R&D

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103-wm-parm-302: Definition of Activities

Govern V6

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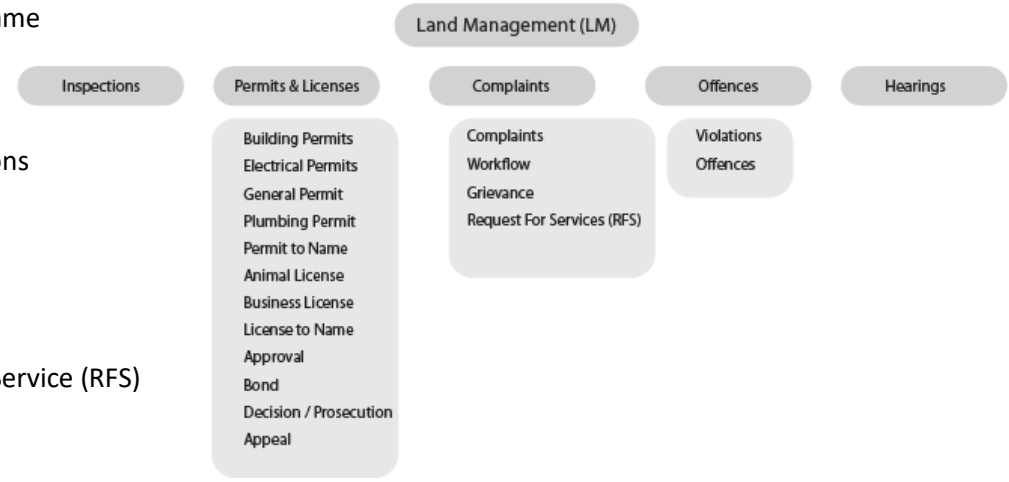
Introduction

Govern for Windows

Workflow Management is a module that is designed to replace the Workflow process that was associated with the Land Management (LM) module in Govern for Windows. In Govern for windows the LM Workflow process can be divided into the following five (5) areas with the associated sub-categories referred to as Kinds:

- Permits & Licensing (Multiple Kinds)
    - Building Permits
    - Electrical Permits
    - General Permit
    - Plumbing Permit
    - Permit to Name
    - Animal License
    - Business License
    - License to Name
    - Approvals
    - Bonds
    - Decisions
    - or Prosecutions
    - Appeal
- Complaints
    - Complaints
    - Workflows
    - Grievance
    - Request for Service (RFS)
- Offences
    - Violations
    - Offences
- Hearings
- Inspections

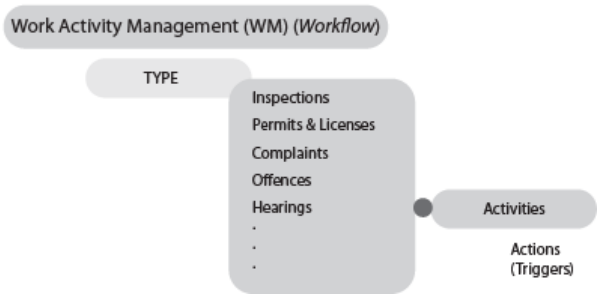


Within the above Kinds, there were Activities that surrounded the finalization process. These activities had Actions that could be automatic or triggered by the user.

Although functional, there were limitations to the structure. For example the number of Kinds were fixed. In some instances, users may need to create other types of Licenses, i.e. a Wedding License or a Death Certificate, this would necessitate the modification of existing Kinds, as an example.

Govern for OpenForms

Reviewing the limitations of Govern for Windows, the Workflow Activity Management was created. The structure allowed for a creating an unlimited number of processes, e.g. Permits, Licenses, Inspections, and so on, while maintaining the associated Kinds and Categories.

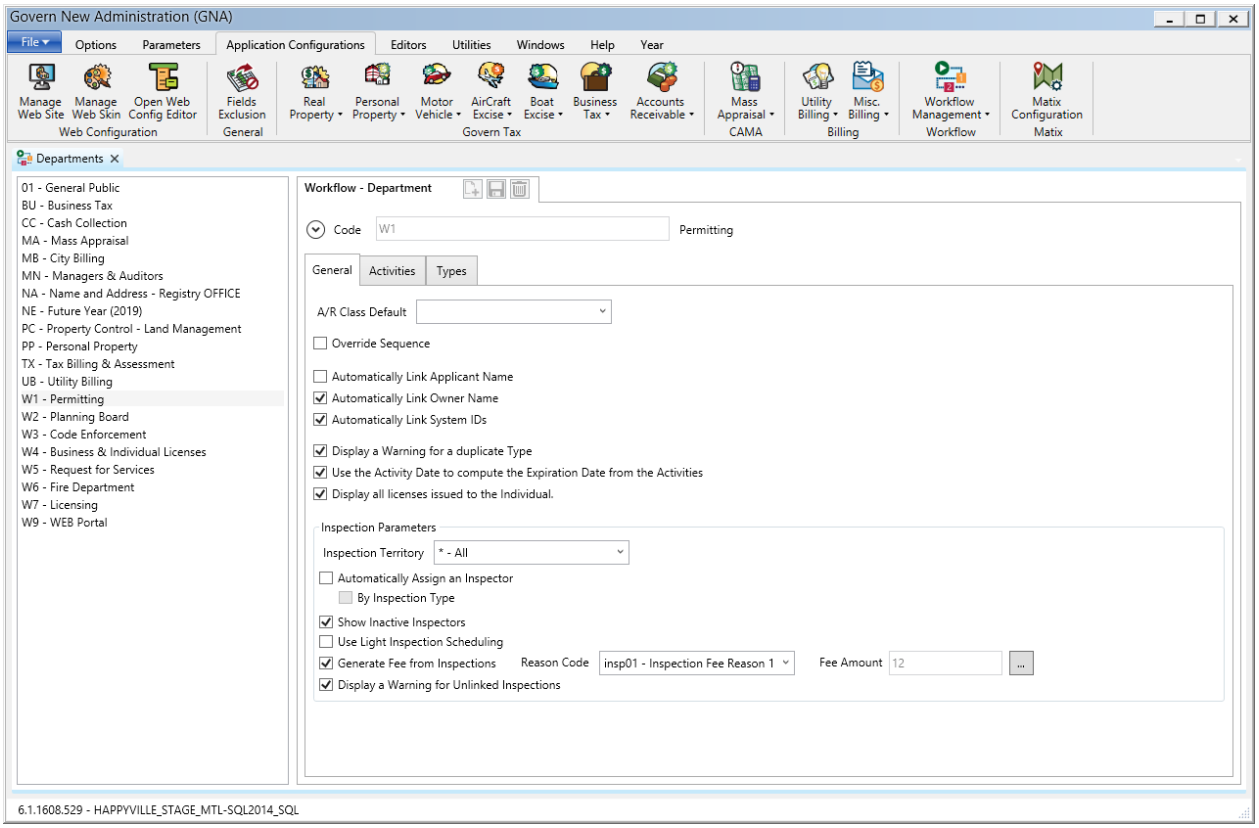


Overview

Workflow Management – Department

The **Workflow – Department** form provides a flexible method for creating and maintaining the *Kinds* and *Categories* required in Govern, e.g. Licenses, Complaints, Offenses, Permits, Workflows, and so on, as well any new ones that arise as a result of a business need. This is performed through the various interfaces in the *Govern New Administration* (**GNA**).

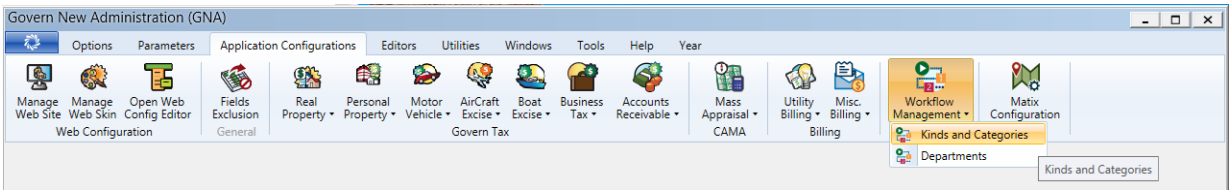
Parameters can be set at the department level, or for each permit or license type. If there is an overlap, a hierarchy is followed. Settings at the topmost specific level have the highest priority; i.e., those set for the permit or license type override those set for the department and those set for the department override those set for the organization.



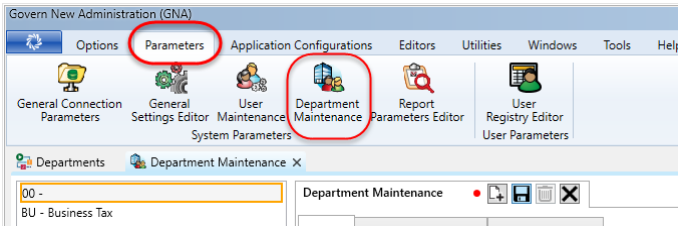
User Interface

The Workflow Management form with Parameters and Definitions is accessed through the Govern New Administration (GNA) under the Application Configurations menu. The menu from the icon has options for the following:

- Kinds and Categories
- Departments



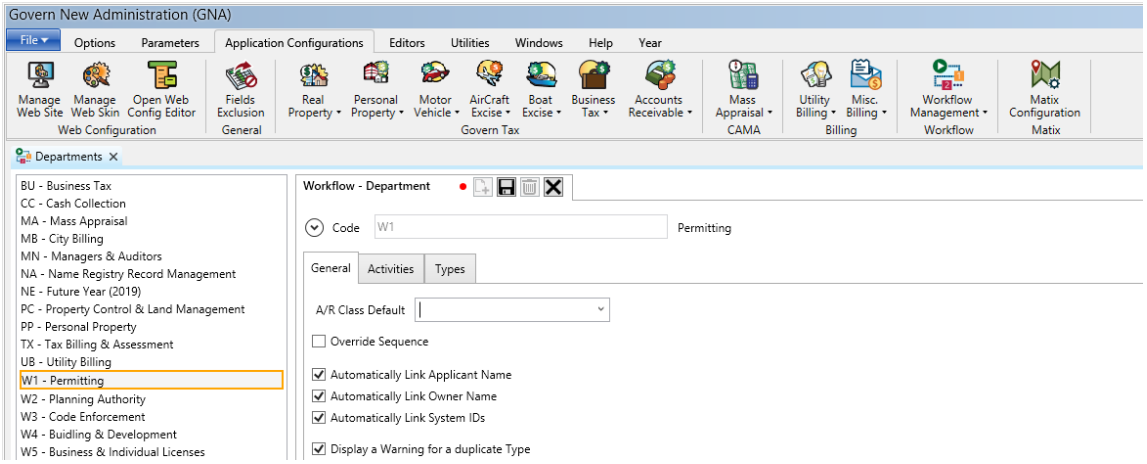
As is standard for Govern interfaces, lists are displayed on the left hand pane. As items are selected on the list the parameters and details are displayed in the central pane. In this interface the list of departments is displayed on the left hand pane (Table: **USR_DEPARTMENT**). Departments **cannot** be added through this interface, only Department parameters related to the Workflow can be modified. *Departments are created in the Department Maintenance form under the Parameters tab in the GNA ribbon. Refer to Govern Department Maintenance for details.*



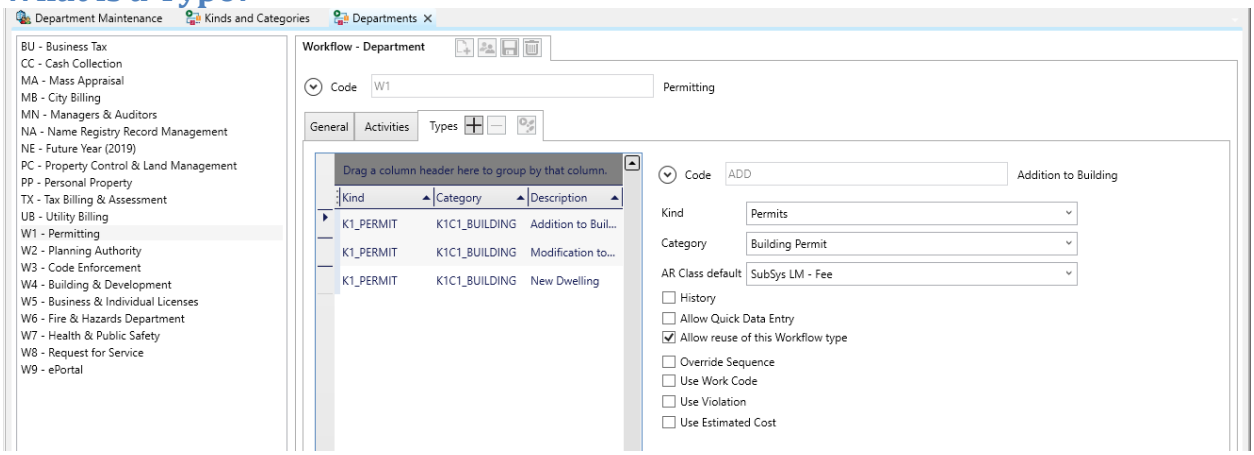
To open the **Workflow – Department** form in GNA…

1. On the GNA ribbon, select *Application Configurations (tab) > Workflow Management >* **Departments**

The Workflow Department form is presented in the center pane.



What is a Type?



The **Types** tab of the *Workflow – Department* form is used for creating Types that can be selected by the department

Accessing the Types List

When available, a list of existing types can be seen in the Workflow Department form. To access this form, in the GNA ribbon,

1. Select *Application Configuration (tab) > Workflow Management* > **Department**.
2. In the Workflow – Department form, if already existing, click to select a department from the list in left hand column.
3. You will note on the right hand side of the **Workflow – Department** form, three (3) sub tabs labelled *General*, *Activities*, and *Types*. Click the tab marked **Types**.
4. On the Types tab is a column that contains, when created, a list of types associated with this Department code.

The records listed under the *Types* tab are activity codes (TYPE_CODE) from (Table: **WM_PARM_TYPE**). These are the department codes that have been selected on the left hand pane.

Columns Displayed

The Types tab displays the following details regarding the Types:

NOTE: The grid content can be sorted by any of the headings, i.e. Kind, Category, or Description.

Kind – This is the classification of the type; for example in the instance of a Permit the Kind could be Building *Permit*, Electrical *Permit*, Plumbing *Permit*, and so on.

Generated Tables

When created, the Kind will generate a (Table: WM_KIND_<kind code>).

Category – The *Category* is a classification of the Kind. The Category will create a (Table: WM_CATEGORY_<category code>). If requested, each table will also generate respective required **Added Fields**.

Description – this information is taken from the Long Description field.

When an Activity is selected, the stored information associated with the activity is displayed. This information can be edited.

NOTE: When an Activity is created, a new record is created in (Table: **WM_PARM_ACTIVITY**). In addition, a record in (Table: **VT_USER**)
where `TABLE_NAME = 'WMACTIVITY'`
is created for the descriptions.

The CODE in (Table: VT_USER) will be the **Activity_ID** of the record from (Table: **WM_PARM_ACTIVITY**).

RULE: **Action**s can only be added after an Activity has be created.

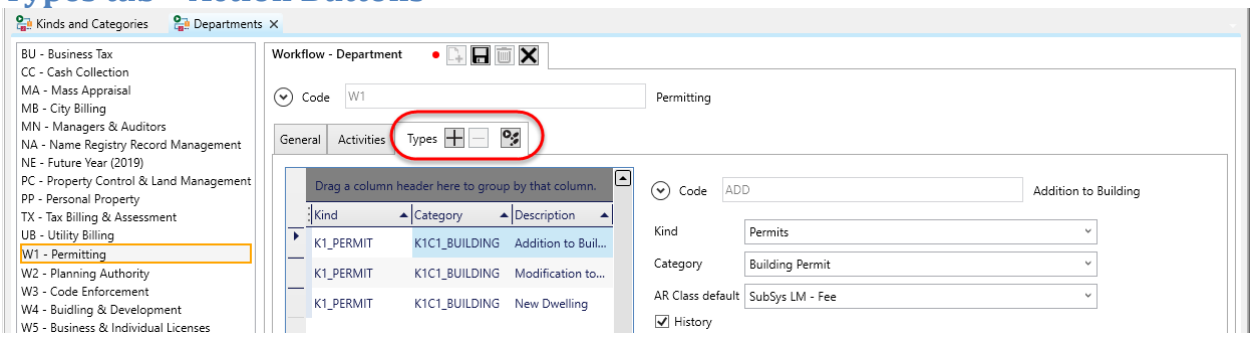
Types

Activities can perform different actions based upon the completion status of the activity. They are recorded by Department and Kind.

Types tab

The Types tab is linked to each type under the Types tab. When a base activity has been created, Actions can be added to it. To add an action to an activity...

Types tab – Action Buttons



Adding a Type

1. Click **Add** [+] to add create a new code, and add a new Kind and Category to the list. When creating a Type, these parameters are mandatory.

Deleting a Type

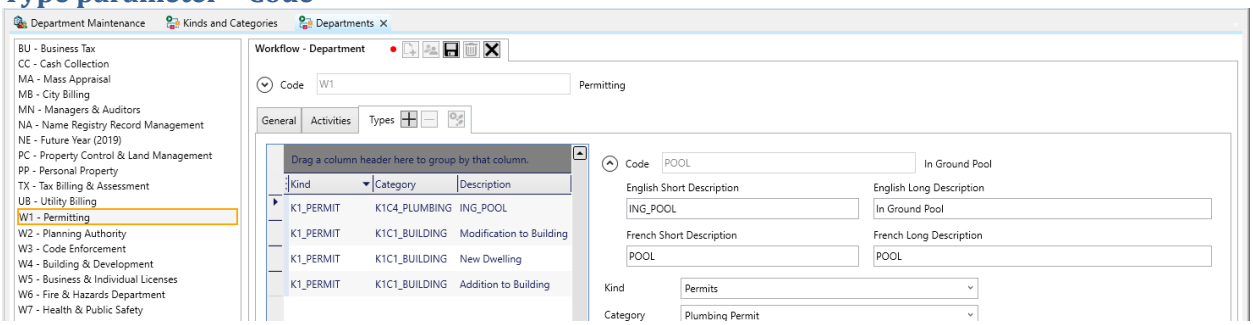
1. To delete a *Type*, click **Delete** [-], to delete a newly created *Type*.
1. Click to select the activity under the Activities tab.
2. On the right hand side is an Actions tab; click **Add Action** [+] to add a new action.

Creating an Type

Activities are created in the *Govern New Administrator* (**GNA**).

Type parameters

Type parameter – Code



Code – A new code may be created, or an existing one edited. This description is displayed for fast data entry and look-ups where space is limited on the forms. This parameter holds the **English Short Description**, the default name. There is an expand button on the left hand side of this parameter that will provide access to additional naming parameters. (Max. 15 alphanumeric code). The *Code* value is unique and entering a duplicate will display an error state.

NOTE: The following naming parameters are not required, but it is recommended as they can be useful in clarifying the meaning of the Code.

English Short Description – This field is automatically populated by the entry made in the **Code** field. This short description is displayed for fast data entry and look-ups where space is limited on forms.

English Long Description – Enter a long description. This is displayed on look-ups, forms and reports.

French Short Description – This is a second language short description that is displayed for fast data entry and look-ups where space is limited on forms.

French Long Description – Enter a second language long description. This is displayed on look-ups, forms and reports.

CONVERSION NOTE: *Govern for Windows* users that are performing conversions to *Govern for OpenForms* should note that *Departments* can have duplicates in *Kinds* and *Categories* but the same *Department* may not have a duplicate *Code*.

Kind – This is the classification of activity; for example in the instance of a Permit the Kind could be Building *Permit*, Electrical *Permit*, and so on. Note that when the Kind is changed, the Category list is updated and re-filtered. When the Kind is completely removed, any Category can be selected; when the category has been selected, the corresponding Kind is selected.

Category – This is a sub-classification of the Kind, e.g. for a Permit the category could be Building, Electrical, Plumbing, and so on. When no Kind has been selected, and only the category is selected, the corresponding Kind is selected.

AR Class default – Click to select the AR Class that will be associated with this record.

History – Select History to set the selected type to History mode.

Allow Quick Data Entry – Select this option to display the user-defined fields on a secondary screen when you select the type; only the field used in the fees calculation are displayed.

Allow reuse of this Workflow type (*Allow Multiple Type*) – this option will check to see if there are other workflows of the same type and allow their reuse.

NOTE: There are three options related to controlling the use of duplicate types; there are provisions to, **allow**/**prevent**, display a **warning**, and **block** additional types; their locations are listed as follows:

1. Workflow group > Departments > Workflow Department (tab) > Types (sub-tab) > **Allow reuse of this Workflow Type** – This option will **allow**/**prevent** the reuse of the current type as a duplicate type.

2. Workflow group > Departments > Workflow Department (tab) > General (sub-tab) > **Display a Warning for a duplicate Type** – Displays a Yes or No type **warning** to allow a duplicate type.

3. Workflow group > Kind and Categories > Workflow Kind (tab) > Categories tab > General (sub-tab) > **Allow Additional Types** – This option will, in general, allow additional types. This option will **block** the use of additional types.

Why Multiple Types?

There may be instances where there is a business requirement to either allow multiple types, or prevent the use of multiple types on a record. For example on a property, users may want to maintain a rule of a single family property on a parcel. Using a block will allow users to maintain this rule.

UI NOTE: The following parameters are collapsed by default. When the check box is selected, additional parameters will be displayed.

Type parameters – Override Sequence

When defining permit numbers by department, when generating Applications, Permits, Certificates (CO & CC), Offenses, Workflows, Payment and Submission sequence number, a custom prefix sequence or length may be entered. The following fields are used to customize your numeration.

Prefix – Enter an alphanumeric string that will be appended at the beginning of a numerical sequence; e.g. entering 'AMT' will result in a numerical sequence that is always presented as follows AMT001, or AMT1234, and so on. *Look under the **Preview** column to see a real-time example of your sequence.*

Sequence *(Start Number + 1)* – The value that is entered in this field will be incremented by 1. The resulting value is your starting sequence number; e.g. if 100 is entered, the next starting number is 101. *Look under the **Preview** column to see a real-time example of your sequence.*

Length – Enter the number of digits to use for the length of the sequence. This field will accept a numerical value from **1 – 12**. When a value is entered, the numerical portion of the sequence number will be "padded" with zero's from the left hand side.

Example **-** When the number entered in this **Length** field is "8", and no additional sequence numbers are entered, the starting number displayed under the preview will be **0000000**1.

Likewise, if "1000" is entered as a Start Number, and a **Length** of "8" is entered, the number that will be displayed will be **0000**1001

Preview – A preview of your sequence configuration is displayed under this column.

Application – This is the sequence format that will be applied to an Application number when it is generated.

Number – These parameters will modify the sequence format that will be applied to a generated Certificate number.

Certificate – Complete the parameters to modify the sequence format that will be applied to a Certificate number when it is generated.

Not Yet Implemented

Use Work Code –
Use Violation –
Use Estimated Cost –

APPENDIX

Tables

The following tables and related actions are implicated in the implementation of this feature.

Database Tables

(Table: **WM_PARM_TYPE**)

Column	Character	Details
DEPT	varchar(2)	Code from WM_DEPARTMENT
KIND	varchar(15)	
CATEGORY	varchar(15)	
TYPE_CODE	varchar(15)	
ENTRY_KEY_TYPE	varchar(15)	
AR_CLASS	varchar(15)	From AR_PARM_CLASS where SUB_SYSTEM = 'LM' (new WM?)
HISTORY	smallint	
QUICK_ENTRY	smallint	
NO_MULTIPLE	smallint	
OVERRIDESEQ	smallint	display the Appl, Permit, Number Override fields
and store in Usr_key_dynamics		
USE_WORKCODES	smallint	
USE_VIOLATIONS	smallint	
EST_COST_1	real	
EST_COST_2	real	
ESTCOST_EXP	varchar(15)	Logical Expression replaced by expression

Record added to…

(Table: **VT_USER_TABLES**)

Column	Description
TABLE_NAME	WM_TYPE
TABLE_TYPE	3
DESCRIPTION_EN	Workflow Types
DESCRIPTION_FR	----
BY_YEAR	0
BY_DEPT	-1
BY_JURISDICTION	0
SECURABLE	0
GENERATE_DB_VIEW	?
MAINTAIN_BY_SYSTEM	-1

Records created in USR_KEY_DYNAMICS for the Application, Number and Certificate Sequence numbers uses the same logic for Kind and Category.

(Table: USR_KEY_DYNAMICS)

KEY_NAME	KEY_VALUE	KEY_FORMAT
Application [TYPE:NEWRES]	1	NRA{0:D10}
Number [TYPE:NEWRES]	1	NRP{0:D10}
Certificate [TYPE:NEWRES]	1	NRC{0:D10}