



# **STD004 – Activities – Setup in GovAdm**

**Activities – Setup in GovAdm V10.8**

**Release 6.0 Version 1**

**Last Revision Update: 2014/06/12**

## Version History

Version	Date	Modify By	Description
1.0	2015/05/21	Eric Plante	Create document

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## Summary

This document tells how to set up activities in GovAdm.

## Description

Activities are a bunch of steps to perform in order. Each step process some actions for a workflow. This document is about how to setup the activities in GovAdm that can't be performed in the .Net suite.

## Database

The following query is used to link a workflow type to a profile key type. Doesn't apply to permits.

```
Update PM_TYPE
set ENTRY_KEY_TYPE = '<key type>' --p_id, na_id, st_id, etc
  ,CATEGORY = '<category>' --optional, used to filter the types
where DEPT_ID = '<dept id>'
  and key_type = 'co'
  and PM_TYPE = '<pm type>' -optional
```

## Generate SRT

When processing a step, it is possible to generate a srt account. There are no UI to set it up, queries have to be executed to do so.

- In table PM\_ACTIVITY:
  - o Column CREATE\_NEW determines if something needs to be created when a step is processed.
  - o Column GENERATE\_SRT determines when to generate the account
    - 0 = When the step is initiated.
    - 1 to 4 = the completion status
    - NULL = never
  - o Column CATEGORY\_CODE is used by the account creation

```
update PM_ACTIVITY
set GENERATE_SRT = <completion status>,
  CATEGORY_CODE = 'SUT',
  CREATE_NEW = -1
where ACTIVITY_NO=<step no> and DEPT_ID='<dept id>'
```

## Configuration

The following steps are the basic setup to make activities work. There are more ways to customize the activities, refer to the main document for a more exhaustive understanding of them.

- Open GovAdm
- Select Parameters in the menu
- Select Land Management
- Select Parameters

- Select a department
- Select Maintain in the menu

## Maintaining a Type

Activities requires a Type to be linked to and it is created and maintained in GovAdm also but the setup of the control itself is in document STD002-FRM - Workflow.docx.

- In Land Management Parameters, select Definition of type
- Select the functionality you want the Type to be linked to.
  - o Workflow = Complaint with a twist.
  - o The twist here that you will have to execute a query to feed Entry\_Key\_Type with the workflow's key to link the type to. See the Database section to get the query template.
  - o If you need to, create a new type or Browse for one.
    - At this point you can manage Added Fields (Columns) and Activity Steps. There is a button for each.

## Added Fields

- You can select or create new added fields (Columns)
  - o NB: Once created, you cannot edit them afterward
- This document is not about how to setup added fields, see the Govern documentation for more detail but there is a twist here to make the added field work correctly in Govern.Net
  - o If you simply select added fields what you will see in Govern.Net are textboxes with the name of the added fields, not the description
  - o The twist is:
    - Open Govern for windows
    - Search for records.
    - Open the workflow functionality
    - Create a new workflow
    - Select your type
      - At this point you should see your added fields
    - Click the Setup menu and select "Field Setup Mode"
    - Double click on the label of your added field
    - Give a description and click OK.
    - Double click on the field's control then click OK
    - Click the Setup menu and select "Save Current Form Size"

## Activity Steps

The following assume you want to create a new step but if you only want to modify one, browse for it and customize it to your need.

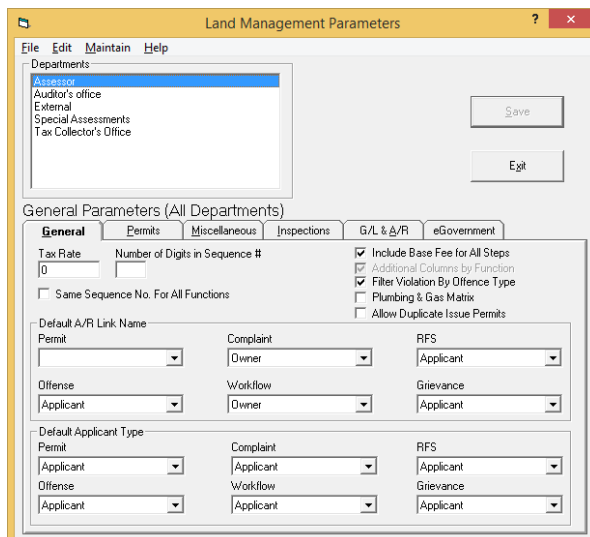
- Click the new button and fill the Step Number and the description
- Select the activities to perform for the step and click the A button (R button is to remove an activity). This is optional, you can have a step that doesn't perform actions.
- Select a default answer. This is the selected default completion answer when the user wants to complete the step.

- Setup the next step number to show after this step is completed depending on which status is selected.
  - o You have 4 possible completion statuses and each can go to a different step.
    - Step 9999 stops the chain of steps.
  - o Fill at least one of them.

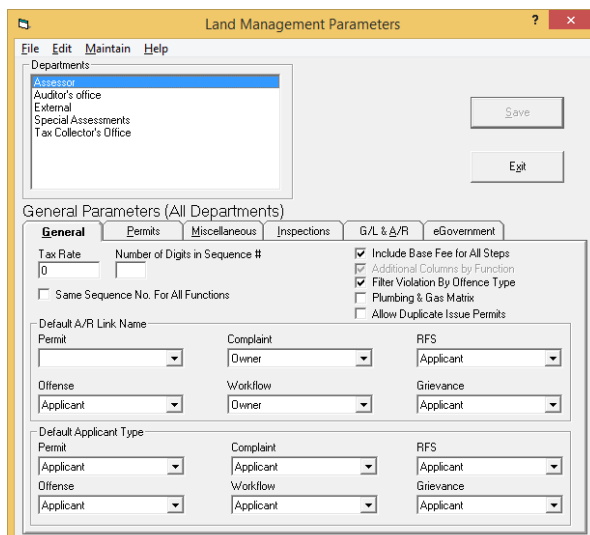
This is what is mandatory to set up to have a functional step. See Govern documentation to know how to setup the other options.

- Generate SRT account
  - o This is a new option that doesn't have a UI to set it up. See the database section for the queries to execute to set it up.

## UI



The screenshot shows the 'Land Management Parameters' dialog box. It has a menu bar with 'File', 'Edit', 'Maintain', and 'Help'. Below the menu bar is a 'Departments' list with 'Assessor' selected. To the right of the list are 'Save' and 'Exit' buttons. Below the list is a section titled 'General Parameters (All Departments)' with tabs for 'General', 'Permits', 'Miscellaneous', 'Inspections', 'G/L & A/R', and 'eGovernment'. The 'General' tab is active. It contains several settings: 'Tax Rate' (0), 'Number of Digits in Sequence #' (0), 'Include Base Fee for All Steps' (checked), 'Additional Columns by Function' (checked), 'Filter Violation By Offence Type' (checked), 'Plumbing & Gas Matrix' (unchecked), and 'Allow Duplicate Issue Permits' (unchecked). There are also sections for 'Default A/R Link Name' and 'Default Applicant Type' with dropdown menus for 'Permit', 'Complaint', 'Workflow', 'Offense', and 'RFS'.



This is a duplicate of the screenshot above, showing the 'Land Management Parameters' dialog box with the 'General' tab selected. The settings are identical to the previous screenshot.

**Permit Type Maintenance**

File Edit Maintain Help

Department: Assessor  
Permit Type: BUSINESS  
Description: Business

**General** Sequences eComponents

Added Fields Form Id: \_\_\_\_\_

☐ Allow Quick Data Entry  
☐ Do not allow multiple  
☐ History

Estimated Cost Computation (Per SF):  
First Floor: \_\_\_\_\_ Other Floor: \_\_\_\_\_  
Logical Expression: \_\_\_\_\_

Fee Description: \_\_\_\_\_  
G/L Revenue Account: \_\_\_\_\_ %  
G/L Cash Account: \_\_\_\_\_

Restricted to the Following Functions:  
Licence to Name: \_\_\_\_\_

Work Codes Types: \_\_\_\_\_

Editing Existing Record (37/44)

New Save Delete Activity Steps Columns Browse Exit

**Additional Columns Setup**

Department: Assessor Permit Type: Business

Available Columns:

- basement\_size (Basement Size)
- DEPART (Department)
- estimated\_cost (Estimated Cost)
- first\_floor (First Floor)
- last\_fee (Last Fee)
- last\_fee\_date (Last Fee Date)
- mezzanine\_size (Mezzanine Size)
- nb\_of\_items (Number of Items)
- second\_floor (Second Floor)
- total\_dimension (Total dimension)

Added Columns:

- DEPARTMENT (Department)
- PERIOD\_CODE (period code)
- S\_DATE (Start Date)

Add <<>> <<- Remove Exit

New

**Activities Setup**

Department: Assessor Permit type: Business Step Number: 5000 Description: Start Process

Activities: 20000 (Launch Report + Send email) ☐ Mandatory Activity

Fee Calculation:  
Fixed Amount: \_\_\_\_\_  
Method: \_\_\_\_\_  
Initiate at: \_\_\_\_\_  
☐ Allow Fee & G/L Override

G/L Revenue Account #1: \_\_\_\_\_ %  
G/L Revenue Account #2: \_\_\_\_\_

Fee Description: \_\_\_\_\_

Status Code: \_\_\_\_\_ Initiate at: Initiation Default Answer: Completion Status 1

Next Step Number For:  
Completion Status 1: Yes  
Completion Status 2: No  
Completion Status 3: Not Needed  
Completion Status 4: End Process

☐ Automatically initialize the next step

Editing Existing Record (1/2)

New Save Delete Browse Notify User Notify Client Exit

**Permit System Activities**

File Edit Help

Department: Assessor Reference Number: 20000 Description: Launch Report + Send email + Updt + BR

**Page 1** **Page 2** **Page 3** **Page 4**

**Scheduling**

Type of Scheduling: [Dropdown]  
Initiate at: [Dropdown]  
Department: Assessor

**Generate Report**

Report Name: Audit Trail Inquiry  
Initiate at: Completion Status 1

**Multimedia**

☐ Multimedia Queue  
☐ Display Warning Message  
Multimedia Code: [Dropdown]  
Initiate at: [Dropdown]  
Hot Link Function: [Dropdown]  
☐ Auto-Launch

**Time Cost**

☐ Time Cost / Recovery  
Cost Code Used: [Dropdown]  
Initiate at: [Dropdown]

Business Rules Notify User Notify Client Action Query

Editing Existing Record (20/29)

New Save Delete Browse Exit

**Permit System Activities**

File Edit Help

Department: Assessor Reference Number: 20000 Description: Launch Report + Send email + Updt + BR

**Page 1** **Page 2** **Page 3** **Page 4**

**Starting**

Number/Date: [Dropdown] Starting at: [Dropdown]  
Initiate at: [Dropdown]

**Expiration**

Number/Date: [Dropdown] Expiration at: [Dropdown]  
Initiate at: [Dropdown]

**Creating New**

☒ Permit/License  
☐ Offense  
☐ Workflow  
Kind: License  
Department: Assessor  
Initiate at: Completion Status 1

Dept. Messages Permit Types

Business Rules Notify User Notify Client Action Query

Editing Existing Record (20/29)

New Save Delete Browse Exit

**Govern For Windows** YAVAPAI COUNTY

File Edit View Select Options Tools Setup Window Help

Object Dragging Mode  
**Field Setup Mode**  
New Database Columns...  
New Labels...  
New Command Buttons...  
Additional Form Dividers...  
Reset Custom Form Layout  
Browse Setup...  
Save Current Form Size

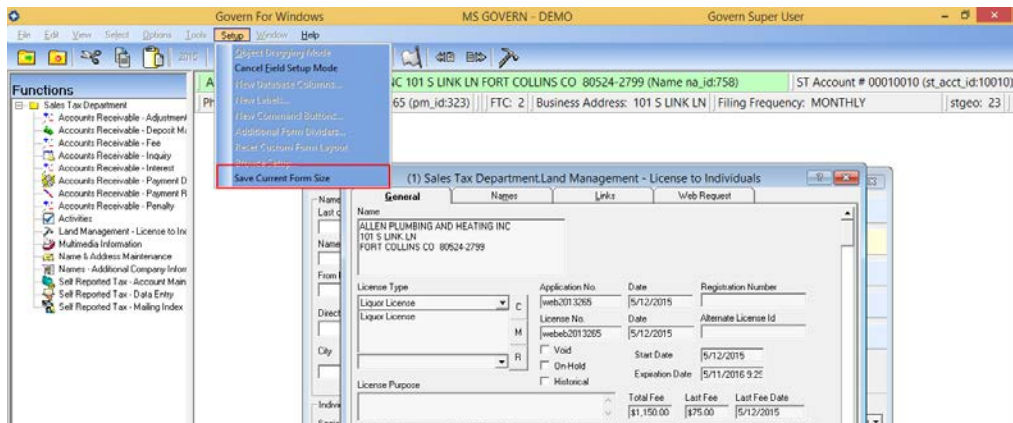
**TreeView**

- (1) Building Safety(Pm/Lic./Cert by Prop.
- Tax Map # 13 406-20-061 25 5
- Tax Map # 13 407-07-073 01 0
- Tax Map # 13 102-01-003 21 1
- Tax Map # 13 402-02-506 16 3
- Tax Map # 13 402-19-138 00 7
- Tax Map # 13 406-15-464 25 8
- Tax Map # 13 408-31-005 12 5
- Tax Map # 13 406-17-009 07 1
- Tax Map # 13 500-03-827 00 2
- Tax Map # 13 402-02-054 12 1
- Tax Map # 13 405-03-080 06 9

Anderson Family Trust Since Jan 2014 (Owner:1894...  
654475)

BS Application Hold BS Final Hold





The screenshot shows the 'MS GOVERN - DEMO' application window. The 'Functions' sidebar on the left lists various modules under 'Sales Tax Department' and 'Land Management'. The main window displays a form titled '(1) Sales Tax Department.Land Management - License to Individuals'. The form includes fields for Name, Address, License Type, Application No., Date, Registration Number, and Fees. A 'Save Current Form Size' button is highlighted in the top left of the form area.

**IET**

Not applicable

**Mobile**

Not applicable

**Security**

Not applicable

## Scenario