Pathway
RELEASE NOTES

Enhancements

3.10.008

infor

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

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Pathway Release 3.10.008

Table of Contents

Introduction

This document describes enhancements and new functionality made available in Release 3.10.008 of the Pathway software.

This Release Notes document is also available for viewing from the Release Notes menu option included in the Help Menu.

Included in this document are the following sections:

User Guides and Online Help
This includes an overview of how to access Pathway Help (both online and in printable format), as well as a listing of all the Modules included.

Modules
Each module that has undergone modifications is included in this documentation. The documentation is now contained in separate documents as follows:

- Infor Pathway Release Notes 3.10.008 Enhancements.pdf
- Infor Pathway Release Notes 3.10.008 Fixes and Software Corrections.pdf

If there are no details under any of these headings for a module, then that module will be omitted entirely.

InforXtreme Incident Index
This includes a listing of the InforXtreme Incidents addressed in this release of software, in alphabetical order with their associated page number.

DRN Index
This includes a listing of the Development Requests (DRNs) addressed in this release of software, in numerical order with their associated page number.

KB Index
This includes a listing of the Knowledge Base Articles (KBs) addressed in this release of software, in numerical order with their associated page number.

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User Guides and Online Help

All Pathway modules are supported by on-line help text which is accessed by pressing the F1 key within any field on a form. In addition, help text for all modules is also available from the Contents option within the Help Menu. This can be accessed from any form within Pathway.

Complete User Guides based on the Help Text may also be printed in hard copy for each module. To access the PDF versions of the User Guides, the following steps should be performed:

- The User Guides are stored in PDF format and therefore require that Adobe Reader be available to access them.
- The User Guide can be viewed or printed, but cannot be modified.
- Check with your system administrator for instructions on where to find these documents on your system.

The User Guide documents are stored in the following directory path in the following format e.g. ACR.pdf:

e.g.
XXX \ hlp\ABK.pdf

ABK	(Bookings Management)	CTX	(Tax)
ACR	(Customer Service)	CWF	(Workflow)
CAR	(Accounts Receivable)	CWP	(Word Processing)
CAU	(Auditing)	CWS	(WorkSmart)
CBT	(Batch Processing)	ESY	(ePathway)
CCL	(Calendar)	HowtoUse	(How To Use)
CCP	(Customer Profile)	LAN	(Animals)
CDC	(PaperClip Attachments)	LAP	(Applications)
CEM	(e-mailing)	LCN	(Conditions)
CFI	(General Ledger)	LDR	(Debtors)
CIF	(Core Interface)	LER	(Electoral Roll)
CIM	(InfoMart)	LIF	(Infringements)
CMN	(Menu System)	LIN	(Inspections)
CMO	(Memo)	LLC	(Licensing)
CNA	(Name and Address)	LPA	(Property Accounting)
COR	(Responsibility)	LRA	(Rates)
CQY	(Query)	LTW	(Trade Waste)
CRC	(Receipting)	LVL	(Valuations)
CRF	(References)	LVV	(Victorian Valuations)
CRG	(Registers)	LVZ	(New Zealand Valuations)
CSY	(System)	LWB	(Water Billing)

Accounts Receivable Interface

Enhancements

Accounts Receivable Interface

InforXtreme Incident: COGC 10416631;	DRN: 30197	Fix: 03107007;
THICK CLIENT;	KB:	

DEBTOR IMPORT

The Debtor Import batch process has been modified to reduce the processing time and memory requirements when importing a very large number of records. There has been no change to functionality.

Animal Registration

Enhancements

IMPORTANT NOTICE for Pathway Release 3.10.008

With the release of Pathway 3.10.008 the Animal Registration module will **no longer be available for the Thick Client.** This is due to the large number of changes required to support new functionality requested by our customers. Where there is no pre-existing Smart Client form for a function then the Thick Client will still be used. For example: Animal Renewal.

With the release of Pathway 3.10.008 the Receipting module will no longer be able to receipt to Animals using the Thick Client.

Animal Maintenance

InforXtreme Incident:	DRN: 30028	Fix: 03107010;
SMART AND THICK CLIENT;	KB:	

ANIMAL MAINTENANCE

Two optional fields have been added to the Animal Maintenance and Animal Enquiry forms in the smart client. *External Reference* holds a reference number of up to 25 characters pertaining to an external organisation such as a dog club. *Notes* holds up to 250 characters of free-format text relating to the animal, such as alternative contact details.

The new fields are available as extract fields, *Animal_External_Reference* and *Animal_Notes* respectively, for use within Animals merge types. They have also been added as items within the DATASTRING field on the Animal Renewal export table, LRPAN07. The DATASTRING items can be added to existing Animal Renewal export files by using Animal Registration >> Animal Parameters >> Export Data String Maintenance and selecting *External Reference* or *Notes*.

Animal Renewal Control

InforXtreme Incident:	DRN: 30028	Fix: 03107010;
SMART AND THICK CLIENT;	KB:	

ANIMAL RENEWAL CONTROL

Two fields, OWNEMLADDR (*Owner E-mail Address*) and OWNPREFDLM (*Owner Preferred Delivery Method*), have been added to the Animal Renewal export table, LRPAN07. These are available for selection within Export/Import Format Maintenance, and both relate to the first listed owner against the relevant animal(s).

The *Owner E-mail Address* field contains the e-mail address of the owner, which is the first communication detail against the name that matches the appropriate e-mail communication type (personal or company) specified in Name and Address Register >> Name and Address Parameters >> Communication Type Parameters. The *Owner E-mail Address* field will be empty unless the first owner has an e-mail address; any subsequent owners of an animal are not checked.

The *Owner Preferred Delivery Method* field contains the preferred document delivery method of the owner, and is a single-character code corresponding with one of the valid role-level preferred delivery methods; 'E' for E-mail, 'F' for Fax, or 'P' for Post. If the preferred delivery method has been overridden against the relevant owner role record, the code will correspond with that value; otherwise, the code will correspond with the preferred delivery method at the identity level, with 'P' the default.

Animal Release Notes

InforXtreme Incident: KNOX 1344499; WODO 1562422; GLEN 1570410; MBRC 5286255; MBRC 8608172; LOGA 7728170; LOGA 7725020; IPSW 9010327; SMART AND THICK CLIENT;	DRN: 26035 KB:	Fix:

Functional Overview

To accommodate for multiple payments for a Registration Period and the ability to Refund overpaid registrations, the principle change to the Animal Registration module is the introduction of an Animal Registration Transaction Table.

The Animal Registration Record (LANREGO) essentially remains unchanged however behind each Registration will be transactions.

Rather than just record Receipt Details as transactions the specification has also incorporated ‘Fee’ transactions. The balance of a Registration will be the sum of these Transactions.

There will only be one Registration Line per Period. Even Replacement Discs will show as a transaction under the Registration Details.

All of this should provide for more transparent processing of the animal registration record and easier adjustment functionality for staff.

ANIMAL	REGISTRATION PERIOD	REGISTRATION PERIOD TRANSACTIONS	
Watson the Border Collie	2015 Disc - 1234	Renewal Fee Discount Receipt	$75.00 $20.00CR $55.00CR
	2014 Disc - 3456	Renewal Fee Adjustment (now desexed) Receipt	$100.00 $25.00CR $75.00CR

Animal Security Maintenance

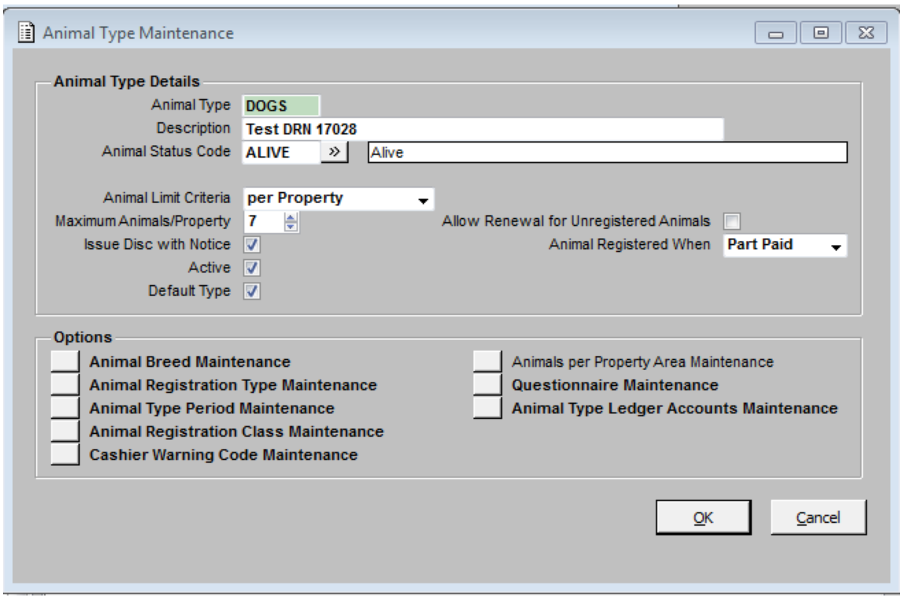
Menu: Animal Registration >> Animal Parameters >> Animal Security Maintenance

A new secured function has been added:

REFUNDS Perform Animal Refunds

This option will is used to nominate Users who can perform Refunds in Animal Maintenance.

Animal Type Maintenance



A new dropdown labelled “Animal Registered When” will be added to each Animal Type.

There are two drop down values:
- Fully Paid
- Part Paid

The Registered flag on the Animal and the Registration will be set ON/OFF as determined by this flag as transactions are posted against Registration Periods.

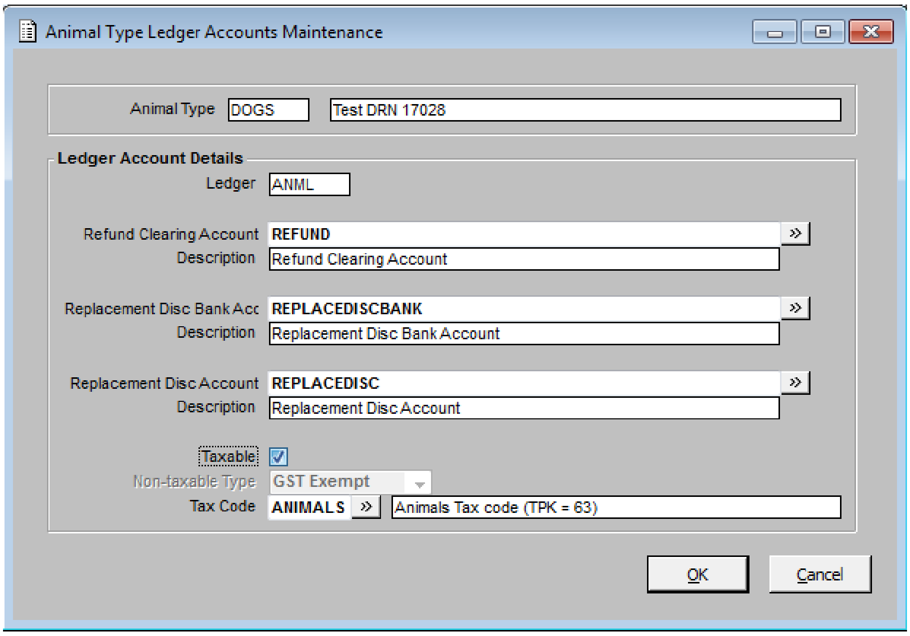
For example, if the setting is set to “Part Paid, then once a customer pays any amount against the registration then the Animal Record will be flagged as ‘Registered’.

Conversely, if the setting is set to “Fully Paid”, then the registration must be paid in full before the animal is considered “Registered”.

Changing the value of this dropdown will NOT automatically update Animal or Registration records. There is a batch process that can be run to reset these. Refer to Batch Processing for further details.

Animal Type Ledger Accounts Maintenance

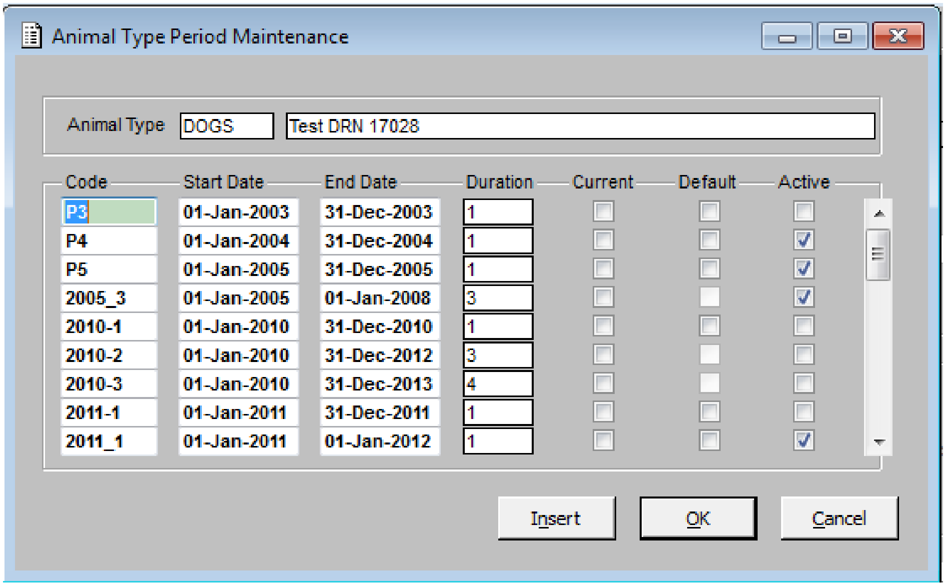
A new option “Animal Type Ledger Accounts Maintenance” has been created to maintain ledger accounts at the Animal Type level.



This new option includes the Tax details (previously on the Animal Type Maintenance form) and the new Accounts for:-

- Refunds Clearing Account
- Replacement Disc Bank Account
- Replacement Disc Account

Animal Type Period Maintenance



These new parameters have been taken from the Animal Registration Class parameters.

Previously a Period Code could be linked to an Animal Classification with one or more Durations and was designed to handle multi-year Periods i.e. 3 year registrations etc.

These new parameters will make the implementation of multi-year registrations much simplier.
For example:

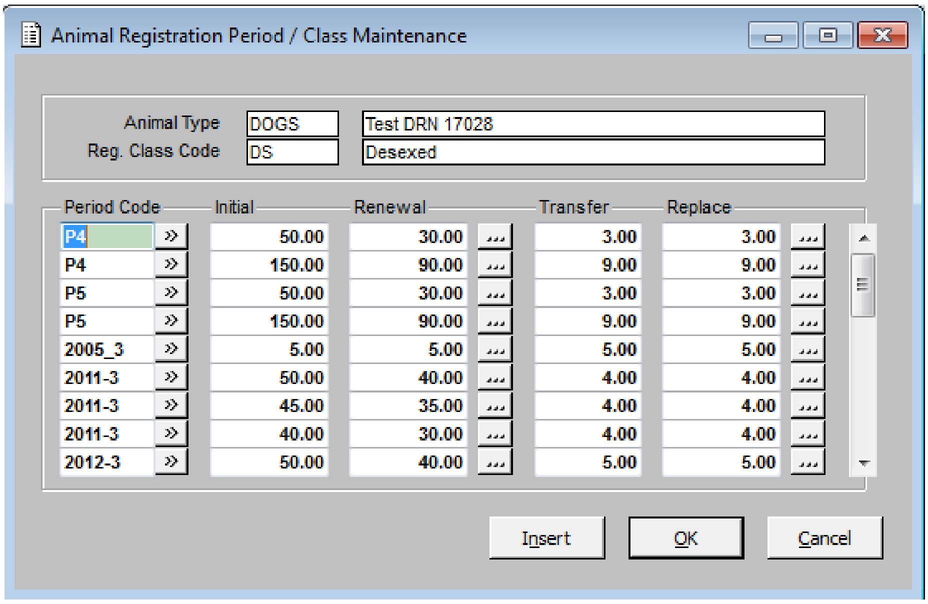
Period Code	Description	From To Date	Duration
2015	One year registration	01/7/2015 to 30/6/2016	1
2015_3	Three year registration	01/7/2015 to 30/6/2018	3
2015_5	Five year registration	01/7/2015 to 30/6/2020	5
2015_L	Life Time registration	01/7/2015 to 30/6/2045	30

The 'End Date' for a lifetime Disc is just a date that means the Animal will never be selected for renewals in it's lifetime.

The Duration is calculated from the Start and End Dates automatically.

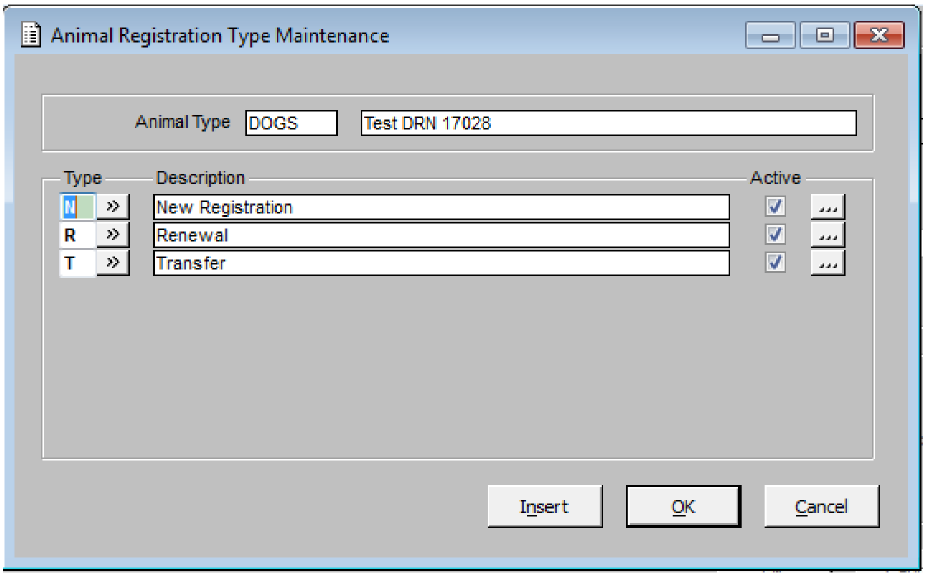
Multiple current Periods are allowed BUT they must all have the same 'Start Date'. (This flag was previously on the Registration Cost form.)

Registration Period / Class Maintenance



This form replaces the Registration Cost Maintenance form. The Duration column has been removed. Registrations that span multiple years are defined on the Period parameter.

Animal Registration Type Maintenance



The Registration Types determine what type of Registration is being recorded. Only the following three values are valid.

N – New Registration
R – Renewal
T – Transfer

Each Registration Type will have its own unique set of General Ledger Accounts as currently defined (use the ‘Detail’ button against each ‘Type’ to see the General Ledger Accounts).

Currently there are 4 other Registration Types i.e.

A Adjustment
I Instalment
P Replacement
V Reversal

It is possible that these old Registration Types exist on Registration Records. They will be displayed but will not be available for future use.

The Registration Type **‘Adjustment’** is now a Transaction Type and the Accounts used depend on the Registration Type that the adjustment applies to.

The Registration Type **‘Instalment’** was never implemented in the Animals module and is covered by allowing multiple payments against a Registration Period.

The Registration Type **‘Replacement’** is now a Transaction Type and the Accounts used are defined on the Animal Type parameter i.e. Animal Type Ledger Accounts’

The Registration Type **‘Reversal’** is now a Transaction Type and the Accounts used depend on the Registration Type that the reversal applies to.

Transaction Types

A new parameter has been created to hold the various Transaction Types that can be applied to a Registration Line.

This parameter will be released as initial data and should not be maintained.

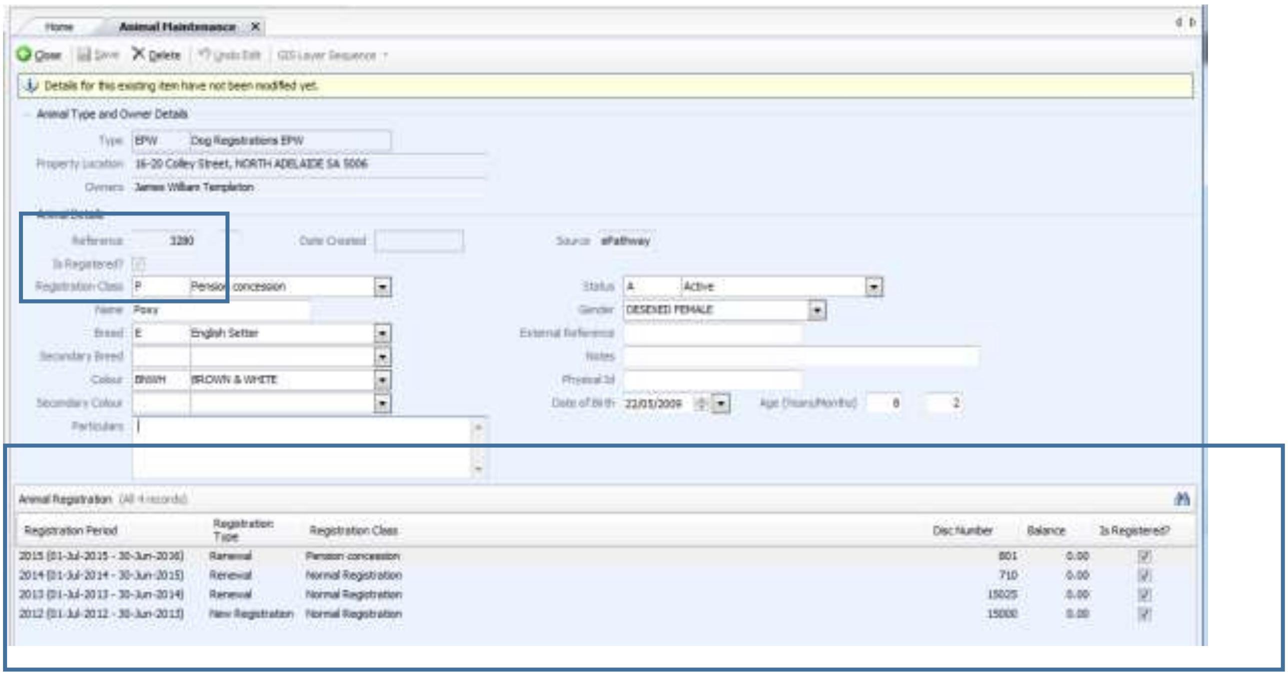
System Administration >> Animal Parameters >> Registration Transaction Maintenance

The Transaction Types are:-

Code	Description	Category	Ledger Transactions generated
FEE	Fee	Fee	No
DISC	Discount	Fee	No
PROR	Pro Rata	Fee	No
PEN	Penalty	Fee	No
REP	Replacement Disc	Fee	No
ADJ	Adjustment	Fee	No
RCPT	Receipt	Receipt	Yes
RCPT-R	Reversal	Receipt	Yes
RCPT-I	Receipt Transfer In - Receipting	Receipt	Yes
RCPT-O	Receipt Transfer Out - Receipting	Receipt	Yes
RTFR-I	Receipt Transfer In	Receipt	Yes
RTFR-O	Receipt Transfer Out	Receipt	Yes
REF	Refund	Refund	Yes

Code	Description	Category	Ledger Transactions generated
REF-R	Refund Reversal	Refund	Yes
DISC-R	Discount Reversal	Fee	No
PEN-R	Penalty Reversal	Fee	No

Animal Maintenance



The Registration Details are now displayed on the Animal Maintenance form.

A new field has been added labelled “Is Registered?” This flag denotes whether the Animal is registered.

Is the Animal Registered?

Every Registration Record has an ‘Is Registered’ flag which means that the Animal is registered for that Period but is the Animal Registered?

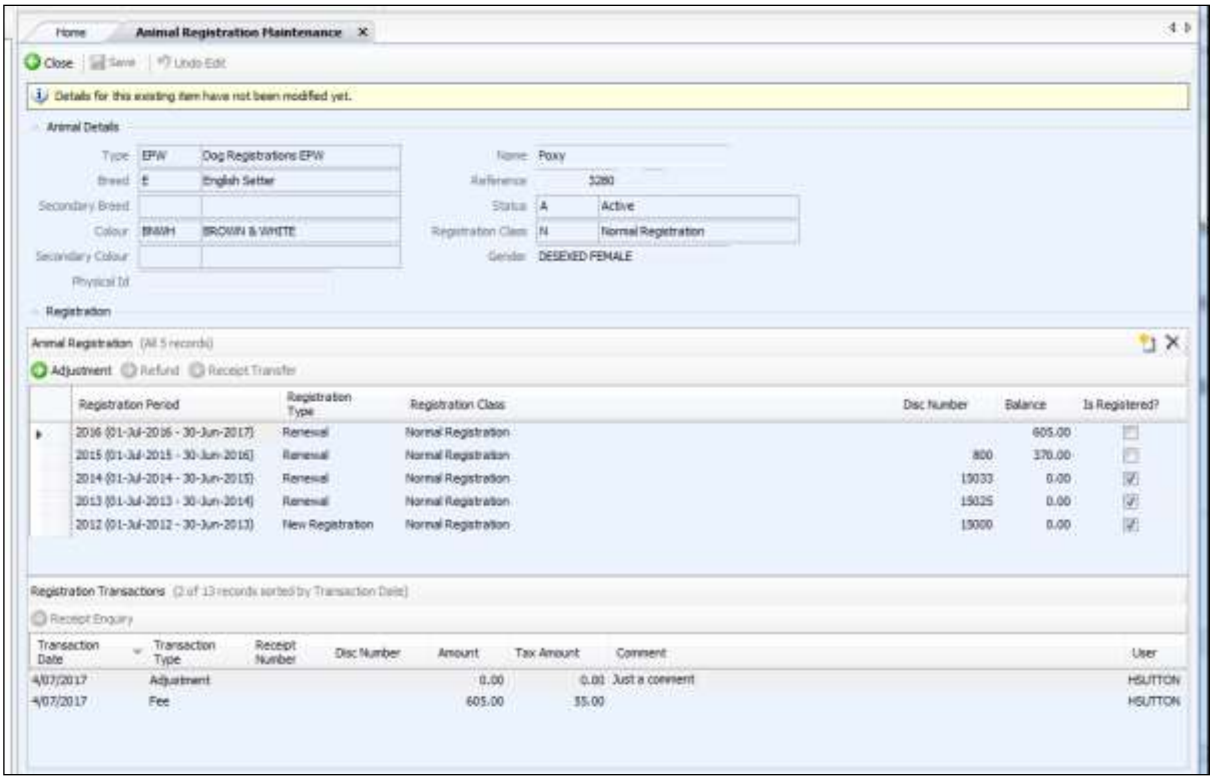
The Animal is currently registered when the last Registration Record that has the ‘Is Registered’ flag ON has an ‘End Date’ of its Period is greater than or equal to today’s date then the Animal is registered.

The flag is maintained with any process that creates transactions against Registrations e.g. Receipting, Registration Maintenance etc.

This flag is set per the setting at the Animal Type level (Animal Registered When Fully Paid / Part Paid).

A batch process has been provided to re-set the ‘Is Registered’ flag if required.

Registration Maintenance



This form displays the Animal Registration details for maintenance. The order of the Registrations is descending Period order i.e. latest Period first.

The Registration Transactions section displays the Transactions for the Registration Period that has focus.

The Insert Button can only be used to insert a new Registration for any active Registration Period not already linked to the Animal. This new Registration Period has the following defaults:

- Defaults to the Animals Registration Class
- Defaults to Registration Type of ‘Renewal’

The Delete Button can be used to delete a Registration that has no Receipt Transactions. All the other fields are display only on the form.

Adjustment Entry

There is an ‘Adjustment’ option that allows the following fields to be maintained:

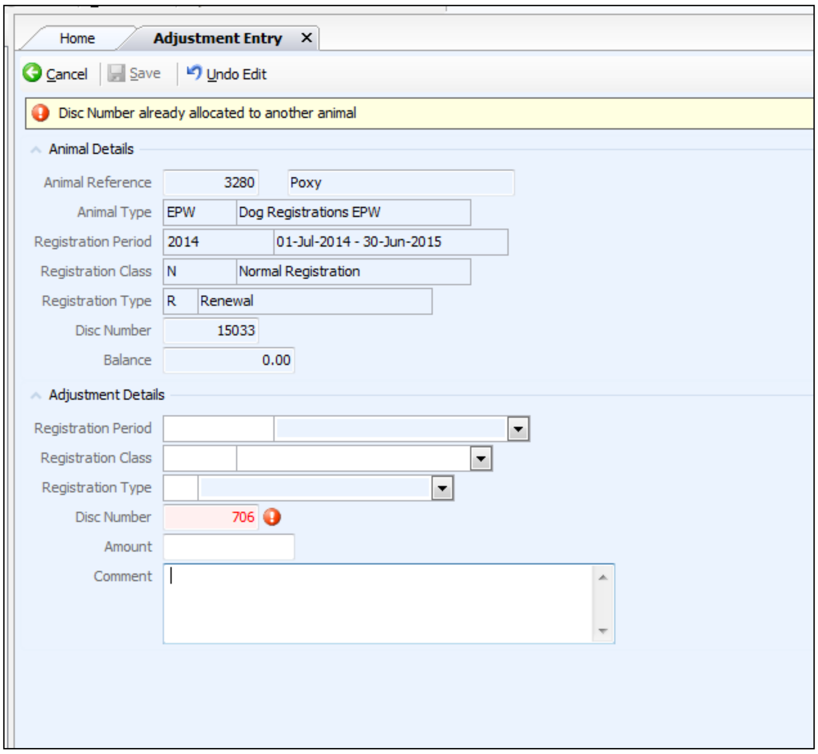
- Period
- Registration Class
- Registration Type
- Disc Number
- Amount

Each of these changes will generate an ‘Adjustment’ Transaction. These Transactions may or may not include an ‘Amount’.

Only the value being adjusted needs to be entered i.e. if this is a change of Disc Number then only the new Disc Number needs to be entered.

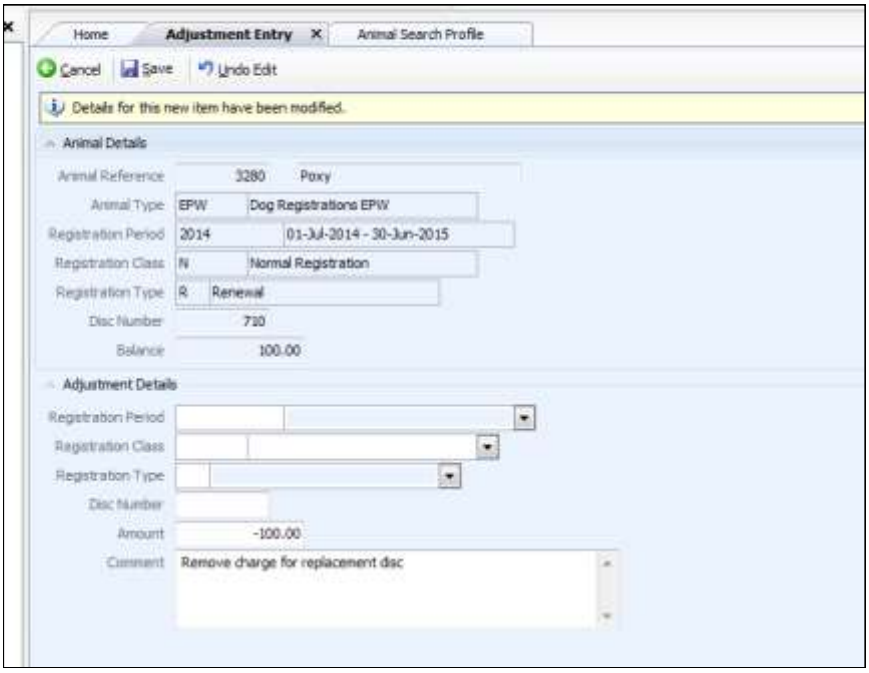
Issue disc via Registration Maintenance

In this example a new disc number has been entered.
Pathway has issued an error message stating that the disc has already been issued.



When a valid disc is entered Pathway will update the Registration record with the new disc number and a transaction will be created with the new disc number and the appropriate charge (if any).

If the customer is not to be charged for the replacement disc then an adjustment may be made as shown below.

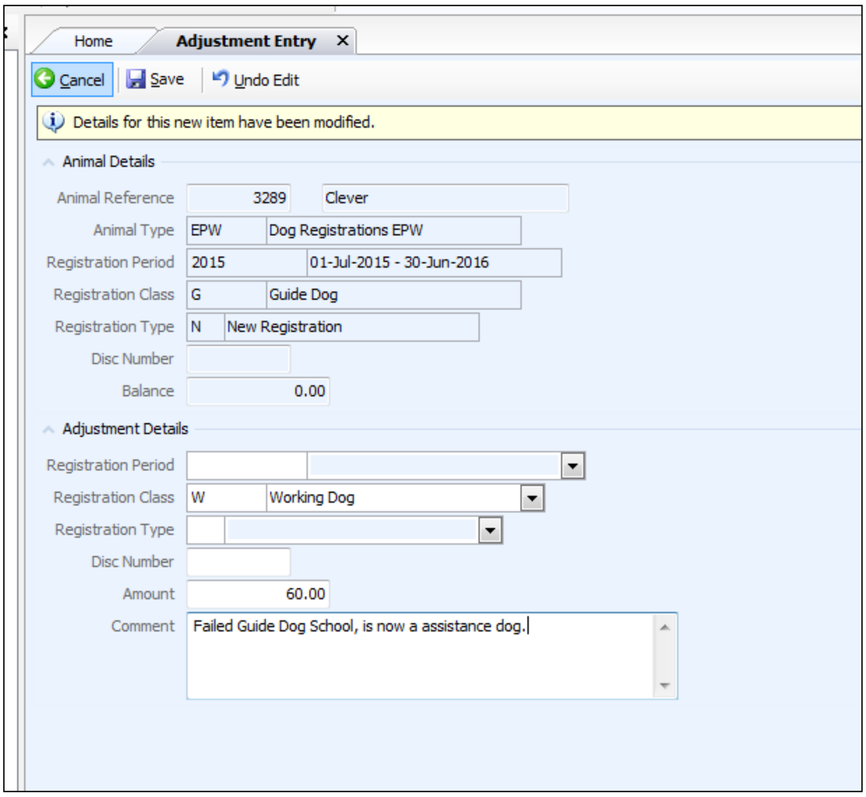


Changing Class via Registration Maintenance

Changing the Animal Class can also be performed via the Adjustment option.

When the class is changed the appropriate value will be calculated. (either up or down)

This could result in the Registration being overpaid, in which case a Refund may be made.

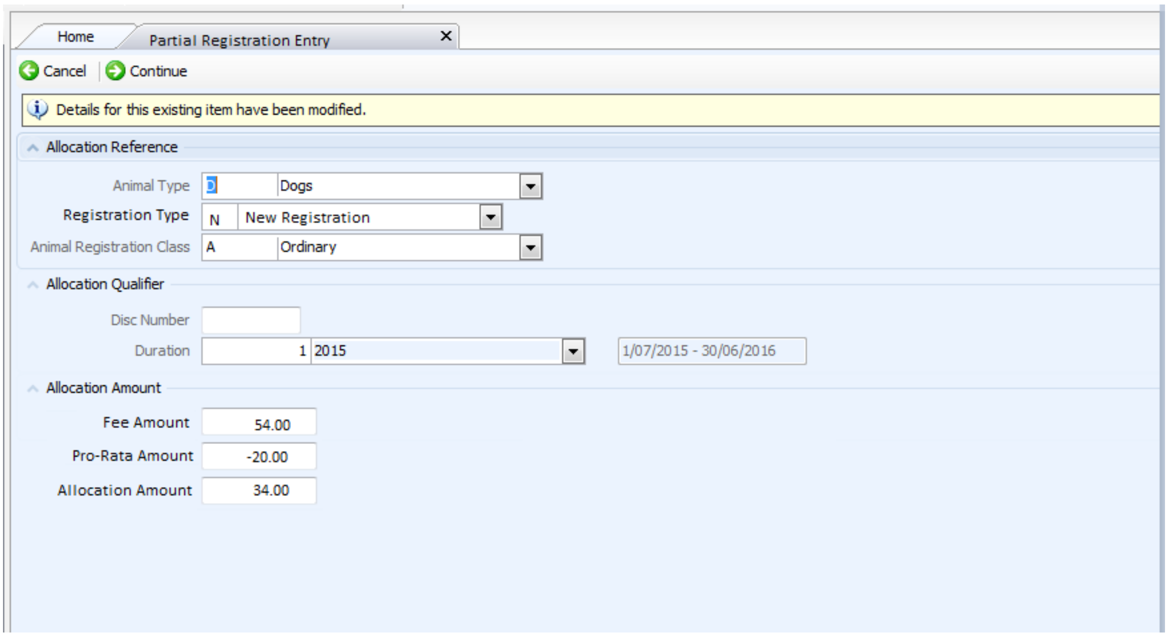


Animal Receipting

Partial Registration Entry

Partial Registration Entry is used for new Animals being registered where a quick process is required for the Front Counter entry of the financial details. Back office processing then updates the record with the final details.

To create a Partial Registration the cashier will enter 'AN' on the Receipt Entry form and press Add Line. Then on the Animal Allocation Line Maintenace form the Partial Registration Entry Option is selected.



The Registration fields will default to:

- The default Animal Type (but can be changed to another active Animal Type)
- The Current Default Period (and is display only)
- The default Registration Class (but can be changed to another active Registration Class).
- Registration Type of 'New' or 'Transfer' only.

The Disc Number is mandatory.

Validation on the Disc Number entered will be performed to ensure that the disc has not previously been issued in that Period.

The Pro-Rata amount will be displayed along with the Fee Amount.

If the defaults are changed, then the pro-rata and balance will change accordingly.

The allocation amount will be defaulted to the total amount due for that registration.

Once the Partial Registration has been accepted the Cashier is returned to the Receipt Entry form.

From there the Cashier can delete the Partial Registration or detail out and maintain the Partial Registration details.

Update Animal Registration Flag

This batch process is used to set the "Is Registered" Flag on the Animal.
The 'Is Registered' flags on the Animals and the Registration Period are redundant fields that are set as per the rule described on the Animal Type parameter.

This process reads all the Animals and Registration Periods to ensure the flags are set correctly.

Not only is it a housekeeping job to ensure the flags are correct it will be required to be run when the previous Registration Period expires to ensure that all Animals at that point are unregistered.

The process would be run at the end of the registration period after the Renewal Notices have been issued when the new registration period takes effect.

For example:
Registration Year : 1st July 2017 to 30th June 2018
This process would be run on the 1st July 2018 to set the Is Registered flag off.

If a customer has paid for new registration period (2018 to 2019) then the Is Registered flag will be left on.

Animal Renewal

The Renewal may now be run in Report Only mode.

A Report has now been created. It is recommended that Renewals be run in Report Only mode first, and checked to ensure totals are correct. There are totals at the end of the Report, the report may also be exported (to a spreadsheet for example) if required. Please note that this report is produced to assist with balancing, it does not contain all details of the notice.

In addition to the Animal Type and Status, the criteria for an Animal Record to be included in the Renewal process is as follows:

	Include from last Period – ALL	**Include from last Period - Registered**
Animal is Registered beyond the previous period. (e.g. a 3 year disc)	✗	✗
Animal is Registered in previous period.	✓	✓
Animal is NOT Registered in the previous	✓	✗

Where an Animal record has been matched for Renewal a Registration Record will always be written to the Animal. *(Previously this did not occur where Discs were not issued with Notices.)*

The Registration Record “Is Registered” flag will be off.

Applications

Enhancements

IMPORTANT NOTE

The enhancements contained within this Section (Applications) have been released to customers. However, it should be noted that development is NOT YET COMPLETE due to the size of the project.

The functionality should only be turned on / used in a TEST/TRAINING environment.

The full functionality will be finalised in Release 3.10.009. Conversion of any data for this functionality will NOT be performed on that upgrade.

Application Parameters / Maintenance

InforXtreme Incident: CCC 7707046; BAYSIDE 10613718; SMART CLIENT;	DRN: 29592 KB:	Fix: 03107000; 03107007; 03107010; 03107024;

Infrastructure Charges (Contribution Fees)

Overview

New methodology has been introduced in respect to the way Contribution Fees can be handled within Pathway.

These changes have kept in mind existing use and should have minimal or no impact on existing processing.

No configuration changes are required if you are using the original methodology.

The following setting in **SetL.asn** is important.

```
; Indicate whether the Load Contribution Fee Maintenance form
; should be displayed when loading contribution fees in the smart
; client.
;
;    0 - the form will not be displayed
;    1 - the form will be displayed
LAP_LoadContributionFeeMaintenance=1
```

If you wish to use this new functionality, this setting must be set to 1. **(For Testing purposes only at release 3.10.008)**

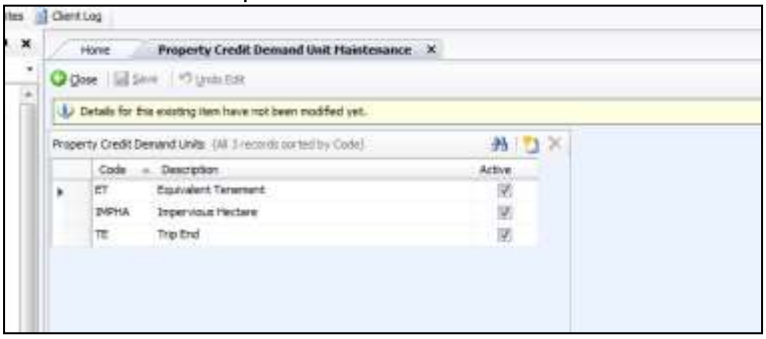
Leave as 0 for existing functionality.

Demand Unit

Demand Units are established via Applications >> Development Contributions >> Property Credit

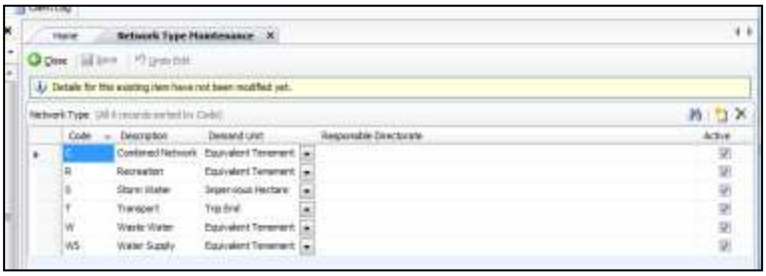
Demand Unit Maintenance.

The code and description are user definable.



Networks

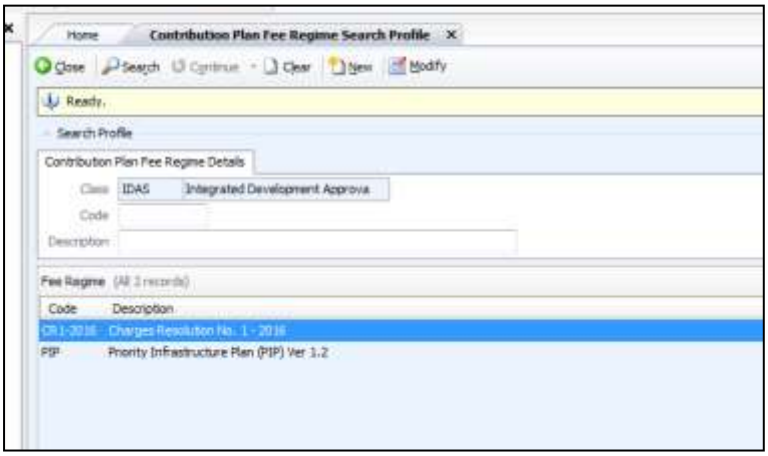
Network types are established via Applications >> Development Contributions >> Network Type Maintenance.



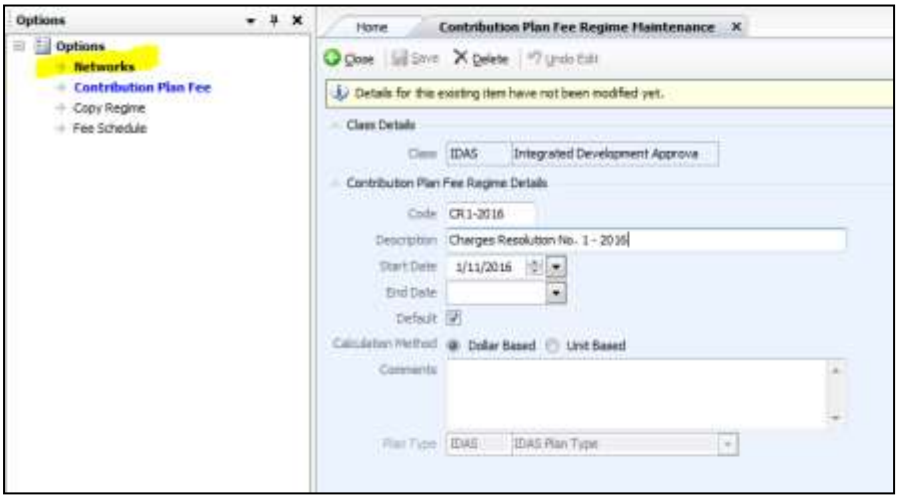
Code – 10 character code for the Network.
Description – 50 character description for the Network
Demand Unit – The appropriate unit of demand for the Network
The Responsible Directorate is a text field only and may be used for reporting purposes.

Contribution Fee Regime

The next step is to assign the appropriate Network to the various Fee Regimes that are in place. In this example there are 2 Fee Regimes.



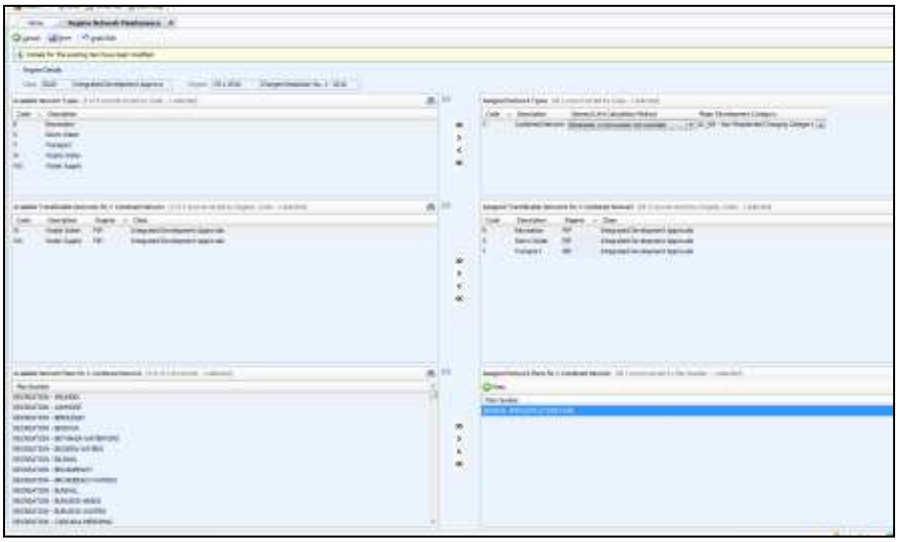
This form displays the Fee Regimes in descending Start Date order.
Select a Fee Regime to modify.



Now select the Networks Option to set up the appropriate Networks for the Regime.

Regime Network Maintenance

This form is a key driver for how the Contribution Fees and Property Credits are to be calculated and assigned.



This form is broken up into 3 horizontal sections.

Top Section
The top section sets up the appropriate Networks for the Charge Regime selected.
The user will move the appropriate Networks from the Available Networks Type column to the Assigned Network Types column.
In this example there is only 1 Network Type applicable to the Regime. If this was a Priority Infrastructure Plan Regime, then Recreation, Storm Water, Transport, Waste Water and Water Supply would be assigned.

Demand Unit Calculation Method – This value denotes which method will be used when calculating the number of demand units for a charge for this network.
The Demand Unit Calculation is only applicable to Unit based Regimes where a ‘demand’ is calculated for the purpose of calculating the Contribution Fee.
The following Calculation Methods are available and will be explained in more detail later in this document.

Method 1

Dimension value X Conversion Rate = Demand Unit - Round Down Result to nearest whole number
Label : Dimension X Conversion rounded

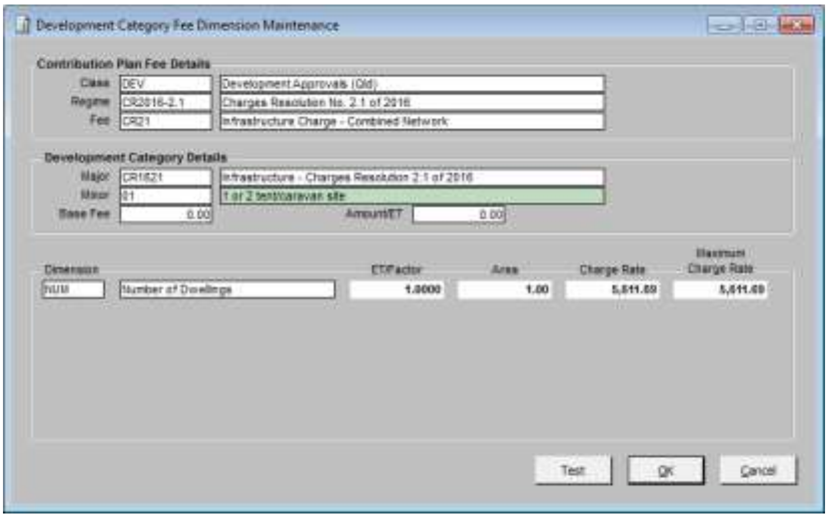
Method 2
Dimension value X Conversion Rate = Demand Unit - No rounding
Label : Dimension X Conversion not rounded

Method 3
Dimension value X Density = Sub Total (Round down to nearest whole number)
Rounded Sub Total X Conversion Rate = Demand Unit – No rounding
Label : Dimension X Density rounded X Conversion
Major Development Category – which is the default Major Category to use for calculation.
Important: Only one Major Category can be used per Regime / Network combination.

Middle Section
The middle section determines which Networks are appropriate for the distribution of Property Credits. A Property Credit may exist for a Transport Network however we need to ensure that it can only be transferred to a valid list of Networks. For example, it should not be transferred to a Water Supply network charge.
As the user gets focus on a Network in the Top Section of the form they can allocate which Regime/Network combinations are valid.

Bottom Section
The bottom section of the form shows all available Contribution Plans.
The appropriate Plans for the Fee Regime are then selected to the right hand column.
In the example shown there is only a single Plan that is valid for this Regime.

Maximum Rate
A new field has been added to the Development Category Fee Dimension Maintenance form.
This new field reflects the maximum Rate that can be charged to an Application. It is used in the Combined Indexation Update function described later in this document.



Because of the requirement to hold the maximum charge rate at the minor category dimension level a business rule has been introduced that restricts the number of dimensions to ONE for each Minor Category.

This only applies where the Combined Indexation calculation method is used.

Transaction Types

Two new Fee Transaction Types have been added.

Transaction Type: 25 – Transferred from

Transaction Type: 26 – Transferred from - Reversal

Fee Calculation Changes

These changes ONLY apply if the Contribution Fee Regime is flagged as a Unit Based Regime.

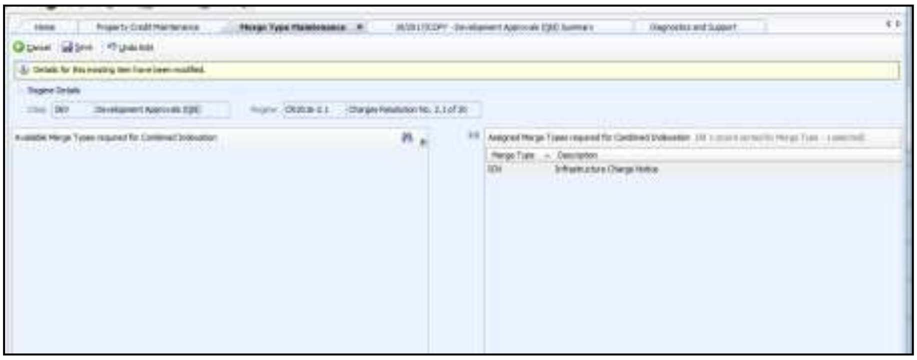
For Unit Based Regimes the following will be used:

Field Value for Dollar Based Regimes	Equivalent Field Value for Unit Based Regimes
Base Fee	Base Fee
Amount/Et	$ per Demand Unit
ET/Factor	Conversion Rate
Area	Density
Charge Rate	Charge Rate
Maximum Charge Rate	N/A

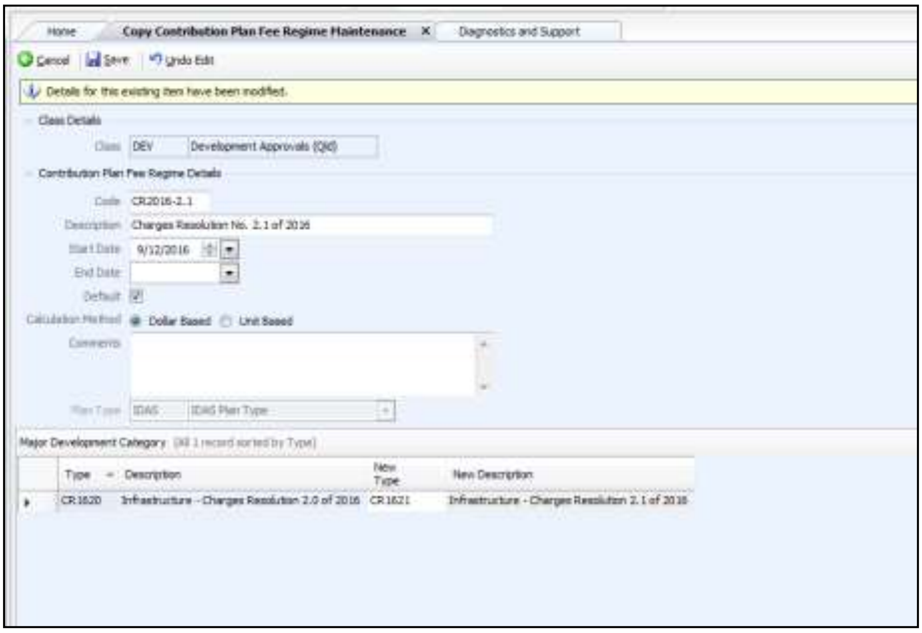
Unit Based Regimes require calculations based on a “Demand Unit” being passed into the Fee Calculation where it will simply be multiplied by the Amount/Et ($ per Demand Unit)

Merge Type selection

A new Regime Option has been created to allow the customer to select which Merge Types (letter types) should be considered when the Combined Indexation is run.



Copy Regime

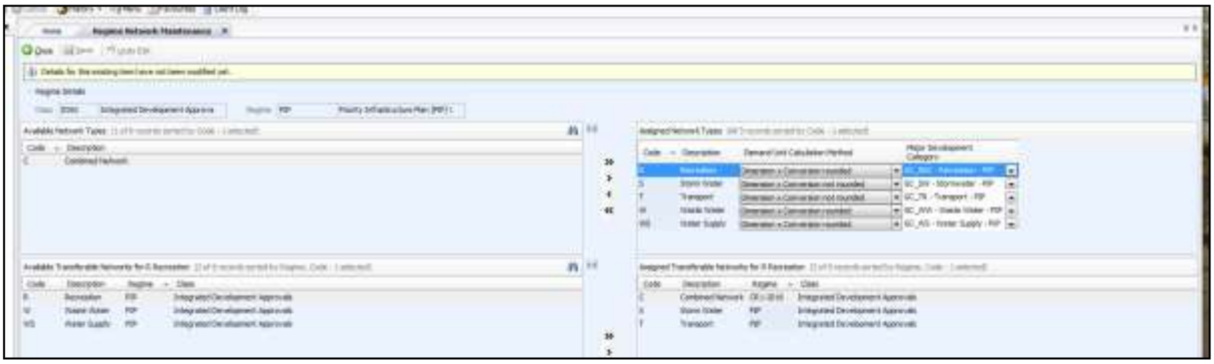


Changes have been made to the Copy Regime function.
Due to the requirement of having a unique Regime / Network / Major Category relationship the ability to nominate a new Major Development Category has been provided. The user will enter the new Major Category Code and Description.

As part of this function a new Major Category will be created and new Minor Categories (copied from the source Regime) will be created. If there is more than one Network/Major Category on the source Regime then multiples will show on this form.

In addition, when the Regime is copied then all minor categories and their dimensions are copied to the new Schedule. Previously only 'used' categories and dimensions were copied.

Demand Unit Calculation Method
How the Demand Unit is calculated is different depending on the Regime/Network combination.
It is necessary therefore,to assign the method to be used at this level. This method may be overridden at the time the demand is calculated if required.



To calculate the Demand Unit Pathway will need to retrieve the appropriate values from the Fee Categories, as well as the input Dimension.

Method 1
Dimension value X Conversion Rate = Demand Unit - Round Down Result to nearest whole number

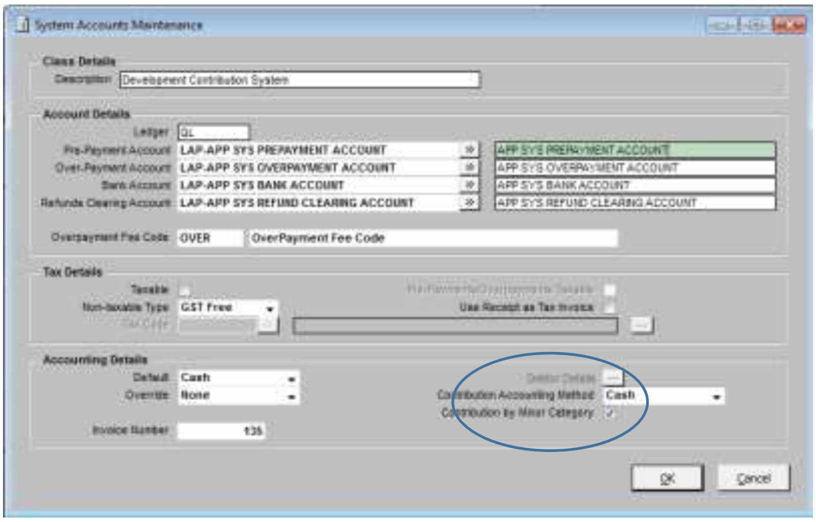
Method 2
Dimension value X Conversion Rate = Demand Unit - No rounding

Method 3
Dimension value X Density = Sub Total (Round down to nearest whole number)
Rounded Sub Total X Conversion Rate = Demand Unit – No rounding

System Parameter
In order to meet the requirements of this functionality a change has been made to way Contribution Fees are written.

Where multiple Development Categories are involved a separate Fee line will be written for each Category.

To support this, a new parameter has been added to the System Accounts form within the System Parameter in Applications. **"Contribution by Minor Category**".



This is to enable the requirement for overriding charge rates as well as Minimum / Maximum Charge calculations.

Fee Calculation

Dimensions on Minor Categories

The set up of the calculation for the Contribution Fees **must** use the Development Category methodology.

Contribution Fee Dimensions cannot be used.

Calculation

The following occurs where there are no pre-existing contribution fees on the Application.

If Contribution Fees already exist on the Application then a blank form is presented and the Insert button can be used to manually add additional fees.

Summary of Process

Pathway will gather up all of the Plans against the Property or Parcel.

Pathway will then load all matching Regimes >> Networks >> Plans >> Major Categories onto the form. (If no Plans are found then the form will be blank for manual entry via the Insert Button.)

If this is a Parent Application (i.e. it does not have a parent) then only Regimes where the Start Date is less than or equal to ‘today’ and the End Date is either null or the End Date is greater than or equal to ‘today’ will be considered.

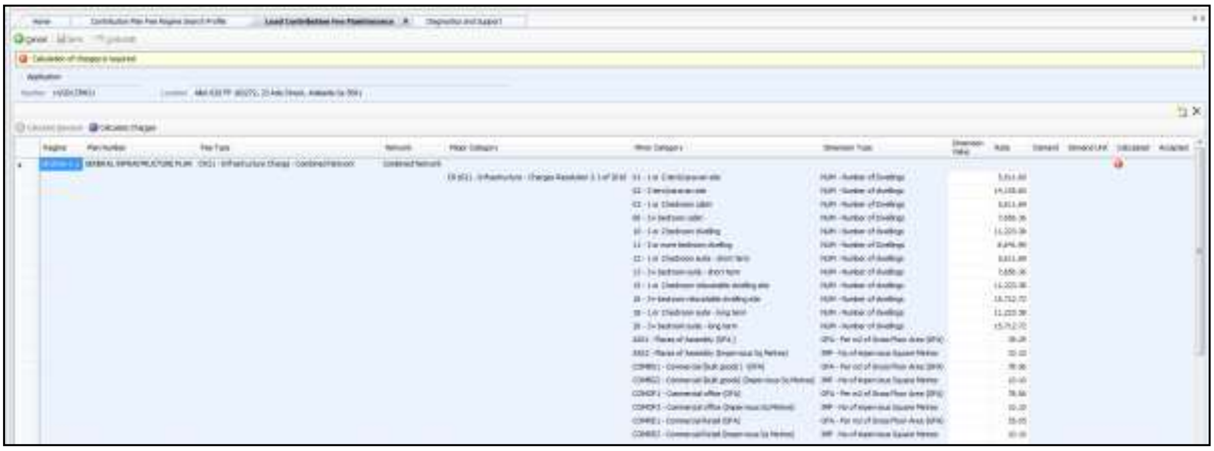
If this is a Child Application (i.e. it has a parent) then the Fee Regimes used will be the same as the Parent Application. However, the Hierarchy function would normally be used to share fees ‘down’ to a Child Application.

The Minor Development Categories and their ‘Dimensions’ will be loaded.

If the Regime is Dollar Based then the user will enter the appropriate dimension values and then press the “Calculate Charges” Button.

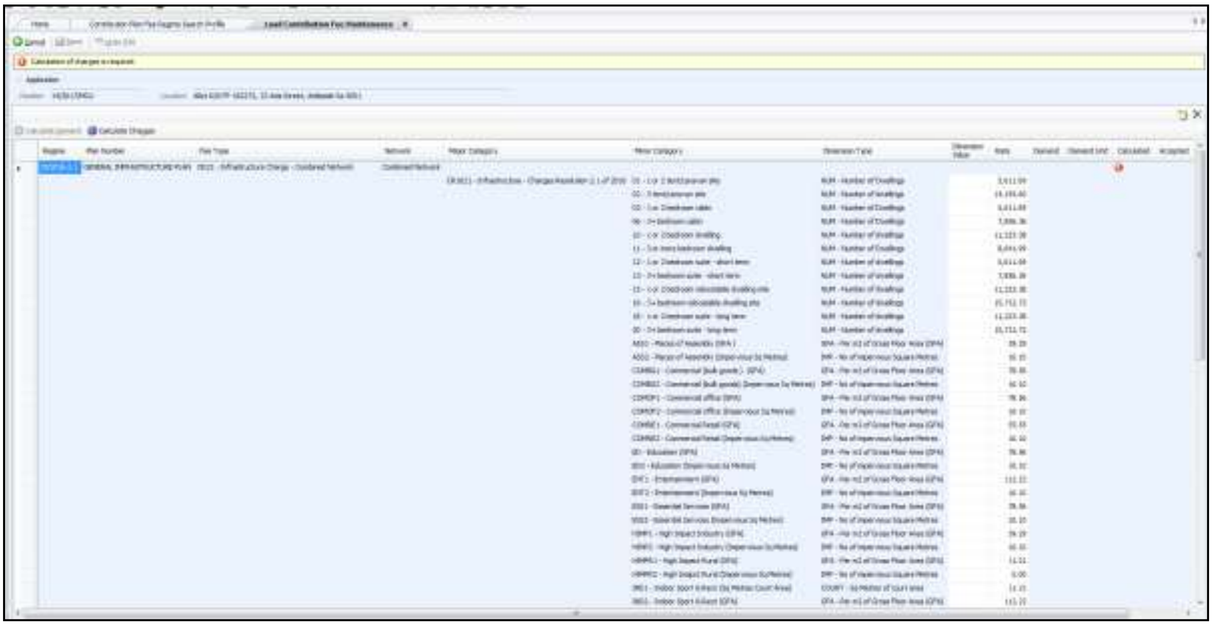
If the Regime is Unit Based then there is an extra step required to calculate the “Demand” value on which the Fee is calculated.

Based on all of the information entered the Fee will be returned to the form.



The Calculate Demand Button is not available for Dollar Based Regimes.

Gross Fee Calculation



The creation of new Contribution Fees has been enhanced to show more information on one screen, as well as being able to review the charges prior to committing them to the Application.

The details loaded are based on the existance of Property Plans against the Application Location.

Plans belonging to Regimes that have an ‘end’ date less than ‘today’ will not be loaded. E.g. PIP

Plans belonging to Regimes that have a ‘Start’ date greater than ‘today’ will not be loaded.

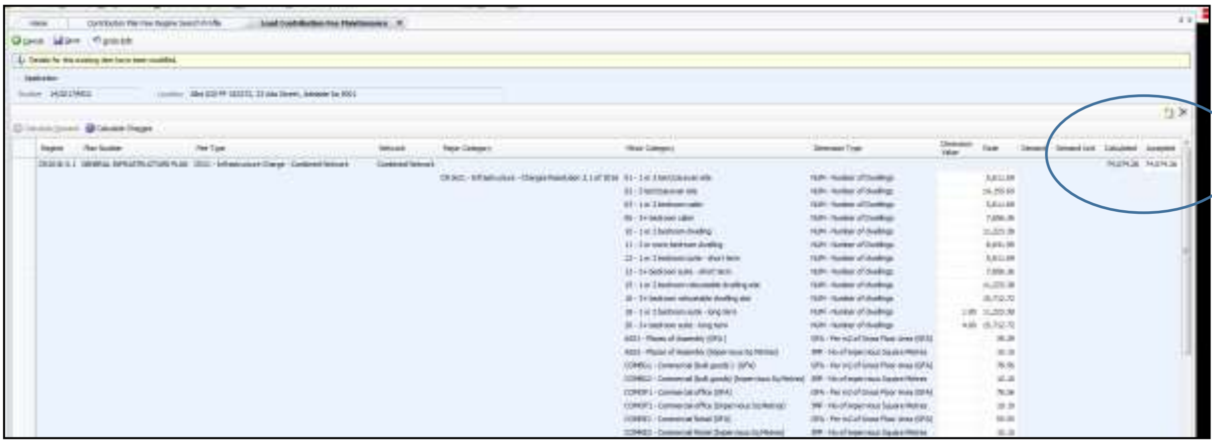
At any time the user can delete any of these records (prior to calculating the fees) and add new ones manually.

Once the user is happy with the above calculations the “**Calculate Charges” Button** will be pressed.

The data on this and the ‘calculate demand’ forms is saved and the user will be able to review the information.

The values may be changed as many times as necessary and the Calculate Charges button can be pressed to recalculate the amount.

The Rate may also be changed by the user if required.



The user may Cancel the form and the details will not be saved.

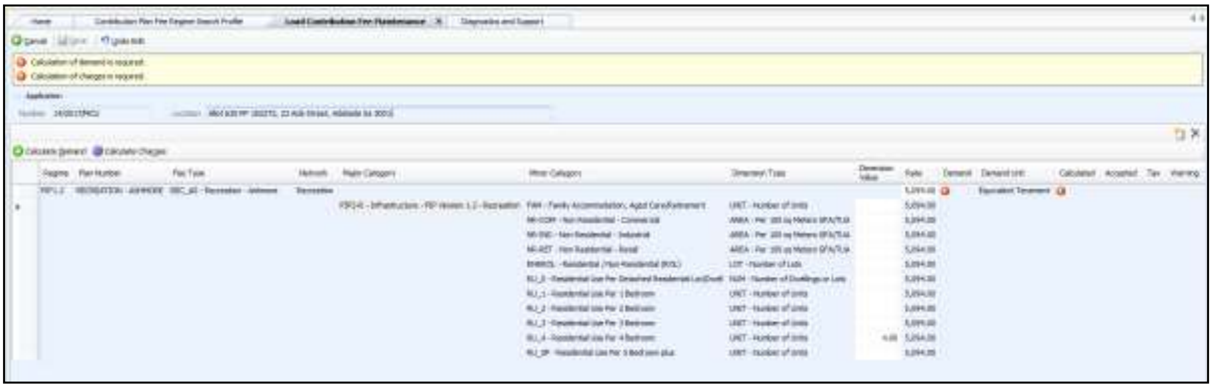
Once the user is happy with the calculation then the Save Button may be pressed to commit the changes.

The form is only pre-populated once on initial creation of the charges. Once contribution fees exist against the application then the form will be presented in ‘manual entry’ mode.

Details entered can be viewed via the Contribution Fees Maintenance >> Transactions >> Calculation Enquiry >> Development Category Calculation Enquiry.

Calculate Demand

For Unit Based Regime charges an extra step is required to calculate the Demand value.



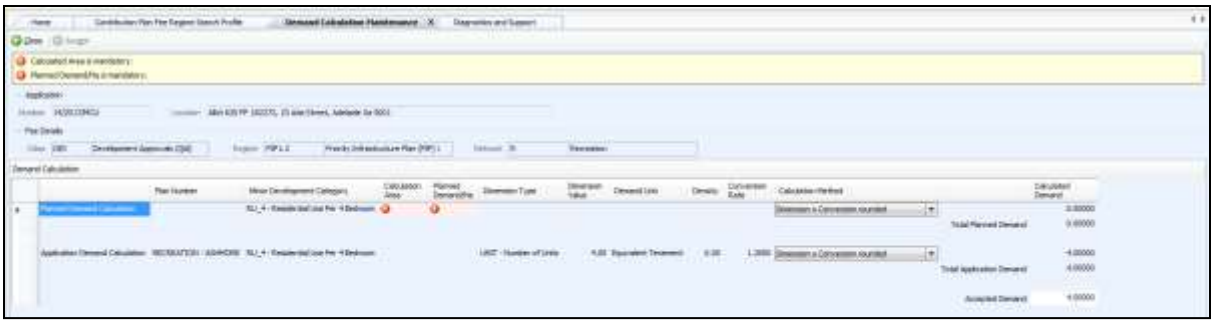
The example shows a PIP Charge for Recreation (which is Unit based) inserted.

The Calculate Demand button is now available.

For Unit Based Regimes the fee is calculated based on the Demand calculation.

The user will press the Calculate Demand Button.

The Demand Calculation Maintenance form is opened.



There are two horizontal sections to this form.

The top section is to calculate the Planned Demand.

The bottom section is to calculate the Application Demand.

Pathway has automatically calculated the Application Demand based on all of the values that it knows.

Planned Demand
For Unit Based Regimes there is the requirement to calculate a "Planned Demand" unit.
This is in addition to the "Application Demand" unit.
Pathway will then take the higher Demand Unit value as the default value.

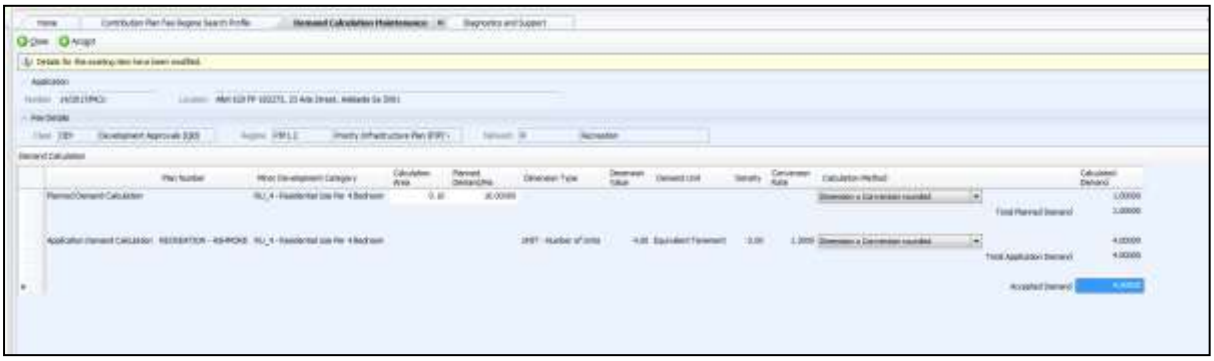
Planned Demand Calculation
Planned Demand calculation is a manual entry for the required variables. Pathway then uses the Calculation Method selected to calculate the demand.

Each Development Category is brought forward onto the Demand Calculation Maintenance form.

In this example the user has entered a figure of 0.1 Hectares as the Calculation Area and 16 as the Planned Demand/Ha. The Method has been defaulted from the Regime/Network and selected as the calculation method. The Calculation Method may be overridden if required.

The calculated demand is then populated by Pathway based on these figures.

If the user changes any of the values then the "Calculated Demand" will be re-calculated.



Application Demand Calculation
For each Minor Category Pathway will bring forward the Contribution Fee, its Dimension and Value, the Demand Unit and the associated Conversion Rate.

The Conversion Rate is found by Plan >> Fee >> Major Category >> Minor Category >> ET/Factor (Conversion Rate)

Using the Calculation Method held against the Regime/Network the Application Demand will be calculated.

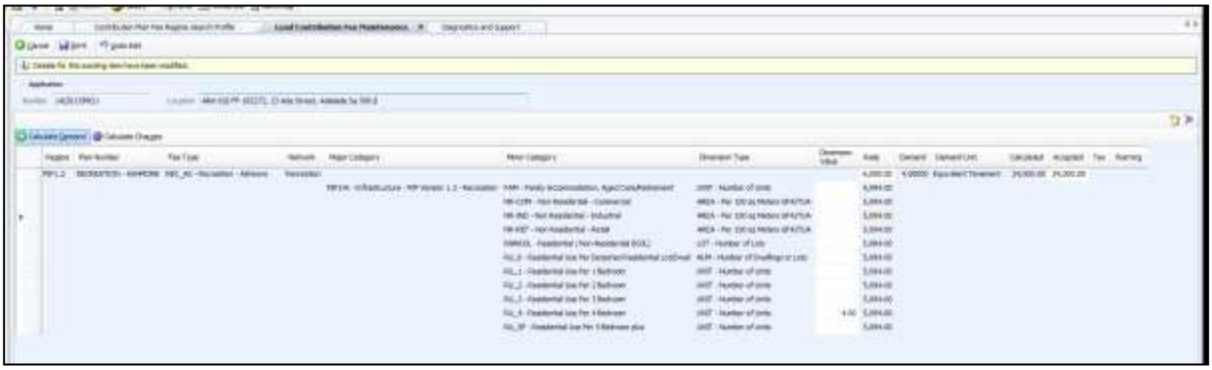
The individual Application Demands are added into the Total Application Demand field.

Whichever is the higher value of the Total Planned Demand and the Total Application Demand is written to the Accepted Demand field.

The Accepted Demand value may be overwritten by the user with another value.

All of the information on this form is saved and is available from Transaction Enquiry.

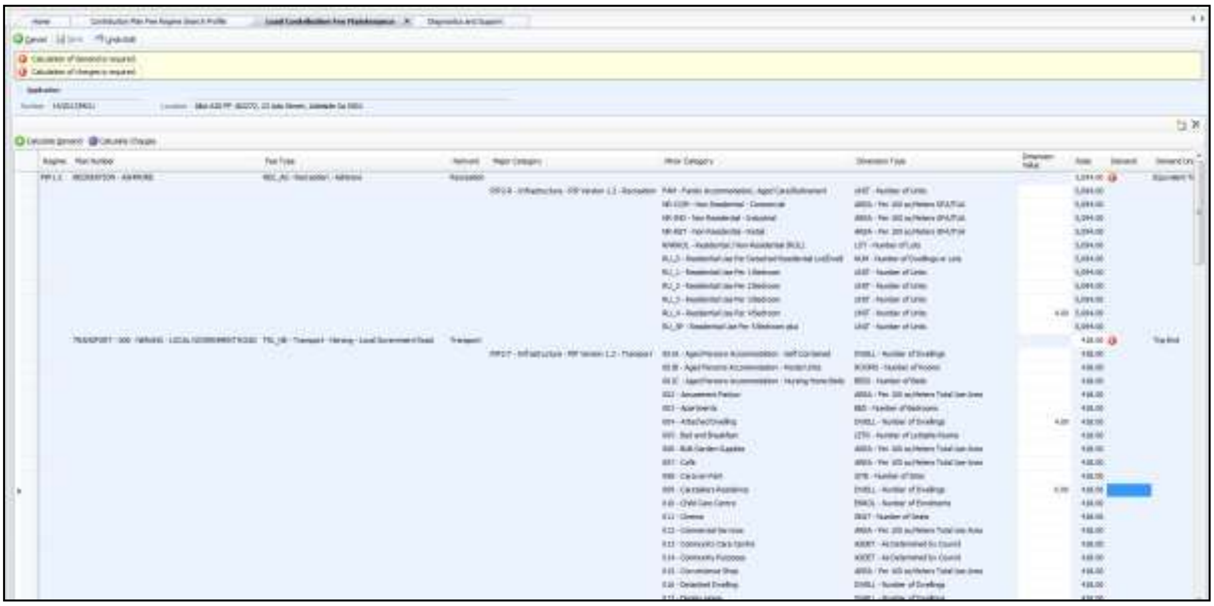
The following screen shot shows the Accepted Demand Value returned to the Load Contribution Fee form as well as the Rate being overridden. The Calculate Charges button has been pressed the calculation is the Accepted Demand multiplied by the overriding Rate.



Examples

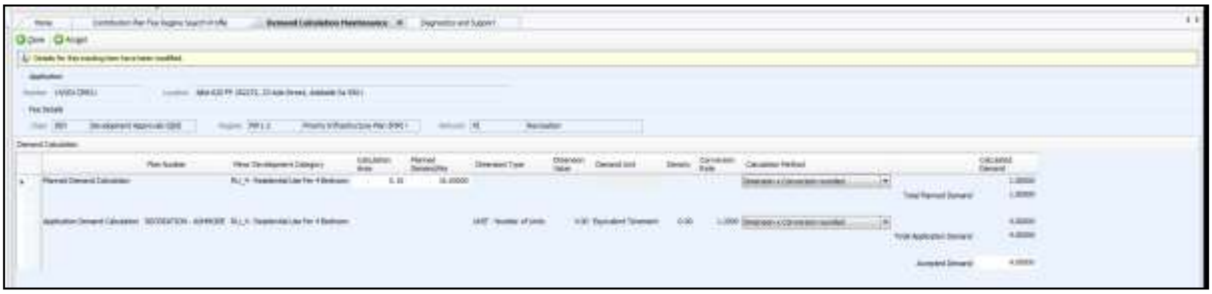
The following example shows two PIP charges being inserted. One for Recreation and the other for the Transport network.

The dimension values have been entered.



The user must press the Calculate Demand Button for each of the different Networks.

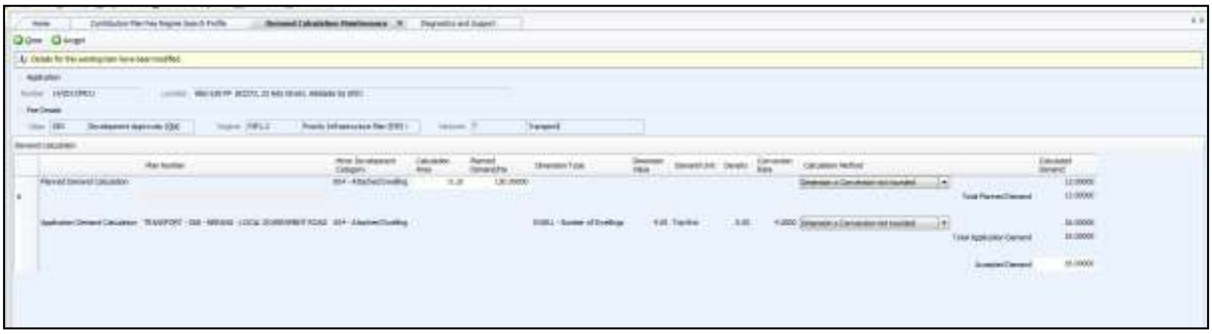
With focus on the Recreation Network press the Calculate Demand button.



Press Accept.

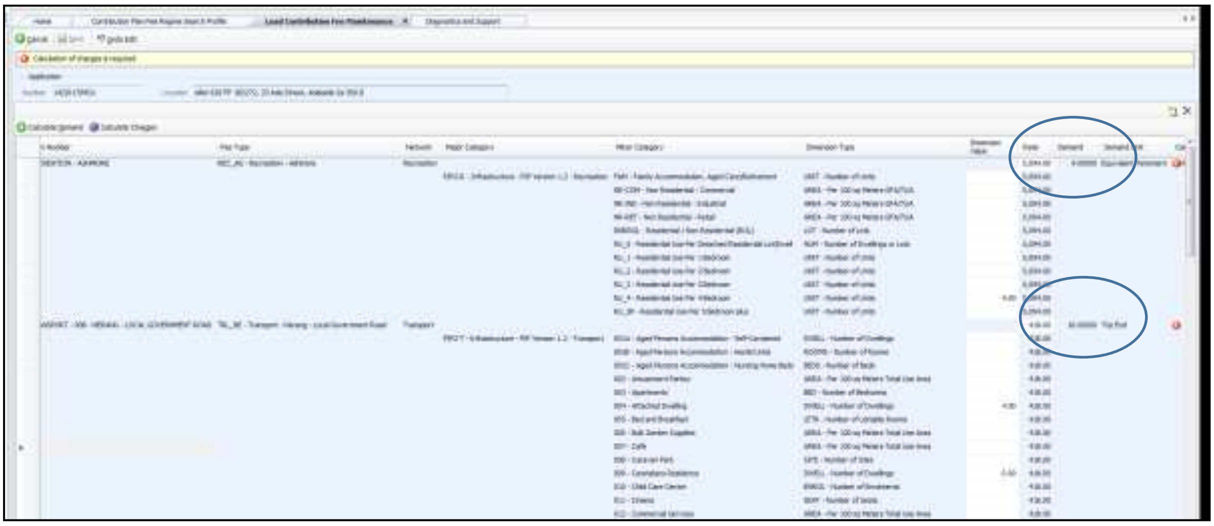
Then with focus on the Transport Network press the Calculate Demand button.

Pathway will present the form with the values established for the Application Demand, the appropriate values are then entered for the Planned Demand.

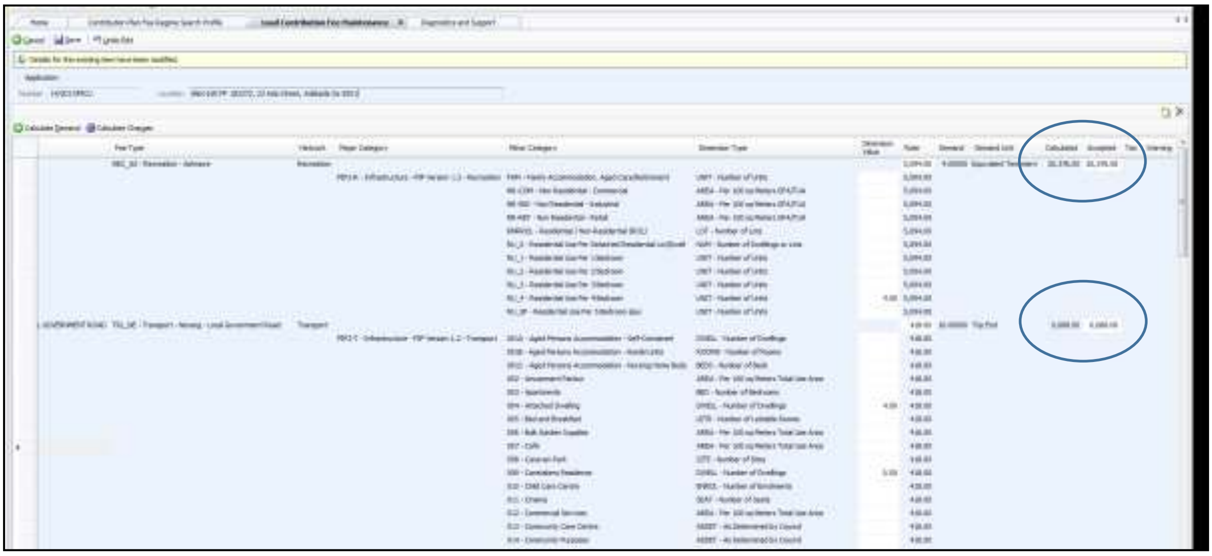


User presses Accept.

In the next screen shot we can see the Accepted Demand has been populated for each Network.



User now presses the Calculate Charges Button.



When Save is pressed the appropriate Fees are written to the Application.

Application Hierarchy

Overview

Hierarchy Maintenance provides a method of ‘linking’ Applications together that are related.

For example, an Application created for a Reconfiguration of a Lot may be considered to be the ‘parent’ Application in a Hierarchy.

Other Applications can then be brought into the Hierarchy effecting a Parent / Child relationship.

Where Contribution Fees exist they can be ‘shared down’ to other applications within the same Hierarchy.

An Application cannot appear in more than one Hierarchy.

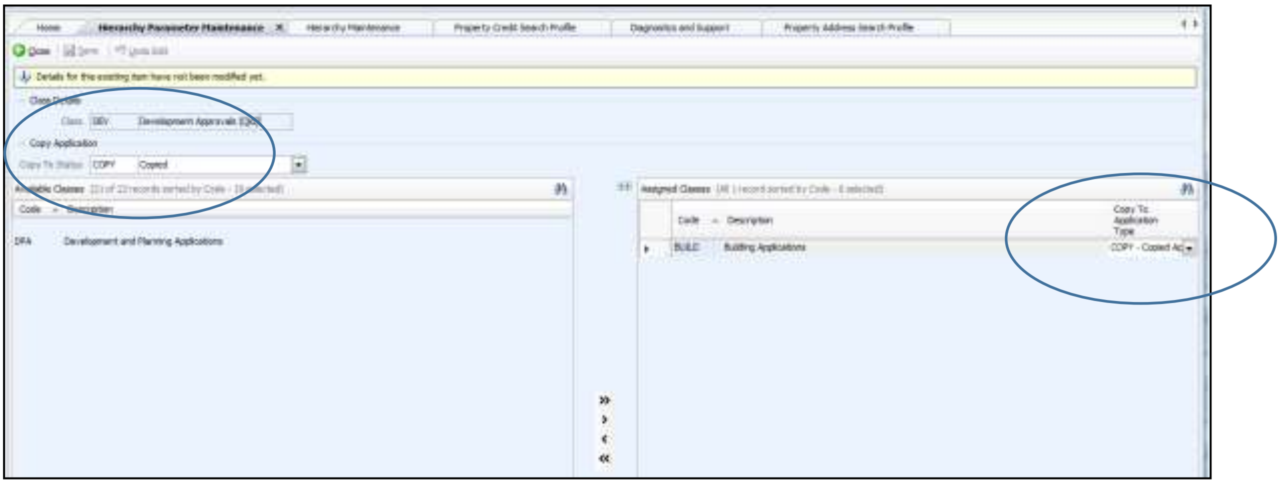
Hierarchy Parameter

A new Application Class Parameter has been created called “Hierarchy”.

The new parameter and its associated maintenance function must be assigned via Applications >> Application Classes.

The Hierarchy Parameter determines which Classes may be accessed in order to ‘copy in’ Applications held in a different class into the current class. It also contains the Application Type and Application Status that should be used for the ‘copied’ application.

Further information on the Copy function is detailed later in this document.



Hierarchy Maintenance

In the example below we can see an Application for the creation of 3 residential allotments.

The ability to show/hide various details on the form is provided by filter Icon shown above.

Adding another Application to the Hierarchy

With the Application selected the user presses the Insert Button.

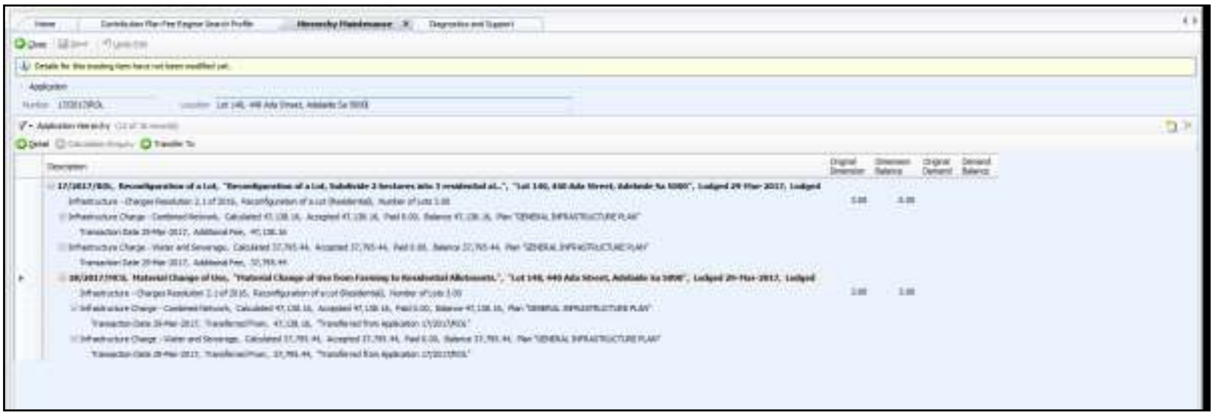
The option exists to either select from within the current Class, or select an Application from another Class.

The following screen dump shows the selection of a corresponding Material Change of Use Application from within the current class.

It has been linked as a Child Application to the ROL Application.

Further to that, the “Transfer To” button has been pressed and the development units have been transferred to the MCU Application.

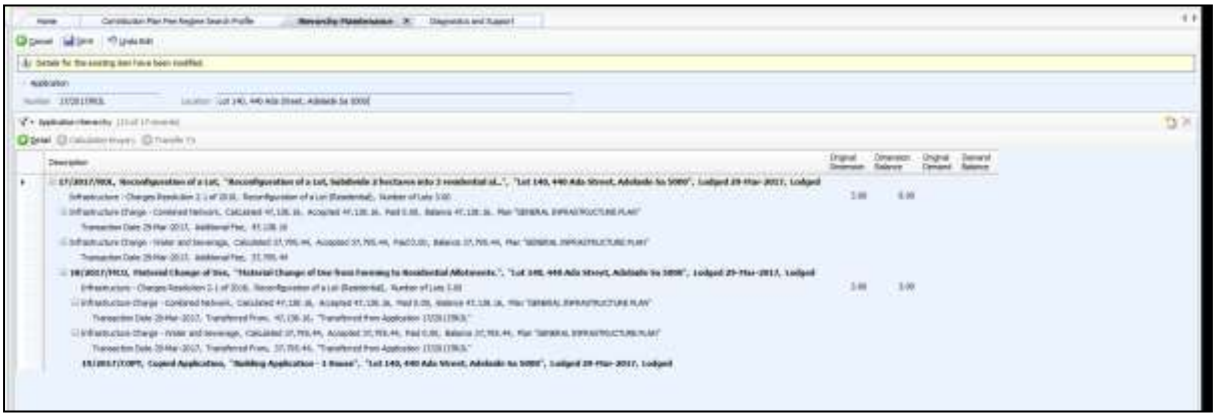
Note that the Dimension Balance on the ROL Application is now Zero and the Dimension Balance on the MCU is now 3. The Contribution Fees have been raised on the MCU automatically. In this function the latest indexed rate is used.



When the Building Applications are received, they may be included within this Hierarchy.

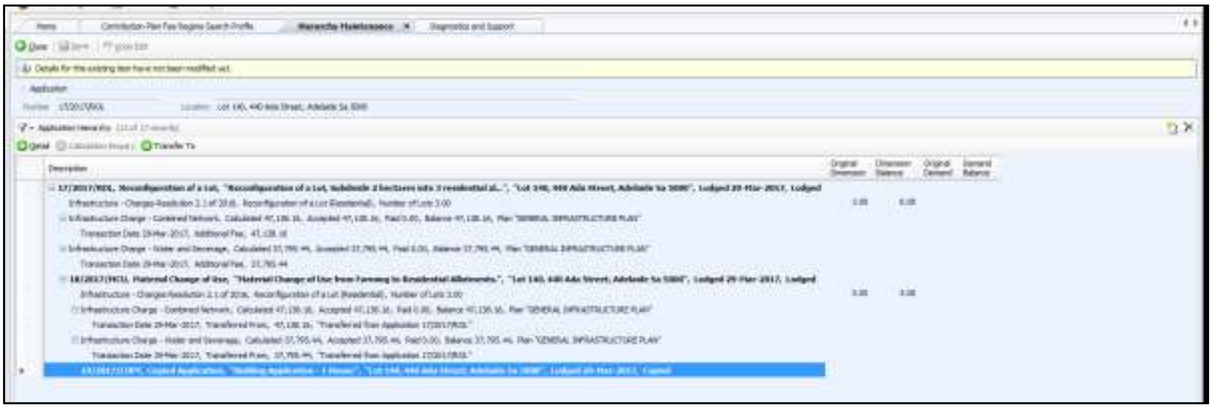
If the Building Applications are in a different Class a **copy** will be automatically created within the current class and linked to the source application as a Related Application. Default data such as the locations, names, description and dates will be copied with the Application. Please note that the copied application will **not** be updated from the other class once it is copied in, and remains a completely separate application.

Selecting the MCU application and pressing the Insert Button will put the inserted building application at the child level to the MCU, and as a grandchild to the original ROL Application.



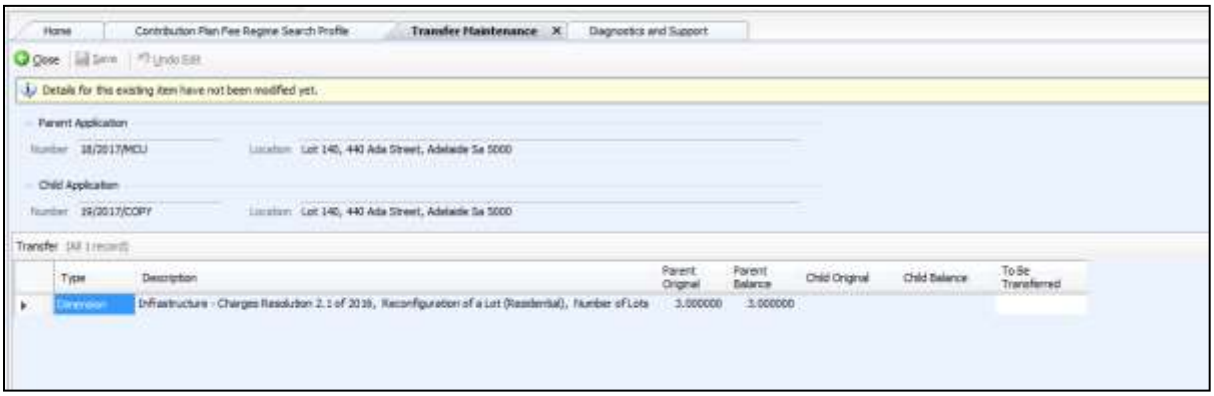
Note that the Building Application has been given a new number and the Application Type is the one specified for the Class under the Hierarchy Parameter.

The units would now be transferred to the new Building Application from the MCU Application.

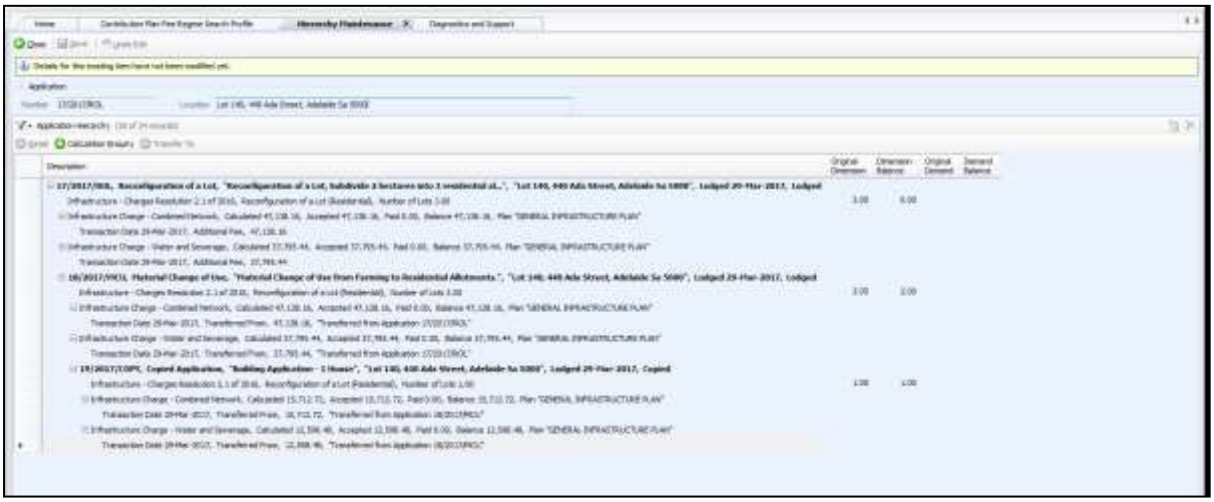


The user selects the Building Application and presses the “Transfer To” Button.

The Transfer Maintenance form is displayed with all available 'transferrable' values.



In this case the "To Be Transferred" value would be 1.



The MCU dimension balance has been reduced and transferred to the Building Application.

Calculation Enquiry

From Hierarchy Maintenance the user is able to 'drill out' to the Calculation Enquiry by pressing the "Calculation Enquiry" Button.

The user must get focus on the "Transaction" line that they wish to enquire on.

Removing an Application from the Hierarchy

An Application may be 'detached' from the Hierarchy by getting focus on the Application and pressing the Delete Button.

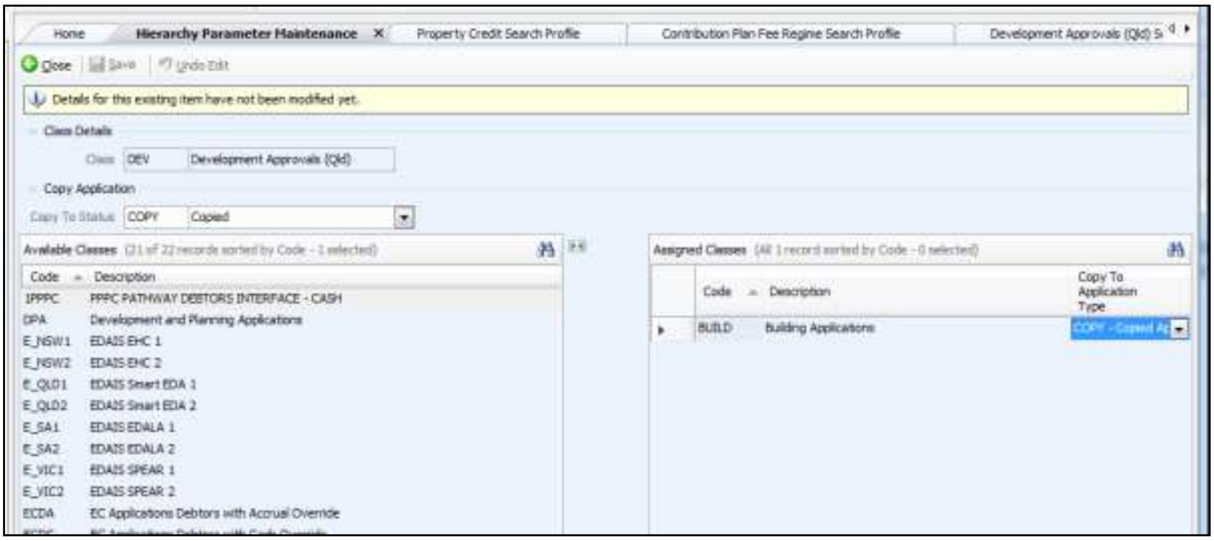
Please note that this does not delete the Application in question, it merely removes it from the Hierarchy.

Copy Application from another Class

Functionality has been provided whereby an Application may be **copied** into the current Class from another Class.

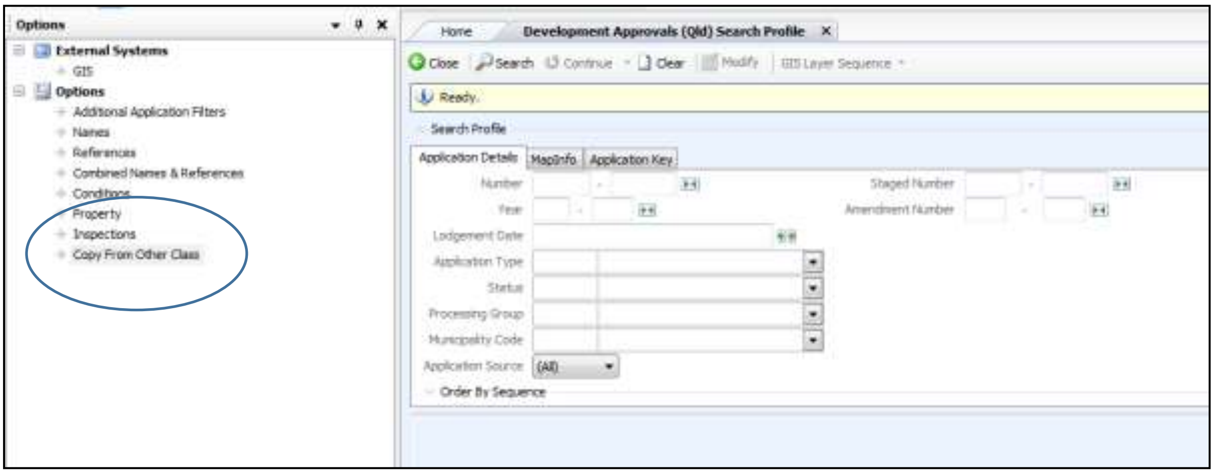
Default data such as the locations, names, description and dates will be copied with the Application. Please note that the copied application will **not** be updated from the other class once it is copied in, and remains a completely separate application.

The copied Application will be given the Application Type designated in the Class Hierarchy Parameter.



The option to copy an Application from another Class is available via Hierarchy Maintenance and the copied application will be placed directly into that Hierarchy.

However, where no Application currently exists then the “Copy Application” function is available via the Application Search Profile – Options



The user will then select the Class and search for the Application to be copied in the normal way. The selected Application will then be created in the current Class.

It will be allocated the next Application Number / Year as set within the Class Numbering Parameter.

All Dates on the Application Data form, Locations and Names will be copied. Other data is generally reliant on parameters, and settings will be different between Classes.

Where Name Roles do not exist in the current Class then the names will not be copied. For example if a Role of Builder exists in the Application to be copied but the Role type does not exist in the current Class, then that name role will not be copied.

The new Application will be given a Status of that specified in the Lodgement parameters for the Application Type.

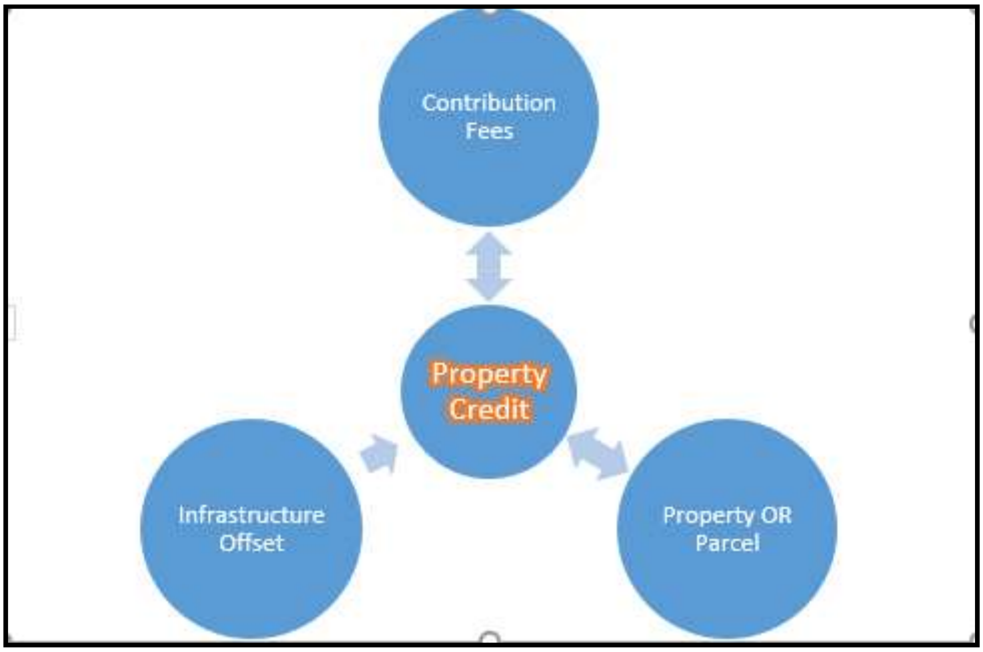
The source Application will be linked as a Related Application and is available for enquiry.

Property Credits

Overview

The term Property Credit refers to the record/s created that will hold the Infrastructure Credits, irrespective of whether the record is linked at the Property or Parcel level.
The system will only allow Property Credits to be linked at one level. A mixture of Property and Parcel level linking is not allowed.

At its highest level a Property Credit could be represented as:



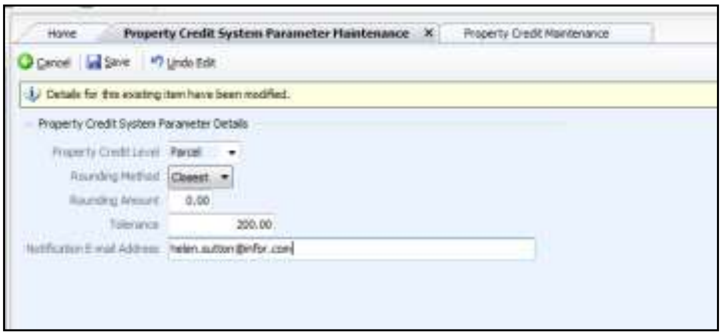
Property Credits are only applicable to Infrastructure Charges (Contribution Fees).

Property Credits may be created manually or will be created automatically (subject to being authorised by the user) when a Payment for a Contribution Fee is made.

Parameters

Property Credit System Parameter

This form is accessed via Applications >> Development Contributions >> Property Credit System Parameter Maintenance



Property Credit Level – nominates whether Property Credits are linked to Property or Parcel records. Once Property Credits have been created at the selected level then this parameter cannot be changed.

Tolerance – The value here controls whether a Property Credit should be automatically set to Fully Allocated if the Available Balance is less than the tolerance.

Contribution Fee Code Parameter

A field has been added to the Contribution Fee Code “Property Credit”.

This flag determines whether or not Property Credits apply to the particular Fee.

Fee Transaction Types

Two new fee transaction types have been added.

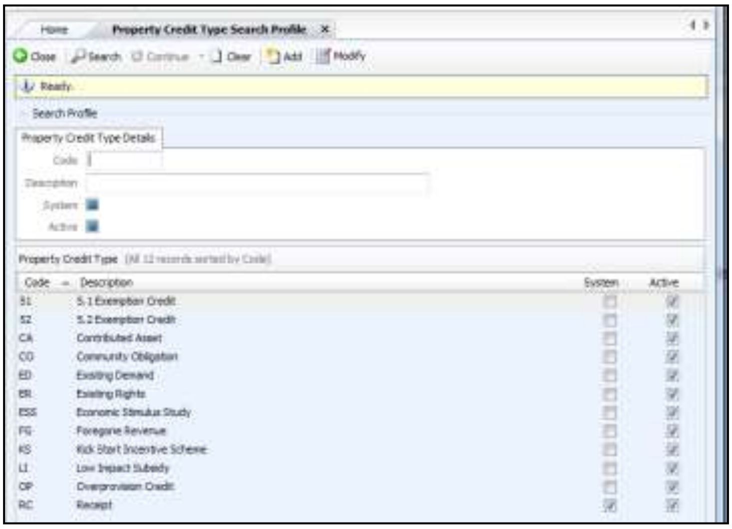
15 – Property Credit
16 – Property Credit Reversal

These are ‘payment’ transaction types and will be used where a Property Credit has been allocated to a Contribution Fee.

Credit Types

Property Credit ‘types’ may be created as required.

These Credit Types are assigned to Property Credits to enable reporting over various incentive types or existing demands.



Property Credit Transaction Type

This table is a system level table and cannot be changed. When transactions are written to a Property Credit, for example a Refund or Transfer, Pathway will use the appropriate transaction type.

Number	Description
1	Receipt
2	Receipt Reversal
3	Created via Offset
4	Offset Reversed
5	Manual Entry
6	Refund

Number	Description
7	Refund Reversal
8	Allocated to Application
9	Allocation Reversal
10	Transferred to another property
11	Transferred from another property
12	Transfer reversal
13	Not Applicable
14	Reinstated
15	Indexation
16	Indexation Reversal
17	Adjustment
18	Created via Allocation
19	Indexation Rule Change
20	Pending Allocation
21	Pending Allocation Reversal

Property Credit Status

Four system level status' have been provided to determine the status of the Property Credit.

Available – the property credit may be used as required.

Fully Allocated – the property credit has been fully allocated to other Properties. The Property Credit may not be used.

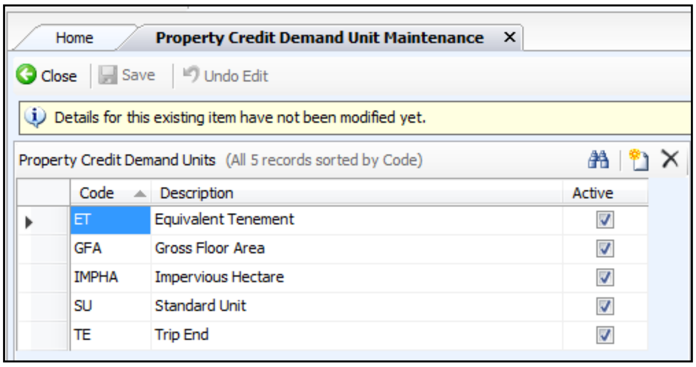
Not Applicable – the property credit is 'not applicable'. This may be where the property credit was created in error. The Property Credit may not be used.

Reversed – the property credit has been Reversed. This status is used where a credit has been transferred to an incorrect property. The transfer is "Reversed" and the property credit may not be used.

Demand Unit Maintenance

This form is called from Applications >> Development Contributions >> Property Credit Demand Unit Maintenance.

This form enables the establishment of the required Demand Unit descriptions. These descriptions are user definable.



Property Credit Maintenance

Property Credits are maintained via Applications >> Development Contributions >> Property Credit Maintenance

The user may search for Property Credits either by entering property credit search criteria, OR by searching and selecting a specific Property / Parcel Address.

This form shows a summary of all the Property Credits for this Parcel/Property.

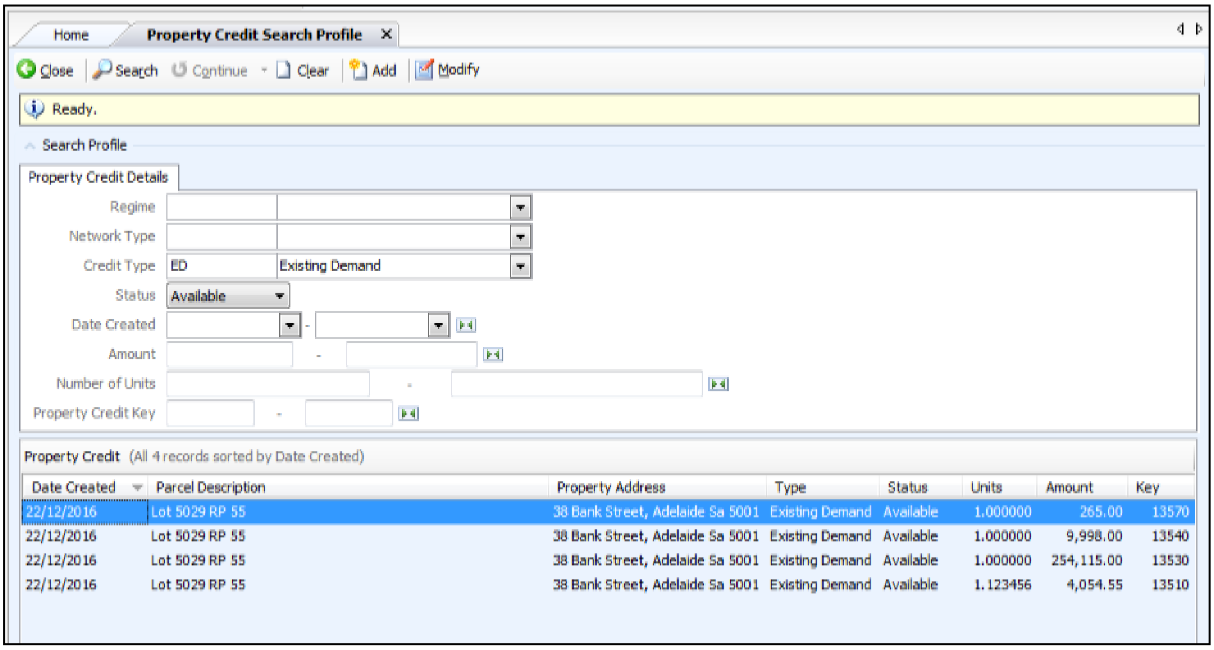
The details may be sorted by the column headings.

Credit Type – Shows the credit type assigned to the Property Credit.
Regime – The Regime that the Property Credit was sourced from.
Network – The applicable Network for the Property Credit
Plan – The Property Plan under which the Property Credit was created.
Fee – The Contribution Fee from which the Property Credit was sourced.
Category – The Minor Development Category assigned to the Property Credit
Rate – The rate at which the Property Credit was created.
Demand Unit – The description of the demand unit.
Unit Based – This flag denotes whether or not the Regime is a ‘Unit Based’ regime (e.g. PIP).
Units – The number of original Units for the Property Credit.
Amount – The original $ value of the Property Credit (Units X Rate)
Available Units – This field shows the number of units that are still available on the Property Credit.
Available Amount – This field shows the available $ value of the Property Credit (Available Units X Rate).
Date Created – the date that the Property Credit record was created.
Status – Reflects the Status of the Property Credit.
Available – the property credit may be used as required.
Fully Allocated – the property credit has been fully allocated to other Properties. The Property Credit may not be used.
Not Applicable – the property credit is ‘not applicable’. This may be where the property credit was created in error. The Property Credit may not be used.
Reversed – the property credit has been Reversed
Key – an internal key allocated to the Property Credit.
Pending Allocations – If this flag is checked on then the Property Credit has been assigned to a Development Contribution Fee as a “Pending” transaction.

Searching for Property Credits

In order to perform maintenance on Property Credits the Property Credit Search Profile form will be used.

It is accessed via Applications >> Development Contributions >> Property Credit Maintenance.



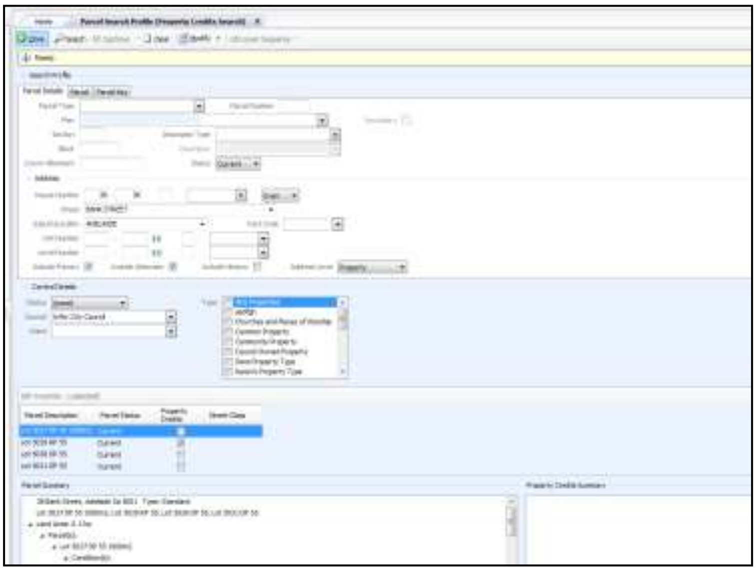
The search fields work in conjunction with each other. In other words, if two criteria are entered then records returned must satisfy both of the criteria.

In the example above we have searched for Property Credits that are for “Existing Demand” and have a Status of “Available”.

Searching by Property/Parcel Address

From the Property Credit Search Profile Options pane there is a Parcel (or Property) search function. Clicking this option will take the user to the Property or Parcel Search Profile. This is the standard

Property Module search profile.



In the example above 4 Parcels have been returned.

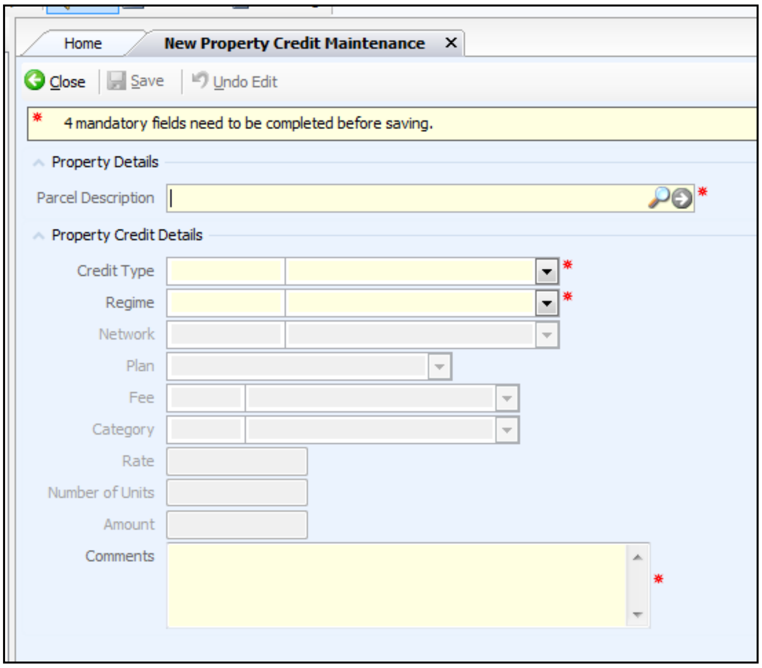
The only parcel with Property Credits allocated is the third one which has a tick in the Property Credits check box.

Creating a Property Credit

This function is provided for the manual uptake of a Property Credit. It is expected that the majority of Property Credits will be created automatically via Offsets and Receipts.

The function is called via Applications >> Development Contributions >> Property Credit Maintenance

The Property Credit Search Profile will be presented and the user will press Add to add a new Property Credit record. (Alternatively the user may navigate to the Parcel record first and then add a New Property Credit.)



A Property or Parcel (depending on the system level setting) must be selected.

The user would then enter the type of Property Credit they are creating and the Regime that is applicable. The Network field then becomes available.

The Network drop down will show all of the assigned Networks to the Regime.

After entry of the Network the Plan field will become available.

The Plan drop down will only show Plans applicable to the Network.

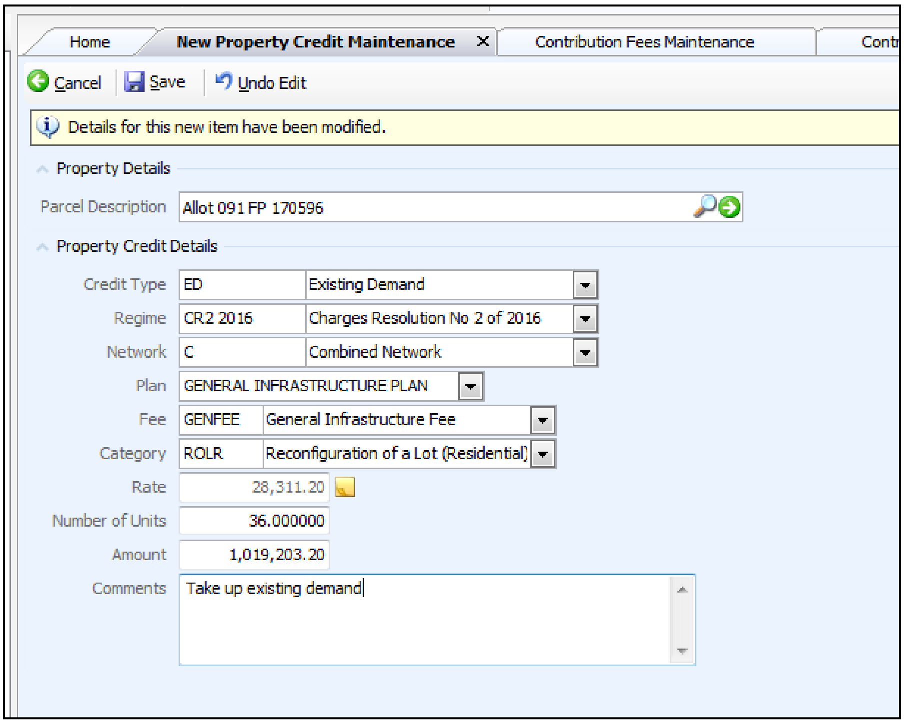
The Fee field then becomes available. All fees linked to the Plan will be available.

After entry of the Fee the appropriate Minor Development Categories are displayed. (The Major Development Category is known as it is linked to the Regime / Network.)

Once the Minor Development Category has been selected the Rate will be displayed. This Rate may be overridden by the user if required.

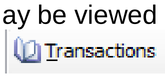
The number of Property Credit Units may then be entered and the amount will be calculated.

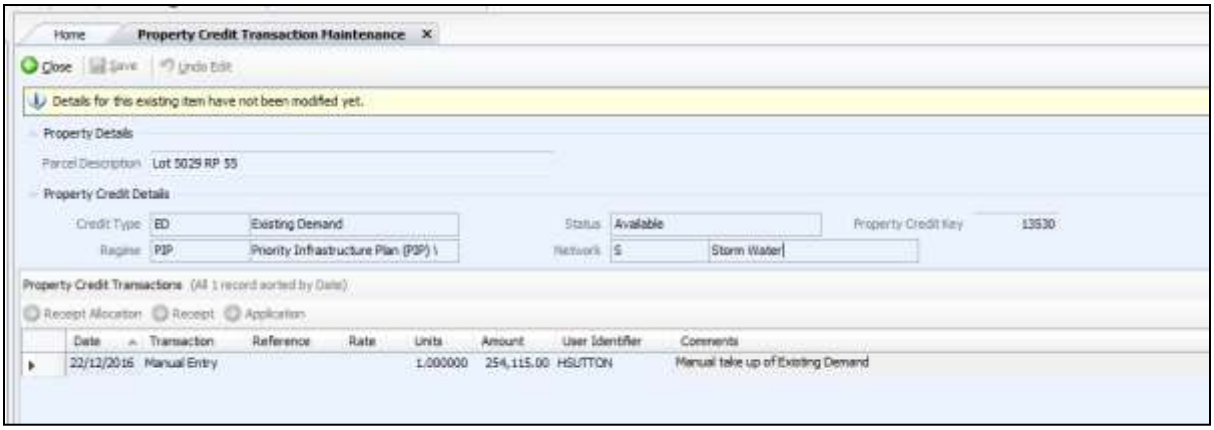
Alternatively, the Amount may be entered directly and the number of units will be calculated. Comments are mandatory.



Property Credit Transactions

Whenever a process is performed on a Property Credit (including its original creation) a Transaction record will be written using the appropriate Transaction Type.

The Property Credit Transactions may be viewed by getting focus on the Property Credit line and clicking on the Transactions button. 



The only modification allowed on this form is the changing of the Comments against a transaction.

Property Credit Transaction Types

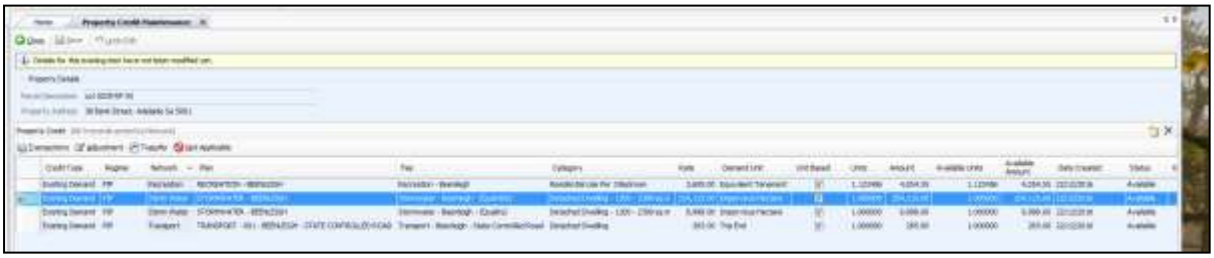
The following are the system level Property Credit Transaction Types.

Receipt
Receipt Reversal
Created via Offset
Offset Reversed
Manual Entry
Refund

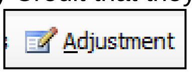
Refund Reversal
Allocated to Application
Allocation Reversal
Transferred to another property
Transferred from another property
Transfer reversal
Not Applicable
Reinstated
Indexation
Indexation Reversal
Adjustment
Created via Allocation
Indexation Rule Change
Pending Allocation
Pending Allocation Reversal
Property Credit Adjustment

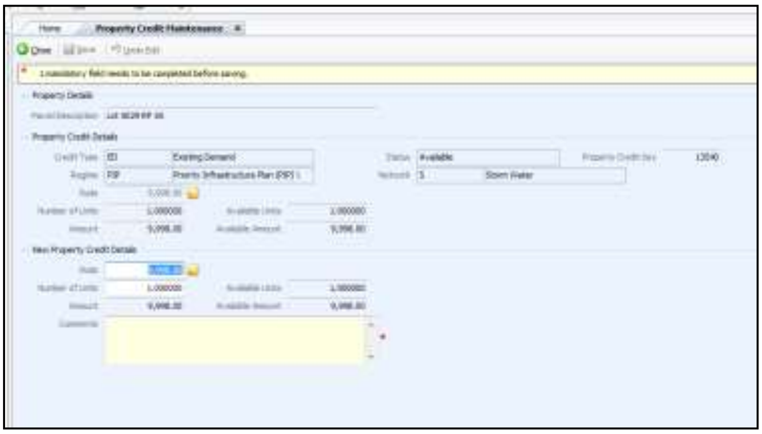
From time to time it may be necessary to manually adjust a Property Credit.

In this following example we will adjust the Number of Units on the Storm Water Network Property Credit.



The user will get focus on the Property Credit that they wish to adjust.

Then click on the Adjustment Button. 



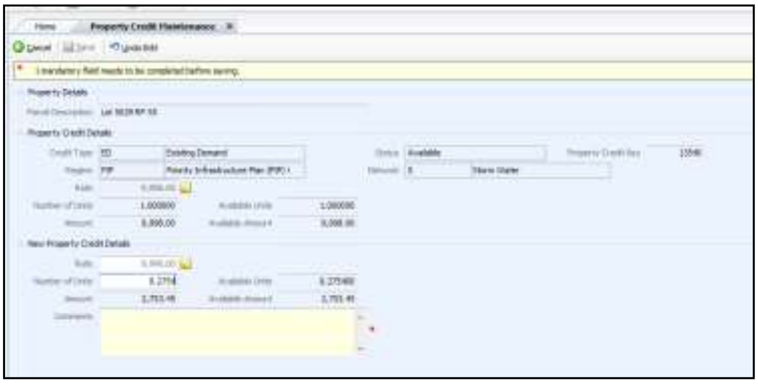
On this form the user may adjust various aspects of the Property Credit.

The Rate may be overridden with a manual rate. (Any manual rates entered will be Indexed on the Property Credit.)

The Number of Units may be changed (up or down).

The Comments field is mandatory.

In this example the Number of Units will be adjusted down as it was entered in error. Up to 6 decimal places may be entered.

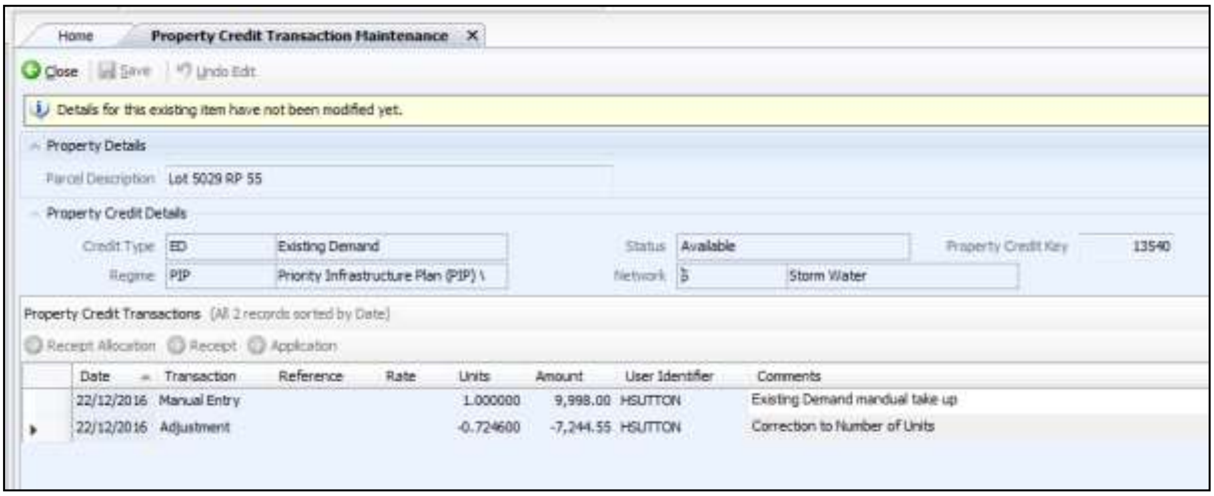


By entering the new value, the “Available Units”, “Amount” and “Available Amount” fields have been adjusted accordingly.

The user would enter a Comment (which is mandatory) and press Save.

The changed details will be displayed on the Property Credit Maintenance form.

To view the transactions, click on the Transactions button.



A Property Credit Transaction has been written.

The Transaction shows the amount by which the Property Credit has been adjusted.

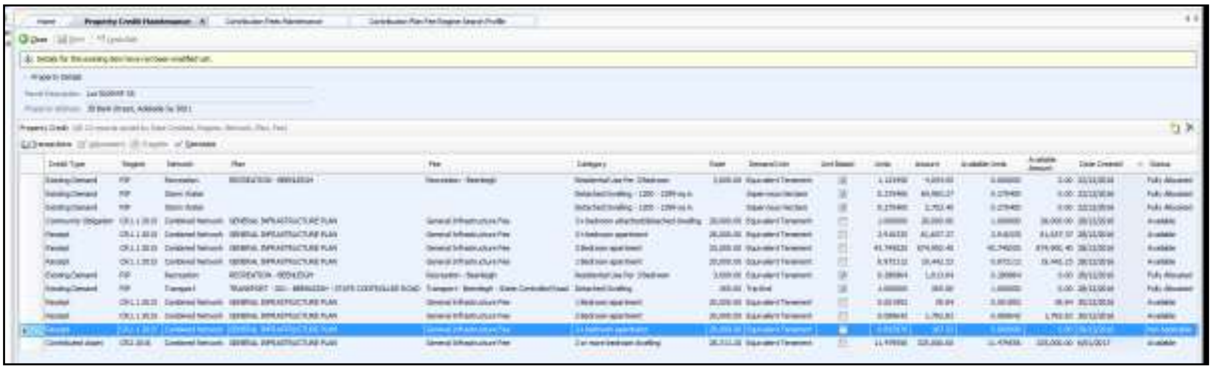
Not Applicable

The “Not Applicable” function has been provided to allow the user to set a Property Credit available units/amounts to zero. The Property Credit may have a small balance that needs to be ‘written off’ and this can be done quite simply with this function. 

The Property Credit Status will be updated to “Non-Applicable” and a Property Credit Transaction will be written with a transaction type of Not Application.

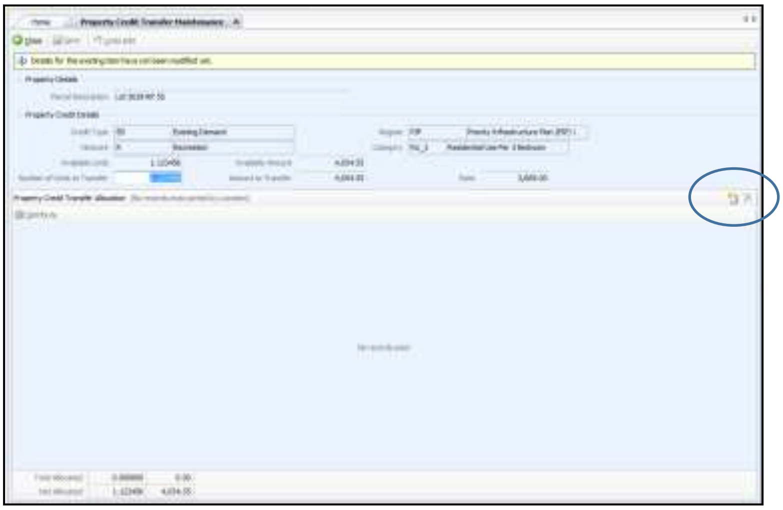
A Property Credit with a status of Non Applicable will not be able to be allocated to Infrastructure Charges.

Indexation will not be applied to “Non- Applicable” Property Credits.



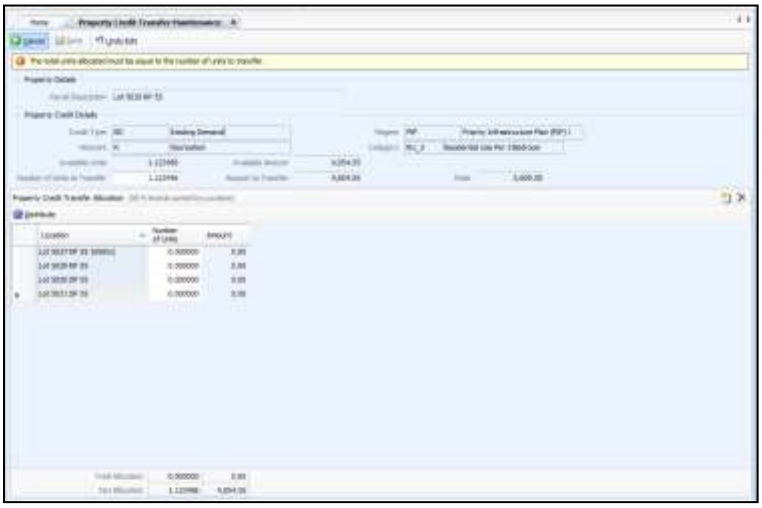
Property Credit Transfers

Where a Property Credit exists that needs to be disbursed to other properties/parcels the Transfer function will be used. 



The user clicks on the Insert Button. The standard Property/Parcel search profile is presented and the user searches for the appropriate locations to transfer the credits to.

The Property/Parcel may be multi-selected back to the Property Credit Transfer form.



The user may keep adding and deleting properties as required until all properties have been loaded.

Depending on the type of Regime (Unit or Dollar based) the Number of Units to Transfer or the Amount to Transfer is shown in the top of the form. This reflects the total available to be transferred across the selected properties.

The Transfer Amount may be changed if required. It cannot be set to more than what exists currently on the property credit.

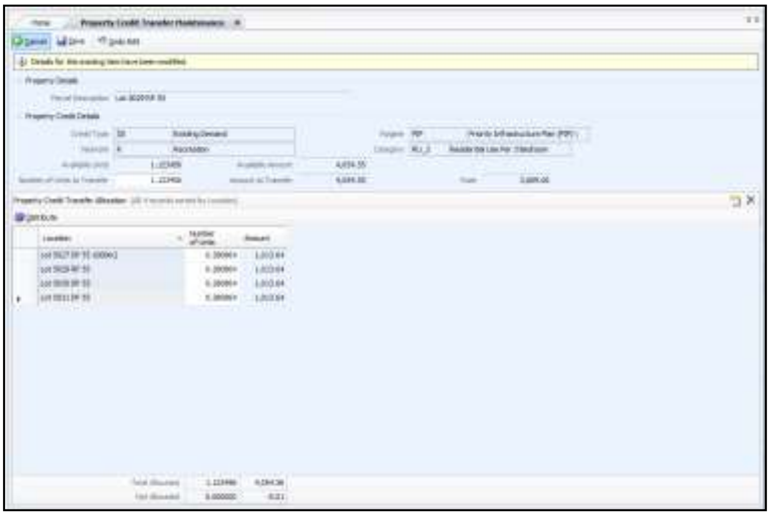
You cannot transfer more than what is entered in the 'available' credits.

The Distribute Button 

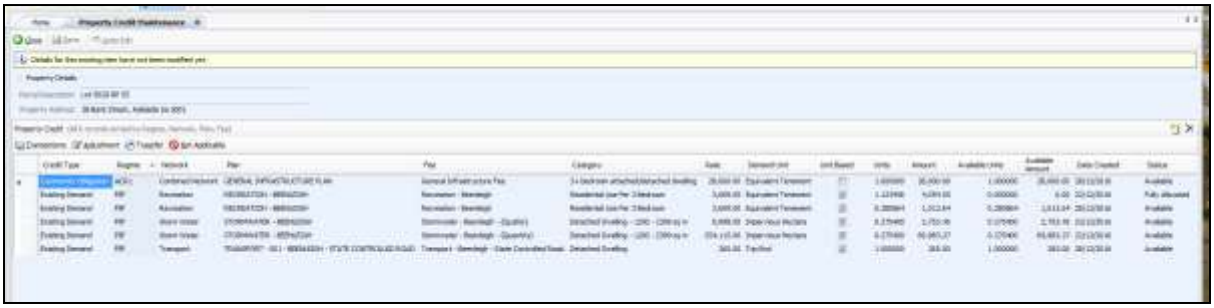
will split the available credit as evenly as possible across the selected locations.

The transfer units or amounts (as applicable) may be overridden as required.

The Distribute Button may be used as many times as required and will remove any manual settings and re-calculate the distribution.



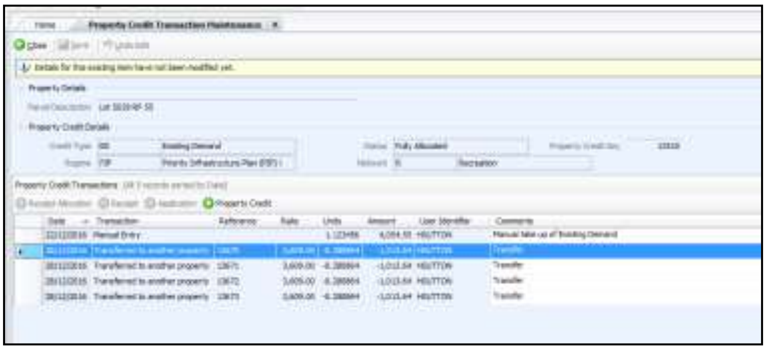
The user presses Save when the form is complete.



In the example above the originating Property Credit has been updated to Fully Allocated.

A new Property Credit line has been written because the property was selected as part of the 'transfer to' list of allocations. If this had not been the case, then this property would not have any remaining credit for the Recreation Network under PIP.

Each transfer will have a Property Credit transaction record written. Click on the Transactions Button to view the transactions.



In the screen shot above a transaction line has been written for each transfer.

The Property Credit button 

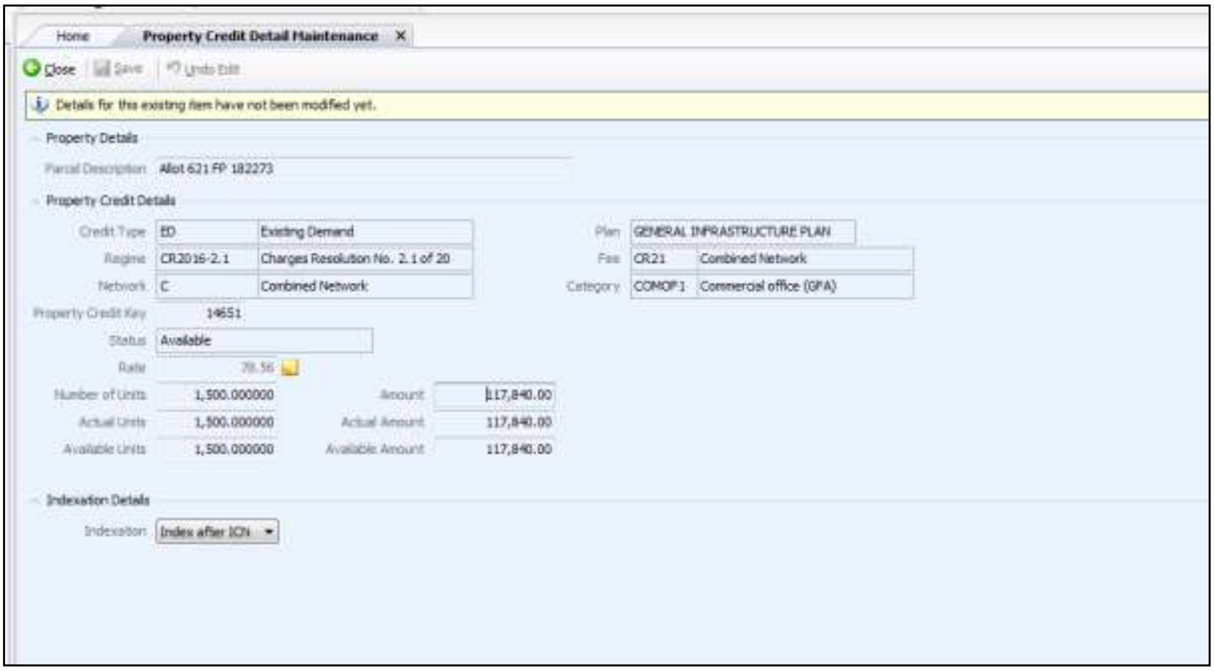
may be used to 'drill out' to the destination property credit.

Property Credit Detail Maintenance

This form is accessible using the "Maintain" Icon 

on the Property Credit Maintenance Form.

The form summarises all balances and details for the Property Credit and allows certain non-financial aspects to be maintained. Currently only the Indexation rule is maintainable on this form.



Property Credit Allocation to an Application

Overview

Property Credits are allocated to Contribution Fees via the Application.

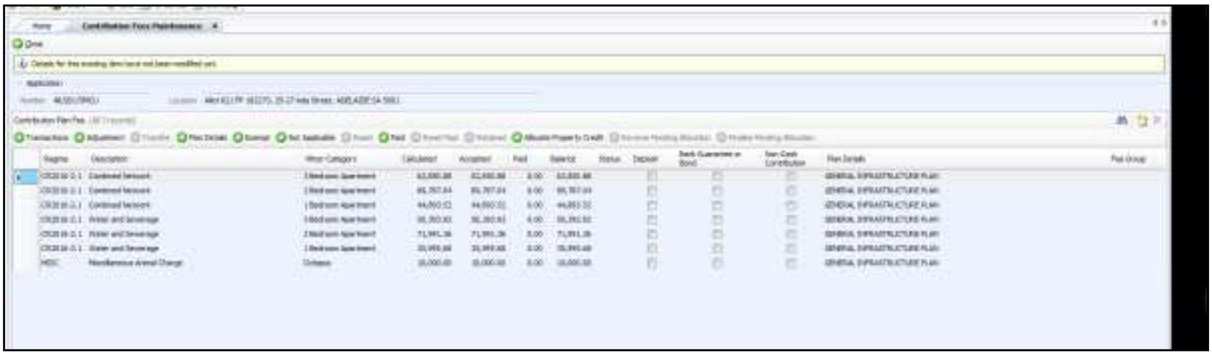
When a Property Credit is first applied a "Pending Allocation" transaction type will be written to the Property Credit record and the Available credit will be reduced.

If another Application is lodged that requires the Property Credit to be assigned to it, then the "Reverse Pending Allocation" function will reverse the allocation which makes it available to another Application.

The last function is to "Finalise" the allocation of the Property Credit.

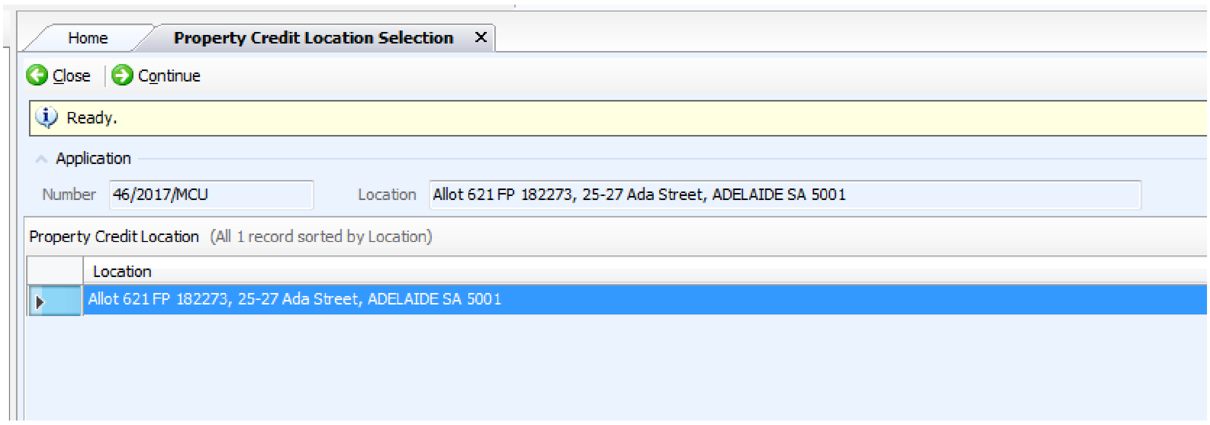
Allocate Property Credit (Pending Allocation)

Where a Property Credit is to be allocated to Contribution Fees on an Application the user will go to the Fees Maintenance form on the Application concerned.



The Allocate Property Credit button will then be pressed. 

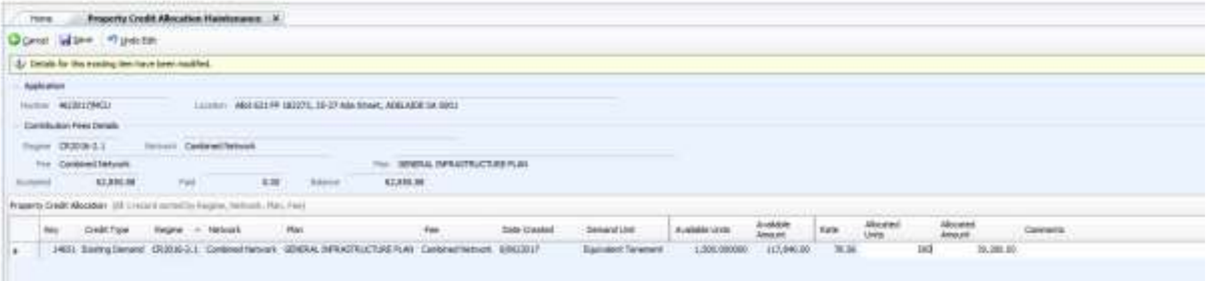
The Property Credit Location Selection form will be displayed, defaulted with the properties specified on the Application pre-loaded.



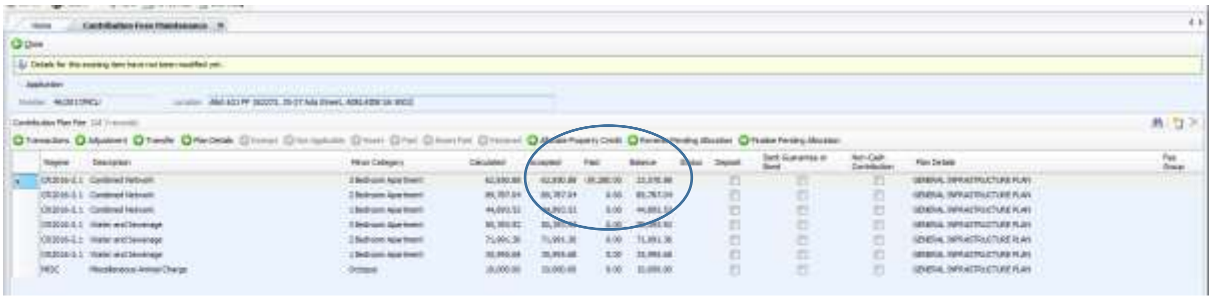
Other Properties not on the Application may be added to this list.

The user selects the required location then presses Continue. All valid Property Credits (as per the Regime/Network settings) will be displayed.

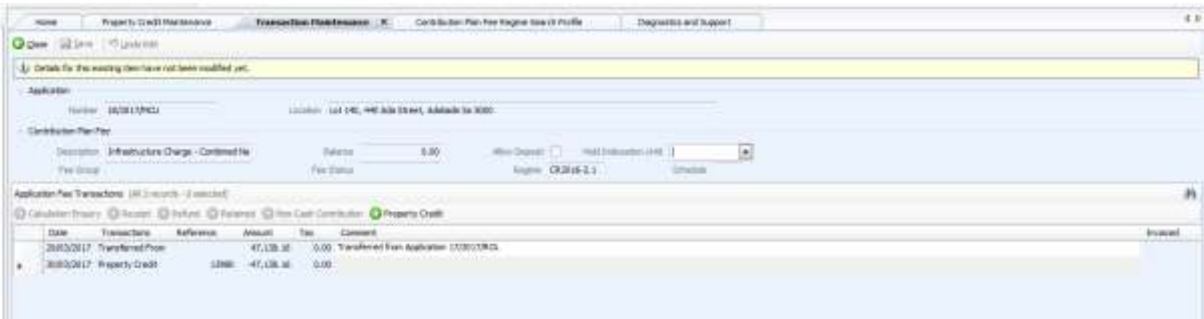
The user enters the amount (either Units or Amount) they wish to transfer to the Application in the Allocated Unit/Amount column, enters a Comment and presses Save. The Allocated Amount cannot be greater than the Available Amount on the Property Credit.



The credit is then reflected back against the Contribution Fee.



Going to the fee transaction screen you can see a Fee Transaction is written with a Transaction Type of Property Credit.



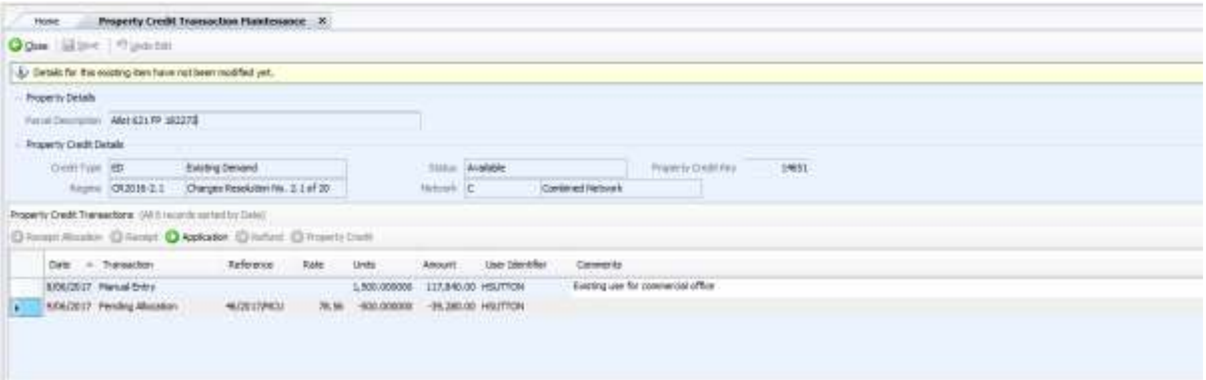
The user is able to ‘drill out’ to the source credit by clicking on the Property Credit Button. The source credit will be highlighted.

In the screen shot below you can see that the Source Property Credit has been reduced by the amount allocated to the Application.

A matching Property Credit Transaction is written to the Property Credit records.

The source Property Credit shows the allocation to the Application.

Note that the transaction has been written as a Pending Allocation.



Reverse Pending Allocation

This Property Credit Allocation may be reversed from the Contribution Fee when required. Another Application may have been received and the Property Credit is required to be transferred to it.

The user clicks on the “Reverse Pending Allocation” button on the Contribution Fees Maintenance Form.

Processing is automatic. The Property Credit will have a “Pending Allocation Reversal” transaction written to it and the Contribution Fee will have a “Property Credit Reversal” transaction written.

The Property Credit Available Amount (and Units) has been recalculated.

The Property Credit may now be allocated to another Application.

Finalise Pending Allocation

When the Property Credit is to be finalized the following will occur.

There is no change to the Contribution Fee.

The Property Credit will have an “Allocated to Application” transaction written.

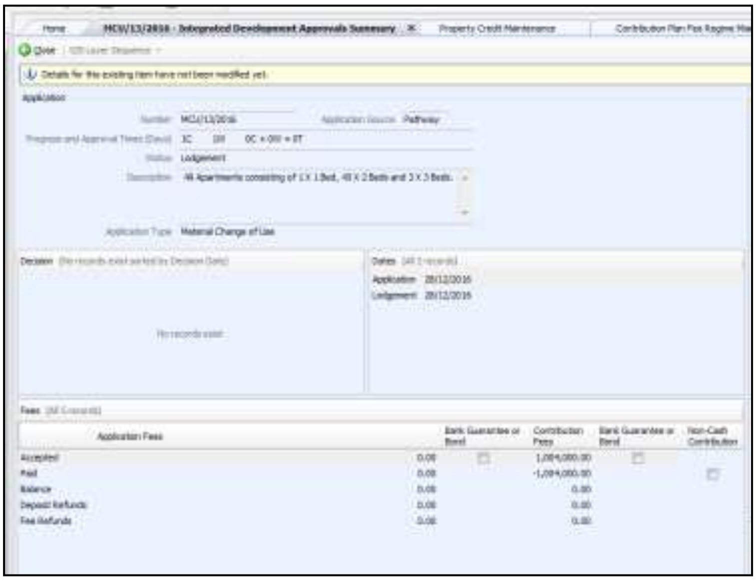
A new Property Credit will be created reflecting the value of the transaction and taking on the attributes of the Contribution Fee to which is was assigned. In the example below a new Property

Credit has been created with a value of 39,280.00 and the Units were calculated automatically (Value / Rate).

If the balance of the source Property Credit is less than or equal to the tolerance value on the Property Credit System Parameter, the balance of the Property Credit will be adjusted to zero and the status will be set to ‘Fully Allocated. An ‘Adjustment’ transaction will be written with the comment ’Adjusted to Zero, outstanding within Tolerance level.’.

Property Credit creation via Receipts

When a Contribution Fee is paid via Receipting that receipt is reflected against the fee in the normal way.



A corresponding receipt entry is written to the **Property Credit Receipt Allocation** table.

This function is available via Applications >> Development Contributions >> Property Credit Receipt Allocation Maintenance.

The receipt is broken up into its component parts as per the Contribution Fee that it paid.

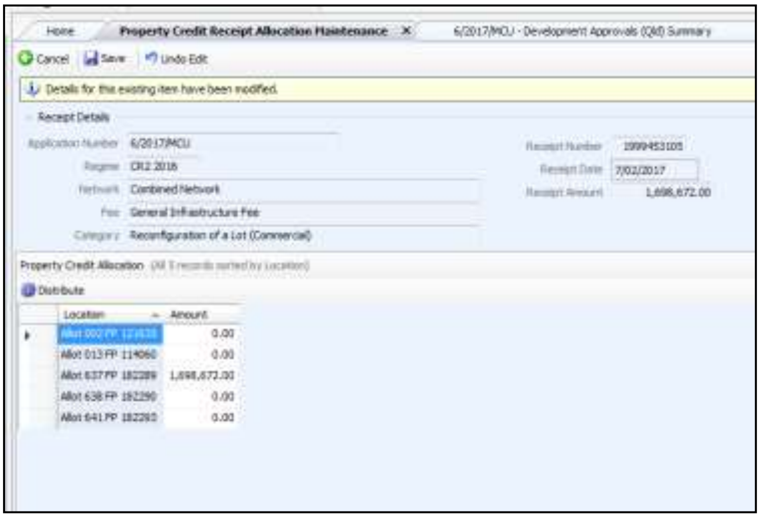
Checking on the “Unallocated Only” flag limits the display to receipts that have not been allocated to Property Credits. The exception to this is “Reversed” receipts that have not been allocated. “Reversed, Unallocated” records will not be returned when the “Unallocated Only” flag is used.

The user selects a record a presses Modify.

The Property Credit Receipt Allocation form is displayed.

The form is loaded with the appropriate Property Locations and the amount of the receipt.

The Insert Button is available to enable other Property Locations to be selected.



The user may click on the Distribute Button to equally apply the receipt amount across the Property Locations.

The user may override the amounts if required.

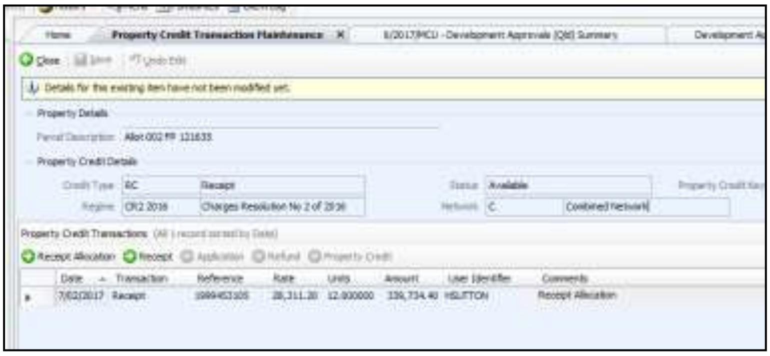
The Amount total must equal the Receipt Amount.

Save is pressed to save the record and the user is returned to the search profile.

(Note that the record just processed is removed from the list as it is now “Allocated”)

A new Property Credit has been created which reflects the Contribution Fee that was paid by the Receipt.

A transaction has also been written.



From this transaction the user is able to ‘drill out’ to either the Property Credit Receipt Allocation record or the actual Receipt.

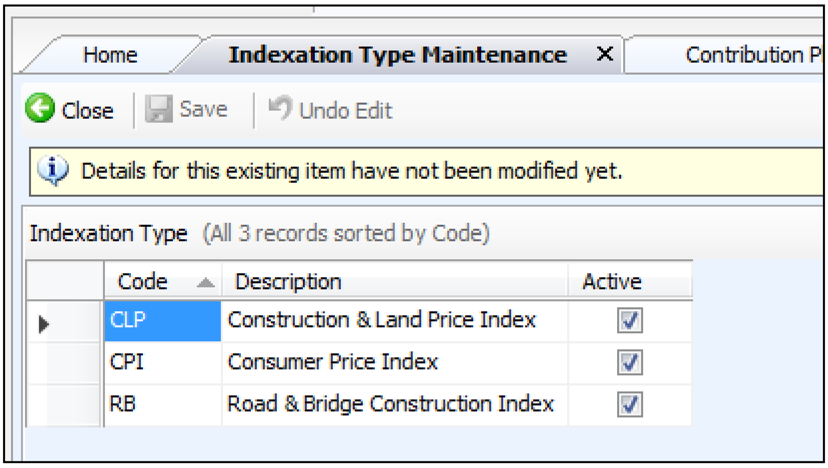
Combined Indexation

Please note that significant changes are currently being made to this process.

New functionality has been developed to cater for the combination of Indexation across Contribution Fee Parameters, Contribution Fees and Property Credits.

Indexation Type Maintenance

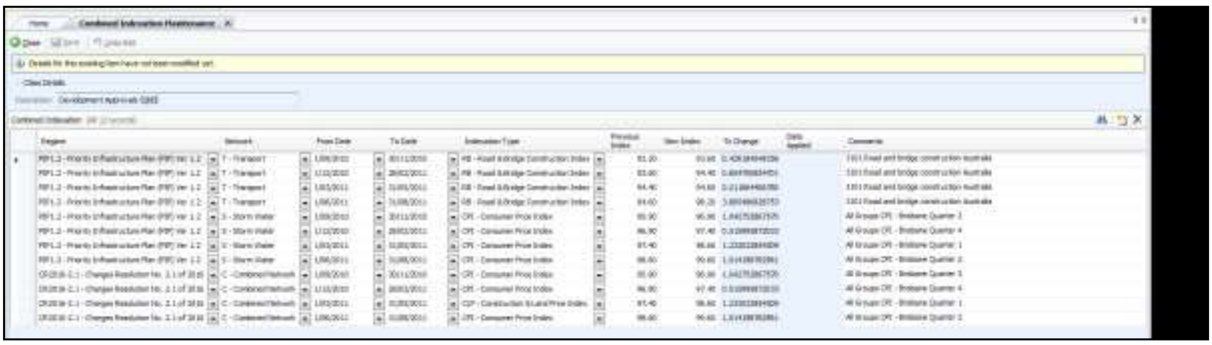
A new form has been created for the maintenance of Indexation Types.



Combined Indexation Maintenance

This option will allow for the creation of Indexation processes.

The form is accessed via: Applications >> Development Contributions >> Combined Indexation Maintenance



Pressing the Insert Button will add a new row ready for entry.

All of the records that do not have a "Date Applied" will be updated on the next Indexation Update run.

These records are created and the indexation update process will be applied as per the settings in these records.

In this way, the customer may set up multiple different indexation runs each with their unique settings.

A record may be deleted if the Date Applied is blank.

The Previous Index will be entered by the user.

The New Index will be entered by the user.

Pathway will calculate the % Change between the two Indexes (Previous Index, New Index) and display the value.

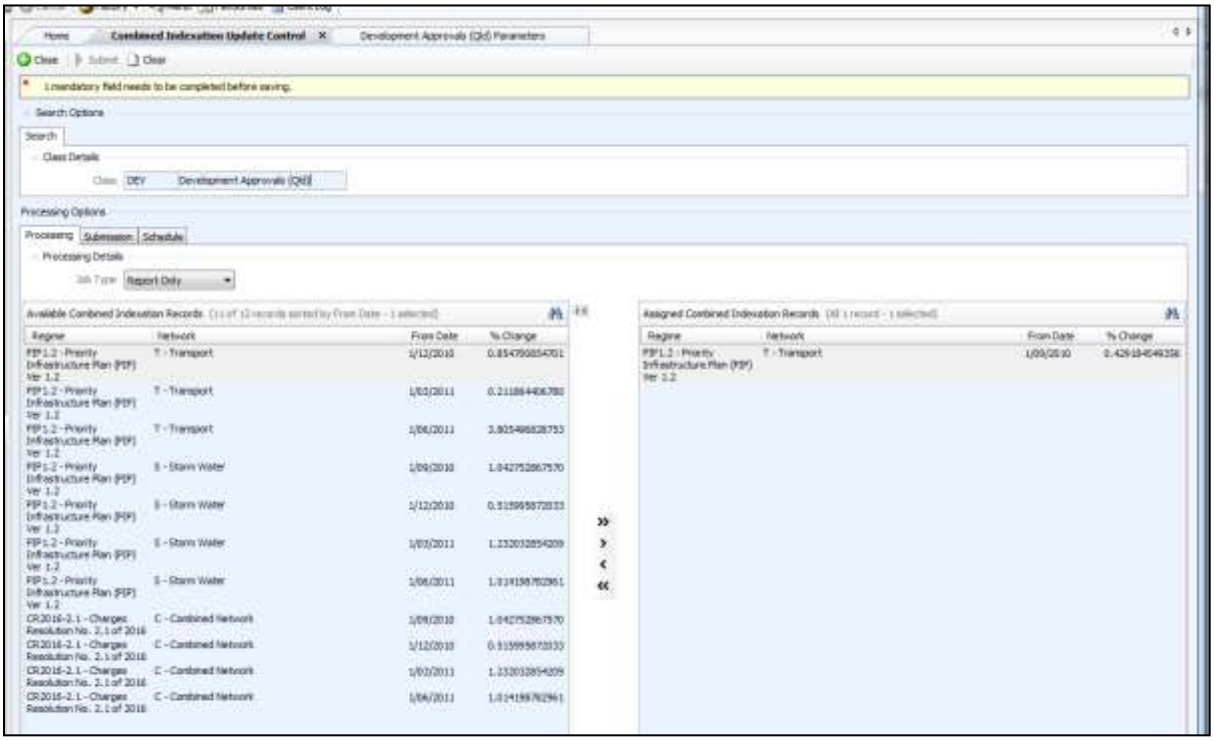
Combined Indexation Update

PLEASE NOTE: This function will be undergoing some major re-work.

This option will update the Contribution Fee Parameters, Application Contribution Fees and Property Credits.

The form is accessed via:

Applications >> Development Contributions >> Combined Indexation Update



Job Type: Report Only – No updates will be performed.
Job Type: Update & Report – The data will be updated and a report produced.

The left column contains all of the available records from the Combined Indexation Maintenance form that have not yet been updated.

One, many or all available records may be selected for Update.

There are three individual components to the Combined Indexation Update.

Contribution Fee Parameters
Contribution Fees on Applications
Property Credits

The report data is held in:

LRPAP86 - Combined Indexation Details
LRPAP87 - Combined Indexation Fee Code
LRPAP88 - Combined Indexation Application Fee
LRPAP89 - Combined Indexation Property Credit

Example – Fee Code update

Form: LAPR7341 Release Environment Page: 1
User: HSUTTON Combined Indexation Fee Code Update Report 03-Apr-2017 08:33:27
CR2016-2.1 - Charges Resolution No. 2.1 of 2016

Regime	Network Plan Number Fee Type Major Category Minor Category Dimension Type	From Date	To Date	Type	Previous Index Previous Amount/ET Charge Rate	New Index New Amount/ET Charge Rate	% Change Messages
CR2016-2.1	C GENERAL INFRASTRUCTURE PLAN Combined Network Infrastructure - Charges Resolution 2.1 of 2016 1 or 2 bedroom cabin Number of Dwellings	01-Sep-2010	30-Nov-2010	CPI	95.90 5,611.69	96.90 5,670.21	1.042752867570
CR2016-2.1	C GENERAL INFRASTRUCTURE PLAN Combined Network Infrastructure - Charges Resolution 2.1 of 2016 1 or 2 bedroom dwelling Number of dwellings	01-Sep-2010	30-Nov-2010	CPI	95.90 11,223.38	96.90 11,340.41	1.042752867570
CR2016-2.1	C GENERAL INFRASTRUCTURE PLAN Combined Network Infrastructure - Charges Resolution 2.1 of 2016 1 or 2 bedroom relocatable dwelling site Number of dwellings	01-Sep-2010	30-Nov-2010	CPI	95.90 11,223.38	96.90 11,340.41	1.042752867570

Example – Application Fee Update

Form: LAPR7342 Release Environment Page: 1
User: HSUTTON Combined Indexation Application Fee Update Report 03-Apr-2017 08:33:27
CR2016-2.1 - Charges Resolution No. 2.1 of 2016

Regime	Network Plan Number Fee Type Major Category Minor Category Dimension Type	From Date	To Date	Type	Previous Index Previous Amount/ET Charge Rate	New Index New Amount/ET Charge Rate	% Change Messages
CR2016-2.1	C 17/2017/ROL GENERAL INFRASTRUCTURE PLAN Combined Network Accomodation Lodging House	01-Sep-2010	30-Nov-2010	CPI	95.90 31,425.44	96.90 31,753.13	1.042752867570
CR2016-2.1	C 17/2017/ROL GENERAL INFRASTRUCTURE PLAN Water and Sewerage Accomodation Lodging House	01-Sep-2010	30-Nov-2010	CPI	95.90 37,795.44	96.90 38,189.55	1.042752867570

Example – Property Credit Update

Form: LAPR7343 | Release Environment | Page: 1
User: HSUTTON | Combined Indexation Property Credit Update Report | 03-Apr-2017 08:33:27
CR2016-2.1 - Charges Resolution No. 2.1 of 2016

Regime	Network Plan Number Fee Type Major Category Minor Category Dimension Type	From Date	To Date	Type	Previous Index Previous Amount/ET Charge Rate	New Index New Amount/ET Charge Rate	% Change Messages
CR2016-2.1	C Lot 140, 440 Ade Street, Adelaide Sa 5000 GENERAL INFRASTRUCTURE PLAN Combined Network Infrastructure - Charges Resolution 2.1 of 2016 Reconfiguration of a Lot (Residential)	01-Sep-2010	30-Nov-2010	CPI	95.90 15,712.72	96.90 15,876.56	1.042752867570
CR2016-2.1	C Lot 140, 440 Ade Street, Adelaide Sa 5000 GENERAL INFRASTRUCTURE PLAN Combined Network Infrastructure - Charges Resolution 2.1 of 2016 Reconfiguration of a Lot (Residential)	01-Sep-2010	30-Nov-2010	CPI	95.90 15,712.72	96.90 15,876.56	1.042752867570

Indexation of Contribution Fee Parameters

Dollar based and Unit Based Regimes are included.

Only ACTIVE Fees on the Network/Regime across all Plans will be considered.
A new fee period is created and the settings (major/minor/dimensions) are copied from the previous period.

The date of the fee period will be the run date.

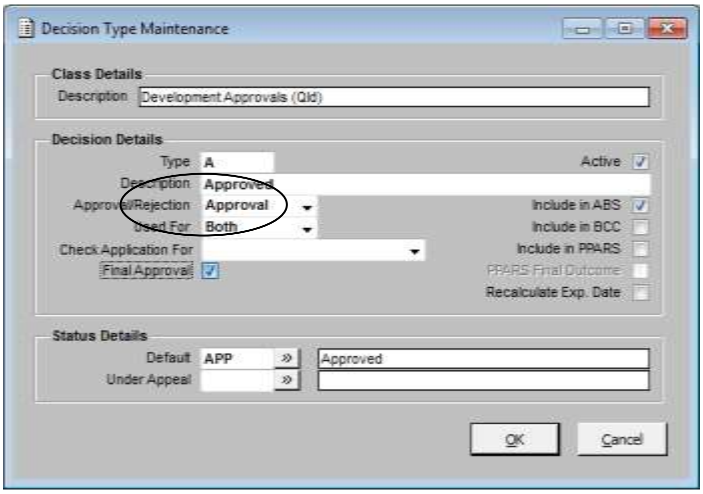
The calculation is over the Charge Rate and the Amount/ET where values exist.
LAPMIFD.Rate
LAPMIFC.ETRate
The Rate values are updated with the %Change value. (Note that this could be a positive or negative % change.)

The calculated Rate is always written even though it may calculate higher than the Maximum or lower than the 'first' Rate.

Indexation of Application Contribution Fees

Indexation can only be applied to contribution fees where there is a Decision and Merge Type (final) on the Application. (The Merge Types are established at the Regime Parameter level).

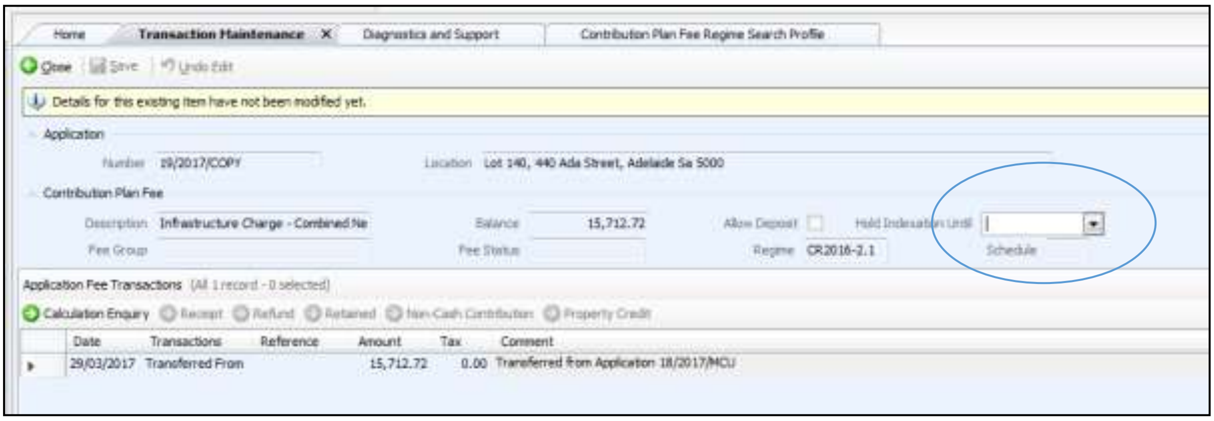
To determine whether an Application should be indexed there must be an "Approval" Decision on the Application that is marked as "Final".



There must also exist a Document Request record for a matching selected Merge Type which has been 'final printed'.

There is also another check on the start date for indexation on the Contribution Fee itself.

A new date field has been provided on the Transaction Maintenance form. Hold Indexation Until dd/mm/yyyy



When assessing a Fee for the calculation of Indexation then if the value in this field is greater than the run date then the fee will be skipped.

If the balance of the fee is zero then the fee should be skipped.

Indexation will be calculated on the balance of the outstanding Contribution Fee.

If the Indexation would result in the Fee going over the Maximum Charge Rate then no indexation will be calculated. (Please note that a Zero Transaction will be written.)

If the Indexation would result in the Fee going below the original Charge Rate (due to a negative %change) then no indexation will be calculated. (Please note that a Zero Transaction will be written.)

Indexation will not resume until the Fee calculation on the Application is aligned to rate at which it was raised.

Indexation of Property Credits

Only Property Credits with a Status of “Available” will be Indexed.

If the Property Credit does NOT have an overriding Rate………

Using the Regime / Network / Plan / Fee / Category and taking the number of Available Units calculate the amount using the new indexed Rate.
A new Property Credit Transaction is written with a transaction type of “Indexation” for the change in value (up or down).

If the Property Credit HAS an overriding Rate………

Only Property Credits with a Status of “Available” will be Indexed.
The overriding Rate that is currently on the Property Credit is used and a new overriding Rate will be written based on the %Change for the Indexation run.
The overriding Rate is overridden with the new overriding Rate.
The Available Units are then multiplied by the new overriding Rate to calculate a new Available Amount.
A new Property Credit Transaction is written with a transaction type of “Indexation” for the change in value (up or down).

Infrastructure Offsets

Overview

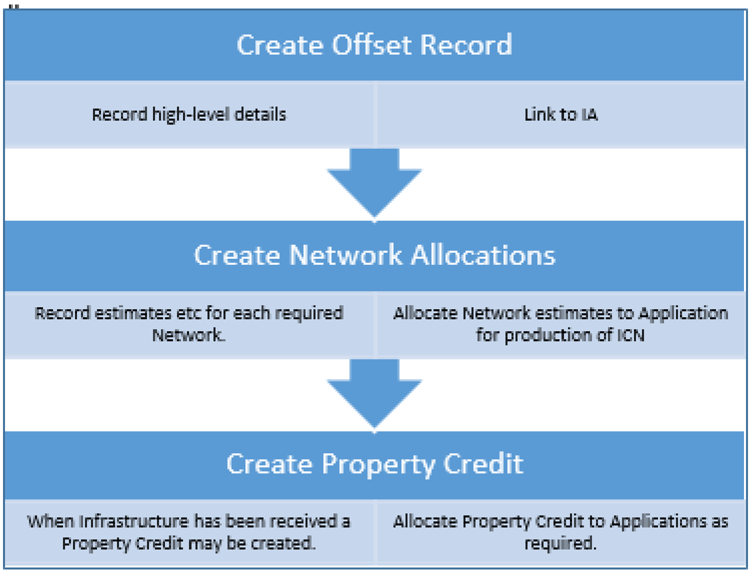
This option is available via Applications >> Development Contributions >> Infrastructure Offsets Maintenance.

Offset records are created as required.

The offset may be linked to an Infrastructure Agreement Record (Application).

The offset may be linked to Applications that will be the target of the provision of the offsets. This 'linking' does not pay the Contribution Fee, it is merely a link to enable the offset to be printed on an ICN as an Estimate.

Once an offset has been 'received' a Property Credit is created from that offset.

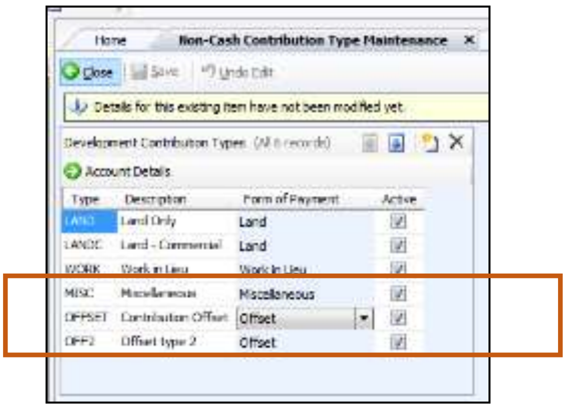


Offset Type Maintenance

This option is available via Applications >> Development Contributions >> Non-Cash Contribution Type Maintenance.

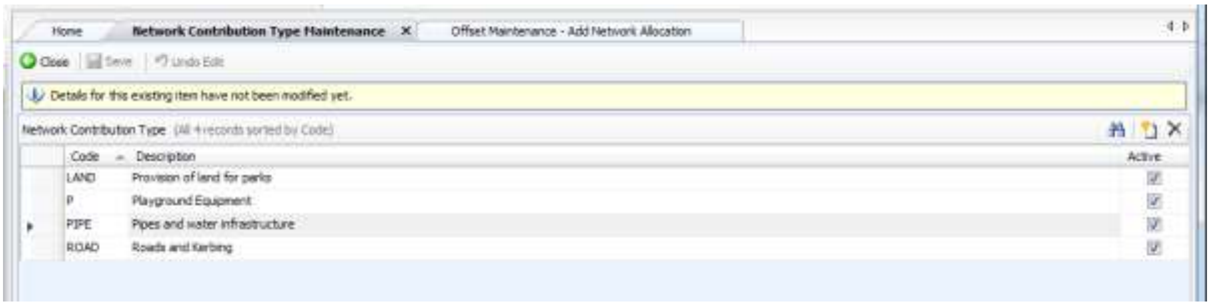
A user defined list of 'offset' types are available. The form also caters for other non-cash types.

Where a type is being established purely for Offsets then the "Form of Payment" **must be Offset**.



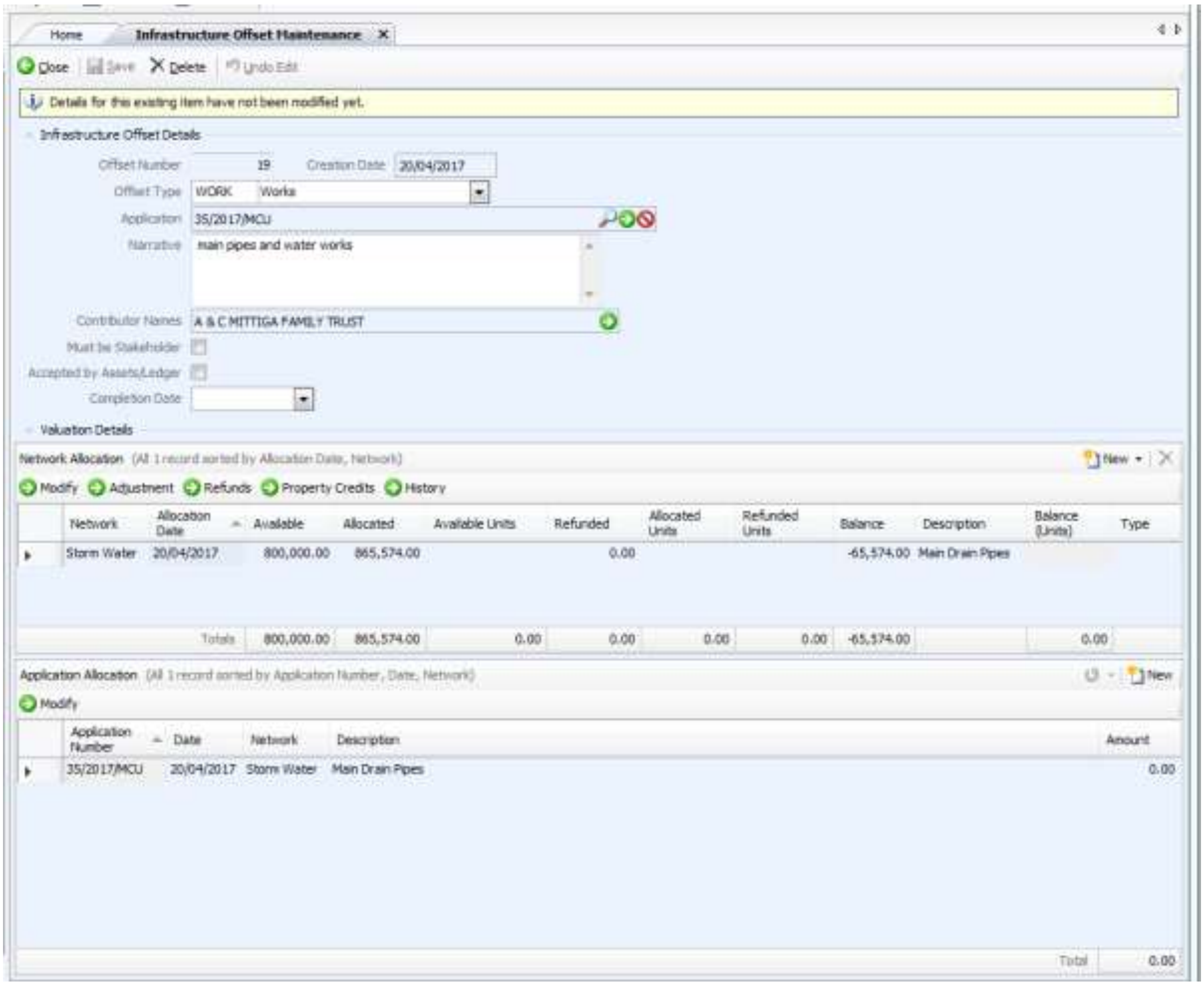
The Offset Type may also be used in Offset Indexation to further separate indexation jobs.

Network Contribution Type
User defined list of codes and descriptions for use against Network Offset records. May be used for reporting.



Offset Maintenance

This option is available via Applications >> Development Contributions >> Infrastructure Offsets Maintenance.



The Offset Maintenance form is divided into 3 horizontal sections.

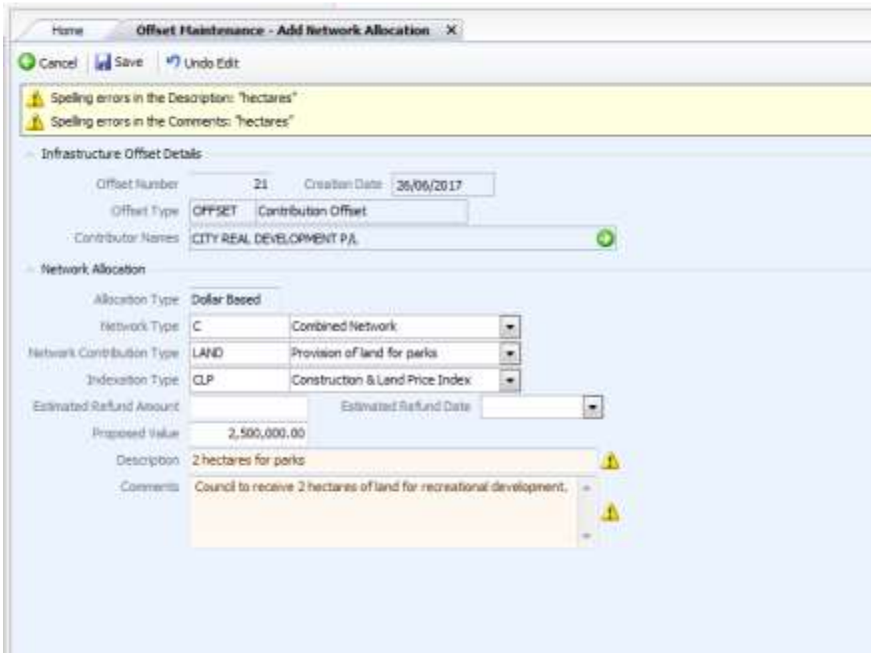
Top Section – The high level details of the Offset record.

Offset number. This is a sequential number allocated by the system at the time of creation of the Offset.
Offset Type: A user defined code that may be used in reporting and searching.
Application: Search for and select the appropriate Infrastructure Agreement record.
Narrative: a free format field describing the Offset.
Contributor Names: Search for and select the Names of the Contributors from the central Name and Address Register. Multiple Names are allowed.

Must be Stakeholder: When a Property Credit is created from the Offset this flag indicates if it can be used only by a Stakeholder on the Application that matches a Contributor on the Offset record.
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 that the asset is taken up. It can be reported on so that the appropriate Financial department can be made aware of it.
Completion Date: The date that the Offset record was 'completed'.

Centre Section – Details of the offsets being provided
The user will press New to create a new Network record.

Create Offset Network Record

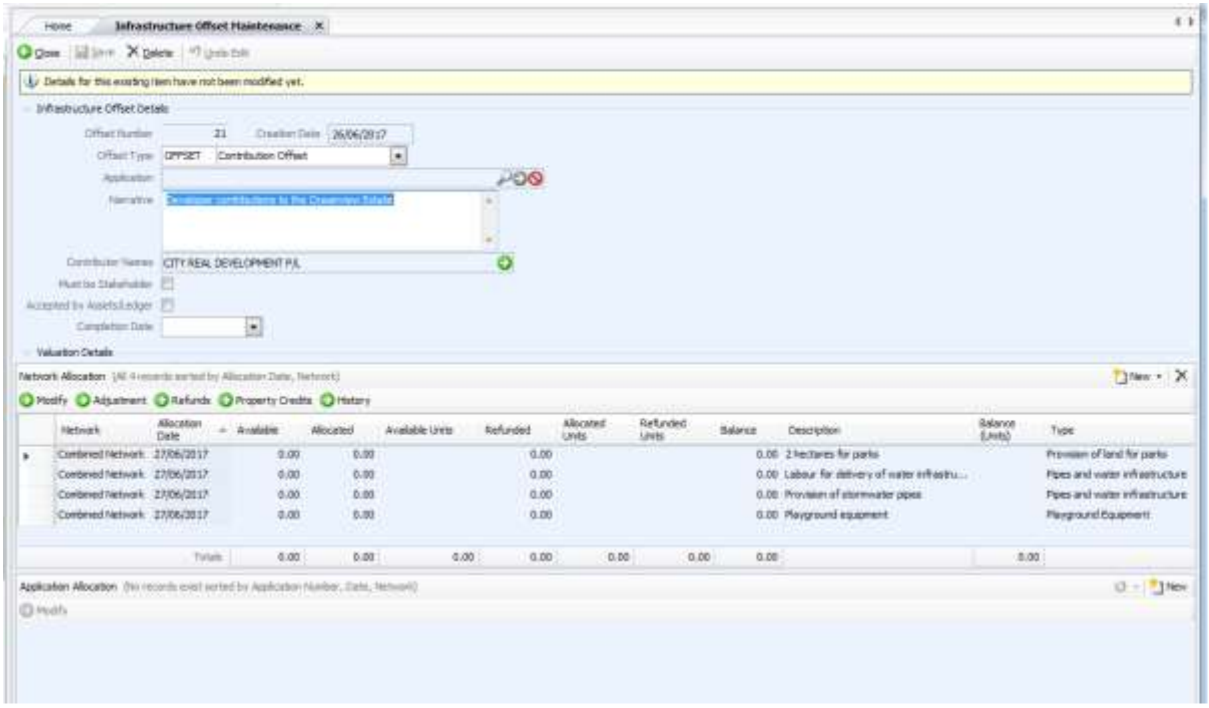


The Network Type is selected from the drop down list.
The Network Contribution Type is selected from the drop down list.
Select the appropriate Indexation Type from the drop down list.
If a Refund is expected from the Offset then the value and the estimated date of the refund may be entered.
The Proposed Value of the offset is entered.
The Description of the offset is entered. This description is available for use on the ICN.
Comments are mandatory and should provide more detailed information for the offset than the description field.

User presses Save to save the record.

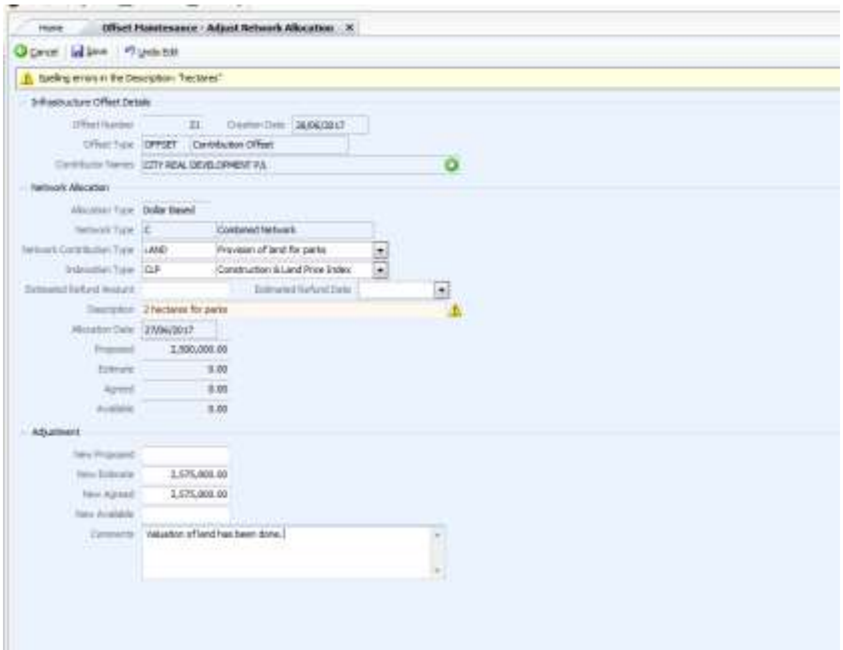
Offset Adjustment
From time to time the Offset record may need to be adjusted.
This is done by pressing the Adjustment Button on the form. 

In this example we can see a newly created offset record.



Pressing the Adjustment Button will present the Adjust Network Allocation form.

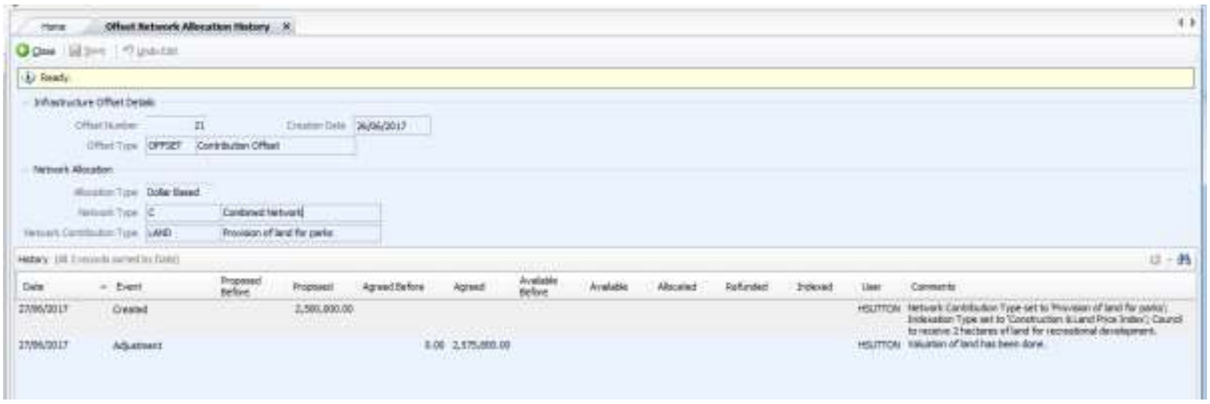
This form allows the user to enter new values for each of the fields indicated.
Not all fields are required.
For example, if you are updating the Estimate value then only that value needs to be entered.
The Comments are mandatory.



A Network Allocation History Transaction is automatically written by the system.

Network Allocation History

To view the transactional history of a record, click on the History Button. 



History transactions are written when various functions are performed and may not be changed, namely:

Creation
Adjustment
Refund
Indexation
Transfer to Property Credits

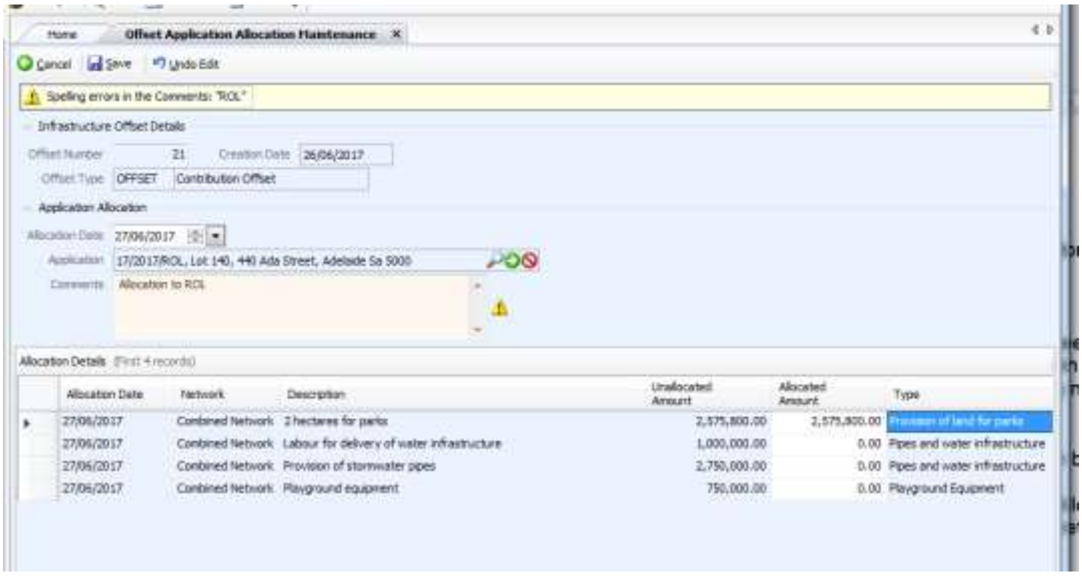
Application Allocation (Application Estimate)

This function is provided to allocate the Offset to an Application as an “Estimate” for use on the ICN.

It does not reduce the Contribution Fee in any way and is shown separately on the notice as an Estimate. (Extract List IONETWALLOC – Infrastructure Offset Network Allocations)

The Infrastructure Offset is visible from the Application using the Infrastructure Offsets Option. (This option will need to be assigned via Applications >> Application Classes)

The user will press the New Button to set up an allocation to an Application.



The Allocation Date is defaulted to ‘today’ however may be changed.

The Application to which the Offset will be linked is selected via the Search button. The standard application Class/Search profile will be displayed.
Comments are mandatory.

The network records and the total amount of the Agreed Amount that has not been allocated to any other applications (Unallocated Amount) will be shown. The user will then nominate the amount to be allocated to the Application in the associated field. The amount to allocate may not be greater than the Unallocated Amount or less than zero.

Modify Allocated Amount

If the amount allocated to an Application is incorrect then the Modify Button can be used to open the Application Allocation form and change the Allocated Amount.

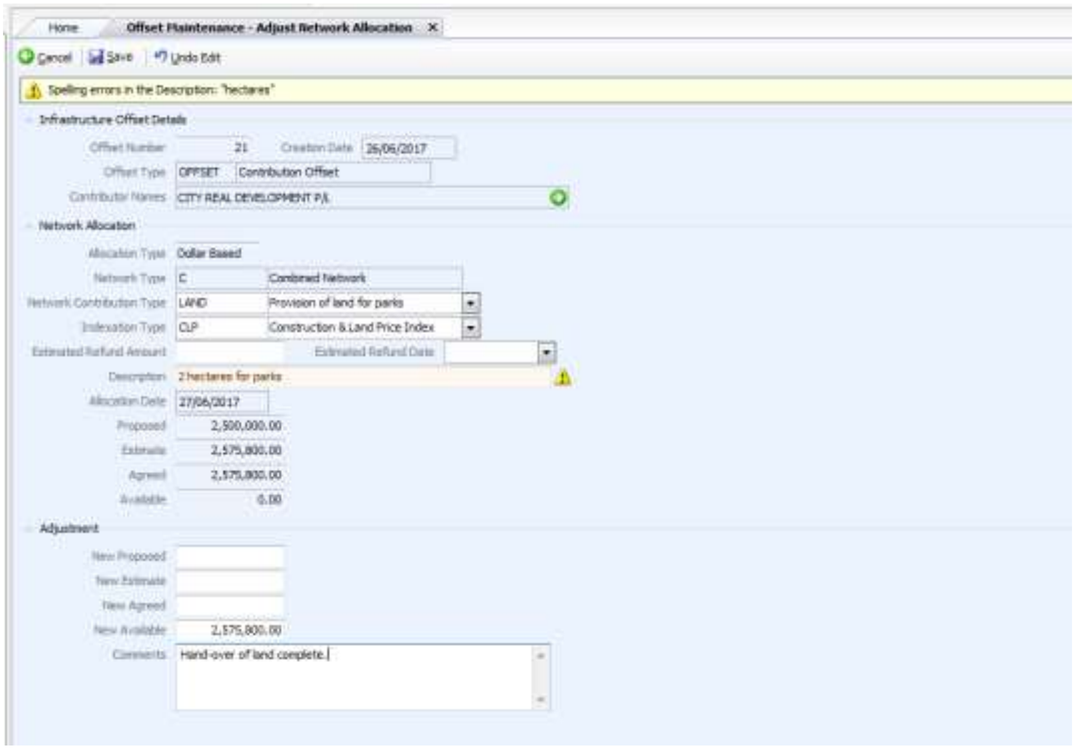
Select the record that you wish to modify and click on the Modify Button. The Allocation form will be displayed and the allocated amount may be changed. Click Save and you will return to the Infrastructure Offset record.

Create Property Credit for delivered infrastructure

At various points within the life of the offset record it may be appropriate to create a Property Credit, which in turn can be used to allocate to Contribution Fees.

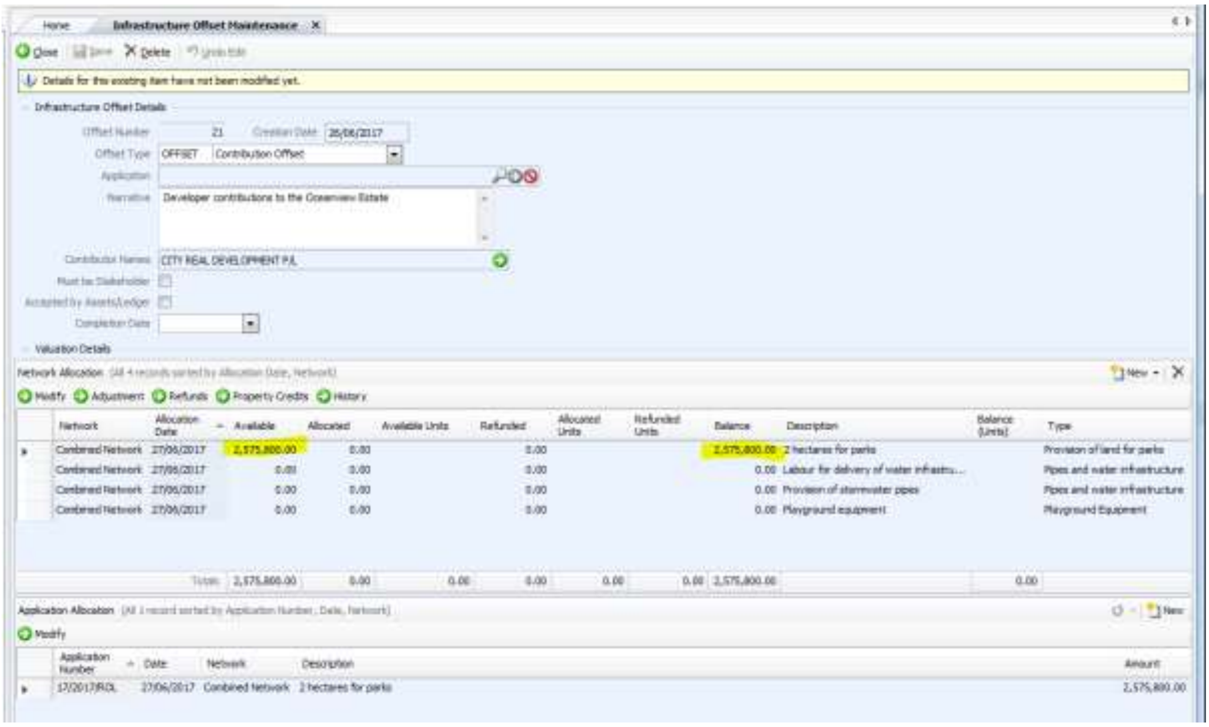
The user will need to update the Offset record to show the delivery value of the Infrastructure.
Open the Offset record via Offset Maintenance.

With the Network row selected click on the Adjustment Button.



In the example above we have 'received' the Land provided for recreation.

This is now reflected in the Offset totals under the "Available" and "Balance" columns.

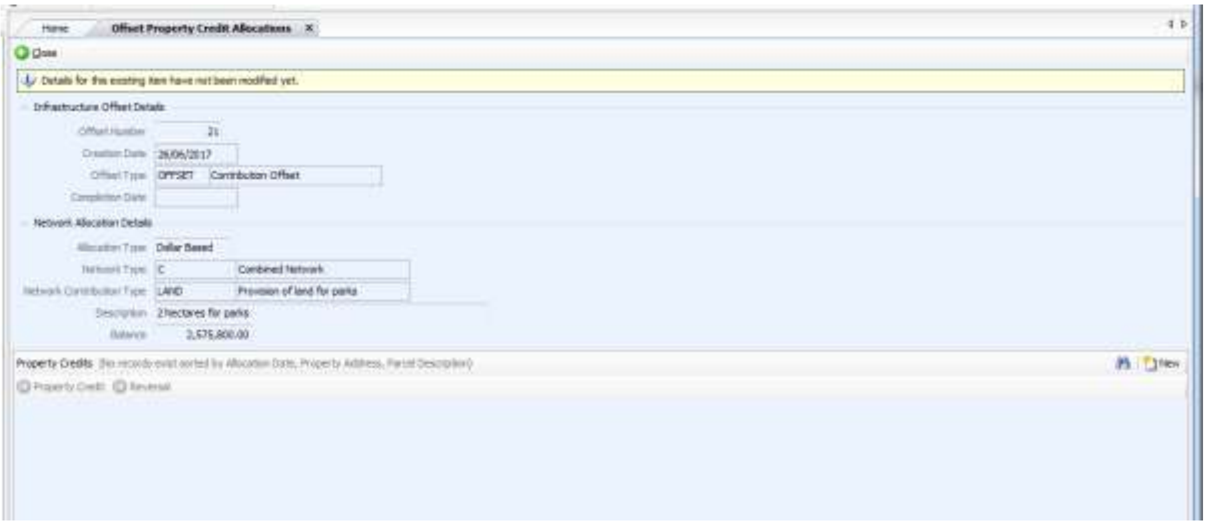


Infrastructure can be ‘received’ in part or in full.

Infrastructure received can be transferred to Property Credits in part or full.

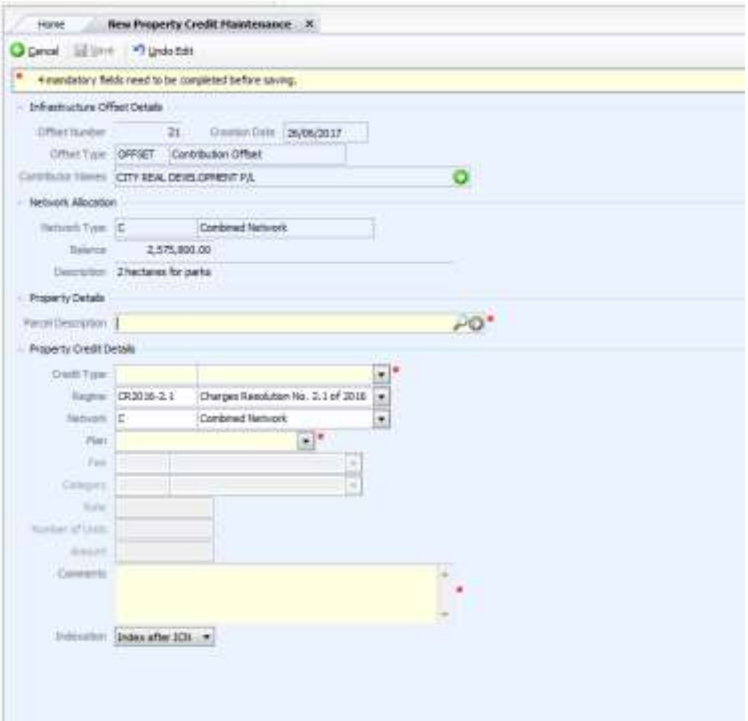
To transfer the “Available” amount to Property Credits the user will select the Network and click on the Property Credits Button.

The Offset Property Credit Allocations form will be displayed.

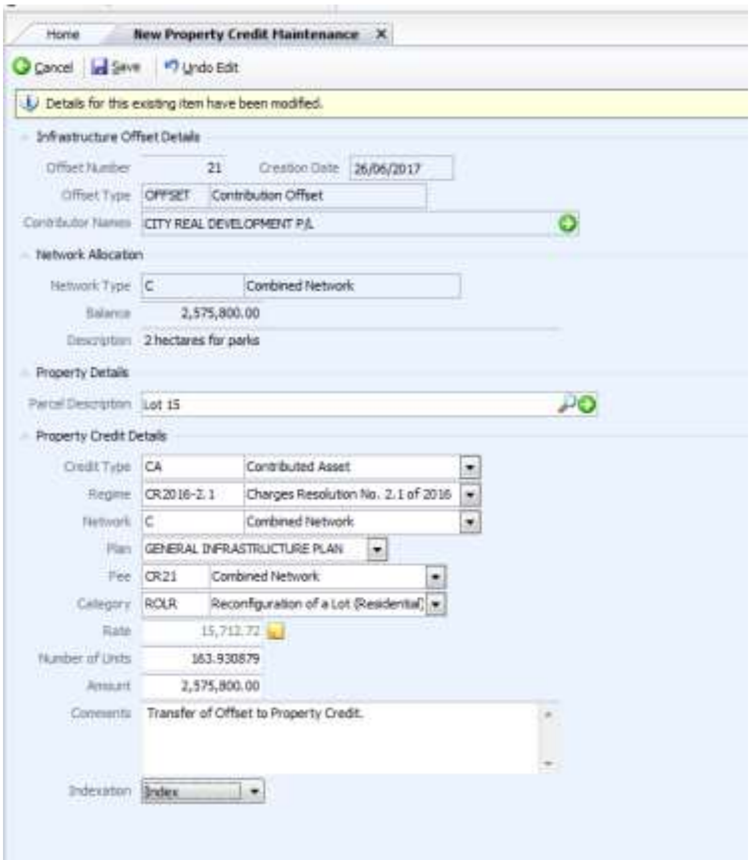


The user will then click New.

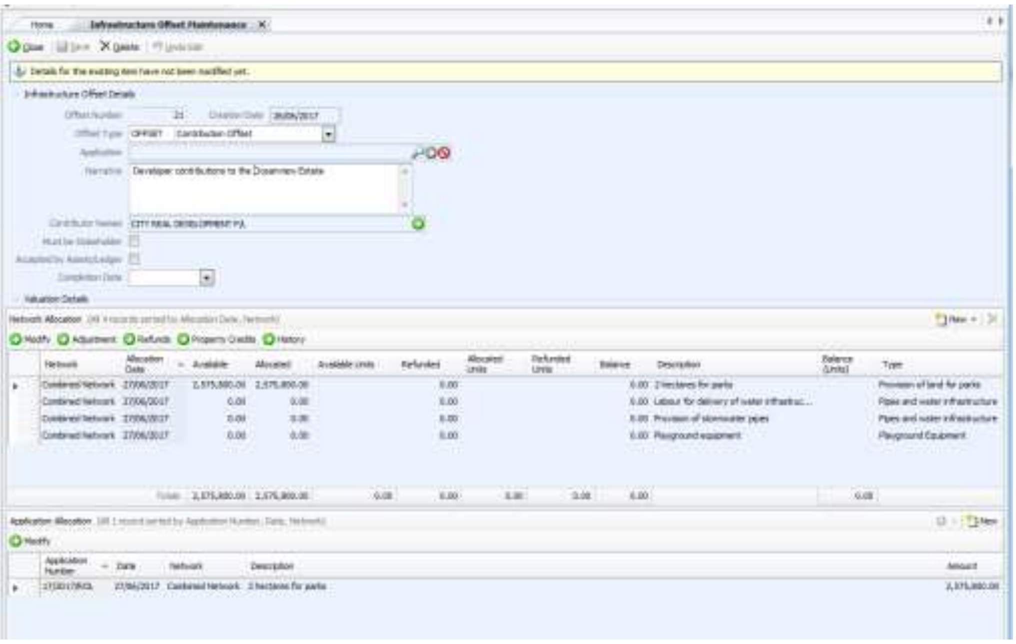
The New Property Credit Maintenance form will be displayed.



User must first select the Property to which the Property Credit will be assigned.
Fill in the remaining fields.



Press Save.



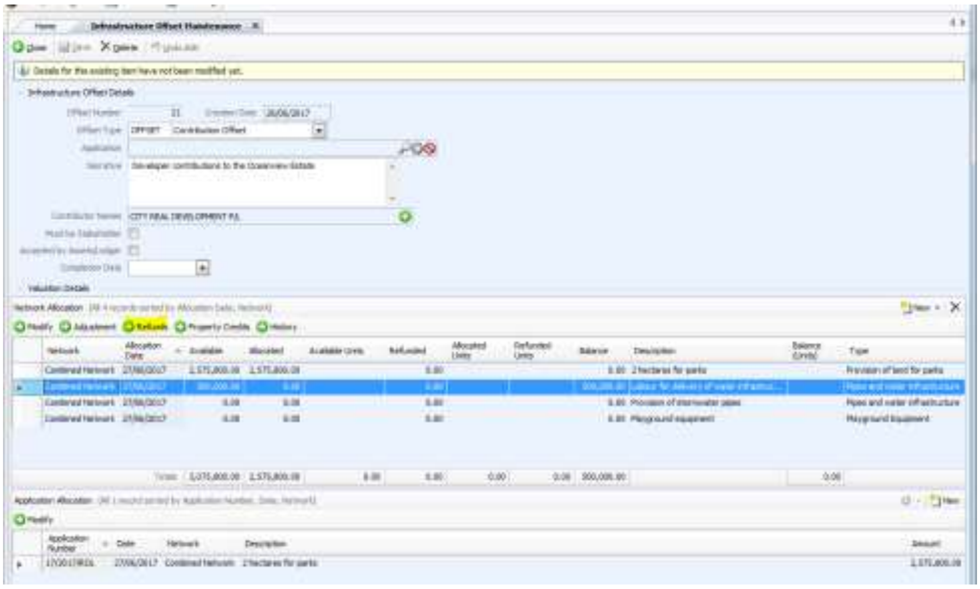
You can see now that the Allocated column now reflects the $2,575,800 that has been transferred to Property Credits.

History of the transfer is available via the History Button.

Offset Refunds

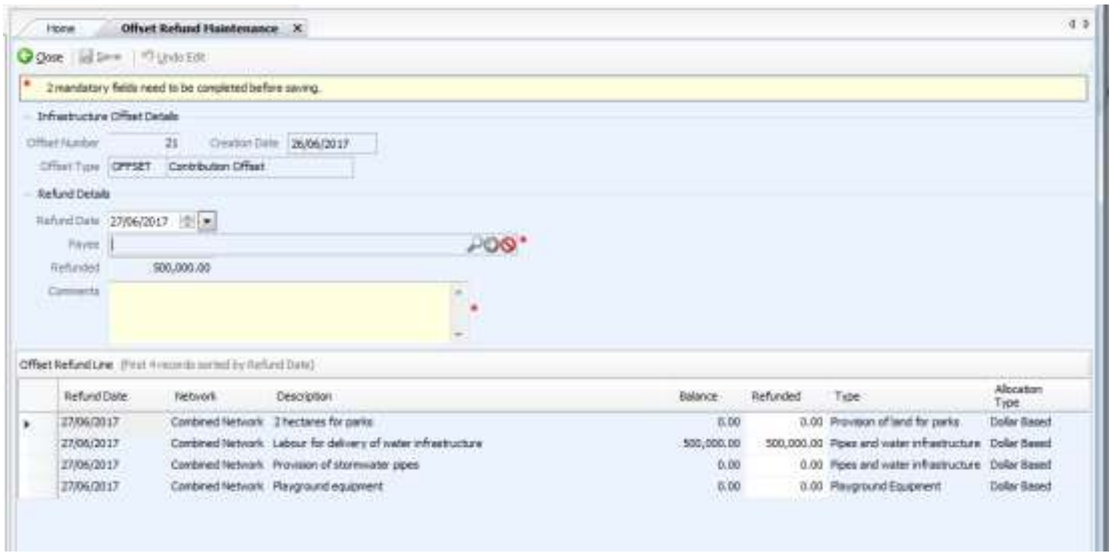
The ability to ‘refund’ an Offset has been provided.

Multiple refunds may be performed.



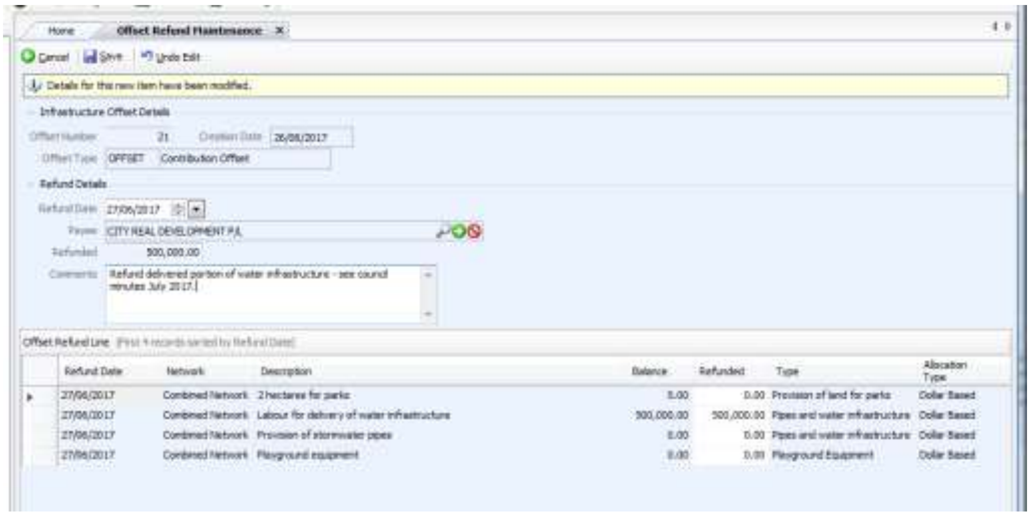
To Refund an Offset the user presses the “Refund” Button and the Offset Refunds Maintenance form is displayed. The Balance of the Offset must be greater than zero.

If previous refunds had been made against this Offset record they would be listed here.
To create a New Refund, click on the New Button.

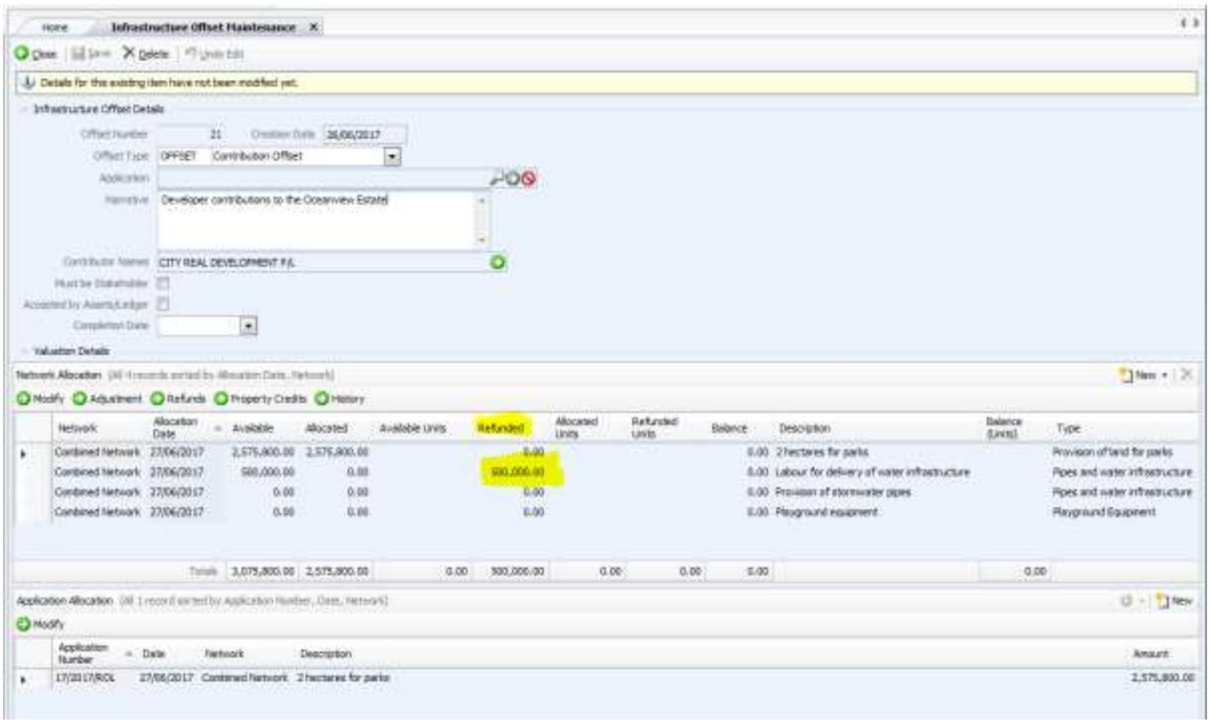


The user must select the “Payee” for the Refund.
Comments are mandatory.

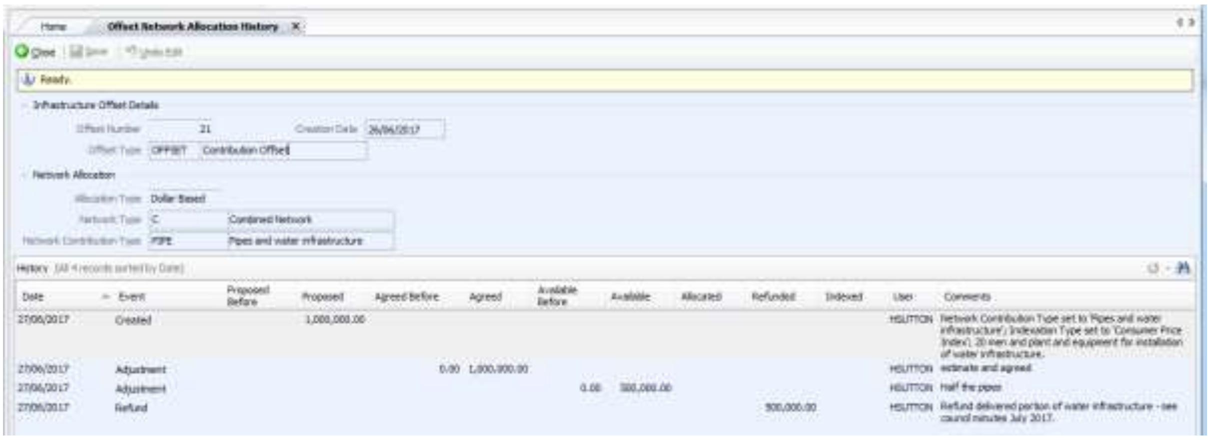
The amount to be refunded cannot be more than the “Balance” of the Offset.



On return to the main Offset Maintenance form the refunded amount is now shown against the appropriate networks.



The History will show the creation of the Refund record.

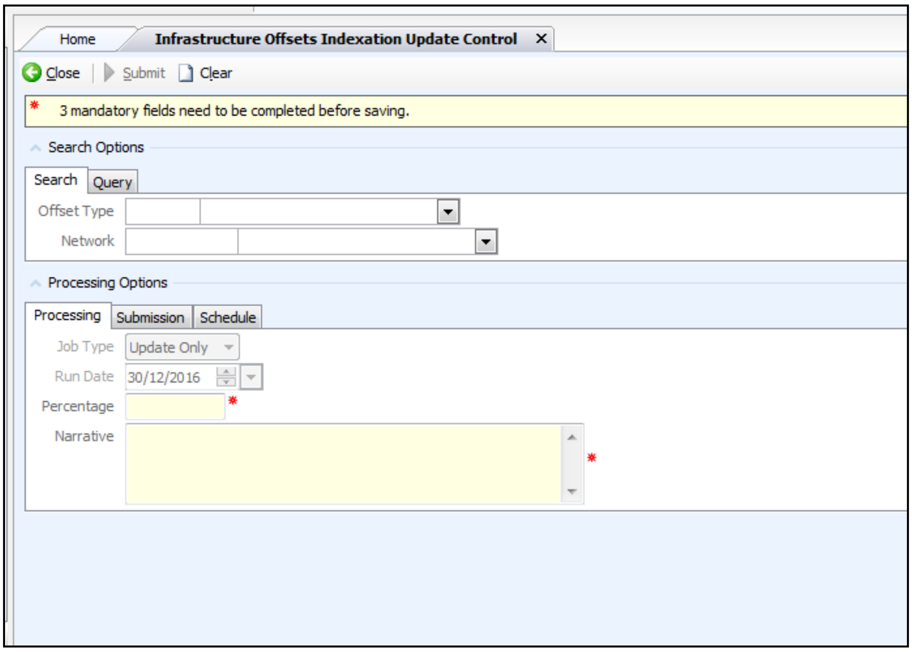


Offset Indexation Update

Please Note – This function is being re-coded.

This option is accessed via Applications >> Development Contributions >> Infrastructure Offsets Indexation Update.

Indexation may be run on a periodic basis (e.g. quarterly).



Offset Type: If the user wishes to restrict the application of Indexation to a specific type of Offset record then a selection is made via the drop down. If Indexation is to apply across all Offset Types, then no selection would be made.

Network: If the user wishes to restrict the application of Indexation to a specific Network then a selection is made via the drop down. If Indexation is to apply across all Offset Types, then no selection would be made.

The Job Type and Run Date may not be changed.

Percentage: The user will enter the appropriate percentage that the Offset is to be increased/decreased by. Negative numbers are allowed.

The Narrative is mandatory. It is recommended that this should be entered as a meaningful description of the job.

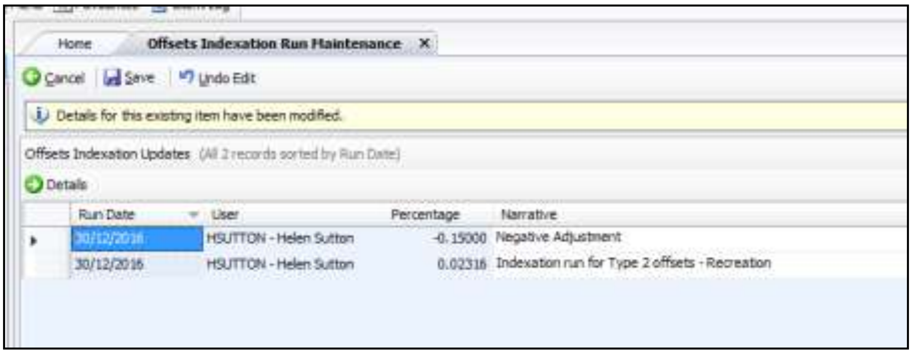
The Indexation is calculated using the “Available” amount on the Offset record.
The index amount calculated is written to a History record.

Offset Indexation Maintenance

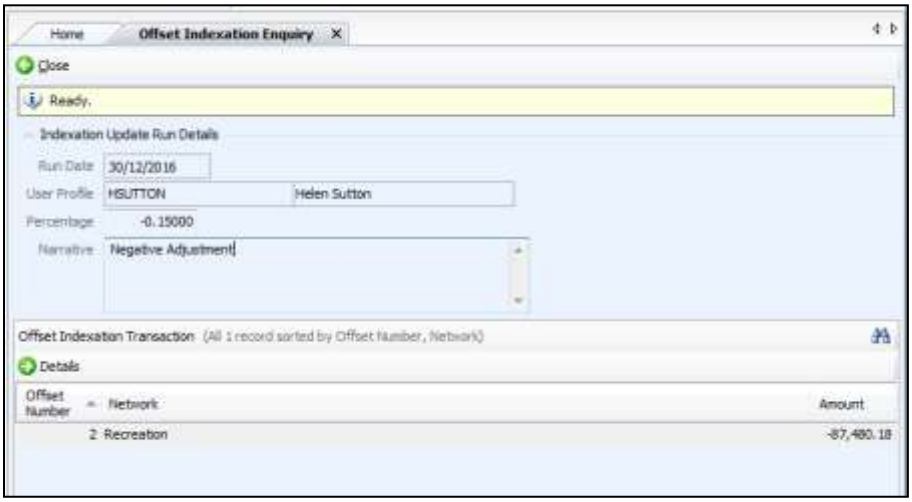
This option is accessed via Applications >> Development Contributions >> Infrastructure Offsets Indexation Maintenance.

This option will display all previous Indexation runs and allow the user to ‘drill out’ to individual records as required.

The Narrative field is available for adjustment; all other fields are not maintainable.



Clicking on the Details Button  will present a list of all Offset Records that were updated for the run.



From this form the user may press the Details Button again and drill out to individual Offset Records.

Word Processing

New Document Extracts have been added to the Applications Module.
Header File Maintenance must be performed for the Applications Module in order to create the new header files for the new extracts.

Contribution Fee Calculation Extract

Extract List Type – FCHARGES - Contribution Fee Charges
This extract analyses the first transaction against a Contribution Fee and extracts the calculation details.
The following fields are available:

Fee Code	«Fee_Code»
Fee Description	«Fee_Description»
Regime Code	«Regime_Code»
Regime Description	«Regime_Description»
Network Code	«Network_Code»
Network Description	«Network_Description»
Plan Number	«Plan_Number»
Major Category Code	«Maj_Cat_Code»
Major Category Description	«Maj_Cat_Description»
Minor Category Code	«Min_Cat_Code»
Minor Category Description	«Min_Cat_Description»
Dimension Type Code	«Dim_Type_Code»
Dimension Type Description	«Dim_Type_Description»
Dimension Value	«Dimension»

Rate	«Rate»
Fee Amount	«Fee_Amount»

Extract List Type – IOFFSETS – Infrastructure Offsets
This extract provides 'header' details of the linked Offset record.
The following fields are available:

Offset Number	«Offset_Number»
Offset Type	«Offset_Type»
Offset Description	«Offset_Description»
Offset Date	«Offset_Date»
Offset Completed Date	«Offset_Completed_Date»
Offset Contributor	«Offset_Contributor»
Offset Valuation Date	«Offset_Valuation_Date»
Offset Valuation Value	«Offset_Valuation_Value»
Offset Valuer	«Offset_Valuer»
Offset Comments	«Offset_Comments»
Associated Extract IONETWALLOC	**«Offset_Network_Allocation»**

Extract List Type – IONETWALLOC – Infrastructure Offset Network Allocation
This extract provides the details of the Offset's Network allocations and Application allocations.
The following fields are available:

Network code	«Network_Code»
Network description	«Network_Description»
Network allocation description	«Network_Allocation_Descr»
Network allocation date	«Network_Alloc_Date»
Network allocation proposed	«Network_Alloc_Proposed»
Network allocation estimate	«Network_Alloc_Estimate»
Network allocation agreed	«Network_Alloc_Agreed»
Network allocation available	«Network_Alloc_Available»
Network allocation allocated	«Network_Alloc_Allocated»
Network allocation refunded	«Network_Alloc_Refunded»
Network allocation indexed	«Network_Alloc_Indexed»
Network allocation balance	«Network_Alloc_Balance»
Network allocation comment	«Network_Alloc_Comment»
Application allocation date	«Application_Alloc_Date»
Application allocation amount	«Application_Alloc_Amount»
Application allocation comment	«Application_Alloc_Comment»

Document Management

Enhancements

PaperClip Attachments

InforXtreme Incident:	DRN: 30006	Fix:
THICK CLIENT;	KB:	

ATTACHMENT LINKS BULK IMPORT

An enhancement has been made to the Attachment Links Bulk Import process to trigger GENCON document management integration if required.

ePathway General Enquiry

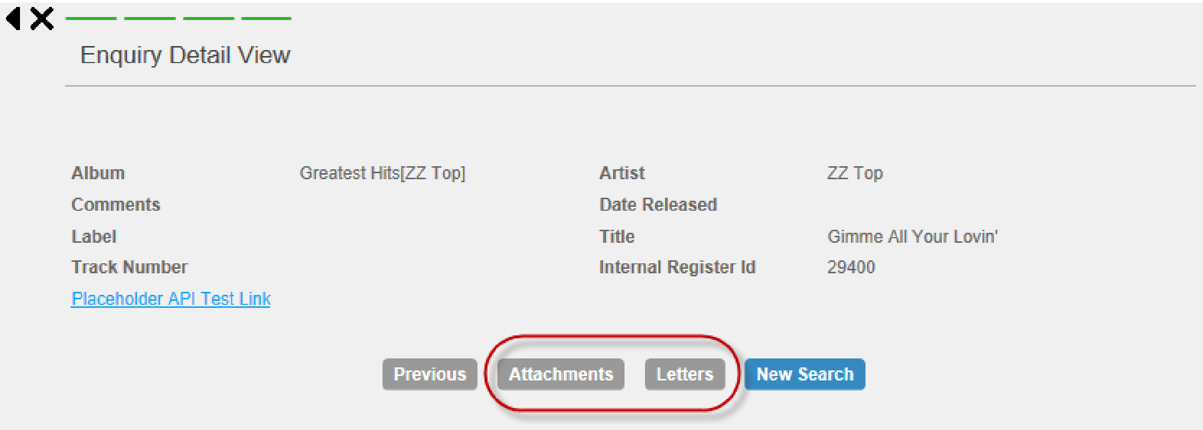
Enhancements

ePathway General Enquiry

InforXtreme Incident: NESA 9922130;	DRN: 29963	Fix:
SMART AND THICK CLIENT;	KB: 1851299;	

ATTACHMENTS AND DOCUMENTS/LETTERS STANDARDISED

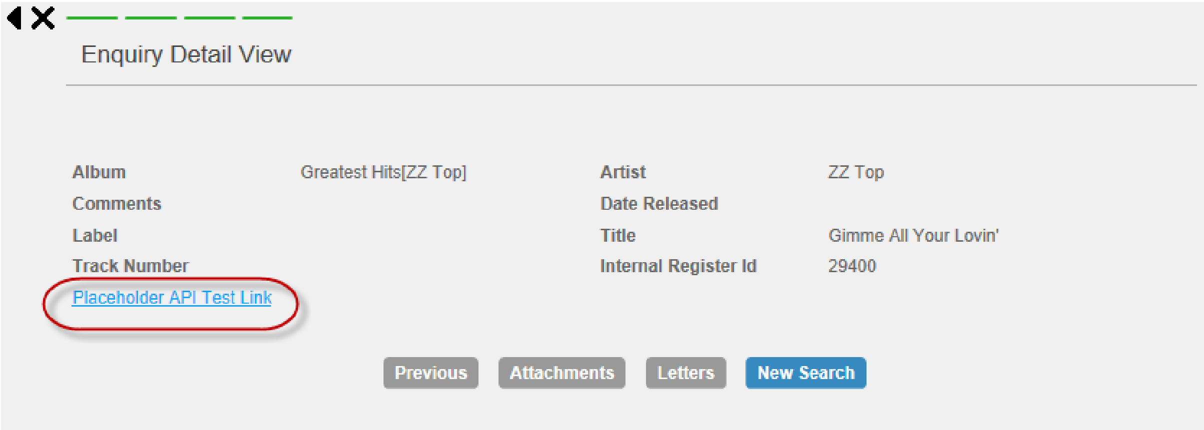
The ePathway Registers General Enquiry has had changes made to allow parameter based controls to be used to allow access to Attachments and Documents/Letters as per other ePathway General Enquiry modules. This change will also ensure documents stored in EDMS are accessible using the newer method of exposing Attachments and Documents/Letters as outlined later in this document.



Note: The pre-existing method of exposing Attachments and Documents by adding the control group fields of the same name to the ePathway Register General Enquiry Page Layout still exists and is unchanged. This means it does not recognise the new parameters and it does not attempt to access documents from EDMS. Sites using the pre-existing method are advised to use the new method outlined in this document if they wish to have more control and EDMS accessibility.

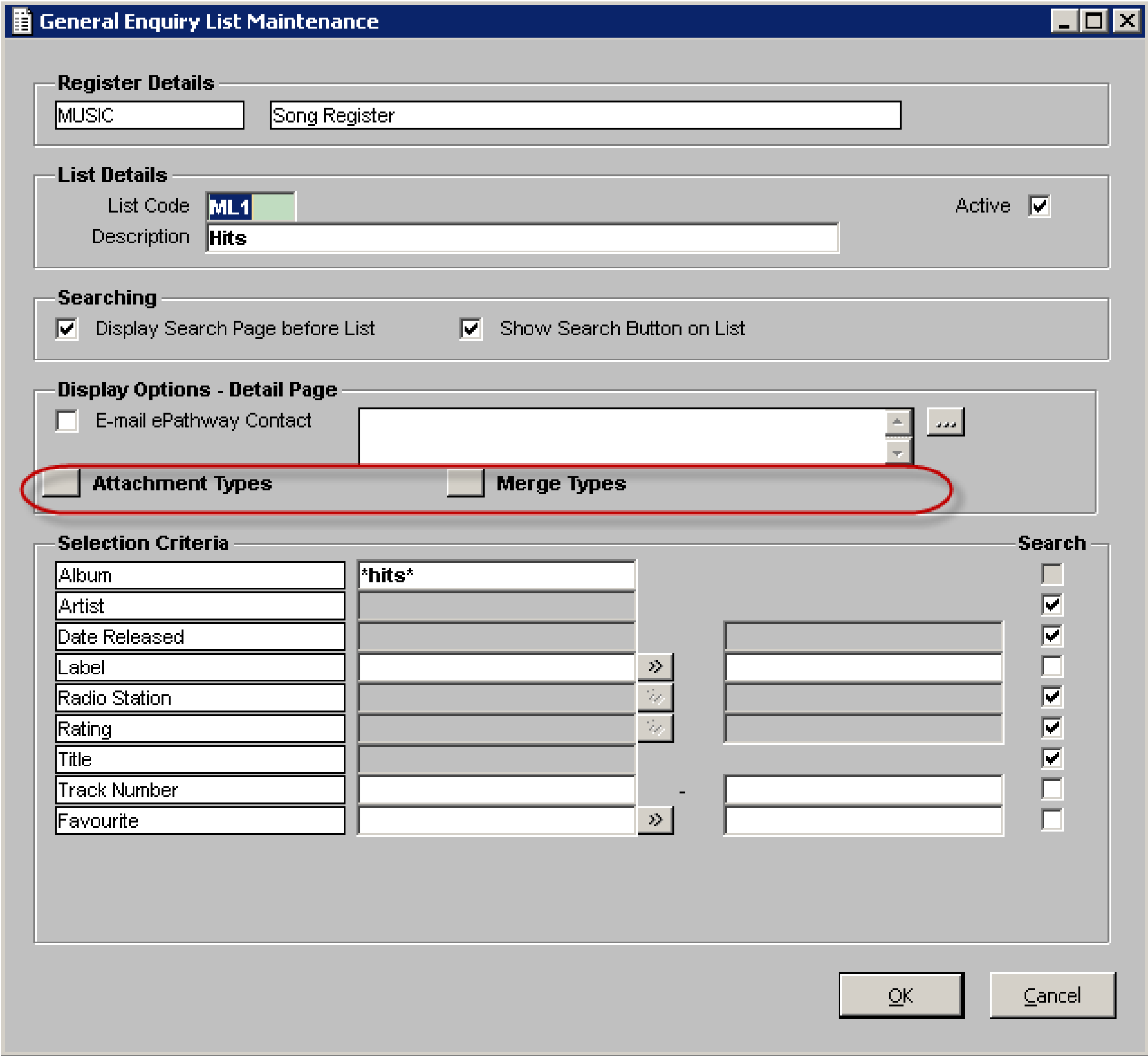
As part of standardising Registers, the ePathway Applications and Licensing General Enquiries have also been enhanced to allow Documents/Letters to be exposed on the general enquiry details form to complement the existing method of exposing them via Applications/Licensing Responses forms.

Lastly, a new Internal Register Id field has been made available for ePathway Registers Enquiry to allow sites to create their own placeholders using the new field as a token. This, for example, will allow tailored URLs to access EDMS APIs. See the example definition later in this document.

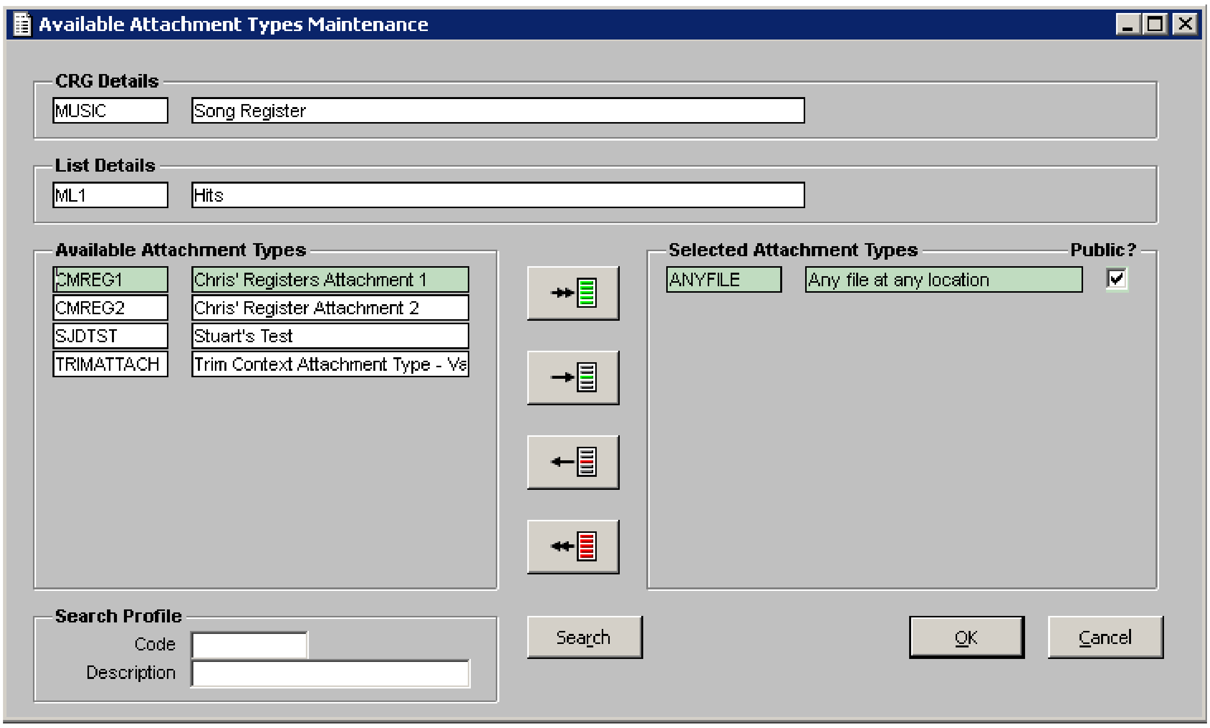


EPATHWAY REGISTERS GENERAL ENQUIRY PARAMETER CHANGES

The Registers General Enquiry List Maintenance form has been modified to allow access to Attachment Type and Merge Type selection forms to allow control of which attachments and documents to expose.

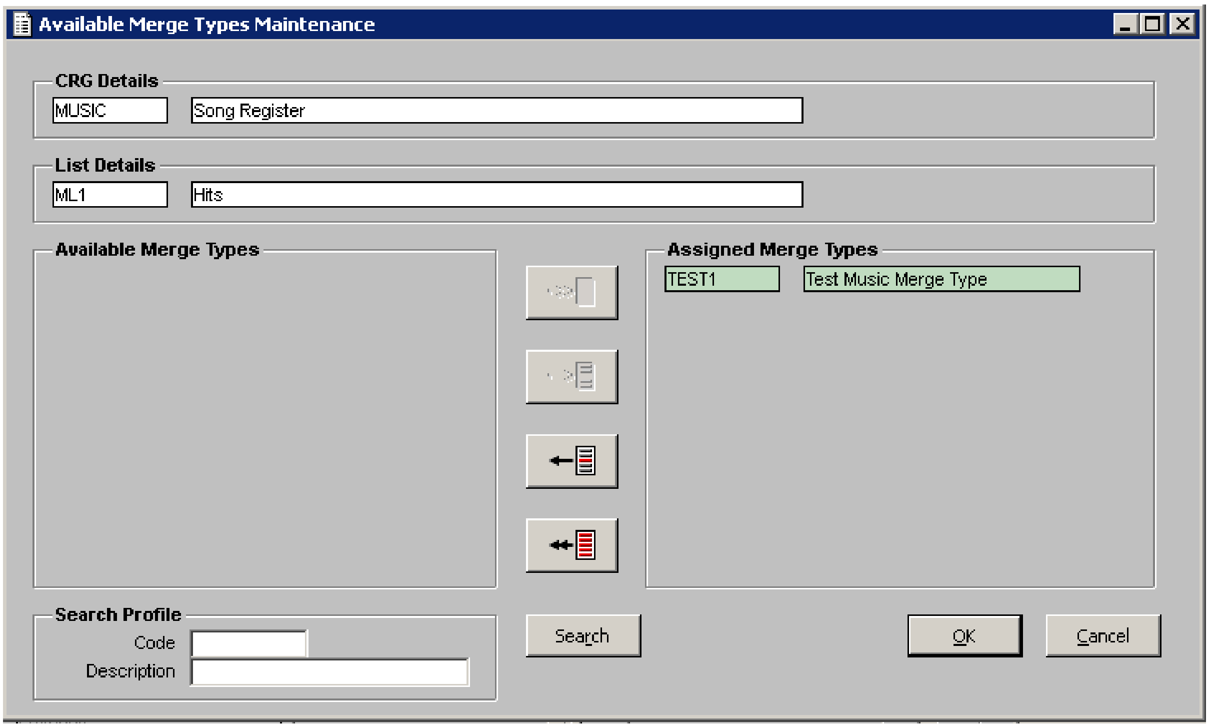


System Administration >> ePathway >> General Enquiry Parameters >> Register Enquiry Parameters >> Enquiry List Maintenance



The Attachment Type selection is as per existing enquiry modules. That is:

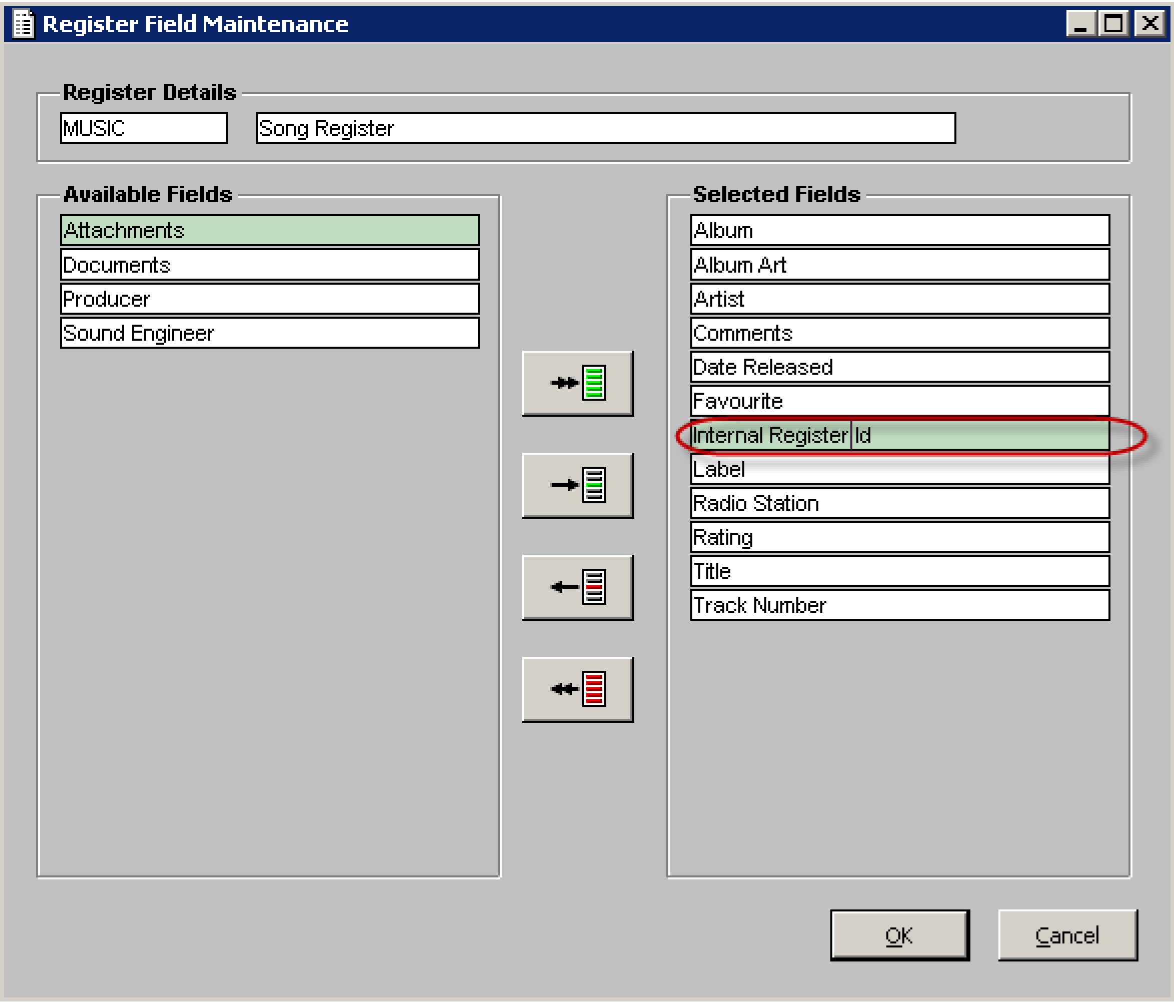
- Only selected Attachment Types will be exposed via ePathway
- Only those marked as Public will be visible to the public (i.e. Those not logged in as a registered user).



The Merge Type selection is as per existing enquiry modules. That is:

- Only selected Merge Types will be exposed via ePathway
- Only documents that have been issued and were addressed to the registered user will be visible to that user.

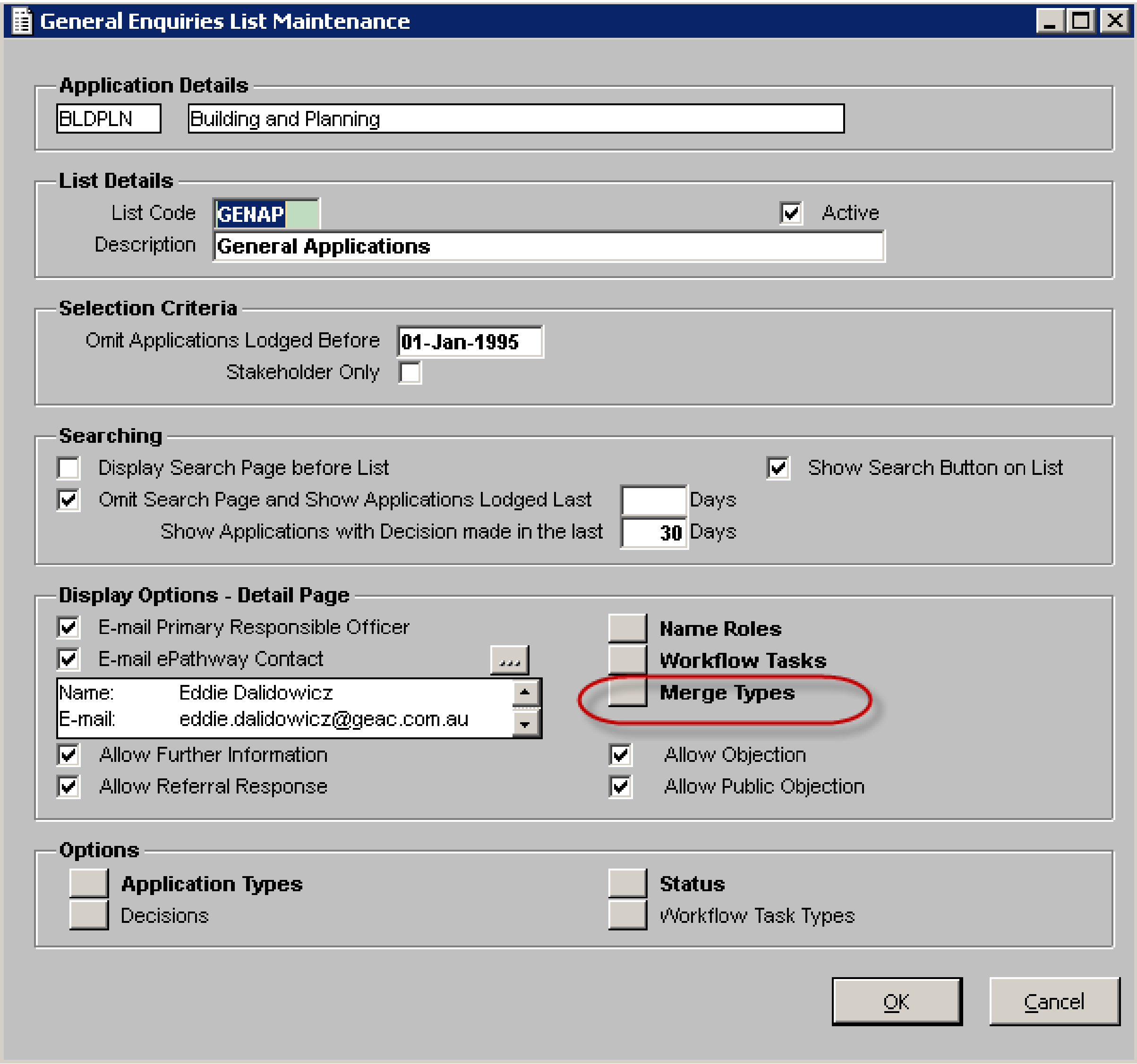
The Register Maintenance form now has the Internal Register Id field available for selection as shown below. Note also that the Attachments and Documents fields are no longer amongst the selected fields in this example as once the previous parameters have been setup, both will be exposed via the buttons at the base of the enquiry form as shown later in this document.



System Administration >> ePathway >> General Enquiry Parameters >> Register Enquiry Parameters >> Register Maintenance

EPATHWAY APPLICATIONS/LICENSING GENERAL ENQUIRY PARAMETER CHANGES

As per the changes for Registers, the Applications and Licensing Enquiry List form now allows selection of Merge Types.

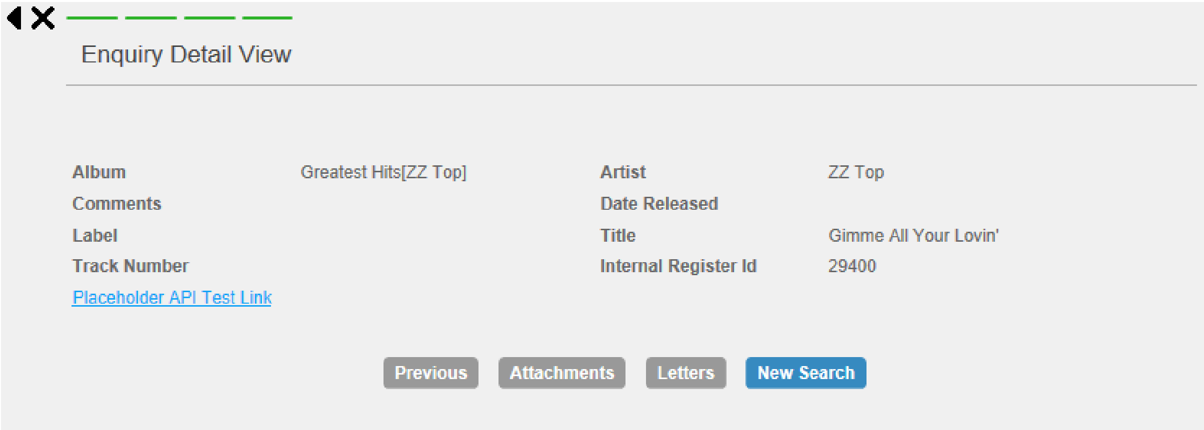


System Administration >> ePathway >> General Enquiry Parameters >> Applications Enquiry Parameters >> Application Enquiry List Parameters

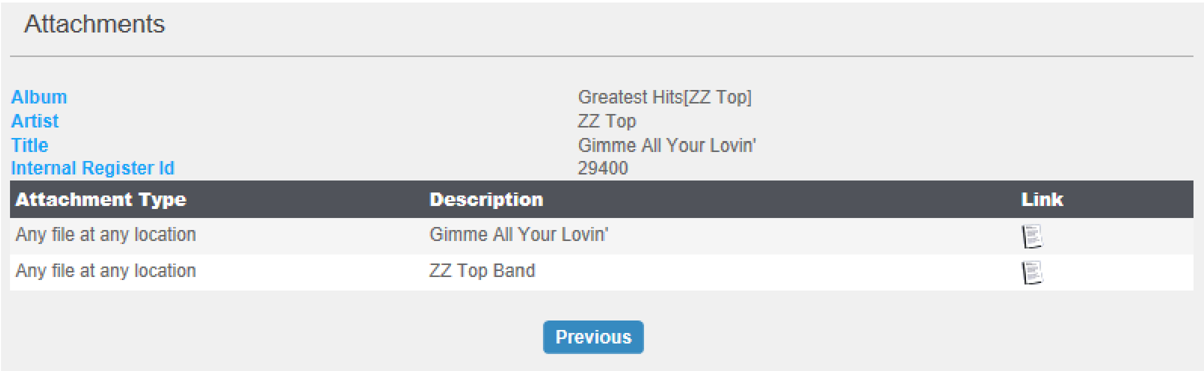
Note: No change has been made to the Attachment Type selection. The Attachment Type selection is setup via Application or Licensing Enquiry Stakeholder and Response Parameters >> Attach Types and is shared between ePathway Application or License General Enquiries and their Responses.

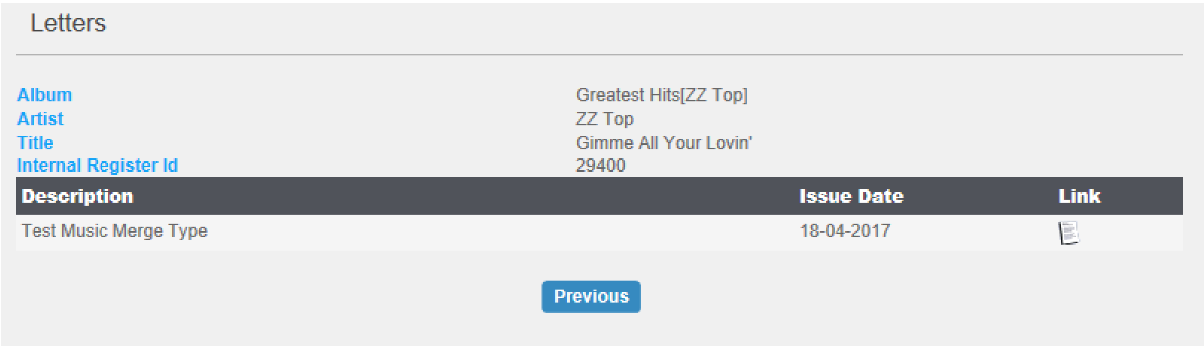
EPATHWAY REGISTERS GENERAL ENQUIRY DETAIL FORM

Once the parameters above have been established, the ePathway Registers General Enquiry form will display the Attachments and/or Letters buttons if there are documents available for the Register that the user has permission to view.

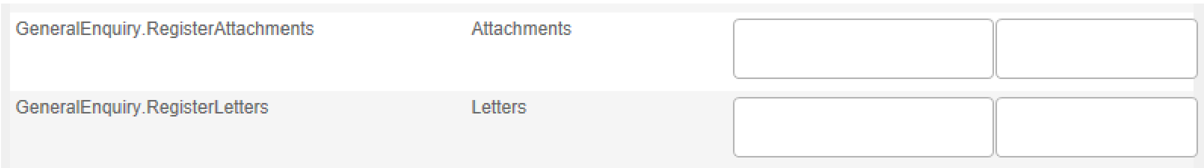


As per other enquiry modules, these buttons will then present sub-forms with the details of the Attachments or Letters.





Also, be aware that field labels and titles are the defaults in the above examples. As per other enquiry modules the title and button label text can be tailored via ePathway ADMIN >> Layout >> Text >> General Enquiry

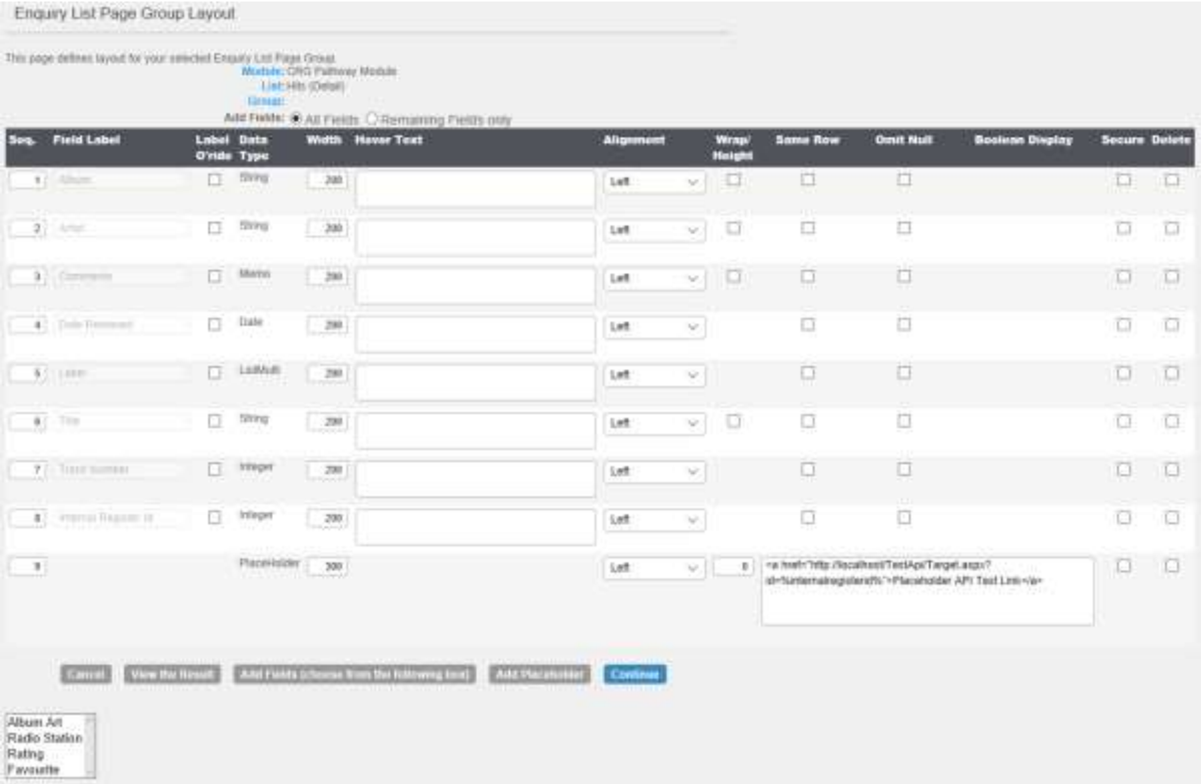


Other text items which may be relevant are the column headers for the display grids:

GeneralEnquiry.AttachmentType
GeneralEnquiry.AttachmentDescription
GeneralEnquiry.AttachmentLink
GeneralEnquiry.LetterDescription
GeneralEnquiry.LetterIssueDate

GeneralEnquiry.LetterLink

Below is a sample layout which is used for the Register for the examples above. This shows the inclusion of the new Internal Register Id and the Placeholder definition with the %internalregisterid% token.



ePathway ADMIN >> Layout >> Page Layout >> ePathway General Enquiry - Registers >> Detail

ePathway System

Enhancements

ePathway and CityWatch Payments

InforXtreme Incident: RAND 10484439;	DRN: 30262	Fix:
	KB:	

SECURITY UPGRADE ON SECUREPAY AND NABTRANSACT

SecurePay and NABTransact are changing their gateways to only accept TLS1.1 plus (as a security protocol) for integration to their payment gateway. ePathway and Smart Mobile required a minor change to accommodate this.

Infringements

Enhancements

External Receipt Import

InforXtreme Incident: COGC 10727907;	DRN: 30366	Fix: 03107026;
SMART AND THICK CLIENT;	KB:	

EXTERNAL RECEIPT IMPORT CONTROL

A correction has been made to the External Receipt Import when importing infringement payments. Previously with the 'Allow Under Payments' flag on the Infringement set OFF, any underpayments would result in the balance of the infringement being written off.

Now when an underpayment is processed and the 'Allow Under Payments' flag on the Infringement is set OFF, the External Receipt Validation Report will include the description 'This Offence has been UNDERPAID'. The underpayment will not be written off unless the 'Write-Off Balance' flag on the Infringement Type is set ON.

Inspections

Enhancements

External Web Services

InforXtreme Incident:	DRN: 30233	Fix:
SMART AND THICK CLIENT;	KB:	

READINSPECTION EXTERNAL WEB SERVICE NOW INCLUDES RESULT HISTORY

The ReadInspection External Web Service has been updated to include a historyResults element which will encompass the history of an Inspections result status, including the user who recorded the result and the date and time at which it was set.

Licensing

Enhancements

Licencing Parameters

InforXtreme Incident: CCC 7707046; BAYSIDE 10613718;	DRN: 29592	Fix: 03107000; 03107007; 03107010; 03107024;
SMART CLIENT;	KB:	

FEE REGIME MAINTENANCE

The ability to create fees under a regime has been added to the licencing module. As many regimes as necessary can be created and named accordingly.

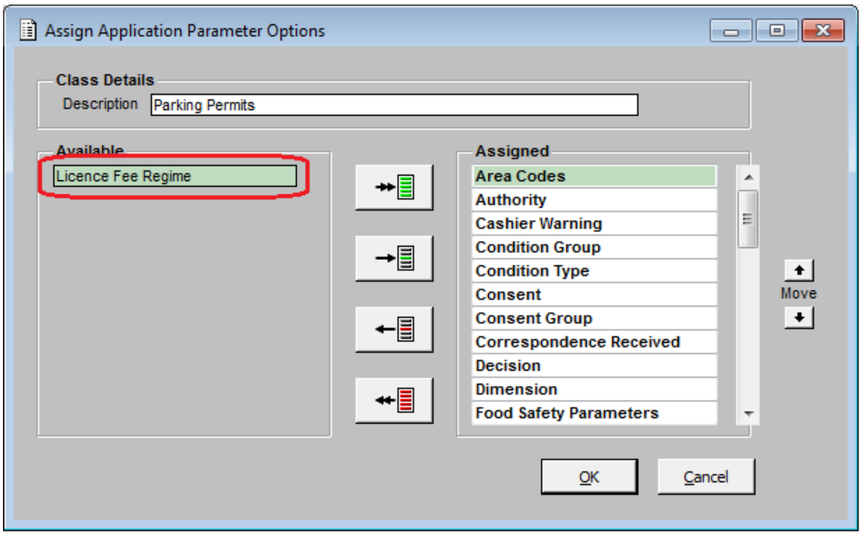
As fees must now be allocated to a regime, as part of the upgrade process each licensing class with fees present will have a default licence fee regime created and linked to the existing licensing fee records.

Classes created after the upgrade process will need to have a new fee regime created manually before fees can be defined.

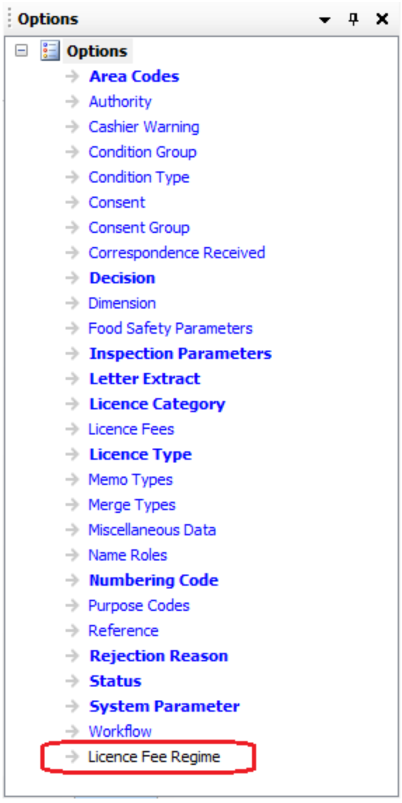
Fee Regime Parameters

A new option has been added to the Licensing Class Parameters form to allow the creation and maintenance of Licence Fee Regimes.

Before the fee regime parameters can be accessed they must be assigned to the appropriate responsibility group. From the Licensing Classes menu option assign the Licence Fee Regime option within the class and group parameters.

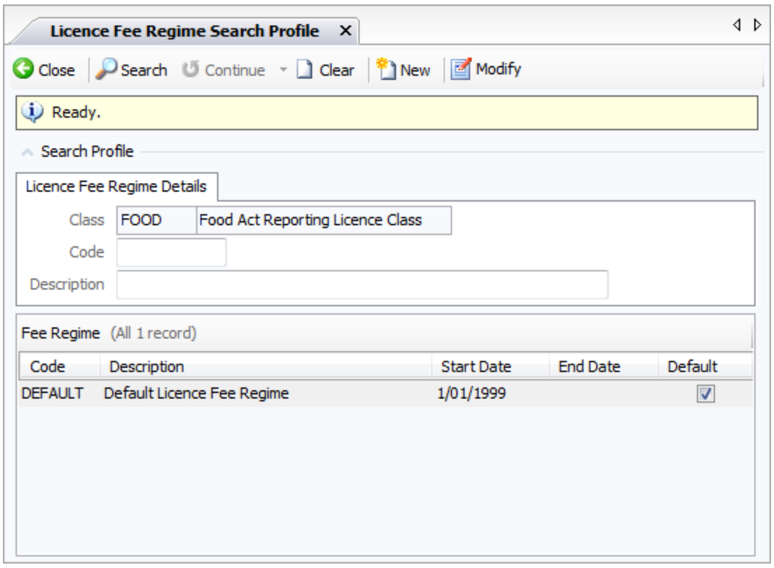


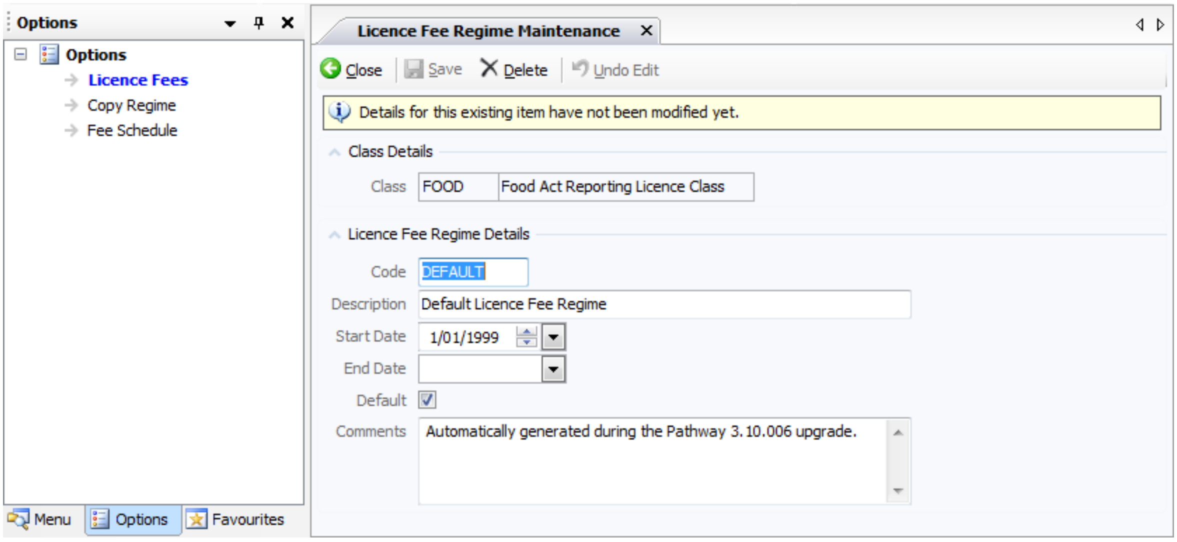
A new Licence Fee Regime option will then be available within the Smart Client version of Pathway.



The maintenance of Fee Regimes can only be done from the Smart Client. If a new class is created within the Thick Client version of Pathway a default fee regime will be created but additional regimes cannot be created unless using the Smart Client.

The forms below show an example of a default regime created during the upgrade process.





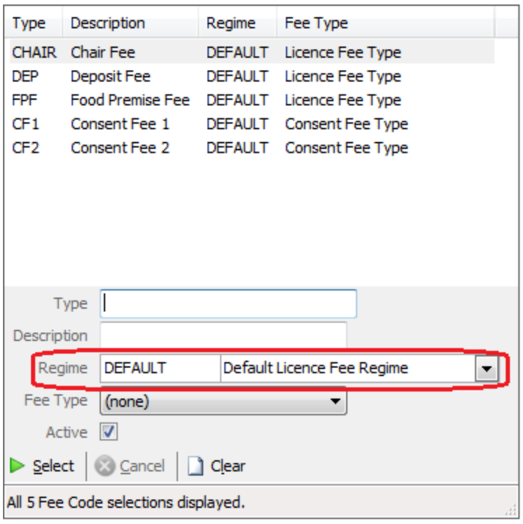
When creating a fee regime, the Code, Description and Start Date fields are mandatory.

Start and End Date

The start and end date is used when fees have been assigned to load automatically, for example during lodgement. The fee will only be added if the system date is equal to or greater than the start date and less than or equal to the end date (if provided). If the system date is before the start date of the regime or after the end date of the regime the fee will not be added. The fee can however continue to be added manually from the fee maintenance form.

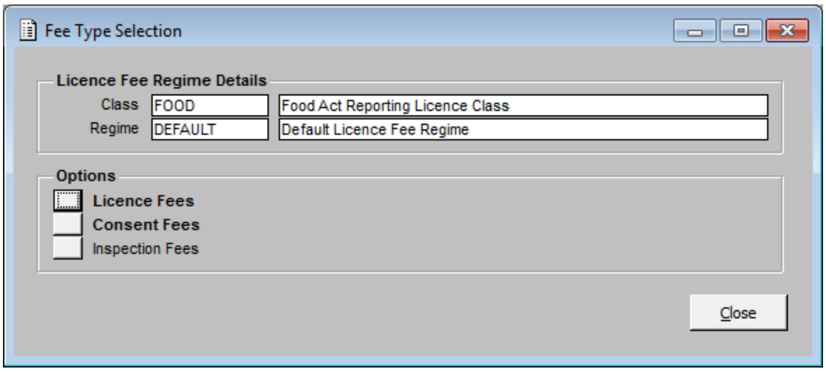
Default

The default flag allows the main fee regime to be specified. If a default regime has been specified, the fees displayed when manually adding a fee will initially be limited to fees within the default regime. Fees for other regimes can be selected by clearing the regime filter or by selecting a different regime.

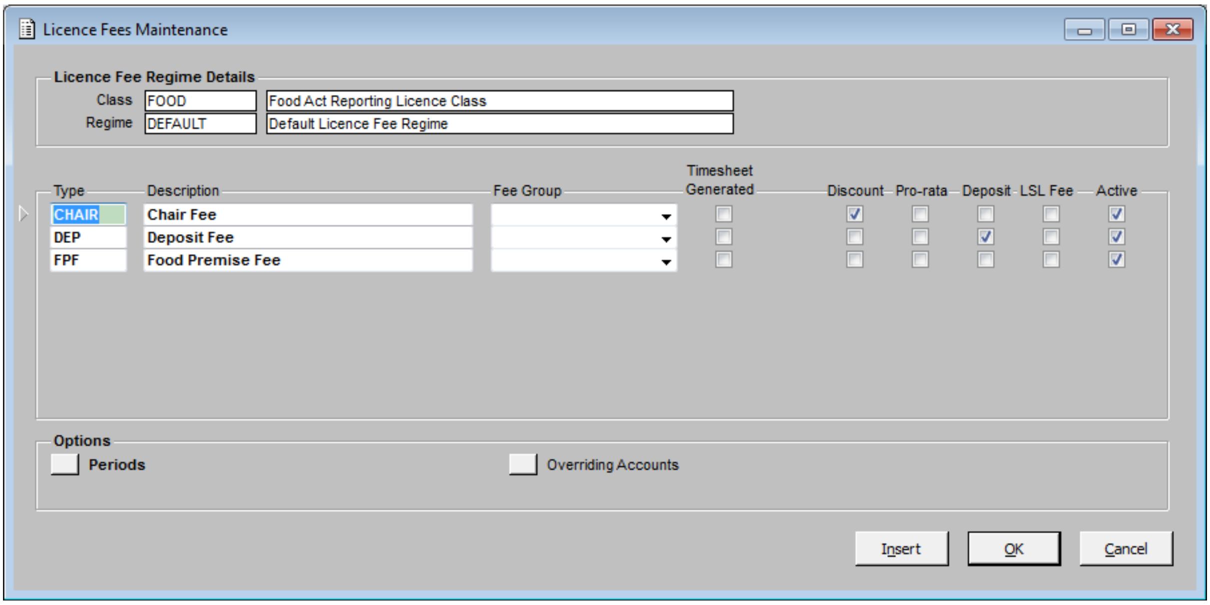


Licence Fee Option

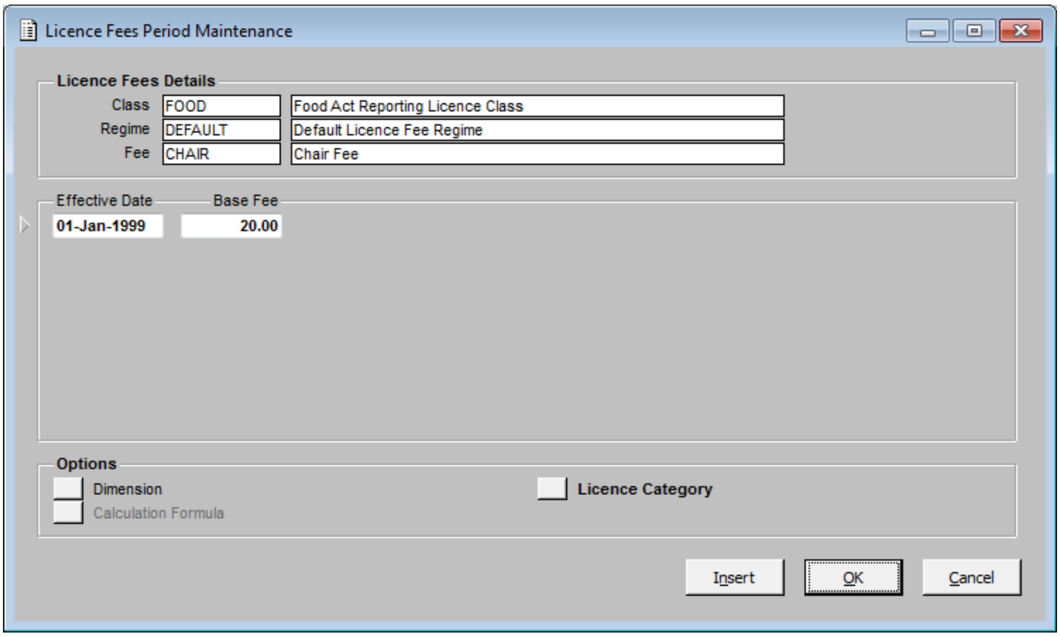
The Licence Fee option allows the fee parameters for the current licence fee regime to be maintained.



After selecting one of the fee type options the new Licence Fee Maintenance form will be displayed.



This form is like the previous Licence Fee Maintenance form except that the fields Base Fee and Minimum Fee and the options Dimensions, Calculation Formula and Licence Category have been moved to a new Periods option. Selecting the Periods option will display the Fee Period Maintenance form.

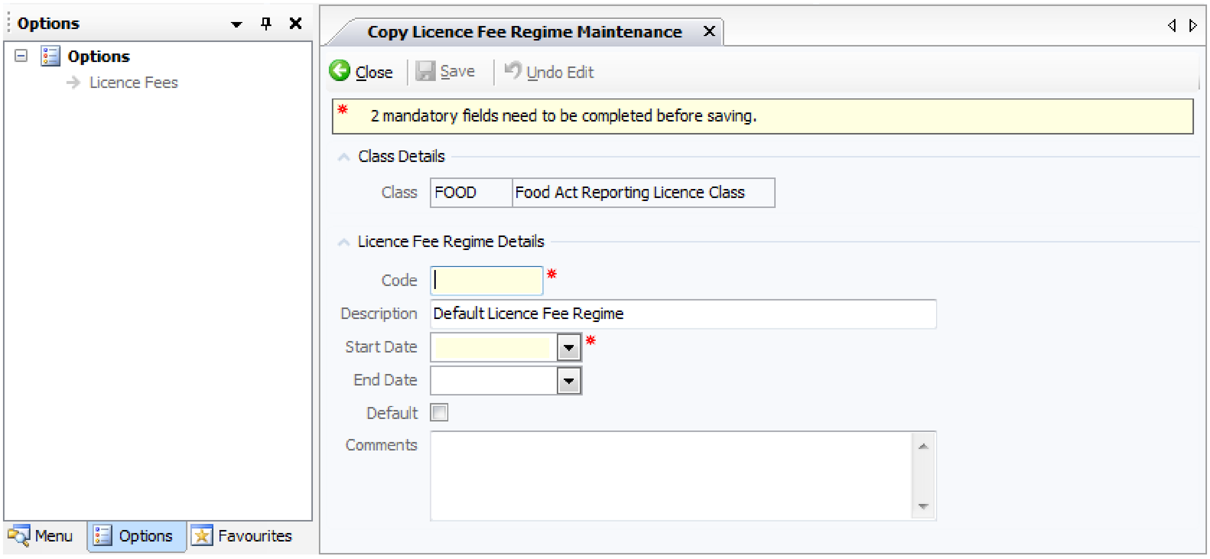


From the Fee Period Maintenance form the charges and rates for the fee can be specified to take effect on a particular date. New charge parameters can be entered with an effective date that is in the future and these charges will not be used until the system date is equal to the new effective date.

The Minimum Fee field is only available for fees with the Timesheet Generated flag turned on.

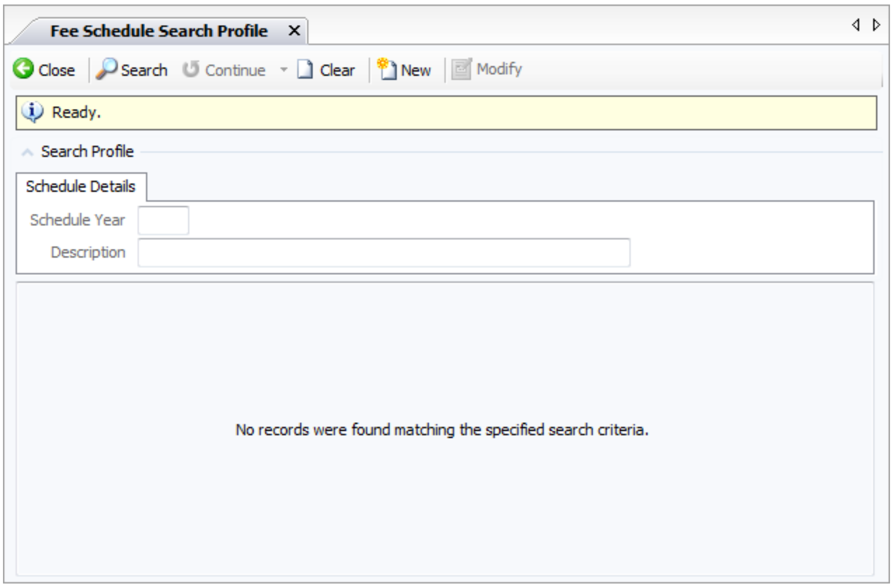
Copy Regime Option

The copy regime option can be used to create a copy of a regime. All active fees and the latest fee period for each fee will be copied to the new regime. After selecting the copy regime option a new form will be displayed allowing the details of the new regime to be entered.

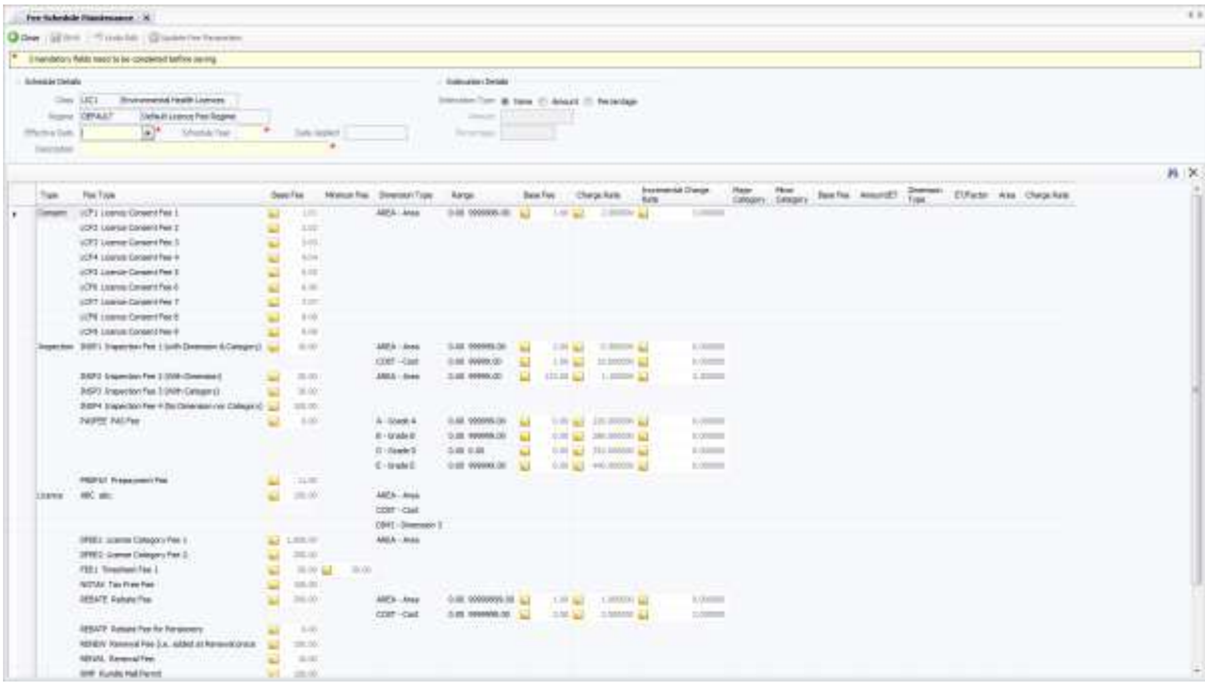


Fee Schedule Option

The fee schedule option allows the charges and rates for a regime to be displayed and maintained on a single form and then applied to the appropriate fees at a given effective date. Selecting the fee schedule option will display the Fee Schedule Search Profile form.



This form will display all the schedules that have previously been applied to the regime and any schedules that are currently being worked on. Pressing the new button will create a new schedule.



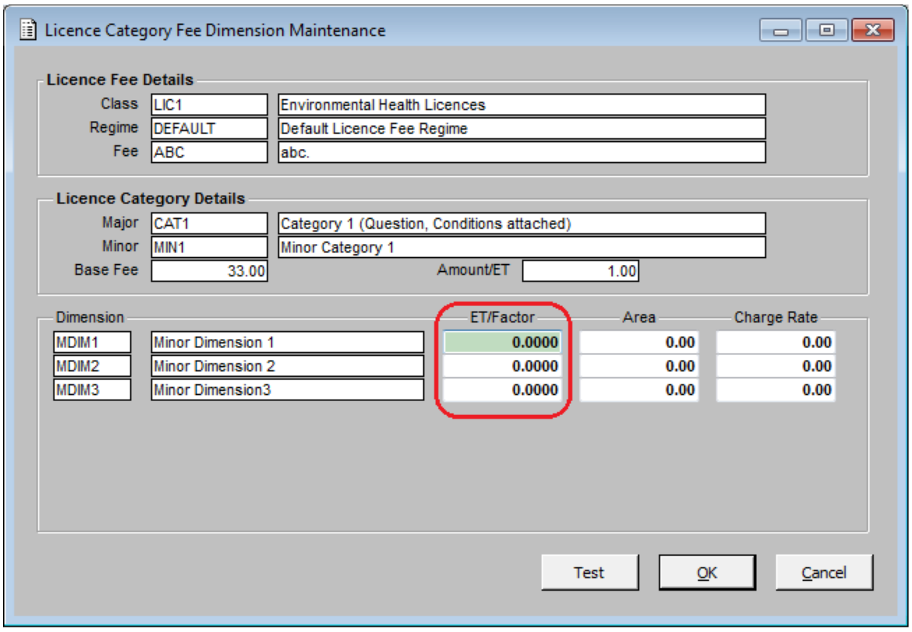
When a new schedule is created the fee schedule maintenance form will be displayed with all active fees for the regime and the charges and rates will be populated from the latest fee period for each of the fees. Only licence categories with the Include in Schedule flag will be included with the fee. If a fee is not required to be updated by the schedule the delete button on the schedule grid can be used to delete the fee from the schedule.

Each of the values can be changed manually or indexation can be applied by entering the indexation details.

Details of the schedule can be saved and maintained until you are happy with the new charges and rates. Once you are happy with the schedule the Update Fee Parameters button can be used to create new fee periods within each of the fee parameters for the new charges. When the schedule is updated to the parameters the date applied field will be populated on the schedule and no further changes to the schedule will be allowed.

Licence Category Fee Dimension Maintenance ET/Factor

The ET/Factor field on the Development Category Fee Dimension Maintenance form has been increased from 3 decimal places to 4 decimal places.



Property Administration

Enhancements

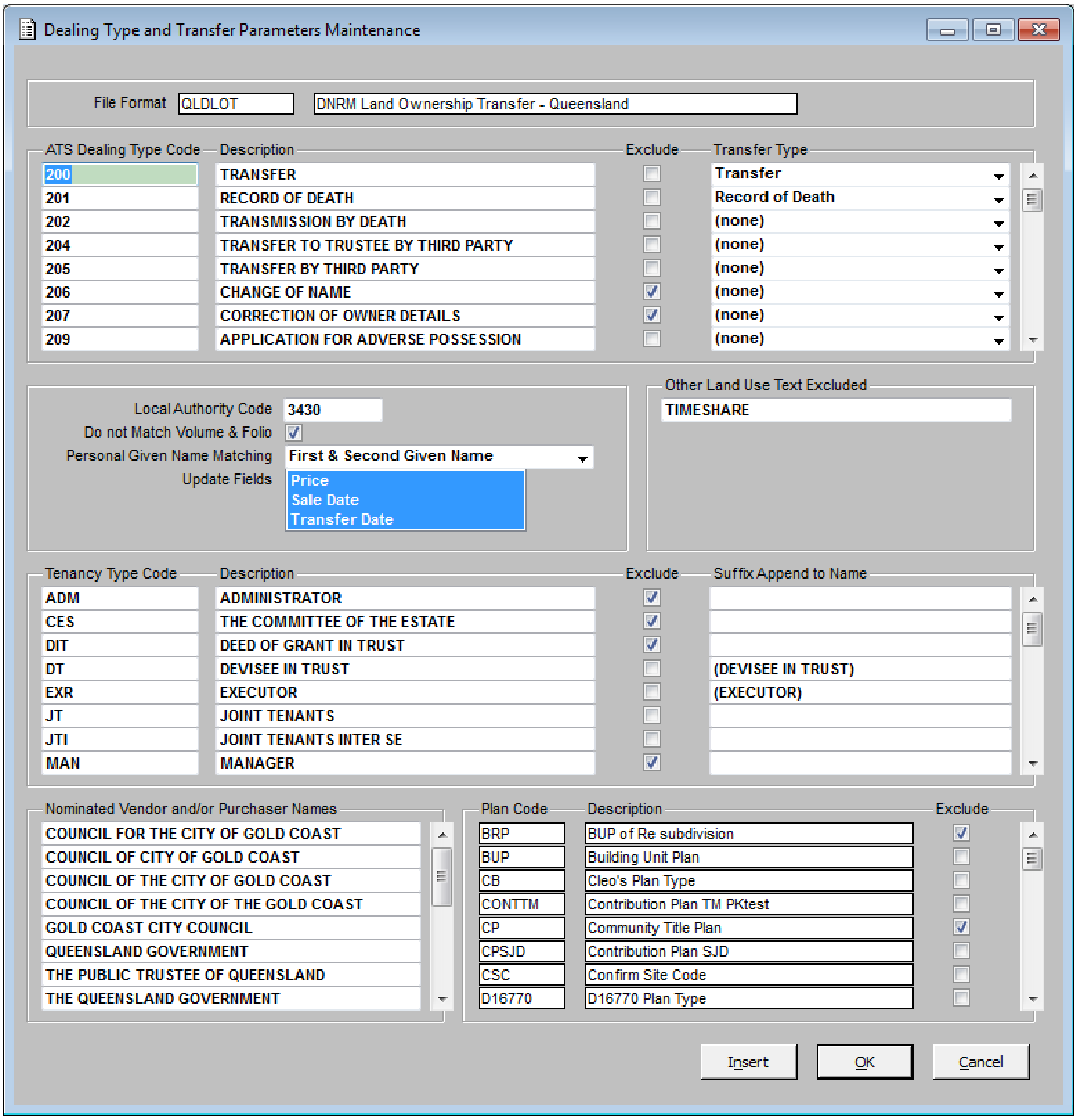
Transfer of Ownership Import

InforXtreme Incident:	DRN: 30134	Fix: 03107000;
SMART AND THICK CLIENT;	KB:	

TRANSFER OF OWNERSHIP IMPORT (QLD only)

Enhancements have been made to the Transfer of Ownership import function for Queensland sites.

PARAMETER MAINTENANCE



The Dealing Type and Transfer Parameters Maintenance form has been enhanced to cater for the following:

- Added a new "Local Authority Code" field. If field has a value, for example, 3430 for City of Gold Coast, the Transfer of Ownership Import will validate the DNRM file against the value.
- The ability to define "Other Land Use Text" records that are required to be excluded from normal transfer processing. For example, "TIMESHARE" arrangement transfer.
- The ability to define Tenancy Type Code and allow to nominate whether or not the Tenancy Type Code should be excluded from normal transfer processing. Additionally, for each Tenancy Type Code, Council can specify an optional suffix. If suffix is defined, then it will be appended to a Purchaser's Name on the External Transfer Maintenance screen, based on the Purchaser's Tenancy Type Code.
- The ability to define Nominated Vendor and/or Purchaser Names. If defined, external transfer validation process will check Vendor/Purchaser's Name to see whether or not the Vendor/Purchaser is a nominated Vendor/Purchaser Name. If yes, a validation error message will be issued to indicate this situation.
- The ability to nominate Plan Code to be excluded from normal transfer processing.

TRANSFER OF OWNERSHIP IMPORT CONTROL

File Name and Date

More validation rules have been added for file name and date.

Transfer of Ownership Import/Validation/Update Reports

Previously, the report records were ordered based on import sequence. Now it is ordered by message type, i.e. the report displays records imported with Error first, then records with warnings, then summary of the batch (total of records imported/errors/warnings/validated/updated, etc.).

PROCESS EXTERNAL TRANSFERS

External Transfer Batch Maintenance

A new field "File Date" has been added to show the date of an imported file.

External Transfer Maintenance

- Added new fields, including Vendor Tenancy Type, Purchaser Tenancy Type and Name Type.
- Extracted more data from the file, including Other Land Use Text, Trust Name, ACN, Contact Phone, Share Numerator, Share Denominator, etc.

Validation Rules

Added more validation rules based on the parameter settings.

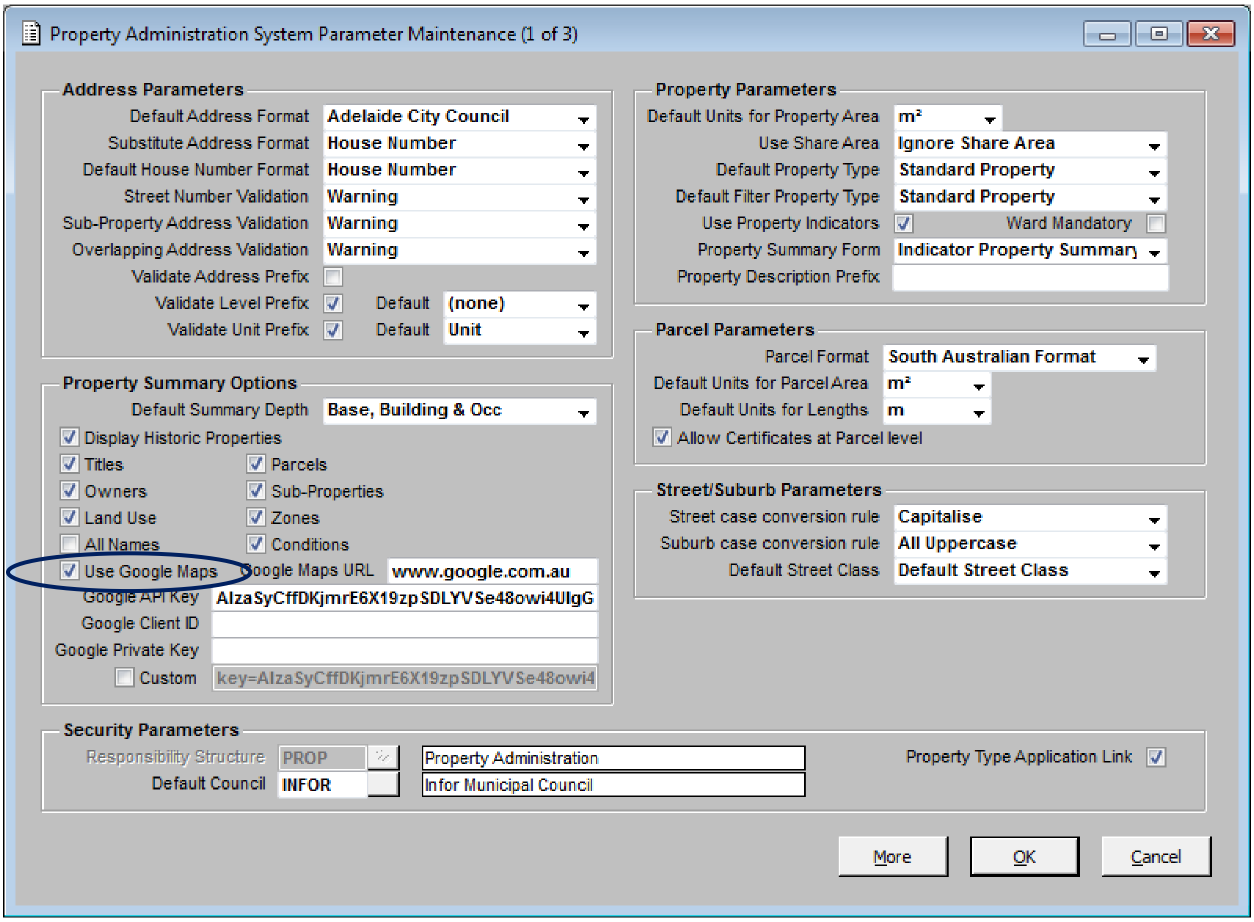
Property Search Profile

InforXtreme Incident: COGC 10421431;	DRN: 30195	Fix:
SMART CLIENT;	KB:	

PROPERTY SEARCH AND GOOGLE MAPS

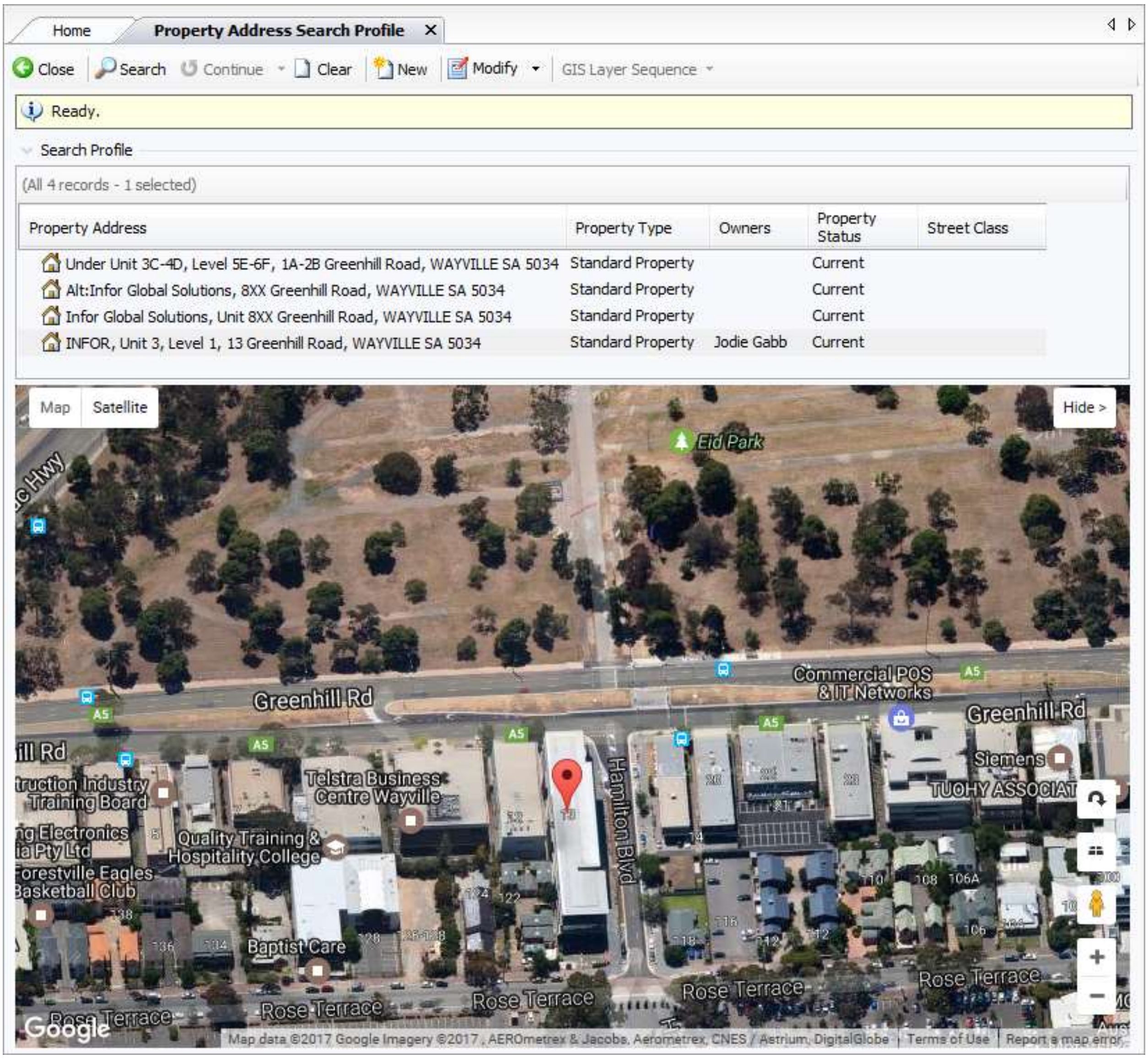
Changes have been made to the Google Maps interface on the Property Search Profile form.

The 'Use Google Maps' setting on the Property Administration System Parameter Maintenance (1 of 3) form indicates whether the Google Maps functionality is implemented.

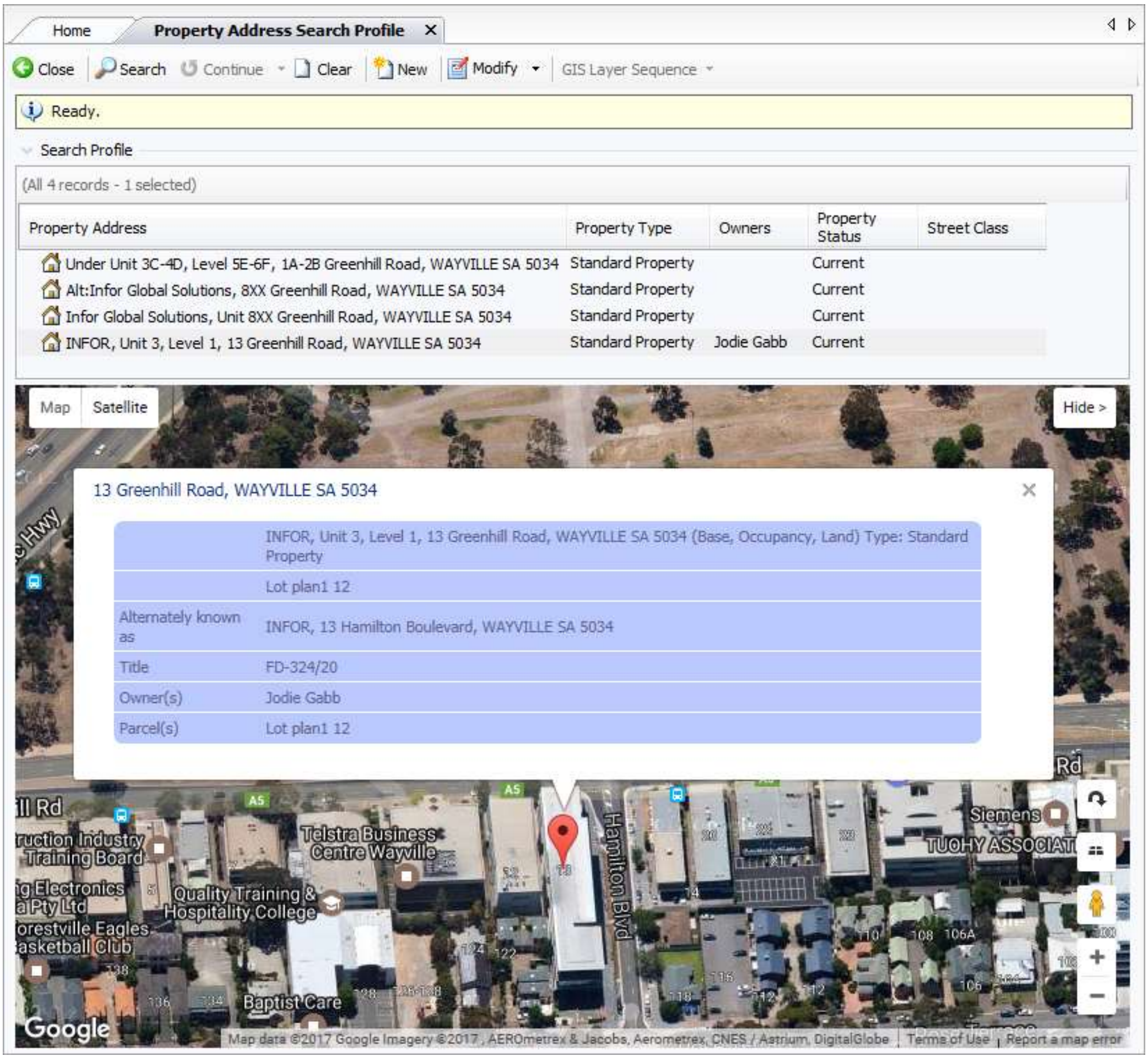


Property Search Profile

As an item within the search result is given focus the Google Maps pans to the appropriate location and displays a 'marker'.



Clicking the ‘marker’ will display the summary information for the search result item.



As a different item within the search result is given focus Google Maps will move the 'marker' to the appropriate location.

Prior to this modification if Google Maps could not determine the location of the newly selected result item the 'marker' for the previous item remained on the map and this could be misleading.

The Property Search Profile form has been modified to remove the 'marker' of the previous item when the location of the currently selected item cannot be resolved.

The Property Search Profile form uses the primary Property Address to determine a Google Maps location. The primary Property Address may contain other addressing items such as Property Name, House, Unit and Level information that is superfluous and can prevent Google Maps identifying the location.

The correlation between the primary Property Addresses and Google Maps locations is determined by the property address components and the formatting rule applied to construct the primary Property Addresses.

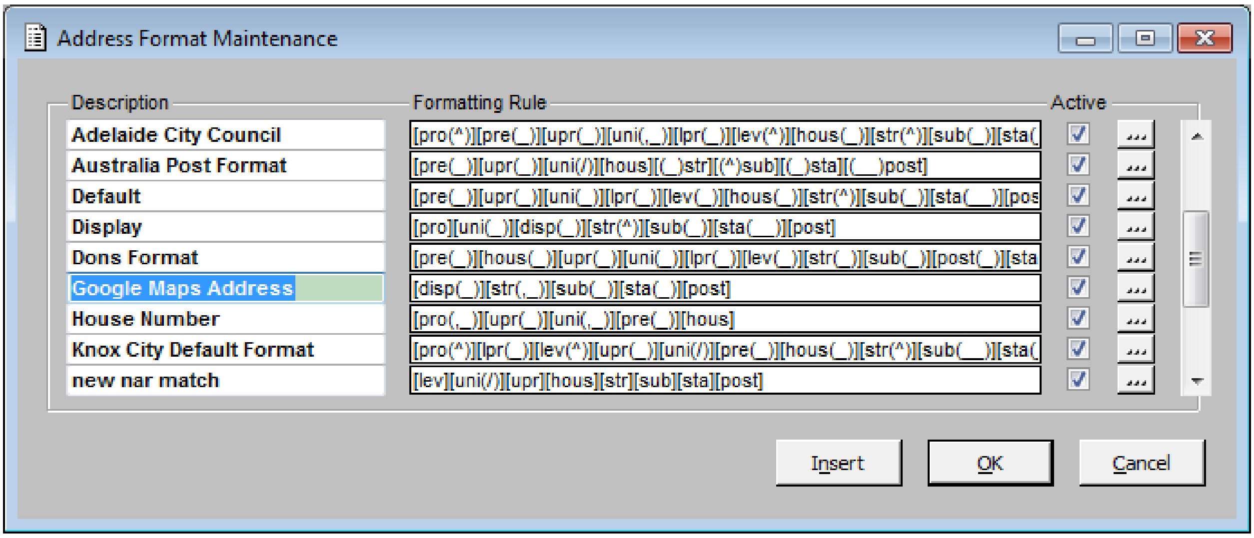
In some Council installations, the correlation between the primary Property Addresses and Google Maps locations is sufficient and therefore no adjustment needs to be performed as Google Maps usually resolves the location correctly.

In other Council installations with extensive use of Property Name, Unit and Level information within the primary Property Address the correlation is insufficient and therefore Google Maps often fails to locate the search result item.

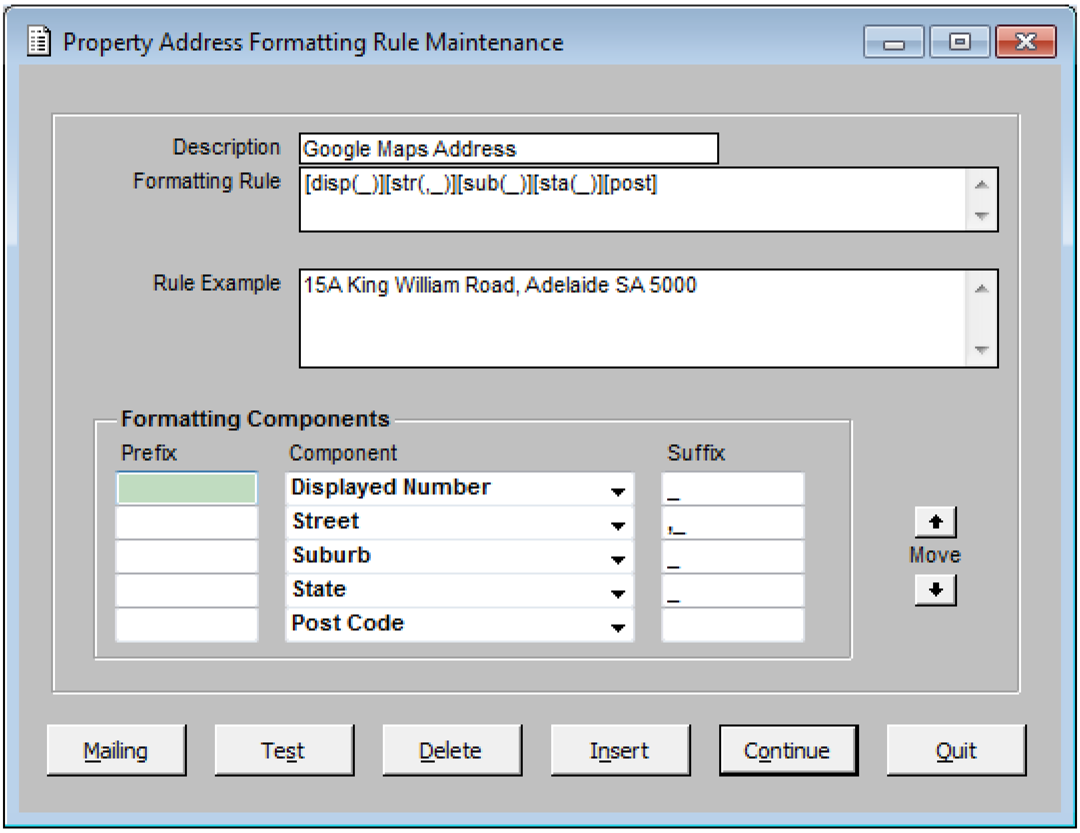
When the correlation between the primary Property Address and Google Maps location is insufficient an adjustment can be implemented by adding a new ‘Google Maps Address’ entry within the Property Address Format Parameters.

<u>Property Address Format Parameters</u>

To adjust the primary Property Address to Google Maps location, insert and activate a new Address Format with a description of ‘Google Maps Address’.



The optimal formatting rule is dependent on the content of the address components within the Council installation however the example shown below will be adequate in most cicumstance.



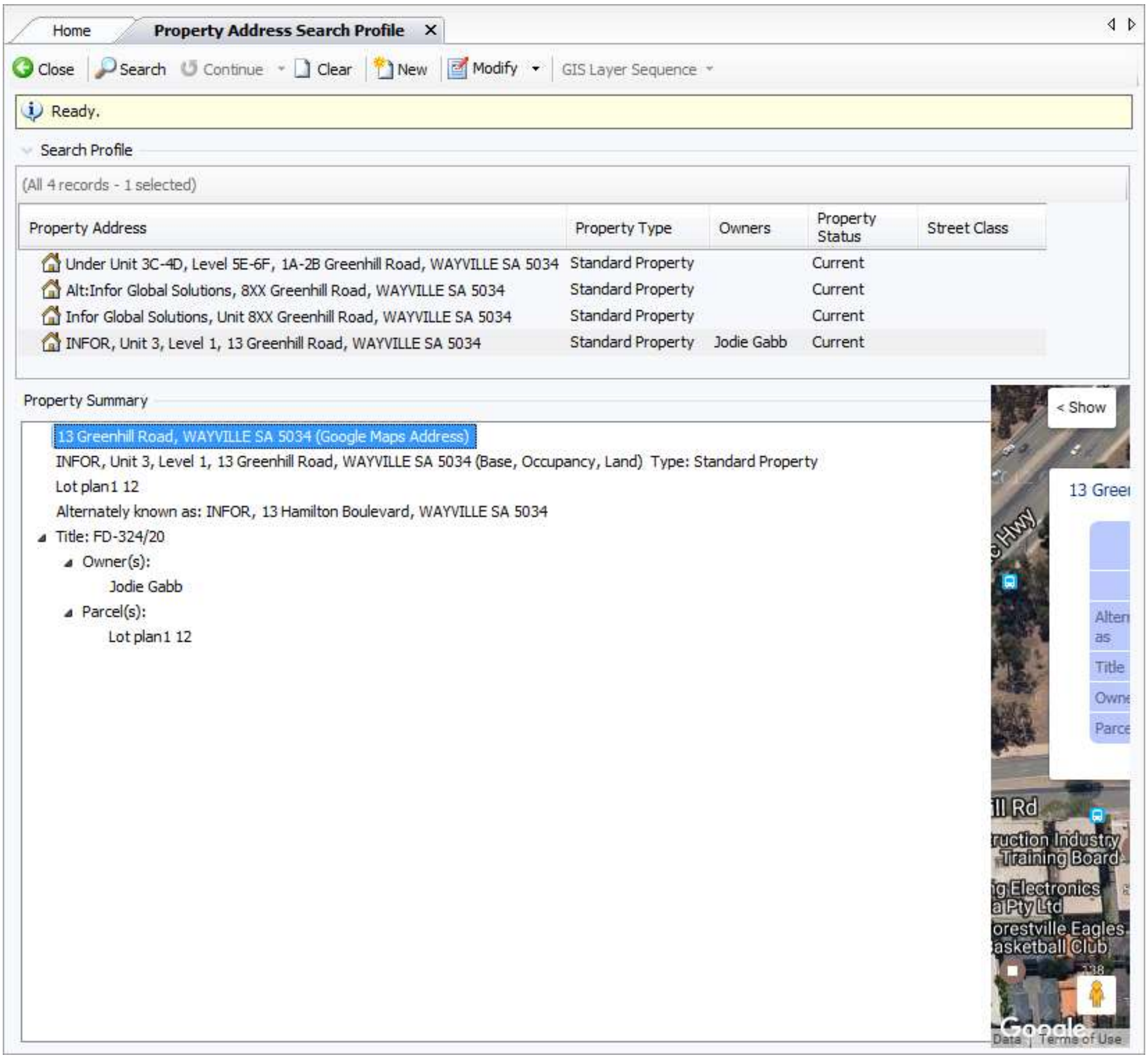
The ‘Google Maps Address’ Address Format is only used to construct the location provided to Google Maps and has no implication to the way that Property Addresses are presented elsewhere within the system.

The new ‘Google Maps Address’ Address Format is deployed upon a [Refresh] of the Application Server.

Property Search Profile

Having a ‘Google Maps Address’ address format should greatly reduce the frequency that Google Maps fails to locate a search result item.

The only visible change within the system is the addition of a new (Google Maps Address) item to the search results summary box when it differs to the primary Property Address.


Home
Property Address Search Profile
Close
Search
Continue
Clear
New
Modify
GIS Layer Sequence
Ready.
Search Profile
(All 4 records - 1 selected)
Property Address
Property Type
Owners
Property Status
Street Class
Under Unit 3C-4D, Level 5E-6F, 1A-2B Greenhill Road, WAYVILLE SA 5034 Standard Property Current
Alt:Infor Global Solutions, 8XX Greenhill Road, WAYVILLE SA 5034 Standard Property Current
Infor Global Solutions, Unit 8XX Greenhill Road, WAYVILLE SA 5034 Standard Property Current
INFOR, Unit 3, Level 1, 13 Greenhill Road, WAYVILLE SA 5034 Standard Property Jodie Gabb Current
Property Summary
13 Greenhill Road, WAYVILLE SA 5034 (Google Maps Address)
INFOR, Unit 3, Level 1, 13 Greenhill Road, WAYVILLE SA 5034 (Base, Occupancy, Land) Type: Standard Property
Lot plan1 12
Alternately known as: INFOR, 13 Hamilton Boulevard, WAYVILLE SA 5034
Title: FD-324/20
Owner(s):
Jodie Gabb
Parcel(s):
Lot plan1 12
< Show
Google
Data
Terms of Use

Rates Accounting

Enhancements

Rate Notice Report

InforXtreme Incident:	DRN: 30028	Fix: 03107010;
SMART AND THICK CLIENT;	KB:	

RATE NOTICE REPORT CONTROL

A new item, 'RATEPAYER_PREFDLMTHD', has been added to the DATASTRING field on the export table, LRPRA14. This contains the preferred document delivery method of the first listed ratepayer against the relevant assessment. It is a single-character code corresponding with one of the valid role-level preferred delivery methods; 'E' for E-mail, 'F' for Fax, or 'P' for Post. If the preferred delivery method has been overridden against the relevant ratepayer role record, the code will correspond with that value; otherwise, the code will correspond with the preferred delivery method at the identity level, with 'P' the default. The 'RATEPAYER_PREFDLMTHD' data string field can be added to existing Rate Notice Report export files by using Rates Accounting >> Housekeeping >> Export Format Data String Maintenance and selecting 'Ratepayer Preferred Delivery Method' from the 'Ratepayer Details' group.

Receipting

Enhancements

IMPORTANT NOTICE for Pathway Release 3.10.008

With the release of Pathway 3.10.008 the Receipting module will **no longer be able to receipt to Animals using the Thick Client.**

With the release of Pathway 3.10.008 the Animal Registration module will **no longer be available for the Thick Client.** This is due to the large number of changes required to support new functionality requested by our customers. Where there is no pre-existing Smart Client form for a function then the Thick Client will still be used. For example: Animal Renewal.

External Receipt Import

InforXtreme Incident: COGC 10659816;	DRN: 30337	Fix: 03107010;
SMART CLIENT;	KB:	

EXTERNAL RECEIPT IMPORT CONTROL

In the smart client, a checkbox field, *Append Suffix from File Payment Type*, has been added to this form. It is enabled only when no *Payment Type* value has been specified. If selected, the payment type suffix for the payment type on the import file (if any) will be appended to the bank reference for the corresponding external receipt.

In addition, if the *Banking Reference Mandatory* and *Banking Reference Formatting* options have been selected in Receipting system parameters, the given *Bank Reference* value will now be validated against the format for the selected drawer, or, in the absence of a format at the drawer level, the format specified in Receipting system parameters.

Smart Mobile CityWatch

Enhancements

CityWatch Bookings

InforXtreme Incident: INFOR 10175112; SMART AND THICK CLIENT;	DRN: 30094 KB: 1873350;	Fix:

MOBILE BOOKINGS EMAILS AND STATUS

The CityWatch Bookings module now allows for delivery an of an email to the user who makes the booking. It uses the same email parameters established for ePathway.
Changes have also been made to Mobile Bookings to ensure the Booking status is set to ‘Awaiting Response’ where no fees or no auto-load fees are present on the booking.

Smart Mobile CityWatch

InforXtreme Incident:	DRN: 30230 KB:	Fix:

MESSAGES

The term 'CityWatch' has been removed from all messages displayed to the user. For example, the message ‘Connecting with CityWatch’ has been changed to ‘Establishing connection’. Also, specifcally the message ‘Reloading App’ has been changed to ‘Installing…’.

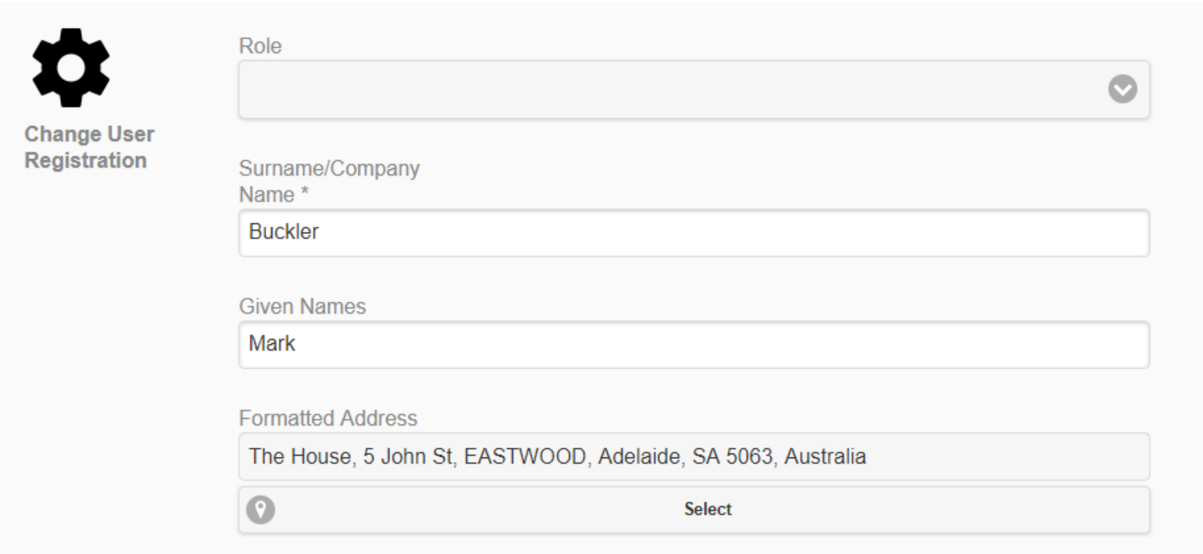
CityWatch User Registration

InforXtreme Incident:	DRN: 30174 KB:	Fix:

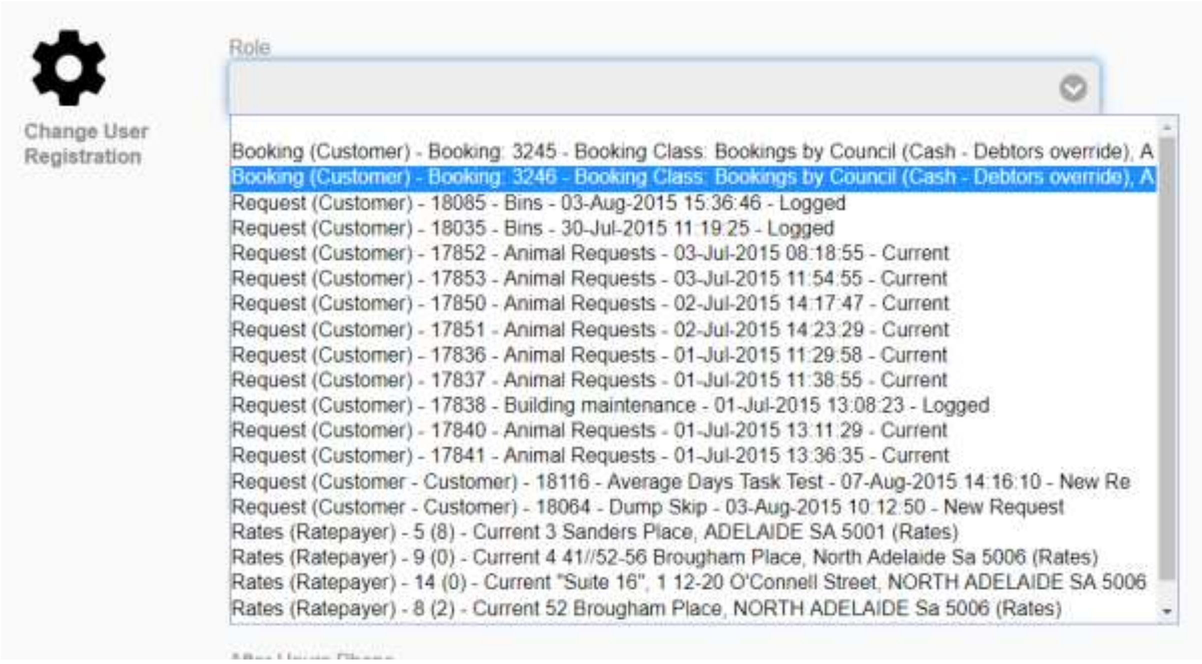
UPDATING CONTACT DETAILS

The CityWatch “Change User Registration” function has been extended to allow for updating certain information at the customer role level.

On the Change User Registration page, a new Role dropdown list has been added to allow users to select the Role they wish to update. This defaults to their Customer Profile (blank list item):

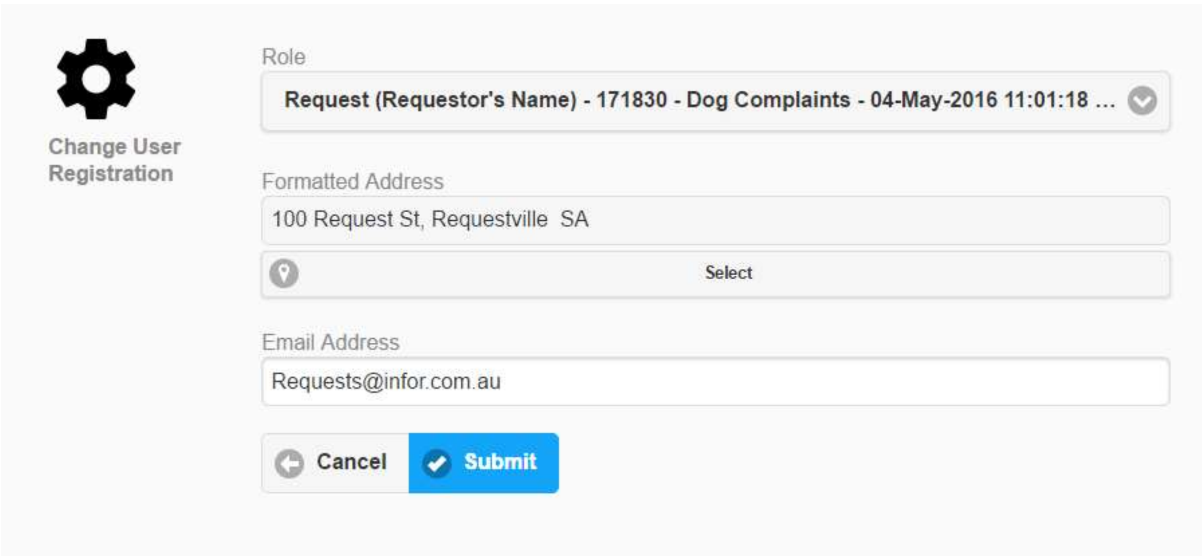


Clicking on the drop down list shows all roles associated with the user:

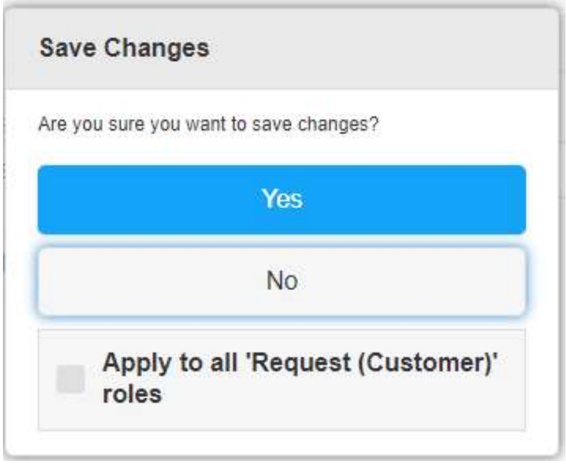


NOTE: You can restrict the number of roles in the list by setting the maxRolesToDisplay setting in the config.js file. The default value is 30, which would mean that the 30 most recently created roles will be displayed (per Module Role Type).

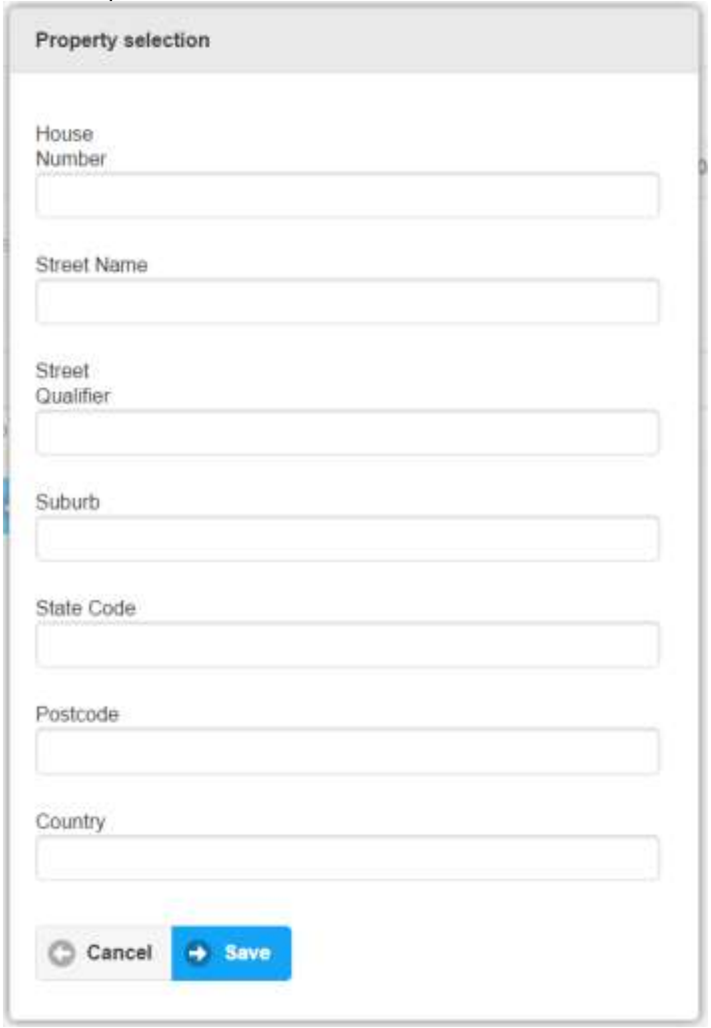
Selecting a Role will populate the Address and Email Address fields with the current values for that Role:



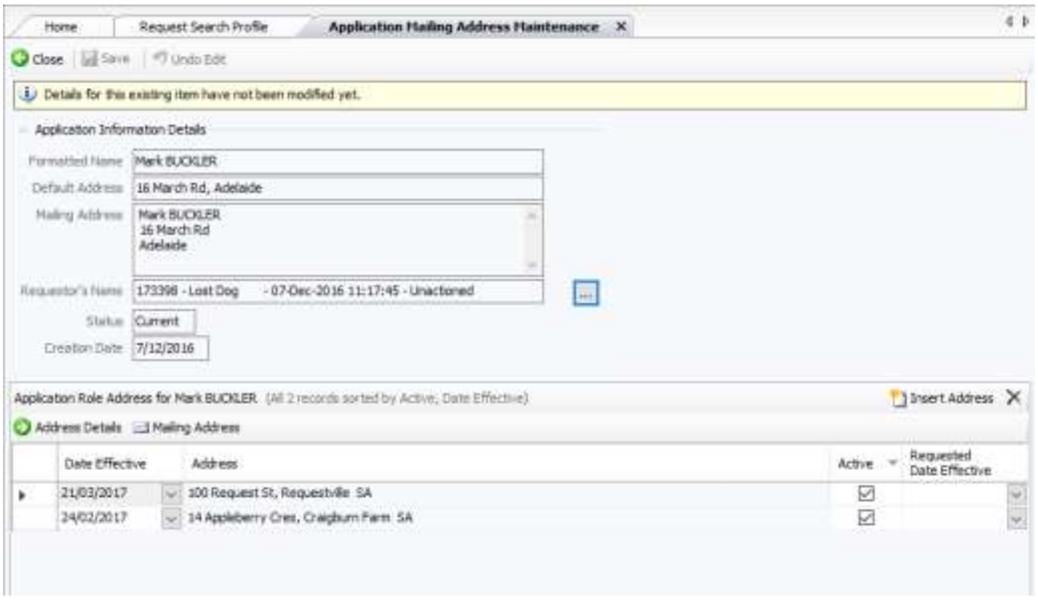
Making a change to either of these fields and clicking Submit will update the Role directly in Pathway if the *autoEditRegistration* setting is set to TRUE in the config.js file. On clicking Submit, user will also be given the option to apply their changes to all roles of that type (e.g. Requests, Bookings, etc):



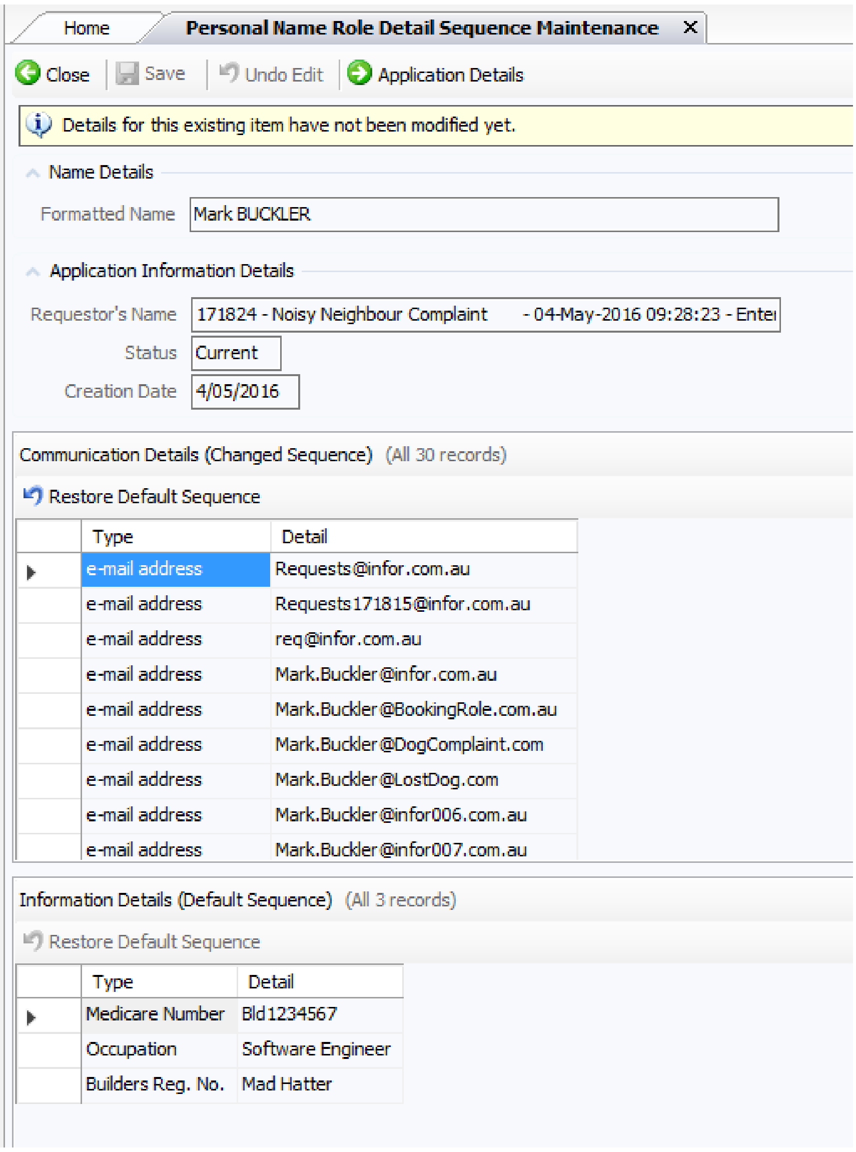
Note that in 'Auto Edit Registration' mode, the Address may be entered via a 'Property Select' mechanism allowing for a match in Pathway. If no match is found then, the Address is automatically created in Pathway. For example,



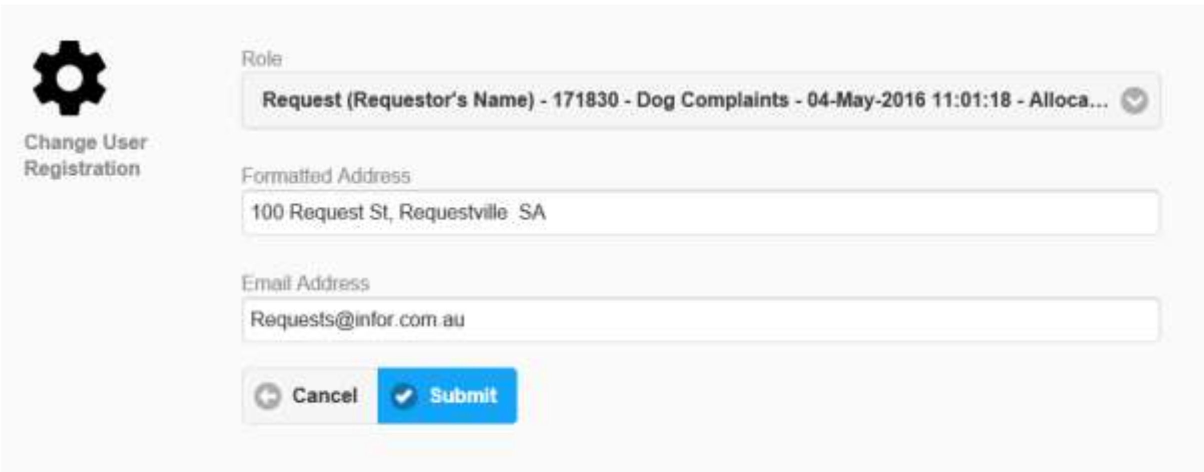
When any Role change has been submitted in 'Auto Edit Registration' mode, Pathway should immediately reflect those changes. This implies that the changed address will override the previous address on the Application Mailing Address Maintenance form:



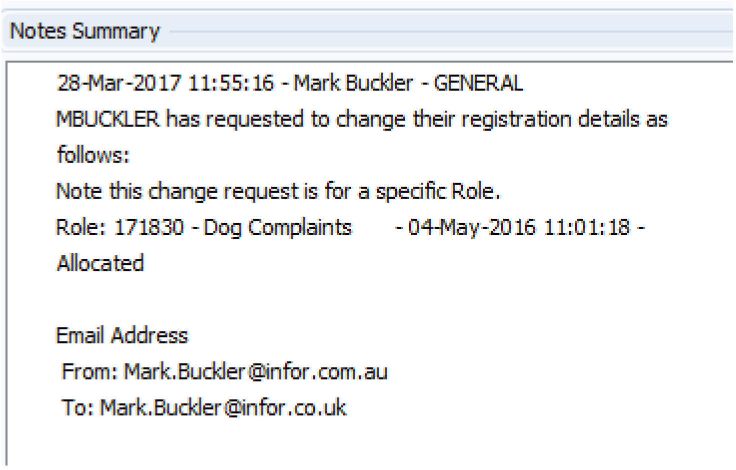
Additionally, a changed email address will be added to the Communication Details list (if it didn't previously exist) as well as being promoted to the top of the Communication Details Sequencing on the Personal Name Role Detail Sequence Maintenance form:



If 'Auto Edit Registration' mode is switched OFF, the Address field will simply be a free text field that will need to be keyed by the user and subsequently manually reconciled by Council Officer(s) when the 'Change User Request' notification arrives:



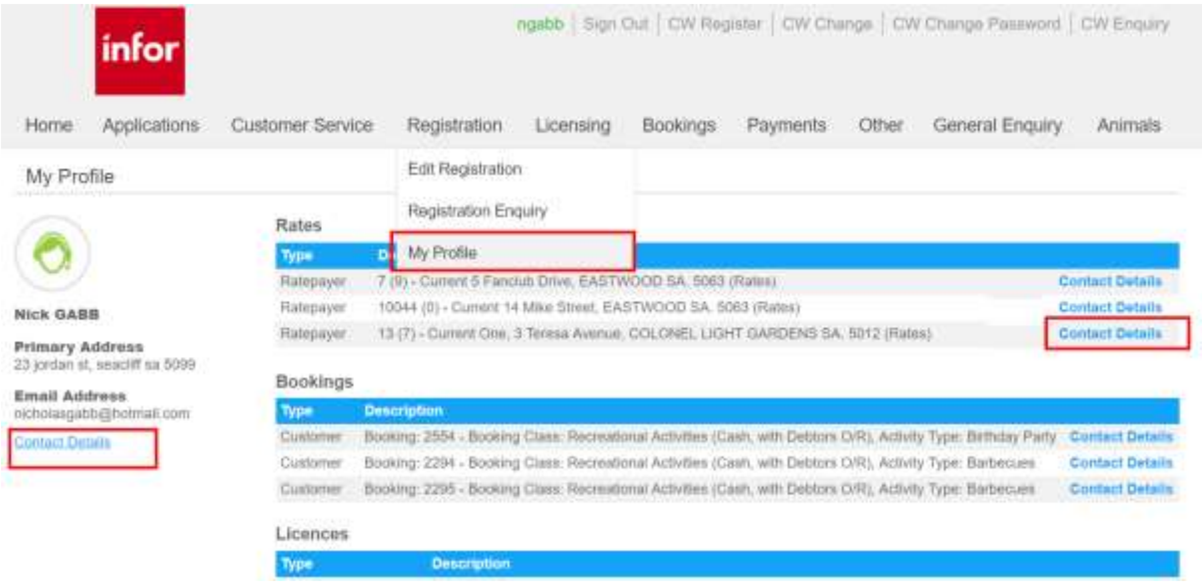
A 'Change User Request' email would have been issued and a Request record (if configured) will contain the details of the changes. For a Role based changes, there is additional text at the top of the Notes Summary to highlight the fact that this is a Role change only:


Notes Summary

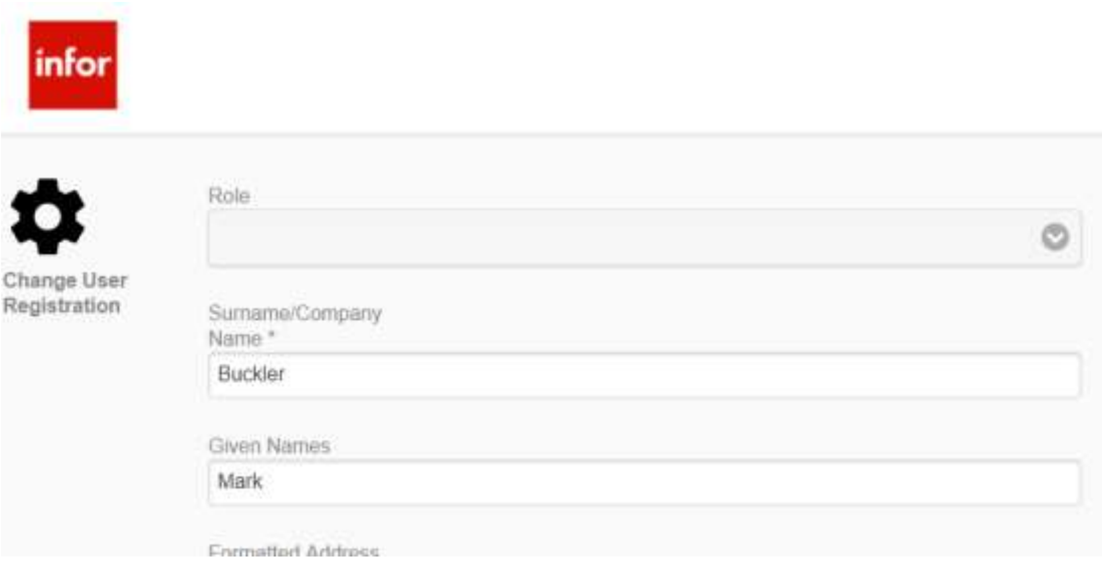
28-Mar-2017 11:55:16 - Mark Buckler - GENERAL
MBUCKLER has requested to change their registration details as follows:
Note this change request is for a specific Role.
Role: 171830 - Dog Complaints - 04-May-2016 11:01:18 - Allocated

Email Address
From: Mark.Buckler@infor.com.au
To: Mark.Buckler@infor.co.uk

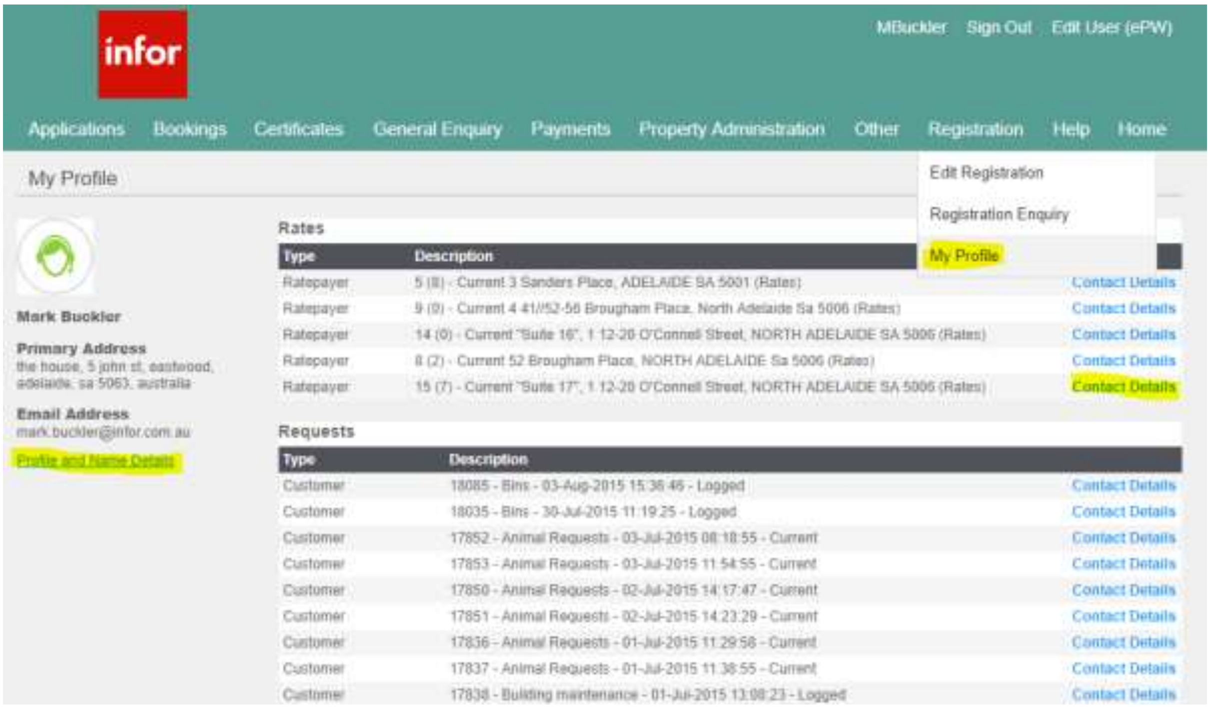
ePathway User Registration – Updating Role Details
The Registration Menu option in ePathway now includes a "My Profile" option. This option allows for a user to view all their roles with Council and where CityWatch is in use, it allows them to update contact details per role.



The 'Profile and Name Details' hyperlink on the left-hand side of screen will take the user to the 'Change User Registration' screen in CityWatch. The Customer Profile details will be displayed and available for update.



Similarly, the ‘Contact Details’ hyperlink adjacent each role will take the user to the ‘Change User Registration’ screen however, the specific role and its contact details will be displayed and available for update.



Note: The Contact Details hyperlink against each role will only be displayed if Council has CityWatch User Registration enabled (i.e. `MobileUserRegistrationOn` set to TRUE in the ePathway web.config file).

The number of role records displayed on the My Profile screen is controlled by the *Search.RecordsPerPage* ePathway System Setting. In the example here, this is set to 3.

Also, it should be noted that for the redirect from ePathway to CityWatch to take place, the *PathwayUser.UserName* and *PathwayUser.Password* credentials are used. These will be defaulted to PUBLIC for Council but they may be changed in the ePathway web.config file if required. For example:

```
<add key="PathwayUser.UserName" value="PUBLIC" />
<add key="PathwayUser.Password" value="PUBLIC" />

</appSettings>
```

Smart Mobile Customer Service

Enhancements

Smart Mobile Customer Service

InforXtreme Incident: ROCK 10470546;	DRN: 30232 KB:	Fix:

SIGN ON PERFORMANCE IMPROVEMENT

Significant performance improvements have been made around the Customer Service Application's sign on process.

Valuations

Enhancements

Valuation Maintenance

InforXtreme Incident:	DRN: 30237	Fix: 03107007;
SMART CLIENT;	KB:	

VALUATION MAINTENANCE

Enhancements have been made to improve the performance when selecting a Community Title for a VG Number. This is only relevant when Council has the 'Community Title in use' Rates System Parameter checked On.

Word Processing

Enhancements

Electronic Document Delivery

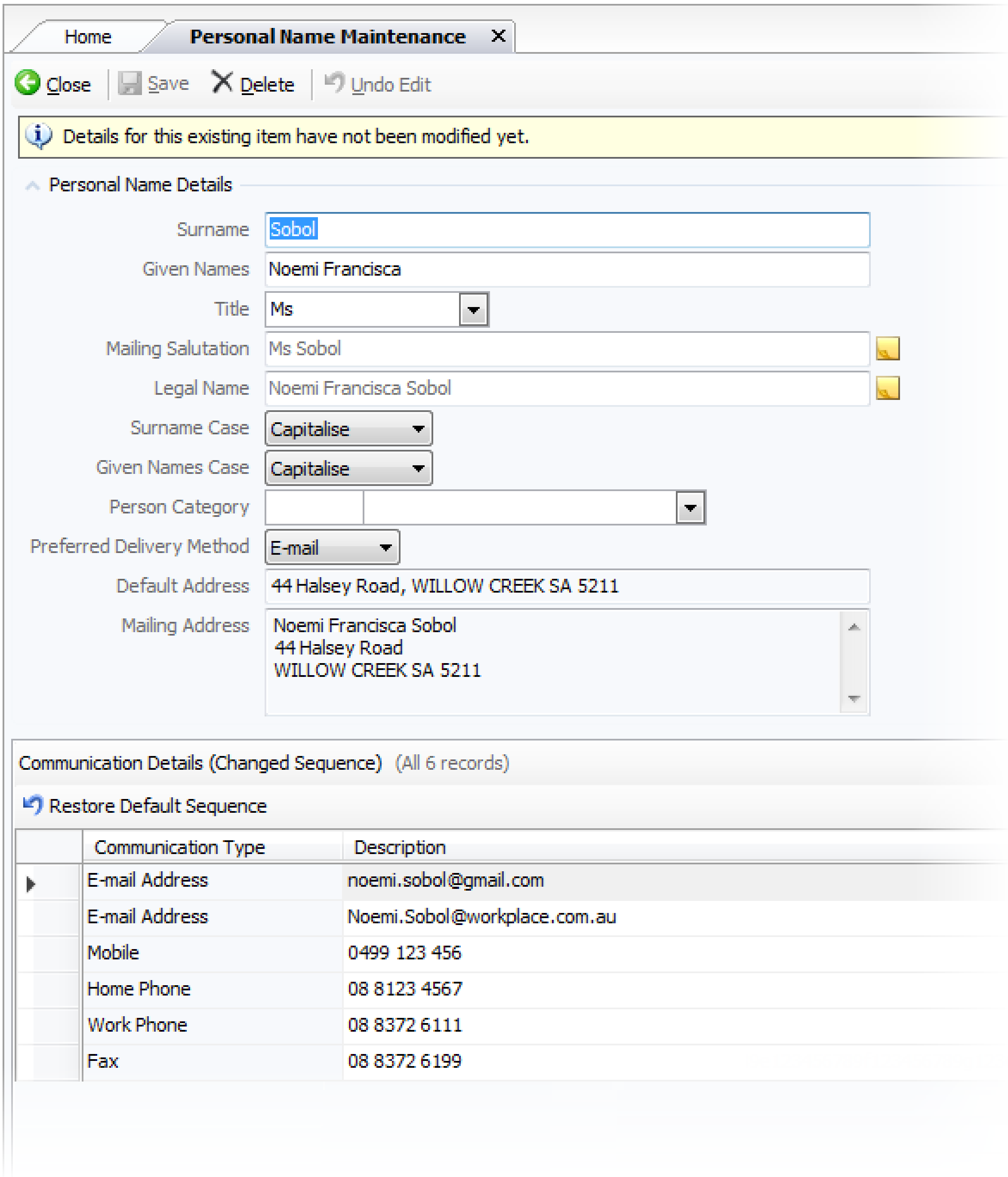
InforXtreme Incident: MBRC 7584090; CCC 6812833; MORE 7788720; INTERN 7825719; MARO 5107619; MBRC 9568445; MBRC 9692256;	DRN: 29915	Fix:
SMART AND THICK CLIENT;	KB:	

ELECTRONIC DOCUMENT DELIVERY

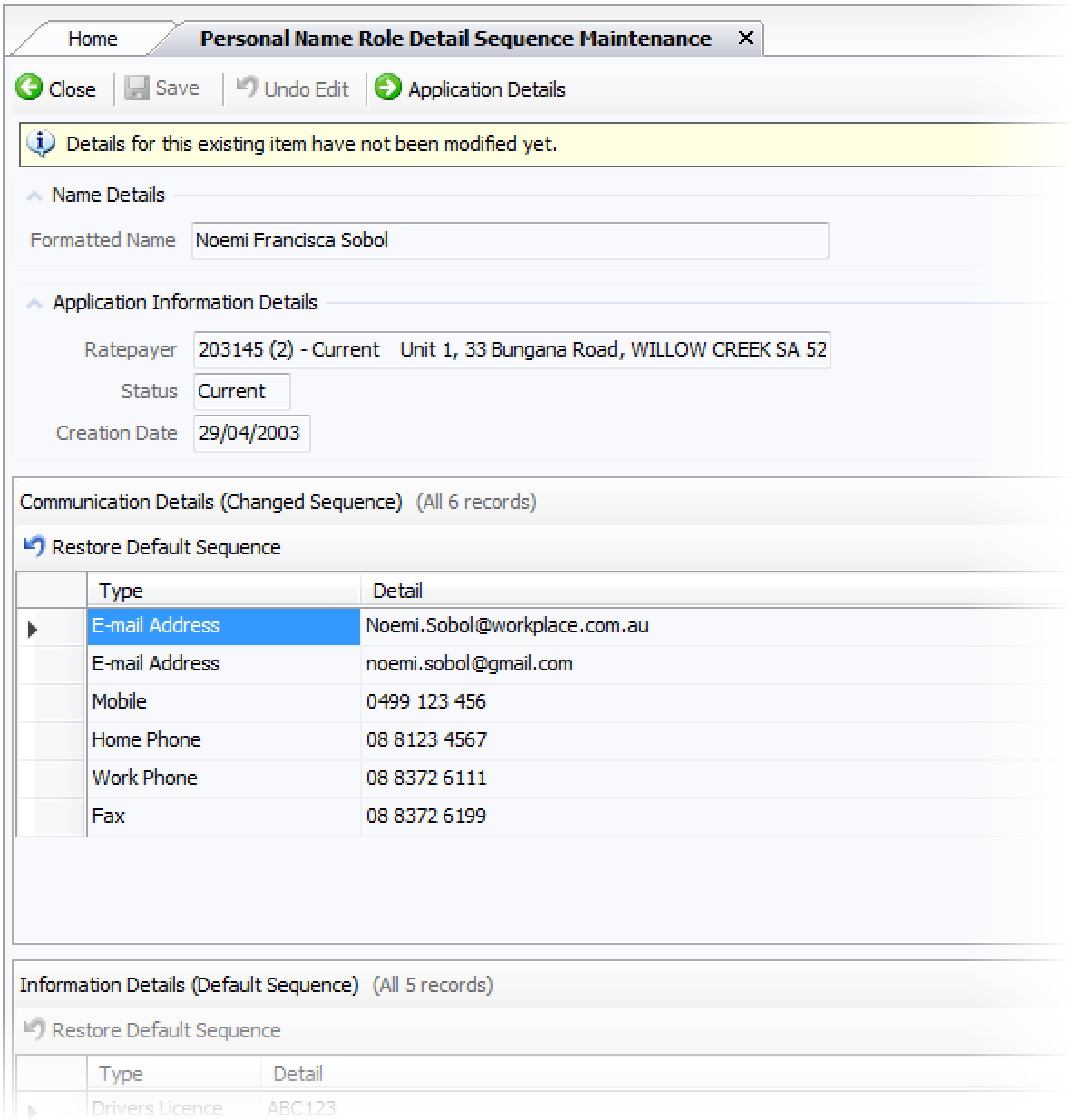
When determining the e-mail address or fax number to use for electronic document delivery, Pathway now honours the sequence of communication details against the name role that the document is associated with, if any.

The first sequenced e-mail address or fax number against the relevant name role is the one used, and it may differ from the first sequenced e-mail address or fax number specified on the name record.

For example, given the name record in the following figure, all documents would be delivered electronically to the address *noemi.sobol@gmail.com* by default, as that is the first sequenced e-mail communication detail.



However, based on the overriding e-mail communication detail sequence in the next figure, documents related to Noemi Sobol's role as ratepayer for assessment 203145 would be electronically delivered to the address *Noemi.Sobol@workplace.com.au*, as that is the first sequenced.



To access the Personal Name Role Detail Sequence Maintenance form:-

Detail out to the Name screen from the module (Applications for example), then click on Default Address.

Then in the bottom frame where the Role Address is displayed click on Contact Details.

The Application Mailing Name Maintenance is then displayed.

In the Options Pane on the left hand side there is the "Personal Name Sequence" option.

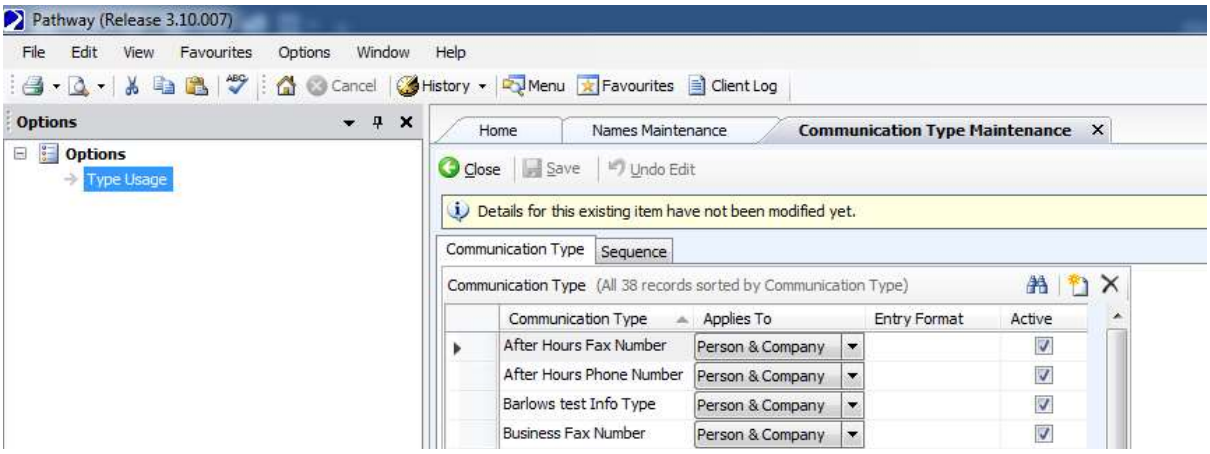
IMPORTANT: It should be noted that if the primary addressee for a document has a customer profile, and the document request is related to a Customer Profile function such as Property Certificate Request, the e-mail address to be used for electronic delivery **will be taken from the relevant Customer Profile settings.**

Overriding the Communication Type
For communication type usages such as E-mail and Fax, it is now possible to specify override communication types to use for given role types.

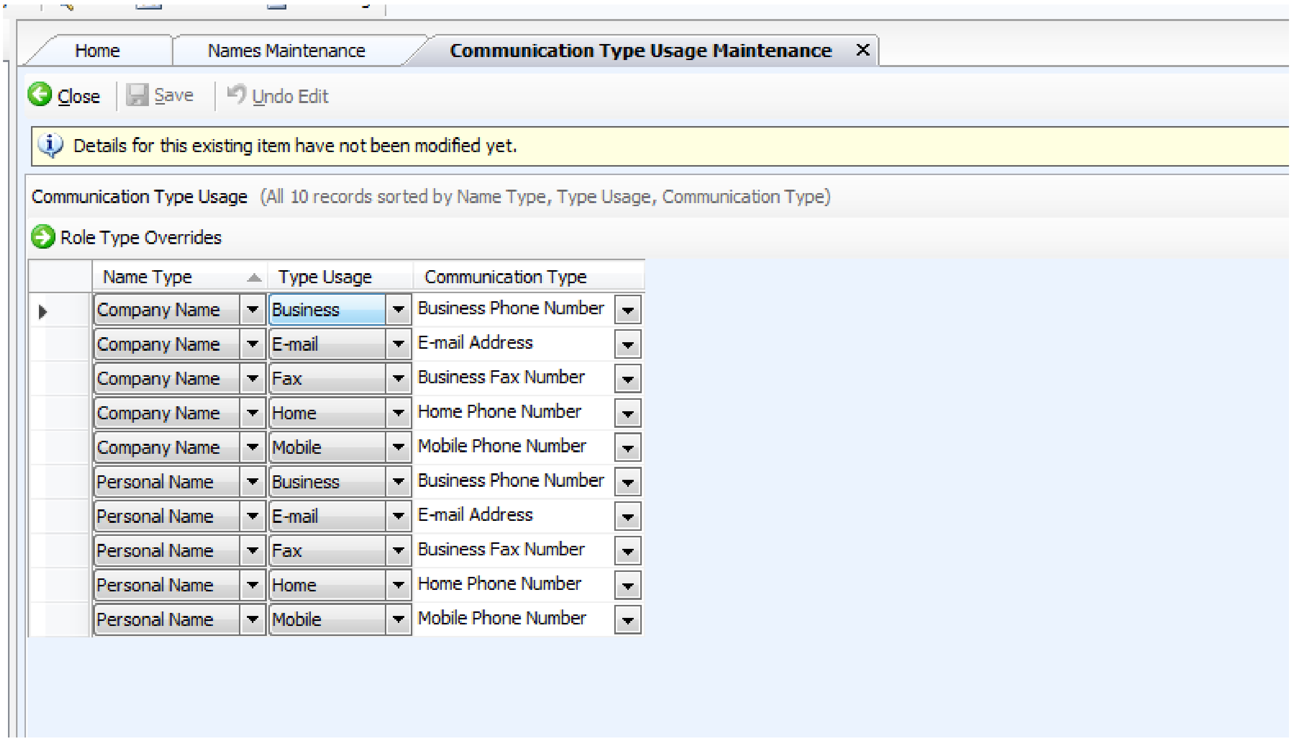
For example, if *E-mail Address* was the default communication type that determined e-mail addresses for electronic document delivery, it is now possible to specify that, say, *Ratepayer E-mail Address* should be the communication type that determines e-mail delivery addresses for documents associated with the Ratepayer role type.

This is done via Name and Address Register >> Name and Address Parameters >> Communication Type Parameters.

Select **Type Usage** from the Options pane.



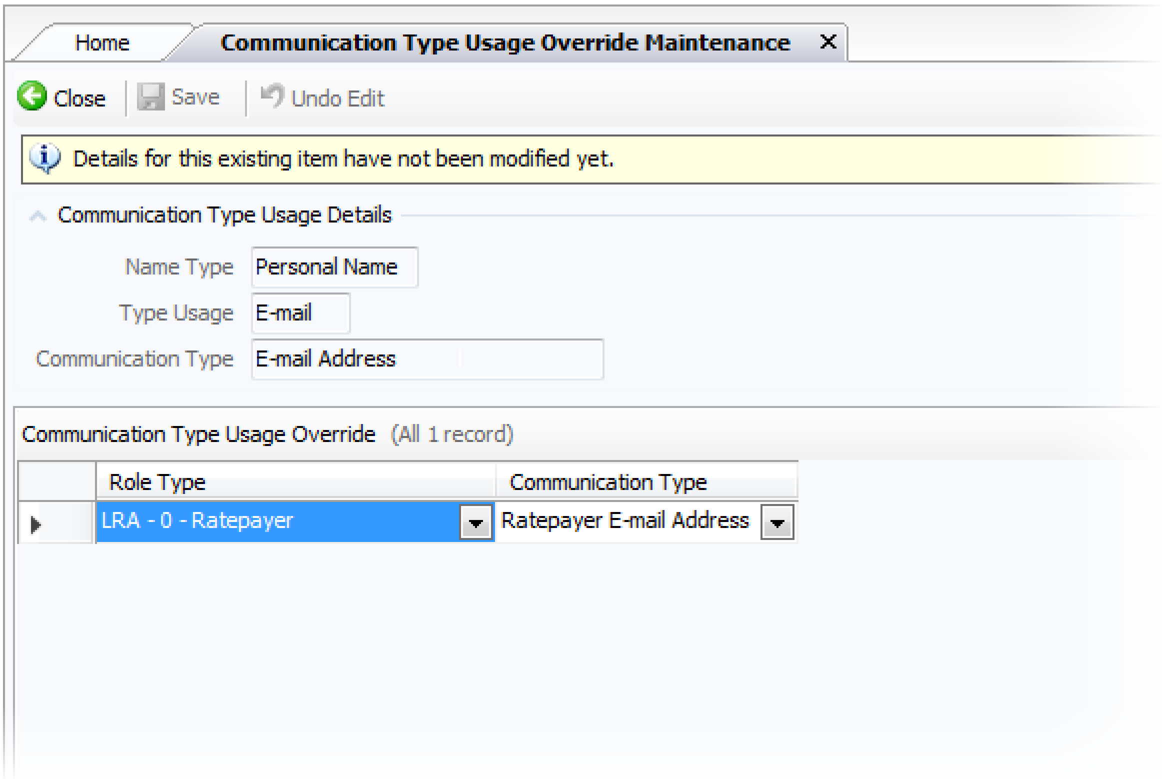
The following form is displayed.



If we wanted to override the Communication Type that is used for E-mailing Rates Letters/Notices then we get focus on Company Name with a Type Usage of E-mail, then click on the Role Type Overrides button.

The Communication Type Usage Override Maintenance form is displayed.

Click on the Insert Button to insert a row, then select the appropriate Role Type you wish to override, then select the Communication Type that should be used.



If a given name has no communication details corresponding to a particular override communication type, details for the default communication type (if any) are used instead.

Information type usages can also be overridden at the role type level.

Document Generation

InforXtreme Incident: SMART AND THICK CLIENT;	DRN: 30028 KB:	Fix: 03107010;

EXTRACT FIELDS

Two new Word Processing related extract fields, *Document_Applicant_Email* and *Document_Delivery_Method*, have been provided for use in all merge types. The *Document_Applicant_Email* value is the e-mail address that applies to the first addressee as at the time of document generation, and *Document_Delivery_Method* contains the projected method of delivering the document at the time of document generation. The possible values follow:

- *E-mail*
- *Fax*
- *None*
- *Post*
- *Web File*

The value extracted should match that shown against the relevant link in Document Request Maintenance.

The underlying values of both fields may change between the time the document is generated and the time that it is delivered. If the document request is associated with a Customer Profile function, the values of both fields are determined by the relevant Customer Profile parameters; otherwise, the values are taken from the standard Name and Address settings. The *Document_Delivery_Method* value may also depend upon overrides at the merge type level. For Customer Profile related documents, the *Document_Applicant_Email* value will not be populated if the relevant function’s delivery method is *Post*.

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