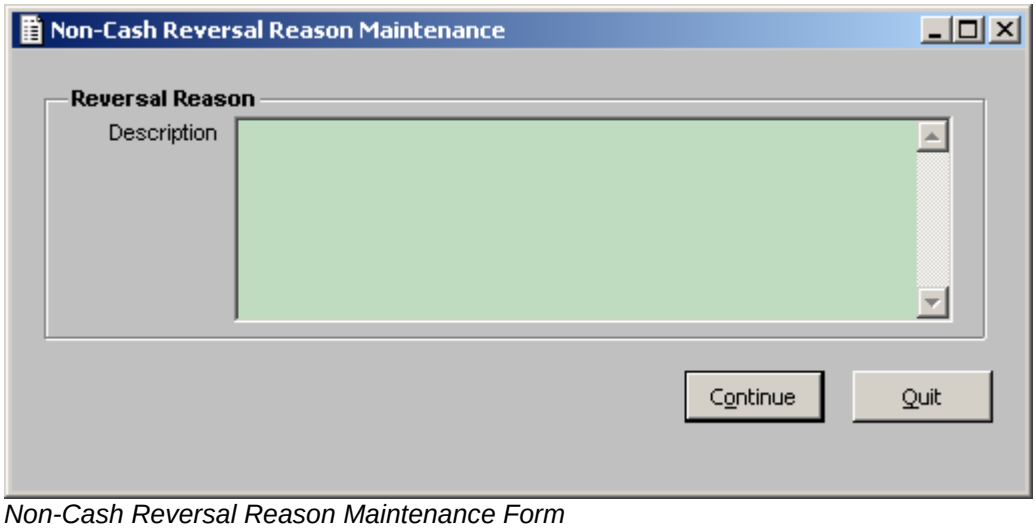
Options – Allocate
Selecting the Allocation Option will display the Class Pop Up form to allow selection of an Application to be allocated.

Options – Reversal
Focus on a transaction if the Reversal button is bold the transaction can be reversed. Once this has been selected then the Options – Reversal Details button will become available for use.

Options – Reversal Details
Once an Application Allocation has been reversed the Options – Reversal Details button can be selected to display the Reason that was entered when the Reversal was performed.

Non-Cash Reversal Reason Maintenance Form

This Form is displayed when the Reverse Option has been selected from the Non-Cash Contribution Maintenance form. It allows the entry of the Reason as to the Reversal. This form is only displayed when using the Work or Miscellaneous Non-Cash Type.



Non-Cash Reversal Reason Maintenance Form

Reversal Reason - Description
Enter in the Reason for the Reversal into this field.

Bank Guarantee

This function allows the addition and maintenance of one or more Bank Guarantees. Once a Bank Guarantee has been created then Application Fees can be apportioned to it. Bank Guarantees can be defined with Application Fees, or without Application Fees, with Contribution Fees or without Contribution Fees.

The following topic is covered in this section:

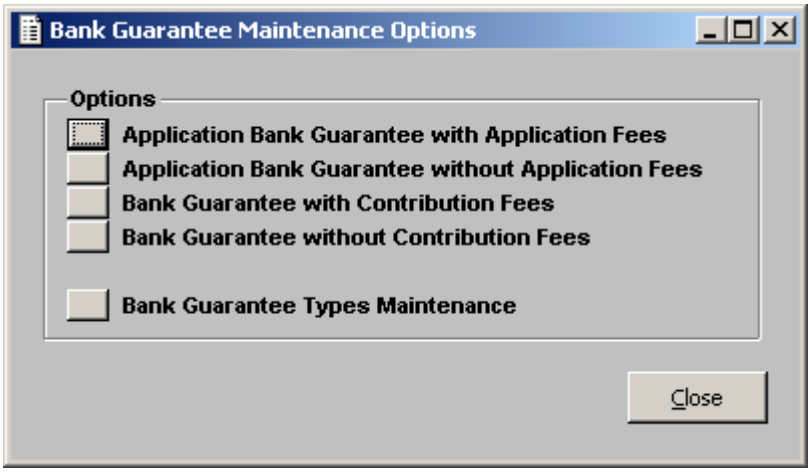
Bank Guarantee

Bank Guarantee

Bank Guarantee Maintenance Options Form

As Bank Guarantees can be defined with or without Application/Contribution Fees associated the User needs to nominate which type of Bank Guarantee they are going to add or maintain. Selection of the appropriate Option Button will display the Bank Guarantee Search Form.

Additionally Bank Guarantees can be assigned a Type to assist with reporting. Bank Guarantee Types are also maintained from this option.



Bank Guarantee Maintenance Options Form

Option – Application Bank Guarantee with Application Fees

Selection of the Application Bank Guarantee with Application Fees will display those Guarantees that have been created for use with Application Fees. Applications that have outstanding Application Fees are only allowed to be linked to Bank Guarantees via this option. It is also possible to create new Bank Guarantees from this option.

Option – Application Bank Guarantee without Application Fees

Selection of the Application Bank Guarantee without Application Fees will display those Guarantees that have been created and are linked to an Application and not the Application Fees. It is also possible to create new Bank Guarantees without Application Fees from this option.

Option – Bank Guarantee with Contribution Fees

Selection of the Bank Guarantee with Contribution Fees will display those Guarantees that have been created using Contribution Fees. It is also possible to create new Bank Guarantees with Contribution Fees from this option.

Option – Bank Guarantee without Contribution Fees

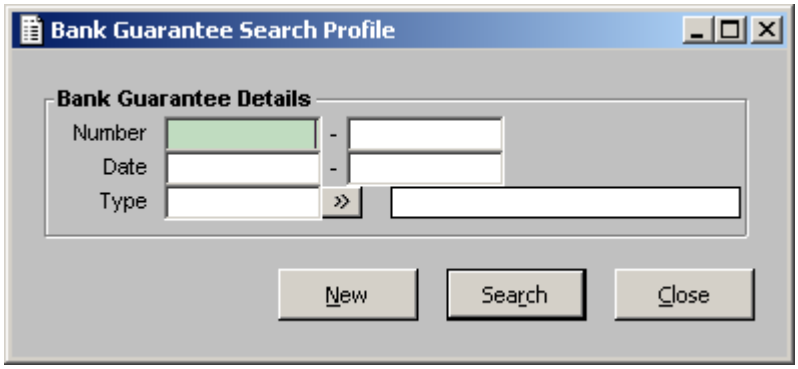
Selection of the Bank Guarantee without Contribution Fees will display those Guarantees that have been created without the use of Contribution Fees. It is also possible to create new Bank Guarantees without Contribution Fees from this option.

Option – Bank Guarantee Types Maintenance

Selection of the Bank Guarantee Types Maintenance form will display the Bank Guarantee Types that have been defined for use against Bank Guarantees and allow the maintenance of these Types.

Bank Guarantee Search Profile Form

The Bank Guarantee Search Profile Form allows for selection of a particular Bank Guarantee Number or range in conjunction with, if required a Date Range. Optionally if Bank Guarantee Types have been setup and used then Bank Guarantees can be found by a particular Type.



Bank Guarantee Search Profile Form

Bank Guarantee Details – Number

Enter a Bank Guarantee Number range (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.

Bank Guarantee Details – Date

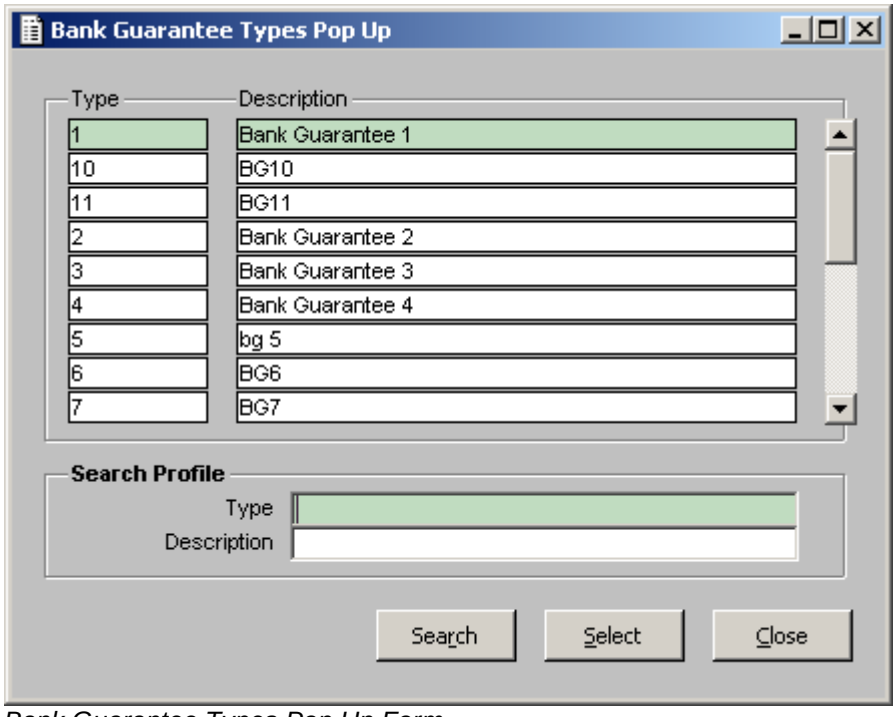
Enter a Date range (or part thereof) on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

Bank Guarantee Details – Type

If Bank Guarantee(s) for a particular Type are required to be found then the Bank Guarantee Type required can be entered into this field. If the Type is not known then the Pop Up can be used to display a list of available Bank Guarantee Types to search on.

Bank Guarantee Type Pop Up Form

The Bank Guarantee Pop Up Form allows for selection of a Bank Guarantee Type. The Search Profile area can be used to search for a particular Bank Guarantee Type if it is not included in the current display.



Bank Guarantee Types Pop Up Form

Type
The Bank Guarantee Type Code is displayed in this field.

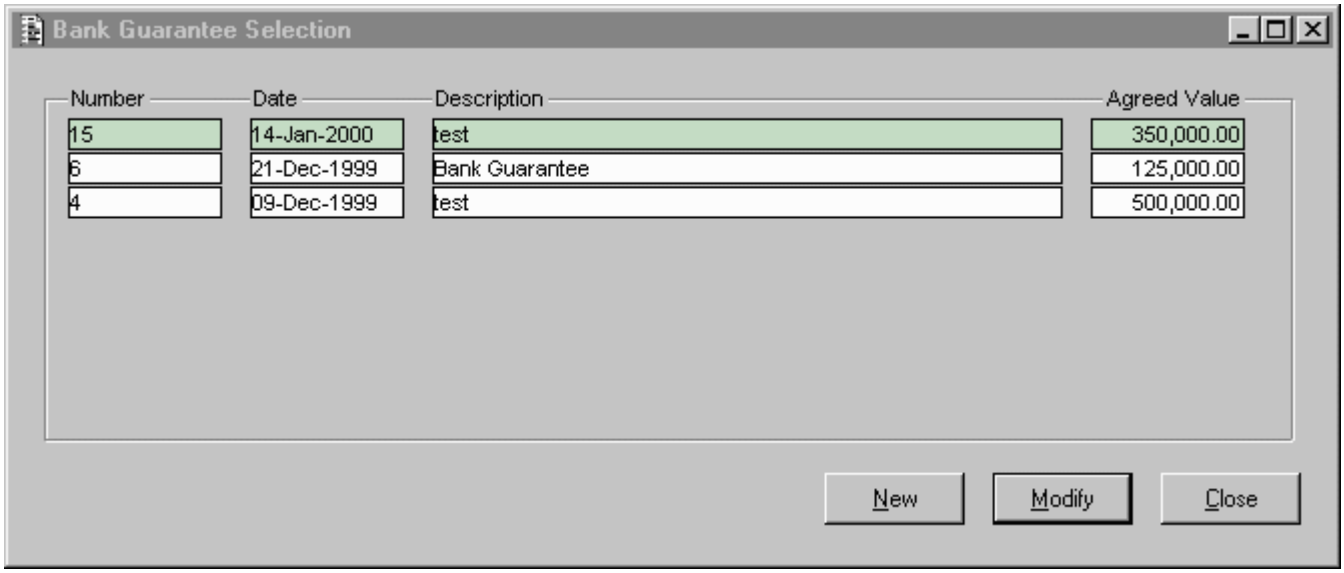
Description
The Description of the Bank Guarantee Type is displayed in this field.

Search Profile - Type
If a particular Type or Types are required to be searched for then the Type code or part thereof can be entered into this field. Wildcard searching is available to assist the search.

Search Profile - Description
If a particular Type or Types are required to be searched for then the Type Description or part thereof can be entered into this field. Wildcard searching is available to assist the search.

Bank Guarantee Selection Form

This function allows the addition or maintenance of a Bank Guarantee.



Bank Guarantee Selection Form

Number
This field displays the Bank Guarantee Number.

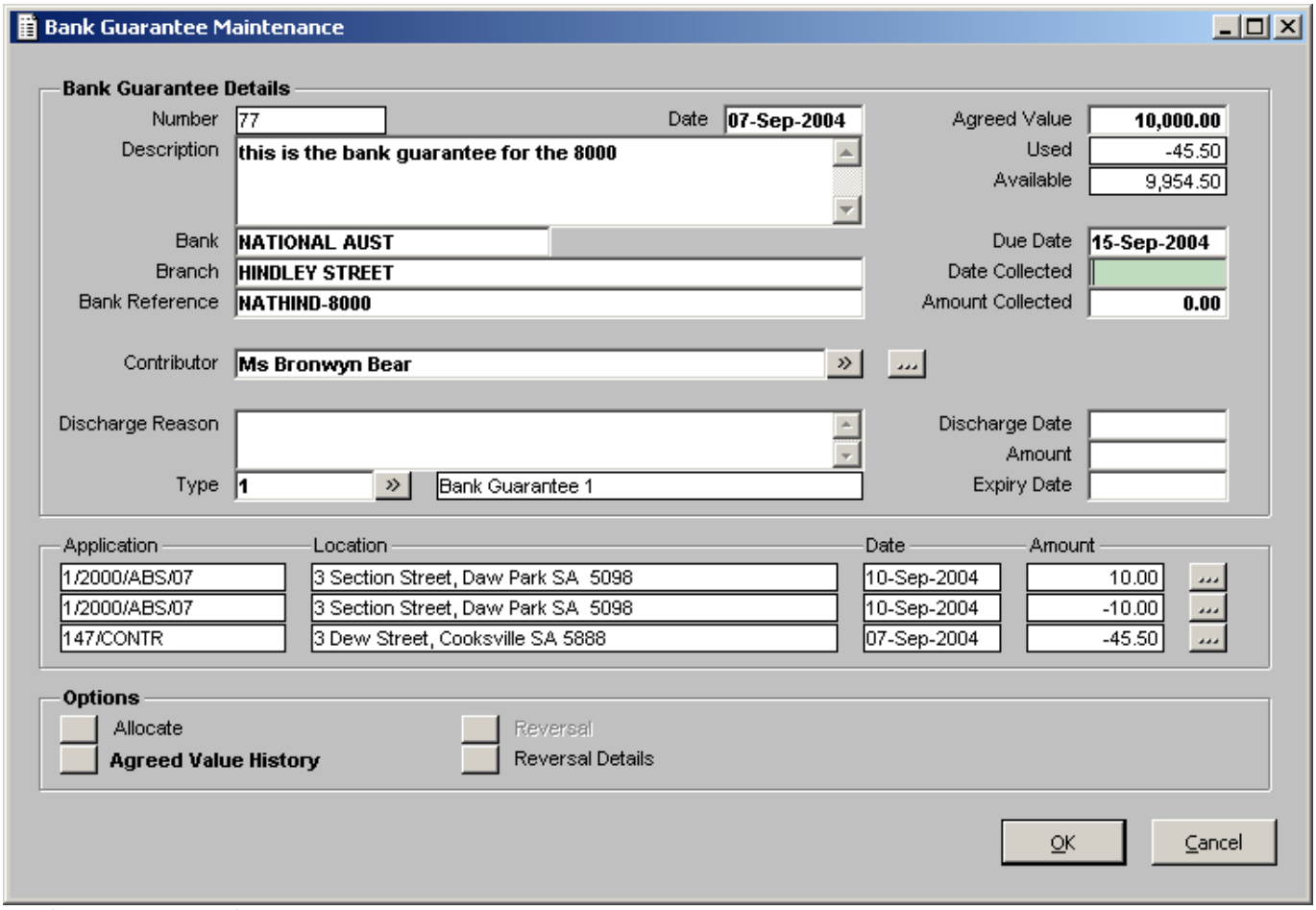
Date
This field displays the Date the Bank Guarantee was created.

Description
This field displays the description in full of the Bank Guarantee.

Agreed Value
This field displays the Agreed Value of the Bank Guarantee.

Bank Guarantee Maintenance Form

The Bank Guarantee Maintenance Form enables information relating to the Guarantee, the Contributor, Discharge Reason and the Application(s) linked to the Bank Guarantee to be maintained or entered. From this Form you are able to detail out onto the Application and see further information regarding the detail of the Application.



Bank Guarantee Maintenance Form

Number
This field displays the Bank Guarantee Number.

Date
This field displays the Date the Bank Guarantee was created.

Agreed Value
This field displays the Agreed Value of the Bank Guarantee.

Used
This field displays the monies Used of the Bank Guarantee.

Available
This field displays the monies Available for allocation of the Bank Guarantee.

Description
This field allows the User to enter a free form text description for the Bank Guarantee.

Bank
The Name of the Bank can be entered into this field if required.

Branch
The Branch of the Bank can be entered into this field if required.

Bank Reference
The Bank Reference can be entered into this field if required.

Due Date
The Date that the Bank Guarantee is due is entered into this field.

Date Collected

When the Bank Guarantee has been collected then the Date Collected field is updated with this date. This is used in conjunction with the Amount Collected field.

Amount Collected
When the Bank Guarantee has been collec then the Amount that has been collected is entered into this field. This is used in conjunction with the Date Collected field.

Contributor

The Contributor is normally the Builder etc. This is the person or company contributing to the Bank Guarantee.

Discharge Reason
The Discharge Reason field allows upto 200 characters to be entered to describe the reason for the discharge.

Discharge Date
The Discharge Date represents the date the Bank Guarantee was discharged.

Amount
The Amount field displays the amount that was discharged.

Type

The Bank Guarantee Type can be entered into this field for the Bank Guarantee. The Bank Guarantee Types are defined within the Bank guarantee Types Maintenance option within Bank Guarantees. This field can be left blank if not required. The Type field can be used within the Reporting and Searching options to assist with finding particular Types of Bank Guarantees. The Pop Up can be used to display a list of valid Bank Guarantee Types.

Expiry Date
When the Expiry Date field is populated users are no longer able to allocate Applications to this Bank Guarantee record as the Allocate Button is dimmed on the form.

Application
The Application that has the Bank Guarantee associated to it is displayed in this field.

Location
The Location specified on the Application is displayed in this field.

Date
The Date that the Bank Guarantee was allocated to the Application is displayed in this field.

Amount
The Amount represents that amount of the Guarantee that has been allocated to the application.

Detail Button
Selection of the Detail Button will display the actual Application Maintenance Summary form where details of the Application can then be reviewed.

Options – Allocate

The Options – Allocate Button allows selection of another application to be associated with the Bank Guarantee being displayed.

NOTE : - If the Allocate option is selected when this form has been accessed via the Application Maintenance Menu using the Bank Guarantee Allocation Option, then that Application will be automatically Allocated to the displayed Bank Guarantee. The User does not have to search and select the Application again.

Options – Reversal

The Options – Reversal Button allows the reversal of an allocation entry for an application.

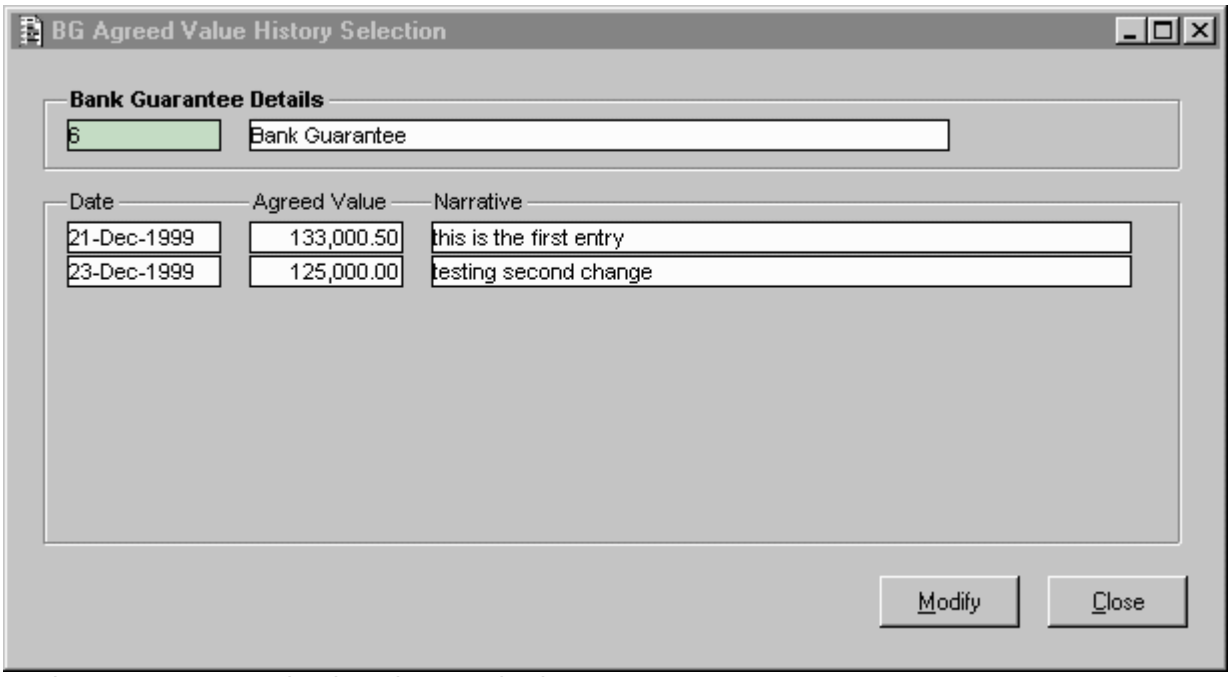
Options – Agreed Value History
The Options – Agreed Value History Button displays a narrative form to allow information to be entered against the Agreed Value that has been entered on the Bank Guarantee Maintenance Form.

Options – Reversal Details

The Options – Reversal Details Button displays the information that was entered into the narrative field for the Reversal Reason when the Reversal Button had been selected.

Bank Guarantee Agreed Value History Selection Form

The Bank Guarantee Agreed Value History Form displays the date that the Agreed Value had been entered into the field. If the Agreed Value is changed on the Bank Guarantee Maintenance form then another entry will be recorded on this form showing the new Agreed Value with the Date that the Agreed Value was changed. The records are then able to be modified to allow entry of information into the Narrative field to further explain or comment on the change.



Bank Guarantee Agreed Value History Selection Form

Bank Guarantee Details
The Bank Guarantee Detail fields display the Bank Guarantee Number and the associated Description that have been entered on the Bank Guarantee Maintenance form. These fields are display only and cannot be maintained on this form.

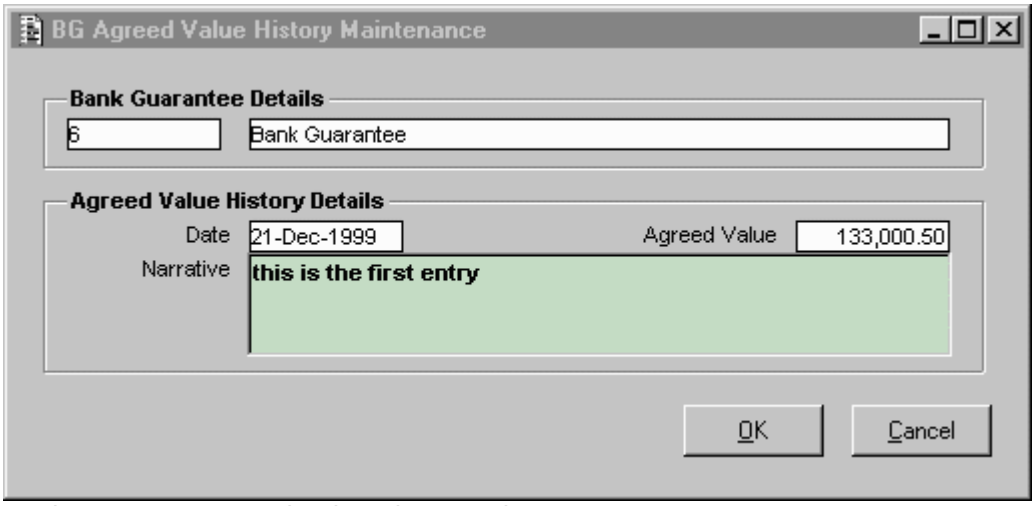
Date
The Date that the Agreed Value was changed or first entered on the Bank Guarantee is displayed in this field.

Agreed Value
The Agreed Value is displayed in this field. This is the value that was entered or adjusted on the Agreed Value field on the Bank Guarantee Maintenance form.

Narrative
The Narrative field displays the information that has been entered into the Narrative field on the Agreed Value History Maintenance form.

Bank Guarantee Agreed Value History Maintenance Form

The Bank Guarantee Agreed Value History Maintenance Form is displayed when the modify button has been selected from the Agreed Value History Selection Form. All fields are display only with the exception of the Narrative field. Further information or comments can be entered into this field to be associated with the actual date and entry of the Agreed Value.



Bank Guarantee Agreed Value History Maintenance Form

Bank Guarantee Details
The Bank Guarantee Details are displayed from the Bank Guarantee Maintenance form and are display only.

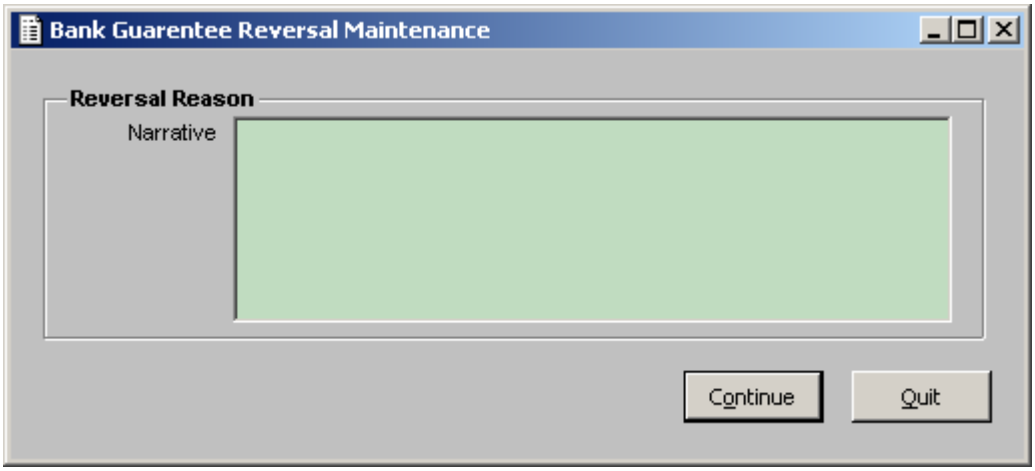
Agreed Value History Details – Date
The Date that the Agreed Value was entered or modified is displayed in this field. This field cannot be maintained.

Agreed Value History Details – Agreed Value
The Agreed Value that was entered is displayed in this field. This field cannot be maintained.

Agreed Value History Details – Narrative
The Narrative field allows for further information or comments to be entered regarding the entry or modification of the Agreed Value.

Bank Guarantee Reversal Maintenance Form

The Bank Guarantee Reversal Maintenance Form is displayed when the reversal button has been selected from the Bank Guarantee Maintenance Form.

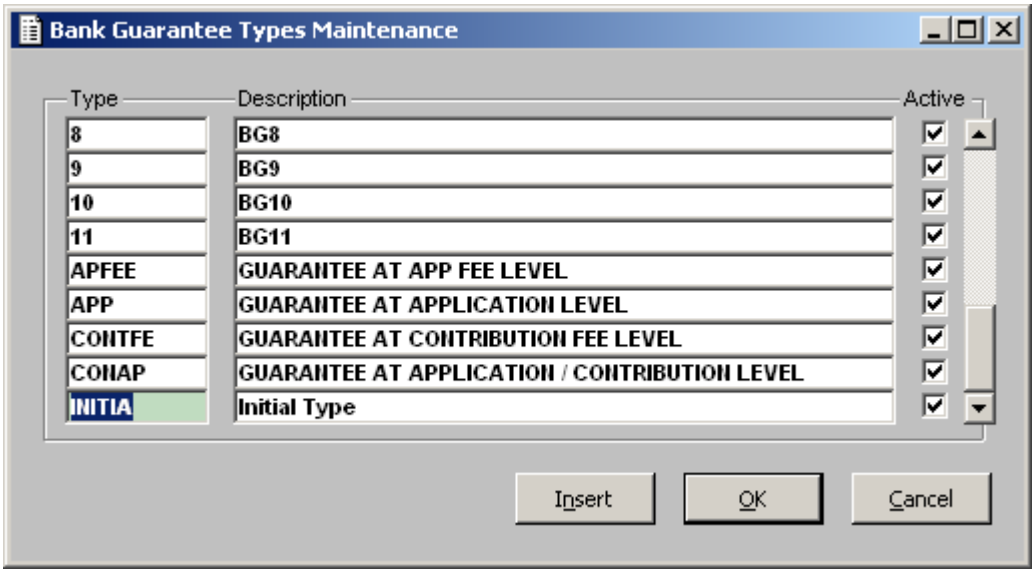


Bank Guarantee Reversal Maintenance Form

Reversal Reason - Narrative
The reason for the reversal of the Bank Guarantee can be entered into this freeform field.

Bank Guarantee Types Maintenance Form

The Bank Guarantee Types Maintenance Form allows the entry and modification of Bank Guarantee Types. These Types can be used when entering information about a Bank Guarantee. The Type field can then be used to assist with selecting and reporting on certain Bank Guarantee Types.



Bank Guarantee Type Maintenance Form

Bank Guarantee Type
The Bank Guarantee Type is displayed in this field.

Bank Guarantee Type Description
The Description of the Bank Guarantee Type is displayed in this field.

Active
The Active flag informs the User as to whether the Type is able to be used or not.

Enquiry

The following topics are covered in this section:

Application Enquiry
Fees Enquiry

Application Enquiry

The Application Enquiry Function is designed to allow access to the Applications System without having the ability to modify any details of an Application.

A Users Responsibility Structure and Options will dictate as to whether Maintenance functions of Applications are available, or Enquiry Alone.

If the Users Responsibility Structure dictates that they may enquire only on Applications, then the Menu will only show the Application Enquiry Button.

The Enquiry Function will allow the User to move through each of the Applications Screens and view information regarding a particular aspect of the Application, but will not allow them to make any specific changes to the application.

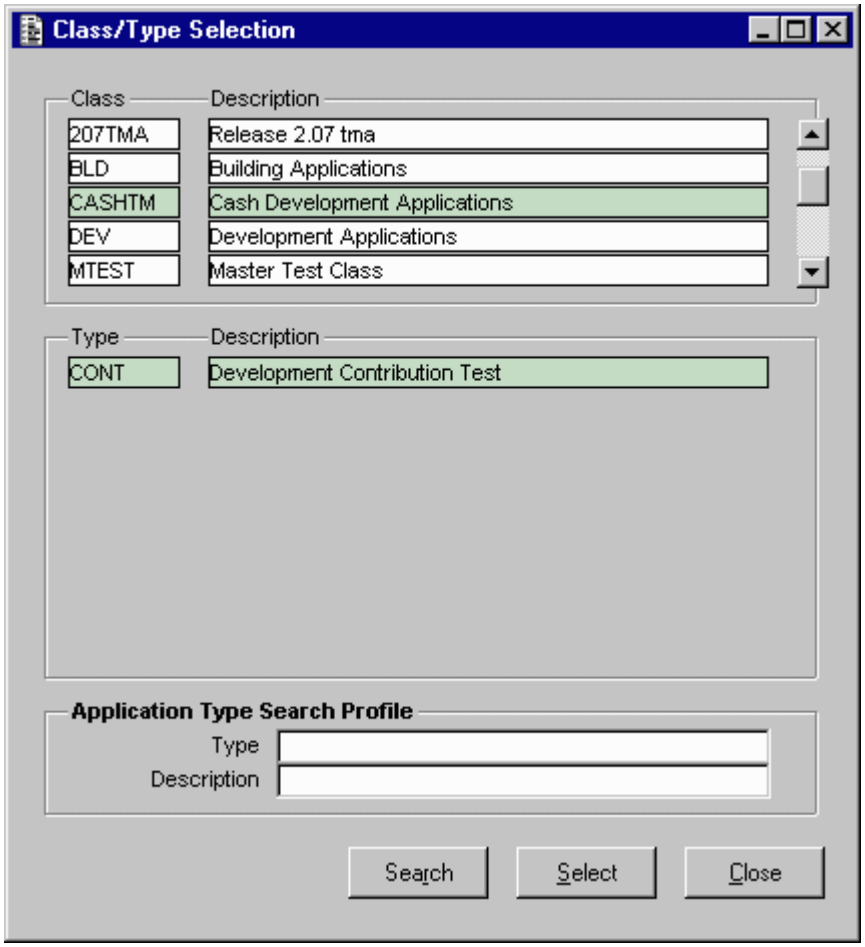
The Forms that the Users enter will look exactly the same as the Maintenance Forms, only the Buttons will differ. There will be no input capability to these forms.

For Example:

- Modify buttons will be replaced with Display Buttons
- OK and Cancel Buttons will be replaced with a Close Button.

Fees Enquiry

Class/Type Selection Form



Class/Type Selection Form

Class

These fields display the classes together with their descriptions, which are available for selection.

Type

These fields display the available Application Types together with their descriptions.

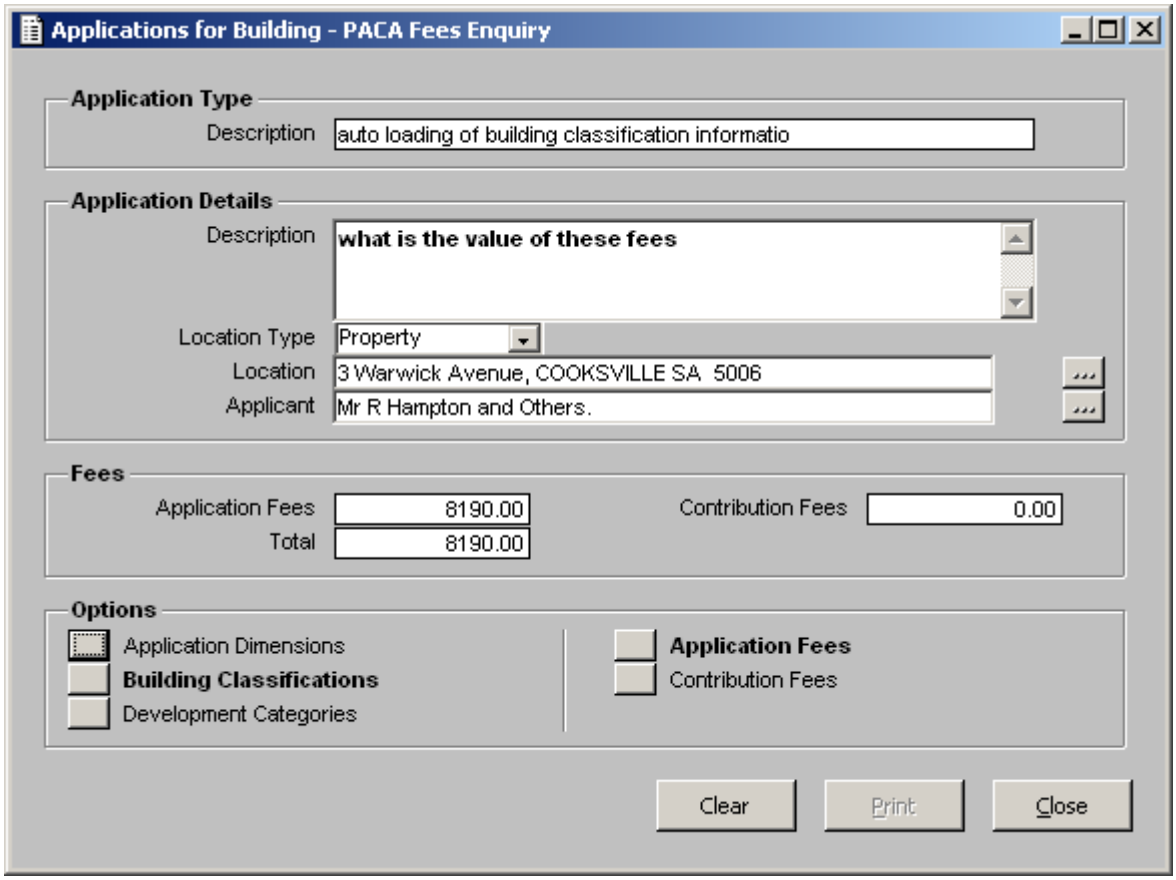
Application Type Search Profile - Type

This field allows entry of an Application Type on which to base your search. This may be useful when there are more than 9 Application Types to select from.

Application Type Search Profile - Description

This field allows entry of an Application Type Description on which to base your search. This may be useful when there are more than 9 Application Types to select from.

Fees Enquiry Form



Fees Enquiry Form

Application Details - Class
The Class Field is used to describe the particular Class of Application Selected.

Application Details - Type
The Application Type is used to select the particular Application Type required for this Fee Enquiry

Application Details - Description
This field details the Description of the Application chosen.

Application Details - Location Type
This field may be used to select the particular Location Type. A drop down button is available to select from Property, Street or Parcel type Locations.

Application Details - Location

The Location Field allows for the entry of the particular Location required to calculate a Fee Enquiry on. The Location Pop Up Button may be selected to detail out to the Location Selection Form.

Application Details - Applicant

The Location Field allows for the entry of the particular Location required to calculate a Fee Enquiry on. The Location Pop Up Button may be selected to detail out to the Location Selection Form.

Dimension

This field may have information detailed in it, depending on the particular Application Type selected. These Dimensions may be highlighted to be included in the Calculation of the Fee Enquiry. The Pop Up Button may be selected to select a predefined Dimension.

Value
This field allows the User to add a Dollar Value for the Fee Enquiry.

Fees - Application Fee
An Application Fee may already appear in this field if there are fees associated with the chosen Application Type. These fees may be altered prior to calculation.

The Detail Button may be selected to take the User to the Application Fee Maintenance Form.

Fees - Contribution Plan

A Contribution Plan Fee may already appear in this field if there are Contribution Fees associated with the chosen Application Type. This field may be altered or added to prior to calculation. The Detail Button may be selected to Detail to the Contribution Plan Maintenance Form.

Fees - Total

This field will have the Total of the Application Fee and Contribution Fees.

Options – Load Fees

Upon first entering the Fees Enquiry Menu the only Option displayed is the Load Fees. Selecting this Option will load the fees assigned to the Application Type selected using detail from the Property selected. Once this Option has been selected then it is replaced with the Options available within the fees. These Options are:-

- Application Dimensions
- Buildinging Classifications
- Development Categories
- Application Fees
- Contribution Fees

NOTE:- Selecting the Clear Button will reset the form back to how it was upon entry and the Options will revert to Load Fees.

Print Button

The Print Button may be selected if a copy of the Calculation is required. This Option will not be available if the Merge Type to be used for the Print has not been defined for the Fee Enquiry Print against the Application Type within the Parameters

Prepayments

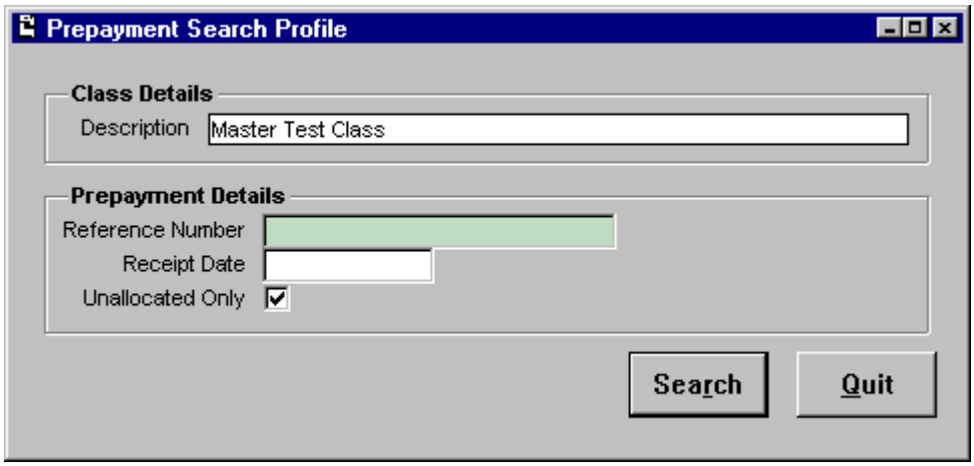
The following topics are covered in this section:

Prepayment Enquiry
Prepayment Maintenance

Prepayment Enquiry

Prepayment Search Profile Form

The Prepayment Filter Form allows the User to Search for any Prepayments that may have been made against an Application.



Prepayment Search Profile Form

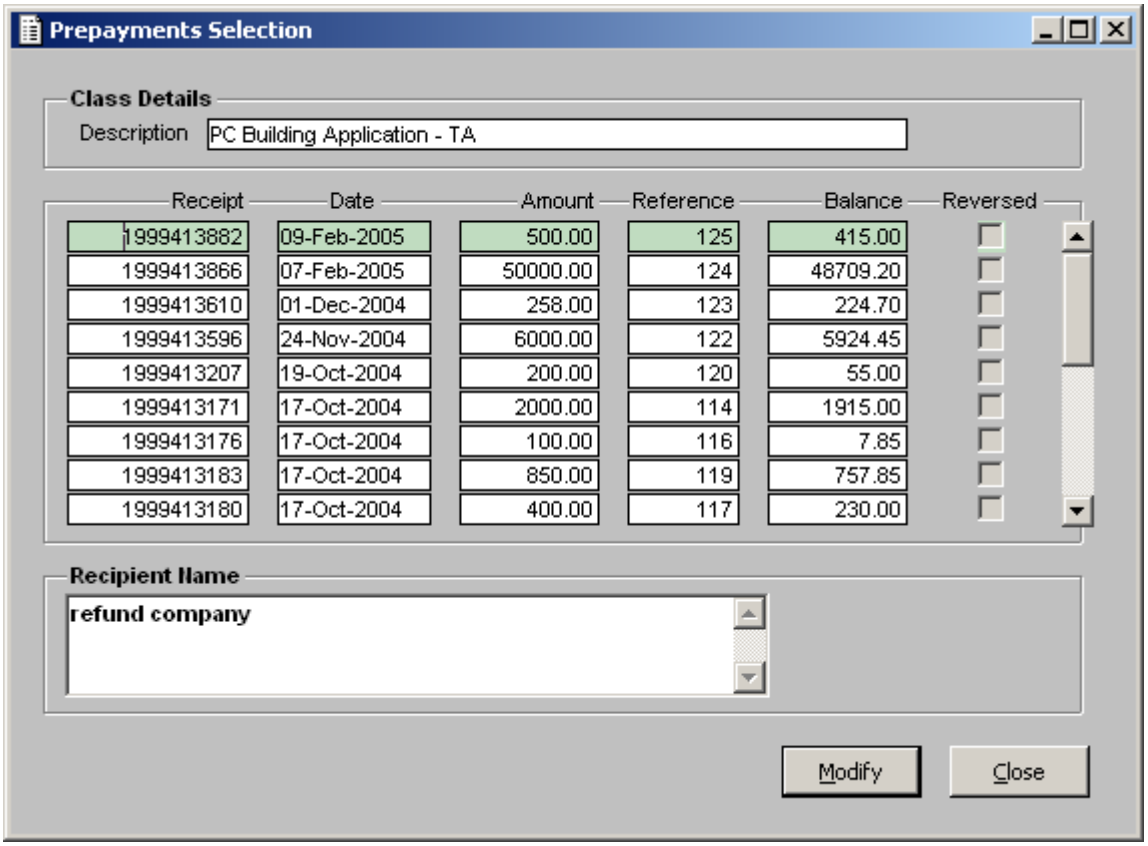
Class Details - Description
This field details the name of the Current Class.

Prepayment 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 allows the User to enter a date that the Prepayment may have been made. Double clicking in this field with the Mouse will allow the User to select from the Calendar.

Prepayment Details - Unallocated Only
If this field is checked, then Prepayments will only be selected if they are unallocated. If the field is unchecked then both Allocated and Unallocated will be searched on.

Prepayments Selection Form



Prepayments Selection Form

Class Details - Description
This field details the current Class and Description of the Application.

Prepayment Date
This field details the date that the Prepayment 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 Prepayment.

Amount
This field details the actual dollar value of the Prepayment.

Balance
This field details the dollar value left against the Application after the Prepayment has been added.

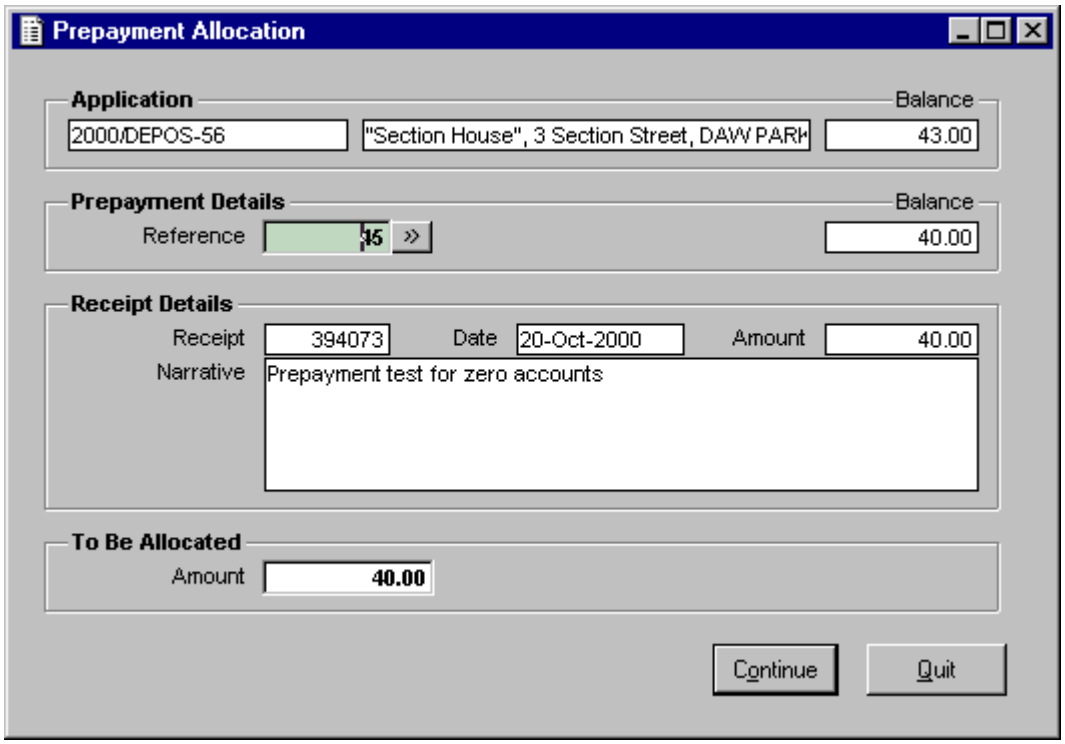
Reversed
This field if checked on will show that this particular Prepayment has been reversed.
Clicking the Display Button will detail the User to the Prepayments Maintenance Form

Recipient Name
The Receipient Name on the Receipt in focus is displayed in this field. As focus is moved from one Receipt to the next so the information in this field changes to reflect the Name of the Receipt.

Prepayment Maintenance

Prepayment Allocation Form

The Prepayment Allocation Form allows the User to enter a Receipt/Reference number or detail out to the Prepayment details form.



Prepayment Allocation Form

Application
This field details the actual Application currently being accessed.

Balance
This field details the balance of the Fee for Allocation.

Pre-Payments Details - Receipt/Reference Number/Balance
This field allows the User to enter a Receipt or Reference Number to search on.

Receipt
This field displays the Receipt Number. This field cannot be maintained

Date
This field displays the Date of the Prepayment Receipt. This field cannot be maintained

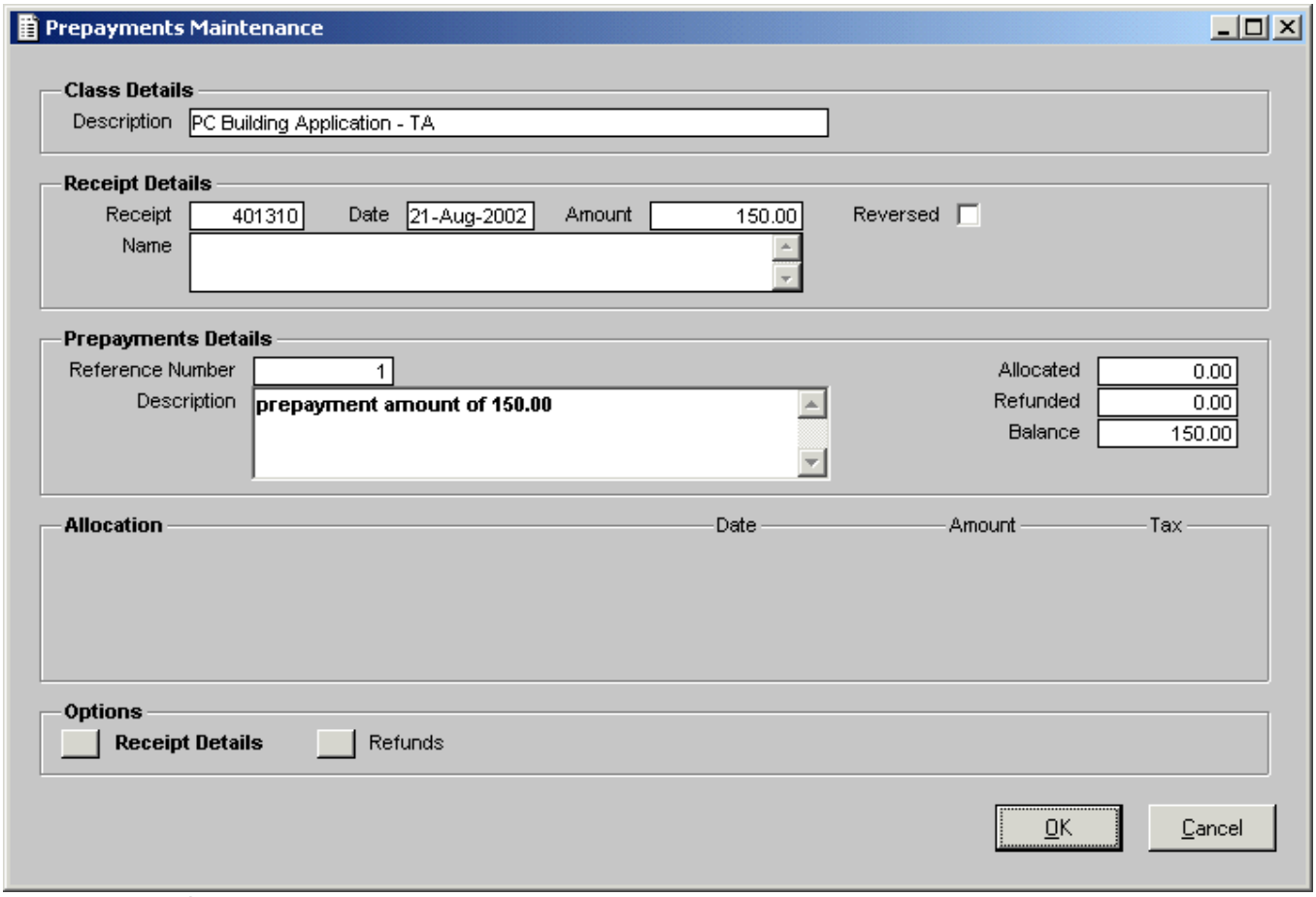
Amount
This field displays the amount of the Prepayment available for allocation

Narrative
This field displays additional comments from the Prepayment Receipt. This field cannot be maintained

To be Allocated - Amount
Enter the Amount required for the allocation.

Prepayments Maintenance Form

The Prepayments Maintenance form allows the User to view and allocate/reverse Prepayments.



Payments Enquiry Form

Class Details - Description
This field details the current Class and Description of the Application.

Receipt Details - Receipt
This field details the actual Receipt Number entered.

Receipt Details - Date
This field details the date that the Prepayment was made.

Receipt Details - Amount
This field details the 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.

Prepayment Details – Reference Number
The Reference Number is the number that is automatically allocated to the Prepayment at the time of Receipting.

Prepayment Details - Description
The Description that was entered at Receipting is displayed in this field.

Prepayment Details - Allocated
The Alocated field displays the accumulated amount of the Prepayment that has been allocated to Fees.

Prepayment 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 Applications that have had allocations made against them from this Prepayment will be displayed in the Allocation Details section. This shows the Application Number and Location that the Application is for.

Allocation Details - Date
The Date field represents the Date that the allocation occurred against the Application.

Allocation Details - Amount
The Amount field represents the amount that was allocated to the Application from the Prepayment Receipt.

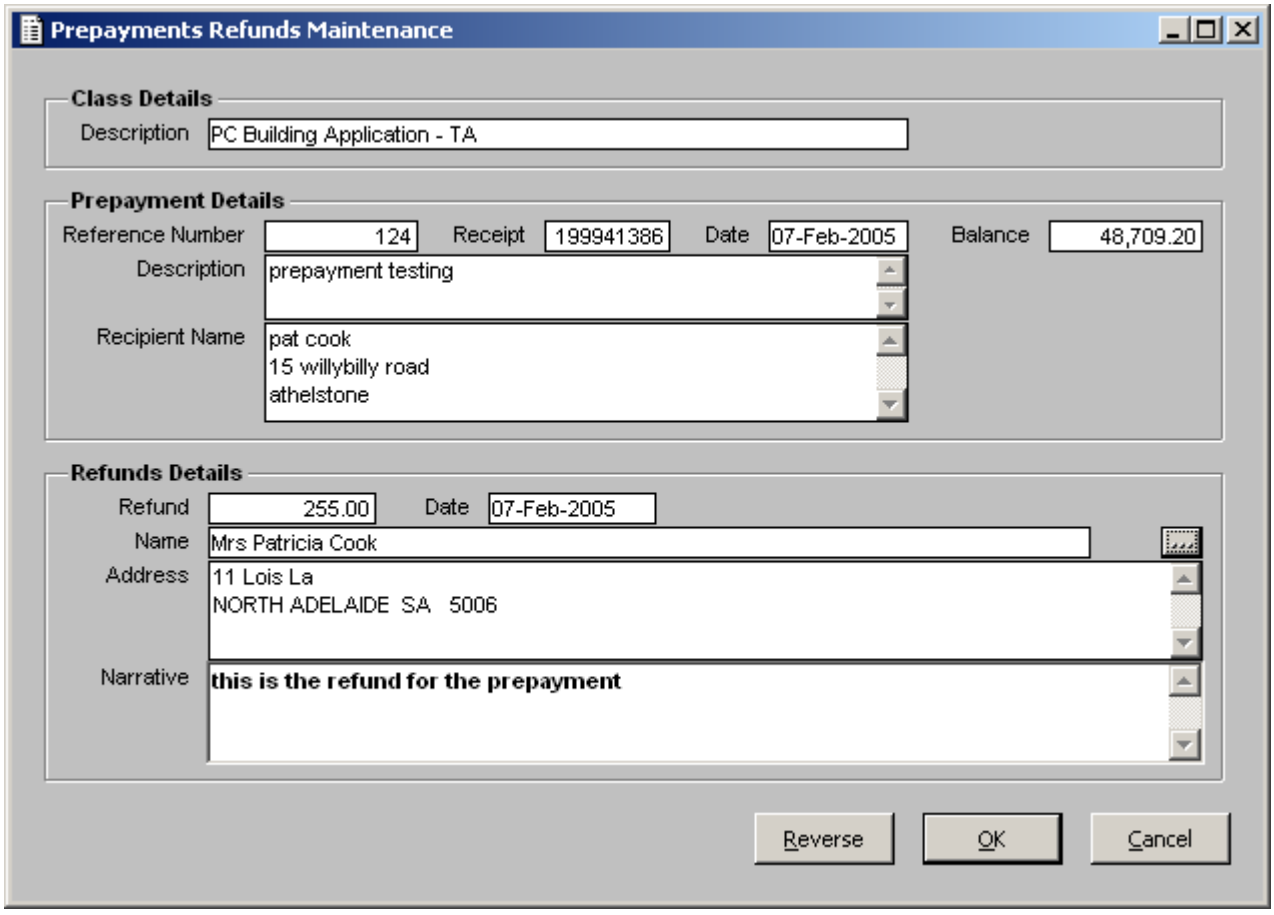
Allocation Details – Detail Button
Selecting the Allocation Details Button will take the User to the Summary Form for the Application that has been allocated the Prepayment.

Options – Receipt Details
Selection of the Options Receipt Details Button will display the 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.

Prepayments Refunds Maintenance Form

The Prepayments Refunds Maintenance form allows the User to add a Refund against the Prepayment or view the details of a Refund that has already been made against the Prepayment.



Prepayments Refunds Maintenance Form

Class Details - Description
This field details the current Class and Description of the Application.

Prepayment Details – Reference Number
The Reference Number displayed is the Prepayment Reference Number that was allocated to the Prepayment when the Prepayment was entered into the Receipt Entry Module.

Prepayments Details - Receipt
The Receipt field displays the Receipt Number that the Prepayment was entered on.

Prepayments Details - Date
This Date field displays the date that the Prepayment was made via the Receipting Module.

Prepayment Details - Balance
The Balance field displays the amount that is remaining on the Prepayment. Therefore if any part of the Prepayment has already been allocated to an Application then this value will reflect this. For example if the receipted Prepayment Amount was $100.00 and since receipting the amount $70.00 had been allocated to an Application then the amount that would display in this field would be $30.00.

Prepayment Details - Description
The Narrative that was entered against the Prepayment during Receipting is displayed in this field.

Prepayment Details – Recipient Name
The Recipient Name that appeared on the Receipt when the Prepayment was entered via the Receipting Module is displayed in this field.

Refunds Details - Refund
The Refund field is where the amount to be refunded is entered. This amount cannot be greater than the Balance Amount shown in the Prepayment Details Balance field.

Refunds Details - Date
The Date that the Refund occurred is displayed in this field. Upon entering into this form to create a Refund the Date is defaulted to todays date.

Refunds Details - Reversal
If the Refund has been reversed then the Reversal field is displayed on the form. This shows the date of the Reversal and if further detail is required the Detail Button can be used to display this information.

Once the Refund has been reversed then the Reversal Button on the bottom of the form is not available for selection.

Refunds Details - Name

The Name of the Person or Company to receive the Refund is displayed or entered into this field. The Detail Button can be used to search for the appropriate Name information.

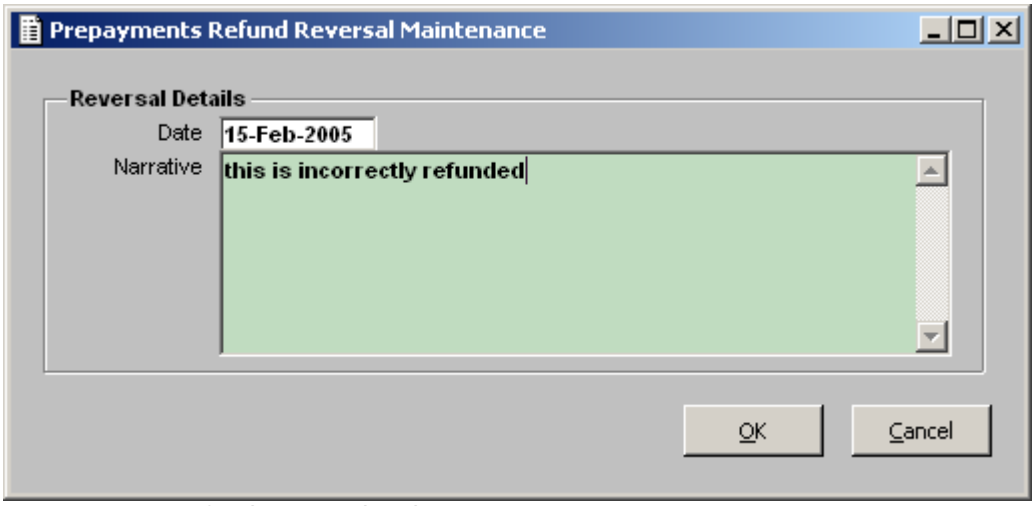
Note that a Name must be entered when processing a Refund on a Prepayment.

Refunds Details - Address
Once the Name has been selected or entered then the address for the name will appear in this field.

Refunds Details - Narrative
The Narrative field allows free form entry into this field. This field can be used to enter additional information relating to the Refund.

Prepayments Refund Reversal Maintenance Form

The Prepayments Refund Reversal Maintenance form allows the User to add information against the Prepayment Refund being reversed or view the details of a Refund Reversal that has already been made against the Prepayment.



Prepayments Refund Reversal Maintenance Form

Reversal Details - Date

The Date that the Refund was reversed is displayed or entered in this field.

Reversal Details - Narrative

The detail or reason for the Reversal can be entered into the Narrative field.

Reporting & Batch Functions

The following sections provide details on the Application information that can be provided in hard copy format or output to file. These include a variety of reports that can be used by Management, by Officers for different information and for the public to view.

The following topics are covered in this section:

ABS Report
Approval Times Report
BCC Report
Bulk Fees Transfer
Bulk Invoices Print
DOI Report
DPIWE Extract
Fees Report
Print Application Letters
Print Permits and Certificates
Rebuild Lookup Table
Register Report
Non-Cash Control
Bank Guarantee Control
Contributor Report
Lapsed/Expired Report
Lapsed/Expired Update
Task Report
Update Next Number and Year
Lost Numbers Report
Prepayment Report
PlanFirst Levy Extract & Report
Long Service Levy Extract & Report
Days Outstanding Report
Owner Names Update Report
Application GIS Filter
Rebuild General Enquiry Look-Up Table

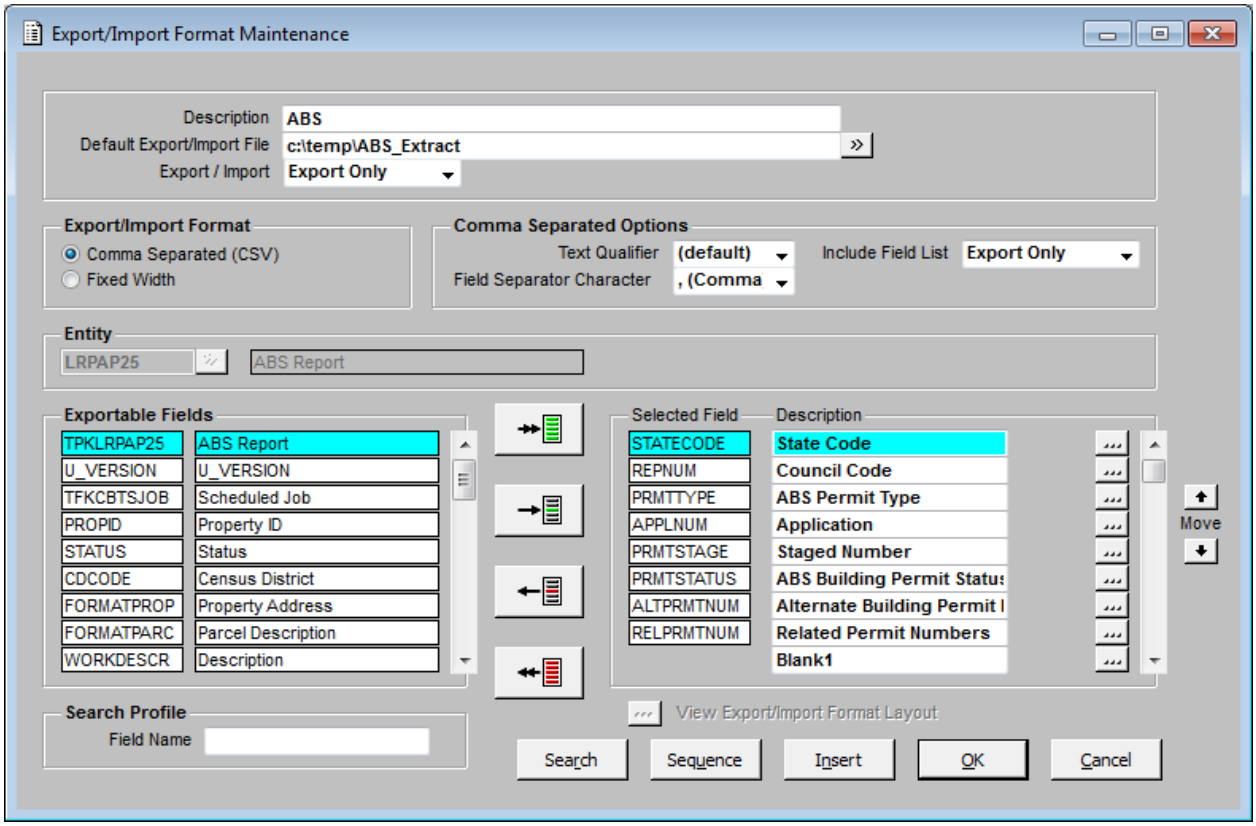
ABS Report

ABS Report Upgrade

The ABS report has been designed to make it more adaptable to any changes implemented by the ABS in the future. If the length of any of the fields, the format of any fields or constant fields are changed, then the modifications can be reflected in the extract file without having to re-code any forms. The changes can be made on-line and on site by the customer.

The ABS extract file format needs to be set up before the ABS report can be run. To do this, start a run time session. From the Menu go to Query, Query Parameters, and Export/Import Format Maintenance to get the Export/Import Format Search Profile. Enter “LRPAP25” into the Entity field and press search. If no occurrences match the search profile, then press NEW.

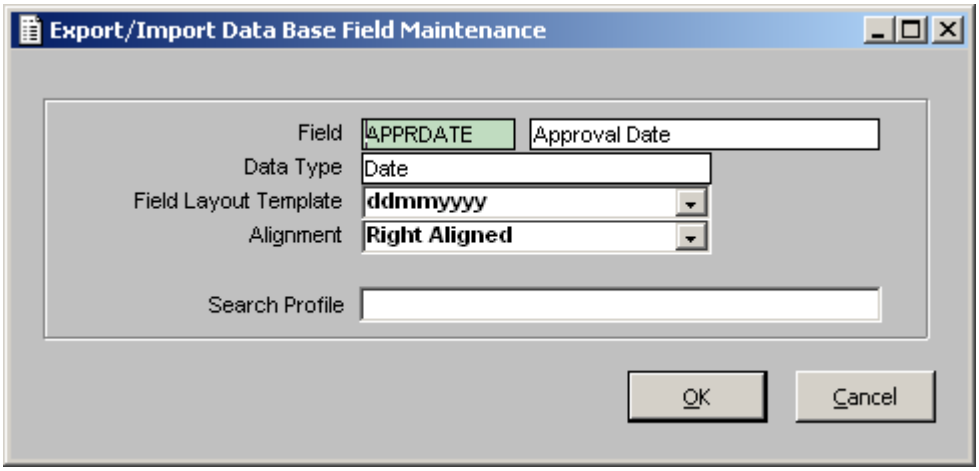
On the Export/Import Format Maintenance form, enter the description and the path for the extract file. Set the field Export / Import to Export Only, set the Export/Import Format to Fixed Width and set the field Entity to LRPAP25 (see figure 1.1).



Export/Import Format Maintenance form.

From the Exportable Fields section, select the required fields using the select button.

For fields where the format of the extract file may be different to the format of the LRPAP25 field i.e. Item # 5 Approval_date, then use the detail button for that field (see figure 1.1) to get to the Export/Import Field Maintenance form (see figure 1.2).



Export/Import Field Maintenance form.

For the example of Approval_date, the format of the LRPAP25 field is yyyymmdd. The ABS requires the format to be ddmmyyyy. To change this, select the required format from the Field Layout Template dropdown (see figure 1.2) then press OK.

Ensure that all the required fields have been selected and added where required and all the lengths of the fields have been set to that specified in table A. Once this has been completed the ABS report can be run.

Print ABS Control Form

The ABS Report allows the User to produce a report based on specific parameters entered. A Report may be created, and/or a file can be generated to send to the Australian Bureau of Statistics.

All that is required for an application to be included in the ABS Report is that it must have an approval decision that falls within the date range that is selected on the control form. Any Mandatory ABS fields not filled in at the application level will be displayed as an exception.

Mandatory fields required for the ABS Report are:

Where a Mandatory field such as Materials – Walls, Frame, Roof or Floor do not apply to that particular Application Type, the ABS have stated that they are agreeable to Users entering the “90 – Not Applicable” code. If you do not add these you will continue to get Exceptions.

When an Application is successfully extracted to the ABS BC the following will occur;

- The Application Data Maintenance Form will have the ABS/BCC Extract Date populated.
- An entry will be placed in the LRPAP25 table.
- An entry will be included in the “.txt” file that is to be forwarded to the Australian Bureau of Statistics.
- An entry of the Application will be printed on the ABS extract Report.
- There will be no entry of the Application on the Exceptions Report.

Executing the ABS Report in Report Mode ONLY;

- The correct Applications will be reported in the Extract report.
- The incorrect Applications will be reported in the Exceptions report.
- The LRPAP25 entity will ONLY be updated with the correct Applications.
- The”.txt” file is not created as the User is in Report Mode only.
- The ABS Extract date field on the Building Data Form will not be populated as the User is in Report Mode only.

Executing the ABS Report in Update and Report Mode as Replace Option (without correcting Applications with Exceptions);

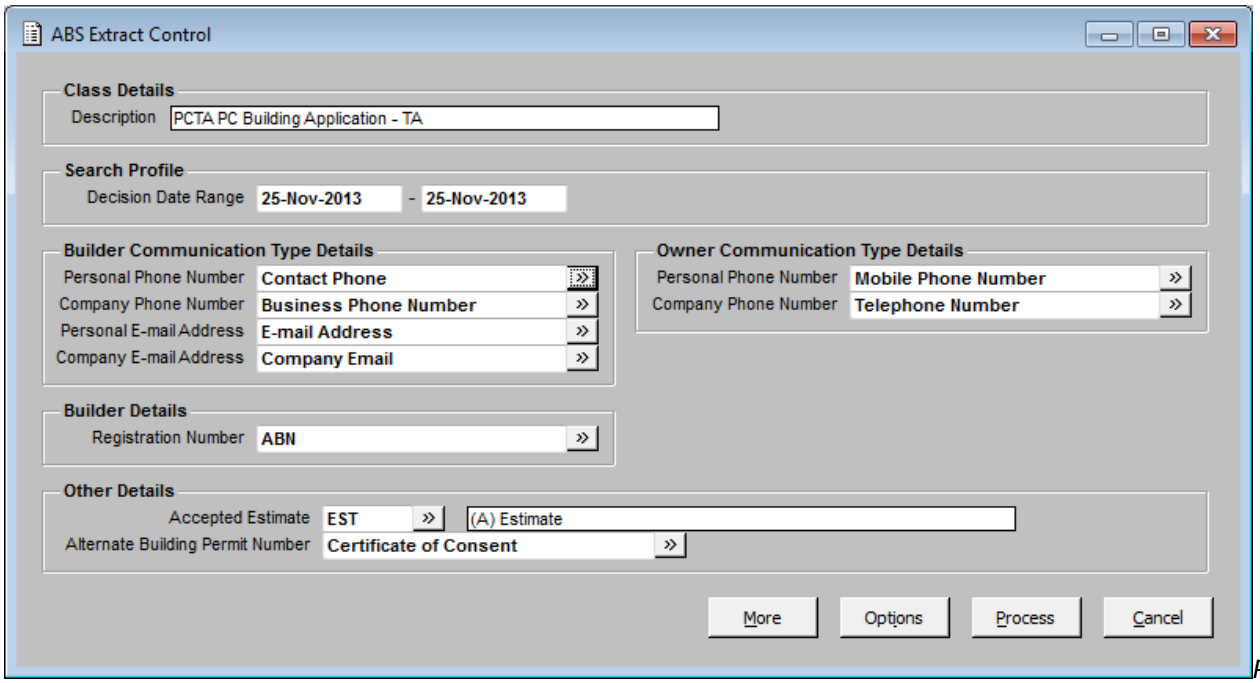
- The correct Applications will be reported in the Extract report.
- The incorrect Applications will be reported in the Exceptions report.

- The LRPAP25 entity will ONLY update with the correct Applications.
- The".txt" file will only include the "correct" Applications.
- The ABS Extract date field on the Building Data Form will be populated for the correct Applications.

Executing the ABS Report in Update and Report Mode as Append to File (with corrected Applications

- The correct Applications ONLY will be reported in the Extract report. (will not report on those already extracted).
- There should be no entries on the Exception report.
- The LRPAP25 entity will be updated with the corrected Applications.
- The ".txt" file will contain all Applications that meet the required date range and contain the required data.
- The ABS Extract date field on the Building Data Form will be populated for all Extracted Applications that meet the required date range and contain the required data.

Once all details required are entered in the Appropriate fields of the ABS Control Form, 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.



Print ABS Control Form

Class Details

This field displays the Class Details description in full.

Search Profile - Decision Date Range

This date field allows for the entry of a "To" and "From" Decision Date range to be included in the Report.

Builder Communication Type Details – Personal Phone Number

This field allows for the entry of a Builders Personal Telephone Number. The Number can be selected from a predefined range of Communication Types, by clicking on the Pop Up Button
The Pop Up Form will be displayed once the Pop Up Button is selected. This form has a selection of Communication Types that have been created through the Name and Address Module.

Builder Communication Type Details – Company Phone Number

This field allows for the entry of a Builders Company Telephone Number. The Number can be selected from a predefined range of Communication Types, by clicking on the Pop Up Button.
The Pop Up Form will be displayed once the Pop Up Button is selected. This form has a selection of Communication Types that have been created through the Name and Address Module.

Builder Communication Type Details – Personal E-mail Address

This field allows for the entry of a Builders Personal E-mail Address. The E-mail Address can be selected from a predefined range of Communication Types, by clicking on the Pop Up Button
The Pop Up Form will be displayed once the Pop Up Button is selected. This form has a selection of Communication Types that have been created through the Name and Address Module.

Builder Communication Type Details – Company E-Mail Address

This field allows for the entry of a Builders Company E-mail Address. The E-mail Address can be selected from a predefined range of Communication Types, by clicking on the Pop Up Button.
The Pop Up Form will be displayed once the Pop Up Button is selected. This form has a selection of Communication Types that have been created through the Name and Address Module.

Owner Communication Type Details - Personal

This field allows for the entry of an Owners Personal Telephone Number. The Number can be selected from a predefined range of Communication Types, by clicking on the Pop Up Button.
The Pop Up Form will be displayed once the Pop Up Button is selected. This form has a selection of Communication Types that have been created through the Name and Address Module.

Owner Communication Type Details - Company

This field allows for the entry of an Owners Company Telephone Number. The Number can be selected from a predefined range of Communication Types, by clicking on the Pop Up Button.
The Pop Up Form will be displayed once the Pop Up Button is selected. This form has a selection of Communication Types that have been created through the Name and Address Module.

Builder Details - Registration Number

This field allows for the entry of a Builders Registration Number. The Number can be selected from a predefined range of Information Types, by clicking on the Pop Up Button.

Other Details – Accepted Estimate

This field is used to enter an Accepted Estimate Type. Enter the Code required, or select the Pop Up Button. The Dimension Pop Up Form will be presented.
This form as detailed previously, shows a list of predefined Dimensions for selection. The Form details the Dimension Codes and Descriptions for easy selection.
A Search Profile is also available for narrowing the Search if there is more than one screen full of dimensions.

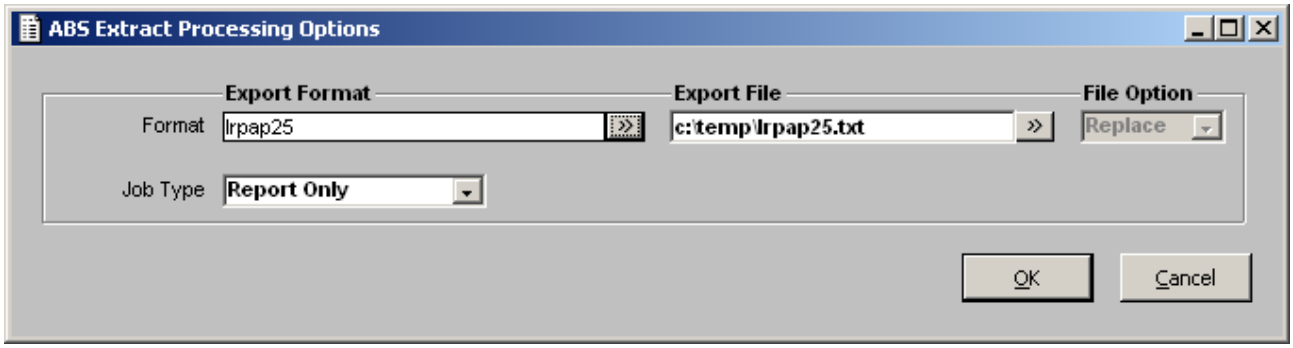
Other Details – Alternate Building Permit Number

This field is used to enter an Alternate Building Permit Number. Enter the description required, or select the Pop Up Button.
The Miscellaneous Data Pop Up Form will be presented.
A Search Profile is also available for narrowing the Search if there is more than one screen full of dimensions.

More Button

Selecting this button will display the Print ABS Processing Options form.

Print ABS Processing Options Form



Print ABS Processing Options Form

Processing and Export Options - Format

This field allows for the entry of an Export Format. The Format can be selected from a predefined range of Export Formats, by clicking on the Pop Up Button.
The Pop Up Form will be displayed once the Pop Up Button is selected. This form has a selection of Export Formats that have been created through the Query Module.

Processing and Export Options - Job Type

This field allows for the entry of the Job Type. This can be selected using the drop down list.
The options for selection are;

- Report only
- Report and Update

Processing and Export Options - File

This field allows for the entry of the Export File Path.

Processing and Export Options - File Option

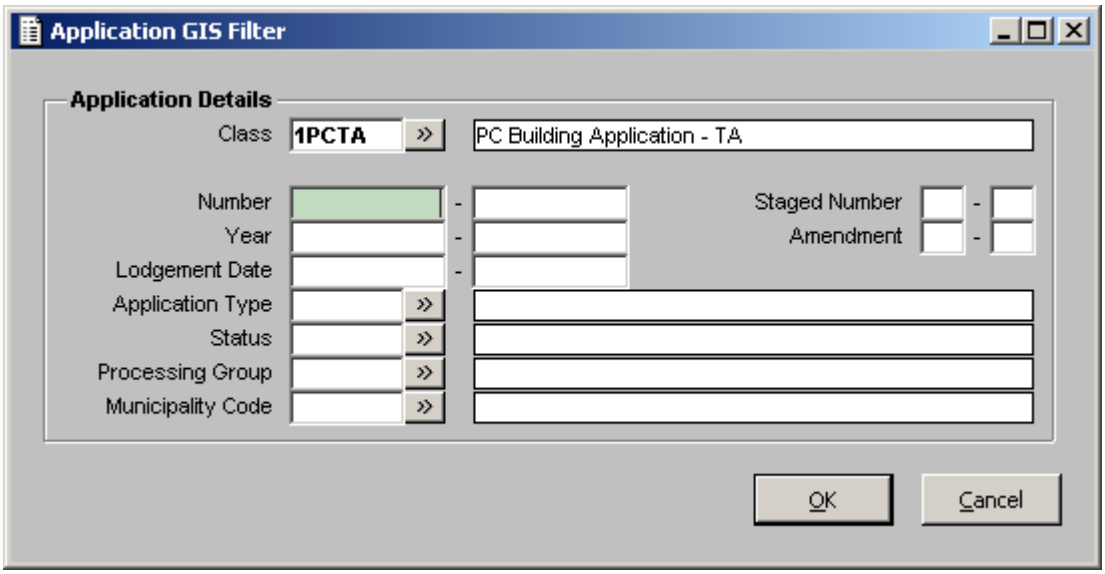
This field allows for the entry of the File Option. This can be selected using the drop down list.
The options for selection are;

- Append
- Replace

Application GIS Filter

Aplication GIS Filter Form

The Application GIS Filter form is displayed when properties have been selected from a GIS product and then requested to display any Applications that are associated to the selected properties.



Application GIF Filter Form

Application Details – Class

The Application Class that is required to be search over is displayed in this field. This is defaulted to the first Application Class that the User has authority to. This can be changed to another Application Class if required.

Application Details - Number

The Number range fields can be used to enter the range of Numbers that are required to be search over for the relevant selected properties from GIS. 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. If a range of Numbers is required then enter in the required range.

Application Details – Staged Number

If a particular Stage Number or range is required also, then the Staged Number can be entered into this field.

Application Details – Year

If Application from a particular Year or range of Years is required, then the Year(s) can be entered into these fields.

Application Details – Amendment

If a particular Amendment or range of Amendments are required, then the Amendment Code can be entered into this field.

Application Details – Lodgement Date

If Application from a particular Lodgement Date or range of Lodgement Dates is required, then the Lodgement Date or range can be entered into this field.

Application Details – Application Type

If Applications for a particular Type are required then the Type code can be entered into this field. If the Code is not known then the Pop Up can be used to display a list of Types available.

Application Details – Status

If Applications for a particular Status are required then the Status code can be entered into this field. If the Code is not known then the Pop Up can be used to display a list of Status that are available.

Application Details – Processing Group

If Applications with a particular Processing Group are required then the Processing Group code can be entered into this field. If the Code is not known then the Pop Up can be used to display a list of Processing Groups available.

Application Details – Municipality Code

If Applications with a particular Municipality Code are required then the Municipality Code can be entered into this field. If the Code is not known then the Pop Up can be used to display a list of Municipality Codes available.

Application Services Extract

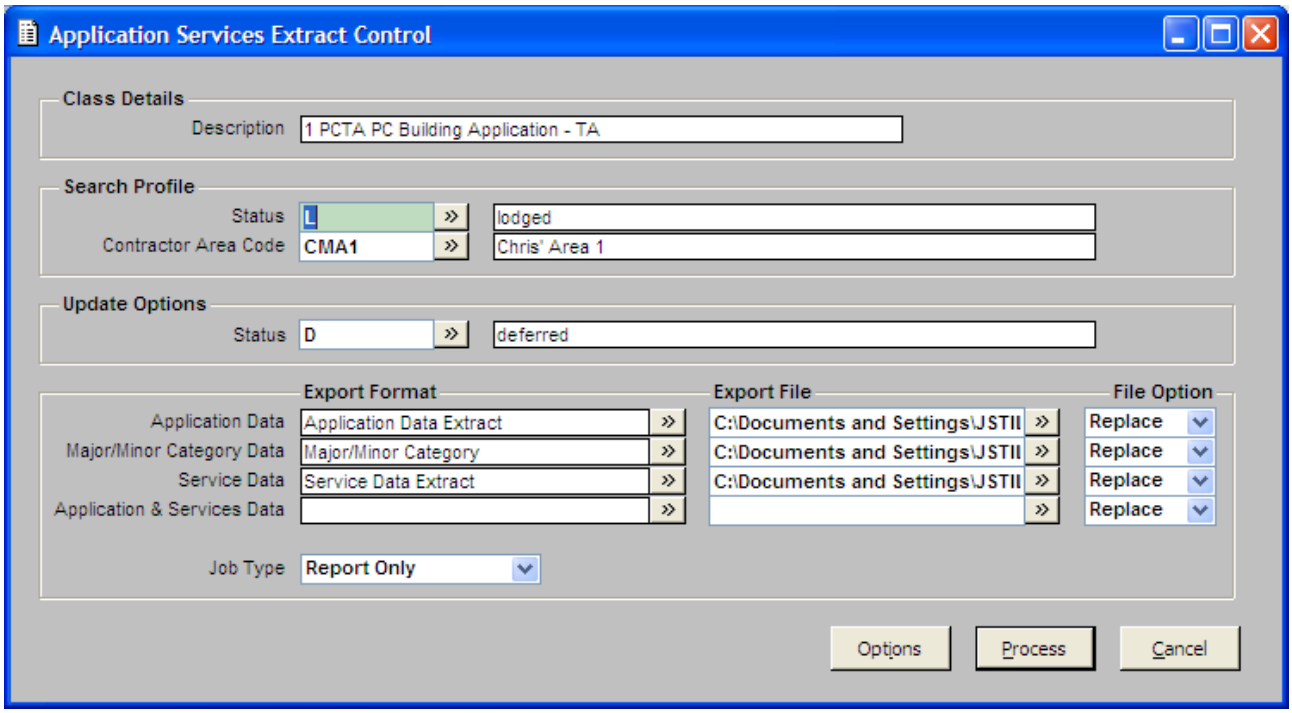
This form allows for the extraction of Services that have been requested for a Property/Application.

The Application Services Extract Process has been modified to include a new "Application and Services Extract" Option which can be used to extract details of Applications and their Services and export to a CSV file. Details and structure of this CSV should be established by using the Query function for the Entity LRPAP83.

The Application Services Extract Process requires a Query to be set up in the Query Function. New Query Format for the Entity LRPAP83 can be created by accessing the Query Menu >> Export/Import Format Maintenance. This format then can be used in the Application Services Extract Control to extract relevant data to a "CSV" file as required.

Additional Field with blank value can be entered by Insert a field with Field Type of "Calculate Value"; Data Type of "String" and Calculation Expression of "$expression("")".

Access to this menu is controlled by the new security of 'Services Extract' which has been included in the Class and Group Batch Functions using Menu Production >> Applications >> Application Classes.



Application Services Extract Control Form

Application Services Control Form

Class Details

This field details the name of the Class currently selected.

Search Profile - Status

The status field allows for the selection of a specific status to be included in the Extract. This file may be left blank which will mean all Services for any status that has not been included in a previous extract will be extracted.

Search Profile – Contractor Area Code

The Contractor Area Code allows for the selection of a specific Area Code to be included in the Extract. This field may be left blank – in which case all Services in any Contractor Area that have not previously been extracted will be extracted. If a specific Contractor Area Code is to be extracted, the Miscellaneous Data field on the Application must have a match with the selected Contractor Area Code nominated here. The Miscellaneous Data Type to have the matching Contractor Area Code entered is nominted on the Application Parameter >> System Parameter Maintenance >> Misc Data Type.

Update Options – Status
The records that match the extracted status and extracted Contract Area Code will be updated to the status code selected here. This field may be left blank, if it is then the original status will not be updated.

Export Format – Application Data
This is the name of the Export Format that will contain Application Data Information. Included in the available fields to be exported are :

Selected Field	Description
TFKCBTSJOB	Scheduled Job
CLASTYPE	Class Code
CLASDESC	Class Description
TYPETYPE	Type Code
TYPEDESC	Type Description
APPNNUMB	Application Number
APPNYEAR	Application Year
FMTNUM	Number
BLDTLBL	Description
BLDTABS	ABS Type
PGRPTYPE	Processing Group
PGRPDESCR	Processing Group Description
STSTTYPE	Status Code
STATDESCR	Status Description
WORKDESCR	Description
WORKLBL	Description
WORKABS	ABS
LODGEDATE	Lodgement Date
APPLNDATE	Application Date
STARTDATE	Start Date
ENDORDATE	Endorsement Date
COMMNDATE	Work Commenced Date
COMPLDATE	Work Completed Date
FINISHDATE	File Finished
EXPIREDATE	Expiry Date
LOCNTYPE	Location Type
LOCNREP	Description
SITE	Description
TOTFEECALC	Total Calculated
TOTFEEEXCP	Total Excepted
TOTFEEPAID	Total Paid
TOTFEERFND	Total Refunded
ATYPTYPE	Authority Code
ATYPDESCR	Authority Description
DTYPTYPE	Decision Code
DTYPEDESCR	Decision Description
REJRTYPE	Rejection Reason
REJRDESC	Rejection Reason Desctiption
DECNDATE	Decision Date
DECNNUMBER	Number
APPEAL	Under Appeal
DECNYEAR	Year
APPREJ	Approval/ Rejection
FMTADDR	Address
STRHOUSNUM	Start House Number

LPSTREET	Street Name
LPSUBURB	Suburb
LPWARD	Ward
LPWARDNUMB	Ward Number
LPSTATE	State
POSTCODE	Postcode
APPLICANTS	Applicant
APPLICADDR	Applicant's Address
OWNERS	Owner
OWNERADDR	Owner's Address
SHORTDESCR	Description
NARRATIVE	Description
ISSUEDATE	Issue Date
MUNCTYPE	Municipality
MUNCDESCR	Municipality Description
COMBYDATE	To Be Commenced By
CMPBTDATE	To Be Completed By
ABSMUNC	ABS Code
COMMENT	Comment
APPLROFFT	User Identifier
APPLROFFD	Primary Officer
DEBTORID	Debtor ID
INVMODNUM	Invoice Number
TOTALFLOOR	Total Floor Area

Export File

This is the file path where the extracted information will be stored..

File Option

This allows the generated data to appended to data that has previously been generated or to replace that dat with the newly generated information.

Export Format – Major/Minor Category Data

This is the name of the Export Format that will contain Major/Minor Category Data. Included in the available fields to be exported are :

Selected Field	Description
TFKLRPAP01	Application Base Data
MAJTTYPE	Type
MAJTDESCR	Description
TFKCBTSJOB	Scheduled Job

Export Format – Service Data

This is the name of the Export Format that will contain Service Data. Included in the available fields to be exported are :

Selected Field	Description
TFKCBTSJOB	Scheduled Job
TFKLRAPAP01	Appliation Base Data
AREA_CODE	Contractor Area Code
SERVICE_REF	Service Reference
SERVICE_STS	Service Status
COMMENTS	Comments

Export Format – Application and Services Data

This is the name of the Export Format that will contain Service Data. Included in the available fields to be exported are :

Selected Field	Description
TFKCBTSJOB	Scheduled Job
TFKLRAPAP01	Appliation Base Data

MISCCODE	Miscellaneous Data
MISCDESC	Miscellaneous Details
MAJORCODE	Action Required
MAJORDESC	Description
APPLNUMBER	Application Number
LODGEDATE	Lodgement Date
APPLDESCR	Description
TYPECODE	Application type
TYPEDESC	Application Type Details
MINORCODE1	Minor Development Category
MINORDESC1	Description
MINORCODE2	Minor Development Category
MINORDESC2	Description
MINORCODE3	Minor Development Category
MINORDESC3	Description
APPLICANTS	Applicant
APPLCOMM1	Communication Type 1
APPLCOMM2	Communication Type 2
APPLCOMM3	Communication Type3
PRMPROPTPK	Property TPK
PROPSUB	Sub-Property Sequence
ASSESSMENT	Rates Assessment Number
PROPREFIX	Prefix
PROPNAME	Property Name
UNITNUM	Start Unit Number
UNITSFX	Start Unit Suffix
STRTNUM	Start House Number
STRTSFX	Start House Suffix
STRTNAME	Street Name
SUBURB	Suburb Name
FMTADDRESS	Formatted Address
SERVADDRESS	Property Services Address
SERVCODE1	Service Code 1
SERVDESC1	Service Code Description
SERVAREA1	Area Code
SERVREF1	Service Reference
SERVCOMM1	Comments
SERVSTAT1	Service Status
SERVCODE2	Service Code 2
SERCDESC2	Service Description
SERVAREA2	Area Code
SERVREF2	Service Reference
SERVCOMM2	Comments
SERVSTAT2	Service Status
SERVCODE3	Service Code 3
SERVDESC3	Service Description
SERVAREA3	Area Code
SERVREF3	Service Reference
SERVCOMM3	Comments
SERVSTAT3	Service Status
SERVCODE4	Service Code 4
SERVDESC4	Service Description
SERVAREA4	Service Area
SERVREF4	Service Reference
SERVCOMM4	Comments
SERVSTAT4	Service Status
SERVCODE5	Service Code 5
SERVDESC5	Service Description
SERVAREA5	Area Code
SERVREF5	Service Reference

SERVCOMM5	Comments
SERVSTAT5	Service Status

Job Type

This selection will allow the user to run the job in Report only mode – ie report upon the details that will be extracted, but does not update Status information nor produce a file. Update and Report will produce the report and also update the the Status and will also produce a file.

Application Staged/Amended Parameter Wizard

Application Timesheet Entry

New timesheet entry functionality has been provided to allow quicker entry of timesheets for work performed on Applications and Licences.

NOTE: The new Timesheet Entry function will be available only to sites that have the required authority. Contact your Account Manager if your site requires this new functionality.

Timesheet Parameter Maintenance

This new parameter option (Workflow > Timesheet Entry > Timesheet Week) has been provided to allow the site to set how their Timesheet week is determined e.g. Monday to Sunday or Monday to Friday etc. This parameter will be used when displaying the relevant Timesheet Records in the new Timesheet Selection form.

User Parameter Maintenance

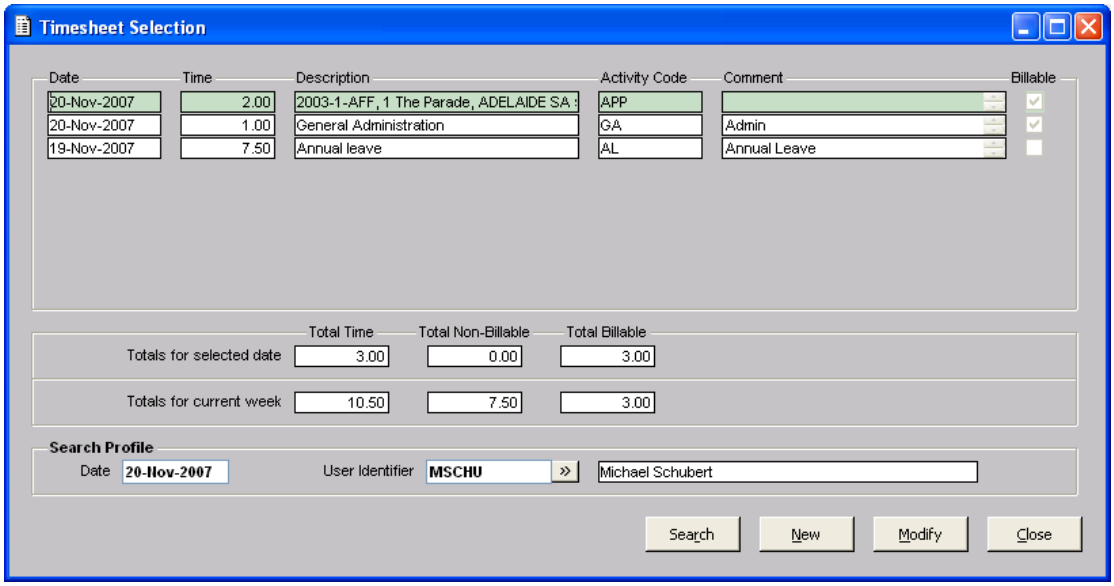
This existing parameter option (Workflow > User Parameter Maintenance) has been enhanced to allow each user to have their own a Default Activity set. When timesheet entries are being entered for a user in the new Timesheet Entry form their Default Activity will be automatically loaded into the entry.

Timesheet Entry

This new function is accessed from the new Workflow > Timesheet Entry > Timesheet Entry option.

Timesheet Selection form

Selecting this option presents the Timesheet Selection form. This form will not show any timesheet entries initially; the User Identifier field will be automatically set to the user that is signed on.



Pressing the Search button will load the timesheets for the nominated user for the week pertaining to the nominated Search Profile date - if no date is nominated then the current date is used. The system will interpret this date based on the value entered in the Timesheet Week parameters and display the records for that week for that particular user. The latest entries will be displayed at the top of the form.

There are two 'totals' lines:-
1) Totals for selected date:
- This shows the total of the timesheet entries for the timesheet entry line that has focus.
- If there is a timesheet entry for the Search Profile date then the first entry for that date will get focus automatically upon pressing Search and thus show the total time for that date. If this is not the case then no entry line will get focus leaving the totals empty.

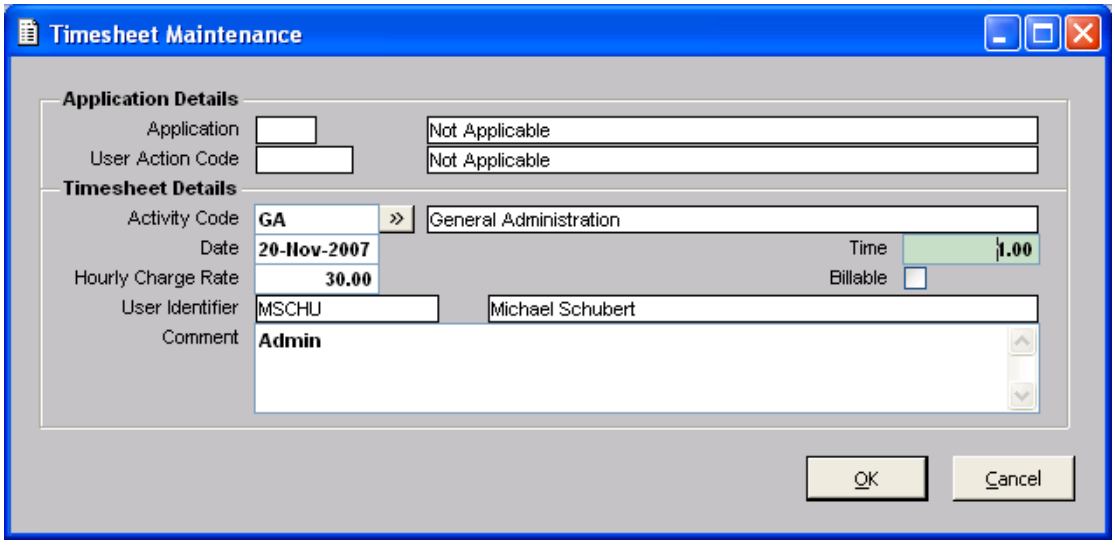
2) Totals for current week:
- This shows the total of the timesheet entries for the week as dictated by the nominated Search Profile date.

Note:-
If the nominated date is not within a Timesheet Week when Search is pressed, a message is shown on the message line and the entered date is highlighted. If there are no entries for the week then a message is shown in the message line.

Pressing the Modify button for an existing entry will show the standard Timesheet Maintenance form.
Pressing the New button will present the new Timesheet Entry form.

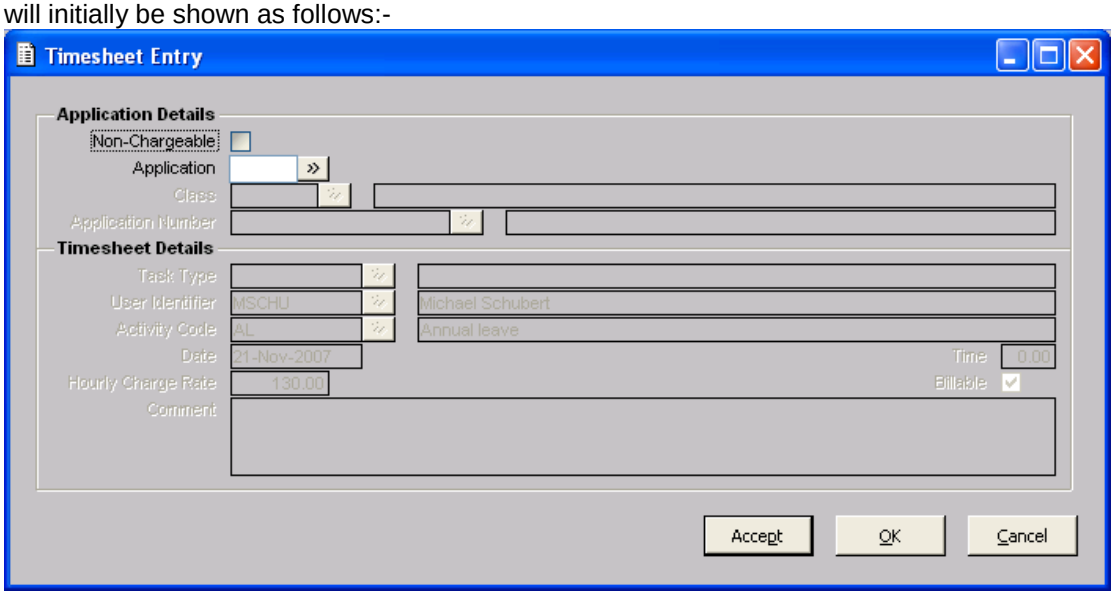
Timesheet Maintenance form

Pressing the Modify button on the Timesheet Selection form will show the standard Timesheet Maintenance form. Note: The Entry will not be able to be maintained if the Timesheet Entry is for a Task which is Completed.



Timesheet Entry form

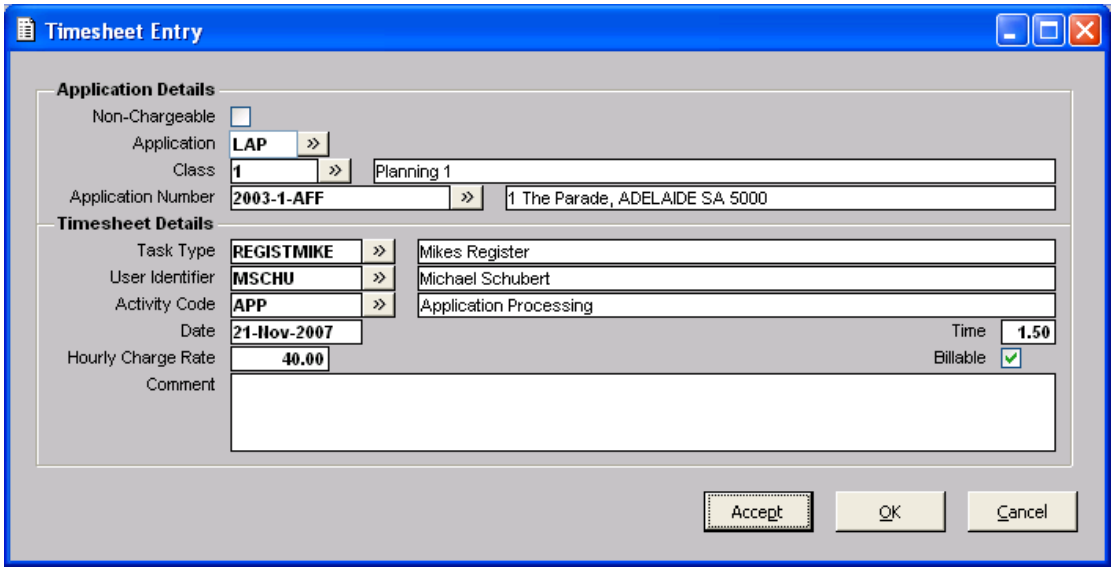
Pressing the New button on the Timesheet Selection form will present the new Timesheet Entry form, and it will initially be shown as follows:-



Timesheet entries can be entered for a specific Application/Licence or not as governed by the setting the Non-Chargeable checkbox – this also controls which fields are relevant for entry. By leaving the Non-Chargeable checkbox unchecked details can be entered for a specific Application/Licence. By checking it on 'Non-Chargeable' entries can be entered, in which case the cursor is automatically placed into the Activity Code field.

Entering details for a specific Application/Licence

The following will occur when entering details for a specific Application/Licence (i.e. the Non-Chargeable checkbox is unchecked). An entry with all the details entered looks as follows. Note that fields are only shown when previous fields have had details entered or chosen (e.g. the Application Number can not be entered until the Class has been nominated).



The Application can be chosen by entering ‘LAP’ or ‘LLC’ or by using the Popup/double clicking in the field. Once a valid code is present the Class field is made available.

The Class can be chosen by entering the Class code or by using the Popup. Only Classes the user is authorised to can be entered. Once a valid code is present the Application Number field is made available.

The Application Number can be chosen by entering certain details of the Application/Licence Number or by using the Popup. If the Application Number is to be entered directly into the field it is to be entered in the format of ‘Number/Year/Type’ (i.e. having ‘/‘ separators between each identifier). For example, to enter details for Application Number 1 enter ‘1’; to enter details for Application Number 1 and Year 2007 enter ‘1/2007’. Details can be entered with any number of the identifiers; e.g. details could be entered as ‘/2007/AT1’ which would cause the Application/Licence Selection form to be displayed showing all the Applications for the 2007 Year of the AT1 Type. If the entered details can be resolved to a specific Application the formatted Application Number is loaded into the field. Where there is more than one occurrence of the number such as would be the case with Staged or Amended numbers, the user would be presented with the Application/Licence Selection form to choose the correct record. Note: The formatted Application Number loaded to the form may be in different format to the ‘Number/Year/Type’ entry format as governed by the formatting parameters. Therefore if the Application Number chosen is to be changed the user must enter the new details in the ‘Number/Year/Type’ entry format.

The Task Type can be chosen by entering the code or by using the Popup. Only Tasks that have been defined in the parameters as a Timesheet Task can be entered / chosen. A Timesheet Task is denoted by the Task having any action associated to it that has ‘Time Recording’ ticked on.

When leaving the Task Type field the form checks the status of that Task on the nominated Application/Licence. The following scenarios can occur:-

1) The Task is not found on the Application or it is found but it is Completed.

In this case the user is asked if they wish to create a new occurrence of that Task.

Answering ‘Yes’ will attempt to create an entry of that Task against the Application/Licence and start the Task which will cause the existing Timesheet Maintenance form to be presented allowing Timesheet details to be entered. Once the task actions have been completed the new Timesheet Entry form is redisplayed with the Application and Class retained and the Application Number etc. cleared for the next entry.

If the user does not have authority to Insert Tasks then an error message will be shown and the timesheet entry can not be proceeded with.

The Task that was created will be positioned within the existing set of Tasks for the Application/Licence according to the Class’s Workflow ‘Task Sequence’ parameter. If this parameter is set to ‘As Entered’ then the new task will be created as the first Task of the Application/Licence so that it is shown at the top of the of the list of workflow Tasks.

Answering 'No' will not create an entry of that Task, and will clear out the Application Number and Task and position the cursor in the Application Number field.

2) The Task is on the Application and is Started but not Completed.

In this case the timesheet entry can be entered in the bottom half of the form. See further details in the next section that describes the functionality available in the bottom half of the form.

If the Task has multiple Actions which have Time Recording checked On then the timesheet will be linked to the first Action of the Task as per existing functionality. In this instance the 'Additional User Actions may also require Timesheets. Access these Actions through Task Maintenance' warning message will be shown per existing functionality.

3) The Task is on the Application but is not Started.

In this case the Task will be started allowing timesheets to be entered as part of that task. Once completed the new Timesheet Entry form is redisplayed with the Application and Class retained and the Application Number etc. cleared for the next entry.

Entering details in the bottom half of the form.

Details are entered in this part of the form when:-
1. Timesheet entries are not being entered for a specific Application/Licence or,
2. Timesheet entries are being entered an Application/Licence and the nominated Task is already started but not yet completed.

The User Identifier is defaulted to the User nominated on the Timesheet Selection form. The user can then be changed on the Timesheet Entry form and will be retained until the Timesheet Entry form is exited. Based upon the User selected the form will load the Default Activity and Hourly Charge Rate as set in the User Parameter Maintenance. Where no default Activity has been set the field will be left blank with the ability to key directly into the field or selected.

An Activity must be entered when a timesheet is not being entered for a specific Application/Licence. If details are being entered for a specific Application/Licence then an Activity must be entered if the Class has the Mandatory Activity parameter checked on (this parameter is within the Application/Licence Parameters menu option - in the Workflow > Work Flow Application Maintenance parameter).

The Date field defaults to the current date but can be changed. If a date is changed it will remain until the user returns to the menu or changes it to a different date. This allows users to continuously key a number of timesheets for any given date without having to continually change the date. If a date is entered that does not fall within the defined Timesheet Week then a warning message is issued when the Accept or OK buttons are pressed, allowing the user to accept the entry or to correct it.

Hourly Charge Rate is set to zero if Non-Chargeable is checked on, and reset to the default rate for the nominated User if Non-Chargeable is checked off.

The Billable flag is defaulted checked off if Non-Chargeable is checked on, and checked on if Non-Chargeable is checked off. If it is changed to be off for a Chargeable entry the Hourly Charge Rate is set to zero.

A Comment must be entered when a timesheet is not being entered for a specific Application/Licence. If details are being entered for a specific Application/Licence then a Comment must be entered if the Class has the Mandatory Comment parameter checked on (this parameter is within the Application/Licence Parameters menu option - in the Workflow > Work Flow Application Maintenance parameter).

<u>Other</u>

Once details have been entered they can be accepted by pressing the Accept button, the F6 button or the OK button as follows:-

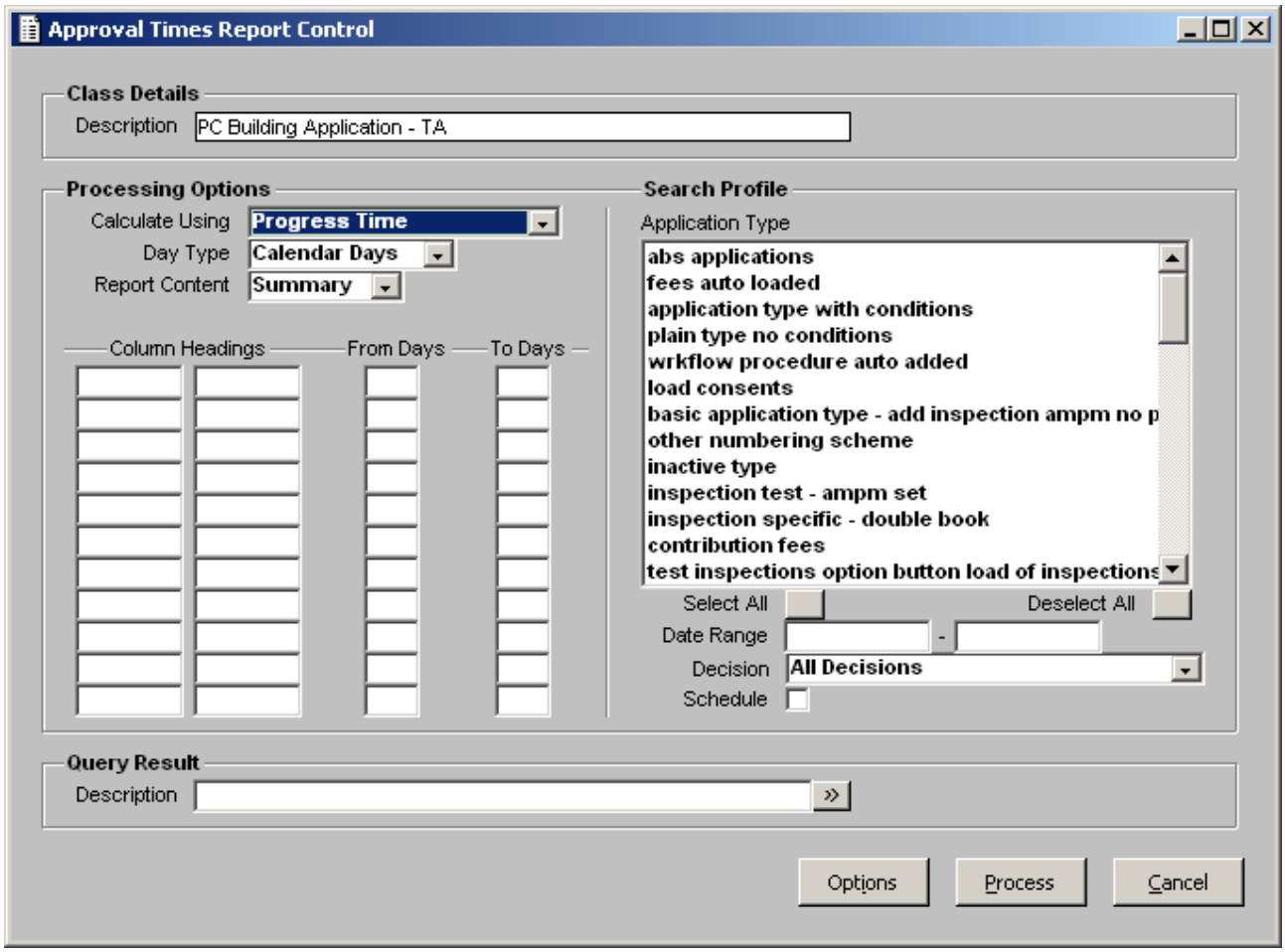
- Pressing the Accept button or F6 button will validate the entry and if correct store the details, then show the 'Timesheet Entry added' message and refresh the form for the next entry. In the case where an entry was made for a specific Application/Licence some of the entered details will be retained for the next entry (e.g. the Class, Application Number, Task Type, etc.). The Activity Code and the Hourly Charge Rate will be refreshed to the defaults for the User. The Time, Billable and Comment fields will be reset ready for the next entry. Retained details can be changed for the next entry or the Non-Chargeable field can be used to change the entry mode thus causing certain fields to be cleared.
  Note: The Task Type is retained in certain circumstances, but is cleared when the Class is changed as the actual Task Type for one Class is difference to a Task Type for another Class even though the two Tasks may have the same code.
- Pressing the OK button will validate the entry and if correct store the details and return to the Timesheet Selection form.

To allow quicker entry, tabbing from one field to the next has been enabled so that the tab button only needs to be pressed once to move to the next input field. This is useful for those fields which have a Popup button – for example, when a Class code has been entered into the Class field the tab button only has to be pressed once for the cursor to be placed into the Application Number field.

Approval Times Report

Approval Times Report Control Form

The Approval Times Report allows the User to create a report based on specific criteria entered. Several fields may be chosen as part of this criterion. The Report may be generated instantly as an interactive report, or may be 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.



Approval Times Report Form

Class Details - Description
Displays the Class Description.

Processing Options - Day Type
The Day Type may be selected from the drop down list. The selection options are;

- Calendar Days
- Work Days

Calendar Days are displayed inside the brackets in the Approval Time field on the Application Summary Form.
Work Days are displayed to the left of the brackets in the Approval Time field on the Application Summary Form.

NOTE: - where the authorised function 'Use Application Date for Calculations' has been flagged on then the values shown are using the Application Date and not the Lodgement Date to determine Progress Times.

Processing Options - Calculate Using

The Calculate Using field is populated from the drop down list. The selection options are;

- Progress Time
- Included Tasks Only (when selected this option will also display Suspend Times on the report)

NOTE: - where the authorised function 'Use Application Date for Calculations' has been flagged on then the values shown are using the Application Date and not the Lodgement Date to determine Progress Times.

Processing Options - Report Content

The Report Content can be selected from the drop down list. The selection options are;

- Summary
- Detailed

Processing Options - Column Headings

These fields display a description for the Column Headings used in the report, for example
1 Day 5 Days
6 Days 10 Days

Processing Options - From Days/To Days

These fields allow the User to enter the days required for the report, for example
1 5
6 10
Using these examples will include all applications that have been approved within 1 to 5 days and 6 to 10 days and that meet the selection requirements.

Search Profile - Application Type

This field displays a list of all the Application Types associated with the selected Application Class.

To select an Application Type click on the required record, one or many may be selected.

Select All

Clicking on the Select All Button highlights all the Application Types listed in the Application Type Field.

Deselect All

Clicking on the Deselect Button deselects all the highlighted Application Types in the Application Type field.

Search Profile - Decision Date Range

This date field allows for the entry of a "To" and "From" range to be included in the Report.

Schedule Check Box

When the Schedule box is checked on it enables the User to schedule a regular batch report for a predefined date range for a 12 month period or longer via an end of day process.
Once a date range has been entered, the Schedule box is checked on and the Process button is selected, the Processing Options Maintenance Form is displayed. From the Run Time drop down field select End of Calendar Days option. This will bold the Schedule Button.
Select the Schedule Button and the Scheduling Options Maintenance Form is displayed.

A Schedule Date Range can be entered. From the Frequency drop down select the required option;

- Daily
- Weekly
- Fortnightly
- Monthly
- (none)

From the Run Day select the required day.

Should an exception to the running of the report be required, these exception dates can be selected by using the Calendar button.

The first time the report is run the entered date range will be used, after that the report will use the last date run as the start date and include all dates to the current run date of the report.

Search Profile - Decision

The Decision may be used to select a Decision range for Reporting on. From the Decision drop down select the required option;

- Approvals Only
- Rejections Only
- Decisions not Approvals or Rejections
- All Decisions
- No Decisions

When any of these options are selected (except for 'No Decision'), the entered Date Range is matched against the latest Application Decision Date. When 'No Decision' is selected, the Date Range is matched against the Lodgement Date for Application.

This enables the User to limit the number of Applications reported on when using the 'No Decision' option.

Query Result - Description

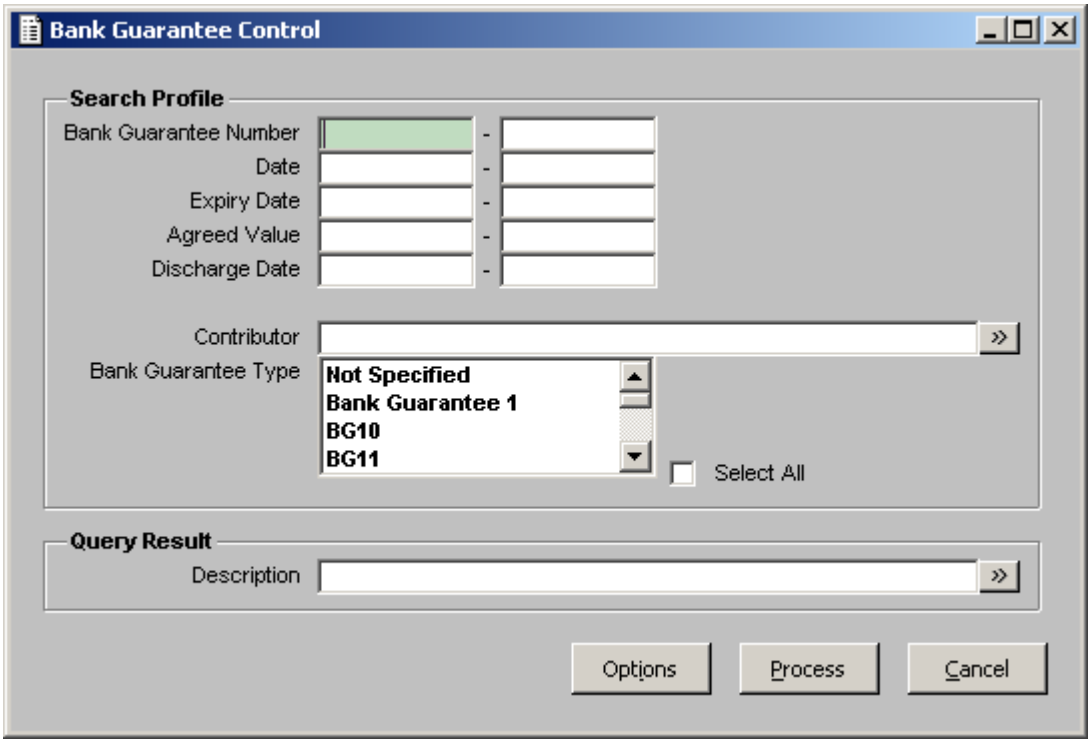
The Query form allows the User to use the Pop Up Button to select a predefined Query to run over the Report. For Further information on Query and creating Queries to run, please refer to the Query Manual.

Bank Guarantee Control

Bank Guarantee Control Form

The Bank Guarantee Report allows the User to create a report based on specific criteria entered. Several fields may be chosen as part of the 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.

When running the report it is automatically assused to select All the Types until certain Types are selected for the processing.



Bank Guarantee Control Form

Bank Guarantee Number

The Number Range may be used to select a particular “from” and “to” range of Applications required for Reporting on. Enter data in the first field and tab to the second field to enter a “to” number.

Date

The Date Range may be used to select a particular “from” and “to” range of Applications required for Reporting on. Enter a date in the first field and tab to the second field to enter a “to” date. This Date is the Date of the Bank Guarantee record.

Expiry Date

The Expiry Date Range may be used to select a particular “from” and ‘to” rang of applications required for Reporting on. Enter the date in the first field and tab to the second field to enter the ‘to’ date. This Date is the Expiry Date that has been entered onto the Bank Guarantee record.

Agreed Value

The Agreed Value range can be used to select a rangeof Bank Guarantees that are for a certain Agreed Value. Enter the from value in the first field followed by the to value in the second field. This value is the value that has been entered into the Agreed Value on the Bank Guarantee record.

Discharge Date

The Discharge Date rang can be used to select a range of bank Guarantees that are for a certain Discharge Date range. This value is the value that has been entered into the Discharge Date field on the bank Guarantee record.

Contributor

Enter the name of the Contributor, for example Smith, Paul and tab out of the field. The Contributor Name Selection form will be displayed to verify prior to selection.

The Pop Up Button may be used to select a particular Contributor from a list of Contributors.

Bank Guarantee Type

If only particular Bank Guarantee Types are required then the User can highlight the required Types in this area. If nothing is highlighted then it is assumed that all is required.

Select All

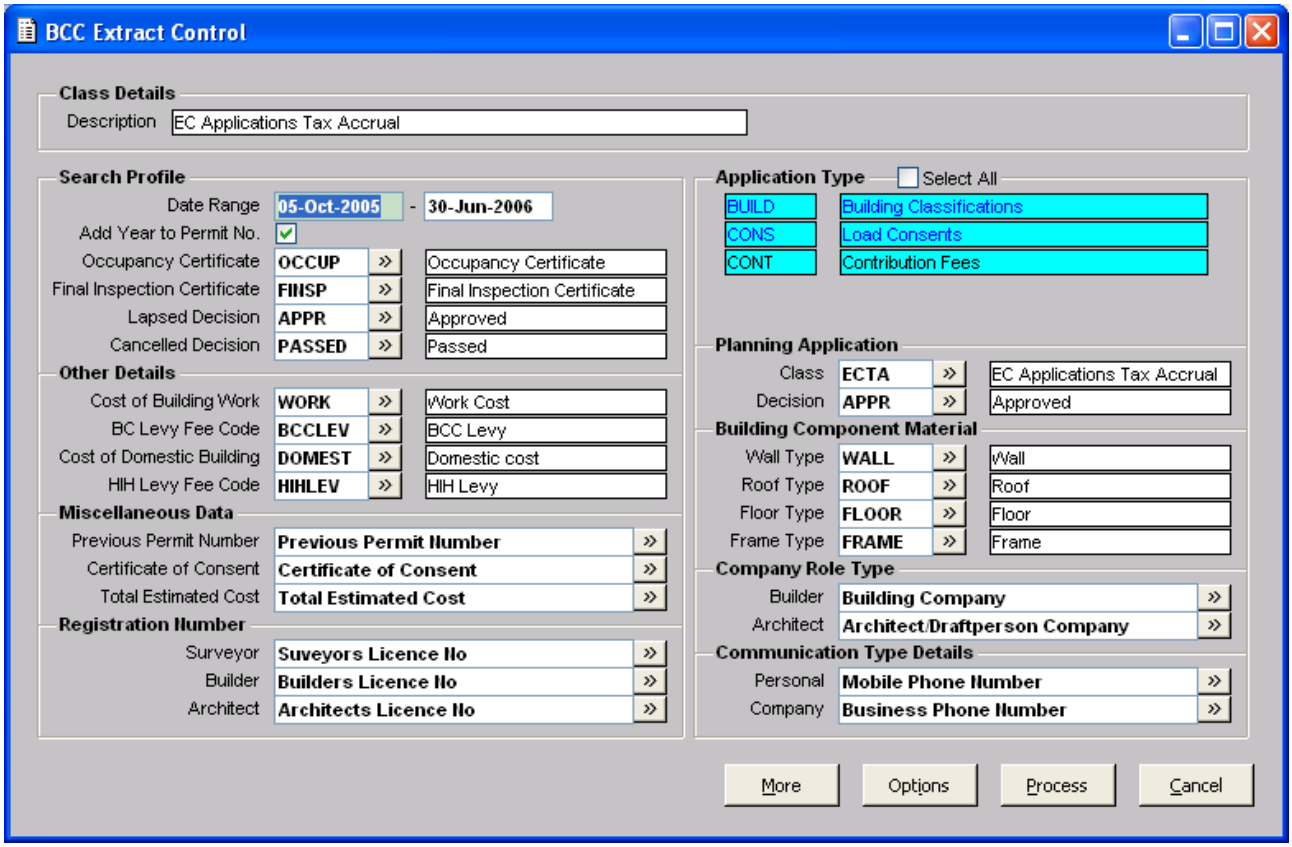
Selecting the Select All option will hightlight all the Types available for selection to be included in the report. Select All is assumed when nothing is highlighted in the Type field.

Query Result - Description

The Query Result Option may be used. The Pop Up Button may be selected to choose from any pre-defined Queries.

BCC Report

Building Statistics Extract Report Control Form

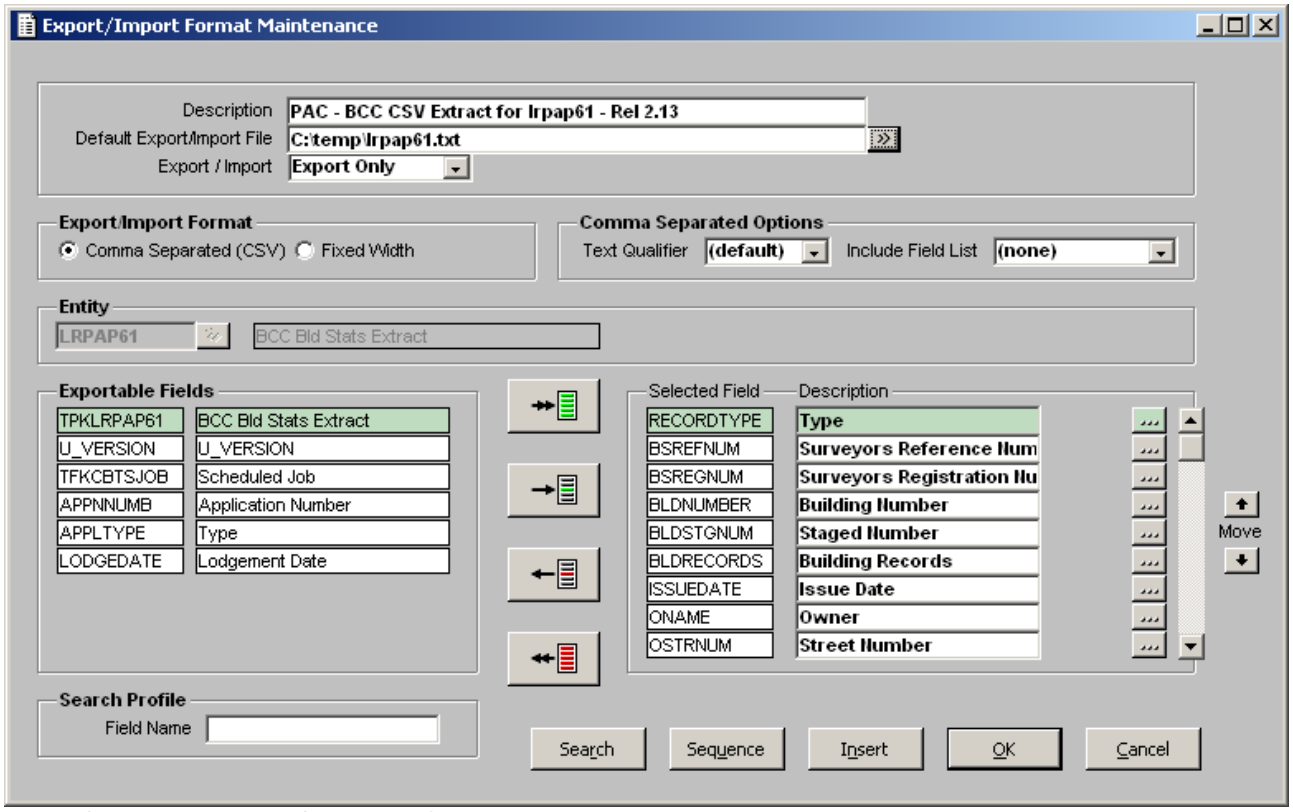


Building Statistics Extract Report Control Form

The BCC report has been upgraded to make it more adaptable to any changes implemented by the Building Commission Control in the future. If the length of any of the fields, the format of any fields or constant fields are changed, then the modifications can be reflected in the extract file without having to re-code any forms. The changes can be made on-line and on site by the customer.

The BCC extract files format need to be set up before the BCC report can be run. To do this, start a run time session. From the Menu go to Query, Query Parameters, and Export/Import Format Maintenance to get the Export/Import Format Search Profile. There are three files - LRPAP61, 62 and 63 to be setup. Enter “LRPAP61” into the Entity field and press search. If no occurrences match the search profile, then press NEW.

On the Export/Import Format Maintenance form, enter the description and the path for the extract file. Set the field Export / Import to Export Only, set the Export/Import Format to Comma Separated and set the field Entity to LRPAP61 (see figure 1.1).

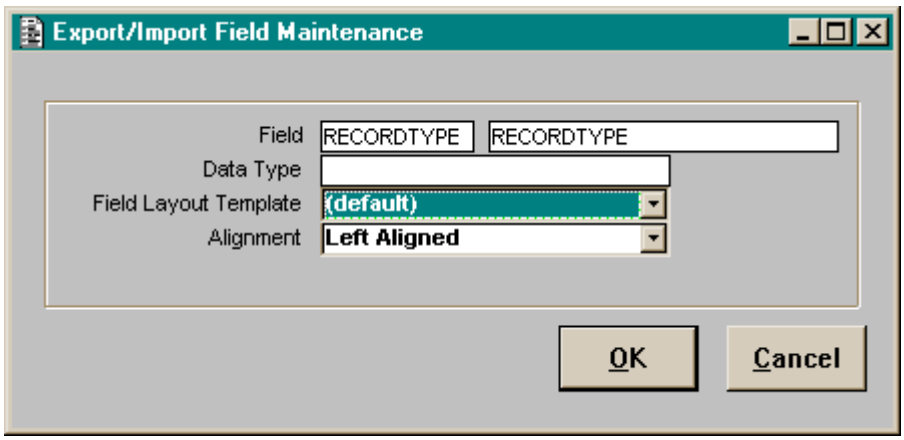


Export/Import Format Maintenance form.

From the Exportable Fields section, select the required fields using the select button. The definition of the BCC extract report fields and the corresponding LRPAP61 fields can be found in table A in Appendix A.

For fields that are required in the extract file but are not stored in the entity LRPAP61, such as a standard field that can be displayed on every entry (application), then use the insert button and the move buttons to put the field in the correct order in the extract file. In the description column, put the value for that field and set the length required. Note that for the fields added in this way, the value in the description column will appear in every record in the extract file as entered.

For fields where the format of the extract file may be different from the format of the LRPAP61 field then use the detail button for that field (see figure 1.1) to get to the Export/Import Field Maintenance form (see figure 1.2).



Export/Import Field Maintenance form.

For the example of RECORDTYPE, the format of the Field Layout is set to default. This could be changed to Upper or Lower Case and the Alignment could be changed to Right Aligned if required. To change this, select the required format from the Field Layout Template dropdown (see figure 1.2) then press OK.

Format Masks have been used on the Field Layout Template;

DATE fields dd/mm/yyyy

Item 1 in LRPAP62 (as only one record per council is required the Format Mask is used)
BSREGNUM 9999999999
Enter Council's unique identifier for Surveyor

Note: Ensure that all the required fields have been selected and added where required to the specifications in each table. Once this has been completed create the other extracts LRPAP62 and LRPAP63 as above and then the BCC report can be run.

Appendix A
Table A Record Structure for the provision of building approvals to the BCC.
LRPAP61- BCC NAME FILE – PLSPER.TXT

Item #	Item Name	Description	Format	LRPAP61 field
1	Record Type	Record Type for Application		RECORDTYPE
2	Building Surveyor Registration Number	Building Surveyor Registration Number		BSREFNUM
3	Issuing Building Surveyor Reg. Number	Issuing Building Surveyor Reg. Number	9999999999	BSREGNUM
4	Building Permit Number	Building Permit No		BLDNUMBER
5	Building Permit Stage Number	Building Permit Stage Number		BLDSTGNUM
6	Multiple Building Information Records	Multiple Building Information Records		BLDRECORDS
7	Date of Permit Issue	Date of Permit Issue	dd/mm/yyyy	ISSUEDATE
8	Date of Application	Date of Application	dd/mm.yyyy	APPLNDATE
9	Previous Permit No.	Pevious Permit Number		PPERMNO
10	Property Owner	Property Owner		ONAME
11	Owner Street Number	Owner Street Number		OSTRNUM
12	Owner Street Name	Owner Street Name		OSTREET
13	Owner Suburb/Town	Owner Suburb/Town		OSUBURB
14	Owner State	Owner State		OSTATE
15	Owner Post Code	Owner Post Code		OPOSTCODE
16	Owner Telephone	Owner Telephone		OCOMMDTLS
17	Owner Builder	Owner Builder		OBUILDER
18	Certificate of Consent	Certificate of Consent		CERTCONS
19	Property Number	Property Unique Number		UNIPROPID
20	Site Lot Number	Site Lot Number		SLOTNUM
21	Site Street Number	Site Street Number		SSTRNUM
22	Site Street Name	Site Street Name		SSTREET
23	Site Suburb/Town	Site Suburb/Town		SSUBURB
24	Site Post Code	Site Post Code		SPOSTCODE
25	Site Municipality Code	Site Municipality Code		BCCMUNC
26	Ownership Sector	Ownership Sector eg Private, Commonwealth		OWNERSECTR

		Gov, State Gov, Local Gov	
27	Builders Registration Number	Builders Registration Number	BREGNUM
28	Builders Name	Builders Name	BNAME
29	Builder's Company Name	Builder's Company Name	BCOMPNAME
30	Builders Street Number	Builders Street Number	BSTRNUM
31	Builders Street Name	Builders Street Name	BSTREET
32	Builders Town/Suburb	Builders Town/Suburb	BSUBURB
33	Builders State	Builders State	BSTATE
34	Builders Post Code	Builders Post Code	BPOSTCODE
35	Builder Communication Type Details	Builder Communication Type Details	BPHONE
36	Architect/Draftsperson's Reg. Number	Architect/Draftsperson's Reg. Number	ARCHREGNO
37	Architect/Draftsperson	Architect/Draftsperson	ARCHNAME
38	Architect/Draftsperson's Company	Architect/Draftsperson's Company	ARCHCOMP
39	Architect/Draftsperson's Communication Type Details	Architect/Draftsperson's Communication Type Details	ARCHPHONE
40	Nature of Work Code	Nature of Work Code	WORKTYPE1
41	Nature of Work Code	Nature of Work Code	WORKTYPE2
42	Nature of Work Code	Nature of Work Code	WORKTYPE3
43	Nature of Work Code	Nature of Work Code	WORKTYPE4
44	Nature of Work Code	Nature of Work Code	WORKTYPE5
45	Building Classification	Building Classification	BLDCLASS1
46	Building Classification	Building Classification	BLDCLASS2
47	Building Classification	Building Classification	BLDCLASS3
48	Building Classification	Building Classification	BLDCLASS4
49	Building Classification	Building Classification	BLDCLASS5
50	Description/Use of Building	Description/Use of Building	DESCR
51	Allotment Area	Allotment Area	ALLOTAREA
52	Total Floor Area	Total Floor Area	TOTFLRAREA
53	Number of Storeys	Number of Storeys	NUMSTOREYS
54	Floor Material	Floor Material	BCCFLOOR
55	External Wall Material	External Wall Material	BCCWALL

56	Roof Cladding Material	Roof Cladding Material		BCCROOF
57	Frame Material	Frame Material		BCCFRAME
58	Number of Existing Dwellings	Number of Existing Dwellings		EXISTDWELL
59	Number of Dwellings Demolished	Number of Dwellings Demolished		DEMDWELL
60	Number of New Units	Number of New Units		NUMUNITS
61	Solar Hot Water	Solar Hot Water	Only value of 1st Building type is output	SOLARWATER
62	Rainwater Tank	Rainwater Tank	Only value of 1st Building type is output	RAINWATER
63	Planning Permit Number	Planning Permit Number		PLNPERMNO
64	Date of Issue of Planning Permit	Date of Issue of Planning Permit	dd/mm/yyyy	DTEPERMIS
65	Total Estimated Cost	Total Estimated Cost		TOTESTCOST
66	Cost of Work	Cost of Work		WORKCOST
67	Levy Amount	Levy Amount		LEVYAMOUNT
68	Cost of Domestic Building Work	Cost of Works		DOMESTCOST
69	HIH Levy Amount	HIH Levy		HIHLEVYAMT
70	Levy Total	Total Levy		LEVYTOTAL

Table B Record Structure for provision of Summary extract for the BCC – LRPAP62
LRPAP62 – BCC NAME FILE – PLSSUM.TXT

Item #	Item Name	Description	Format	LRPAP62 field
1	Insert blank line	Council Unique Identifier for BS Reg No		-
2	Return Year	Return Year		RETURNYEAR
3	Return Month	Return Month		RETURNMTH
4	Total Levy Amount	Total Levy Amount		TOTLEVYAMT

Note: Item 1 must contain the Council's Unique Identifier for the Building Surveyors Reg. Number. This Reg. Number is keyed directly into the Description field of Export/Import Format Maintenance form.

Table C Record Structure for provision of Certificate Data extract for the BCC – LRPAP63
LRPAP63 – BCC NAME FILE – PLSCERT.TXT

Item #	Item Name	Description	Format	LRPAP63 field
1	Issuing Building Surveyor Registration Number	Issuing Building Surveyor Registration Number	9999999999	BSREGNUM

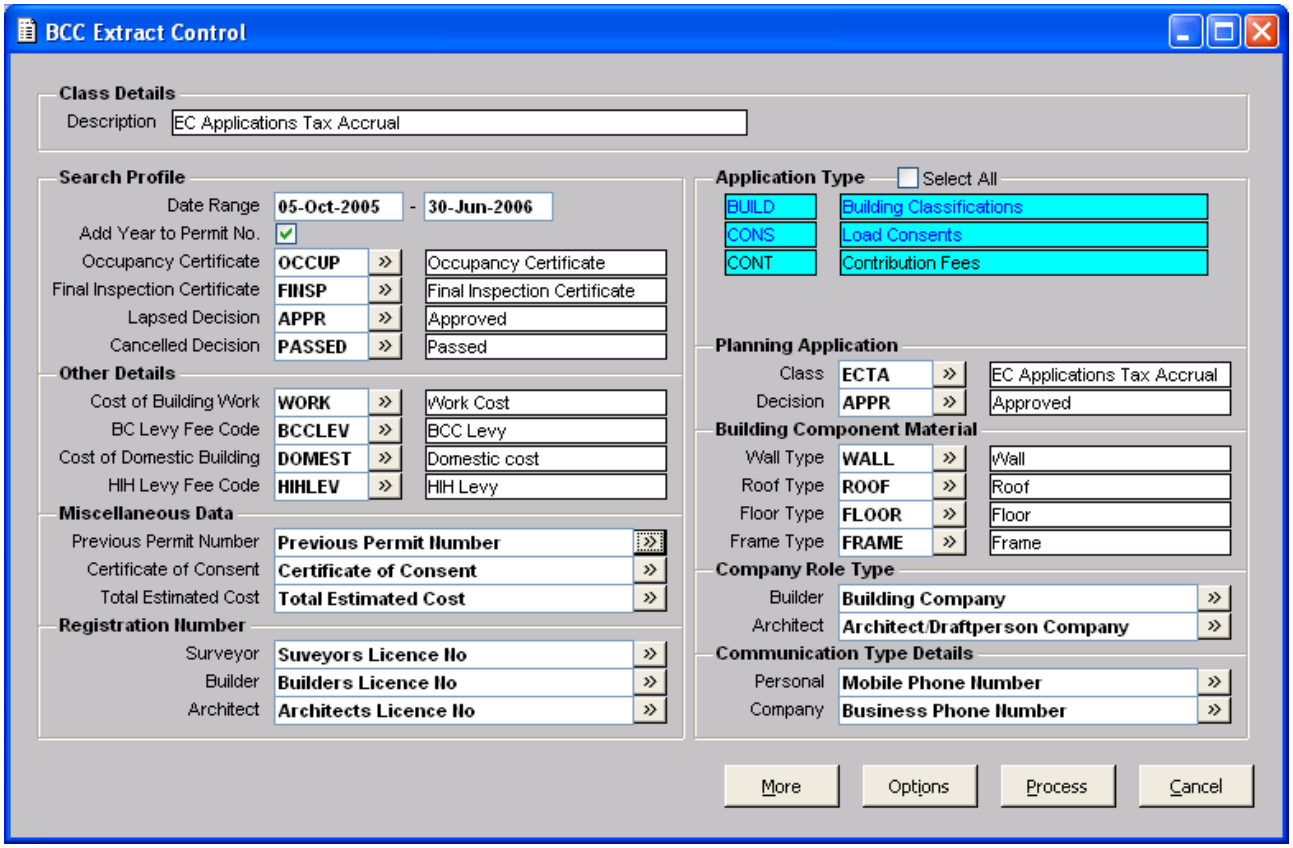
2	Building Permit Number	Building Permit Number		BLDNUMBER
3	Building Permit Stage Number	Building Permit Stage Number		BLDSTGNUM
4	Date of Permit Issue	Date of Permit Issue	dd/mm/yyyy	ISSUEDATE
5	Commencement of Works or First Inspection Date	Commencement of Works or First Inspection Date	dd/mm/yyyy	COMMWORKS
6	Date of occupancy permit/certificate of final inspection	Date of occupancy permit/certificate of final inspection	dd/mm/yyyy	OCCUPYDATE
7	Occupancy permit/certificate of final inspection certificate number	Occupancy permit/certificate of final inspection certificate number		OCCUPYNO
8	Date the project or permit lapsed or was abandoned	Date the project or permit lapsed or was abandoned	dd/mm/yyyy	DATELAPSED

Requirements for BCC to produce data:

- Application must have an approval decision
- Names against applications must have appropriate phone numbers
- Application should have builder and surveyor
- These surveyors and builders should have on the role maintenance - surveyor id and builder licence no.
- Application data should have floor area, estimated value and fee

To run a Building Control Commission Report and Extract

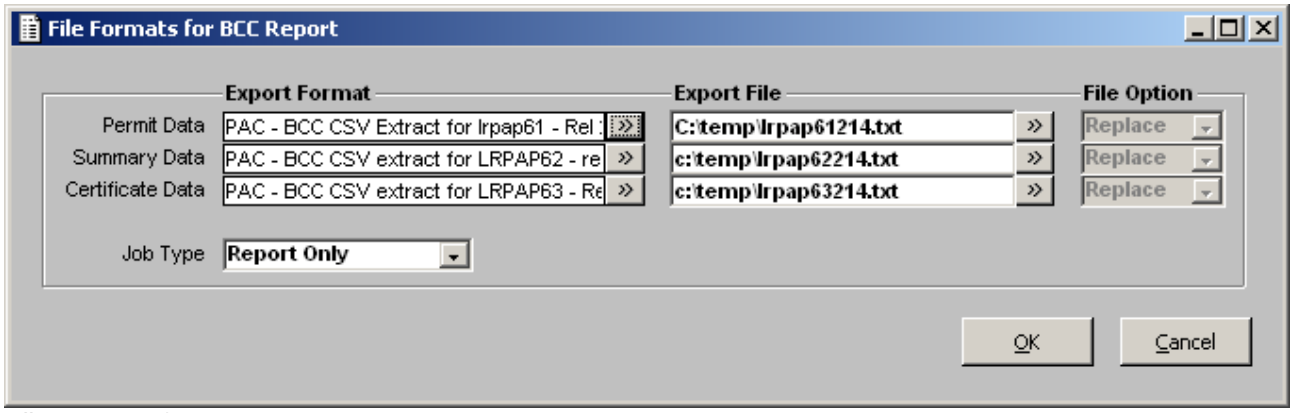
- From the Batch menu select the Building Commission Control Report button.
- Select required Class - Building Control Commission Report and Extract form is displayed.
- Select required data from the pop up forms (be careful that data matches data labels – eg Occupancy Certificate = COO Certificate of Occupancy)
- Enter Decision Date Range and highlight Application Type
- Select Process



Building Statistics Extract Report Control Form

Setting the file formats for the BCC Report

- Ensure that the Export File path is set correctly and that the export file has the correct .txt extension.
- The Append file option will add to the current data in the export file. The Replace option will replace the data completely with all the new data filtered for the current BCC Report.
- The Report Job Type will report only and not update the current data.
- Selecting the Update and Report Job Type will also update any report data.



File Formats for BCC Report Form

Class Details - Description
This field displays the Class Details description in full.

Search Profile - Decision Date Range
These date fields allow for the entry of a “To” and “From” date range to be included in the Report.

Search Profile – Add Year to Permit No.
Checking this flag ON will include the Application Year in front of the Application Number when outputting the Building Permit Number.

Search Profile - Occupancy Certificate

These fields allow for the entry of a Permit or Certificate Type on which to base your search. Alternatively, a selection may be made via the Permit and Certificate Pop Up.

Search Profile - Final Inspection Certificate

These fields allow for the entry of a Permit or Certificate Type on which to base your search. Alternatively, a selection may be made via the Permit and Certificate Pop Up.

Search Profile – Lapsed Decision

These fields allow for the entry of a Decision Type on which to base your search. Alternatively, a selection may be made via the Decision Pop Up.

Search Profile - Cancelled Decision

These fields allow for the entry of a Decision Type on which to base your search. Alternatively, a selection may be made via the Decision Pop Up.

Other Details - Cost of Building Work

These fields allow the entry of a Dimension Type for which costs have been defined. Alternatively, a selection may be made from the Pop Up.

Other Details – BC Levy Fee Code

These fields allow the entry of an Application Fee for which costs have been defined. Alternatively, a selection may be made from the Pop Up. This is a mandatory field.

Other Details – Cost of Domestic Building

These fields allow the entry of an Application Fee for which costs have been defined. Alternatively, a selection may be made from the Pop Up. This is a mandatory field.

Other Details HIH Levy Fee Code

These fields allow the entry of an Application Fee for which costs have been defined. Alternatively, a selection may be made from the Pop Up. This is a mandatory field.

Miscellaneous Data – Previous Permit Number

This field allows the Previous Permit Number to be extracted into the report. These details need to have been entered on the Miscellaneous Data Maintenance form on the Application.

Miscellaneous Data – Certificate of Consent

This field allows the Certificate of Consent to be extracted into the report. These details need to have been entered on the Miscellaneous Data Maintenance form on the Application.

Miscellaneous Data – Total Estimated Cost

This field allows the Total Estimated Cost to be extracted into the report. These details need to have been entered on the Miscellaneous Data Maintenance form on the Application.

Registration Number - Surveyor

This field allows for the entry of a Surveyors Registration Number. The Number can be selected from a predefined range of Information Types, by clicking on the Pop Up Button.
The Pop Up Form will be displayed once the Pop Up Button is selected: This form has a selection of Information Types that have been created through the Name and Address Module

Registration Number - Builder

This field allows for the entry of a Builders Registration Number. The Number can be selected from a predefined range of Information Types, by clicking on the Pop Up Button.

Registration Number – Architect

This field allows for the entry of an Architect's Registration Number. The Number can be selected from a predefined range of Information Types, by clicking on the Pop Up Button.

Application Type – Select All

If all Application Types are to be included in the extract then checking on the Select All field will select all Application Types available automatically highlighting them.

Application Type

These fields display the Application Types attached to the selected Class. One or more of these Types must be selected for the report.

Planning Application – Class

This field allows the selection of the Class that holds the Planning Applications.

Planning Application – Decision

This field allows the user to select the Decision Type that indicates that the Planning Application has been approved.

Building Component Material - Wall Type

This field is used to enter a Wall Type. Enter the Code required, or select the Pop Up Button. The Component Pop Up Form will be presented.
This form as detailed previously, shows a list of predefined Components for selection. The Form details the Components Codes and Descriptions for easy selection.
A Search Profile is also available for narrowing the Search if there is more than one screen full of Components.
This is a mandatory field.

Building Component Material - Roof Type

This field is used to enter a Roof Type. Enter the Code required, or select the Pop Up Button.
The Components Pop Up Form will be presented.
This form as detailed previously, shows a list of predefined Components for selection. The Form details the Component Codes and Descriptions for easy selection.
A Search Profile is also available for narrowing the Search if there is more than one screen full of Components.
This is a mandatory field.

Building Component Material - Floor Type

This field is used to enter a Floor Type. Enter the Code required, or select the Pop Up Button.
The Component Pop Up Form will be presented.
This form as detailed previously, shows a list of predefined Dimensions for selection. The Form details the Dimension Codes and Descriptions for easy selection.
A Search Profile is also available for narrowing the Search if there is more than one screen full of Components.
This is a mandatory field.

Building Component Material - Frame Type

This field is used to enter a Frame Type. Enter the Code required, or select the Pop Up Button.
The Component Pop Up Form will be presented.
This form as detailed previously, shows a list of predefined Components for selection. The Form details the Component Codes and Descriptions for easy selection.
A Search Profile is also available for narrowing the Search if there is more than one screen full of Components.
This is a mandatory field.

Company Role Type - Builder

This field allows for the selection of the Role Type to be used to identify the Builder's Company Name. The Role Type can be selected by clicking on the Pop Up Button.

Company Role Type - Architect

This field allows for the selection of the Role Type to be used to identify the Architect's Company Name. The Role Type can be selected by clicking on the Pop Up Button.

Communication Type Details - Personal

This field allows for the entry of an Personal Telephone Number. The Number can be selected from a predefined range of Communication Types, by clicking on the Pop Up Button.

The Pop Up Form will be displayed once the Pop Up Button is selected. This form has a selection of Communication Types that have been created through the Name and Address Module.

The Communication Details and Registration Number Details are from Communication and Information Types created in the Name and Address Module. The Types must have been setup and assigned to Names

associated with Applications for this information to be processed on the Building Control Commission Extract.

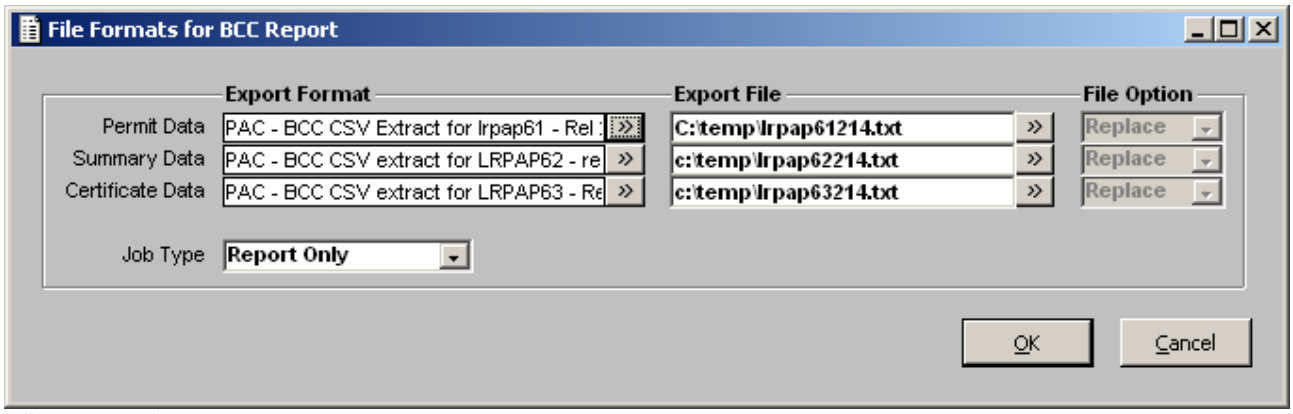
Communication Type Details - Company
This field allows for the entry of a Company Telephone Number. The Number can be selected from a predefined range of Communication Types, by clicking on the Pop Up Button.

The Pop Up Form will be displayed once the Pop Up Button is selected. This form has a selection of Communication Types that have been created through the Name and Address Module.

The Communication Details and Registration Number Details are from Communication and Information Types created in the Name and Address Module. The Types must have been setup and assigned to Names associated with Applications for this information to be processed on the Building Control Commission Extract.

File Format Button (More)
Selection of the File Format (More) Button displays the File Formats for BCC Report form which allows a previously define file format to be selected.

File Format for BCC Report Form



File Format for BCC Report Form

Permit Data - Export Format
This field allows selection of an export format via the Export/Import Format Pop Up form.

Permit Data - Export File
This field allows the entry of a filename and path to which the exported data is to be sent. Alternatively, a selection may be made via the Pop Up.

Permit Data - File Option
This field allows selection from a dropdown list. The available options are:

- Append
- Replace

The Append option will add the exported data to the end of the existing file.
The Replace option will overwrite the contents of the existing file or create a new file if one does not exist.

Summary Data - Export Format
This field allows selection of an export format via the Export/Import Format Pop Up form.

Summary Data - Export File
This field allows the entry of a filename and path to which the exported data is to be sent. Alternatively, a selection may be made via the Pop Up.

Summary Data - File Option
This field allows selection from a dropdown list. The available options are:

- Append

- Replace

The Append option will add the exported data to the end of the existing file.
The Replace option will overwrite the contents of the existing file or create a new file if one does not exist.

Certificate Data - Export Format

This field allows selection of an export format via the Export/Import Format Pop Up form.

Certificate Data - Export File

This field allows the entry of a filename and path to which the exported data is to be sent. Alternatively, a selection may be made via the Pop Up.

Certificate Data - File Option

This field allows selection from a dropdown list. The available options are:

- Append
- Replace

The Append option will add the exported data to the end of the existing file.
The Replace option will overwrite the contents of the existing file or create a new file if one does not exist.

Job Type

This field allows selection from a dropdown list. The available options are:

- Report Only
- Update and Report

The Report Only option will produce a report only without updating the database.
The Update and Report option will produce a report as well as updating the database.

Bulk Fees Reversal

The Bulk Fees Reversal Option allows for Application fees to be reversed that have either been transferred to one or more Debtors or have been lodged against the Application.

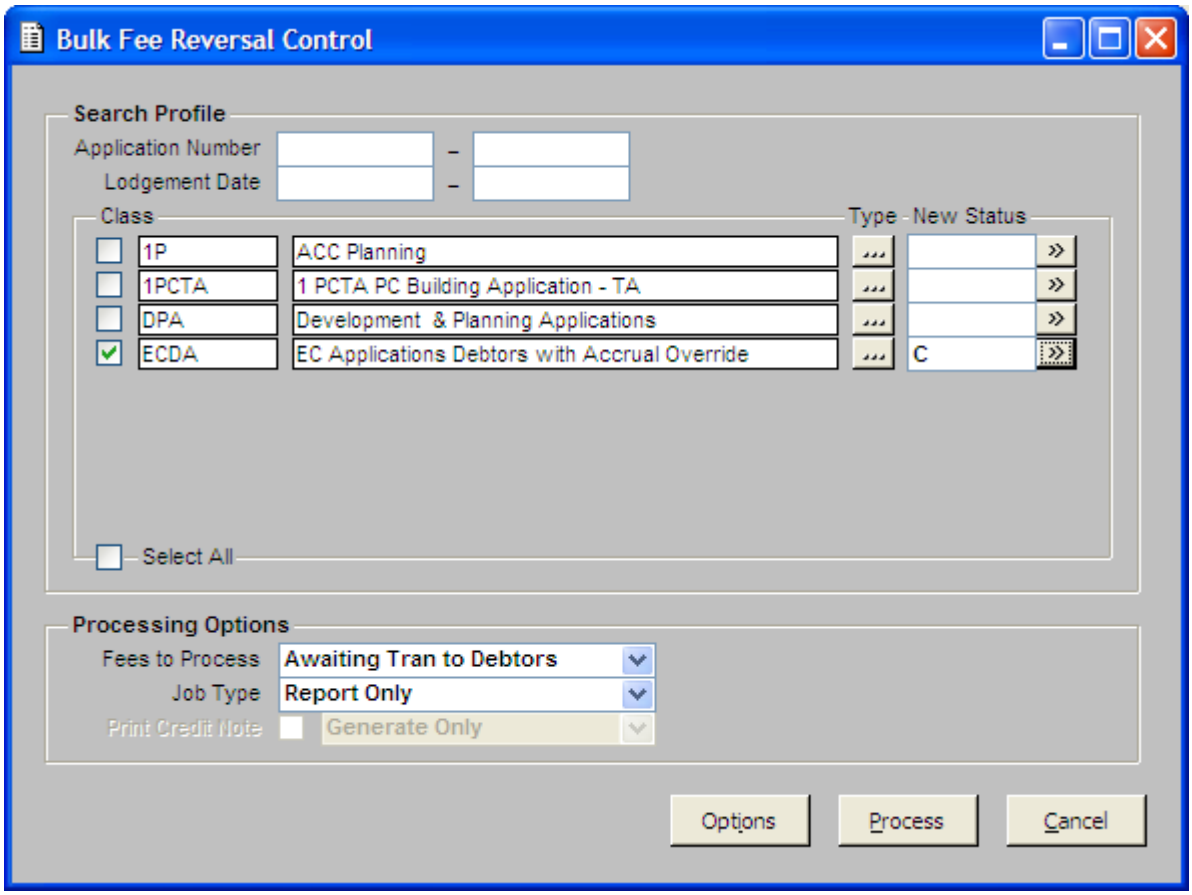
Note: It is important to note that this function requires a default credit note merge type created against the relevant Application Type:

Applications >> Application Parameters >> Select Class >> Select Type >> Lodgement >> Default Inoice Name

Bulk Fees Reversal Control Form

The Bulk Fees Reversal Control Form allows for the selection of a range of application numbers and/or lodgement dates over a list of Applications.

It is also possible to reverse all fees against all types/classes, there is also a detail out button against the class which allows for further filtering of types of applications that are required to have their fees reversed.



This process will generate a Credit Note against the specific Debtor where the status of the fees show Transferred to Debtors; where the fees are not yet transferred to a Debtor they will be deleted if possible.

Note: The Select All button will select all classes, however if in the type level of a class, only certain types have been assigned only these types will have their fees reversed.

Application Number

The Application Number range can be used to filter the process over a particular range of Application Numbers. This field can be left blank or used in conjunction with the Lodgement Date field if required.

Lodgement Date

The Application Lodgement Date range can be used to filter the process over a particular range of Applications by Lodgement Date. This field can be left blank or used in conjunction with the Application Number field if required.

Class

A list of Classes authorised to use the Bulk Fees Reversal process are shown and can be selected for the process. Select the required Class to be processed. Multiple Classes can be selected.

Class Code

This is the Class Code that may be selected.

Class Description

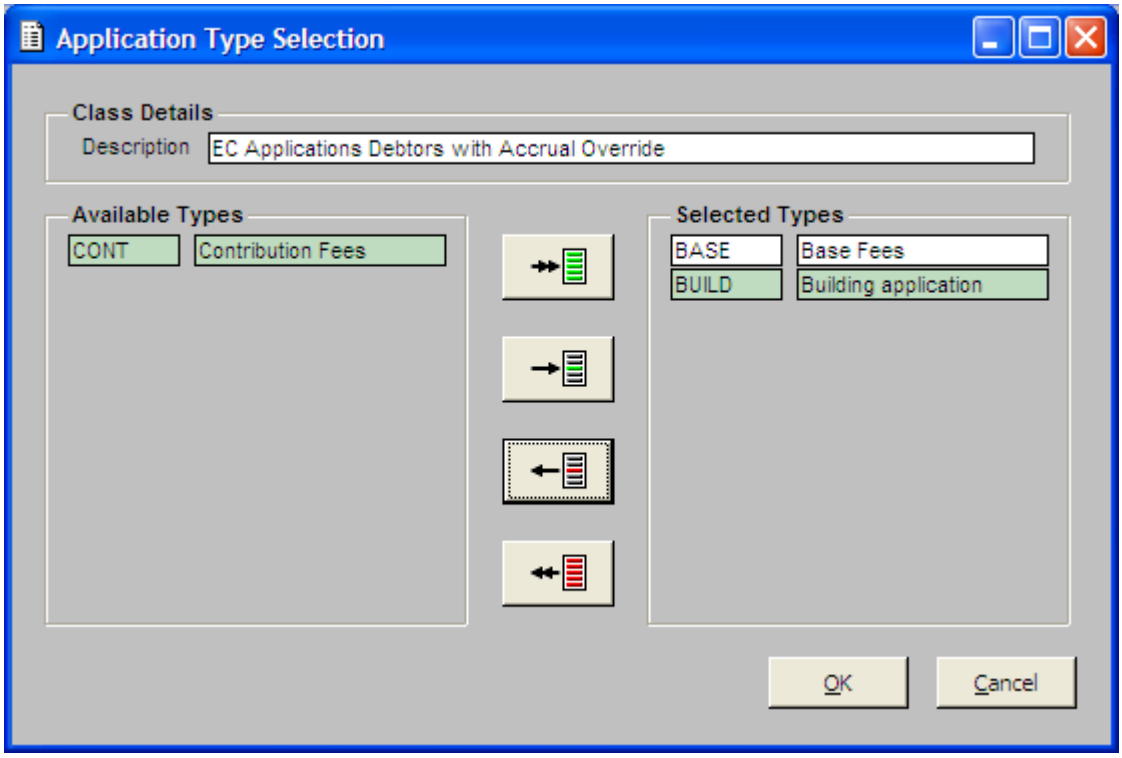
This is the description of the Class Code that may be selected, use the detail button to further select the Application Type.

Select All

The Select All option when flagged On will select all Classes. Flagging the field OFF will deselect all the Classes.

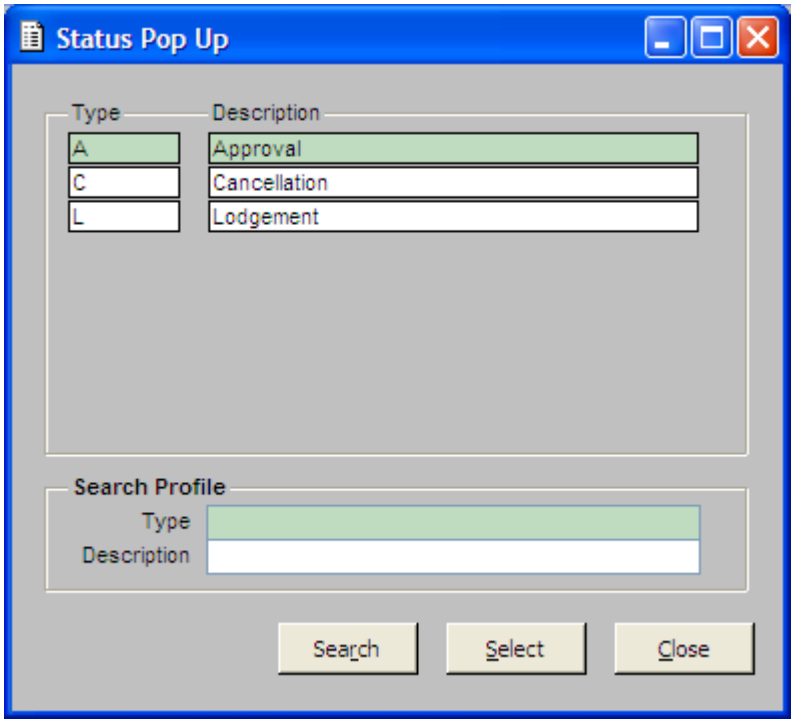
Application Type Selection

To select a specific type from the class or classes use the detail out button and the screen displayed below will allow for specific selection.



Assign the classes that are required to have their fees reversed and select OK.

New Status



To amend the status of the application at this time select the Drop Down button to display and select the relevant status that the application will be changes to.

Fees to Process

The above allows the user to select either Fees awaiting to be Transferred to Debtors, Transferred to Debtors or both.

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.

Print Credit Note

Selecting this option will produce a Credit Note that can be issued to the customer.

Print Options

If the Print Credit Note is selected then the user is able to choose between generating the document only or Generating and final printing the document.

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.

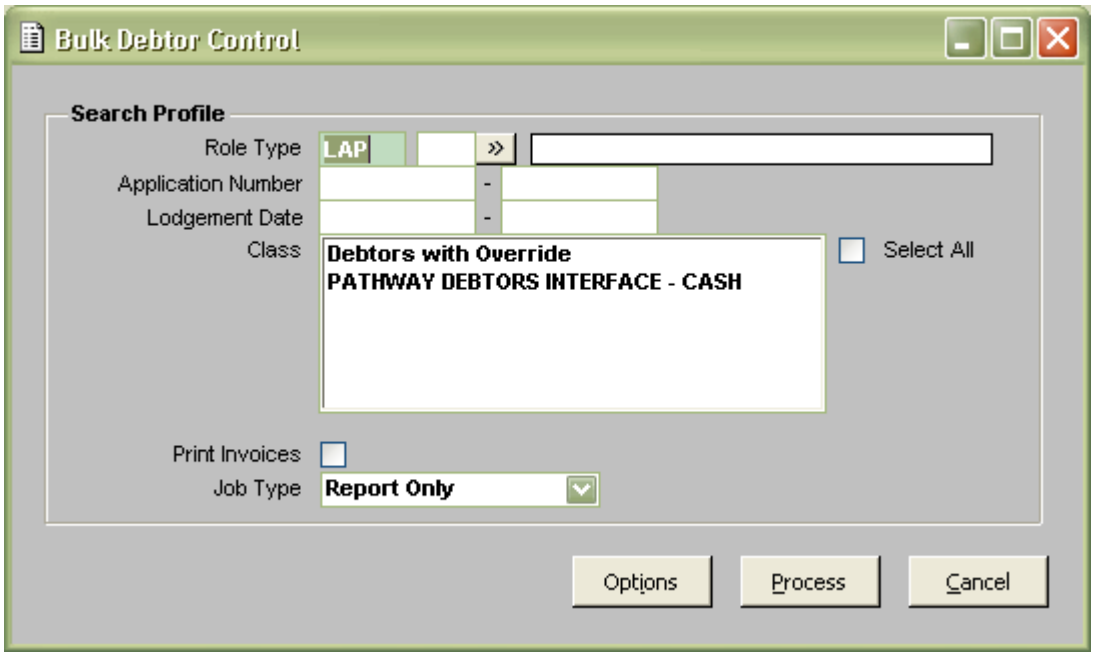
Bulk Debtor Control Form

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 Application Number, Lodgement 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 Applications 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 Applications. The update does not process Credit Notes, Adjustments or Amendments for Fees and therefore is only designed for newly added Applications.

The process works in the following way:-

- It finds the relevant Class and Type of Applications 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 LAP 0 if the field is tabbed over and use the Applicant Role Type. Enter in the required Role Number (if known and different to the Applicant) or use the Pop Up to display a list of Role Types.

Application Number

The Application Number range can be used to filter the process over a particular range of Application Numbers. This field can be left blank or used in conjunction with the Lodgement Date field if required.

Lodgement Date

The Application Lodgement Date range can be used to filter the process over a particular range of Applications by Lodgement Date. This field can be left blank or used in conjunction with the Application 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 Application / 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

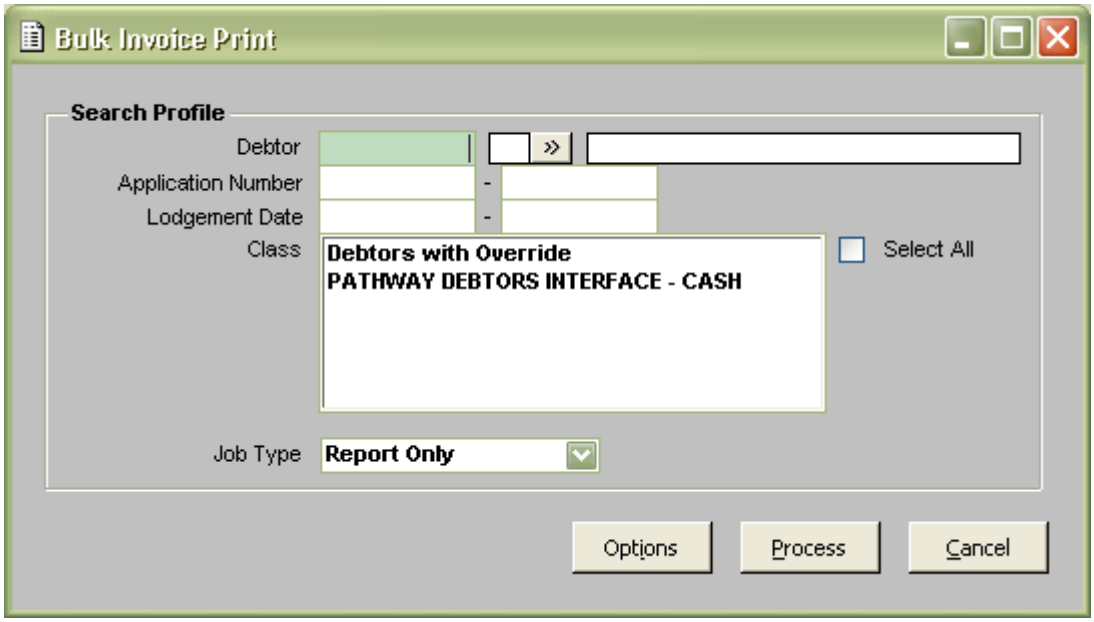
The Bulk Invoices Print option allows for the creation of an Invoice for Applications that fall into the nominated selection criteria. The criteria can from an individual Debtor upto all Applications that within the Class and Application Types nominated.

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 Applications, 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 Application 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.

Application Number

The Application Number range can be used to filter the process over a particular range of Application Numbers. This field can be left blank or used in conjunction with the other fields available.

Lodgement Date

The Application Lodgement Date range can be used to filter the process over a particular range of Applications by Lodgement 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.

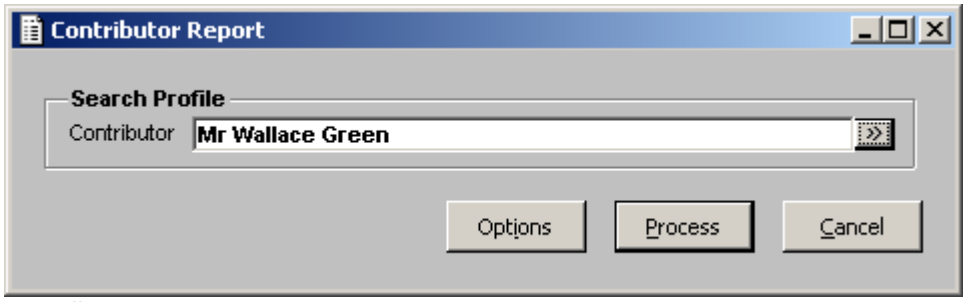
Select All
The Select All option when flagged On will highlight all the Classes listed in the Class area of the display. Flagging the field OFF will deselect all the Classes.

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.

Contributor Report

Contributor Report Form

The Contributor Report is run over all the Application Classes. It produces a report for the nominated Contributor of the Applications that the Contributor is associated with. These reports show details of Non-Cash and Contributions Fees and the values associated to them. The Report may be generated instantly as an interactive report, or may be 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.



Contributor Report Form

Search Profile - Contributor

The Contributor field is used to enter in the Name of the Contributor that the report is to be generated for. The Name can be entered in directly or the Pop Up button used to search for the required Name.

The Contributor field is a mandatory field. The report cannot be run without a Contributor being nominated.

Days Outstanding Report

Days Outstanding Report Control

The Days Outstanding Report extracts the following details:-

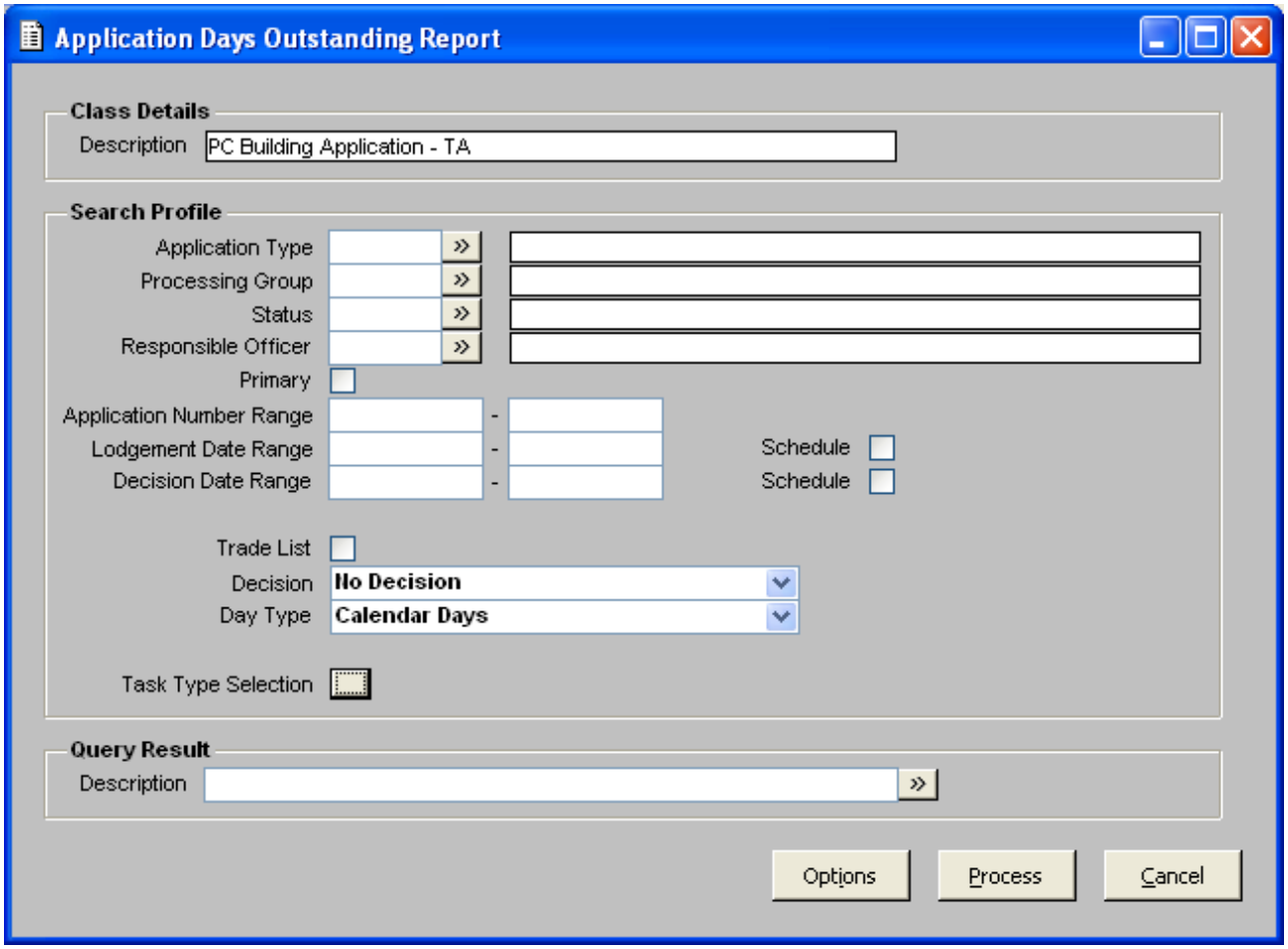
- Application Number
- Location
- Application Description
- Lodged Date
- Status of Application
- Days Outstanding
- Responsible Officer
- Ward

The Report allows Uers to select an Application Number Range, together with Lodgement Date range and Decision types e.g. Approved, All, No Decision etc similar to the Decision Options on the current Register Report.

Users can choose from either Calendar or Working days.

The Report displays Applications in Ward order with a page break between each different Ward. The report is sorted with the Applications Day's Outstanding with the least number displayed first and the highest number of days ascending within each Ward.

NOTE:- Only Applications linked to 'property' locations will have their Ward displayed.



Days Outstanding Report Control Form

Class Detail - Description

This field details the name of the Class currently selected.

Search Profile – Application Type

The Application Type is used to select the particular Application Type required for this Report Selection.

The Application Type Pop Up Button may be used to select a particular Application Type if the Application 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 – Processing Group

The Processing Group is used to select the particular Processing Group required for this Report Selection.

The Processing Group Pop Up Button may be used to select a particular Processing Group if the Processing Group Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Processing Group and Click OK.

Search Profile – Status

The Status Field is used to select the particular Status of Application 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 the required Responsible Officer and Click OK.

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 – Application Number Range

The Application Number Range may be used to select a particular “from” and “to” range of Applications required for Reporting on. Enter a number in the first field and tab to the second field to enter a “to” number.

Search Profile – Lodgement Date Range

The Lodgement Date Range may be used to select a particular “from” and “to” range of Lodgement 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 – Trade List

The Trade List flag, when checked ON, will only extract Applications that are listed as Trade List Applications (on the Building Data Maintenance form). When checked OFF, both Trade List and non-Trade List Applications will be extracted.

Search Profile – Decision

The Decision may be used to select a Decision range for Reporting on. From the Decision drop down select the required option;

- No Decision (default upon entry to form)
- Approvals Only
- Rejections Only
- Decisions Not Approvals or Rejections
- All Decisions
- Ignore Decisions

Search Profile – Day Type

Upon entry to the form the Day Type field defaults to Calendar Days. This can be changed to any of the following options:-

- Calendar Days
- Working Days
- Both

Task Type Selection

Select this button to display a form on which Task selections can be made that will be used to include the Application in the report. This will occur only if those tasks are outstanding (ie not completed), irrespective of the balance of days on the Application. This would be used for example, if you had a Further Information Task incomplete and your Application had 0 days outstanding.

Query Result - Description

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.

Planning Permit Activity Reporting System

For further details click here.

PPARs Extract Control

This batch menu provides for the creation of a file to the appropriate authority (at 2014 this is the DTPLI: Department of Transport, Planning and Local Infrastructure) System is known as PPARS). The process can be run on a monthly basis and the results of the file extracted sent to the PPARS via an automated process.

The batch process allows users to select via Pop Up forms their own specific codes for the relevant reporting requirements.

Where the report is run in Report Mode, applications which are active in the selected period are extracted. Each Application is validated and listed on the Exception Report if any errors, otherwise it will be listed in the Extract Report.

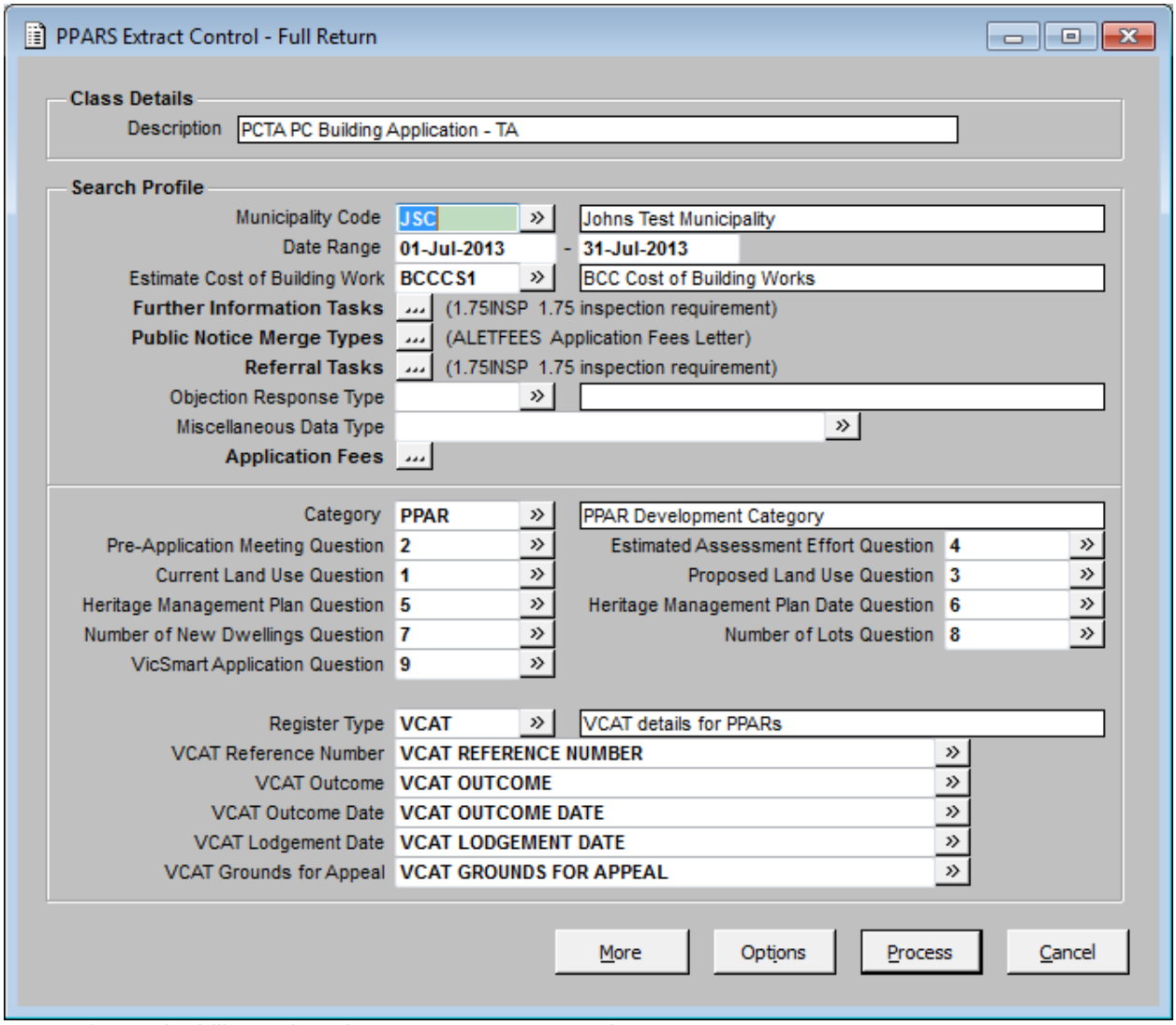
When the report is run in Update and Report mode, in addition to the reports, additional fields are added to the MORE Control form for file locations, Web URL of the PPARS, User Authority and Password which should be supplied by the Planning Permit Activity Reporting System.

The file locations will allow for the directories to be added where the XML file is to be created and the CSV file of Planning Response will be received in the same directory.

Each Application will keep on being extracted to the PPARS until the relevant Approval Decision is found on the Application.

The Batch processing can be set to run automatically at a few days after the start of the month. A running period will be set from 1st day of last month to the last day of last month.

NOTE: This menu is an Authorised Function and therefore only available for use by those with an Authorised Code.



Dept. of Sustainability and Environment Extract Control Form

Class Details - Description

The Class that the PPARS extract process is being run for is displayed in this field.

Municipality Code

This field is used to nominate the relevant Municipality Code for the Council.

Date Range

The Date Range is a From Date / To Date format. This is the time frame that is required when reporting to the PPARS. The PPARS request that the From Date be the 1st day of the Month and the To Date the last day of the Month.

This Date Range is for the reporting period and does not relate to Lodgement Dates, Application Dates or Decision Dates in regard to selection criteria of an Application.

Estimate Cost of Building Work

The Dimension that is used to record the Cost of Works on the Application is to be entered into this field. A pop up is available to allow the selection of the relevant Dimension.

Further Information Task

This button will take you out to the PPARs Extract Control – Further Information Tasks form. The form will allow you to nominate those Tasks that are 'Further Information' Tasks. This option is bolded once Tasks have been assigned.

Public Notice Merge Type

This button will take you out to the PPARs Extract Control – Public Notice Merge Types. The form will allow you to nominate those Merge Types that are Public Notices. This option is bolded once Merge types have been assigned.

Referral Task

This button will take you out to the PPARs Extract Control – Referral Tasks form. The form will allow you to nominate those Tasks that are 'Referral Tasks'. This option is bolded once Tasks have been assigned.

Objection Response Type

The Objection Response Type that is to be used for the process is to be entered into this field. A pop up is available to allow the selection of the relevant Objection Response Type Code.

Amended Applications

The Amended Applications field controls how the process determines whether it is processing an amended application or not.

Where this field is left OFF the process will assume that the Amend Application at Lodgement process is used and that the Application with have \A or \B etc. Where the Application has these then it will be assumed to be an amended Application,.if none then the Application will be set to New Application.

Where this field is flagged ON the process will look for Amendments on the Application itself via the Amendments Maintenance Option. Where an Amendment record exists regardless of what it has been added for the process assumes the Application is an Amended Application in the PPARS process.

Application Fees

The Application Fees option displays a selection form to allow the selection of the Fees to be reported to PPARS. This option is bolded once fees have been assigned.

Category

The Major Development Category that has been used to setup the information for PPARS is to be entered into this field. A pop up is available to allow the selection of the relevant Major Development Category.

Pre-Application Meeting

The Question that records the information as to whether a Pre-Application Meeting has occurred is required to be entered into this field. The pop up displays the Questions that have been setup within the Major Development Category nominated in the Category field.

Estimated Assessment Effort Question

The Question that records the information as to the 'Estimated Assessment Effort' is required to be entered into this field. The pop up displays the Questions that have been setup within the Major Development Category nominated in the Category field.

Current Land Use Question

The Question that records the information as to 'Current Land Use' is required to be entered into this field. The pop up displays the Questions that have been setup within the Major Development Category nominated in the Category field.

Proposed Land Use Question

The Question that records the information as to 'Proposed Land Use' is required to be entered into this field. The pop up displays the Questions that have been setup within the Major Development Category nominated in the Category field.

Register Type

The Register that has been used to store the VCAT information for Applications is to be entered into this field. The pop up displays the available Registers.

VCAT Reference Number

The Register field used to store the VCAT Reference Number is to be entered into this field. The pop up can be used to display a list of fields for the Register nominated in the Register Type field.

VCAT Outcome

The Register field used to store the VCAT Outcome is to be entered into this field. The pop up can be used to display a list of fields for the Register nominated in the Register Type field.

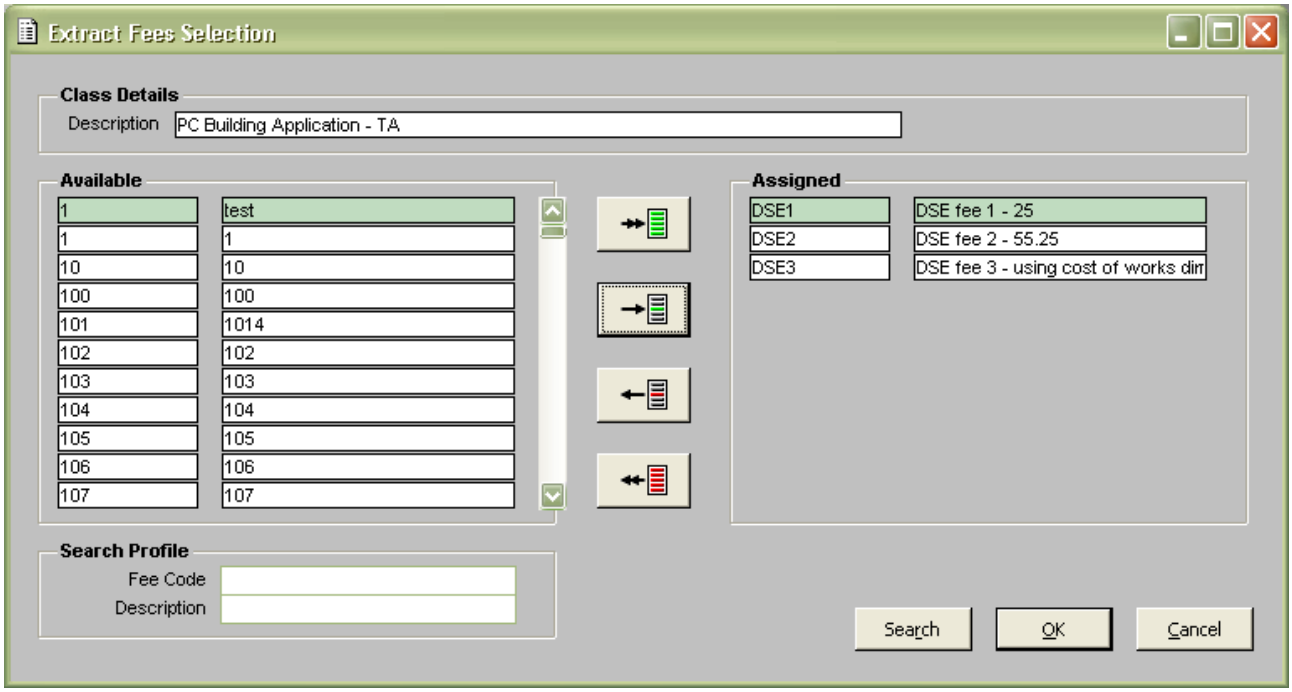
VCAT Outcome Date
The Register field used to store the VCAT Outcome Date is to be entered into this field. The pop up can be used to display a list of fields for the Register nominated in the Register Type field.

More
The More Option displays the PPARS Extract Control form where File locations, Web URL, User Authority and Password information can be set.

Extract Fees Selection Form

The Extract Fees Selection form is displayed when the Application Fees option has been selected. It shows the fees available for the Application Class being used for the PPARS Extract.

Select the required Fees to be included in the PPARS Extract information.



Extract Fees Selection Form

Class Details - Description
The selected Application Class that will be used for the PPARS Extract is displayed in this field.

Available
The Available Fees for the selected Application Class and shown in this area. Use the Assign option to move the required Fees to the Assigned Area.

Assigned
Fees that have been Assigned will display in this area. These are the Fees that will be included in the Fee amount in the extract file. Use the De-Assign option to move a Fee from the Assigned area back to the Available area.

Search Profile – Fee Code
If the list of Fees is large the Search Profile Fee Code field can be used to refine the list. Enter in the required Fee Code, or part thereof, and initiate the Search. The Available area will be refreshed showing those Fees that match the entered search criteria.

Search Profile – Description
If the list of Fees is large the Search Profile Description field can be used to refine the list. Enter in the required Fee Description, or part thereof, and initiate the Search. The Available area will be refreshed showing those Fees that match the entered search criteria.

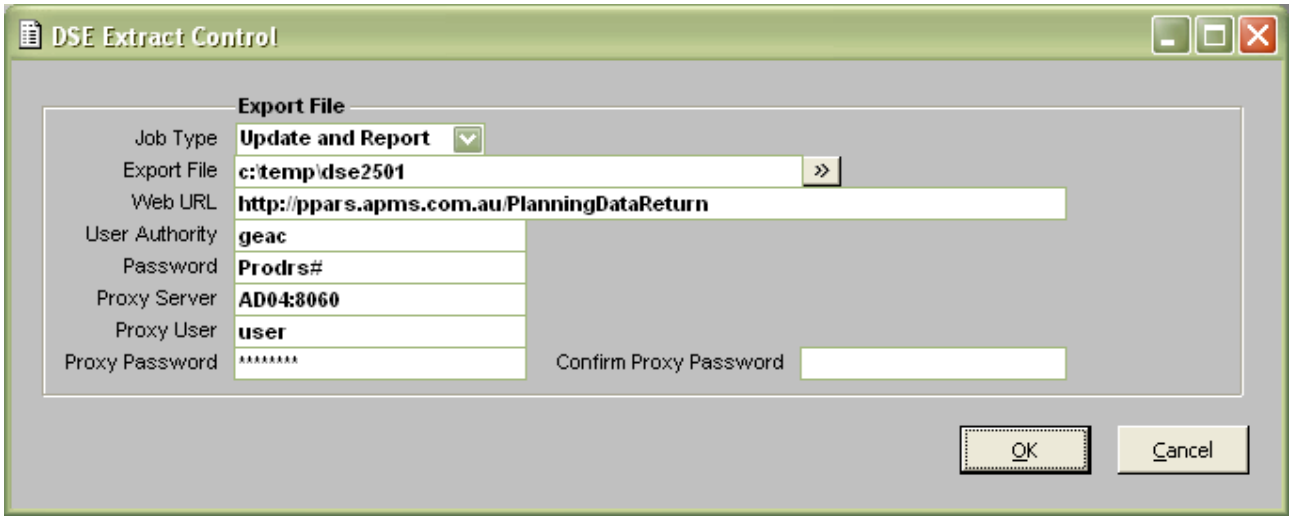
PPARS Extract Control

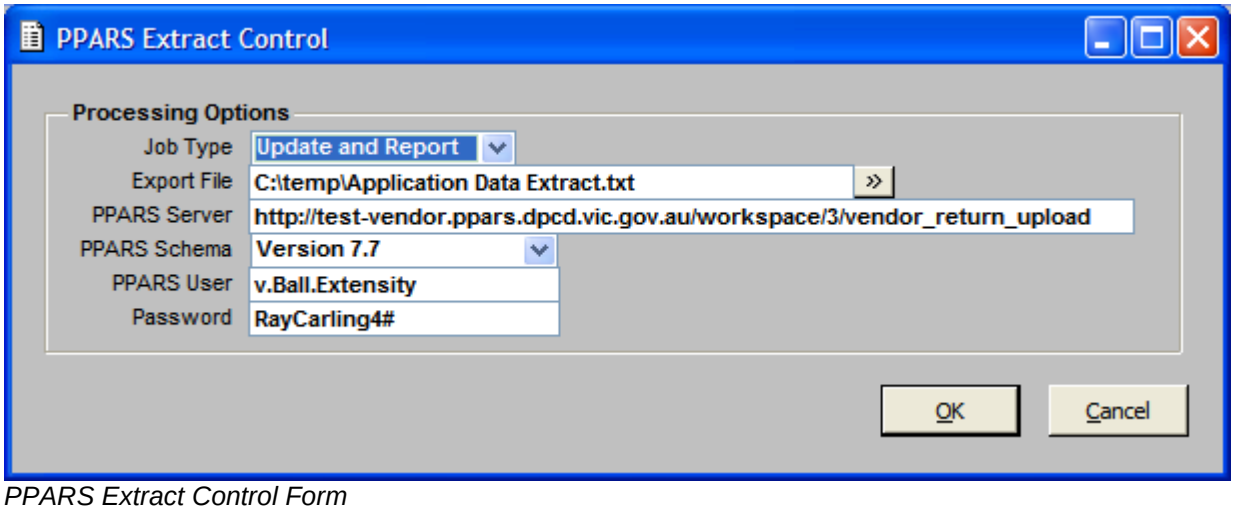
The PPARS Extract Control form is displayed when the More Option is selected from the PPARs Extract Control form.

This form allows for the entry of the Export File location, Web URL, User Authority and Password information.

Note that when the Job Type is set to Report Only then the other fields on the display are dimmed

The proxy server connection details that were previously specified on the PPARS Extract Control form are now definable in the Integration System Parameters for global use throughout Pathway. Consequently, they have been removed from the PPARS Extract Control form:-





PPARS Extract Control Form

If the Internet connection used to communicate with the PPARS web site is via a proxy server, the proxy server connection details should be set as described below.

Setting up the Proxy Server Connection Details

The proxy server connection details are held in the Integration System Parameters, and are used throughout Pathway where required. The proxy server connection details are maintained via the System Administration ► Integration ► System Parameter Maintenance option from the Pathway menu (using either the smart client or the thick client):-

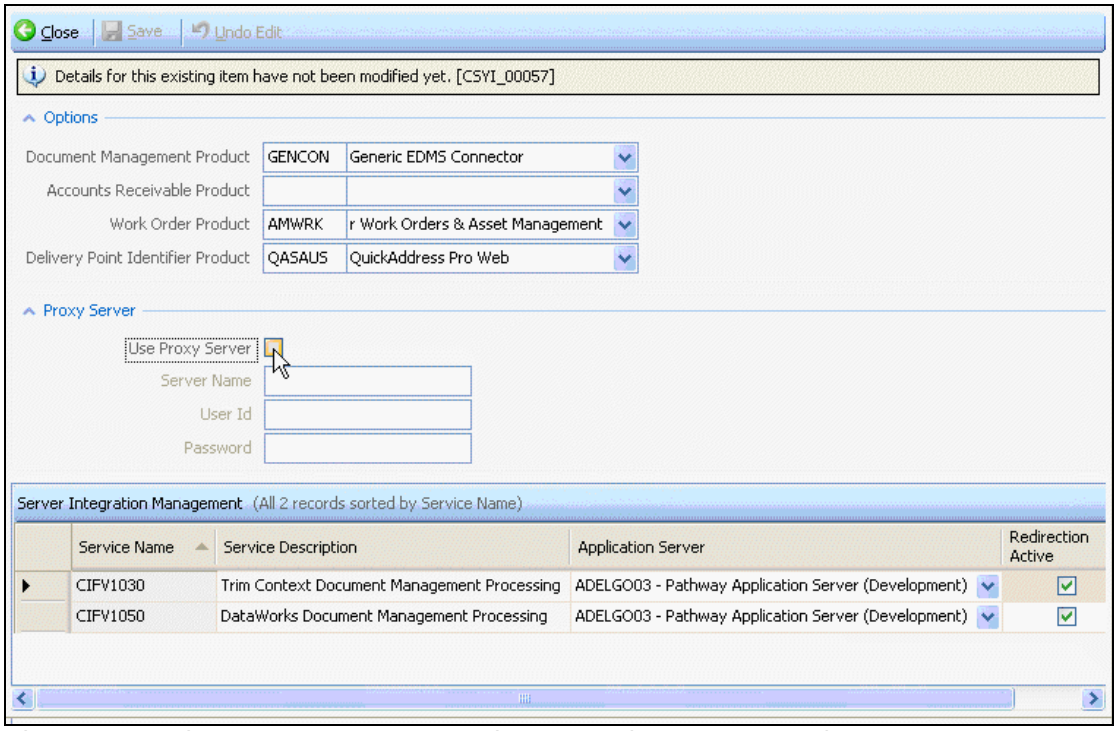


Fig 2 – Integration System Parameter Maintenance (Form CIFG9000)

To define the proxy server connection details and indicate that a proxy server is in use, check the *Use Proxy Server* checkbox on. The *Server Name*, *User Id* and *Password* fields will then become enabled.

The *Server Name*, *User Id* and *Password* fields are all mandatory when *Use Proxy Server* is checked on.

When *Password* is entered or modified, an additional field *Confirm Password* will appear:-

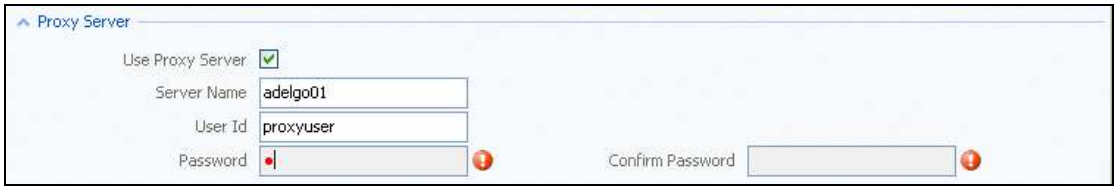


Fig 3 – Proxy Server Password Confirmation

Continue typing the password, then retype the same value in the *Confirm Password* field. *Password* and *Confirm Password* must be identical.

Press the Save button on the form toolstrip to store the proxy server connection details in the database.

Pathway will then use the specified proxy server connection details when sending PPARS reports.

To stop using the proxy server connection details, simply check the *Use Proxy Server* checkbox off. Note that this will suppress the proxy server connection details for all Pathway functions that use them, not just PPARS.

Job Type

The Job Type fields determines how the process will run. When this field is set to Report Only then the other fields on the display are dimmed.

Processing will only produce a Report and no Files etc will be produced.

When set to Update and Report the remaining fields become available as they are required for the processing to occur correctly.

Processing will produce a Report, an XML file in the nominated Export File field, and auto send to the nominated Web URL with the nominated User Authority and Password information.

Export File
The Export File field allows for the file location to be entered. This is where the XML file is created and the CSV file of Planning Response will be received.

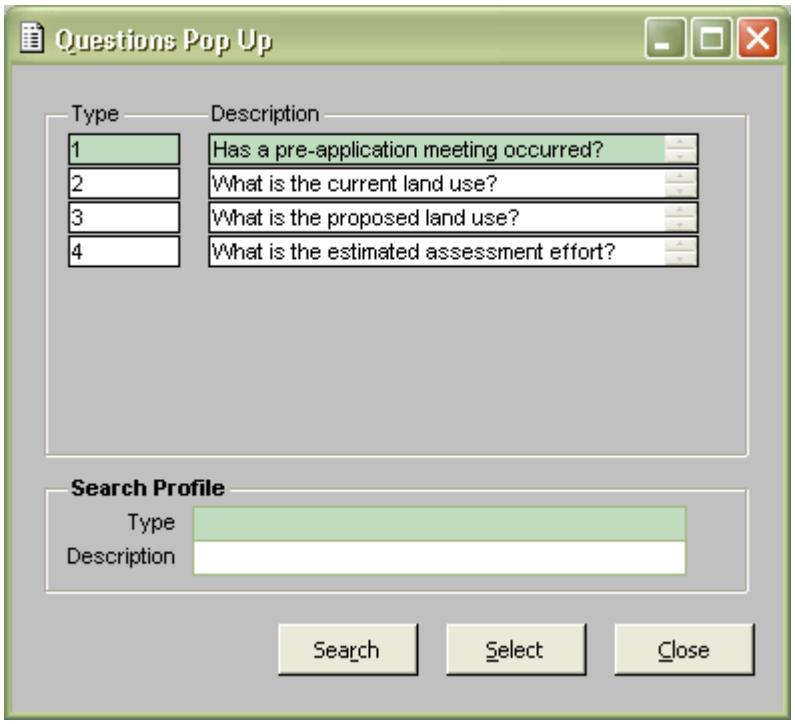
Web URL
The Web URL is the Web URL for the PPARS.

User Authority
The User Authority is the information that has been provided to Council from the PPARS to be used for this processing.

Password
The Password is the information that has been provided to Council from the PPARS to be used for this processing.

Questions Pop Up

The Questions Pop Up displays a list of the Question for the Major Development Category.



Questions Pop Up Form

Type
The Type field is the Question Number.

Description
The Description is the actual Question itself.

Search Profile - Type
If the list of Questions displayed needs to be refined then the Search Profile can be used. Enter in the required information or part thereof and initiate the search. The list of Questions will be refreshed showing only those Questions that match the entered search criteria.

Search Profile - Description

If the list of Questions displayed needs to be refined then the Search Profile can be used. Enter in the required information or part thereof and initiate the search. The list of Questions will be refreshed showing only those Questions that match the entered search criteria.

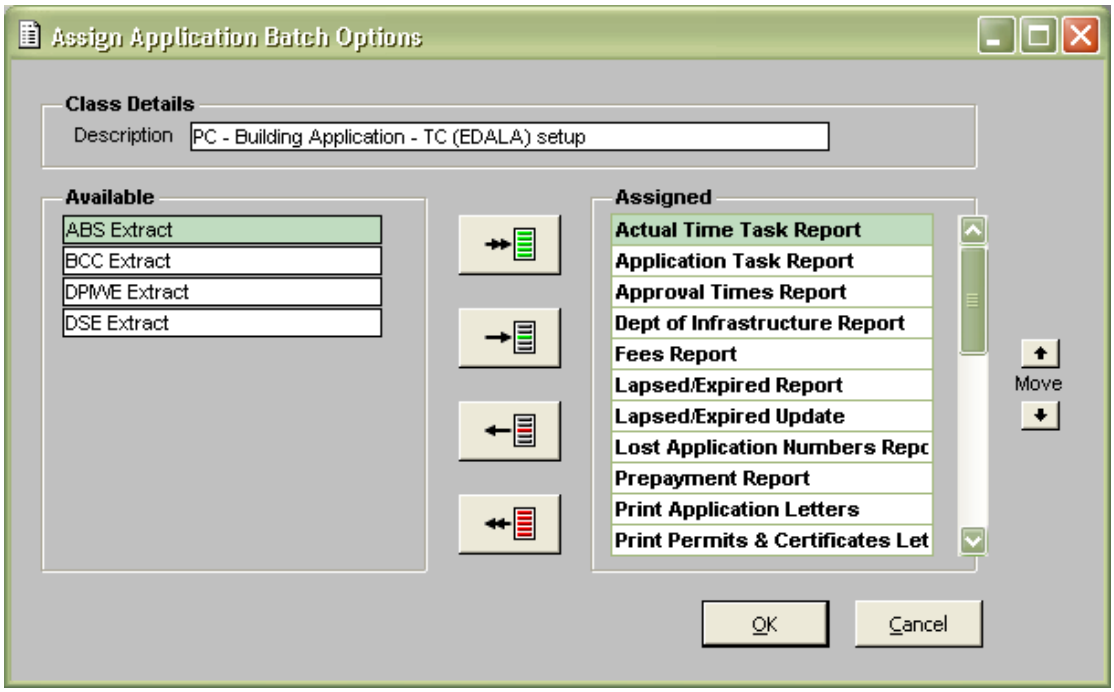
PPARS Setup

The following information is how the Data is to be setup for the information to be extracted for the PPARS.

Note that this is an *** AUTHORISED FUNCTION ***.

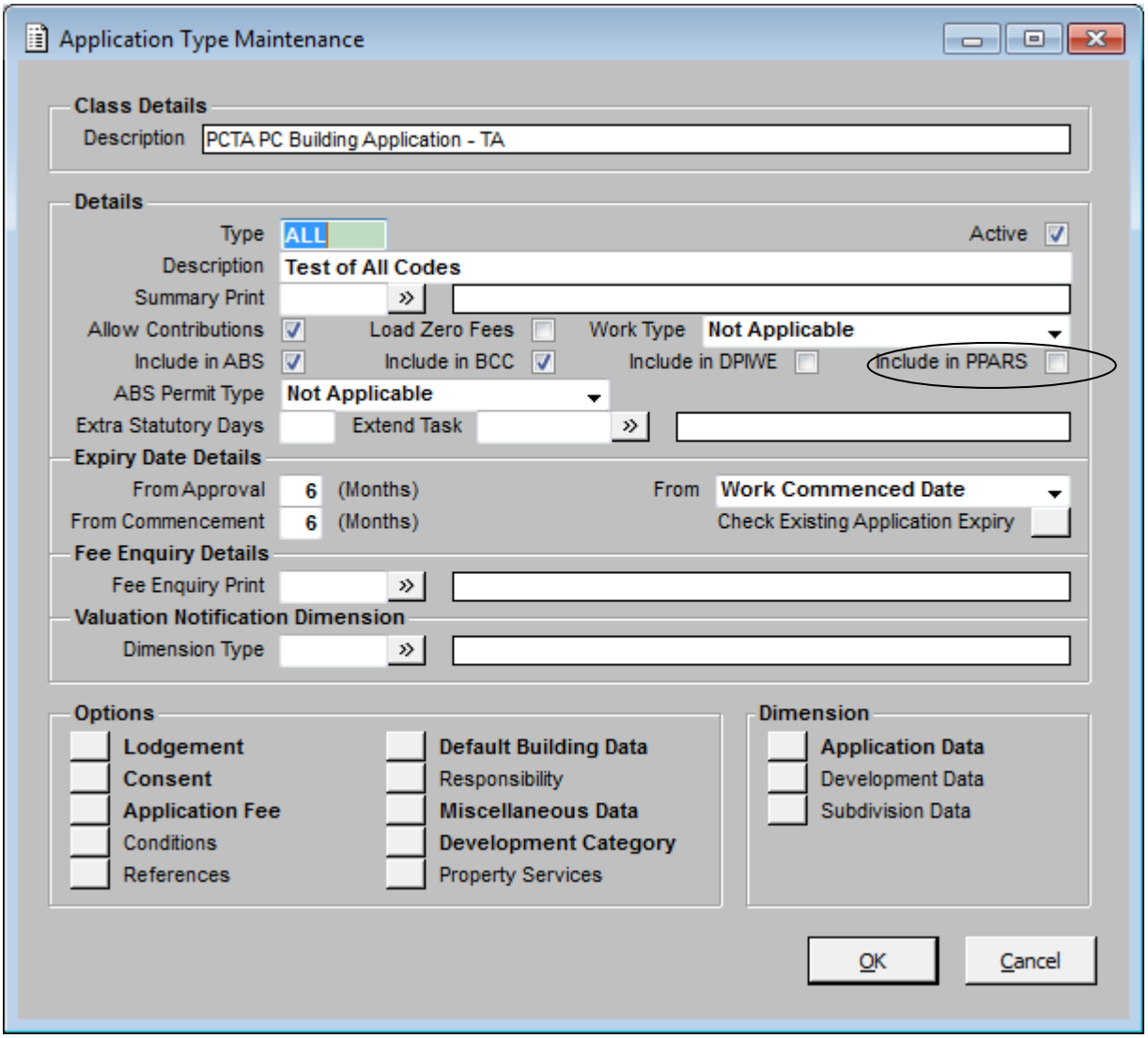
PARAMETERS
As with other batch processes to Government Authorities, a new flag of "Include in PPARS" is required to be set up at the Application Type Parameter level and the Application Decision Parameter level.

Application Class Maintenance
PPARS Extract is controlled by specific Class. To achieve this, the PPARS Extract Batch Option should be set up for the particular Class and for particular Users.



Assign Application Batch Options

Application Type Parameters
A flag has been added to the Application Type Maintenance form. This flag indicates that this particular Application Type is one applicable to be sent to the PPARS. There may be application types that are created specifically for internal uses and therefore are not required to be reported to the PPARS. The default is "OFF" and sites need to check this ON to indicate that this Application Type is required to be sent to the PPARS.



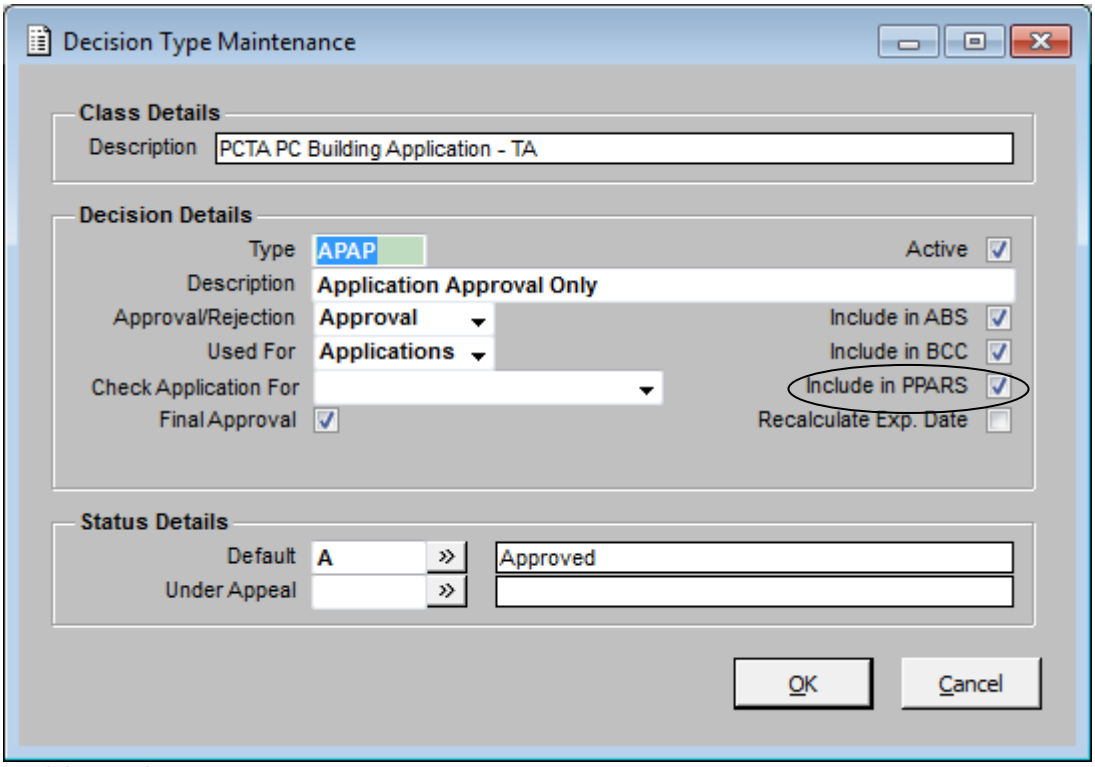
Application Type Maintenance

Application Decisions

A flag of “Include in PPARS” indicates that this particular Decision is one applicable to determine an Outcome Date for the Application.

The PPARS requires an Application to be included in the extract file for the first time in the month of Lodgement and again each month until the final outcome (decision).

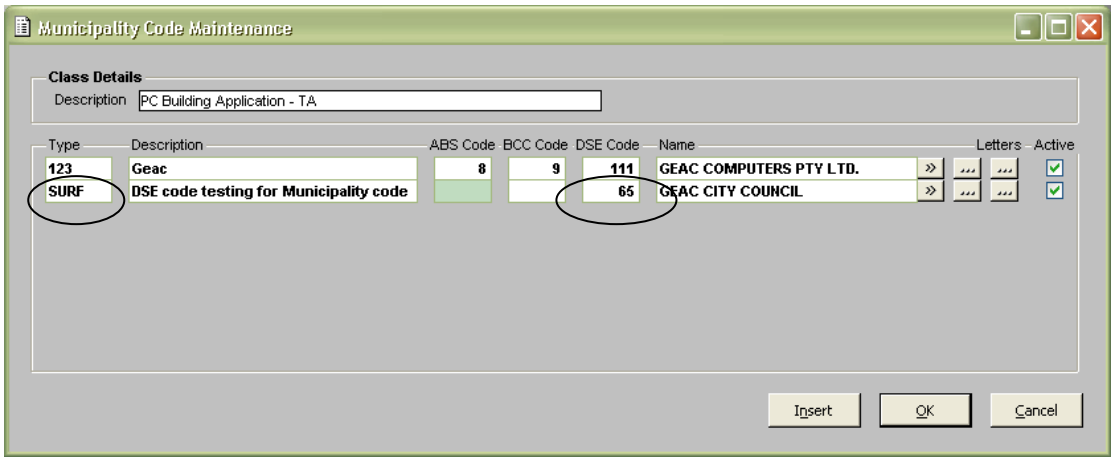
When a decision is appealed, this application is still extracted until a final decision without appeal is added.



Decision Maintenance

Victorian Planning Scheme Code

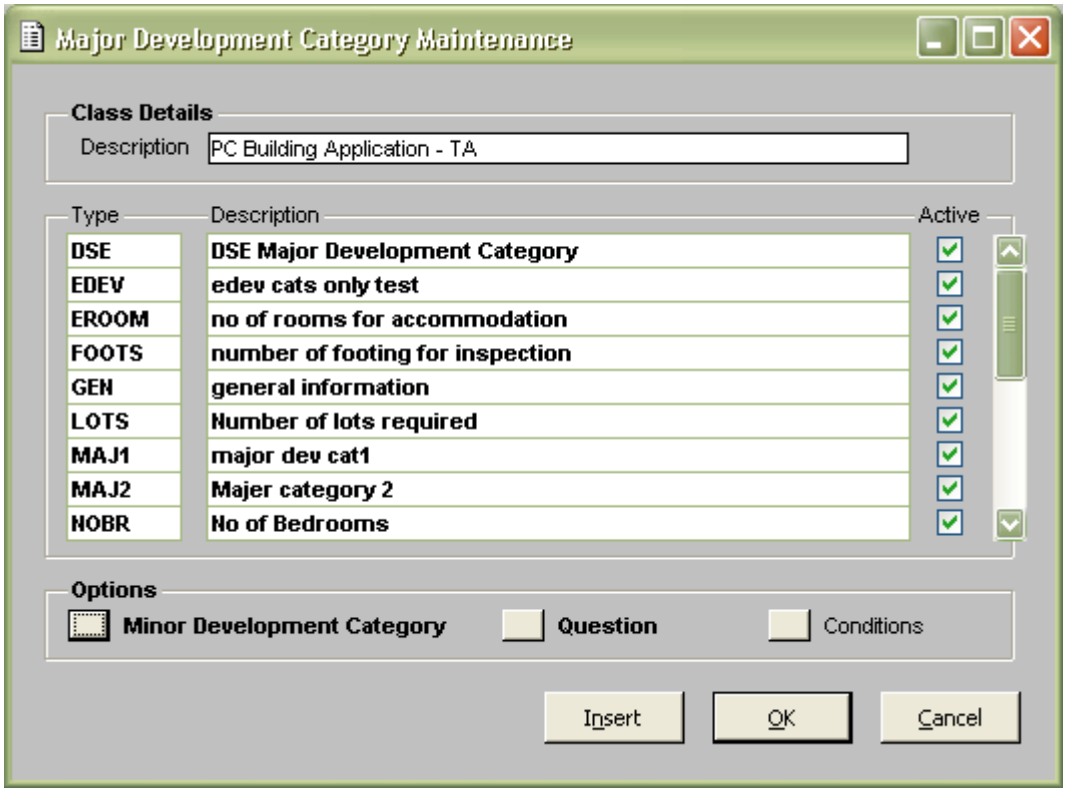
Each council within Victoria is allotted a Planning Scheme Code of 4 characters. This code should be added as a Municipality Code within the Class Parameters along with the PPARS Code which is used as the "Responsible Authority" in the Planning Data Return. A popup is provided on the Batch Control form for users to select the relevant Municipality Code for this purpose. This Code converts when exported for PPARS into lower case format to cater for PPARS formats.



Municipality Code Maintenance

Major Development Categories

A special Category should be set up for Planning Permit Activity Reporting System.



Major Development Category Maintenance

A popup is provided on the Batch Control form for users to select the relevant Major Development Category Code required for PPARS Extract.

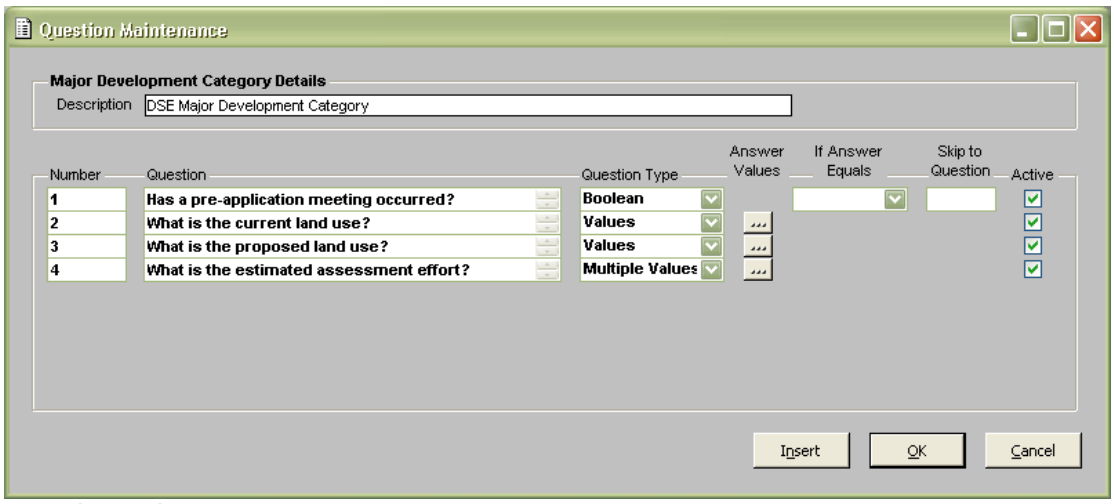
For the above Major Category, the Minor Development Categories need to be set up to hold the PPARS specific codes required to be used.

Click on “Minor Development Category” and create the 24 Minor Categories which are used as the Application Categories for PPARS Planning Data Return.

The Appropriate values are:

0 Not Yet Determined
1 Change or extension of use
2 Alterations to a building structure or dwelling
3 Extension to an existing dwelling or structure associated with a dwelling
4 Extension to existing building or structure (other than dwelling)
5 One new building
6 One new dwelling
7 More than one new dwelling but less than 10
8 More than 10 new dwellings
9 Other buildings and works (including septic tanks, dams, earthworks)
10 Demolition
11 Native Vegetation Removal
12 Other Vegetation Removal
13 Consolidation
14 Subdivision land (1 – 9 lots)
15 Subdivision land (10 or more lots)
16 Subdivision buildings
17 Subdivision – Change to easement and or restrictions
18 Subdivision – Removal of covenant
19 Liquor Licence
20 Waiving of parking requirement
21 Signage
22 Telecommunications Facility
23 Other

Back on the Major Category Form, Click on the Question Button and create the questions that are used as "Estimated Assessment Effort"; "Pre-Application Meeting"; "Current Land Use" and 'Proposed Land Use" fields for PPARS Planning Data Return.



Question Maintenance

Estimated Assessment Effort
This field is an assessment by a planning officer for the Responsible Authority of a number of Responsible Authority days that is required to process an application for a planning permit.

There is a popup on the Batch Control form to select the question to use to extract this field.

The field requirements are:

0 Not Yet Determined
1 Simple - Estimated less than 1 person day effort required to process the application
2 Average - Estimated 2 – 5 person days' effort to process the application
3 Complex - Estimated more than 5 person day's effort required to process the application

Pre-Application Meeting
This field is an indication by the applicant on the Application for Planning Permit form of whether or not a pre-application meeting occurred between the applicant and a Responsible Authority officer.

There is a popup on the Batch Control form to select the question to use to extract this field.

The appropriate responses are:

1 No or not indicated on the form by the applicant
2 Yes

Current Land Use
This is the current activity undertaken on the land that is the subject of the application for a planning permit.

There is a popup on the Batch Control form to select the question to use to extract this field.

The required fields are:

0 Not Yet Determined
1 Agriculture
2 Food and Drink Premise
3 Industry and warehouse
4 Leisure and recreation
5 Office
6 Place of Assembly

7 Residence
8 Retail
9 Vacant
10 Other land use

Proposed Land Use
This is the purpose for which the land is proposed to be used should the planning permit be granted.

There is a popup on the Batch Control form to select the question to use to extract this field.

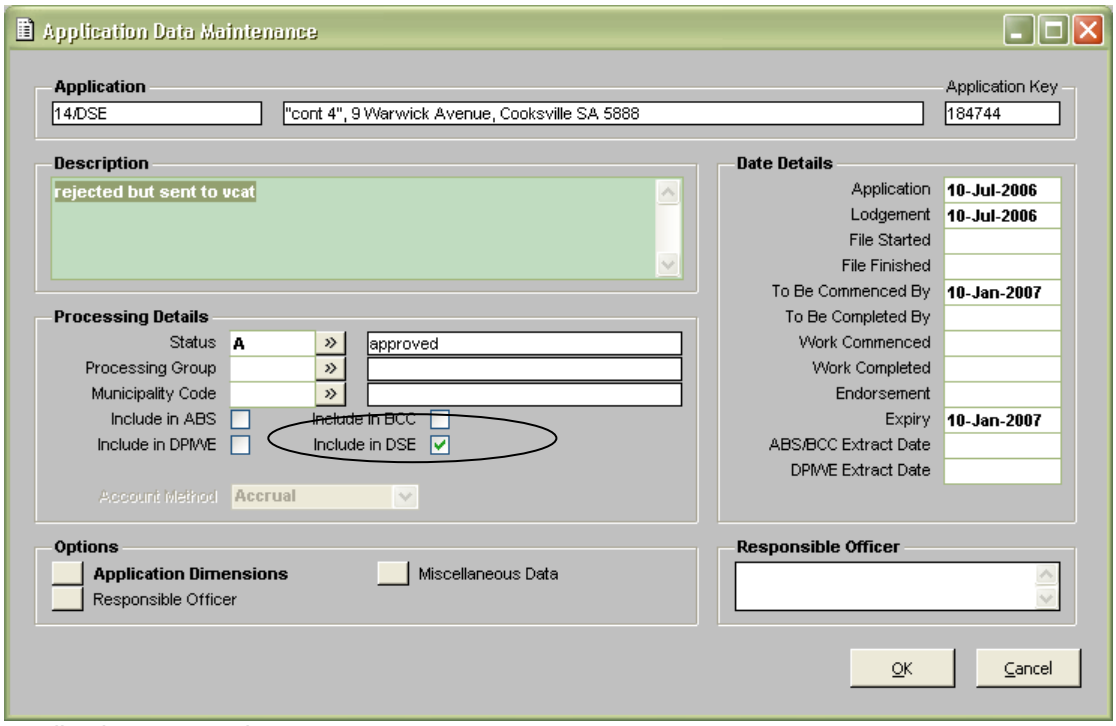
The required fields are:

0 Not Yet Determined
1 Agriculture
2 Food and Drink Premise
3 Industry and warehouse
4 Leisure and recreation
5 Office
6 Place of Assembly
7 Residence
8 Retail
9 Vacant
10 Other land use

APPLICATION DETAILS

In order to satisfy the PPARS's requirement, each application should have some additional data:

Application Data Maintenance
During lodgement process, an application is set up with the Allowed PPARS flag as specified for each Application Type, and this can be set "ON" or "OFF" in order to specify a particular application can be extracted or excluded for sending to PPARS.

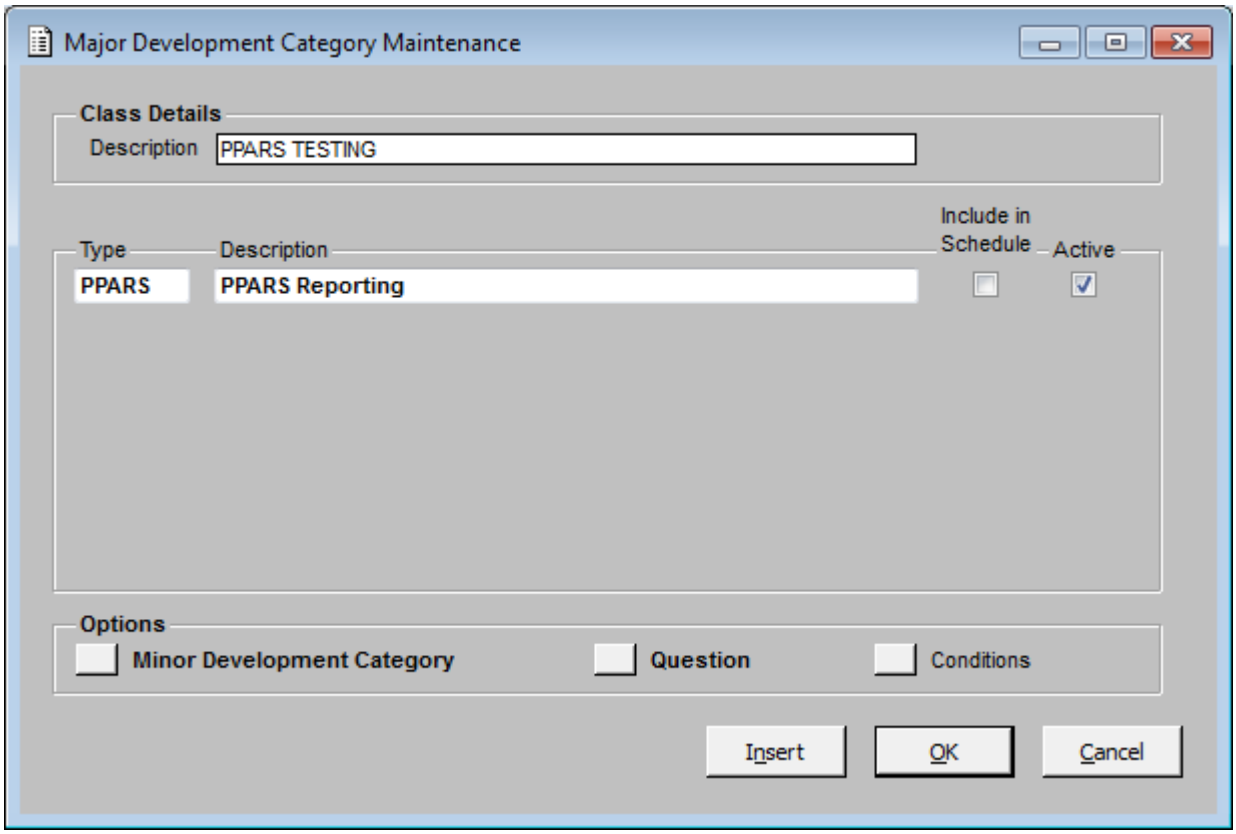


Application Data Maintenance

During the lodgement process, the application is set with the "Allowed PPARS" flag as specified for each Application Type, and that can be set "ON" or "OFF" in order to specify that this application can be extracted or excluded during the PPARS extract process.

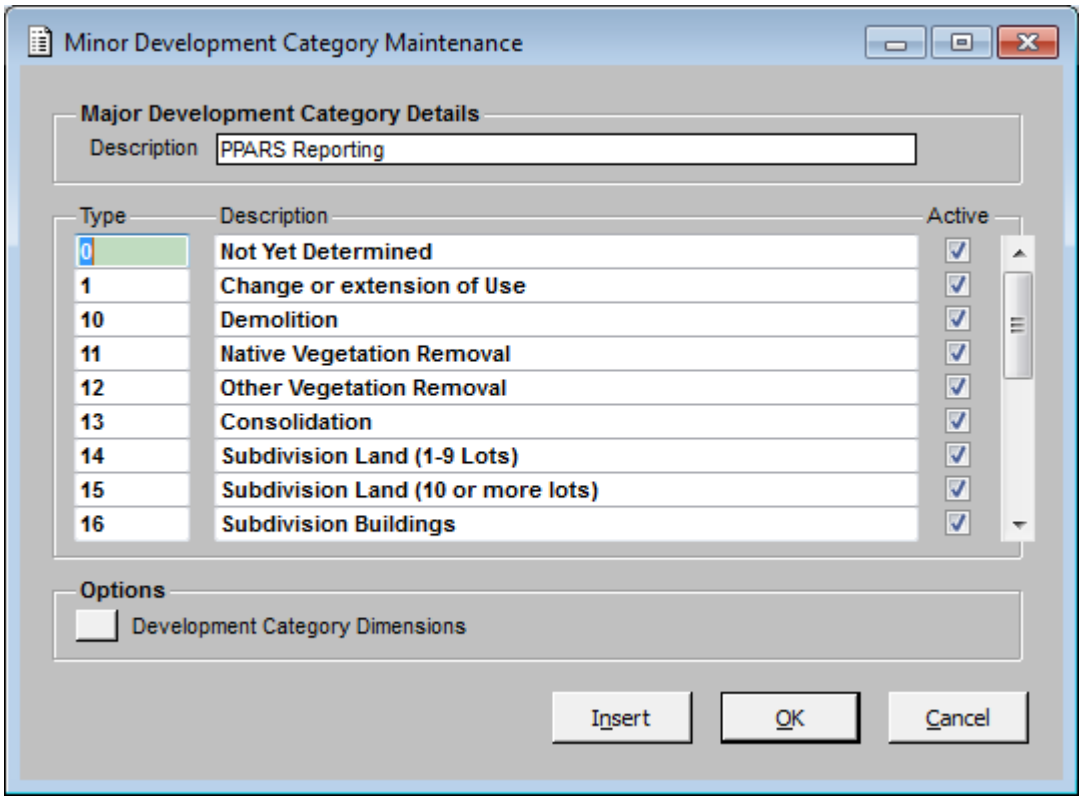
Development Category

The special Category which has been set up in the Major Development Categories should be included in the Development Category Maintenance for applications to be extracted to PPARS.



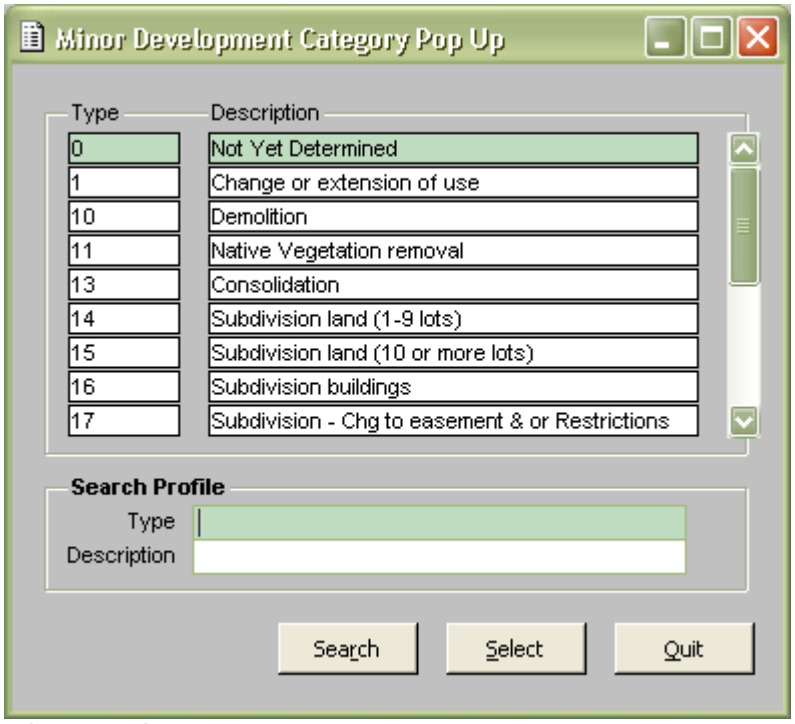
Major Development Categories Maintenance

Click on the Minor Development Category to display the “Minor Development Category Maintenance” form.



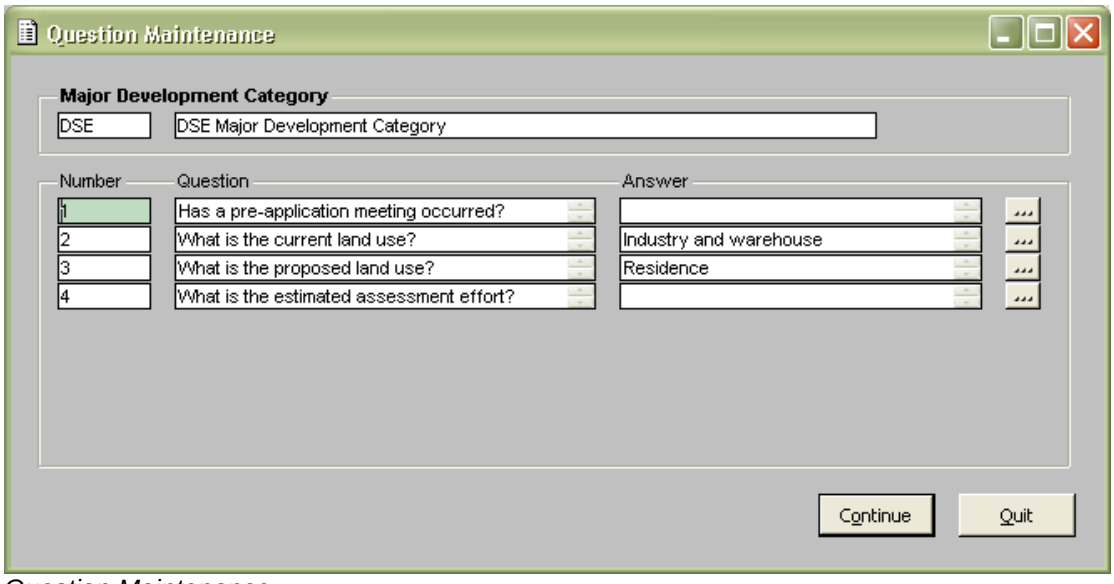
Minor Development Categories Maintenance

Click on the “Insert” Button and select the appropriated Minor Categories which represent the Application Categories for the PPARS Return.



Minor Development Category Pop Up

Once the required Minor Category(s) have been selected, return to the Major Development Category Maintenance and Click on Question to display the “Application Question Maintenance” form. There are 4 mandatory questions that should be answered when the Application Outcome has been done.

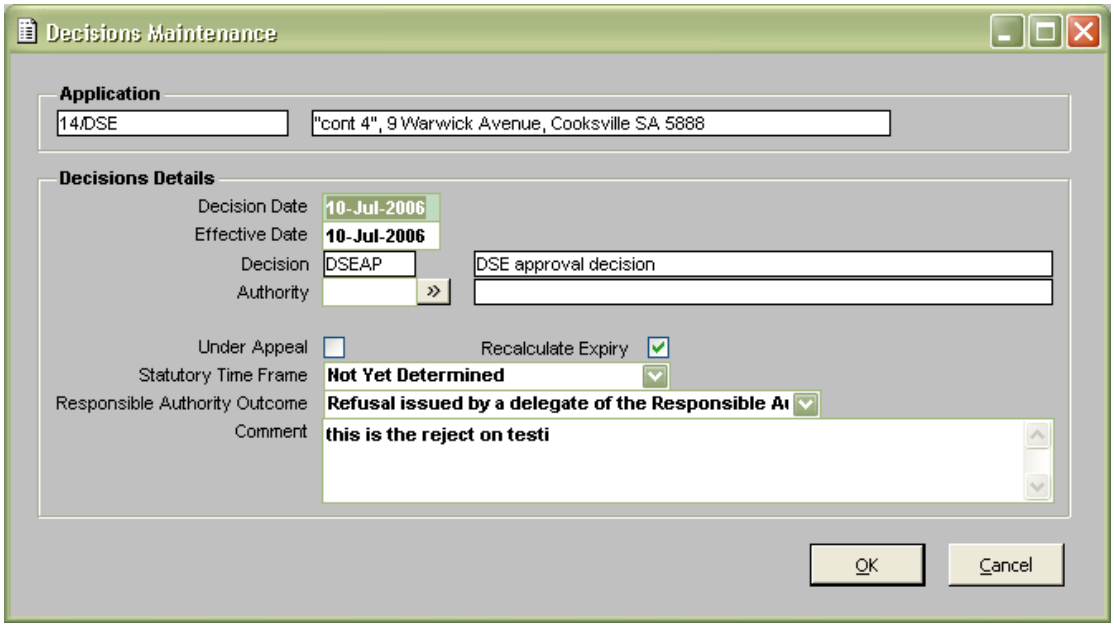


Question Maintenance

APPLICATION OUTCOME

Responsible Authority Outcome

A Decision Type which has the “Include in PPARS” flag set within the parameters will allow the setting of the Responsible Authority Outcome for an application.



Decisions Maintenance

When this type of Decision is selected, 2 more fields of “Statutory Time Frame” and “Responsible Authority Outcome” are displayed. When the extract is run, the “Date of Responsible Authority Outcome” will have a value of the Decision Date, Statutory Time Frame and Responsible Authority Outcome will have the appropriated Codes.

Note that the Statutory Time Frame and the Responsible Authority Outcome have been set up different to the Functional Specification as these are now defined against the Decision and not as a Task or Status.

Fees
This field is the amount charged by the Responsible Authority for the processing of the Application for a Planning Permit.

A selection form is provided from the Batch Control form for the users to select their relevant fee(s) applicable to each site. The system will then do a check on each application for the relevant fees and total the Accepted Value of the nominated fees and place this value into the extract file.

Estimated Cost of Works
This field is the value that the applicant enters onto the Application for the Planning Permit form as the amount that will be spent to undertake works directly associated with subject of the planning permit. This value is entered via a Dimension.

A field and pop-up are provided on the Batch Control form for the site to select their relevant Dimension to indicate the Estimated Cost of Works.

Further Information Requested
This field indicates whether during the processing of an application, the Responsible Authority requested that the applicant provide further Information to clarify or add to information provided in the Application for Planning Permit form.

As this would normally be a Task on the Application, a field and a pop-up form are provided for users to select the relevant task that is assigned to RFI (request for further information). When the extract is run, the system searches the application for this Task, and where it is started takes this as an indication that the request has been made and uses response 2. Where the Task has not been started it uses response 1 and where there is no task, of the type specified it assume it has not been determined. However where the application is completed and there is no Task on the application of that type, the response of 1 or No is assumed.

The appropriate responses are:

0 Not yet determined (not valid for a completed application)

1 No
2 Yes

Public Notice
This field is advice of the existence of any Notification / Advertising documents against Affected Property Records or Notification Letters created against the Application Record, in any form, provided by Responsible Authority.

A pop-up field is provided to allow users to select the Merge type that would normally be used for Notifications or Advertising. The system checks if any documents for the nominated Merge Type have been added via Affected Properties, or if a Merge type of the designated type has been added to the Application. This is taken as an indication that a Public Notice has been issued and uses the Response of 2 – Yes. Where no Merge type is found on the Application or Affected Properties it uses the Response of 1 – No.

The appropriate responses are:

0 Not yet determined
1 No
2 Yes

Referral Issued
This field is whether or not the application was referred to one or more external agencies.

As this would normally be a Task on the Application, the Batch Control Form provides a field and a pop-up form for users to select the relevant task that is assigned to Referrals. When the extract is run, the system search the application for this task, and where it is started, takes this as an indication that the Referral has been made. Where there is no task of that type it uses the Response of 0, where it has been added but not started, it assumes the Response of 0 and if the Task has been added and started we will assume the Response of 2 – Yes. However where the application is completed and there is no Task on the application of that type the response of 1 or No is assumed.

The appropriate responses are:

0 Not yet referred
1 No
2 Yes

Objections
The field is the number of written objections received for an application for a planning permit.

The Batch Control Form provides a field and a pop-up that allow users to select their specific Objection Response code from the Response Maintenance form. Where this is selected, the system then checks the particular application record for that code and adds up the number of responses to give the required answer in the extract. Where there are no Objections of that type “0” is returned.

As this field is a desirable but not required field where users do not use the standard Objectors and Supporters functionality this field may be left blank.

VCAT Outcome
Some Councils use the Register Module to store details about VCAT. So that details can be extracted for PPARS, 3 fields representing “VCAT Reference Number”; VCAT Outcome and VCAT Outcome Date should be set up for the VCAT Register Type.

The VCAT Reference Number is a narrative and VCAT Outcome Date has to be set up as a Date Field. The VCAT Outcome has to set up as followed:

0 No Appeal
1 In Progress
2 Permit Granted
3 Permit Refused
4 Appeal Withdrawn

OTHER FIELDS OF INTEREST IN EXTRACT

Application Identifier
This field is the Application Number.

Application Type
This field indicates whether the permit application is a new application or an application for amendment.

Information for this field is determined by the setting of the Amendment field on the Batch Control form.

Options are:

0 No Data available
1 New Application
2 Amended Application
3 Combined Application

Property Location
This field is the Primary Location of the land subject to the Application for a Planning Permit. The extract will use the contents of the Primary Location on the Location Maintenance form.

Proposed Use or Development
The Application Description is used to populate this field in the Extract.

Date Application Received
The Application Date is extracted into this field in the Extract.

Planning Permit Activity Reporting (PPARS) – PROXY SERVER

The proxy server connection details that were previously specified on the PPARS Extract Control form are now definable in the Integration System Parameters for global use throughout Pathway. Consequently, they have been removed from the PPARS Extract Control form:-

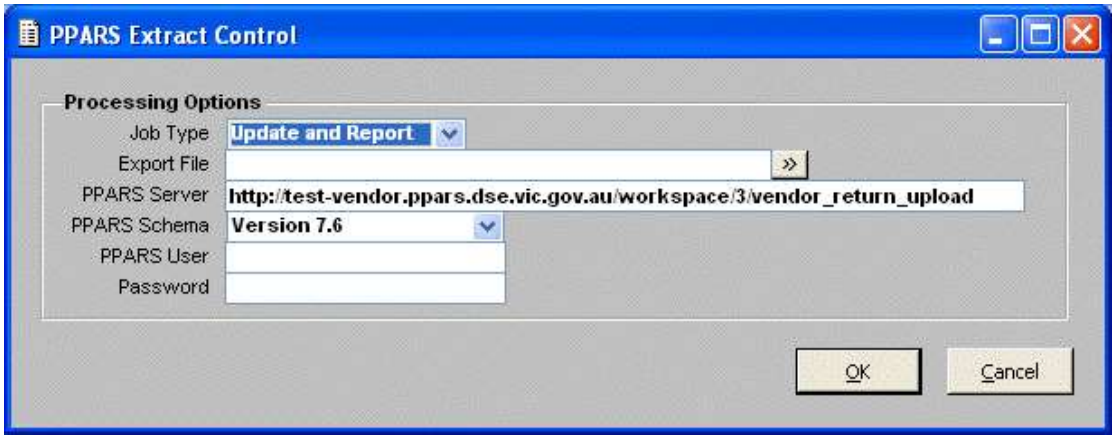


Fig 1 – PPARS Extract Control (Form LAPG7741)

If the Internet connection used to communicate with the PPARS web site is via a proxy server, the proxy server connection details should be set as described below.

Setting up the Proxy Server Connection Details

The proxy server connection details are held in the Integration System Parameters, and are used throughout Pathway where required. The proxy server connection details are maintained via the System Administration ► Integration ► System Parameter Maintenance option from the Pathway menu (using either the smart client or the thick client):-

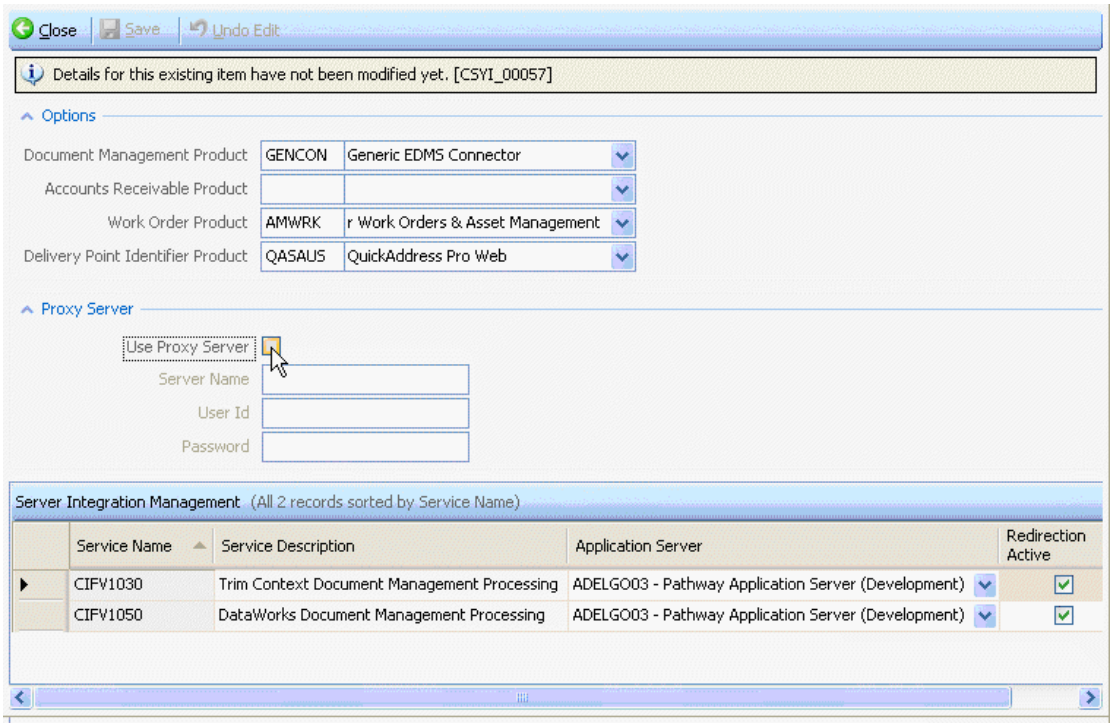


Fig 2 – Integration System Parameter Maintenance (Form CIFG9000)

To define the proxy server connection details and indicate that a proxy server is in use, check the *Use Proxy Server* checkbox on. The *Server Name*, *User Id* and *Password* fields will then become enabled.

The *Server Name*, *User Id* and *Password* fields are all mandatory when *Use Proxy Server* is checked on.

When *Password* is entered or modified, an additional field *Confirm Password* will appear:-

Fig 3 – Proxy Server Password Confirmation

Continue typing the password, then retype the same value in the *Confirm Password* field. *Password* and *Confirm Password* must be identical.

Press the Save button on the form toolstrip to store the proxy server connection details in the database.

Pathway will then use the specified proxy server connection details when sending PPARS reports.

To stop using the proxy server connection details, simply check the *Use Proxy Server* checkbox off. Note that this will suppress the proxy server connection details for all Pathway functions that use them, not just PPARS.

PLANNING PERMIT ACTIVITY REPORTING (PPARS) – PROXY SERVER – Special Instructions

The proxy server connection details that were previously specified on the PPARS Extract Control form are now definable in the Integration System Parameters for global use throughout Pathway. Consequently, they have been removed from the PPARS Extract Control form, so if your site uses a proxy server when submitting PPARS reports the proxy server connection details must be set as follows before running any futher reports:-

Select the System Administration ► Integration ► System Parameter Maintenance option from the Pathway menu (using either the smart client or the thick client):-

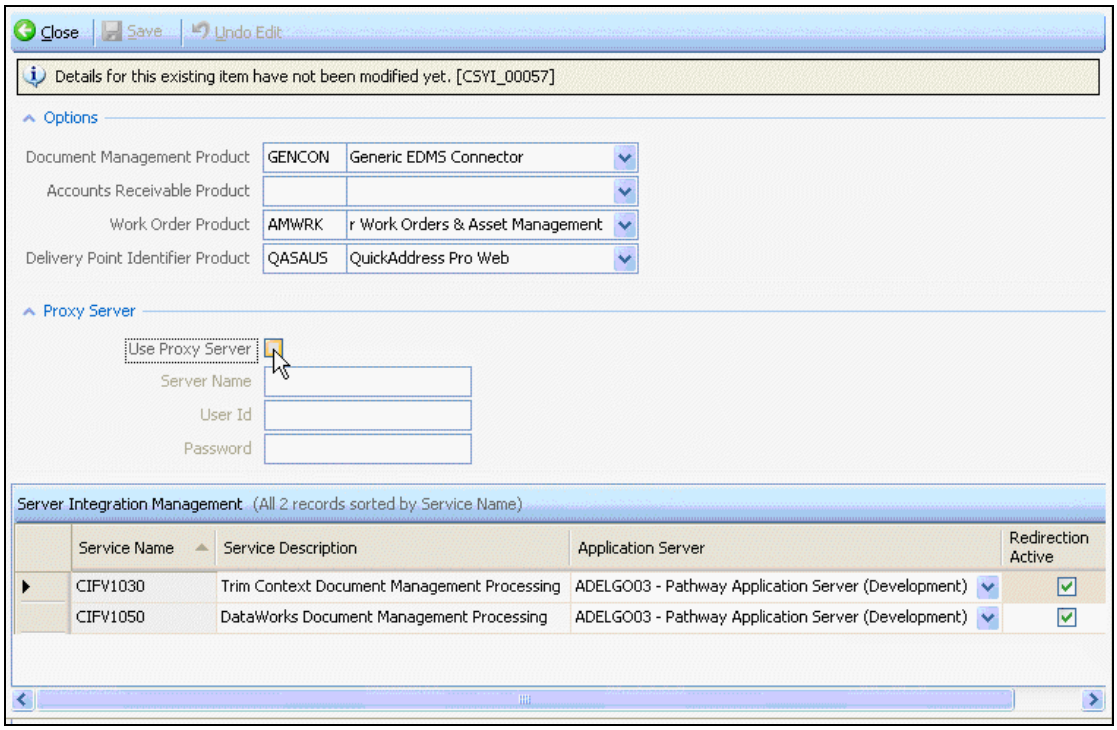


Fig 1 – Integration System Parameter Maintenance (Form CIFG9000)

To define the proxy server connection details and indicate that a proxy server is in use, check the *Use Proxy Server* checkbox on. The *Server Name*, *User Id* and *Password* fields will then become enabled.

The *Server Name*, *User Id* and *Password* fields are all mandatory when *Use Proxy Server* is checked on.

When *Password* is entered or modified, an additional field *Confirm Password* will appear:-

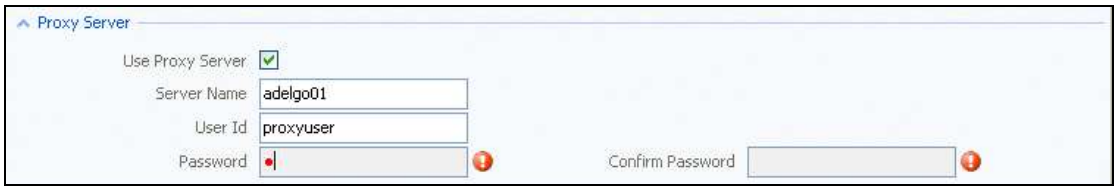


Fig 2 – Proxy Server Password Confirmation

Continue typing the password, then retype the same value in the *Confirm Password* field. *Password* and *Confirm Password* must be identical.

Press the Save button on the form toolstrip to store the proxy server connection details in the database.

Pathway will then use the specified proxy server connection details when sending PPARS reports.

To stop using the proxy server connection details, simply check the *Use Proxy Server* checkbox off. Note that this will suppress the proxy server connection details for all Pathway functions that use them, not just PPARS.

DOI Report

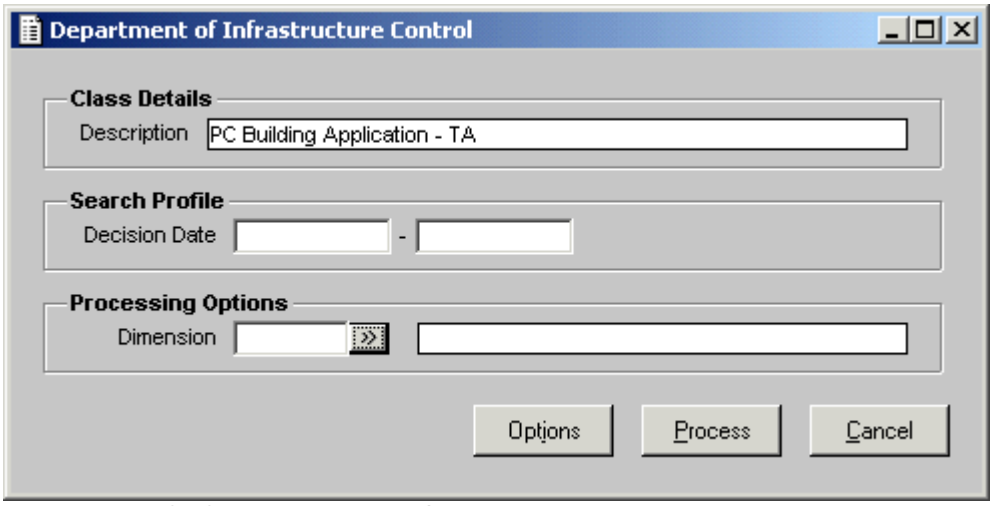
Victorian Sites have a requirement for a report to be created so that it can be run on an as needs basis. This report provides information to the Department of Infrastructure on residential land activities.

The search profile consists of a 'from date' and a 'to date' and uses these dates to match to the Approval Date of an Application. A Dimension is also required to be entered on the Control Form. The Dimension entered is the Dimension from the Application that will be extracted to obtain the Lot Size value.

Department of Infrastructure Control Form

Victorian Sites have a requirement for a report to be created so that it can be run on an as needs basis. This report provides information to the Department of Infrastructure on residential land activies.

The search profile consists of a 'from date' and a 'to date' and uses these dates to match to the Approval Date of an Application. A Dimension is also required to be entered on the Control Form. The Dimension entered is the Dimension from the Application that will be extracted to obtain the Lot Size value.



Department of Infrastructure Control Form

Class Details - Description

This field details the name of the Class currently selected.

Search Profile – Decision Date

The Decision Date fields are used to enter in the date range that is required to be reported on for the Department of Infrastructure. The Decision Date fields are mandatory when running this report and are used to match to the Approval Decision of an Application.

Processing Options - Dimension

The Dimension entered is the Dimension from the Application that is used to extract the information regarding the Lot Size value.

The Dimension field is mandatory when running the Report. The Pop Up button can be used to display a list of valid Dimensions for selection of the required code.

DPIWE Extract

Tasmanian Sites have a requirement for a report to be created so that it can be run on a regular basis. This report provides information to the Department of Primary Industry.

The search profile consists of a Dimension to be selected to use for reporting on the Building Costs.

Query Parameters

Two report formats are required and these should be firstly created via the Query Functions within Pathway. Access is required to Query Parameters – Export/Import Format Maintenance. Using the Entity LRPAP78, create a format in the order as required by (Department of Primary Industry (DPI)) in CSV format.

The first format will be to contain the Header Records only, the second for the Actual Data Maintenance

Table 1 - Record Structure is for provision of a Header Record for the extract for the DPIWE – LRPAP78

Item #	Item Name	Description	LRPAP78 Field
1	HEA	Header Record Type	RECTYPE
2	Control Municipality Code	Municipality Code	MUNICPCODE
3	Building List Number	Building List Number	BLDLISTNUM
4	Record Count	Number of Records	RECORDS

The Header record will contain as shown in the small table above HEA denoting a Header, it will then pick up the Municipality Code from the Municipality Code in the Class System Parameter. The Building List number will be required to be added the first time that the report is run; Infor will then increment this number each time the report is run in update mode. A script will be provided as part of this set up that will be run to populate the relevant table with the first value to be used. The record count will be the number of records in the file.

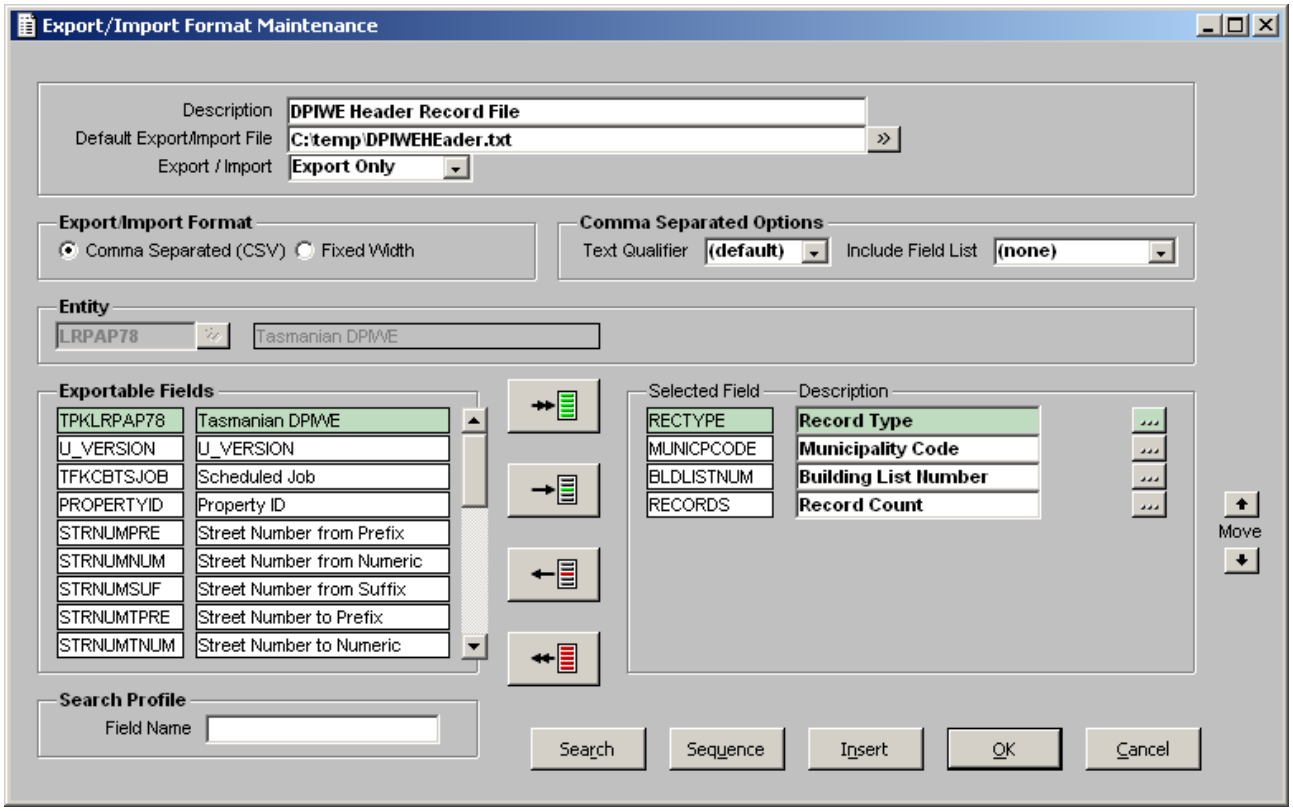


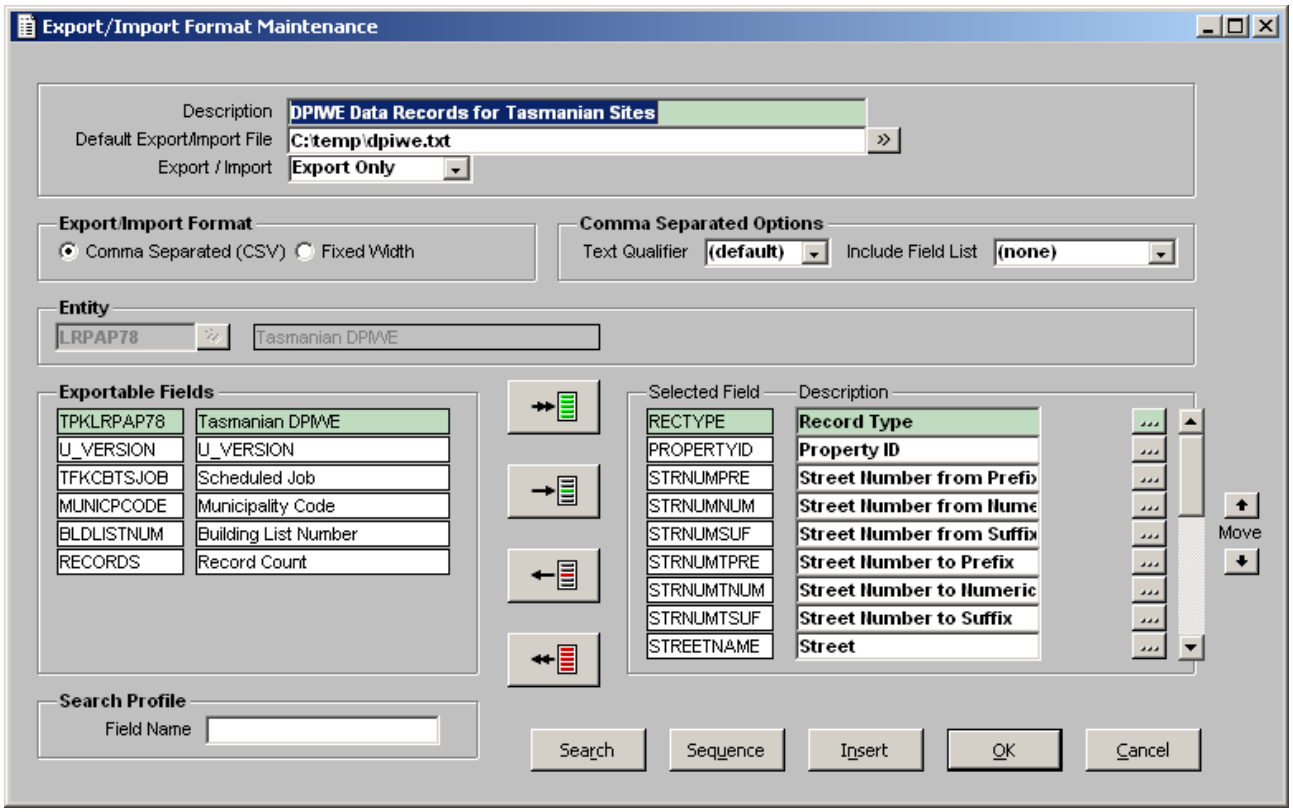
Table 2 - Record Structure is for provision of a Data Record for the extract for the DPIWE – LRPAP78

Item #	Item Name	Description	LRPAP78 Field
1	RSV	Data Record Type	RECTYPE
2	Property ID	Property ID	PROPERTYID
3	Street Number from Prefix	Street Number From Prefix	STRNUMPRE
4	Street Number From Numeric	Street Number From Numeric	STRNUMNUM
5	Street Number From Suffix	Street Number From Suffix	STRNUMSUF
6	Street Number To Prefix	Street Number To Prefix	STRNUMTPRE
7	Street Number To Numeric	Street Number To Numeric	STRNUMTNUM
8	Street Number To Suffix	Street Number to Suffix	STRNUMTSUF
9	Street	Street Name	STREETNAME
10	Street Type Code	Street Type Code	STRTYPCDE
11	Suburb Locality	Suburb Locality	SUBURBLOC
12	Valuation Reason	Valuatio Reason	VALREASON
13	Building Cost Amount	Building Cost Amount	BUILDCOST
14	Client Reference Number	Client Reference Number	REFNUM

The actual table of records are populated from various details from the Application or the Property Record associated to the Application.

Some are self explanatory whilst others are detailed below as to where the information is extracted from.

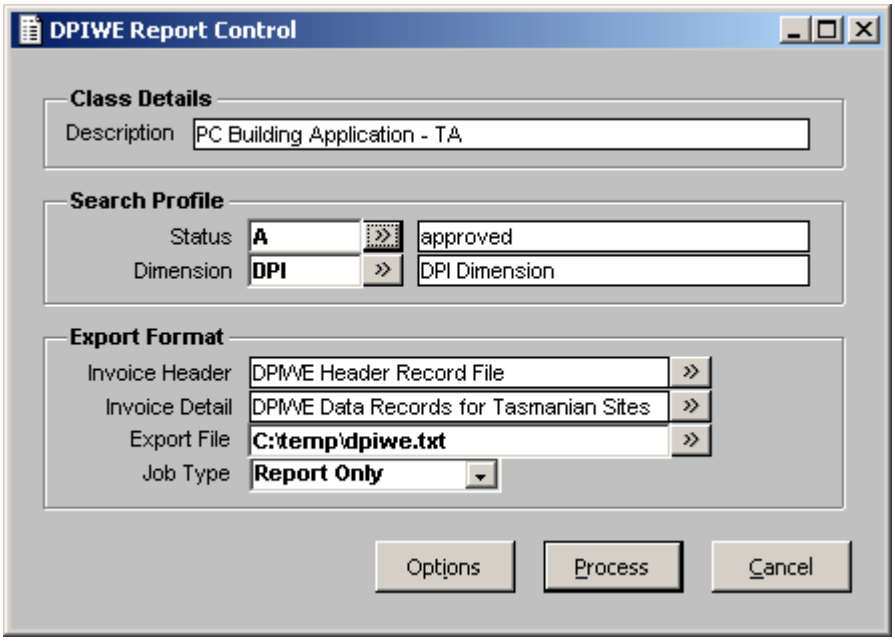
- Property ID is VG Number which is extracted from the Rating Assessment
- Valuation Reason is the description from the description field on the Application ie Alterations
- Building Cost is from the Dimension selected on the Batch Control form.
- Client Reference Number is the Application Number (9) characters.
- Street Type is extracted from the Property Qualifier and truncated to 4 Characters. For example Avenue would be truncated to “Aven” etc.



DPIWE Control Form

Tasmanian Sites have a requirement for a report to be created so that it can be run on a regular basis. This report provides information to the Department of Primary Industry.

The Control Form allows for the selection of the Status / Dimension to be used for reporting on the Building Costs as part of the extract.



DPIWE Control Form

Class Details - Description

This field details the name of the Class currently selected.

Search Profile - Status

The Status entered is the Status from the Application that is used to extract the information regarding the Building Cost Value. The Pop Up button can be used to display a list of valid Status for selection of the required code.

Search Profile – Dimension

The Dimension entered is the Dimension from the Application that is used to extract the information regarding the Building Cost value.

The Dimension field is mandatory when running the Report. The Pop Up button can be used to display a list of valid Dimensions for selection of the required code.

Export Format – Invoice Header

The Export Format that has been defined via Query to be used to create the Header Record for the Extract File is to be entered into this field. If the Format is not know then the Pop Up can be used to display a list of available Export Formats for the LRPAP78 Tasmanian DPIWE Entity.

Export Format – Invoice Detail

The Export Format that has been defined via Query to be used to create the Detail Record for the Extract File is to be entered into this field. If the Format is not know then the Pop Up can be used to display a list of available Export Formats for the LRPAP78 Tasmanian DPIWE Entity.

Export Format – Export File

The Export File that has been defined via Query to be used for the creation of the Detail Record for the Extract File is defaulted into this field. If the Export File is to be changed then the Pop Up can be used to search for a different File.

Export Format – Job Type

Upon entry to the form the Job Type defaults to Report Only. When run in Report Only mode then the extract file is created for verification along with a report showing the number of records selected. When run in Report and Update mode the Extract Date field for DPIWE on the Application will be updated with todays date, the extract file will be produced using the Next Building List Number and a report showing the number of records extracted.

Fees Report

As applications are lodged, various fees are charged. The fees charged depend upon the Application Type lodged and may be maintained by the operator for an individual application.

The following comprehensive range of selection criteria is available:

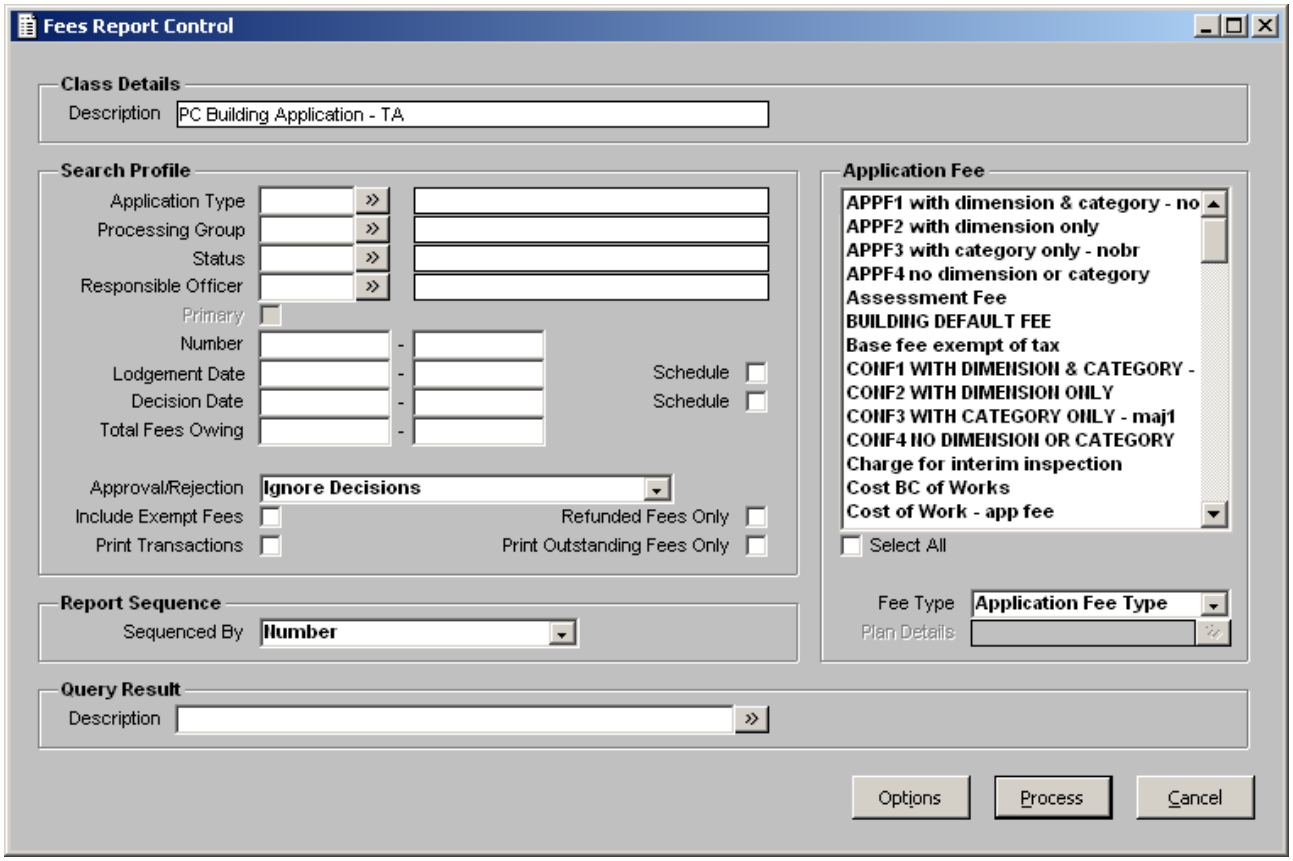
- Class
- Application Type
- Processing Group
- Responsibility
- Status
- Application Number Range
- Lodgement Date Range
- Decision Date Range
- Total Fees Owing Range
- Days prior Final Decision
- Approval/Rejection

Additional Reporting Selections include:-

- Report Sequence
- Print Outstanding Fees Only
- Refunded Fees Only
- Include Exempt Fees
- Print Transactions

Fees Control Report Form

The Fees Report allows the User to create a report based on specific criteria entered. Several fields may be chosen as part of this criterion. The Report may be generated instantly as an interactive report, or may be 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. The report can also be run to highlight overpayments on Applications.



Fees Control Report Form

NOTE: If a user does not select all fees that are potentially used for the selected range of applications the Total Columns for Amount Paid, Amount Refunded or Balance fields may not show the correct totals. To ensure that these totals are correct all fees should be selected.

Class Details - Description

This field details the name of the Class currently selected.

Search Profile - Application Type

The Application Type is used to select the particular Application Type required for this Report Selection.
The Application Type Pop Up Button may be used to select a particular Application Type if the Application 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 - Processing Group

The Processing Group is used to select the particular Processing Group required for this Report Selection.
The Processing Group Pop Up Button may be used to select a particular Processing Group if the Processing Group Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Processing Group 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 Application 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 inconjunction 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 - Application Number Range

The Application Number Range may be used to select a particular “from” and “to” range of Applications required for Reporting on. Enter a number in the first field and tab to the second field to enter a “to” number.

Search Profile - Lodgement Date Range

The Lodgement Date Range may be used to select a particular “from” and “to” range of Lodgement 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 - 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.

Search Profile - 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.

Search Profile - Include Exempt Fees

To have Exempt Fees included in the Report, this box must be checked on.

Search Profile - Refunded Fees Only

To have Refunded Fees only included in the Report, this box must be checked on.

Search Profile - Print Transactions

To have Transactions included in the Report, this box must be checked on.

Search Profile - Print Outstanding Fees Only

To have only Outstanding Fees included in the Report, this box must be checked on.

Fee - Application/Contribution Plan Fee

This field displays all the Application/Contribution Fees relating to a particular Class.

The display is regulated by the Fee Type selected, eg if Application Fee Type is selected the only the Application, Consent and Building Classification Fees are displayed.

If the Contribution Fee Type is selected then all the Contribution Fees relating to a particular Plan will be displayed.

This field is multi-selectable. Click on one field and either use the shift or control keys to select other Application Fees for inclusion in the Report. In addition to these Application Fees it is possible to select the Overpayment Fee to highlight Applications with Overpayments on them.

Fee – Select All

The Select All field can be used to select all the Fees that are displayed in the Fees section of the selection form. This will highlight all the fees in the field so that the User does not have to manually select all the fees if they are required for the report.

Fee - Fee Type

The Fee Type Field regulates which fees will be displayed

Fee - Plan Details

This field further regulates the display of Contribution Fees.

If no Plan Details are selected all Contribution Fees will be displayed.

If Plan Details are selected then only those Contribution Fees associated with the particular Plan will be displayed.

Report Sequence - Sequenced by
This field may be used to enter a Report Sequence. A drop down button is provided to select from a pre-defined range.

Query Result - Description
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.

Lapsed/Expired Report

The following must be considered for the Lapsed/Expired Report to function.

Permits to be included in the report will only be considered where they have an approved decision against them.
The Application Types within Parameters must have the Expiry option set to 'Based on Final Decision Date'

The Report will then function as follows:

The Report Option would be processed for a decision date range specified.
Prior to processing the Report, Users can assign a Merge Type to associate to each Permit. It then will create this letter for each application.

The letter then gives the applicant or appropriate person the opportunity to contact the Council and have extensions granted or supply information as to the status of the Permit.

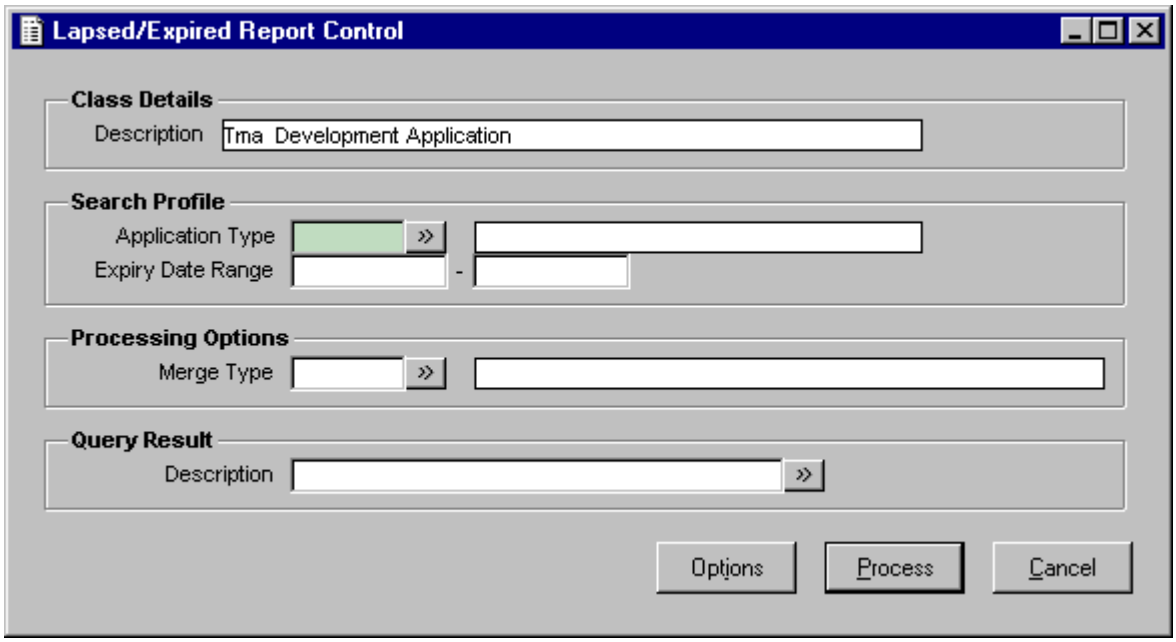
If the applicant responds and requests an extension – this can be granted if required. The extension will then update the Expiry Date to stop the application being given the status of Lapsed.

If the applicant responds and gives details of completion dates etc, these dates can be entered on the Application Data Maintenance Form and the Expiry Date will be cleared. The application will then not be included in the Report.

If no reply is received then the application will be included in the Update Report and the status will be updated to the 'Lapsed' status Decision Type and the Expiry Date will be cleared. This Permit will then never be selected again as there is not Expiry Date to be checked.

Lapsed/Expired Report Control Form

The Lapsed/Expired Report allows 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.



Lapsed/Expired Report Control Form

Class Details – Description

This field details the name of the Class currently selected.

Search Profile – Application Type

The Application Type is used to select the particular Application Type required for this Report Selection.

The Application Type Pop Up Button may be used to select a particular Application Type if the Application Type Code is not known. Select a Type and Click OK. The Lapsed/Expired Report Screen will be returned to continue selections.

Search Profile- Expiry Date Range

The Expiry Date Range may be used to select a particular “from” and “to” range of Applications required for Reporting on using the Expiry Date. Enter a date in the first field and tab to the second field to enter a “to” date.

Processing Options – Merge Type

The Merge Type is used to select the particular Merge Type required for this Report Selection.
The Merge Type Pop Up Button may be used to select a particular Merge Type if the Merge Type Code is not known. Select a Type and Click OK. The Lapsed/Expired Report Screen will be returned to continue selections.

Query Result – Description

The Query Result Option may be used. The Pop Up Button may be selected to choose from any pre-defined Queries.

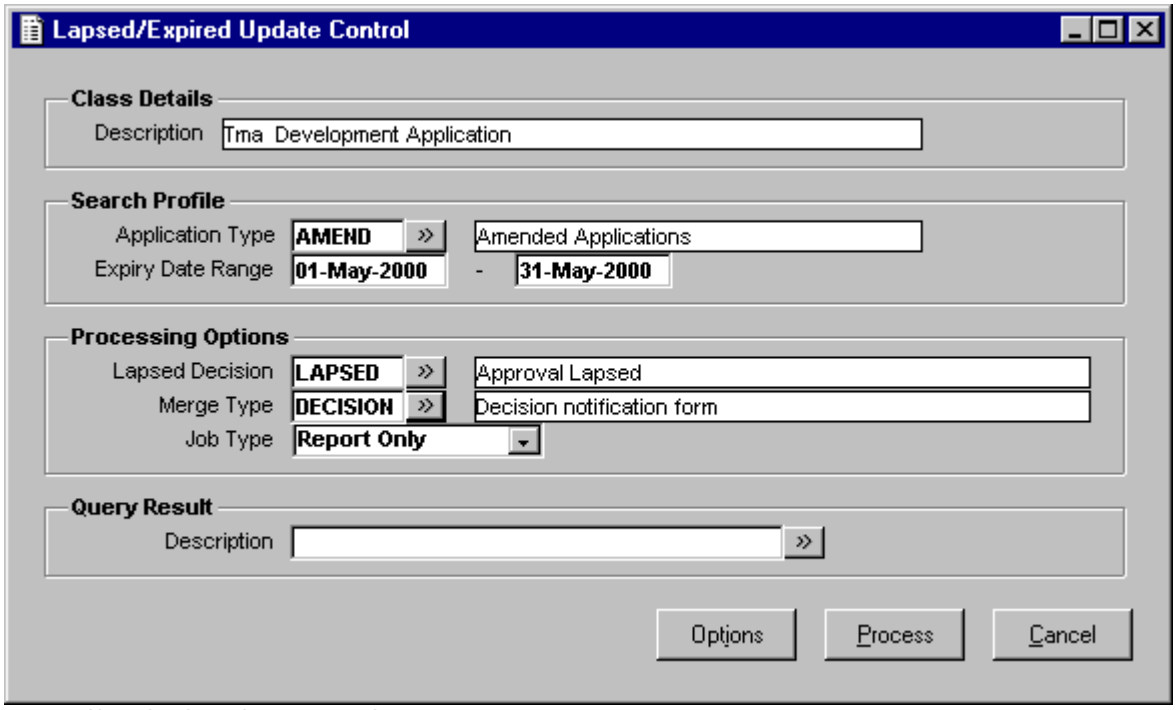
Lapsed/Expired Update

When the Update Report is processed for the same period as the 'Lapsed Report' was processed, then all Permits that have not been changed or extended will then lapse. They will have their status changed and their Expiry Date cleared.

Effectively they will not be reported on again.

Lapsed/Expired Update Control Form

The Lapsed/Expired Update Report allows the User to create a report based on specific criteria entered. Several fields may be chosen as part of the 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.



Lapsed/Expired Update Control Form

Class Details – Description

This field details the name of the Class currently selected.

Search Profile – Application Type

The Application Type is used to select the particular Application Type required for this Report Selection.

The Application Type Pop Up Button may be used to select a particular Application Type if the Application Type Code is not known. Select a Type and Click OK. The Lapsed/Expired Update Report Screen will be returned to continue selections.

Expiry Date Range

The Expiry Date Range may be used to select a particular "from" and "to" range of Applications required for Reporting on using the Expiry Date. Enter date in the first field and tab to the second field to enter a "to" date.

Processing Options - Lapsed Decision

The Lapsed Decision is used to select the particular Applications required for this Report Selection.

The Lapsed Decision Pop Up Button may be used to select a particular Lapsed Decision if the Lapsed Decision Code is not known. Select a Type and Click OK. The Lapsed/Expired Report Screen will be returned to continue selections.

Processing Options – Merge Type

The Merge Type is used to select the particular Merge Type required for this Report Selection.

The Merge Type Pop Up Button may be used to select a particular Merge Type if the Merge Type Code is not known. Select a Type and Click OK. The Lapsed/Expired Report Screen will be returned to continue selections.

Processing Options – Job Type

The Job Type is used to select the particular Job Type required for this Report Selection.
Options available are;

- Report Only
- Update and Report

Query Result – Description

The Query Result Option may be used. The Pop Up Button may be selected to choose from any pre-defined Queries.

Lost Numbers Report

The Applications Module has the ability to track Lost Numbers under the two following scenarios:

During the Lodgement of an Application. If the Lodgement is cancelled after the message that a Number had been generated, that number is stored in a “Lost Numbers” table”
When an Application is deleted. If an Application 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:

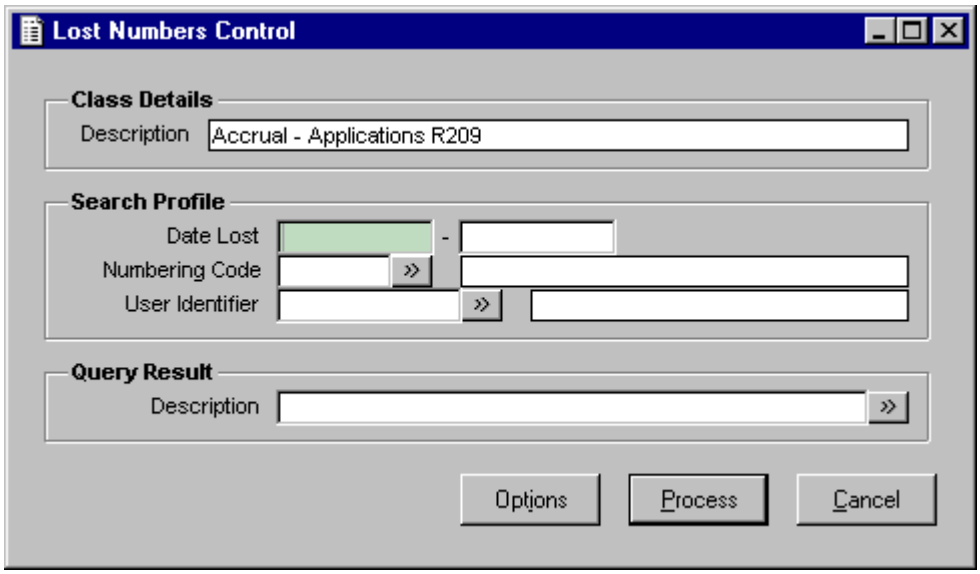
- Number: Number of the Application
- Year: Application Year
- Date Lost: Date (including time) the Number was lost
- User Identifier: Users ID
- User Name: User Name
- Mode: Lodgement or Deleted

The Lost Application Numbers are grouped by the Numbering Code and a total is given for each Number Code as well as a Total number of Applications 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 Applications 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 displayed the Pop Up Calendar to allow selection of the required date.

Search Profile – Numbering Code

The Numbering Code may be used to select a particular range of Applications 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 Applications 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.

Long Service Levy Extract & Report

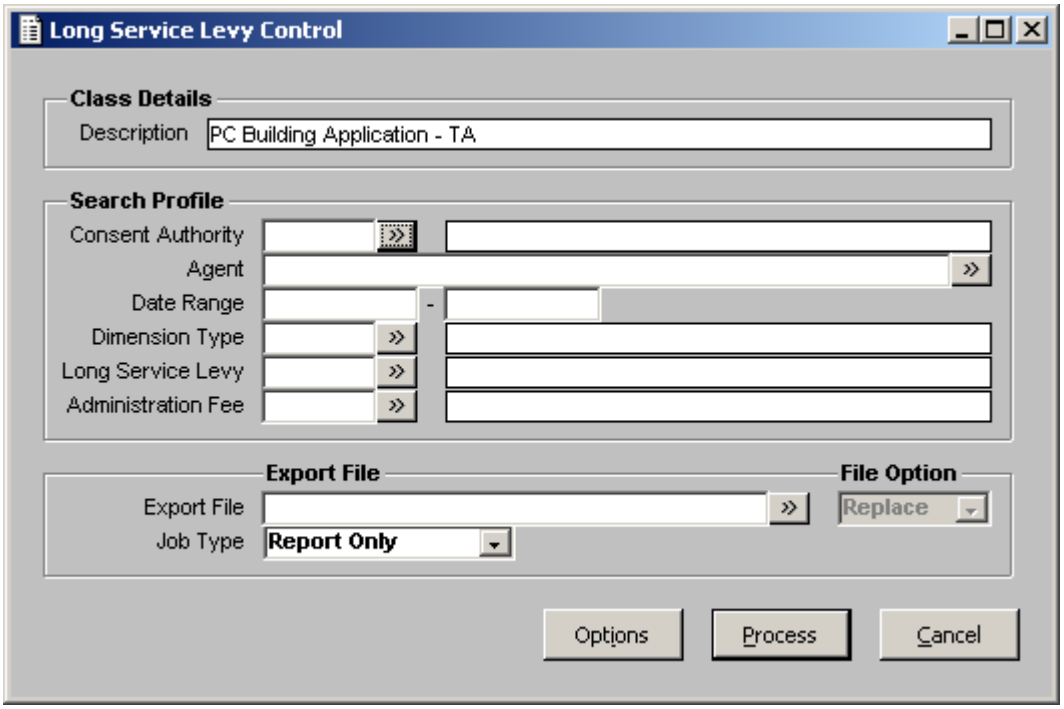
Long Service Levy Control Form

The Long Service Levy Report is used to supply information to the Building and Construction Long Service Levy Payments Corporation.

The Long Servicew Levy Report can be run in “Report Only’ mode which will create a detail report for Council to check on all payments Transaction created during the Period. While in the “Update and Report” mode an additional extract file will be created.

The Date Range in the Long Service Levy Control nominates a range for selecting applications. The process checks the relevant fee associated to the Long Service Levy Fee to see if it exists on the application, and that it has been paid before the End Date. If this matches the criteria then its application is selected to be included in the report.

NOTE: - The Corporation requires transactions to be reported differently for applications which have been previously reported. Payment transactions of new applications will be combined into one ‘P’ type record (Payment) while for already reported applications, their individual payment transactions will be recorded as type ‘A’ (Adjustment). Therefore the ‘Update and Report” mode should only be run after checking the Council report created in ‘Report Only’ mode.



Long Service Levy Report Control Form

Class Detail - Description
This field details the name of the Class currently selected.

Search Profile – Consent Authority
The Consent Authority, or Municipality Code required for reporting is nominated in this field. The code can be entered in directly or the Pop Up used to display a list of active Code to select from.

Search Profile - Agent

The Agent field is the Information Type that contains the Agent information for the Consent Authority that has been selected. Its value will be extracted from the Consent Authority when the report is run.

Search Profile – Date Range

The Date Range is used to select Applications that have been paid or adjusted during the Date Range nominated.

Search Profile - Dimension

Enter in the Dimension that is required to be reported on. The Dimension Code can be entered directly or the Pop Up can be used to display a list of valid Dimensions to select from. This Dimension would be the used to extract work values of the Applications. This Dimension would usually be related to the Levy Fee.

Search Profile – Long Service Levy

The Fee used for the Long Service Levy is entered into this field. The Fee Code can be entered directly or the Pop Up can be used to display a list of valid Fee Codes to select from. Only Transactions for the entered Fee are extracted and placed into the report as well as the export file.

Search Profile – Administration Fee

The Administration Fee is an administration fee or agency fee that is kept by each Council for each application sent. The Administration Fee can be entered directly or the Pop Up can be used to display a list of valid Fee Codes to select from.

Export File

The Export File is created to forward Fee details to the Construction Long Service Levy Payments Corporation. Enter in the path where the Export File is to be created.

File Option

The File Option is only available for selection when the Job Type has been set to 'Update and Report'. The options available are Replace which, if selected, will clear the export file and replace it with new data. If 'Append' is selected, then the data will be added into the existing Export File.

Job Type

The Job Type allows the User to run the process in Report Mode only so that information can be checked prior to extracting the file.

The options available are :-

- Report Only (produces a Report for all Fees)
- Update and Report (produces a Report and an extract File)

NSW Planning Performance Montoring Extract

NSW Planning Performance Monitoring Extract Control Form

This new menu option will be available via the Applications >> Batch menu. Before displaying the users will be required to select the Application Class to run over.

The user will be required to enter an inclusive date range to run the data extract over.

The batch function will produce a report and 4 CSV files. The report will list the counts required for the Outstanding Decisions and Post Occupancy Certificates sections of the General Council Data worksheet of the NSW Planning Department Performance Monitoring spreadsheet. This information from the report will then have to be manually entered by the user into the correct sections of the General Council Data worksheet.

An exceptions report may also be produced if there are Applications to be output that have incomplete Stop the Clock or Referral Tasks linked.

The control form will allow the user to enter a name and location to save the 5 CSV files produced.

The 5 files will contain:

File	Contents
Unit Record Data	Extract of the Applications that were Approved in date range specified
Address Fields	Address Information of Applications in the Unit Record Data file
Legal Appeals	Information on Applications that had Appeal Determined within the date range
S82A Reviews	Extract of Applications that had the Review Determined within the date range
Variation Data	Information on Applications that have Variation Data and were Approved in the date range specified.

In order to generate the correct data users will be required to 'map' fields from the NSW Department of Planning Performance Monitoring spreadsheet to specific fields within Pathway. This will all be done via the Extract Control Form. These mappings are listed in the table below:

It has been decided that Development Categories are to be used instead of Registers to hold the required data.

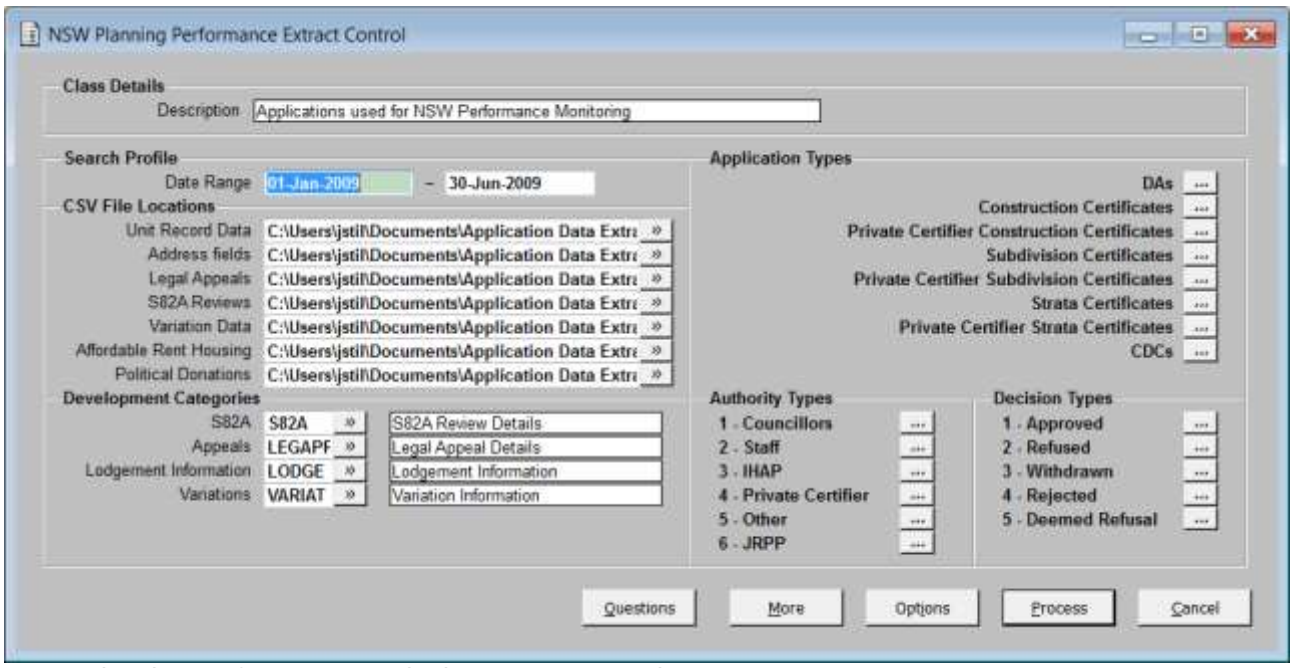
Spreadsheet Field	Pathway Field
General Council Data Worksheet	
Total number of DAs decisions undetermined	Applications of the selected 'DA' Application Types without a 'Final Approval' Decision within the report period.
Total number of s96 decisions undetermined	Applications of the selected 'DA' Application Types that have been Amended and are without a 'Final Approval' Decision within the report period.
Total number of s82A Review decisions undetermined	Applications of the selected 'DA' Application Types with the s82A Development category and a value in the s82A Lodgement Date question field, but without a s82A Decision Date in the report period.
Total number of Appeals decisions undetermined	Applications of the select 'DA' Application Types with the Appeal Development category linked and a value in the Appeal Lodgement Date question field, but without a Appeal Determination in the report period.

Total number of Construction Certificates issued by Council	Applications of the selected 'CC' Application Types and with a 'Final Approval' Decision in the entered date range.
Total number of Construction Certificates issued by Private Certifiers	Applications of the selected 'PCC' Application Types and with a 'Final Approval' Decision in the entered date range.
Total number of Occupation Certificates issued by Council	A Count of the number of Certificates of the selected 'Council Occupation Certificate' Type issued in the date range.
Total number of Occupation Certificates issued by Private Certifiers	A Count of the number of Certificates of the selected 'Private Certifier Occupation Certificate' Type issued in the date range.
Total number of Subdivision Certificates issued by Council	Applications of the selected 'Subdivision Certificate' Application Types and with a 'Final Approval' Decision in the entered date range.
Total number of Subdivision Certificates issued by Private Certifiers	Applications of the selected 'PCSC' Application Types and with a 'Final Approval' Decision in the entered date range.
Total number of Strata Certificates issued by Council	Applications of the selected 'Strata Cert' Application Types and with a 'Final Approval' Decision in the entered date range.
Total number of Strata Certificates issued by Private Certifiers	Applications of the selected 'Private Certifier Strata Cert' Application Types and with a 'Final Approval' Decision in the entered date range.
Unit Record Data Worksheet	
Application Type DA, S96 or CDC	User will need to select multiple Application Types – to map to each Planning type ('DA', and 'CDC'). Amended 'DA' Application Type Applications will be deemed to 'S96' Applications.
Reference Number	Formatted Application Number
Address Fields – Lot Number, DP Number, Section number, Unit or Apartment Number, Street Number, Street Name, Suburb, Postcode	Taken from the Property information of the Locations linked to the Application, and output to the separate 'Address Fields' file.
Estimated Construction Value	User will need to select the Application Dimension Type that holds this information
Date Lodged	Application Lodgment Date
Category of development	A matching Question in the Lodgement Information Development category will need to be selected
Concurrence Required	A matching Question in the Lodgement Information Development category will need to be selected
Designated development	A matching Question in the Lodgement Information Development category will need to be selected
Integrated development	A matching Question in the Lodgement Information Development category will need to be selected
Total stop-the-clock days	Users will need to select the Task Types that will be used. The total will be calculated by adding up the number of days these tasks were active on the Application – without any double counting. If the Application has a Task of the selected Types that is not completed then an exception record with be created and the Application will not be output in the Unit Record data file.
Total referral days	Users will need to select the Task Types that will be used. The total will be calculated by adding up the number of days these tasks were active on the Application – without any double counting. If the Application has a Task of the selected Types that is not completed then an exception record with be created and the Application will not be output in the Unit Record data file.

Date determined	Decision date of the 'Final Approval' decision
Level of Determination – 1. Councilors, 2. Staff, 3. IHAP, 4. Private Certifier, 5. Other	Multiple Authority types will need to be selected to match with each of the 5 different levels in the spreadsheet.
Determination Type – 1. Approved, 2. Refused, 3. Withdrawn/Cancelled, 4. Rejected, 5. Deemed Refusal	Multiple Decision types will need to be selected to match with each of the 5 different types in the spreadsheet.
Number of new dwellings	Number of Units from the first Building Type on the first Building Classification on the Application.
Number of pre-existing dwellings	Pre-existing dwellings from the first Building Type on the first Building Classification on the Application
Number of dwellings to be demolished	Demolish Dwellings from the first Building Type on the first Building Classification on the Application
S96 Modification Type	A matching Question in the Lodgement Information Development category will need to be selected
Use of Private Assessment	A matching Question in the Lodgement Information Development category will need to be selected
Use of IHAP	A matching Question in the Lodgement Information Development category will need to be selected
Number of submissions	Count of the number of responses linked to the Application that are of the selected Response Types.
Pre DA Meeting Held	A matching Question in the Lodgement Information Development category will need to be selected
Change of Use	A matching Question in the Lodgement Information Development category will need to be selected
Appeals Worksheet	
Application Type	'DA' Applications are those of the previously selected 'DA' Application Types. 'S96' Applications are those that have a 'DA' Application Type and have been Amended.
Reference Number	Application number
Legal appeal class	A matching Question in the Appeal Development category will need to be selected
Legal Appellant	A matching Question in the Appeal Development category will need to be selected
Legal Appeal Determination Date	A matching Question in the Appeal Development category will need to be selected
Legal Appeal Outcome	A matching Question in the Appeal Development category will need to be selected
S82A Reviews Worksheet	
Application Type	'DA' Applications are those of the previously selected 'DA' Application Types. 'S96' Applications are those that have a 'DA' Application Type and have been Amended.
Reference Number	Application number
S82A reference number	Application number
S82A Decision	A matching Question in the S82a Development category will need to be selected
S82A Decision Date [Note not required in worksheet but needed to determine if must be extracted].	A matching Question in the S82a Development category will need to be selected
Variation Data Spreadsheet	
DA Reference Number	Application number
Lot Number, DP number, Apartment/Unit Number, Street Number, Street Name, Suburb/Town and Post Code	Taken from the Property information of the Locations linked to the Application.
Category of Development	A matching Question in the Lodgement Information Development category will have been previously selected above

Environmental Planning instrument	A Minor Category in the Variation to Dev Standards Development category will need to be selected. Then the values from all Dimensions linked to the Minor Category can be output (separated by commas).
Zoning of land	If there is no Zone information on the Application then an attempt will be made to extract it from the first Property location on the application. The zone description will be output
Development standard to be varied	A Minor Category in the Variation to Dev Standards Development category will need to be selected. Then the values from all Dimensions linked to the Minor Category can be output (separated by commas).
Justification of variation	A matching Question in the Variation to Dev Standards Development category will need to be selected
Extent of variation	A matching Question in the Variation to Dev Standards Development category will need to be selected
Concurring authority	A matching Question in the Variation to Dev Standards Development category will need to be selected
Date determined	Decision date of 'Final Approval' decision on Application
Affordable Rental Housing	
DA Reference Number	Application number
Date Lodged	Application Lodgement Date
ARH Category	Affordable Rental Housing Category

Where Development Categories, Minor Categories, Dimensions and Questions are being used to match to spreadsheet fields it is the customer's responsibility to define the field answer values to match exactly those required by the NSW Department of Planning.



NSW Planning Performance Monitoring Extract Control Form

NSW Planning Performance Extract Control – Class Details Description
This describes the Application Class that has been selected.

NSW Planning Performance Extract Control – Search Profile Date Range
These are the range of dates that control which planning applications are included in the report.

NSW Planning Performance Extract Control – CSV File Locations
The fields here dictate where the CSV files are to be stored when the extract has been run.

NSW Planning Performance Extract Control – Application Types DA's
Selecting this button will bring up the screen to select/de-select DA type Planning Applications.

NOTE: An Application selected here may not be selected in any other group.

NSW Planning Performance Extract Control – Application Types with Construction Certificates
Selecting this button will bring up the scrren to select/de-select Planning Applications with Construction Certificates.

NSW Planning Performance Extract Control – Application Types with Private Certifier Construction Certificates
Selecting this button will bring up the scrren to select/de-select Planning Applications with Private Certifier Construction Certificates

NSW Planning Performance Extract Control – Application Types with Subdivision Certificates
Selecting this button will bring up the scrren to select/de-select Planning Applications with Subdivision Certificates

NSW Planning Performance Extract Control – Application Types with Private Certifier Subdivision Certificates
Selecting this button will bring up the scrren to select/de-select Planning Applications with Private Certifier Subdivision Certificates

NSW Planning Performance Extract Control – Application Types with Strata Certificates
Selecting this button will bring up the scrren to select/de-select Planning Applications with Strata Certificates

NSW Planning Performance Extract Control – Application Types with Private Certificate Strata Certificates
Selecting this button will bring up the scrren to select/de-select Planning Applications with Private Certificate Strata Certificates

NSW Planning Performance Extract Control – CDC Application Types
Selecting this button will bring up the screen to select/de-select CDC type Planning Applications.

NOTE: An Application selected here may not be selected in any other group.

NSW Planning Performance Extract Control – Development Categories
Selecting this button allows for the selection/de-selection of the relevant Development Category for the Label.

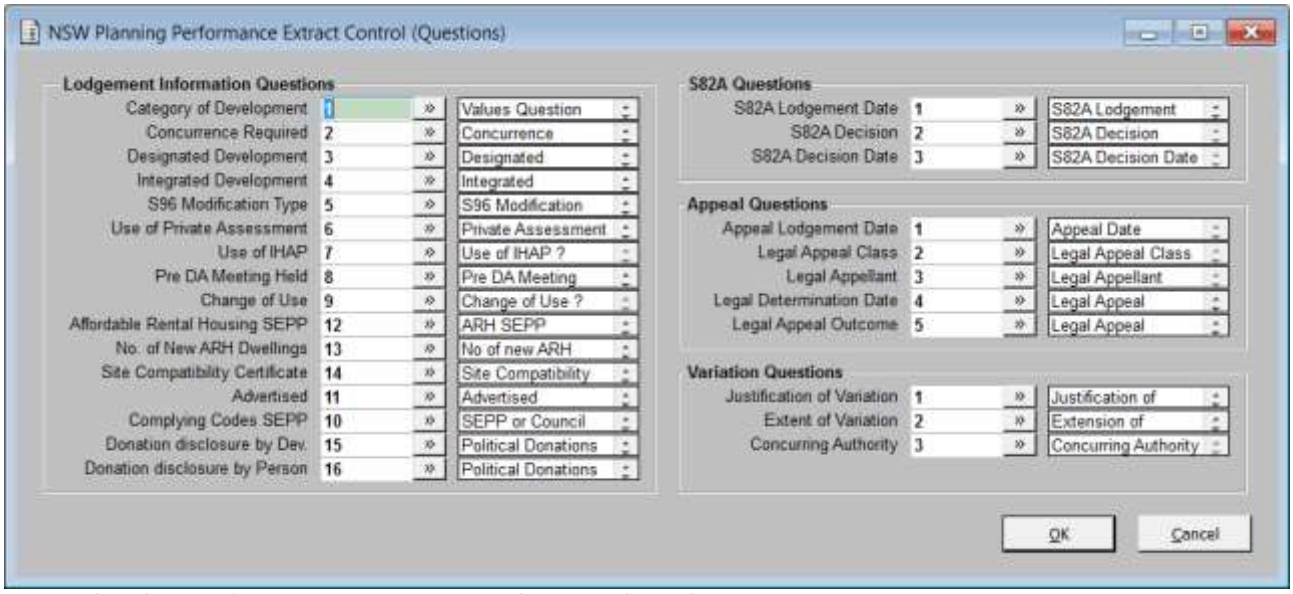
NSW Planning Performance Extract Control – Authority Types
Selecting this button allows for the selection/de-selection of the relevant Authority Types that are linked to the Planning Extract.

NSW Planning Performance Extract Control – Authority Type Selection
Selecting an Authority Type will display the form to select/de-select the relevant Authority Type. There are five Authority Types that must be entered, 1 – Councillors, 2 Staff, 3 IHAP, 4 Private Certifier, 5 Other types, 6 JRPP.

NSW Planning Performance Extract Control – Authority Type Selection – Available/Assigned
This form allows for the selection/de-selection of the relevant Authority Types for each of the Authority Groups. Care must be taken to ensure that an authority type is not selected in more than 1 grouping.

NSW Planning Performance Extract Control – Decision Types
Selecting this button allows for the selection/de-selection of the relevant Decision Types that are linked to the Planning Extract.

NSW Planning Performance Extract Control – Questions Button



NSW Planning Performance Extract Control – Questions button

Once the details on the previous form have been created the More button should be selected and the following entries must be created.

NSW Planning Performance Extract Control – Lodgement Information Questions

A Development Category to collect Lodgement Information must have been created with the following included in the Questions option for the Development Category.

Category of Development
Concurrence Required
Designated Development
Integrated Development
S96 Modification type
Use of Private Assessment
Use of IHAP
Pre DA Meeting Held
Change of Use
Affordable Rental Housing SEPP
No of New ARH Dwellings
Site Compatability Certificate
Advertised
Complying Codes SEPP
Political Donation Disclosure by Developer
Political Donation Disclosure by Applicant

NSW Planning Performance Extract Control – Variation Questions

A Development Category to collect Variations must have been created with the following included in the Questions option for the Development Category.

Justification for Variation
Extent of Variation
Concurring Authority

NSW Planning Performance Extract Control – S82A Questions

A Development Category to collect S82A Questions must have been created with the following included in the Questions option for the Development Category.

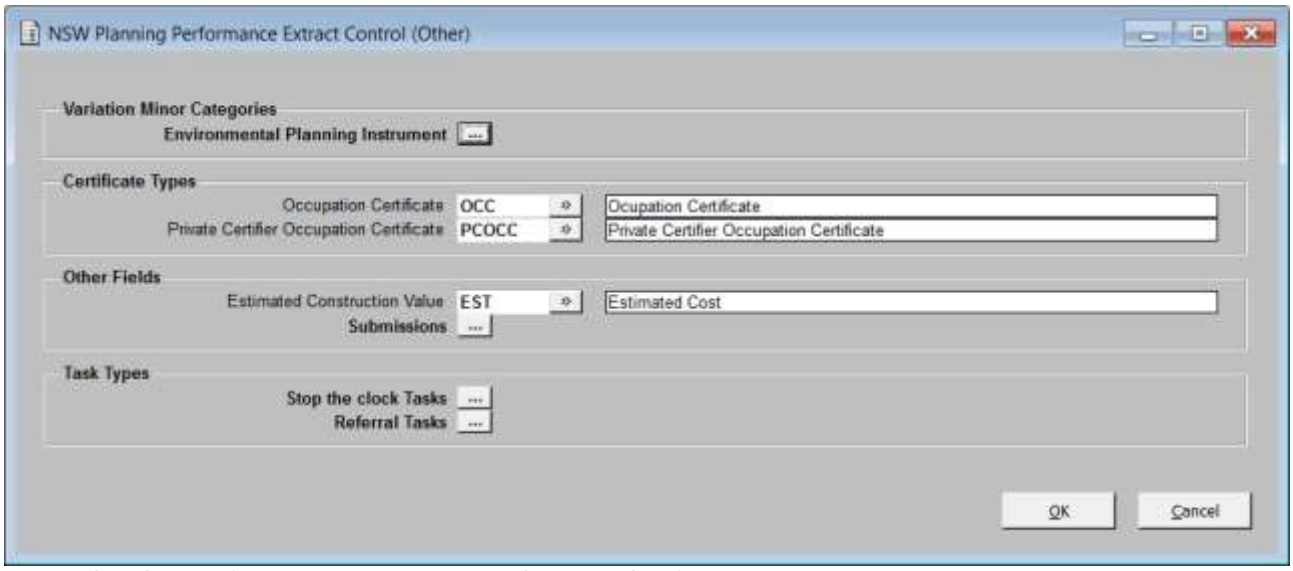
S82A Lodgement Date
S82A Decision
S82A Decision Date

NSW Planning Performance Extract Control – Appeal Questions

A Development Category to collect Appeal Questions must have been created with the following included in the Questions option for the Development Category.

Appeal Lodgement Date
Legal Appeal Class
Legal Appellant
Legal Determination Date
Legal Appeal Outcome

NSW Planning Performance Extract Control – Questions Button



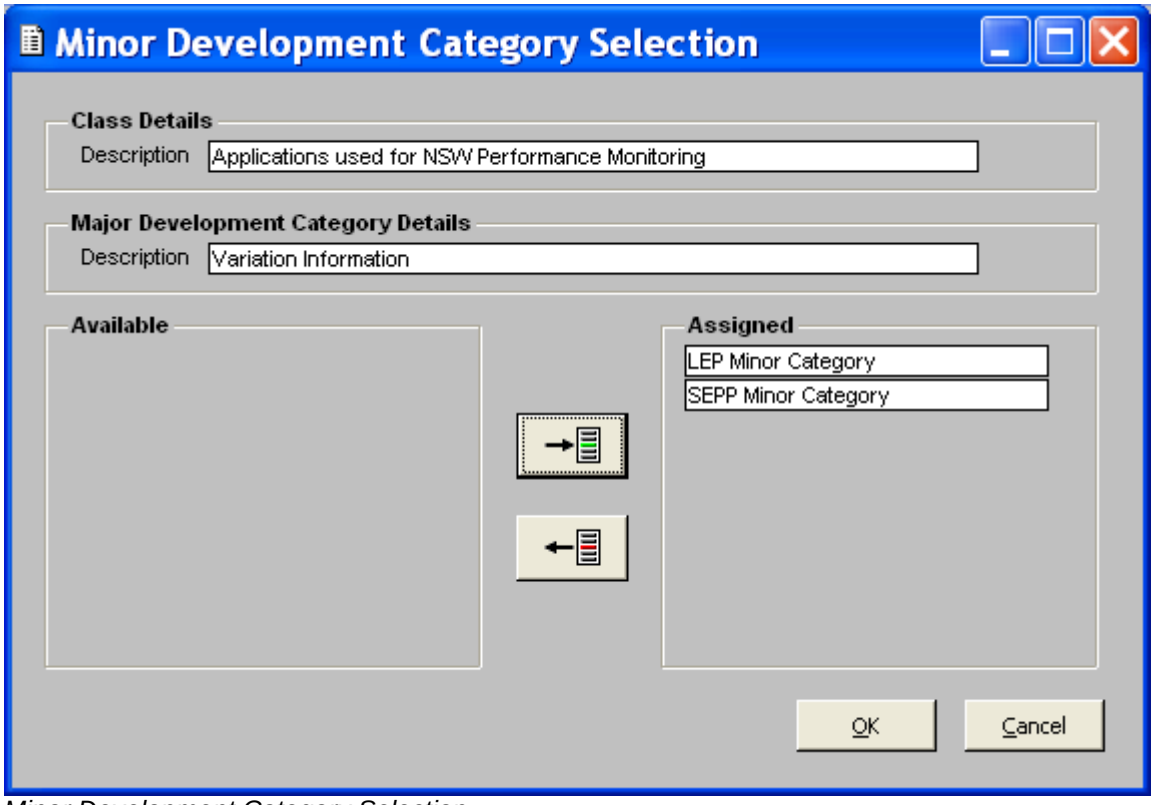
NSW Planning Perfoemance Extract Control – Question form

NSW Planning Performance Extract Control – Task Types
Selecting this button allows the user to select the details for any 'Stop the Clock' task types. More than one task type may be selected.

NSW Planning Performance Extract Control – Task Types – Class Description
This field contains the description of the selected Application Class.

NSW Planning Performance Extract Control – 'Stop the Clock' and Referral Task Types – Available and Assigned
This form displays those Task Types available for selection and those assigned as being selected. These types are those task types that 'Stop the Clock' eg Request for more information, or task types that are referred to another authority.

NSW Planning Performance Extract Control – Variation Minor Categories – Environmental Planning Instrument
Selecting this button takes the user to the form where selection of the minor categories associated with the major Variation Categories may be assigned.



Minor Development Category Selection

NSW Planning Performance Extract Control – Certificate Types – Occupation Certificate & Private Certifier Occupation Certificate

Using the Selection option will take the user to the Permit and Certificate pop up to select the relevant certificate type.

NSW Planning Performance Extract Control – Other Fields – Estimated Construction Value

Using the selection option will take the user to the Dimension Pop Up form where the Estimated Construction Value option can be selected.

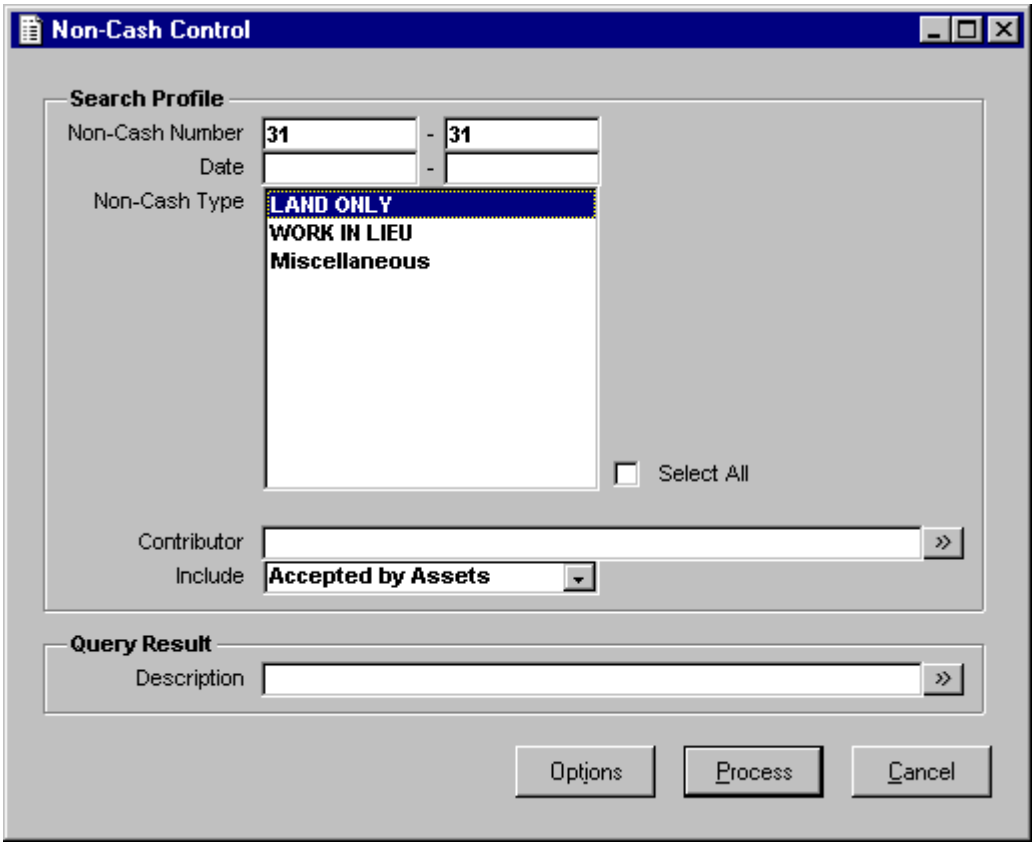
NSW Planning Performance Extract Control – Other Fields – Submissions

Using the selection option will take the user to the Response type Selection – Submission Option where the relevant available option can be assigned.

Non-Cash Control

Non-Cash Control Form

The Non-Cash Report allows 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.



Non-Cash Control Form

Non-Cash Number

The Number Range may be used to select a particular “from” and “to” range of Applications required for Reporting on. Enter data in the first field and tab to the second field to enter a “to” number.

Date

The Expiry Date Range may be used to select a particular “from” and “to” range of Applications required for Reporting on. Enter a date in the first field and tab to the second field to enter a “to” date.

Non-Cash Type

The Non-Cash Type is used to select the particular Non-Cash Type required for this Report Selection.

The Non-Cash Type Pop Up Button may be used to select a particular Non-Cash Type if the Non-Cash Type Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Type and Click OK. The Lapsed/Expired Report Screen will be returned to continue selections.

Select All

If this check box is selected, then all Non-Cash types listed will be included when the Update option is run.

Contributor

Enter the name of the Contributor, for example Smith, Paul and tab out of the field. The Contributor Name Selection form will be displayed to verify prior to selection.

The Pop Up Button may be used to select a particular Contributor from a list of Contributors.

Include
Select any one of the three options to further filter the report on.

The predefined options to select from are;

- All
- Accepted By Assets
- Not Accepted By Assets

Query Result
The Query Result Option may be used. The Pop Up Button may be selected to choose from any pre-defined Queries.

Owner Names Update Report

Owner Names Update Report Control

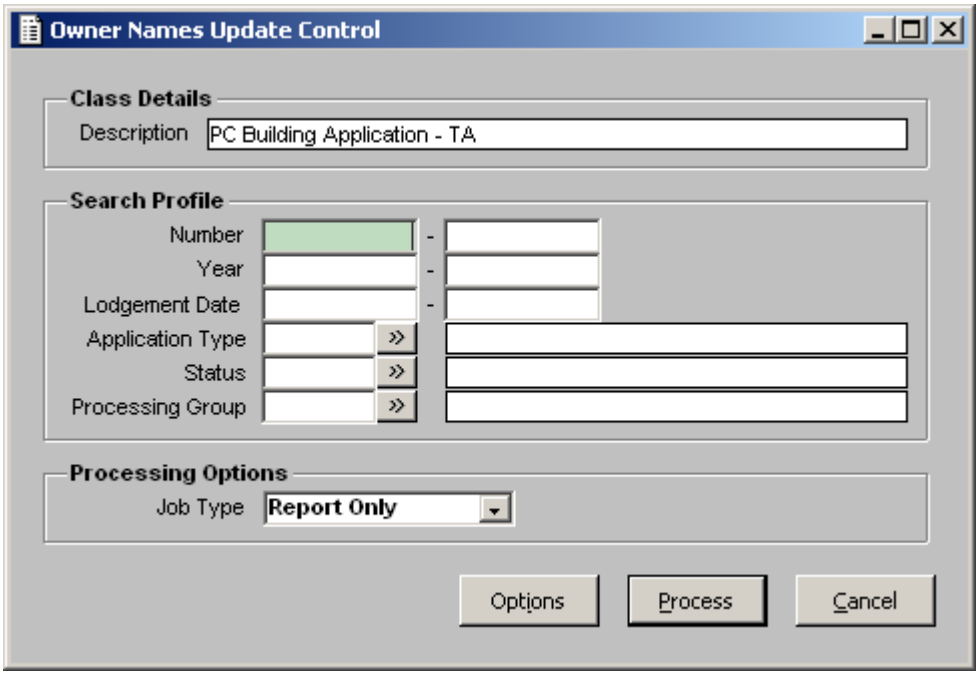
The Owner Names Update Report can be used to ensure that the most recent owner is attached to the Application Record. This allows the process to be run as a bulk option, update owner name records in one process.

The Owner Names Update Report will list the new property owners for an application 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 Application 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 Application 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 Application Number Range may be used to select a particular “from” and “to” range of Applications 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 Application 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 – Lodgement Date

The Application Lodgement Date Range may be used to select a particular “from” and “to” range of Lodgement Dates required for Reporting. Enter a date in the first field and tab to the second field to enter a “to” Lodgement Date.

This field can be used in conjunction with the other fields within the Search Profile area to further refine the selection.

Search Profile – Application Type
The Application Type is used to select the particular Application Type required for this Report Selection.

The Application Type Pop Up Button may be used to select a particular Application Type if the Application 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 Application 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 – Processing Group
The Processing Group is used to select the particular Processing Group required for this Report Selection.

The Processing Group Pop Up Button may be used to select a particular Processing Group if the Processing Group Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Processing Group 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 an application 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 an application as well as the names that have been made historic on the Application.

Print Application Letters

This Button is used to select all Application Letters that have previously been set to Print as Batched. This is typically done, when numerous letter requests are created at the one time on various applications, 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.

Print Permits and Certificates

This Button is used to select all Permits and Certificates 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 Permits and Certificates 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.

PlanFirst Levy Extract & Report

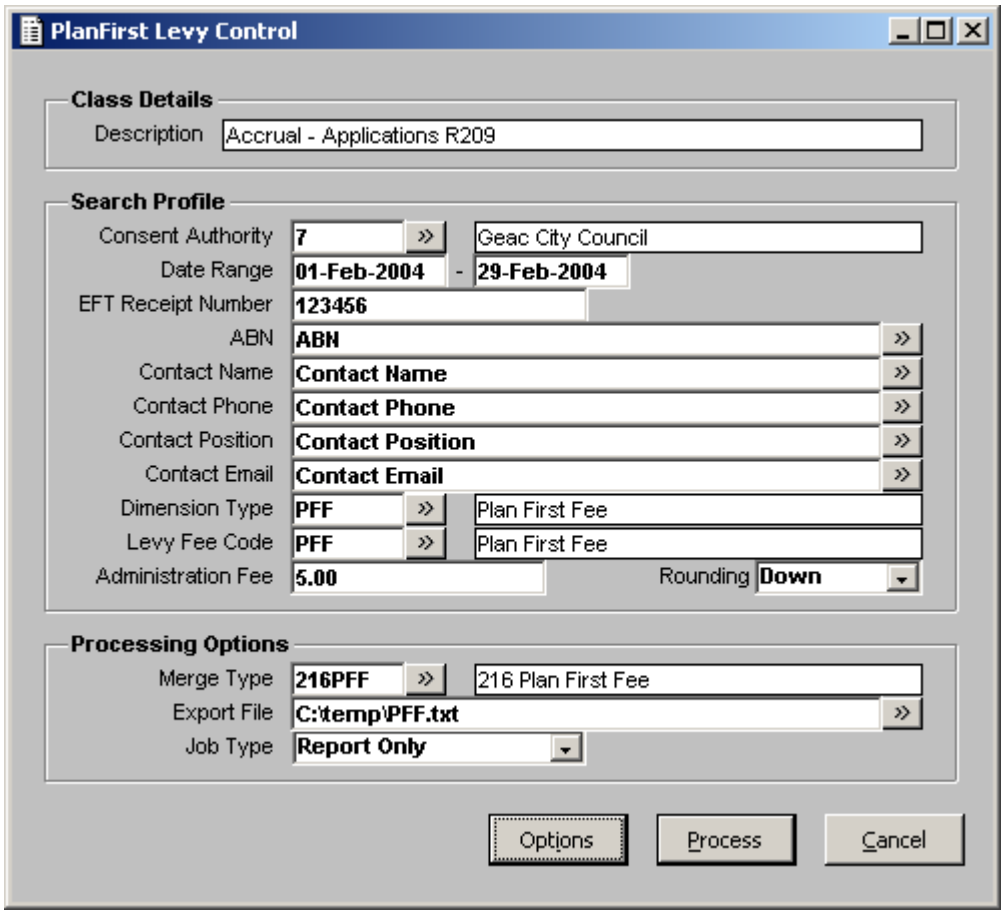
The Plan First Levy Extract and Report menu provides Council with the information that is required to be sent to Planning New South Wales. This information contains a report and a Summary Information document.

PlanFirst Levy Control Form

The Plan First Levy Report can be run in 'Report Only' mode which will create a detail report for Council to check all transactions created during the nominated Period. When the 'Update and Report' mode is selected then the Summary Information document and an Extract File are created.

The relevant fee associated to the Plan First Levy Fee is checked to see if it exists on the Application and that it has been fully paid (payment date) before the End Date. The process will then select the Application to be included in the report. Only those Applications not previously reported earlier will be extracted.

Please Note: The Plan First Authority also wish users to provide them with a list of all Applications Lodged within the relevant date range. Rather than change the report requirements, users should simply extract this information either via a Register report or Infomart report and then attach the details as either a separate spreadsheet to send to the authority, or add it as another Work sheet on the same spreadsheet sent to the Authority.



PlanFirst Levy Control Form

Class Detail - Description
This field details the name of the Class currently selected.

Search Profile – Consent Authority

The Consent Authority represents the Municipality Code that is being reported on. The Code can be entered directly or the Pop Up used to find the required Municipality Code.

Search Profile – Date Range

Enter in the Payment Date Range that is to be used to select the Applications that have been paid during the nominated range.

Search Profile – EFT Receipt Number

The EFT Receipt Number is the Receipt Number for the relevant Fees that have been electronically transferred.

Search Profile - ABN

The ABN is required on the Summary Information. This is an Information Type that has been defined by Council. The value is extracted from the Information Type that has been nominated and extracted onto the Report and Summary Information.

Search Profile – Contact Name

The Contact Name is required on the Summary Information. This is a Communication Type that has been defined by Council. The value is extracted from the Communication Type that has been nominated and extracted onto the Report and Summary Information.

Search Profile – Contact Phone

The Contact Phone is required on the Summary Information. This is a Communication Type that has been defined by Council. The value is extracted from the Communication Type that has been nominated and extracted onto the Report and Summary Information.

Search Profile – Contact Position

The Contact Position is required on the Summary Information. This is a Communication Type that has been defined by Council. The value is extracted from the Communication Type that has been nominated and extracted onto the Report and Summary Information.

Search Profile – Contact Email

The Contact E-mail is required on the Summary Information. This is a Communication Type that has been defined by Council. The value is extracted from the Communication Type that has been nominated and extracted onto the Report and Summary Information.

Search Profile – Dimension Type

Enter in the Dimension Type that is to be used to extract Work Value of the Applications being reported on. The Dimension Type is usually the one that is related to the levy fee. The Type can be entered in directly or the Pop Up used to display a list of Dimensions.

Search Profile – Levy Fee Code

Select the Levy Fee Code that has been raised for the Levy. Only payment transactions for this entered Fee will be extracted onto the Report and Summary Information.

Search Profile – Administration Fee

The Administration Fee field allows the entry of the value of the Administration or Agency Fee that is kept by each Council for each Application sent.

Search Profile - Rounding

The Options of ‘None’, ‘Up’ or ‘Down’ are available for setting in regard to how the Rounding of the Collected Fee is to be shown. Upon entry into the form the default is ‘Down’.

Processing Options – Merge Type

The Merge Type that is to be used to generate the Summary Information is to be entered into this field. This generated document will then be stored and available against the Consent Authority nominated on this form.

Processing Options – Export File

The directory path for the Export File is to be entered into this field.

Processing Options – Job Type

The Job Type defaults to ‘Report Only’ when first entering this form. When the process is run with the Job Type of ‘Report Only’ then the report is only produced.

If the process is run as ‘Update and Report’ then the report is produced along with the Export File and the Summary Information.

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 Prepayments that are unallocated only or have been allocated already. The Report can be produced in Detail or Summary format.

Prepayment Report Extract Control Form

The Prepayment 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.

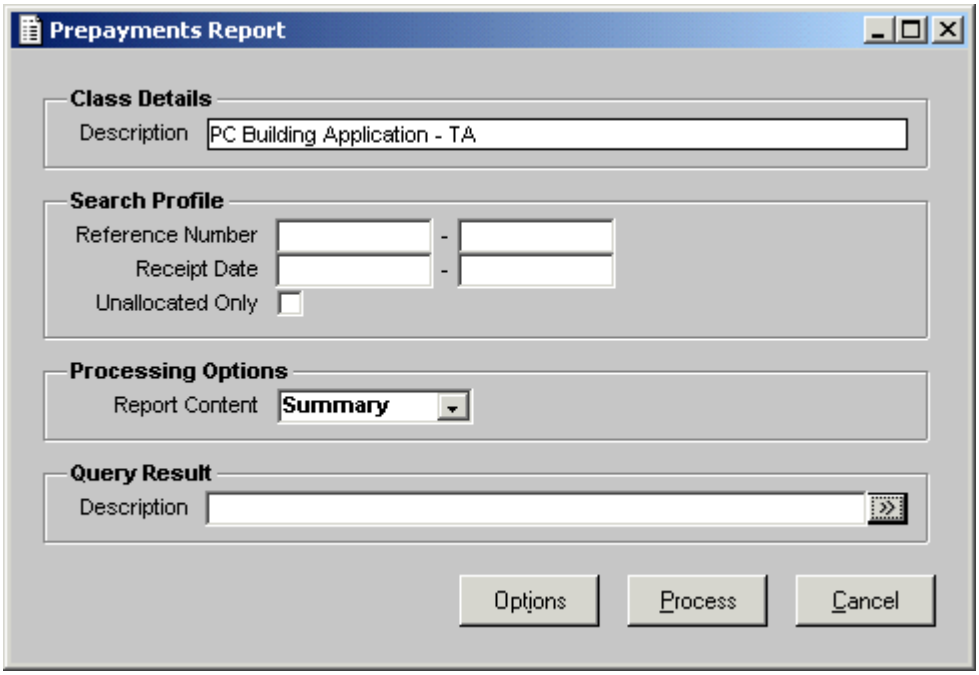
The report displays the following details for each format:

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
- Application 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 an Application. 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
- Application 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.

Rebuild General Enquiry Look-Up Table

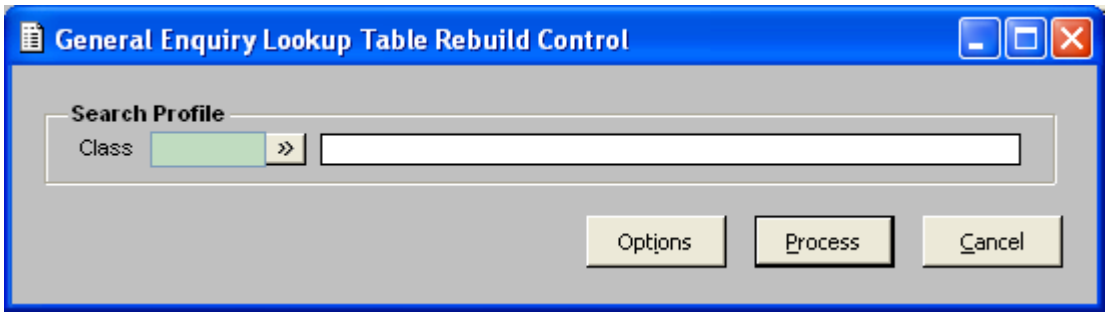
This option allows you to perform an initial build of data for the General Enquiry – Applications module so as to improve performance on complex filter requests. For example, when Work Flow Tasks are used to selected applications to be included in a List.

General Enquiry Lookup Table Rebuild Control

This option allows you to build / rebuild list information for a specific Class or for all Classes. Classes that do not have enquiry lists will not be affected.

Important Note !

This process will need to be rerun whenever a new General Enquiry List has been added or when Enquiry List Parameters for Applications have been modified.



General Enquiry Lookup Table Rebuild Control

Search Profile – Class

Leave this field Blank to select all Application Classes, or enter a Application Class Code, if know. You can use the Pop-up to select from a list of Application Classes. If a single Class is selected, its description will be displayed in the description box.

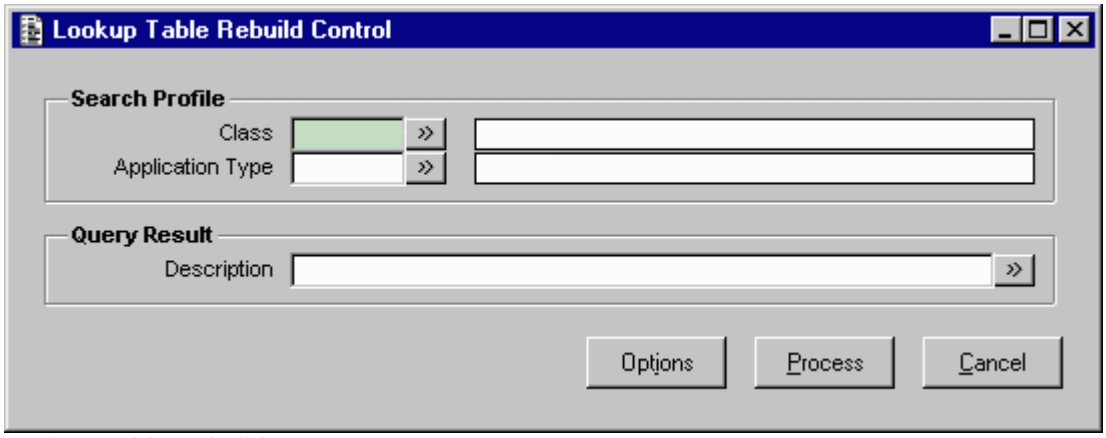
Rebuild Lookup Table

Lookup Table Rebuild Control Form

This form allows the User to Rebuild the Lookup Table for the Applications module.

This function should only be performed when advised by INFOR.

Users will be advised when a rebuild of the Lookup Table is required through the Release text.



Lookup Table Rebuild Form

Search Profile - Class

The Class is used to select the particular Class required for this Rebuild Selection.
The Class Pop Up Button may be used to select a particular Class if the Class is not known. Clicking on the Pop Up Button provides a list for selection. Select a Class and Click OK.

Search Profile - Application Type

The Application Type is used to select the particular Application Type required for this Rebuild Selection.
The Application Type Pop Up Button may be used to select a particular Application Type if the Application Type Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Type and Click OK.

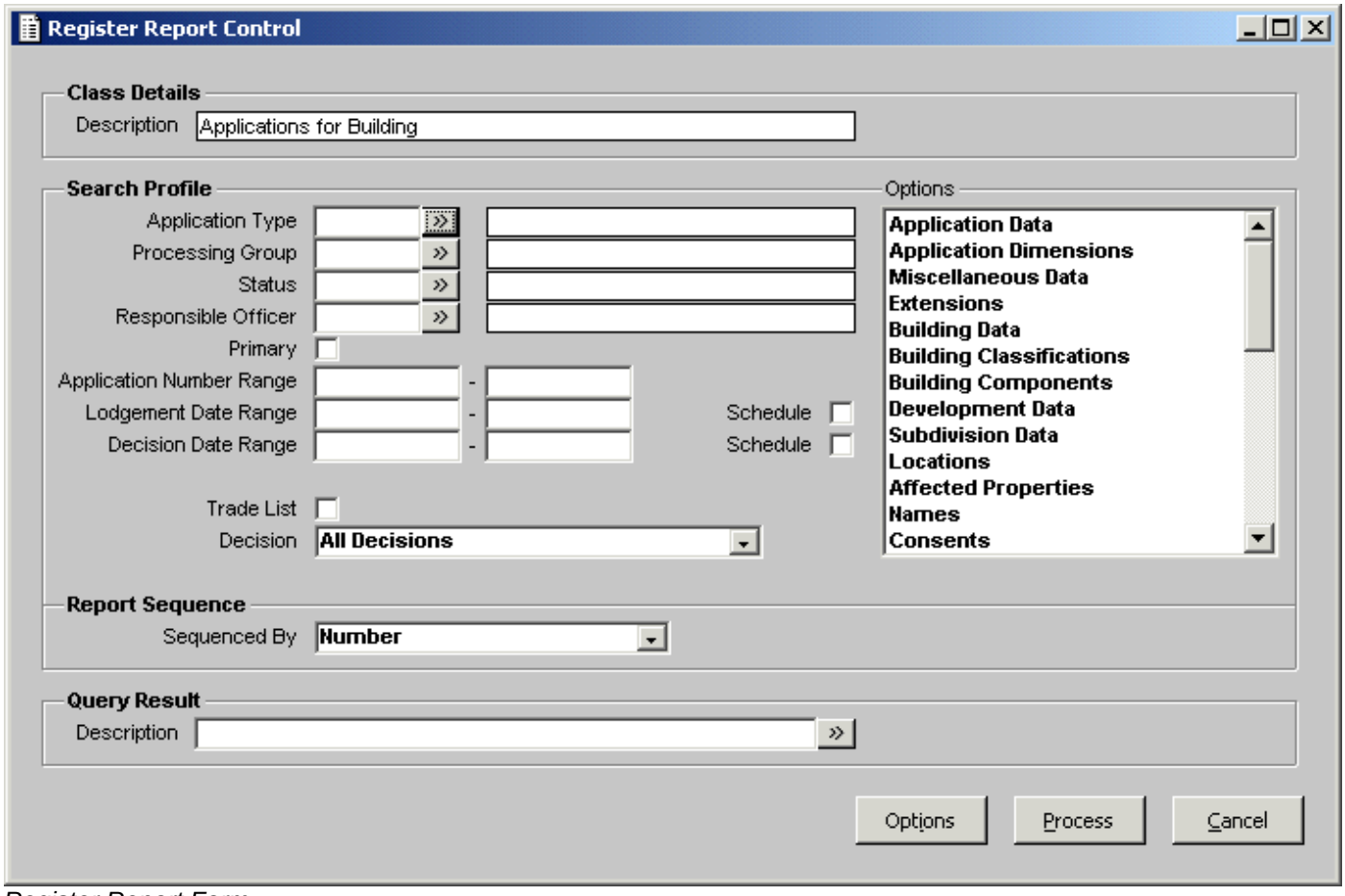
Query Result - Description

This field may be used to specify a previously created query definition to identify a group of records. Alternatively, a query may be selected from the pop up.

Register Report

Register Report Form

The Register Report allows 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.



Register Report Form

Class Details - Description
This field details the name of the Class currently selected.

Search Profile - Application Type
The Application Type is used to select the particular Application Type required for this Report Selection.

The Application Type Pop Up Button may be used to select a particular Application Type if the Application 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 - Processing Group
The Processing Group is used to select the particular Processing Group required for this Report Selection.

The Processing Group Pop Up Button may be used to select a particular Processing Group if the Processing Group Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Processing Group 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 Application 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 the required Responsible Officer and Click OK. The Register Report Screen will be returned to continue selections.

Search Profile – Primary

The Primary Flag is used inconjunction 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 - Application Number Range

The Application Number Range may be used to select a particular “from” and “to” range of Applications required for Reporting on. Enter a number in the first field and tab to the second field to enter a “to” number.

Search Profile - Lodgement Date Range

The Lodgement Date Range may be used to select a particular “from” and “to” range of Lodgement Dates required for Reporting on. Enter a number in the first field and tab to the second field to enter a “to” number.

Schedule Check Box

When the Schedule box is checked on it enables the User to schedule a regular batch report for a predefined date range for a 12 month period or longer via an end of day process.
Once a date range has been entered, the Schedule box is checked on and the Process button is selected, the Processing Options Maintenance Form is displayed. From the Run Time drop down field select End of Calendar Days option. This will bold the Schedule Button.
Select the Schedule Button and the Scheduling Options Maintenance Form is displayed.

A Schedule Date Range can be entered. From the Frequency drop down select the required option;

- Daily
- Weekly
- Fortnightly
- Monthly
- (none)

From the Run Day select the required day.

Should an exception to the running of the report be required, these exception dates can be selected by using the Calendar button.
The first time the report is run the entered date range will be used, after that the report will use the last date run as the start date and include all dates to the current run date of the report.

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 - Schedule Check Box

When the Schedule box is checked on it enables the User to schedule a regular batch report for a predefined date range for a 12 month period or longer via an end of day process.

Once a date range has been entered, the Schedule box is checked on and the Process button is selected, the Processing Options Maintenance Form is displayed. From the Run Time drop down field select End of Calendar Days option. This will bold the Schedule Button.

Select the Schedule Button and the Scheduling Options Maintenance Form is displayed.

A Schedule Date Range can be entered. From the Frequency drop down select the required option;

- Daily
- Weekly
- Fortnightly
- Monthly
- (none)

From the Run Day select the required day.

Should an exception to the running of the report be required, these exception dates can be selected by using the Calendar button.

The first time the report is run the entered date range will be used, after that the report will use the last date run as the start date and include all dates to the current run date of the report.

Search Profile - Trade List

The Trade List flag, when checked ON, will only extract Applications that are listed as Trade List Applications (on the Building Data Maintenance form). When checked OFF, both Trade List and non-Trade List Applications will be extracted.

Search Profile - Decision

The Decision may be used to select a Decision range for Reporting on. From the Decision drop down select the required option;

- All Decisions
- Approvals Only
- Rejections Only
- Decisions not Approvals or Rejections
- No Decisions
- Ignore Decisions

Options

The Report Screen consists of the Options available. Select one or more of the Options for inclusion on the Report.

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.

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. From the Sequence By drop down select the required option;

- Number
- Suburb/Street House Number
- Responsible Group Number
- Type Number
- Property Ward Number
- Processing Group Number
- Process Group Type Number

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.

Responsible Officer Reassignment

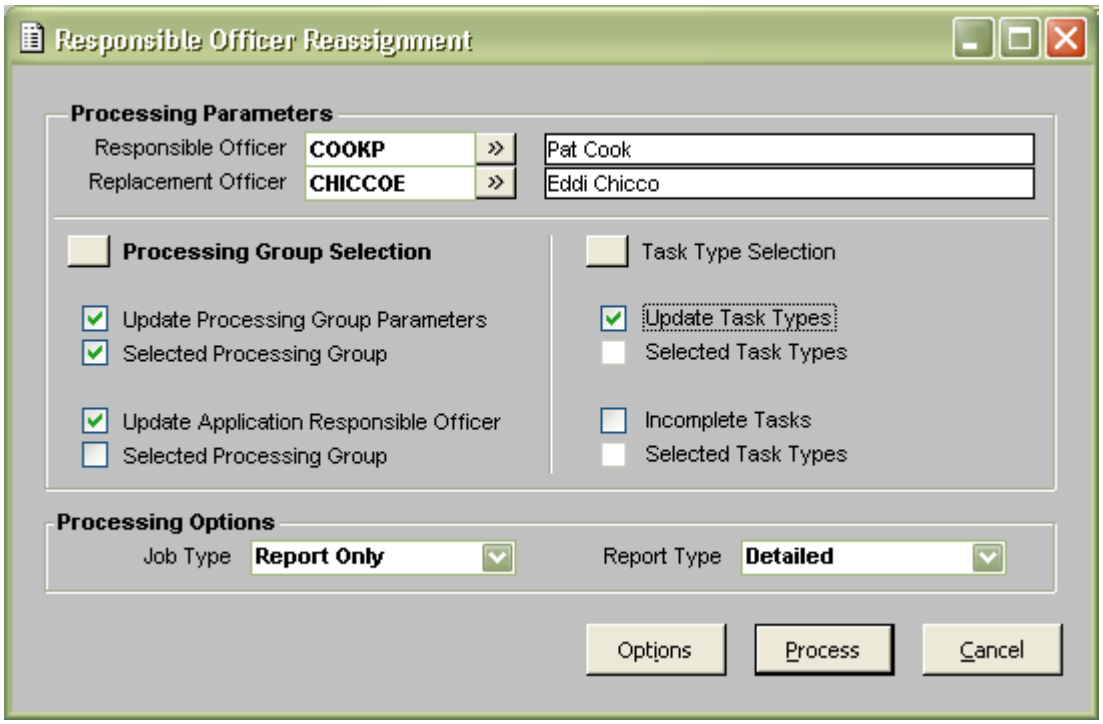
Responsible Officer Reassignment Control

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 to update the Parameters, Applications 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 for each Class can be selected by clicking this option. This will display the Processing Group Selection form where Processing Groups can be selected or removed.

Update Processing Group Parameters

When “Update Processing Group Parameters” is selected for Update then all the Processing Group Parameters will be processed. If the ‘Selected Processing Group’ option is flagged ON as well as this field then only the selected Processing Groups 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 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 nominated within the Processing Group Selection are processed.

Update Application Responsible Officer
When "Update Application Responsible Officer" is selected than all Applications with the nominated Responsible Officer will be processed and have the Replacement Officer added (if not already on the Application). If the "Selected Processing Group" option is flagged ON as well as this field then only Applications with the selected Processing Groups nominated within the Processing Group Selection and the nominated Responsible Officer are processed.

Applications with a Final Approval Decision are not processed. Each Application processed is checked and if the Application's latest decision is flagged as 'Final Approval' (set in the Application Decision or Consent Decision parameters) then the Application 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 Application Responsible Officer' option has been flagged ON and there are Processing Groups 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 Applications with the selected Processing Groups 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 Application 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.

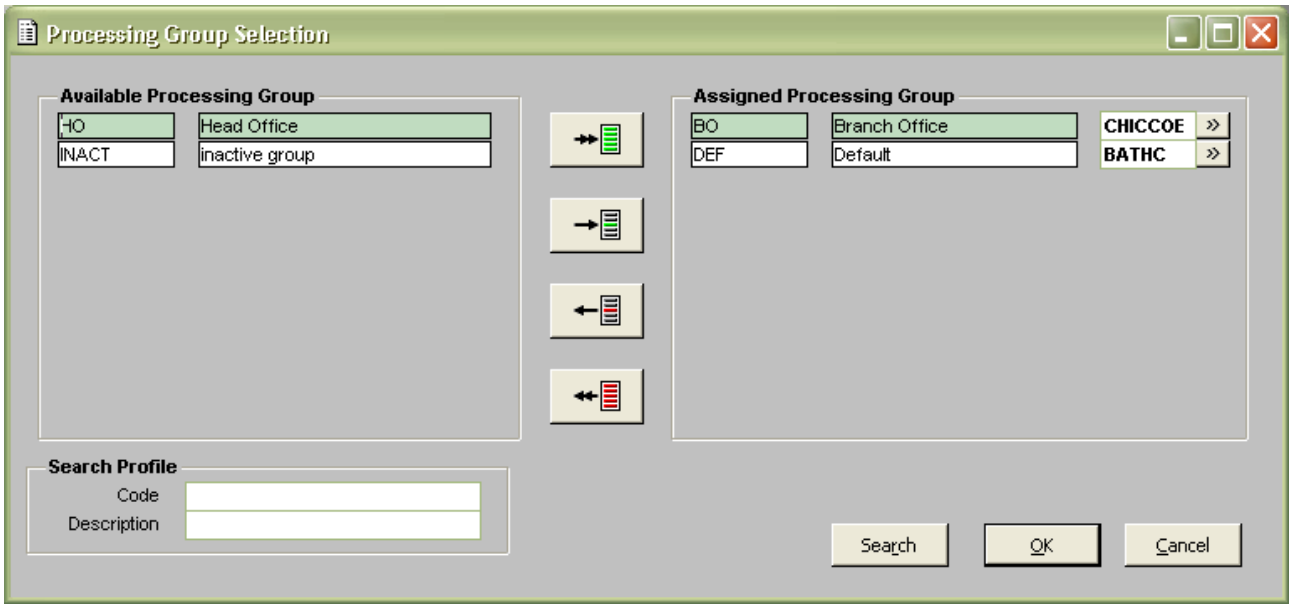
Processing Options – Report Type
The Report Type field is used mainly for the Workflow Tasks process. This will produce a report in Summary mode which will display just the Task Type and the number of Tasks to be updated. When Detailed is selected then the Report displays the full detail with regard to the Application Number, Task Type etc. that is being replaced.

Processing Group Selection

The Processing Group Selection is displayed when the Processing Group Option has been selected from the Responsible Officer Reassignment form.

This displays all the Processing Groups for the Application Class. The select/remove buttons can be used to assign or deassign the Processing Groups to be included in the update process.

Note that when a Processing Group is assigned that the nominated Replacement Officer is automatically defaulted against that Processing Group. If there is a requirement to change this Replacement Officer for just that Processing Group then the required Replacement Officer can be entered into the field.



Processing Group Selection Form

Available Processing Group
This displays the available Processing Groups for the the selected Application Class.

Assigned Processing Group

This shows the Processing Groups that have been assigned (or selected) for updating along with the Replacement Officer that will be used in the process.

Note that when a Processing Group is assigned that the nominated Replacement Officer from the Responsible Officer Reassignment display is automatically defaulted against that Processing Group. If there

is a requirement to change this Replacement Officer for just that Processing Group 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 Processing Groups is large then the Search Profile Code field can be used to refine the display. Enter in the required Processing Group 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 Processing Groups is large then the Search Profile Description field can be used to refine the display. Enter in the required Processing Group Description or part thereof and initiate a Search. The Description(s) matching the entered criteria will be displayed in the Available area.

Task Report

This report provides a list of all tasks against one or may Application records.

The report will allow the User to select Tasks that match one of the nominated criteria:

- Overdue Tasks
- All Tasks
- Completed Tasks
- Incomplete Tasks

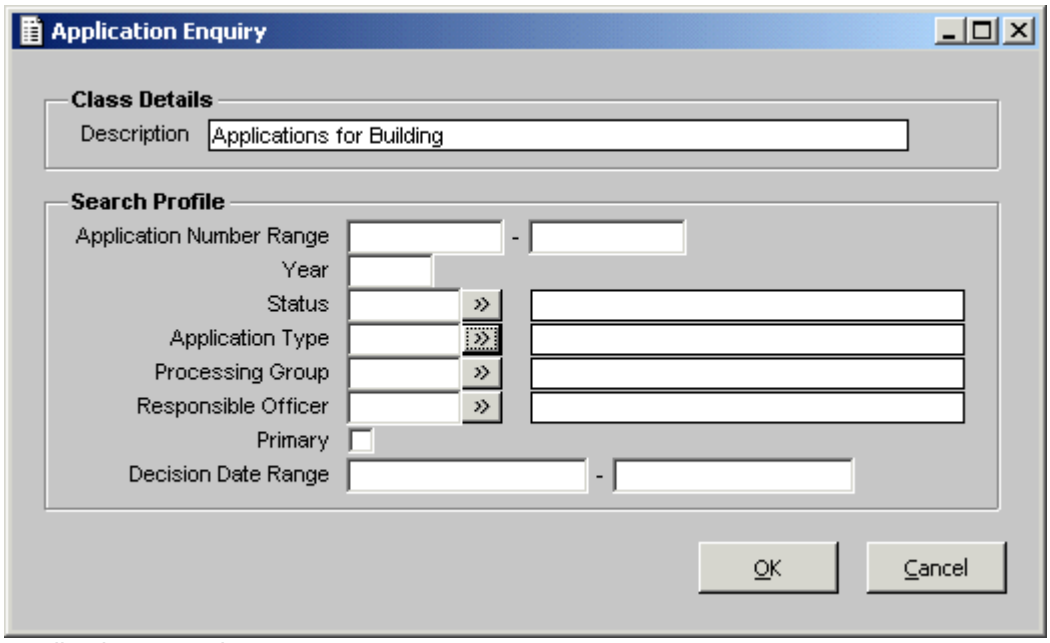
This report can be run from the Workflow Reports menu or from the Applications Reports menu.

If the report is run from the Applications Module, once a Class is selected then the Applications or Application Inspections can be selected.

The Application Occurrence field is only required if the report is to be run over a single Application record, eg a specific request number.

Selecting the External Search Profile button will present the appropriate applications' Search Profile form. Eg. Applications Enquiry Search Profile. A profile is entered and all records matching the profile will be included on the report.

Application Enquiry Form



Applications Enquiry Form

Class Detail - Description
This field details the name of the Class currently selected.

Search Profile – Application Number Ranger
The Application Number Range may be used to select a particular "from" and "to" range of Applications required for Reporting on. Enter a number in the first field and tab to the second field to enter a "to" number.

Year
The Year may be entered to limit the Report to a particular year.

Search Profile – Status

The Status is used to select the particular Status 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 Type and Click OK. Application Enquiry Screen will be returned to continue selections.

Search Profile – Application Type

The Application Type is used to select the particular Application Type required for this Report Selection.

The Application Type Pop Up Button may be used to select a particular Application Type if the Application Type Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Type and Click OK. The Applications Enquiry Screen will be returned to continue selections.

Search Profile – Processing Group

The Processing Group is used to select the particular Processing Group required for this Report Selection.

The Processing Group Pop Up Button may be used to select a particular Processing Group if the Processing Group Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Type and Click OK. Applications Enquiry Screen will be returned to continue selections.

Search Profile – Responsible Officer

The Responsible Officer 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 Responsible Officer Code is not known. Clicking on the Pop Up Button provides a list for selection. Select a Type and Click OK. The Applications Enquiry Screen will be returned to continue selections.

Search Profile – Primary

The Primary Flag is used inconjunction 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 – Decision Date Range

Entering in a Decision Date Range will return all Tasks on Applications that have Decisions within the Date Range nominated.

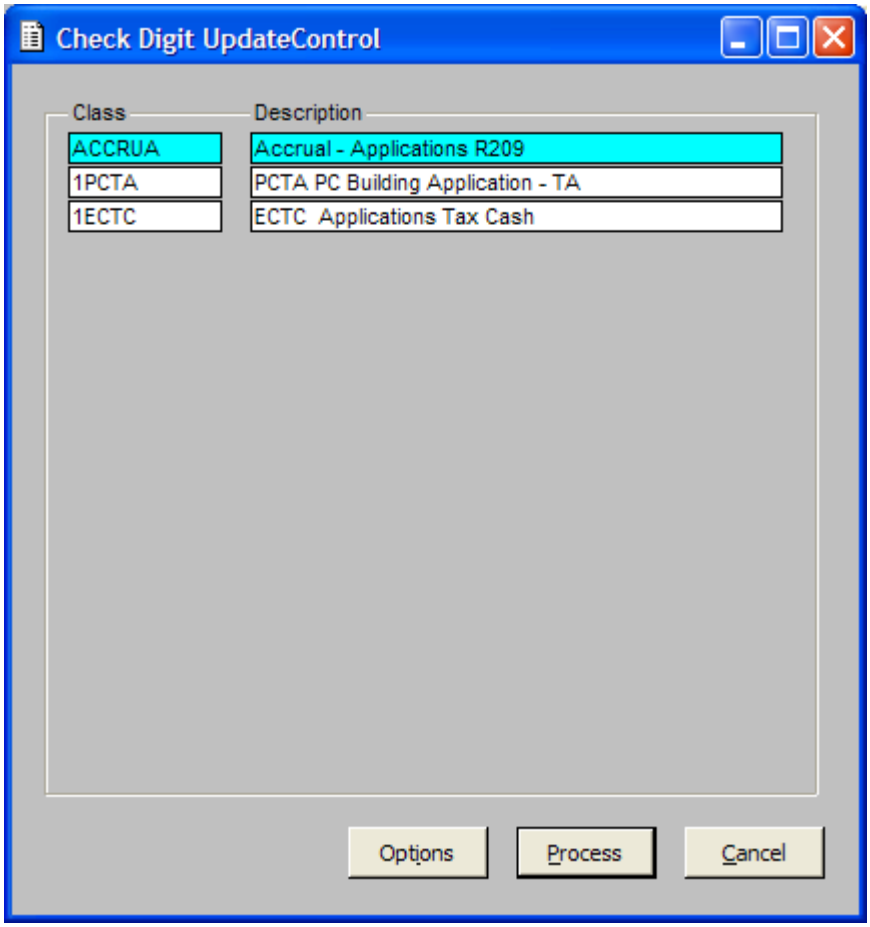
Update Applications Check Digit

Check Digit Update Control

Update Application / Licence Check Digit

This batch form is used to update the Application/Licence Check Digit. This form enables the initial calculation of the Check Digit and subsequently, the recalculation of the Check Digit in cases where banks have been changed by the council.

The Check Digit will be calculated based on the Application/Licence Reference Number and the Bank User ID using the Modulus 10 Check Digit Verification System.



Check Digit Update Control Form

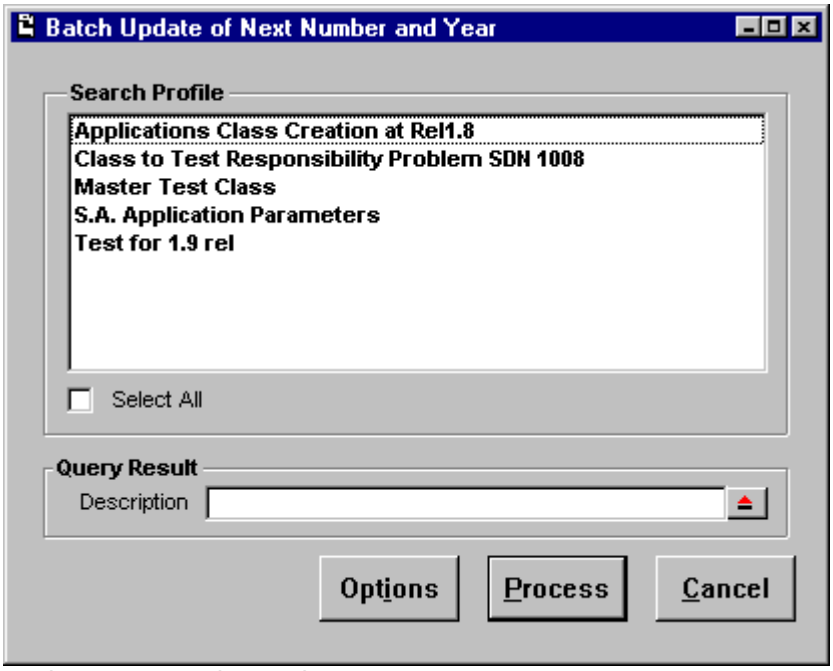
Check Digit Update Control – Class
This is the Class of Applications that will have the check digit appended to the Internal Key (Technical Primary Key) to allow for receipting using a simple numeric entry.

Check Digit Update Control – Description
This is the description of the Class selected for Check Digit update.

Update Next Number and Year

Batch Update of Next Number and Year Form

The Update Next Number and Year Option is designed to allow Applications to be created using a brand new Number and Year Series. 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 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
If this check box is selected, the all classes listed will be included when the Update option is run.

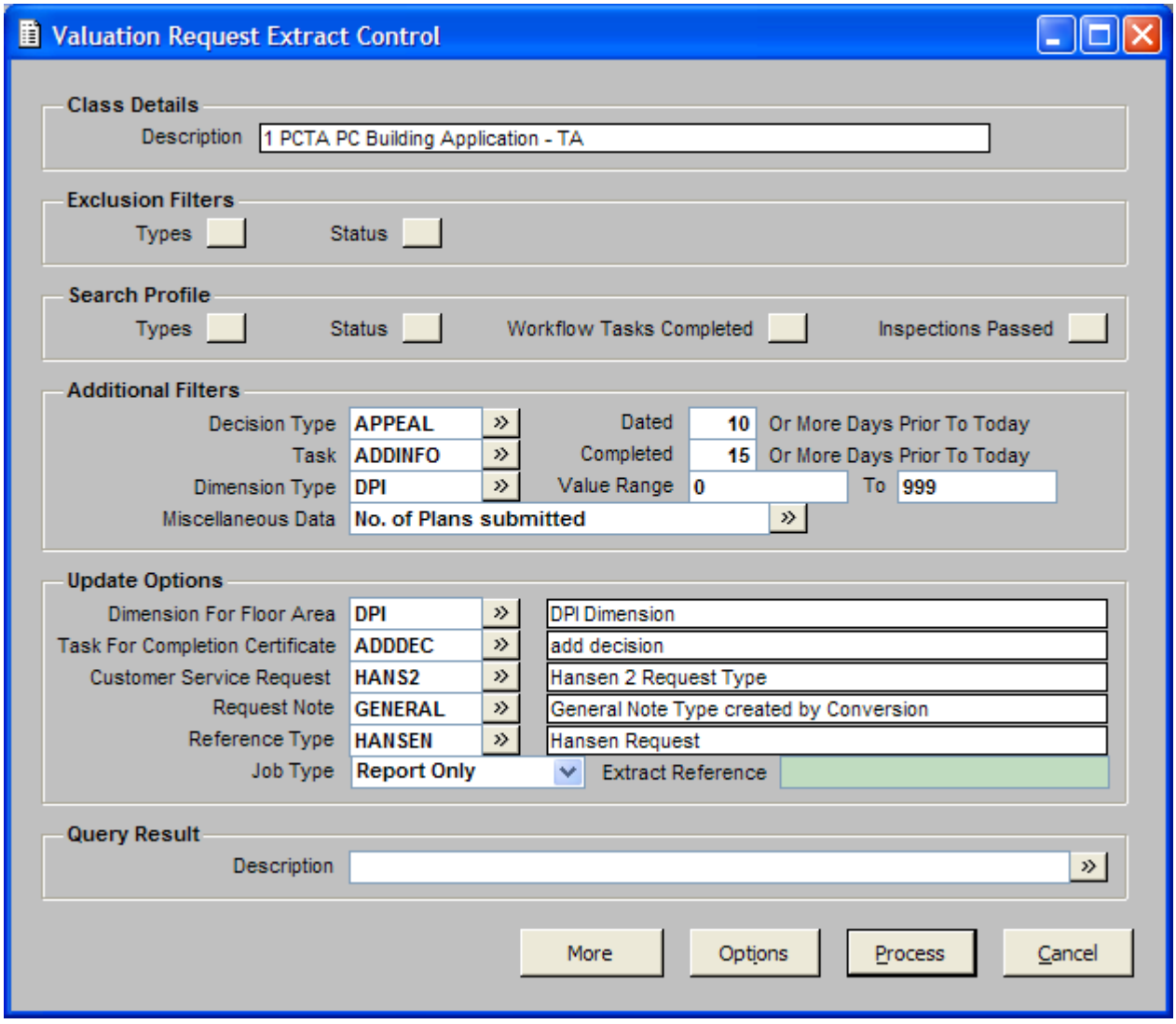
Query Result - Description
The Query Result Option may be used. The Pop Up Button may be selected to choose from any pre-defined Queries.

Valuation Request Extract Report

The Valuation Request Extract Control has been created to use information collected in the Applications Module as a trigger to providing information to the Valuation Service Provider.

Valuation Request Extract Report

A new Application Batch Control of “Valuation Request Extract Control” has been created for this process:



Parameters on this form are:

- Details of selected Class.
- Exclusion Filters which contain Types and Status. Applications will be completely ignored if they match either one of the Application Types or one of the Status Codes specified in this Exclusion Filters.
- Search Profile which contains Application Types, Application Status, Workflow Tasks Completed and Inspection Passed. Applications will be selected if they fulfil any criteria of the Application Types, Status, Workflow or Completed Inspections specified in this “Search Profile” section.

- Additional Filters which contain optional selections based on Decision, Workflow Task, a Dimension and a Miscellaneous Data field. If the criteria are set and the Application does not fulfil the criteria then it is excluded from the selection.
- Update Options contains parameters which are used to extract details for a new reporting Entity LRPAP43.
- Query Result which can be used as an alternative to the Search Profile

NOTE: The use of Exclusion Types and Statuses and Search Profile Types and Statuses should not be mixed. Ie either use the Exclusion Filters or the Search Profile Filters for Types & Statuses. Workflow Tasks Completed and Inspections Passed may be used with either filtering option.

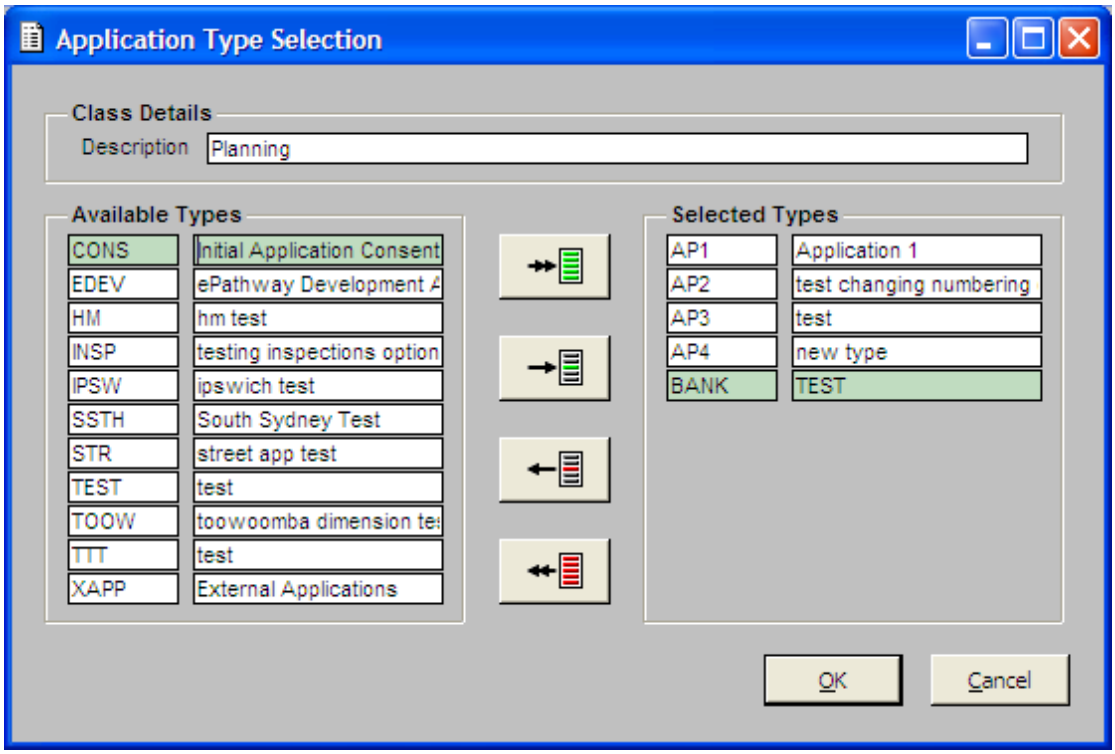
NOTE: If running the Extract nd Report in update mode any records selected and updated will not appear on a subsequent extract.

Class Details – Description
This field describes the selected Class of Application.

Exclusion Filters – Types
This field allows the User to select one or more Application Types – the Application Types selected will be ignored if they match one of the Types specified here.

Exclusion Filters – Status
This field allows the User to select one or more Status Codes – the Status Codes selected will be ignored if they match one of the Statuses specified here.
NOTE: Exclusion Filters which contain Types and Status. Applications will be completely ignored if they match either one of the Application Types or one of the Status Codes specified in these Exclusion Filters.

A Select/Remove screen is shown with Application Types related to the Class displayed which can be assigned:



Search Profile – Types
This field allows the User to select the specific matching Application Types to be included in the report.

Search Profile – Status
This field allows the User to select specific matching Statuses to be included in the report.

Search Profile – Workflow Tasks
This field allows the User to select specific matching Workflow Tasks to be included in the report.

Search Profile – Inspections Passed
This field allows for the inclusion of specific matching Inspections and related Inspection Results to be included in the report.

Additional Filters – Decision Types
This field allows for the inclusion of a matchingspecific Decision Type to be included in the report.

Additional Filters – Dated
This field allows further filtering of Decision Types that are matched and dated within the number of days prior to today to be included in the report.

Additional Filters – Task
This field allows for the inclusion of a matching specific Task Type to be included in the report.

Additional Filters – Completed
This field allows further filtering of Tasks that are matched and dated within the number of days prior to today to be included in the report.

Additional Filters – Dimension Type
This field allows for the inclusion of a matching specific Dimension Type to be included in the report.

Additional Filters – Value Range From and To
This field allows further filtering of Dimensions that are matched and fall between the values entered to be included in the report.

Additional Filters – Miscellaneous Data
This field allows for the selection of Applications that have the specific Miscellaneous Data Field applied.

Update Options – Dimensions For Floor Area
Dimension For Floor Area is used to find the same Dimension Type of the Application and uses its value to populate the “New Floor Area” of the Extract file.

Update Options – Task For Completion Certificate

Task For Completion Certificate is used to find the same Task Type in the Application. If no Task is found or a Task is found with no “Completed Date” then the “Completion Certificate” field in the Extract File is set OFF, otherwise the “Completion Certificate” field in the Extract File is set ON for found Tasks having their “Completed Date” specified.

Update Options – Customer Service Request
Customer Service Request, if not NULL, will cause a Customer Request of the nominated Request Type to be created and this Request will be linked to the Application as well as the Primary Property specified in the Application’s Location.

Update Options – Request Note
Request Note, if not NULL, will be used to create a Note in the Customer Service Request containing fields of “Estimate of Work”, Description of Work, New Floor Area, Consent Issued Date, Consent Status and Completion Certificate Issued Date.

Update Options – Reference Type

Reference Type. if not NULL, will be used to create a Reference in the Customer Service Request and the Reference Number field will be formatted with “Batch Job Number” and Formatted Application Number appended.

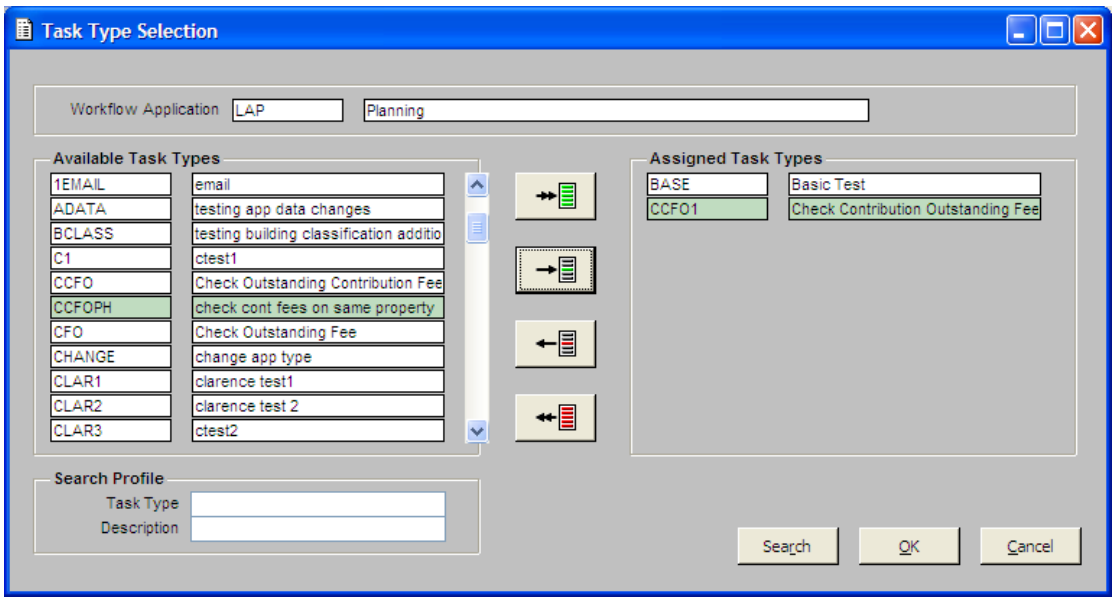
Update Options – Job Type
The User may select the option of Report Only or Update and Report. Report only does not produce an extract.

Update Options – Extract Reference
The user may add a reference which if not null will be able to be included in the export file produced from the Update and Report option of this form. The maximum length of the reference is 15 characters.

Query Result

This field allows for the selection of a Query that has been written previously or the ability to create a new query. Menu - Production >> Query >> Query Parameters >> Export/Import Format Maintenance. Refer to the Query User Guide.

Workflow Task Completed

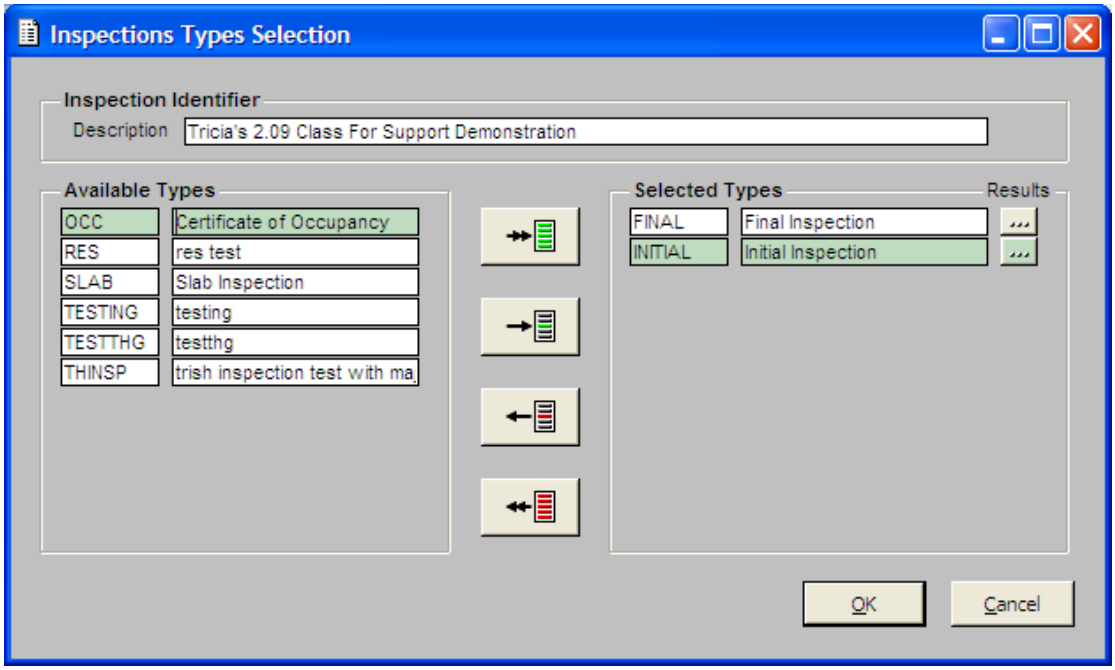


A Select/Remove screen is shown with Tasks for the Class which can be assigned.

NOTE: An Application is selected if any one of the nominated Task Types is present in the Application, and has a “Date Completed” set.

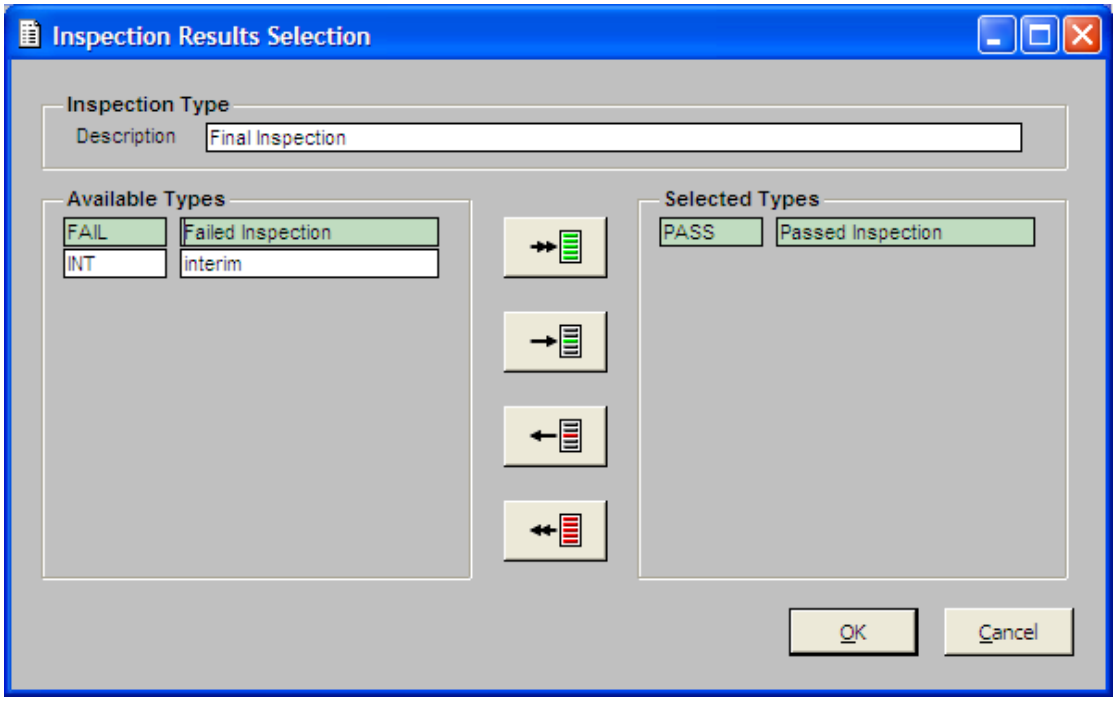
Inspection Passed

A selection of the Inspection Passed has been included in the Batch Selection (instead of setting in Inspection Parameters as specified in the Functional Specs) with a Select/Remove form of Inspection Types, accompanied by a Select/Remove form with Inspection Results related to each Inspection Type.



A Select/Remove screen is shown with Inspection Types for the Class which can be selected for entering the required Results applicable to each Type.

By clicking on the Detail Button of “Results” next to the Inspection Type, the Select/Remove form of Inspection Results for the Inspection Type is shown and Inspection Results can be selected for checking Inspections Passed.



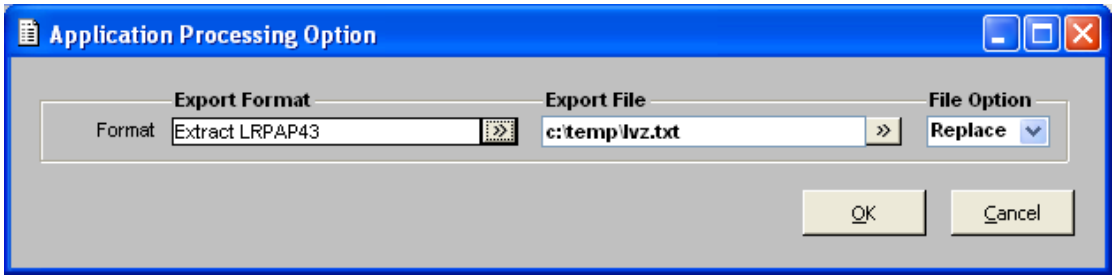
NOTE: An Application is selected if it has any one of the nominated Inspection Types and also has any one of the nominated Inspection Results in Inspections related to the Application.

Only Inspection Results that are not assigned to any Inspections can be deleted from the Inspection Parameters, so a deletion of those Inspection Results in the Parameters won’t affect a selection of Applications for the run.

Once an Inspection Result has been assigned to an Inspection in Inspection Maintenance, the Inspection Result can't be deleted from the Inspection Parameter, so the Valuation Request Extract with the current Inspection Passed set up won't be affected by the maintenance of Inspection Results Parameters.

Export Entity LRPAP43

By clicking the "More" button, a new screen is displayed for setting up an export file for the Report Entity LRPAP43.



A new Export Format is required to be created using the Menu - Production >> Query >> Query Parameters >> Export/Import Format Maintenance. Refer to the Query User Guide.

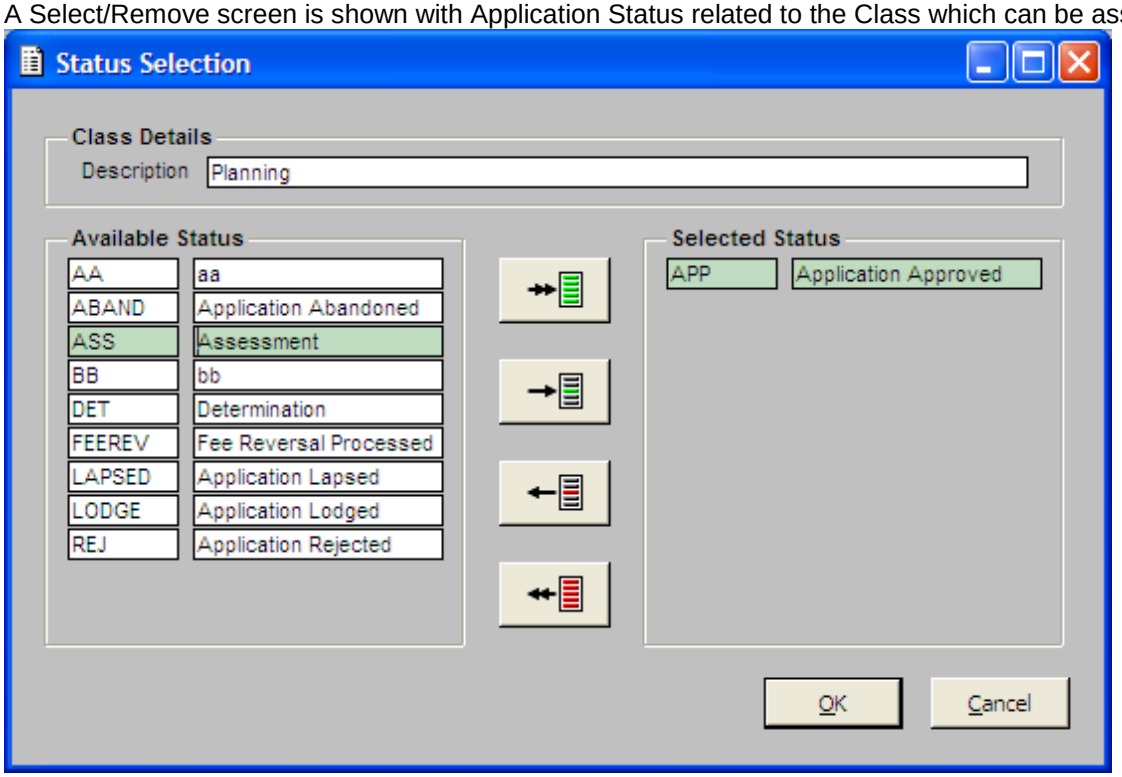
When the Extract is run in Update Mode, the Extract Records are created in the file of LRPAP43 with the following fields being available for selection:

Field Name	Attribute	Description
TPKLRPAP43		
U_VERSION		
TFKCBTSJOB		Job Run Number
TFKLRPAP01		Application Report Entity
TFKLAPAPPL		Application Internal Number
TFKACRREQU		Customer Request
TFKLVZVALU		NZ-Vals Valuation Assessment
REFERENCE	Char (15)	Extract Reference
ROLLNUM	Num (6)	Roll Number
VASSESSNUM	Num (12)	Assessment Number
SUFFIX	Char (2)	Suffix
ASSMNUMBER	Varchar	VG Assessment Number
COUNCILCODE	Varchar	Rate Authority Code
FMTNUM	Varchar	Formatted Application Number
STRHOUSNUM	Num (6)	Street House Number
LPSTREET	Varchar	Street Name
OWNERS	Varchar	Owners
ISSUEDDATE	Date time	Issued Date
DSCLAPAPPL	Varchar	Application Description
COST	Num (18)	Dimension Value
FLOORAREA	Num (18)	Dimension Value
COMPLETE	Boolean	Completion Certificate Indicator

Application Status Selection

Exclusion Filters which contain Types and Status. Applications will be completely ignored if they match either one of the Application Types or one of the Status Codes specified in this Exclusion Filters.

A Select/Remove screen is shown with Application Status related to the Class which can be assigned:



EDALA Process

The EDALA process allows for the processing of information imported for SA Planning and their EDALA interface. Three functions are available for this process

- EDALA Import: A function that will process the information file sent from Planning SA
- EDALA Take Up: A function to assist in the lodgement of an Application from Planning SA (loaded via the Import option)
- EDA:A Export: A function that will generate information to send to Planning SA

The following topics are covered in this section:

EDALA Import
EDALA Take Up
EDALA Export
Installation of the the Service

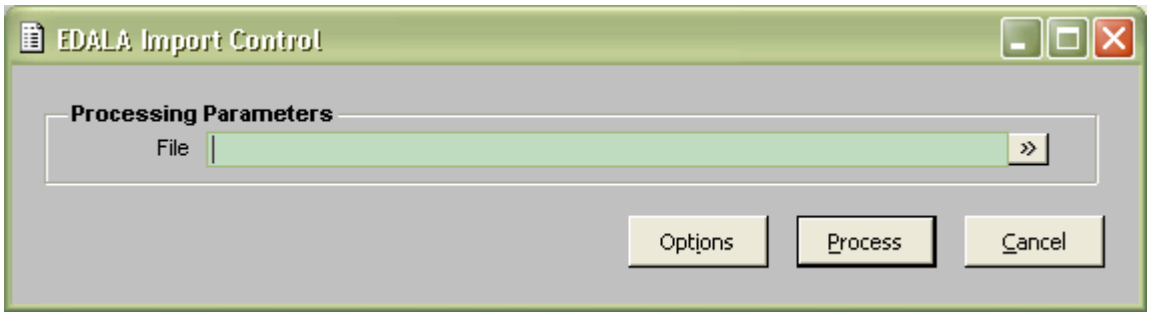
EDALA Import

The EDALA Import function takes an EDALA file in XML format and stores it in a Pathway table so that it can then be processed by the EDALA Take Up function..When using this process the required Application Class is to be nominated for the process.

EDALA Import Control Form

The EDALA Import Control form allows for the selections on the Import file from Planning SA to be nominated and uploaded into Pathway.

It requires the user to enter the file location of the EDALA Import Data File to be processed. Once processed the information is then available in the EDALA Take Up menu.



EDALA Import Control Form

Processing Parameters - File

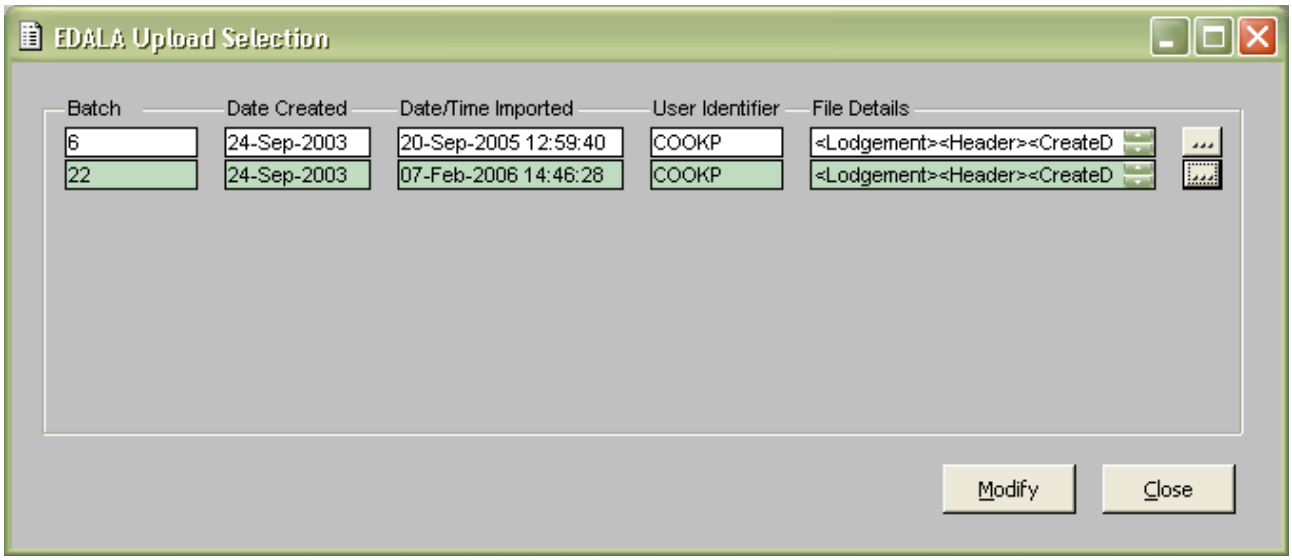
Enter in the File Path for the Planning SA Import file.

EDALA Take Up

The EDALA Take Up Menu is used to complete the update information from Planning SA into the Application Class within Pathway. Information is displayed from files that have been loaded via the EDALA Import menu.

EDALA Header Selection Form

The EDALA Header Selection displays all the imported EDALA Batch Records that have been imported into Pathway. The User can detail out against the Batch to display the information that has been provided from Planning SA or use the Modify option to update the information into the selected Pathway Application Class/Type. Once a Batch has been completely transferred to Pathway it is removed from this display.



EDALA Upload Selection Form

Batch
The Batch Number is automatically applied to the file when it is loaded via the EDALA Import menu.

Date Created
The Date Created field displays the Create Date from the Lodgement Header Record for the loaded file.

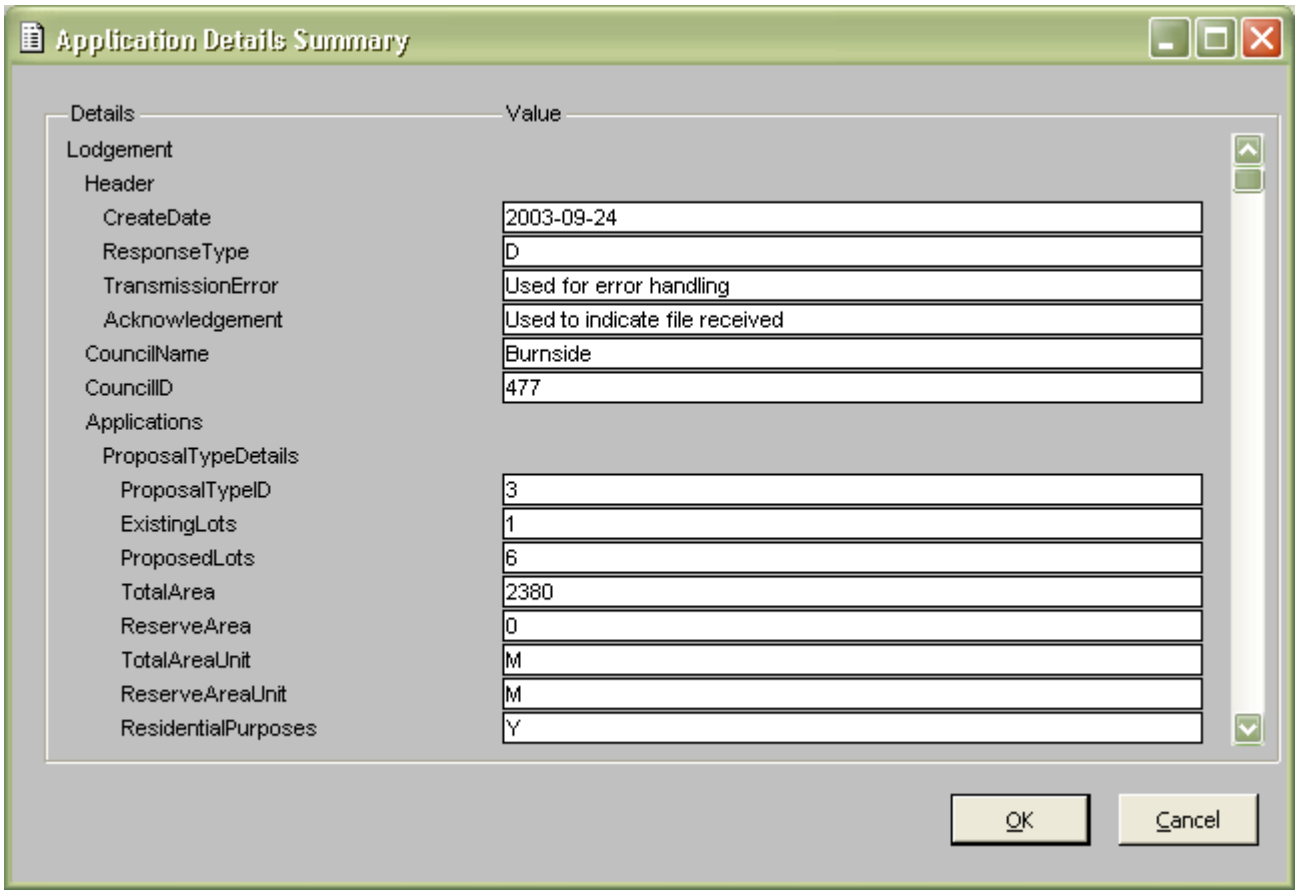
Date/Time Imported
This field displays the Date/Time that the EDALA file was loaded via the EDALA Import menu into Pathway.

User Identifier
This field displays User who loaded in the Planning SA file via the EDALA Import menu.

File Details
The File Details are shown in this field. Scroll bars are available to display more information. Or the User can use the Detail option to display the File information on the screen.

Application Details Summary Form

The Application Details Summary form is displayed when the Detail option has been selected or the Option 'EDALADetails from within Application Maintenance. This Summary information shows the detail of the information contained in the File Imported from Planning SA via the EDALA Import menu. Information on this display is non maintainable. Use the Scroll Bar to display further details. The sequence of the Information displayed may change depending on where the Detail option has been accessed.

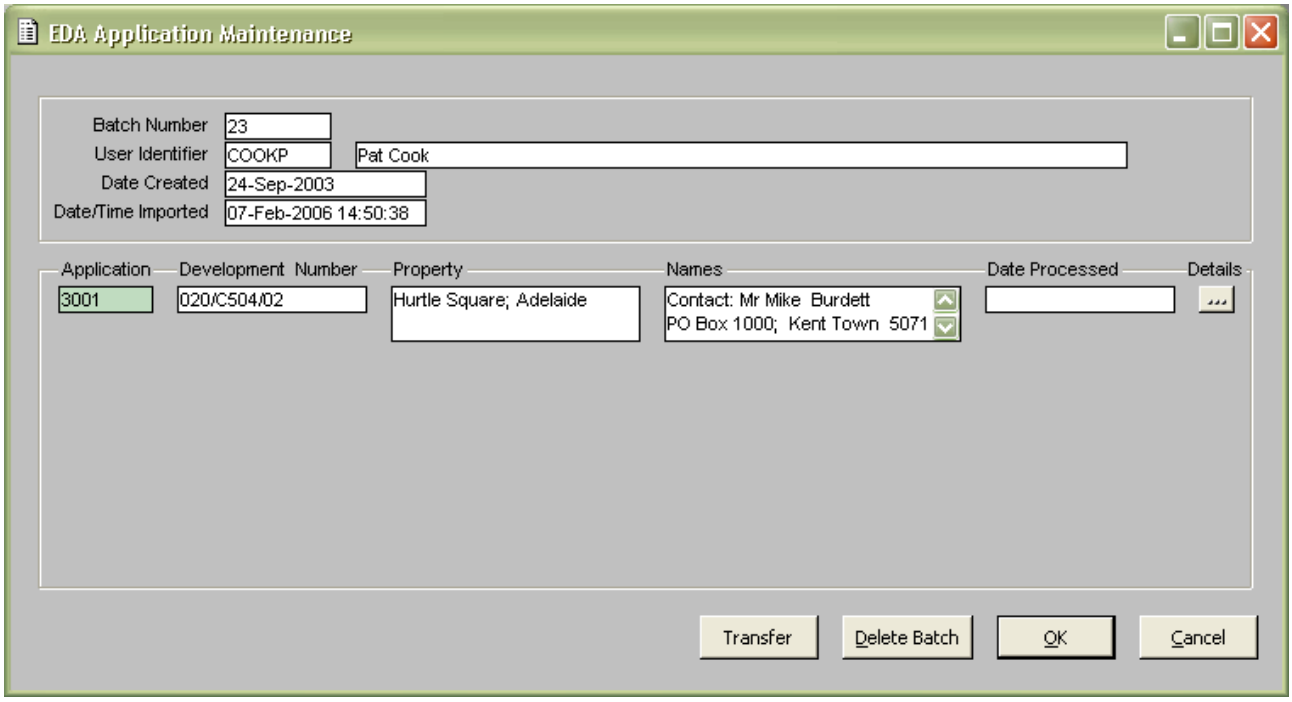


Payments Enquiry Form

Application Summary Details
The details of the Planning SA file are displayed on this form.

EDALA Application Maintenance Form

The EDALA Application Maintenance form displays the Application detail contained within the Planning SA file selected. It shows details of the Application, Development Number, Property and Names details for the Applications. A Detail option is available against each Application to display the information from the Planning SA file. Selecting the Transfer option will enable the creation of the Application into Pathway.



EDALA Application Maintenance Form

Batch Number
This is the Batch Number that was automatically assigned to the File when loaded via the EDALA Import menu.

User Identifier
This is the User who loaded the Planning SA file via the EDALA Import menu.

Date Created
The Date Created field displays the Create Date from the Lodgement Header Record for the loaded file.

Date/Time Imported
This field displays the Date/Time that the EDALA file was loaded via the EDALA Import menu into Pathway.

Application
This is the information contained in the Application section of the XML file provided from Planning SA.

Development Number
This is the information contained in the Development Number section of the XML file provided from Planning SA.

Property
This is the property information contained in the Property section of the XML file provided from Planning SA.

Names
The Names field displays the Contact, Applicant and Owner name information from the Actors section of the XML file provided from Planning SA.

Date Processed
The Date Processed is blank if the Application information has not been updated into Pathway. Once transferred to Pathway the date that it was processed is displayed in this field.

Details
Selecting the Details option will display details of the XML file from Planning SA.

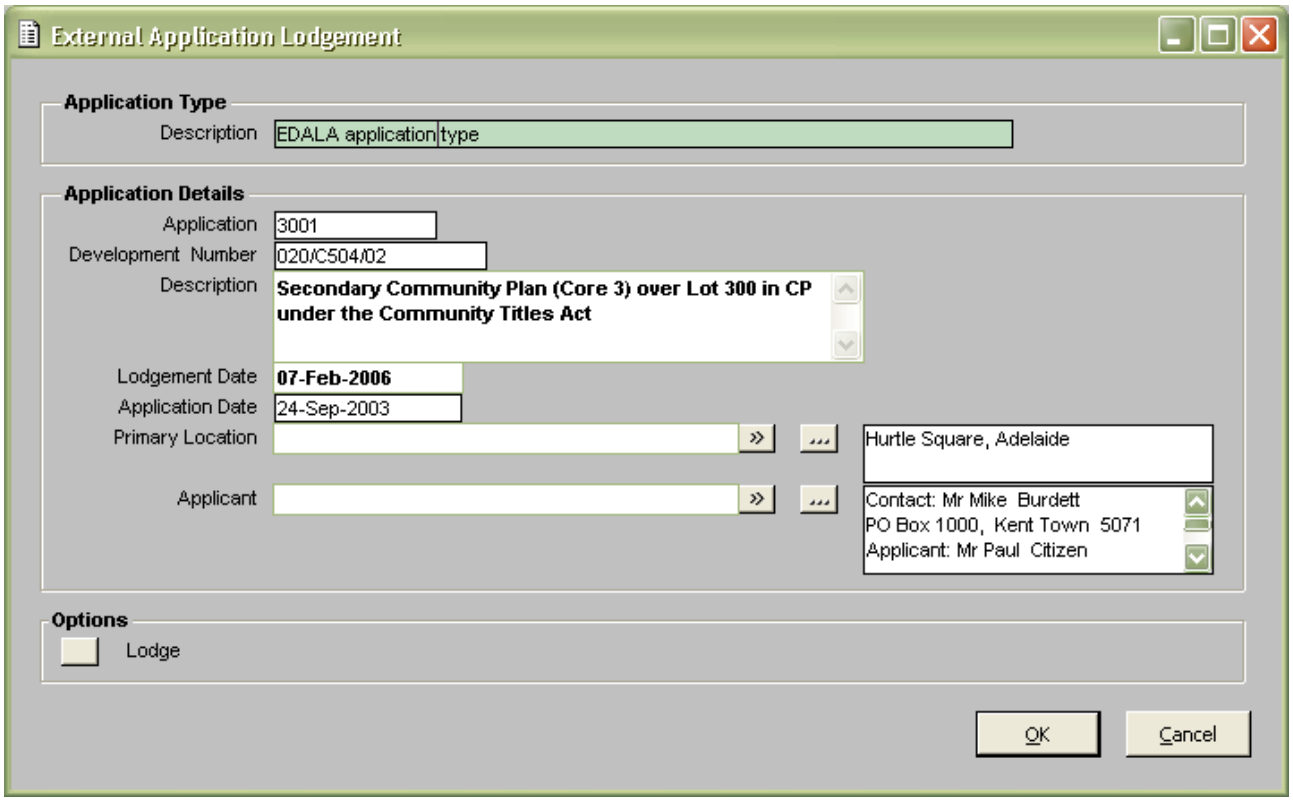
Transfer
Selecting the Transfer Option displays the External Application Lodgement form where details can be set and matched prior to the Application being Lodged within Pathway.

Delete Batch

The Delete Batch Option will Delete the Batch from the system. A message 'Do you really want to delete this EDALA Transfer Header record?' is displayed to the User. Selecting Yes will delete the record.

External Application Lodgement Form

The External Application Lodgement form is displayed when the Transfer option has been selected from the EDALA Application Maintenance display. This form allows for the selection of the required property and names information from within Pathway to be used when the Application is lodged.



External Appliction Lodgement Form

Application Type Description
The description of the Application Type selected upon entry to the EDALA Take Up menu is displayed in this field. This is the Application Type that will be used to create the Application in Pathway when the Lodge option is taken.

Application
This is the Application detail supplied on the Planning SA file for the Application.

Development Number
This is the Development Number detail supplied on the Planning SA file for the Application.

Description
The Description information is defaulted from the Planning SA file for the Application. This field can be maintained.

Lodgement Date
The Lodgement Date defaults to todays date. This can be changed if required.

Application Date
The Application Date is defaulted from the Planning SA file for the Application and cannot be changed.

Primary Location

The Primary Location is used to select the required Location for the Application to be lodged against. The Property information from the Planning SA file for the Application is displayed alongside this field. Selecting

the Pop Up option without entering in any detail in the Primary Location field will automatically set the search criteria to that of the information supplied in the file. For example if the information on the file is Hurtle Square, Adelaide then the search criteria when the Pop Up is selected will automatically default to this value. Once a Primary Location has been selected and is displayed in this field then the Pop Up option is no longer available.

If the Detail Option is selected then the Locations Maintenance form is displayed.

Applicant

The Applicatn is used to select the required Name for the Application to been lodged. The Name information from the Planning SA file for the Appliction is displayed alongside this field. Selecting the Pop Up option without entering in any detail in the Applicant field will automatically set the search criteria to the Applicant name information supplied in the file. For example if the information on the file is Paul Citizen then the search criteria when the Pop Up is selected will automatically default to this value. One the Name has been selected and is displayed in this field then the Pop Up option is no longer available.

If the Detail Option is selected then the Names Maintenance form is displayed.

Options - Lodge

Once all the details have been set then the Lodge Option can be selected to lodge and create the Application within Pathway. Upon completion of the process the created Application Number is displayed to the User and the User is returned to the EDALA Application Maintenance display where the Date Processed will be updated with today's date.

EDALA Export

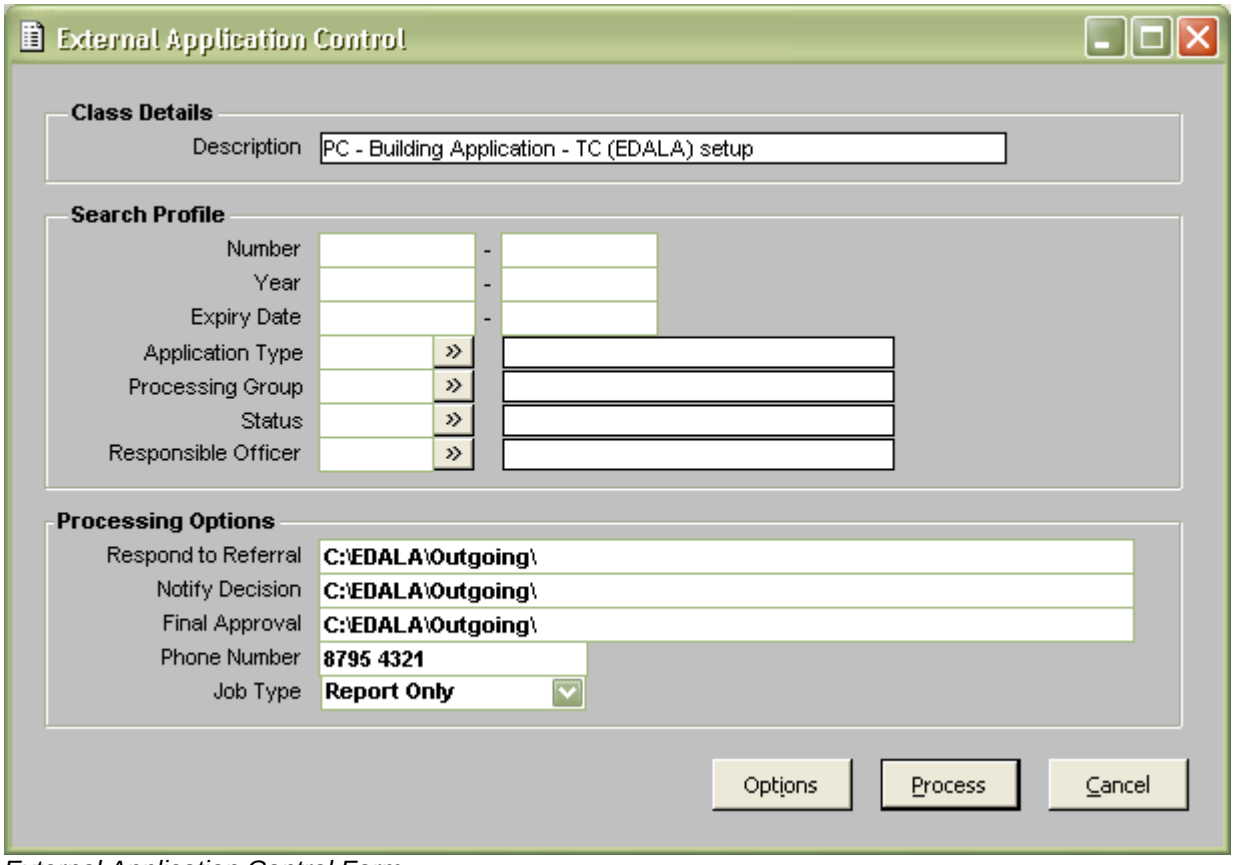
The EDALA Export Menu controls the creation of EDALA Export Files. The Search Profile behaves as a standard Pathway Application Search Profile. The EDALA file system requires the directory path only to be entered. The file name will be generated automatically according to the rules set by Planning SA. The naming convention will set the first two letters of the Respond to Referral file to be 'RR", the Notify Decision file name will be prefixed with 'ND' and the Final Approval file will have the prefix 'CA'. The date is appended onto the file.

Once the files have been generated a service running on the machine will automatically transfer the file over to Planning SA.

External Application Control Form

The External Control form allowing for the setting of the selection criteria for Application that are to be exported to Planning SA. Additionally the directory paths for the 3 XML files that are created need to be defined on the form. The Phone Number is the contact number of the council or the planning department.

Applications that have been flagged as 'Respond to Referral', 'Notify Decision' and/or 'Final Approval' and match the entered search criteria will be extracted into the appropriate report/file.



External Application Control Form

Class Details - Description
The Class Details of the selected Class is displayed in this field.

Search Profile - Number
If a particular Application or Applications are required then an Application Number range can be nominated. This criteria can be left blank.

Search Profile - Year

If a particular Year or Years worth of Applications are required then a Year or Year range can be nominated. This criteria can be left blank.

Search Profile – Expiry Date

If a particular Expiry Date or Range of Expiry Dates are required then a Date or Date range can be nominated. This criteria can be left blank.

Search Profile – Application Type

If a particular Application Type is required then the Application Type required can be nominated in this field. The Pop Up can be used to display a list of available Application Types. This criteria can be left blank.

Search Profile – Processing Group

If a particular Processing Group is required then the Processing Group required can be nominated in this field. The Pop Up can be used to display a list of available Processing Groups. This criteria can be left blank.

Search Profile – Status

If a particular Status is required then the Status required can be nominated in this field. The Pop Up can be used to display a list of available Status. This criteria can be left blank.

Search Profile – Responsible Officer

If applications for a particular Responsible Officer are required then the Responsible Officer can be nominated in this field. The Pop Up can be used to display a list of valid Officers. This criteria can be left blank.

Processing Options – Respond to Referral

The Respond to Referral only requires the directory path and not the file extention. The file name will be generated automatically according to the rules set by Planning SA. For the Respond to Referral this will be 'RR' with the date appended on to the file.

Processing Options – Notify Decision

The Notify Decision only requires the directory path and not the file extention. The file name will be generated automatically according to the rules set by Planning SA. For the Notify Decision this will be 'ND' with the date appended on to the file.

Processing Options – Final Approval

The Final Approval only requires the directory path and not the file extention. The file name will be generated automatically according to the rules set by Planning SA. For the Final Approval this will be 'CA' with the date appended on to the file.

Processing Options – Phone Number

The Phone Number is the contact number of the Council or the Planning Department.

Processing Options – Job Type

The Job Type is defaulted to Report Only upon entry to the form. This can be changed to Update and Report. Report Only will produce a Report displaying the Applications that will be extracted into the XML files. When processed in Update and Report mode the XML files are produced, the Report produced and the Applications updated so that the flags on the Application Data display are unticked so as not to be included in the next process.

Installation Of The Service

The following details the steps required to install the EDALA service.

Installation of the EDALA Service

The following web site will provide details of how to set up the EDALA services required to import and export files to Planning SA. This installation software can be downloaded from:

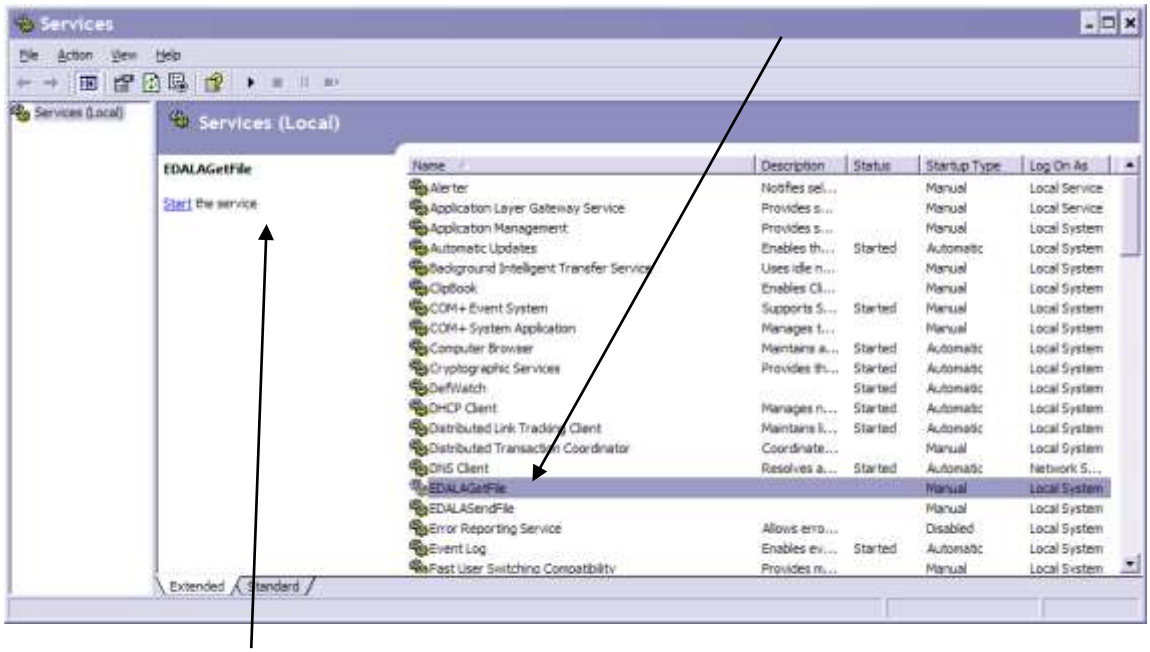
http://www.lga.sa.gov.au/goto/edala

When loaded, the Services can be started by going into

Go Start > All programs > Administrative Tools > Services

Please note: If the Administrative Tools menu is not available on your machine then 'right click' the Start button > Properties > Customize... > Advanced Tab > scroll to the bottom of the list and under System Administrative Tools click 'Display on the All Programs menu'.

Once you are in the Services (local) screen, locate the EDALAGetFile service.



Click Start the service

EDALASendFile can also be started the same way.