Managing Fees

Overview

Use the Workflow Fee Method Editor to set up and maintain workflow fees. Fees are applied through actions, which can be added to a workflow status of activity step.

The following types of fees can be created:

- **Expressions**: Create expressions for flat fees or for fees that require a calculation. You can write an expression rather than using the formatted fee form for any fee that does not require a rate schedule.
- **Formatted**: The formatted fee form can be used in place of an expression for fees that are based on a calculation between two fields on a form, two added fields, a validation table, or a rate schedule. Rather than writing the expression, you select the parameters from drop-down lists.
- **Groups**: Create groups of fees if you want to execute multiple fees at the same time. All fees in the group are added together. The minimum, maximum, and rounding fee options can be applied to the group if all fee methods in the group are defined with the same A/R Class Code.

Prerequisites

Workflow Kind and Category

Fees are defined by category. Therefore, the Workflow Kind and Category must be created.

A/R Class Codes

A/R Class Codes are required for the workflow fees.

A/R Class Codes are created by year. Workflows are not year-based. For workflows that span multiple years, it is important that the A/R Class Codes exist in all years.

If Land Management is selected as the subsystem, all codes with the transaction type inv or empty are listed. For all other subsystems, all codes with the transaction types Fee (fee), Charge (chg), or Demand (dmd) are listed.

Business Rules

Deleting a Fee

If a fee is used anywhere in the system, it cannot be deleted.

Year Based Parameters

A/R Class Codes are defined by year. However, workflows are not year based.

If a fee method uses an A/R Class that is not available in all the years in which it is used, the A/R Class Code parameter is outlined in yellow on the Fee Method form.

Rounding, Minimum, and Maximum

The Fee Options: **Minimum**, **Maximum**, and **Rounding To** appear at the bottom of the Fee Method form for every **Fee Type**: Expression, Formatted, and Group.

Rounding is applied before the minimum or maximum values are compared.

The fee options are applied to a group fee only if all fee methods are defined with the same A/R Class Code.

If all fee methods have the same A/R Class Code, the fee options are applied as follows:

The fee options for each individual fee method are applied separately. Then, the fee methods are added together and the fee options defined for the group are applied. The following scenario illustrates how the maximum is applied to a group fee that contains two fee methods:

Fee Method	Fee ($)	Maximum ($)	Final Fee ($)
Fee Method A	300	200	200
Fee Method B	350	500	350
Group Fee	200 + 350 = 550	325	325

Creating Fees

Overview

Use the Workflow Fee Editor to create fees.

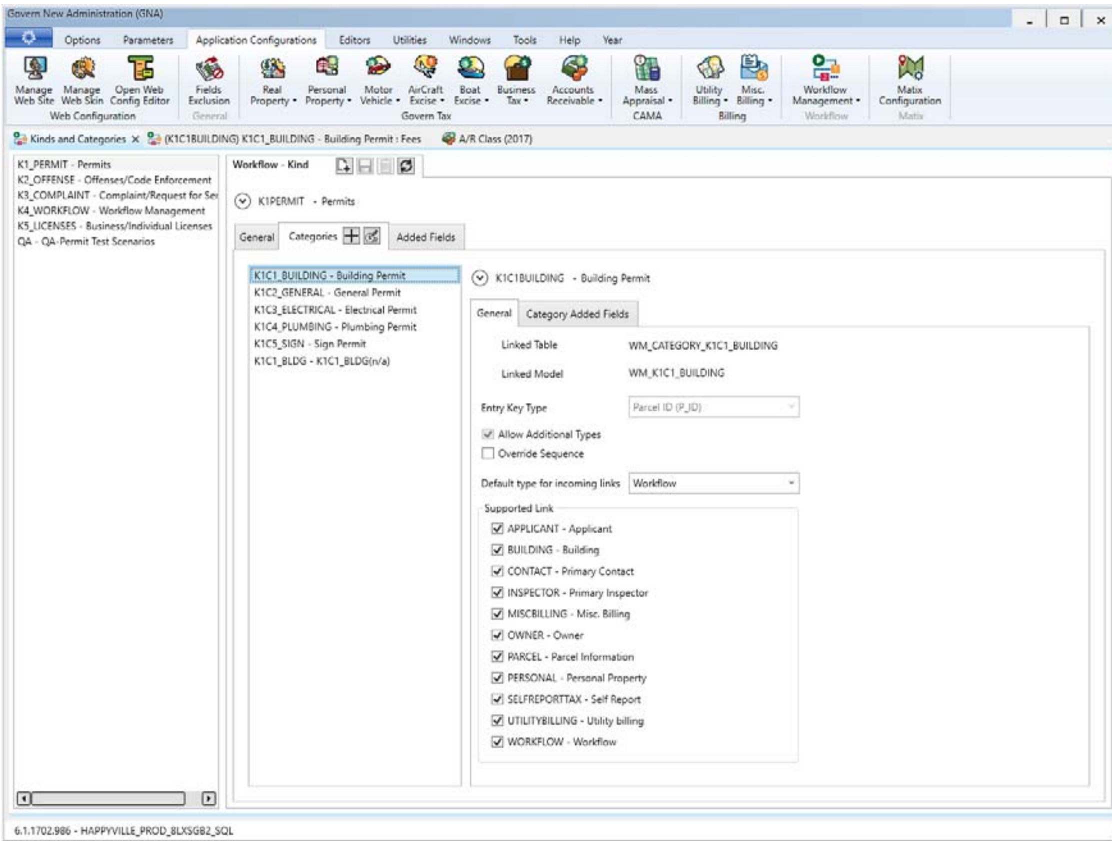
This page contains the following topics:

Accessing the Workflow Fee Method Editor

To access the Workflow Fee Method editor:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Kinds and Categories**.

   The Workflow Kinds are listed on the left.
3. Select a Workflow Kind.



4. Select the **Categories** tab.

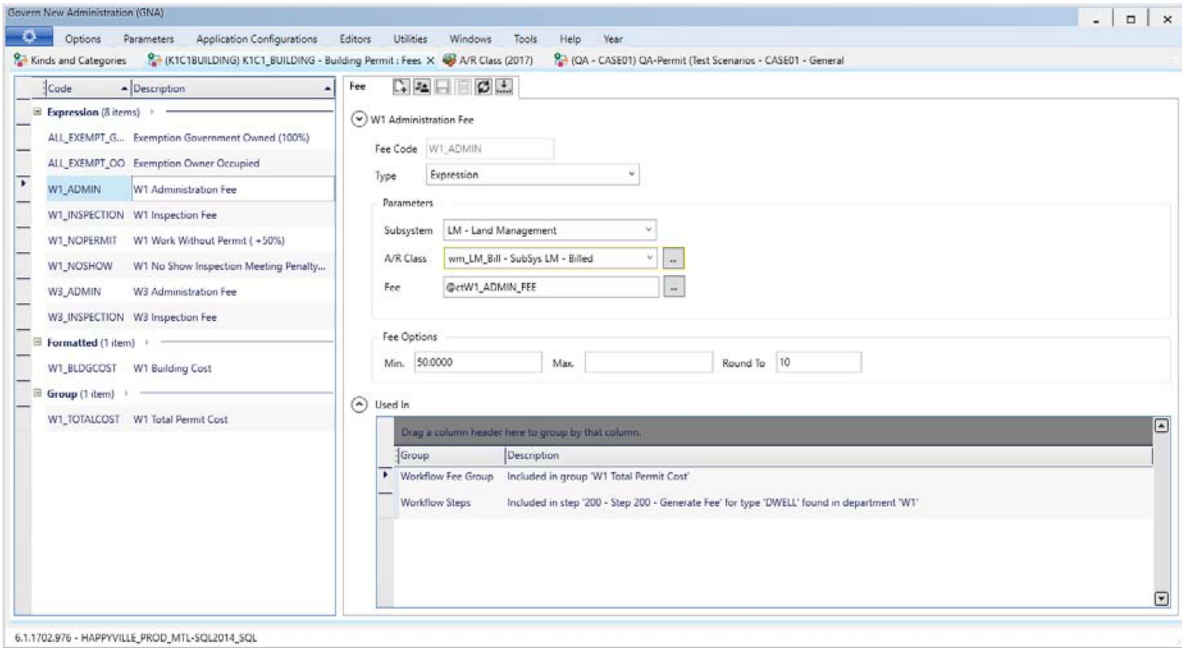
   The categories are listed in the tree view on the left.

5. Select a category.

6. Click the **Edit Fees** action button at the top of the form.

   > **Note:** The Edit Fees button is disabled if the fee has not been saved.

   The Fee Method Editor opens.



Existing workflow fees are listed on the left by **Type**: Expression, Formatted, and Group. The parameters for setting up the fee vary according to the type selected.

The fee options, **Minimum**, **Maximum**, and **Round To** can be applied to any type of fee. The **Used In** section at the bottom of the Fee Method form lists:

- The Group Type Fee methods that contain the selected fee
- The Activity Steps from which the selected fee is generated

Fee Method Icons

In addition to the standard New, Save, Delete, and Cancel icons, the Fee Method Editor has a Copy and an Import icon:

- **Copy**: If you need to create a new fee method that is similar to an existing one, you can use the copy icon. Then, make changes.

To copy a fee method:

1. Select the fee that you want to copy in the Fee Method editor.
2. Click the **Copy** icon  at the top of the form.

3. Modify the parameters that are different.

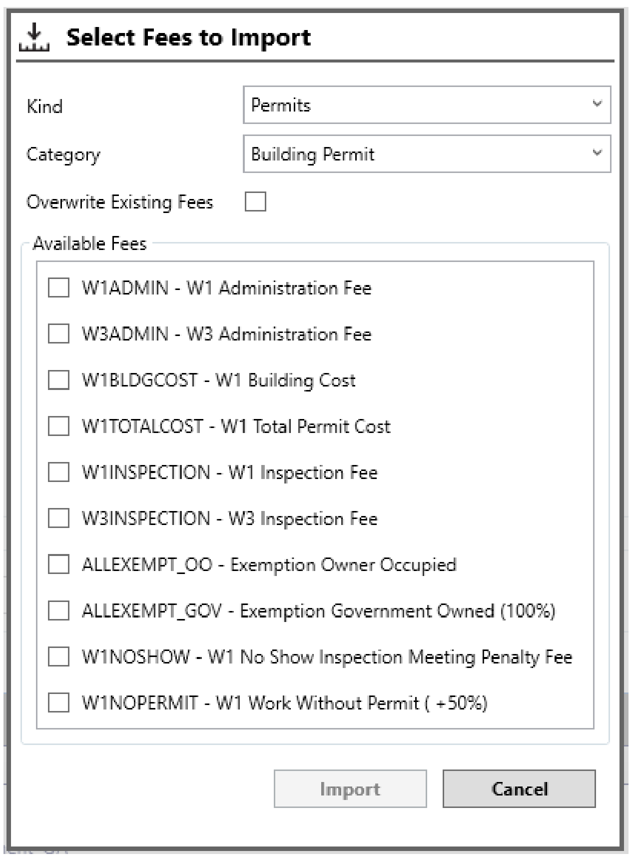
All parameters are copied, with the exception of the Fee Code, which must be unique.

- **Import**: You can import fee methods from one Kind and Category to another. You can also overwrite existing fees.

To import a fee method:

1. Click the **Import** icon at the top of the Fee Method form

   This opens the **Select Fees to Import** window.



2. Select a workflow kind from the **Kind** drop-down list.
3. Select a workflow category from the **Category** drop-down list

4. Select the **Overwrite Existing Fees** checkbox to overwrite the fees in the current Kind and Category that have the same name as the fee methods that you are importing.

   This can be useful if you modify a fee in one Kind and Category and want the same change in all Kinds and Categories.
5. Select the fees that you want to import from the **Available Fees** list.

   You can select multiple fees by holding down the [`Shift`] or [`Ctrl`] keys.
6. Click **Import**.

All parameters are imported including the Fee Code, which cannot be modified. You can modify any other parameter.

Note: There is no warning when you click **Import**.

Existing fee methods are overwritten if their Fee Codes are the same as the fees being imported.

Fee Method Parameters

This section covers the common parameters for all Fee Method types in the following sections:

• Defining the General Information for Fee Methods on page 8
• Defining Minimum, Maximum, and Rounding on page 9

Defining the General Information for Fee Methods

To complete the Fee Method Setup:

1. Enter a code to identify the fee in **Fee Code** parameter.

   The code can be a maximum of 15 characters and must be unique in the category.
2. Click the drop-down arrow to expand the description fields.
3. Enter descriptions in the **Short** and **Long Description** fields.
4. Select one of the following from the **Type** field and follow the corresponding instructions.
   - **Expression**: See Creating an Expression Type Fee on page 9.
   - **Formatted**: See Creating a Formatted Type Fee on page 13.

- **Group**: Creating a Group Type Fee on page 19

Defining Minimum, Maximum, and Rounding

The Minimum, Maximum, and Round To options are available for all Fee Methods types, Expression, Formatted, and Group. If they are applied at the group level, they apply to the sum of all fees in the group.

Round Fee To: Define a value for rounding the fees generated for a workflow. For example, enter **1** to round the fee to the nearest dollar, **10** to the nearest multiple of ten dollars or **100** to the nearest multiple of one hundred dollars. Bankers' rounding is applied.

Rounding occurs before the Minimum and Maximum Fees are applied.

Minimum Fee: Enter the minimum amount for the fee.

Maximum Fee: Enter the maximum amount for the fee.

Creating an Expression Type Fee

You can use an expression in order to create any fee. Expressions are particularly useful for flat fees and fee that use queries or constants.

This section covers the following topics:

Setting Up an Expression Type Fee

To create an expression to define a fee:

1. Open the Fee Method editor as described under Accessing the Workflow Fee Method Editor on page 4.
2. Enter a code to identify the fee in **Fee Code** parameter.

   The code can be a maximum of 15 characters and must be unique in the category.
3. Click the drop-down arrow to expand the description fields.
4. Enter descriptions in the **Short** and **Long Description** fields.

5. Select **Expression** from the **Type** drop-down list:
6. Select the subsystem from the **Subsystem** parameter.

   All applicable A/R Class Codes are listed. This varies according to the subsystem selected as described under A/R Class Codes on page 2.
7. Select an A/R Class Code from the A/R Class drop-down list.

   > **Note:** All A/R Class Codes for the selected subsystem are listed for all years
   >
   > However, if you select an A/R Class Code that does not exist in the current year, the A/R Class parameter is outlined in yellow.
   >
   > Ensure that the A/R Class Codes you are using exists in all years for which constants are created.

   Click the ellipsis button to open the A/R Class Code editor and create a new A/R Class Code.
8. Click the ellipsis button in the **Expression** parameter.

   This opens the Expression Selector.
9. Create the expression.

   > **Note:** Only the attributes that are in the business model are available and can be used in the expression.
   > *For details on expressions, refer to the OpenForms Designer documentation.*

10. Click **Save**.

Using a Constant in a Fee

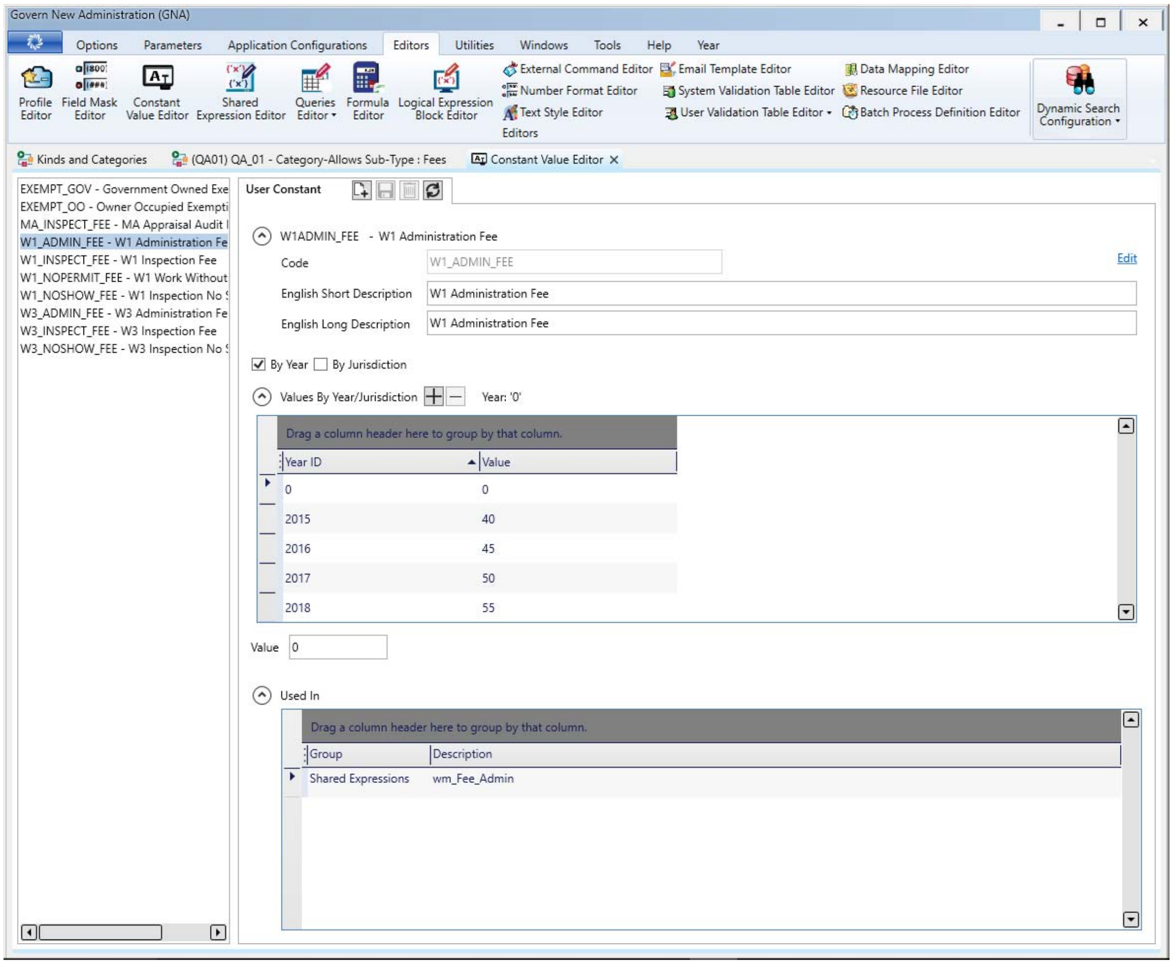
Constants are useful for setting up fees that include a parameter that changes only when the year or jurisdiction changes.

Prerequisites

For this type of fee, the first step is to create the constant.

To create a constant for a workflow fee:

1. Launch GNA.
2. Select **Editors** > **Constant Editor**.



3. Click the **New** icon to create a new constant.
4. Enter text to uniquely identify the constant in the **Code** parameter.
5. Add descriptions in the **Short** and **Long Description** parameters.
6. Do one the following:
   - Select **By Year** if the value of the constant changes from year to year.
   - Select **By Jurisdiction** if the value changes from one jurisdiction to another.
   - Select both **By Year** and **By Jurisdiction** if the value changes by both.
7. Click the **Add** icon (+) to add a new value.
8. Select the jurisdiction in the **Jurisdiction** parameter if applicable.
9. Enter the year in the **Year** parameter if applicable.

10. Enter the value in the **Value** parameter.
11. Repeat steps **7** to **10** as required.
12. Click **Save**.

For further details, see http://product.govern.harrisgovern.com/103-ED-003.

A/R Class Codes

Ensure that the A/R Class Code you are using exists in all the years for which you have created constants.

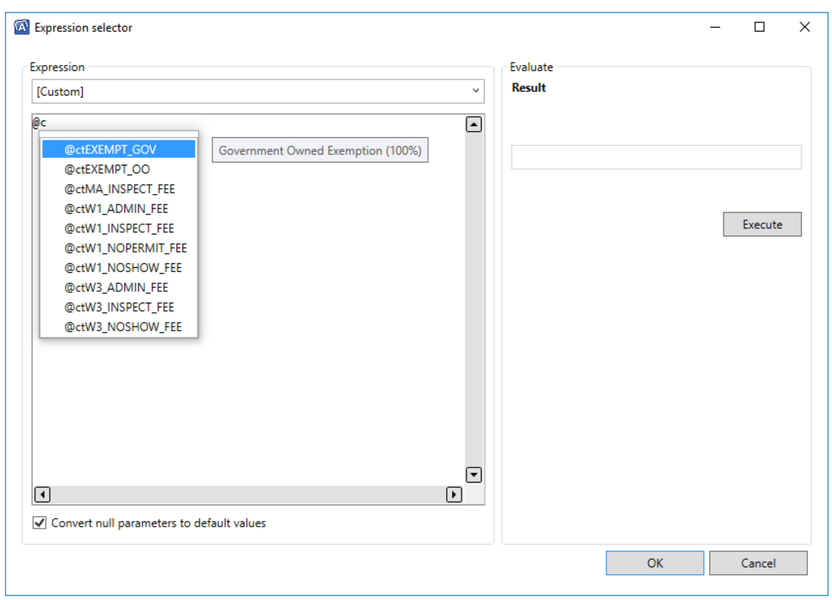
Adding a Constant to a Fee

To set up a fee code that uses a constant:

1. Follow the procedure under Creating an Expression Type Fee on page 9, with the following exception.
2. When you create the expression for the fee, enter:

```
@ct
```

A drop-down list of all the constants in the system appears.

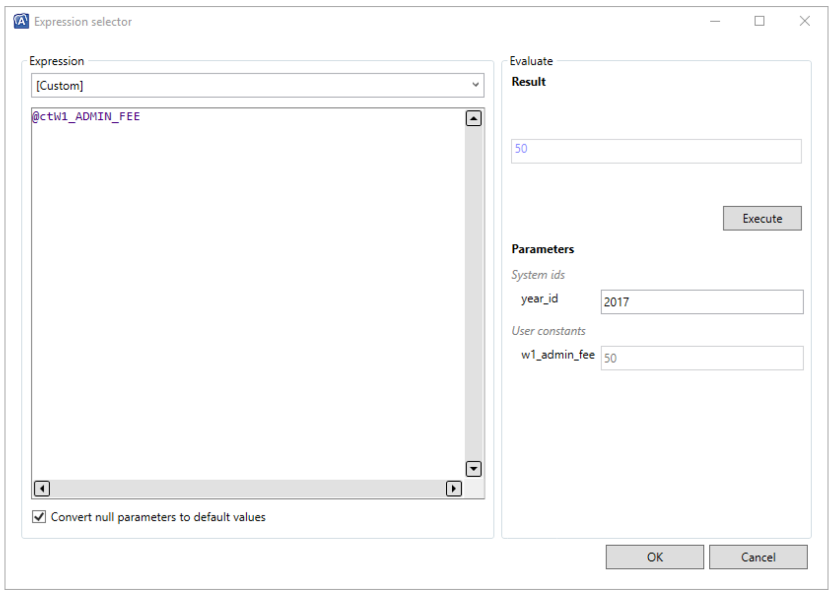


3. Select the constant from the drop-down list.

A parameter with the **Year ID** and/or **Jurisdiction ID** appears on the editor, depending on how you set up the constant.

4. If the constant is year-based, enter the year in the **Year_ID** parameter.
5. Click **Execute**.

   The value associated with the year is displayed in the **Result** field.



6. Click **OK** on the Expression Editor.
7. Click **Save** on the **Fee** form.

Creating a Formatted Type Fee

The formatted type Fee Method Editor contains options for using the fields in the selected Workflow Kind and Category:

- In a calculation
- To access the codes in a validation table:
- To create a fee schedule

These are described in the following sections:

- Defining a Formatted Fee on page 14
- Creating a Formatted Fee with the Apply Rate Option on page 16
- Creating a Formatted Fee with the Rate / Unit Option on page 17

- Creating a Formatted Fee with a Lookup on page 18

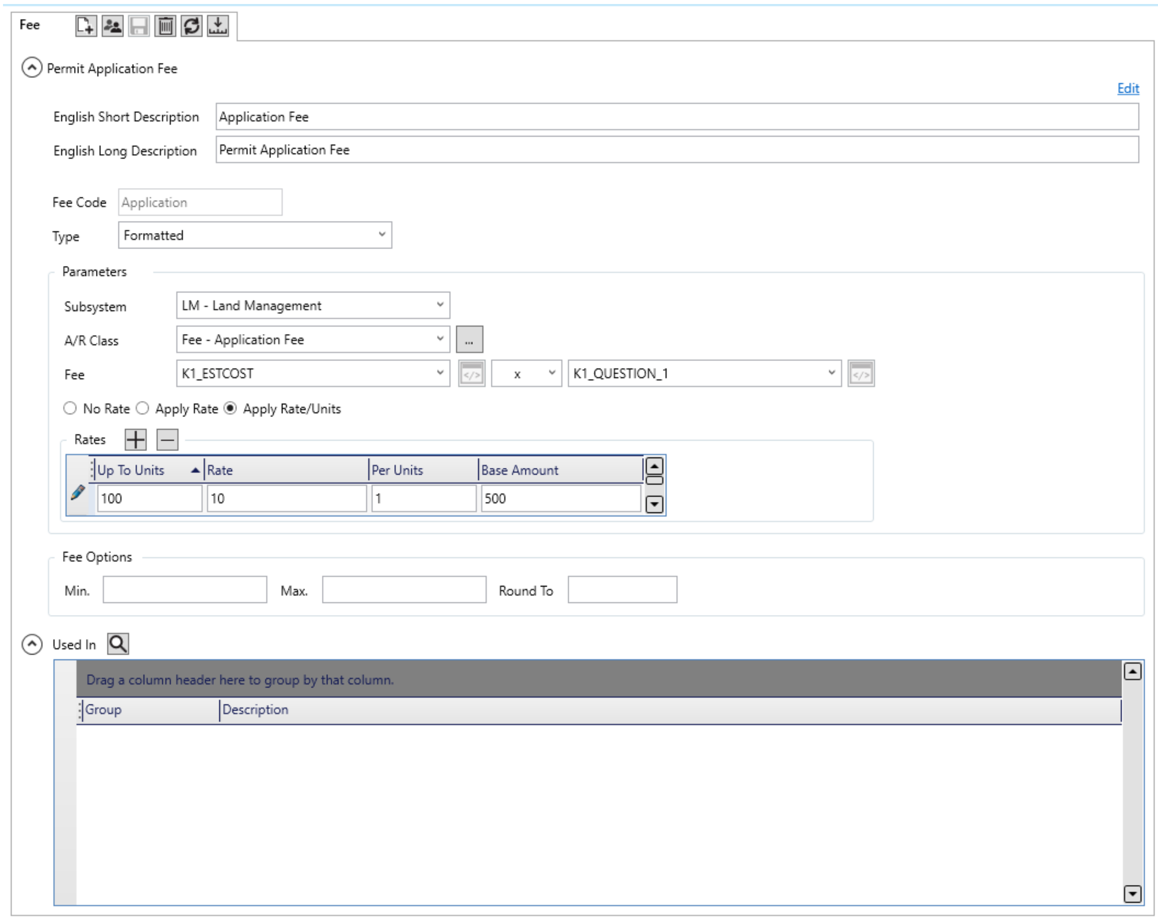
Defining a Formatted Fee

To define a formatted fee:

1. Open the Fee Method editor for the required workflow Kind and Category.
2. Enter a code to identify the fee in **Fee Code** parameter.

   The code can be a maximum of 15 characters and must be unique in the category.
3. Click the drop-down arrow to expand the description fields.
4. Enter descriptions in the **Short** and **Long Description** fields.
5. Select **Formatted** from the **Type** drop-down list:

   The Formatted Fee parameters appear.



6. Select the subsystem from the **Subsystem** parameter.

   All A/R Class Codes for the subsystem and the year are listed. For more information, see A/R Class Codes on page 2.

7. Select an A/R Class Code from the **A/R Class** drop-down list.

   Note: All A/R Class Codes for the selected subsystem are listed for all years

   However, if you select an A/R Class Code that does not exist in the current year, the A/R Class parameter is outlined in yellow.

8. Click the ellipsis button to open the A/R Class Code editor and create a new A/R Class Code if required.

A formatted fee can be based on a single attribute or on two attributes with an operator. All numeric and lookup attributes in the business model are listed in the drop-down lists for the fee.

The attributes can be a numeric type of lookup.

If you select an attribute that has a lookup, the validation table icon is enabled and a secondary window opens.

Only numeric values can be entered.

9. Select the first attribute for the calculation for from the first drop-down list beside the **Fee** parameter.
10. Select an operator if you adding a second attribute, + - * ÷

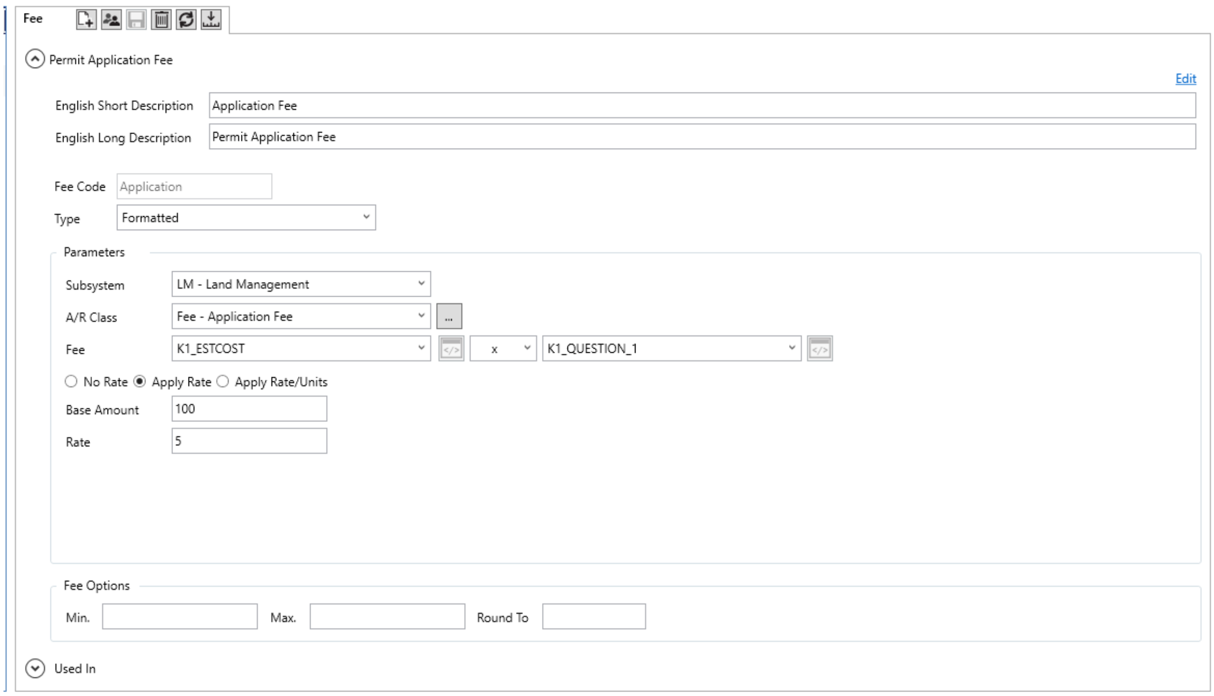
    The second attribute is required if you enter an operator.
11. Select the second attribute.
12. Select one of the following and follow the corresponding procedure.
    - No Rate
    - Apply Rate
    - Apply Rate / Units
13. Click **Save**.

Creating a Formatted Fee with the Apply Rate Option

For this type of fee, you need to provide the Base Amount and the Rate.

To create a formatted fee with the Apply Rate option:

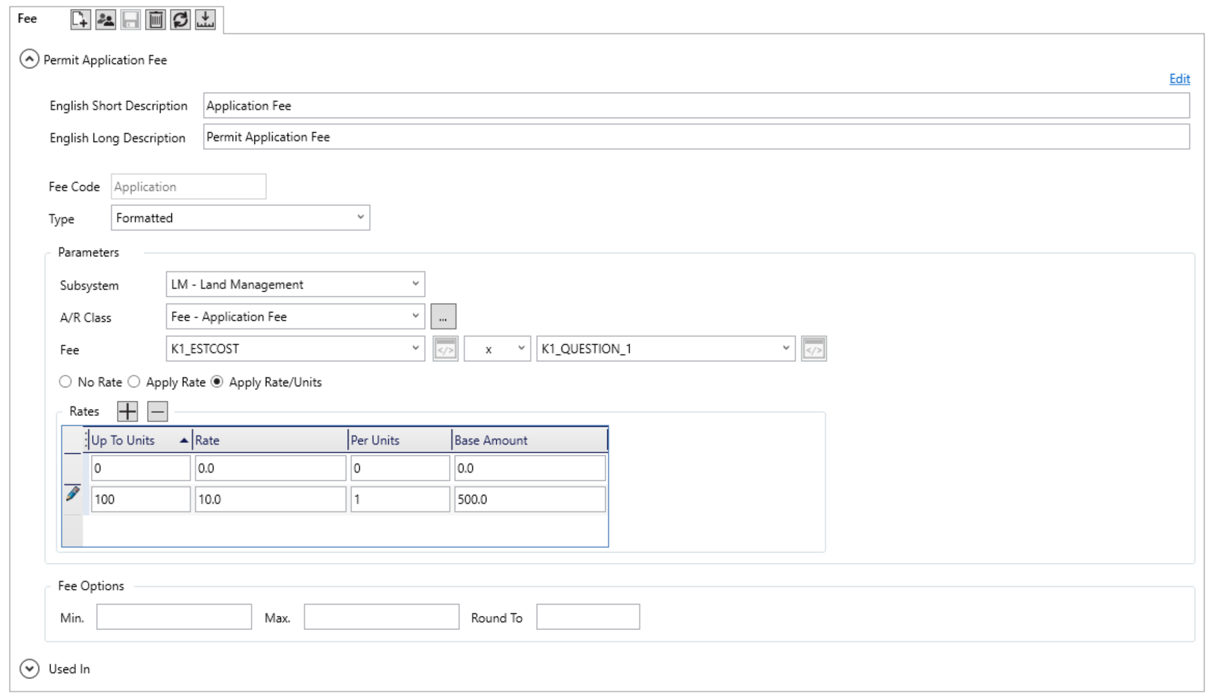
1. Click the **Apply Rate** option on the Formatted Fee form.



2. Enter amounts in the Base Amount and the Rate parameters.

Creating a Formatted Fee with the Rate / Unit Option

For this type of fee, you need to provide the Base Amount and the Rate. An Up to units rate can be used only once.



3. Click the plus (+) symbol beside Rate to add a new rate.
4. Enter the maximum number of units to which the rate applies in the Up to Units field.
5. Enter the rate for the number of units.
6. Enter the number of units to which the rate applies in the **Per Units** column.
7. Click **Save**.

Creating a Formatted Fee with a Lookup

You can create a formatted type fee for a fee that is based on a validation table. The validation table must be associated with a field on the workflow form. Values are assigned to the validation codes on the Fee Method form.

This is illustrated in the Sample Scenario at the end of this document. In the following scenario, a fee method is used to generate a permit fee that varies according to property use. It is higher for commercial properties. See Formatted Type Fee With Lookup on page 36.

Prerequisites

The first step is to create the Validation Table and Codes. These are saved in GNA, under **Editors** > **User Validation Table Editor** > **Permits**.

The workflow form must include a field that is associated with the validation table lookup.

Defining the Formatted Fee with Lookup

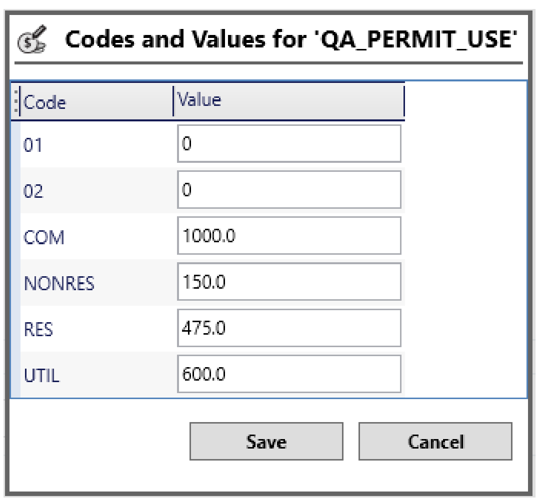
To define the fee:

1. Follow the procedure under Defining a Formatted Fee on page 14 with the following exception.
2. Select the validation table from the first **Fee** drop-down list.

   This list contains all the fields on the form.

3. Click the **Codes and Values** icon . between the two **Fee** parameters.

   This opens the **Codes and Values** form.



Codes and Values for 'QA_PERMIT_USE'

Code	Value
01	0
02	0
COM	1000.0
NONRES	150.0
RES	475.0
UTIL	600.0

Save Cancel

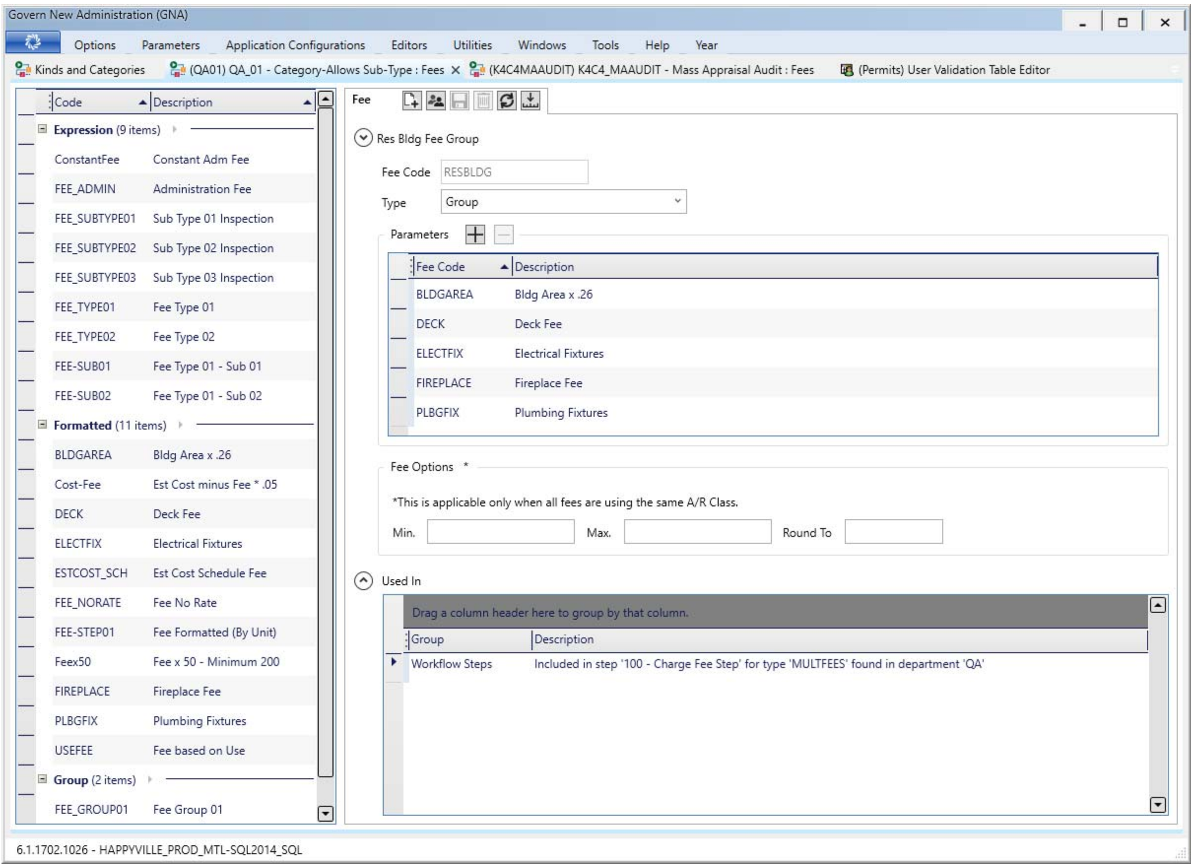
4. Enter the required value for each code.
5. Click **Save**.

Creating a Group Type Fee

The Group Type fee is used for fees grouping a number of fee together so that they can be generated at the same time from an action.

To create a group fee:

1. Follow steps 1 to 3 under Creating Fees on page 4.
2. Select Group in the **Type** parameter.



3. Click the plus (+) icon next to parameters to add a fee to the group.

   A secondary window opens.
4. Repeat step 3 to add more fees to the group.
5. Enter values in the **Min.**, **Max.**, and **Round To** parameters if required.

   These values apply to the sum of all the fees in the group.
6. Click **Save**.

Adding a Fee to a Workflow

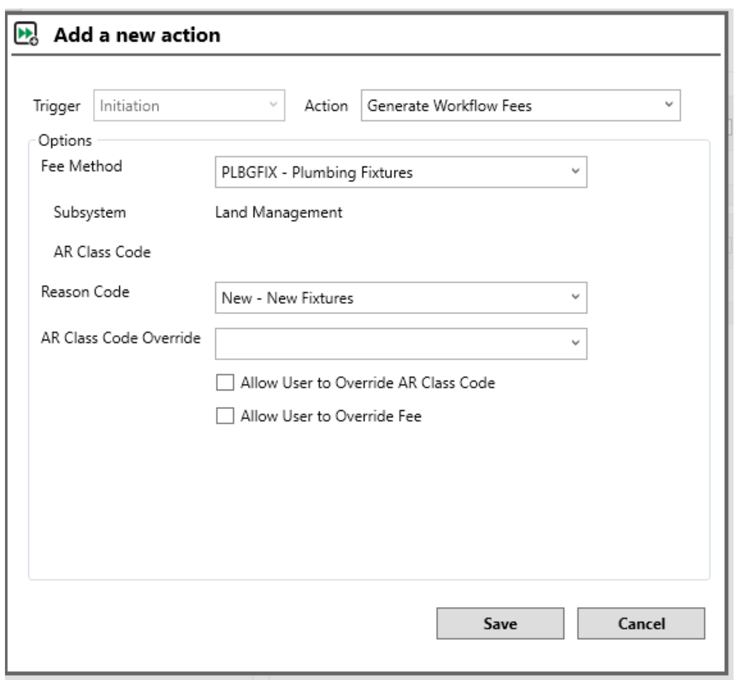
Fees are added to workflows at the Activity Steps.

To add a fee to a workflow:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Departments**.
3. Select the step at which you want to add the fee.
4. Select one of the following:
   - At Initialization
   - At Status
   - At Step

   This opens the **Add a new action** form.

   The **Trigger** parameter is automatically populated.



5. Select **Generate Workflow Fee** from the **Action** drop-down list.
6. Select a fee from the **Fee Method** drop-down list.
7. The **Subsystem** parameter is automatically populated.

8. Select a reason for charging the fee from the **Reason Code** drop-down list.

   This is an optional field.

9. Select an **A/R Class Code** from the A/R override parameter if users can over the selected A/R Class.

10. Select the following options:
    - Allow User to Override A/R Class Code.
    - Allow User to Override Fee.

11. Click **Save**.

Sample Scenarios

Overview

This section describes various scenarios for charging fees. They are based on fee methods that an organization would typically use for adding a fee to a workflow. For each scenario, all steps are described. These include:

- Defining the prerequisites, such as lookup validation tables and codes, expressions, constants, and added fields.
- Creating the fee
- Adding the fee to a workflow
- Viewing the amount charged in A/R

The scenarios illustrate the use of the various fee types. They include:

- Expression Type Fee Using Constants on page 24
- Formatted Type Fee With Lookup on page 36
- Formatted Type Fee With Added Fields on page 52
- Formatted Type Fee with Schedule on page 66
- Group Fee on page 76

Expression Type Fee Using Constants

Overview

In this scenario, a constant is added to a fee method. Adding constants is useful for fees that include amounts that change from year to year or jurisdiction to jurisdiction.

In this case, the Administration Fee increases by five dollars every year. The organization needs to maintain fees for multiple years in order to accommodate permits that span across two or more years.

As in all Govern OpenForms modules, the expression can be simple or complex. It could include multiple parameters and calculations in addition to the constant. However, in this scenario, it is based on the constant only.

The following steps are described:

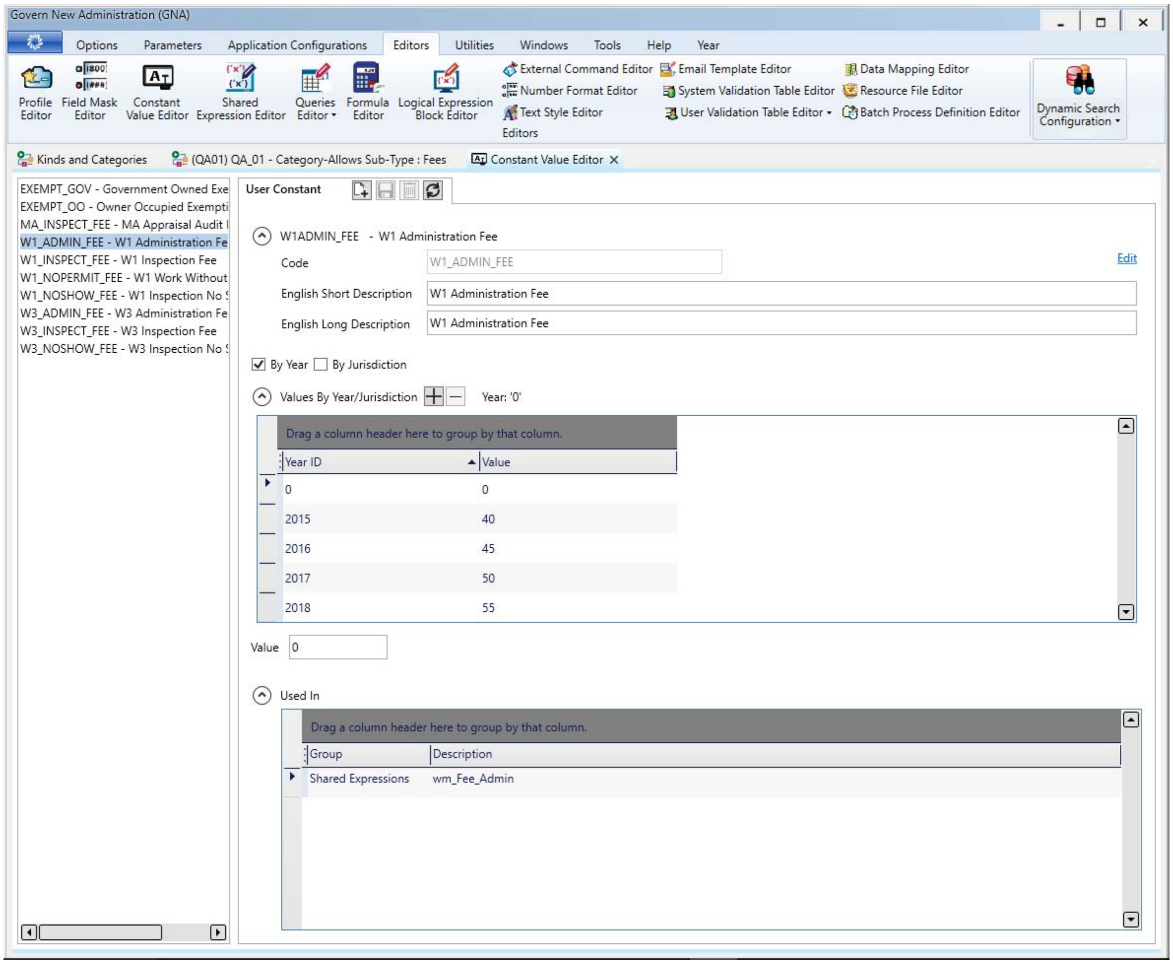
- Create the Constant
- Add the Fee to a Workflow
- Start the Workflow
- View the Fee in A/R Inquiry

Create the Constant

In this scenario, a new year-based constant called Administration Fee is created in the Constant Editor.

To create the Administration Fee constant:

1. Launch GNA.
2. Select **Editors** > **Constant Editor**.



3. Click the **New** icon to create a new constant.
4. Enter W1_ADMIN_FEE in the **Code** parameter. to uniquely identify the constant
5. Enter W1 Administration Fee in the **Short** and **Long Description** parameters.
6. Select **By Year** to define constants that change on a yearly basis.
7. Click the **Add** icon (+) to create new entries:
8. Enter the following:

Year ID	Value
2015	**40**
2016	**45**
2017	**50**
2018	**55**

9. Click **Save**.

Add the Constant to a New Fee

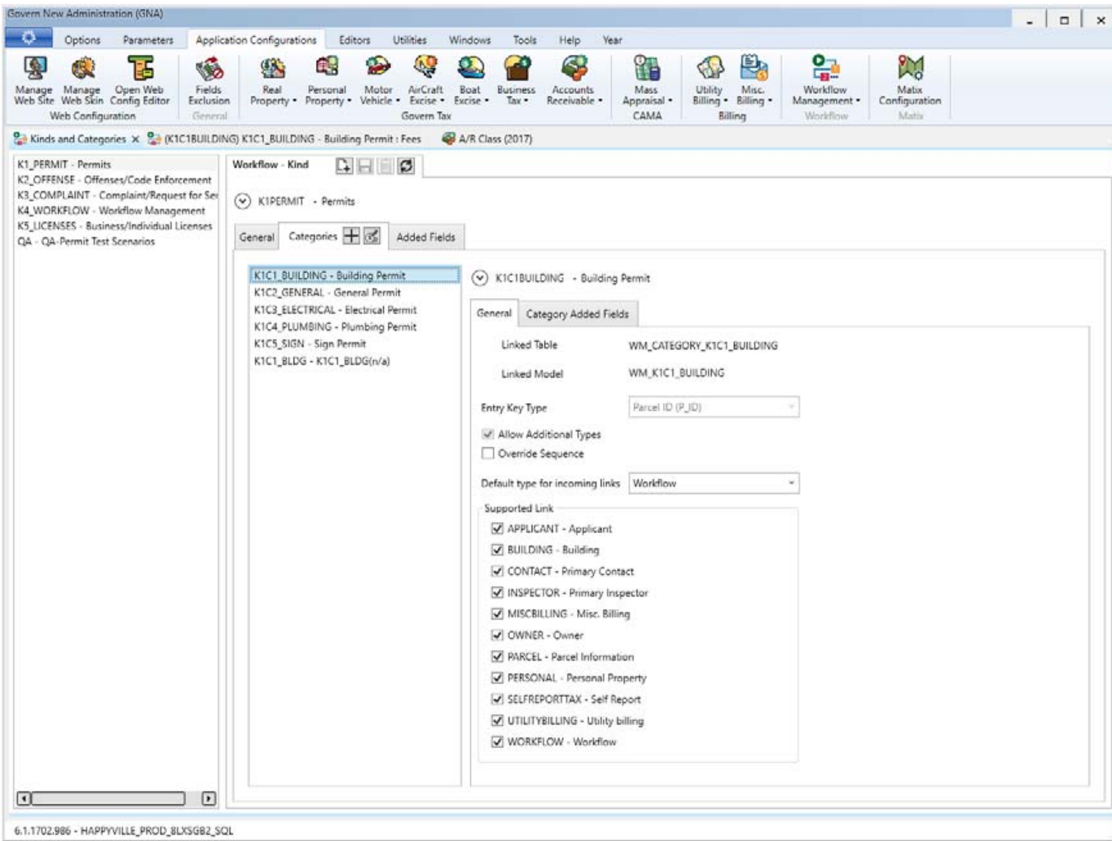
This procedure is divided into the following steps:

- Accessing the Fee Method Form
- Creating the New Fee Method with the Constant
- Testing the New Fee Method

Accessing the Fee Method Form

To access the fee method form:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Kinds and Categories**.

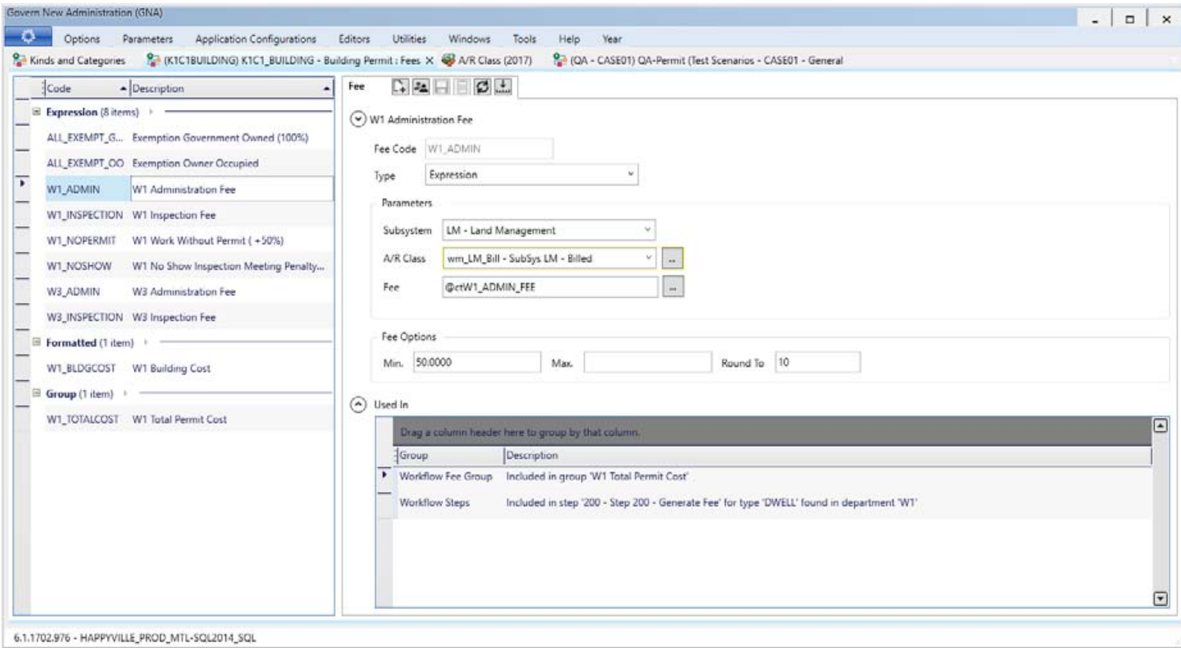


All existing Kinds are listed in the tree view on the left.

3. Select **QA - QA-Permit Test Scenarios**.
4. Select the **Categories** tab.

   The categories are listed in the tree view on the left.
5. Select the **QA_01 - Category-Allows Sub-Type**.
6. Click the **Edit Fees** action button at the top of the form.

   The Fee Method Editor opens.



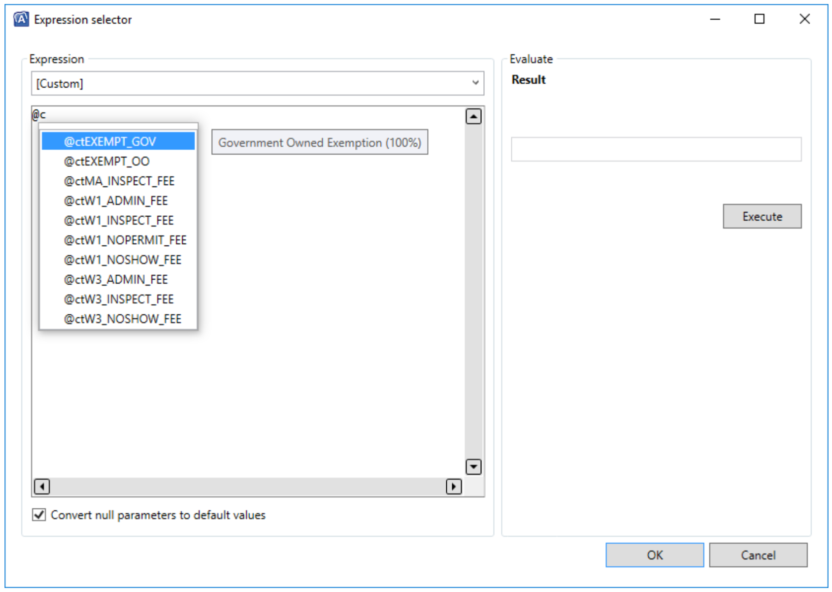
Existing workflow fees are listed on the left by Type: Expression, Formatted, and Group.

Creating the New Fee Method and Adding a Constant

To create the new fee method with constant used in this scenario:

1. Enter **ConstantFee** in **Fee Code** parameter to uniquely identify the fee.
2. Click the drop-down arrow to expand the description fields.
3. Enter **Constant Adm Fee** in the **English Short** and **Long Description** fields.
4. Select **Expression** from the **Type** drop-down list.
5. Select **LM - Land Management** from the **Subsystem** drop-down list.
6. Select **wm_LM_Bill - SubSys LM - Billed** from the **A/R Class** drop-down list
7. Click the ellipsis button in the **Fee** field to open the Expression Editor. and enter:

```
@ctW1_ADMIN_FEE
```



Click **OK** on the Expression Selector.

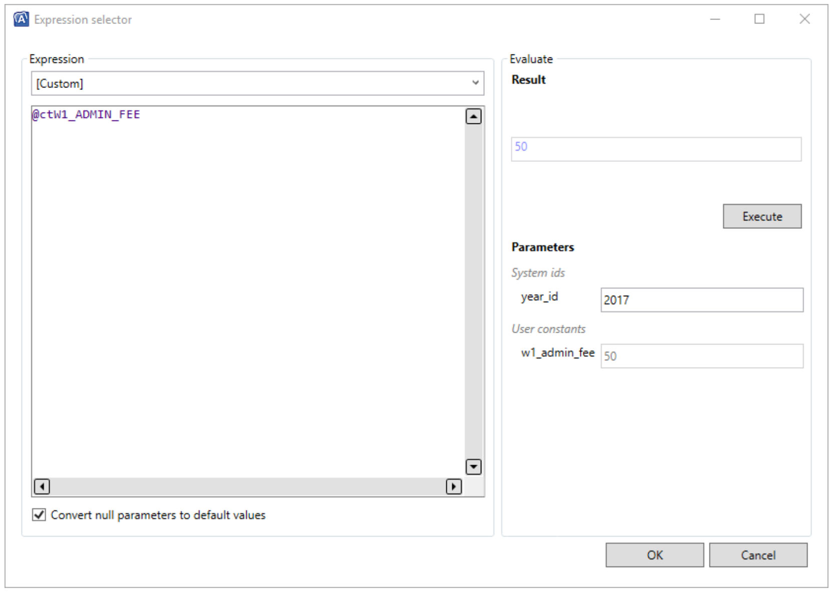
Testing the Constant for the Fee Method

To test the fee method with constant:

1. Open the expression selector for the constant.

   A parameter with the **Year ID** appears on the editor.
2. Enter the **2017** in the **Year_ID** parameter.
3. Click **Execute**.

   The value **50** appears in the **Result** field and in the **w1_admin_fee** field.



4. Click **OK** on the Expression Editor.
5. Click **Save** on the **Fee** form.

Add the Fee to a Workflow

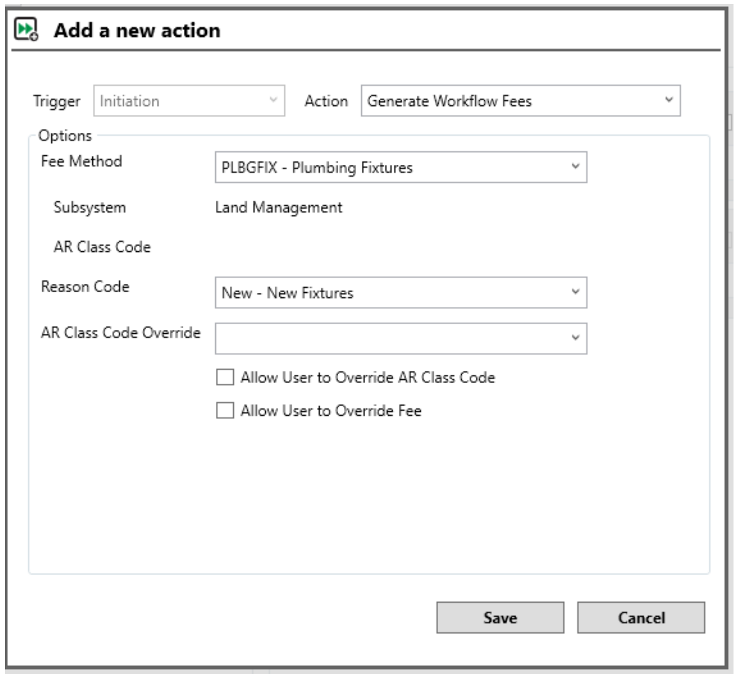
Fees are added to workflows on the Activity Steps.

To add a fee to a workflow:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Departments**.
3. Select **QA - QA-Permit (Test Scenarios)**.
4. Click the **Step** icon.
5. Select **100 - Fee Step**.
6. Select the + icon to add a status.
7. Select **True** from the drop-down list and enter **999** in the **Go to** field.

   This opens the **Add a new action** form.

   The **Trigger** parameter is automatically populated.



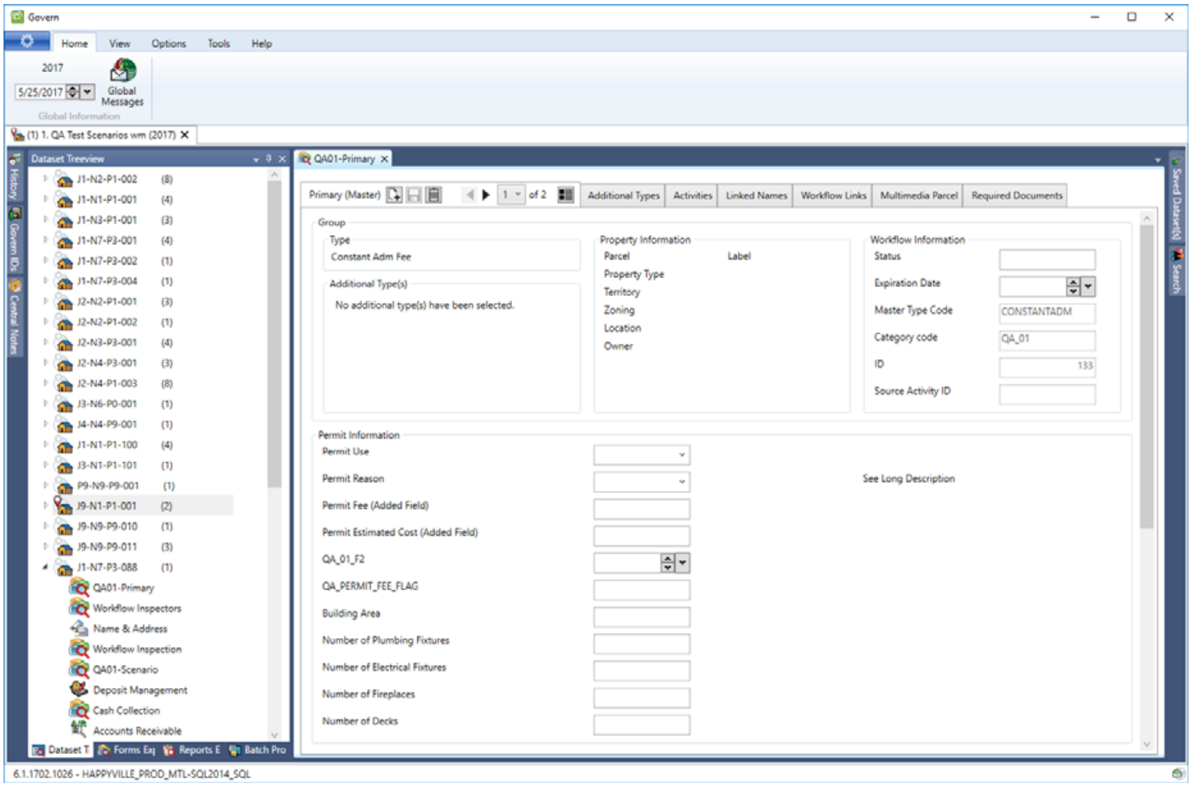
8. Select **Generate Workflow Fee** from the **Action** drop-down list.
9. Select **FEE_TYPE01 - Fee Type 01** from the **Fee Method** drop-down list.
10. The **Subsystem** parameter is automatically populated.
11. Select **02 - A/R Reason 02** from the **Reason Code** drop-down list.

    This is an optional field.
12. Select **wm_L2_Bill - SubSys L2 - Billed** from the **A/R override** parameter if users can over the selected A/R Class.
13. Select **Allow User to Override Fee**.
14. Click **Save** on the **Edit action** window.
15. Click **Save** on the **Activity Setup** window.

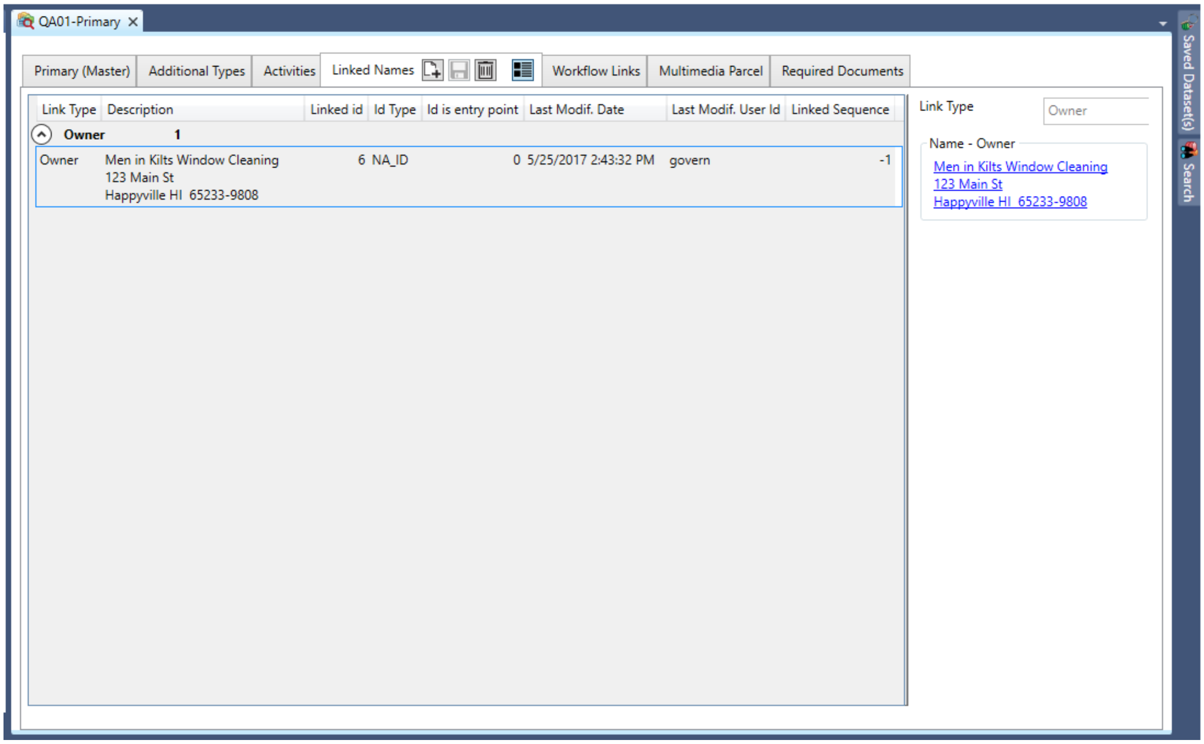
Start the Workflow

To test the fee in a workflow:

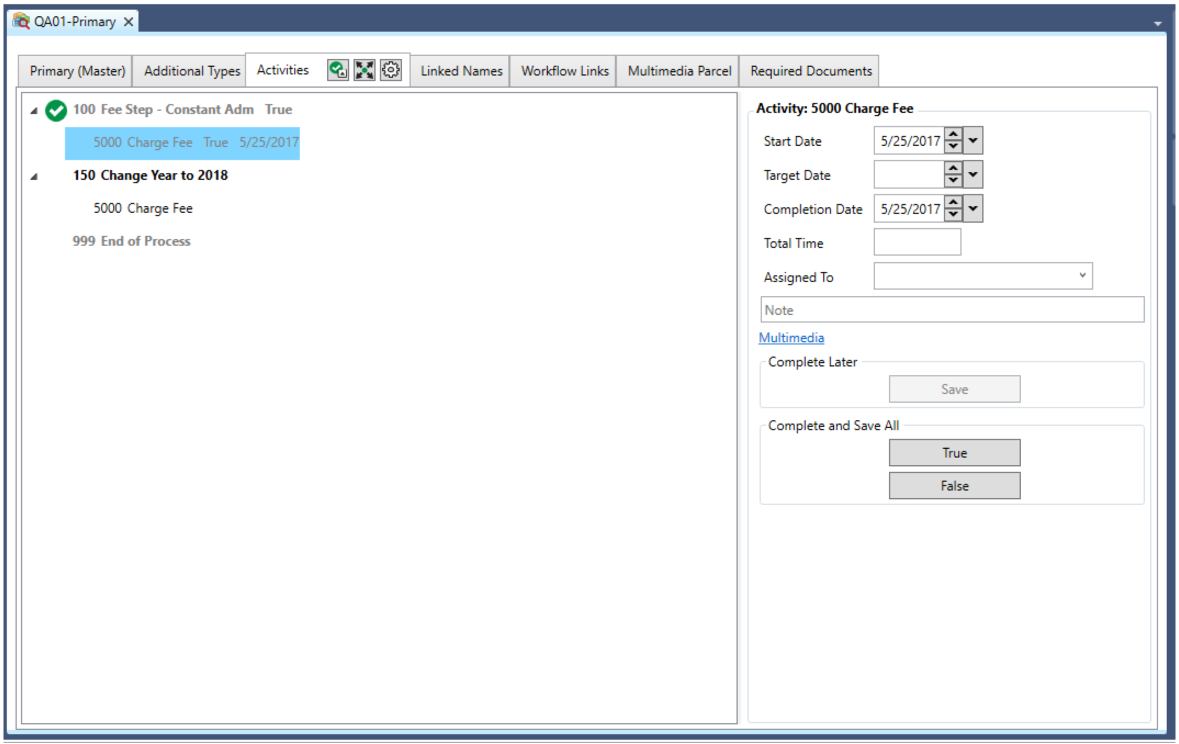
1. Launch Govern.
2. Open the **QA - Test Scenarios - wm Profile**.
3. Open the **Primary (Master)** form.



4. Perform a search for a property record and add the results to the tree view
5. .Set the year to **2017**.
6. Click **New** to create a new workflow record.
7. Select **Constant Adm Fee** from the Type drop-down list.
8. Click **Save**.
9. Select the **Linked Names** tab.



10. Click **New**.
11. Select **Owner** from the **Link Type** drop-down list.
12. Select the name showing under **Suggested Links**.
13. Select the **Activities** tab.



14. Click **True** beside the first step.

    A fee of **$50.00** is charged.

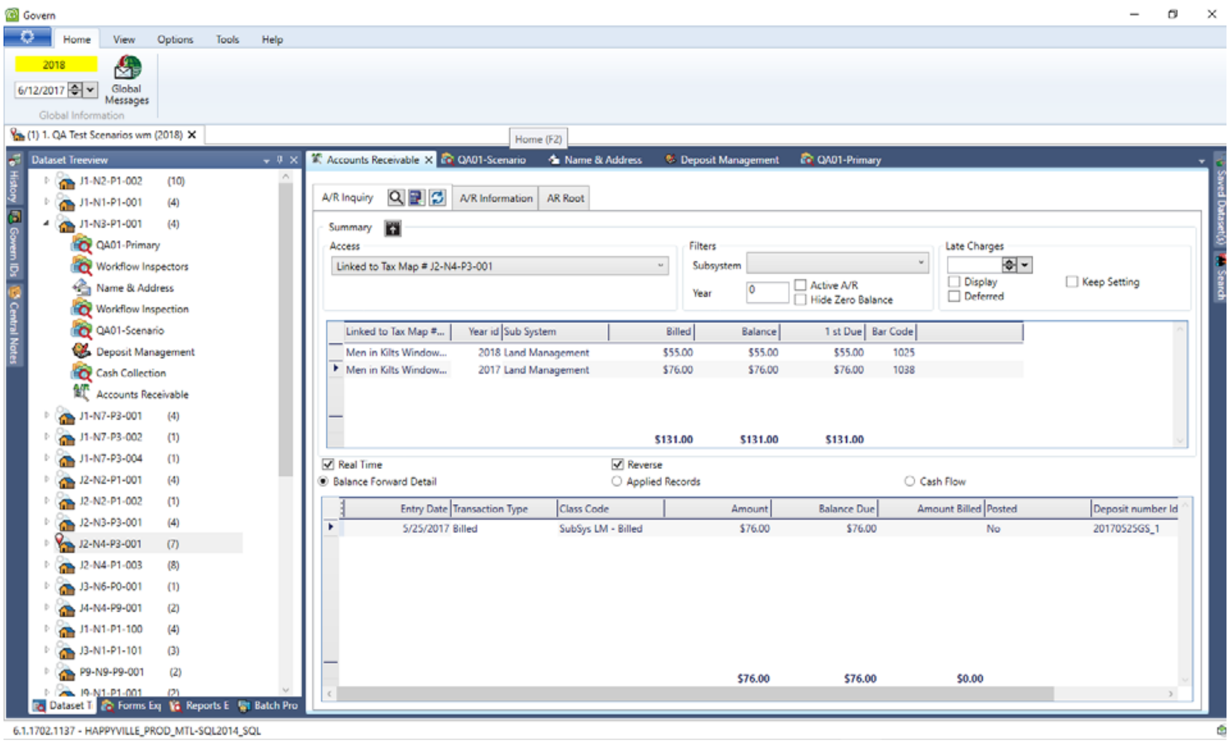
15. Change the year to **2018**.
16. Select the **Activities** tab.
17. Click **True** beside the first step.

    A fee of **$55.00** is charged.

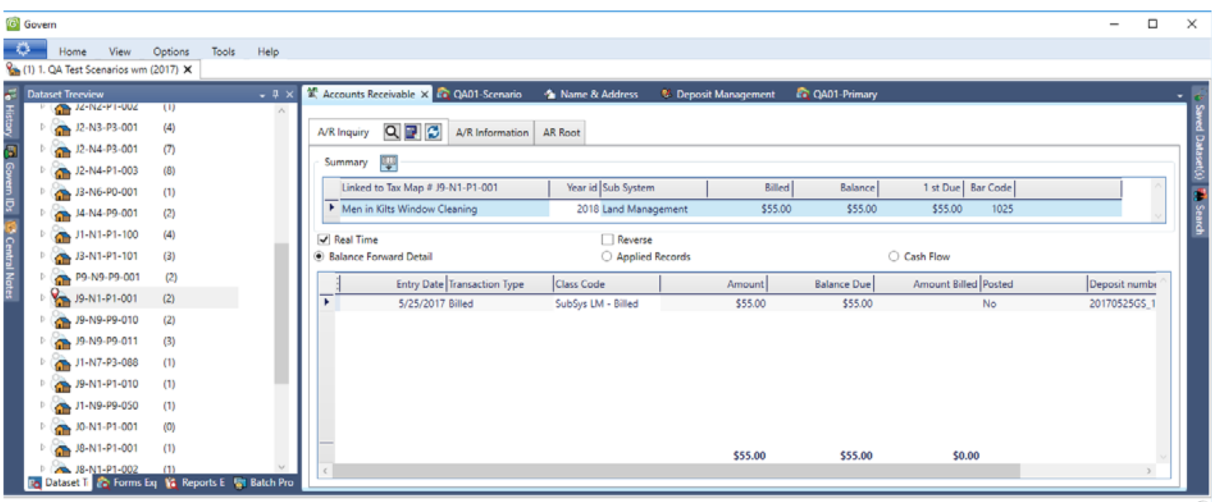
Viewing the Fee in A/R Inquiry

To view the fee in A/R Inquiry:

1. Open the A/R Inquiry form for the parcel.
2. Select the Linked to current tax map number in the Summary section.



3. Select the record that you want to view by year ID.



The detail of the record is displayed.

Formatted Type Fee With Lookup

Overview

In this scenario, a fee is automatically generated from a workflow. The fee varies according to the property use selected:

- Residential
- Commercial
- Non-residential
- Utilities

In order to set up values for this fee, the property uses are defined in a validation table.

The values for the validation table are entered on the Fee Method form.

Finally, the fee method is added to an activity step. It is charged when the step is completed, according to the property use that the user selects for the workflow.

The setup and execution of this fee are described under the following headings:

- Create the Validation Table
- Link the validation table to a field on the form
- Create the fee
- Add the Fee to a Workflow
- Launch the Workflow

Create the Validation Table

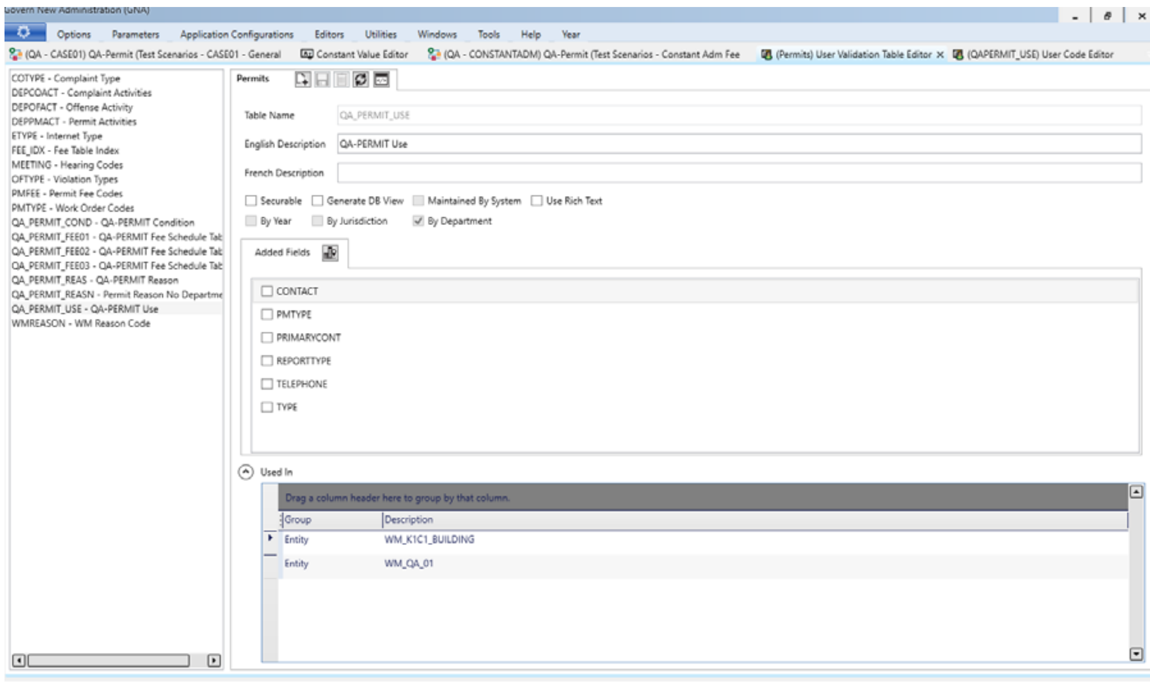
Prerequisite

The first step is to create the Validation Table. In this scenario, the QA_PERMIT_USE table is used.

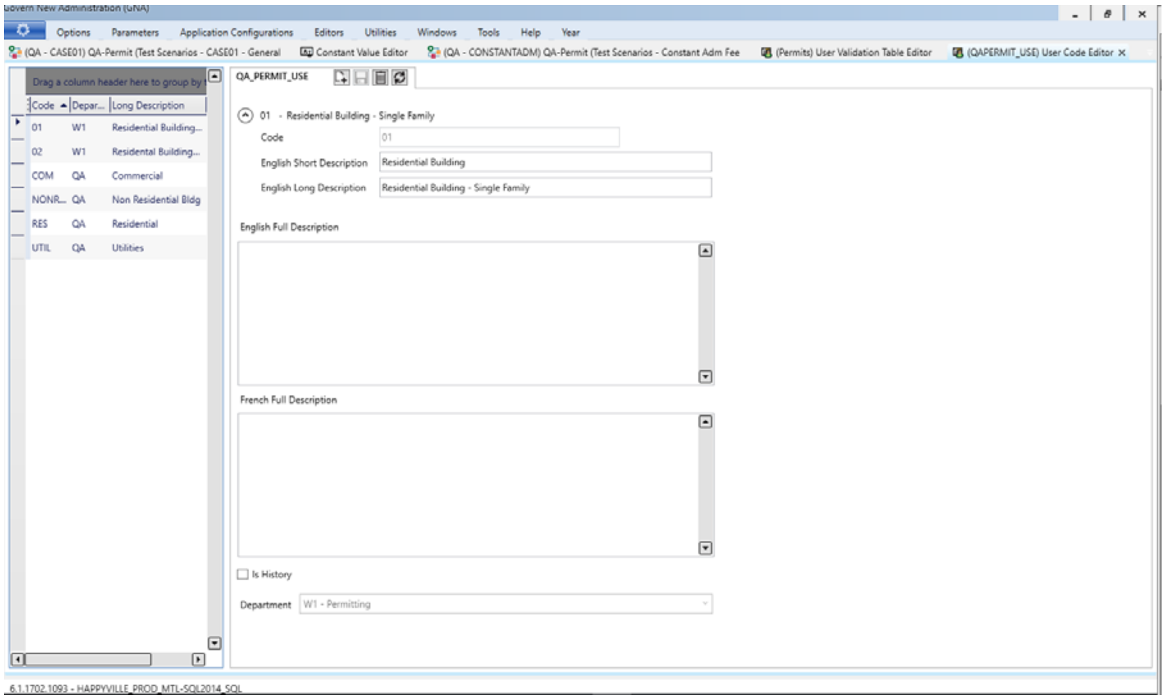
To create this table:

1. Launch GNA.
2. Select **Editors** > **User Validation Table Editor** > **Permits**.

3. Click **New** to create a new table.
4. Enter **QA_PERMIT_USE** in the **Table Name** parameter.



5. Enter **QA-PERMIT Use** in the **English Description** parameter.
6. Select **By Department**.
7. Click the **Codes** icon to create the validation codes for the table.



8. Click the **New** icon to create new codes.
9. Enter **COM** in the **Code** parameter to uniquely identify the validation code.
10. Enter **Commercial** in the **Short** and **Long Description** fields.
11. Select **QA - QA Permit (Test Scenarios)** from the **Department** drop-down list.
12. Repeat steps **8** to **11** to create codes for **Residential Building**, **Residential**, and **Utilities** in the same department.
13. Click **Save**.

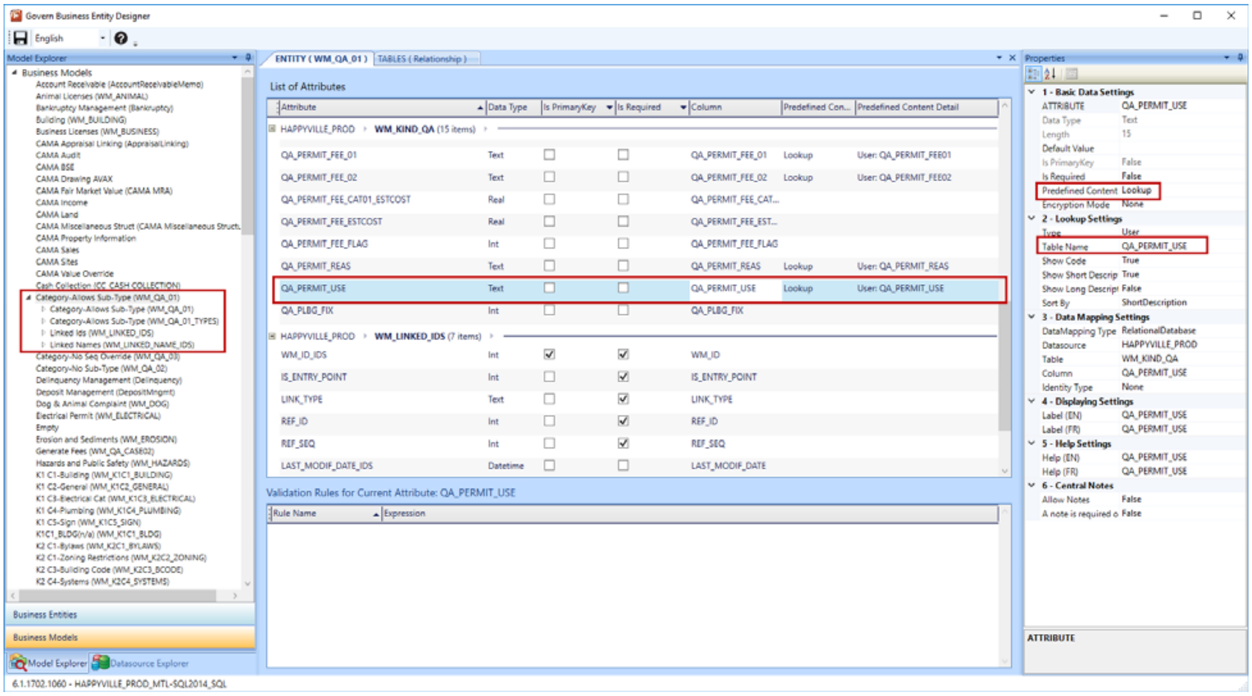
For more information about Validation Tables and Codes, see http://product.govern.harrisgovern.com/103-ED-010

Add the Validation Table to a Field on a Form

To add the validation table to a field on a form:

1. Launch the Business Entity Designer (BED).
2. Select the **Business Models** explorer.
3. Select the **Category - Allows Sub-Type (WM_QA_01)** model.

4. Double-click on the **WM_QA_01** business entity to open it.



5. Select **Lookup** from the **Predefined Content** parameter.
6. Select **QA_PERMIT_USE** in the **Lookup Settings** parameter.
7. Click **Save**.

Create a New Fee that uses the Validation Table

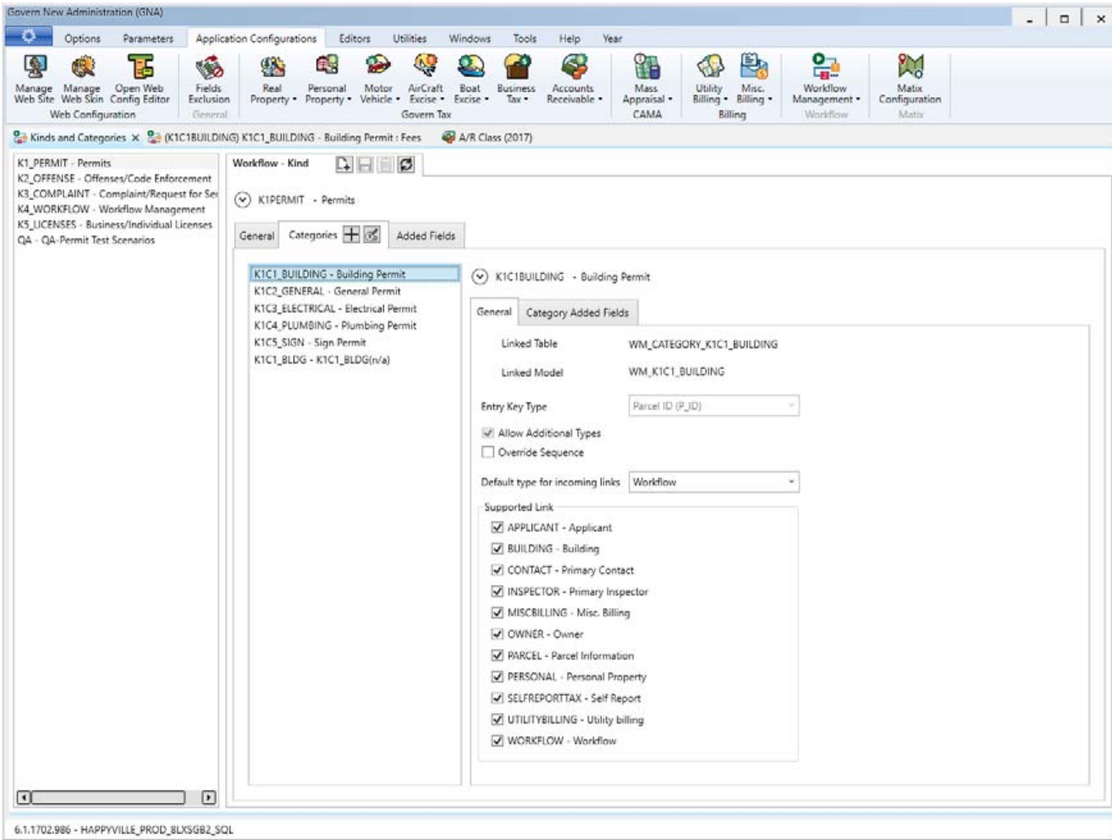
This procedure is divided into the following steps:

- Accessing the Fee Method Form
- Creating the New Fee Method with the Validation Table

Accessing the Fee Method Form

To access the fee method form:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Kinds and Categories**.



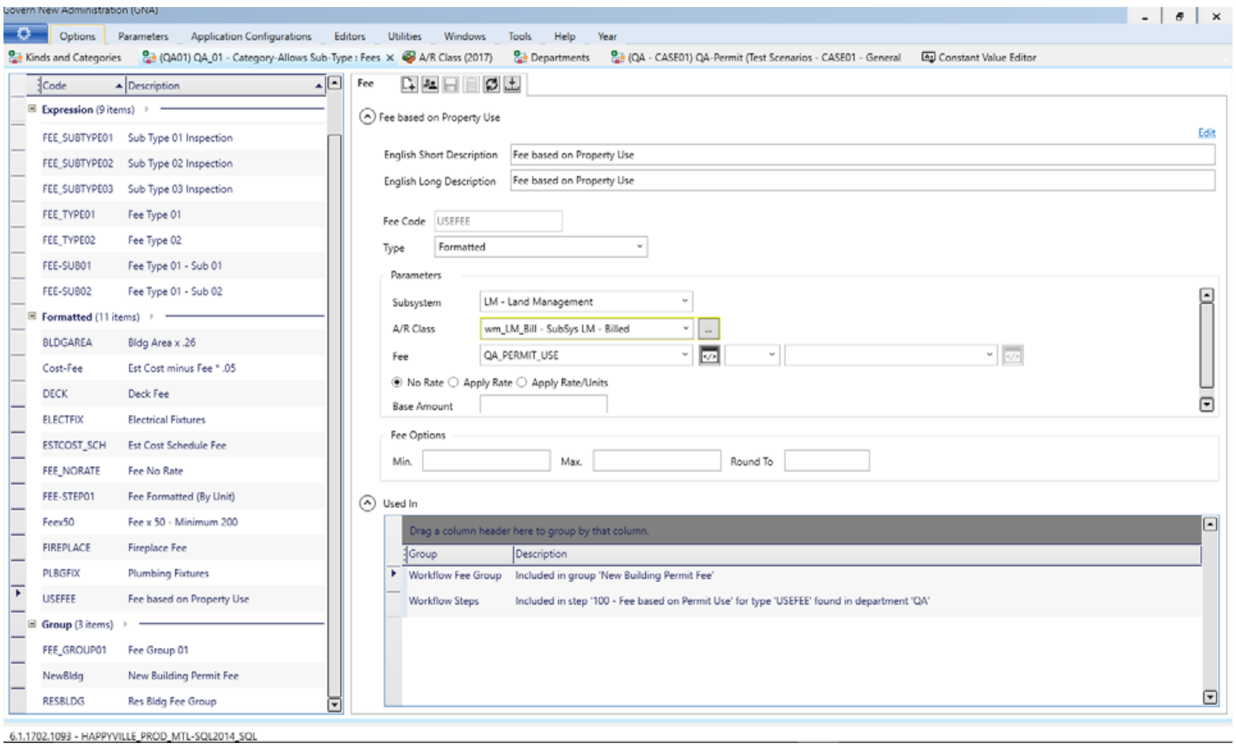
All existing Kinds are listed in the tree view on the left.

3. Select **QA - QA-Permit Test Scenarios**.
4. Select the **Categories** tab.

   The categories are listed in the tree view on the left.

5. Select the **QA_01 - Category-Allows Sub-Type**.
6. Click the **Edit Fees** action button at the top of the form.

   The Fee Method Editor opens.

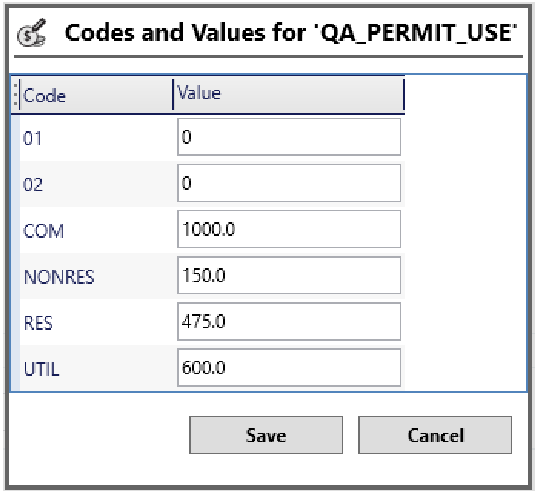


Creating the New Formatted Fee with the Validation Table

To create the new fee method with the validation table:

1. Enter **USEFEE** in the **Fee Code** parameter.
2. Click the drop-down arrow to expand the description fields.
3. Enter **Fee Based on Property Use** in the **English Short** and **Long Description** fields.
4. Select **Formatted** from the **Type** drop-down list.
5. Enter **LM - Land Management** in the **Subsystem** parameter.
6. Select **wm_LM_Bill - Subsys FM - Billed** in the **A/R Class** parameter.
7. Select **QA_PERMIT_USE** from the first **Fee** drop-down list.
8. Click the **Codes and Values** icon .

   This opens the **Codes and Values** form.

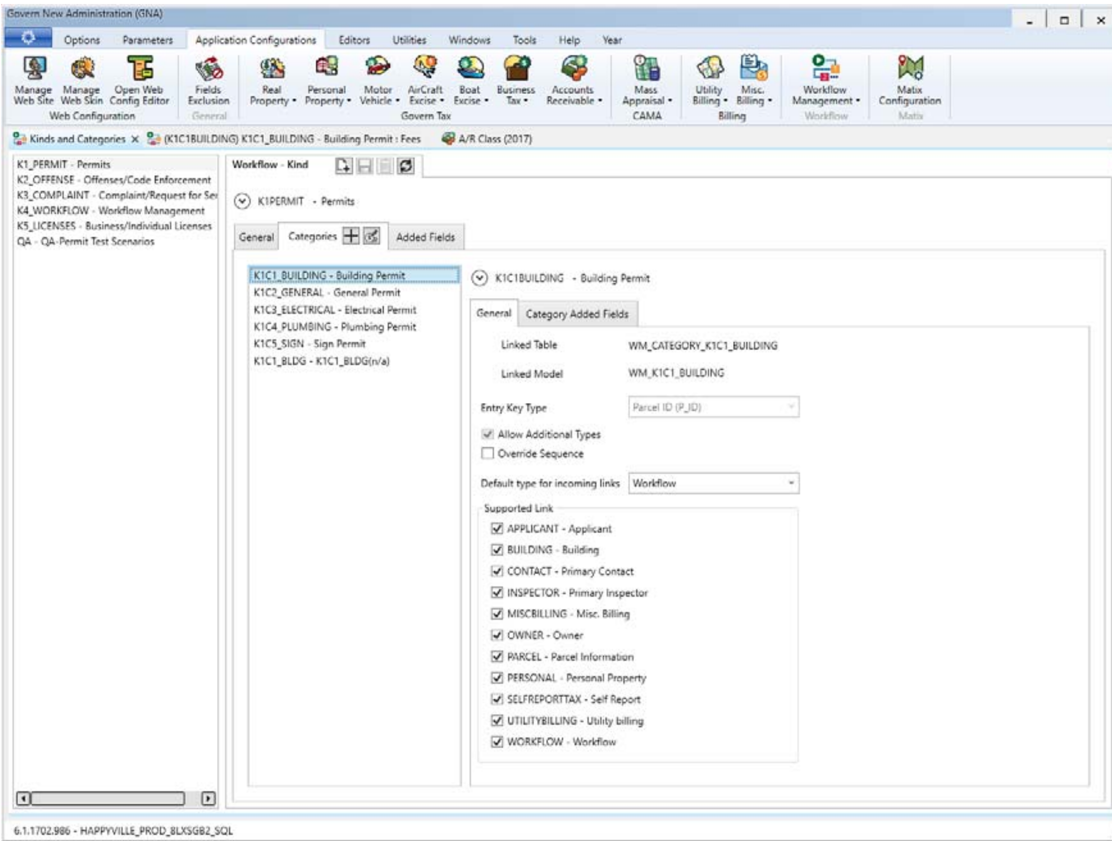


9. Enter the following values beside the associated codes:
   - **COM**: 1000.0
   - **NONRES**: 150.0
   - **RES**: 475.0
   - **UTIL**: 600.0
10. Click **Save**.

Add the Lookup Validation Table to a Fee

To set up a fee code that uses the lookup table:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Kinds and Categories**.



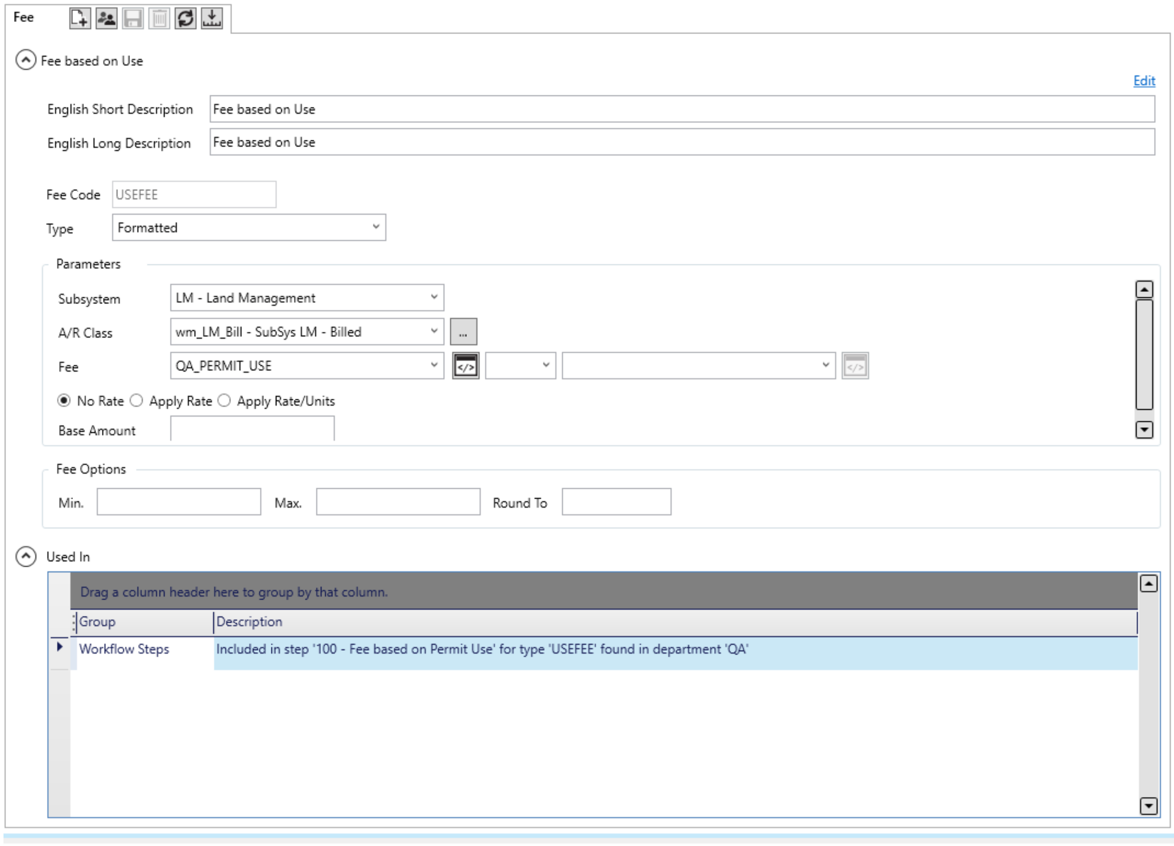
All existing Kinds are listed in the tree view on the left.

3. Select **QA - QA-Permit Test Scenarios**.
4. Select the **Categories** tab.

   The categories are listed in the tree view on the left.

5. Select the **QA_01 - Category-Allows Sub-Type**.
6. Click the **Edit Fees** action button  at the top of the form.

   The Fee Method Editor opens.



Existing workflow fees are listed on the left by Type: Expression, Formatted, and Group.

Creating the New Fee Method and Adding Values to the Validation Table

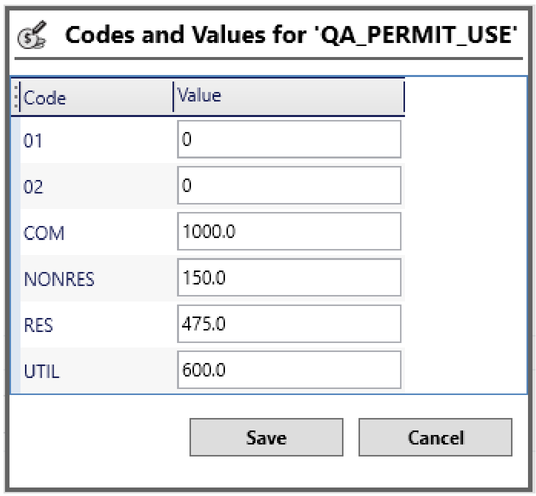
When you set up the fee method, you need to add the values for the property uses in the validation table.

To create the fee method and add values to the validation code:

1. Enter **USEFEE** in **Fee Code** parameter to uniquely identify the fee.
2. Click the drop-down arrow to expand the description fields.
3. Enter **Fee based on use** in the **English Short** and **Long Description** fields.
4. Select **Formatted** from the **Type** drop-down list.

5. Select **LM - Land Management** from the **Subsystem** drop-down list.
6. Select **wm_LM_Bill - SubSys LM - Billed** from the **A/R Class** drop-down list
7. Click the drop-down list button in the **Fee** field and select the table **QA_PERMIT_USE**:
8. Click the values icon next to the validation table.

   The Codes and Values form the QA_PERMIT_USE table opens.



9. Enter the following:
   - COM: 1000.00
   - NONRES: 150.00
   - RES: 475.00
   - UTL: 600.00
10. Click **Save** on the **Codes and Values for QA_PERMIT_USE** form.
11. Click **Save** on the **Fee** form.

Add the Fee to a Workflow

Fees are added to workflows at the Activity Steps.

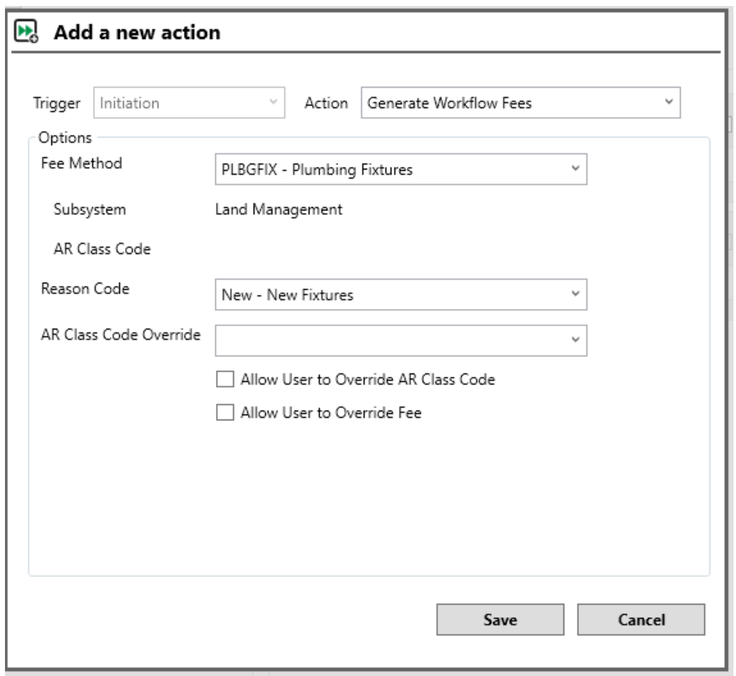
To add a fee to a workflow:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Departments**.

3. Select **QA - QA-Permit (Test Scenarios)**.
4. Click the **Step** icon.
5. Select **100 - Fee Step**.
6. Select the + icon to add a status.
7. Select **True** from the drop-down list and enter **999** in the **Go to** field.

   This opens the **Add a new action** form.

   The **Trigger** parameter is automatically populated.



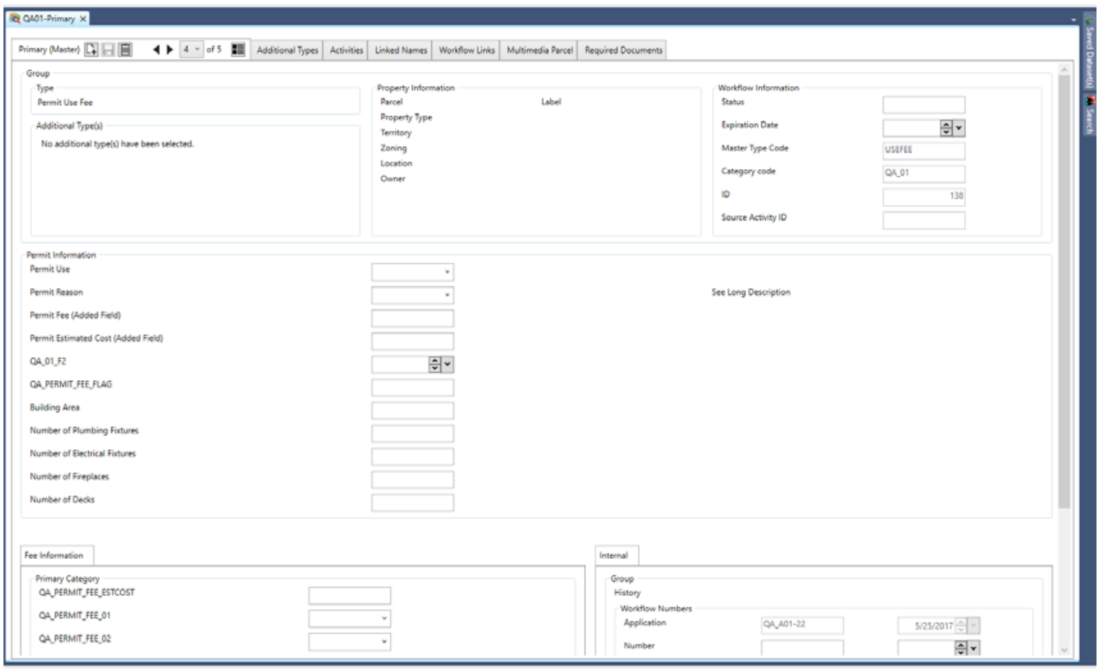
8. Select **Generate Workflow Fee** from the **Action** drop-down list.
9. Select **FEE_TYPE01 - Fee Type 01** from the **Fee Method** drop-down list.
10. The **Subsystem** parameter is automatically populated.
11. Select **02 - A/R Reason 02** from the **Reason Code** drop-down list.

    This is an optional field.
12. Select **wm_L2_Bill - SubSys L2 - Billed** from the **A/R override** parameter if users can over the selected A/R Class.
13. Select **Allow User to Override Fee**.
14. Click **Save** on the **Edit action** window.
15. Click **Save** on the **Activity Setup** window.

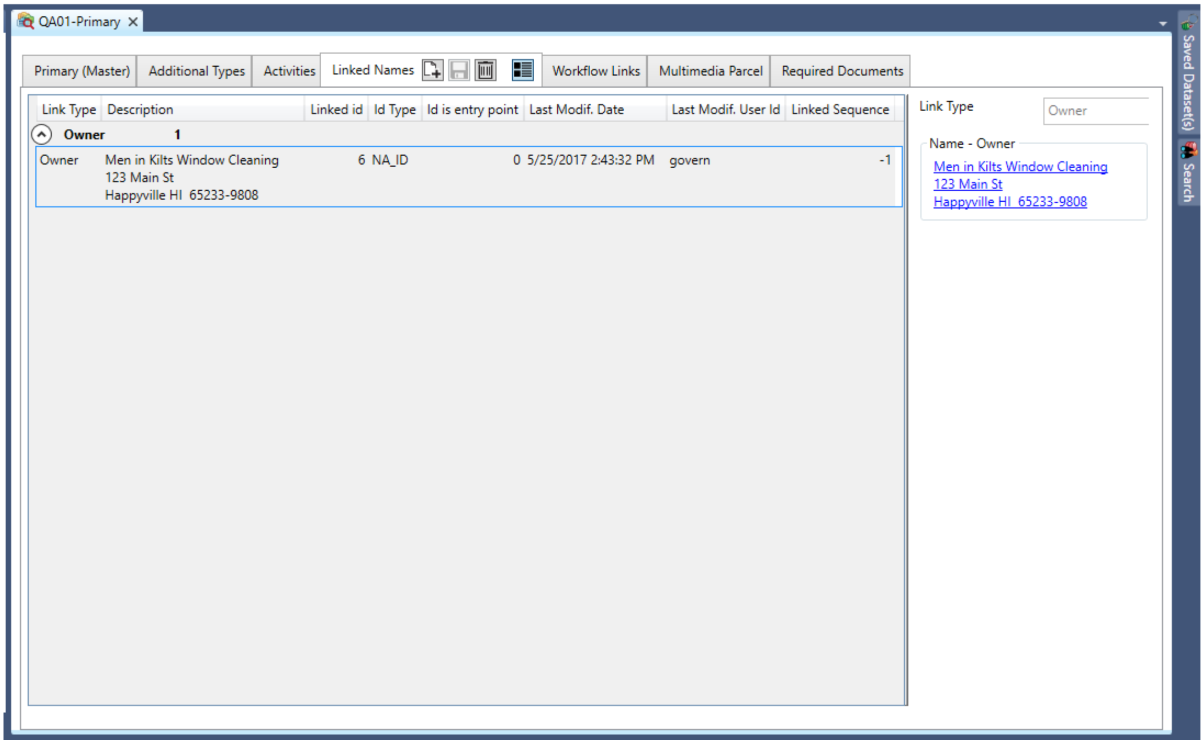
Launch the Workflow

To test the fee in a workflow:

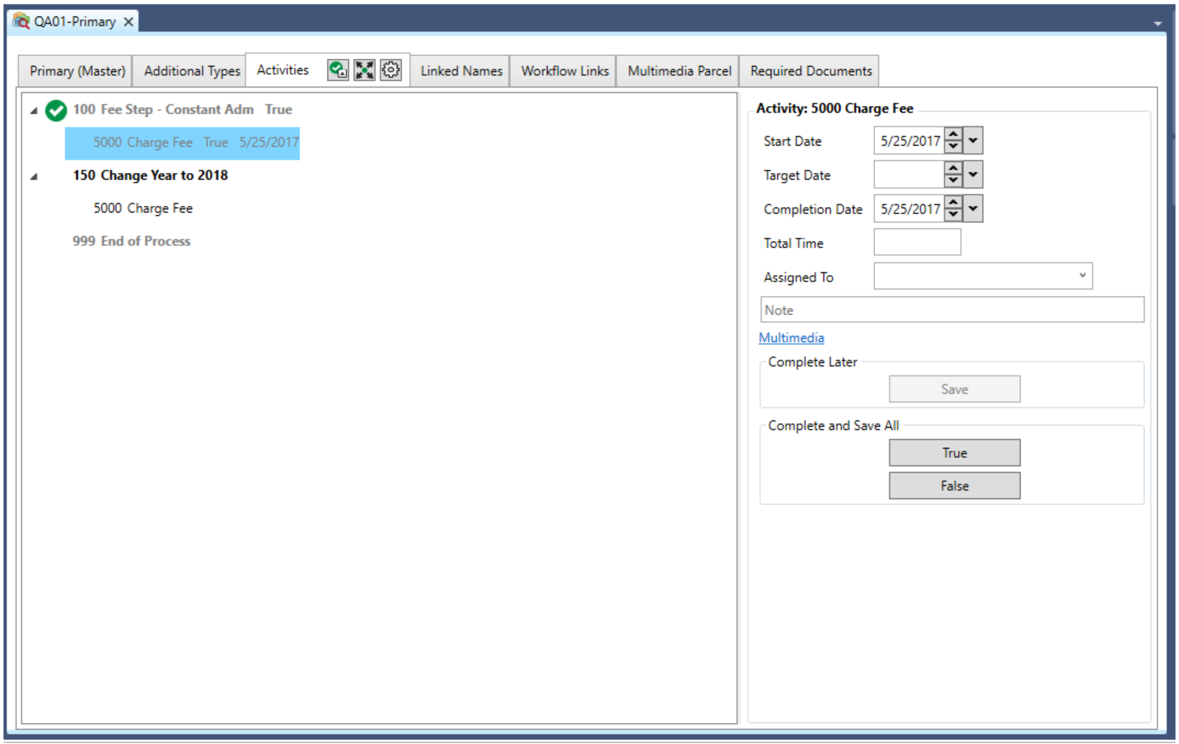
1. Launch Govern.
2. Open the **QA - Test Scenarios - wm Profile**.
3. Open the **Primary (Master)** form.



4. Perform a search for a property record and add the results to the tree view
5. Select **Permit Use Fee** from the **Type** drop-down list.
6. Click **Save**.
7. Select the **Linked Names** tab.



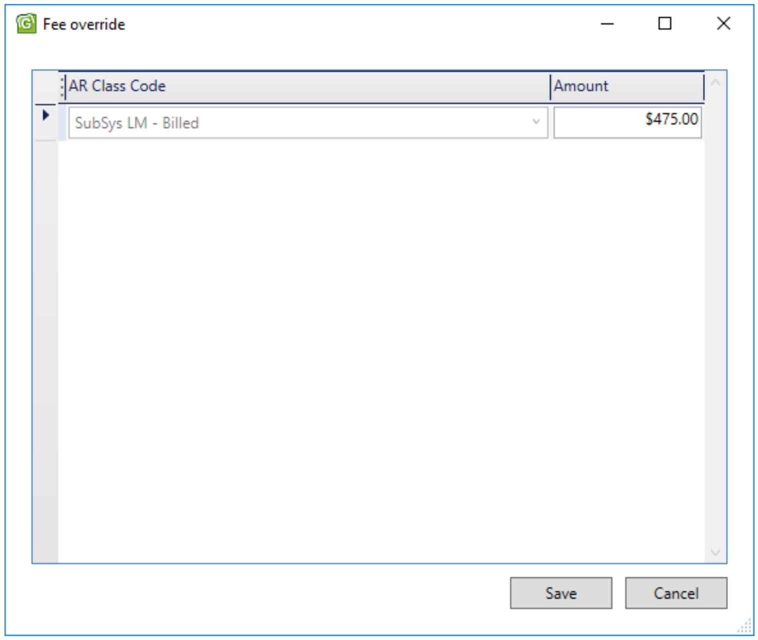
8. Click **New**.
9. Select **Owner** from the **Link Type** drop-down list.
10. Select the **General** tab.
11. Select **Residential** from the **Permit Use** field.
12. Select the **Activities** tab.



13. Click **True** beside the first step.

    A fee of **$475.00** is charged.

    The Fee Override form appears if the **Allow user to overwrite fee option** is selected on the Add a new action form, the form used to set up the workflow activity.



14. Override the value in the **Amount** field and click **Save** to overwrite the calculated fee.
15. Repeat steps 10 to 14, substituting the following in step 11 for the corresponding value:
    - **Commercial**: $1000.00
    - **Non-Residential**:$150.00
    - **Utilities**: $600.00

Viewing the Fee in A/R Inquiry

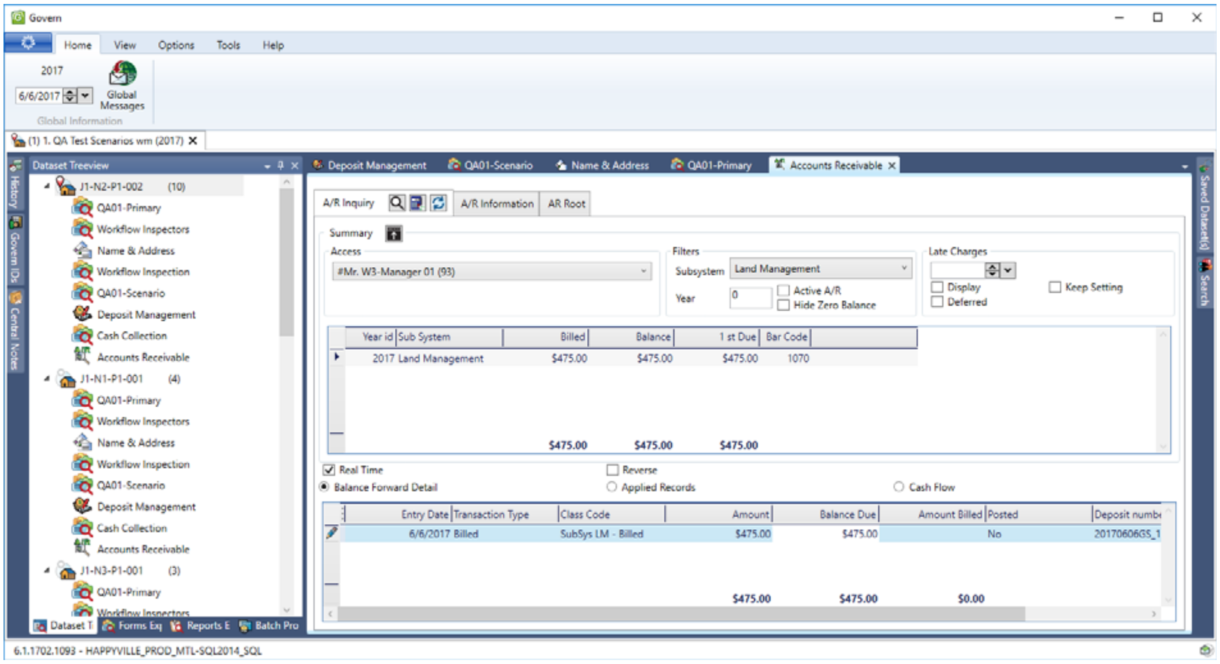
For this step, A/R Inquiry is added to the same Profile.

To view the fee in A/R Inquiry:

1. Open the A/R Inquiry form.
2. Perform a search for the Name ID associated with the record.

> **Tip:** You can view the Name ID by opening the Govern IDs panel on the left of the form.

3. Load the Name record to the form.
4. Select the record in the Summary section to view it in the Detail section.



Formatted Type Fee With Added Fields

Overview

In this scenario, a fee is based on the calculation of two user-added fields. The fee is generated from an activity step added to a workflow.

The added fields are the Estimated Cost (Estimate) and the Permit Fee (Fee). The user enters values in these fields when completing the workflow. The calculation is

(Estimate - Fee) * 0.05

The following calculations could also be performed

(Estimate + Fee) * 0.05

(Estimate / Fee) * 0.05

(Estimate * Fee) * 0.05

The required steps for this type of fee are described, from the setup of this fee method through to the execution of the workflow:

- Create the Added Fields
- Create the fee
- Add the Fee to a Workflow
- Launch the Workflow

Creating the Added Fields

The fields used in the calculation are added in the Business Entity Designer and positioned in the OpenForms Designer (OFD).

The procedures in this section describe how to create the Estimated Cost and Permit Fee fields.

Adding Fields to an Workflow Kind and Category

This section describes the following:

- Adding Fields to the Workflow Kind or Category
- Adding Fields in the Business Entity Designer
- Repositioning Fields in the OpenForms Designer

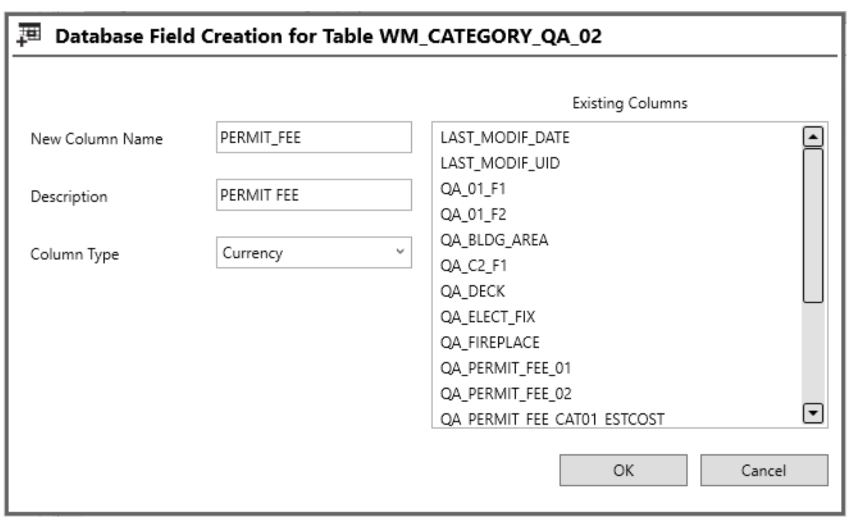
Adding Fields to the Workflow Kind and Category

The first step is to add the fields to the workflow kind and category. This step is performed on the Kinds and Category form. When you complete the procedure and click save, the new fields are automatically added to the business model and the entity in the Business Entity Designer (BED).

To add fields to a workflow kind:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Kinds and Categories**.
3. Select the Workflow Kind corresponding to the from you want to modify.
4. Do one of the following:
   - Select the **Added Fields** tab if the fields required for all categories.
   - Select **Categories** > **Category Added Fields** if the fields are specific to a single category.
5. Click the plus icon.

   This opens the Database Field Creation window.



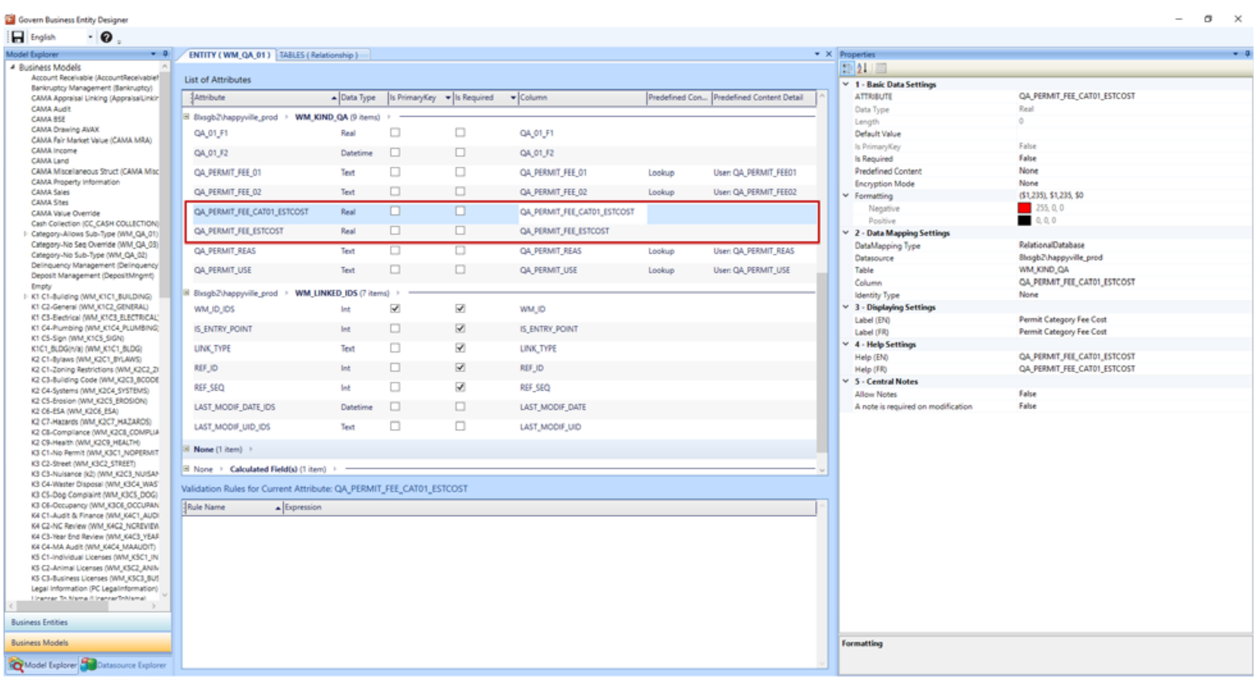
6. Enter **QA_PERMIT_FEE_CAT01_ESTCOST** in the **Column Name** field.

7. Enter **Estimated Cost** in the **Description** field.
8. Select Currency from the **Column Type** drop-down list.
9. Click **OK** on the Database Creation window.
10. Enter **QA_01_F1_CURRENCY** in the **Column Name** field.
11. Enter **Permit Fee** in the **Description** field.
12. Select Currency from the **Column Type** drop-down list.
13. Click **OK** on the **Database Creation** window.
14. Click **Save** on the Kinds and Categories form.

Formatting the Added Fields in the Business Entity Designer (BED)

To add fields to a form:

1. Launch the Business Entity Designer (BED).
2. Open the Business Models Explorer.
3. Select the **WM_QA_01** model.
4. Double-click on the **WM_QA_01** entity to open it.



The added fields are listed with the other attributes in the entity.

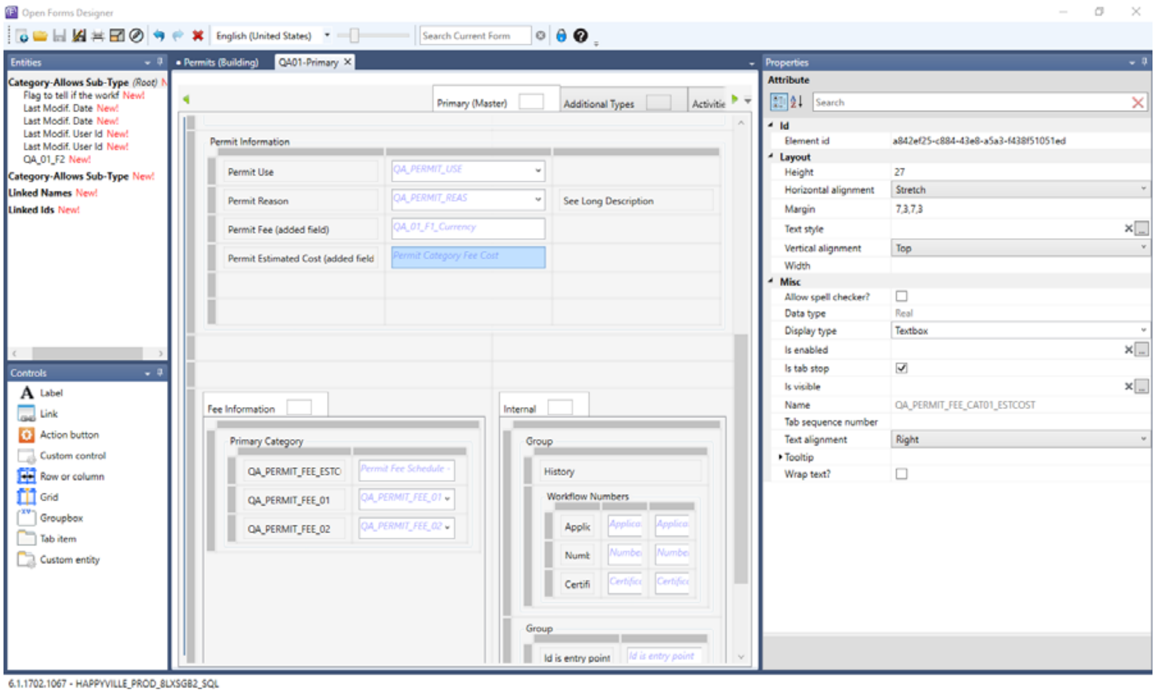
5. Select the **QA_01_F1 Currency** field.
6. Select a formatting type from the **Formatting** drop-down list.
7. Make any other required changes.
8. Click **Save**.
9. Select the **Permit Category Fee Cost** field.
10. Select a formatting type from the **Formatting** drop-down list.
11. Make any other required changes.
12. Click **Save**.

Reposition the Added Fields

Use the OpenForms Designer (OFD) to reposition the added fields on the form and set security.

To modify the position and format of the added field:

1. Launch the OpenForms Designer (OFD).
2. Open the QA01 - Primary form.



3. Select the **Permit Estimated Cost** field.
4. Make any required changes.
5. Click **Save**.
6. Select the **QA_01_F1_Currency** field.
7. Make any required changes.
8. Click **Save**.

To set the security:

1. Launch the OpenForms Designer (OFD).
2. Select the Security **Type**, **Profile**, and **Role** or **User**.
3. Select the added field.
4. Grant or restrict viewing and editing permissions as required.
5. Click **Save**.

Creating a New Fee Method Using the Added Fields

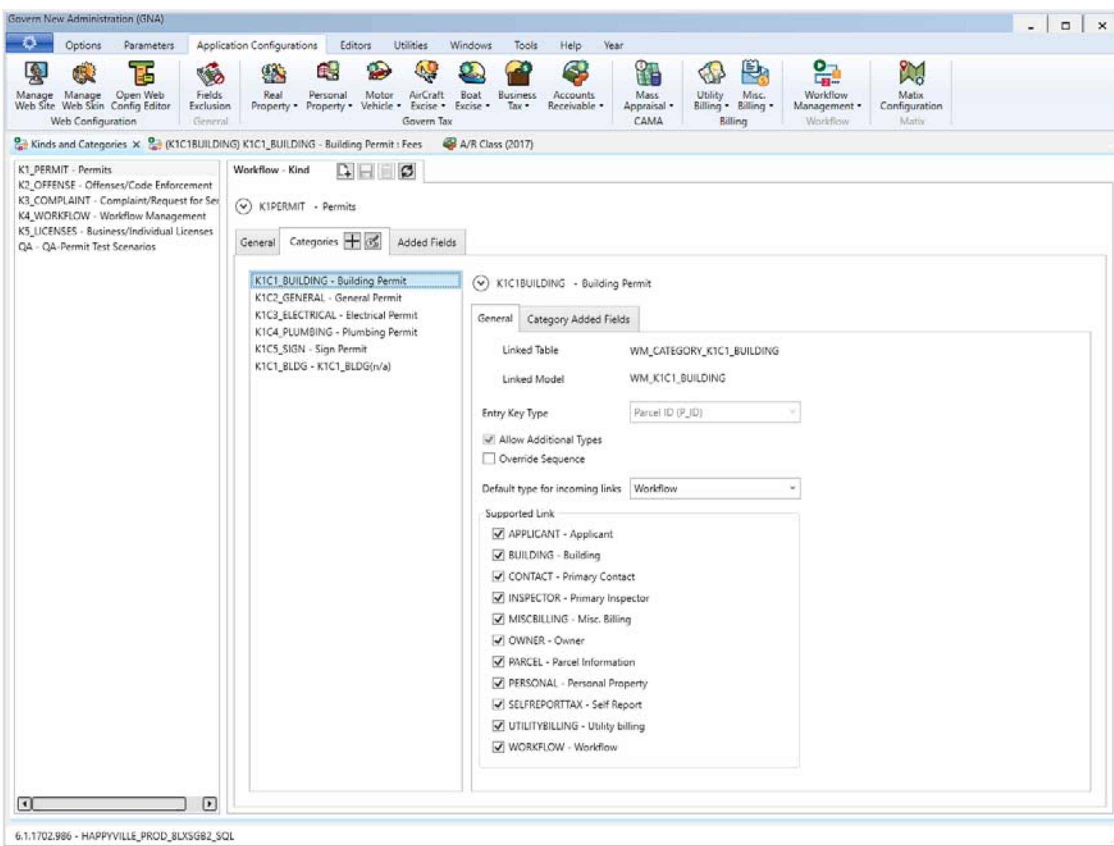
This procedure is divided into the following steps:

- Accessing the Fee Method Form
- Creating the New Fee Method with a calculation

Accessing the Workflow Fee Method Editor

To access the Workflow Fee Editor:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Kinds and Categories**.



3. Select the **Categories** tab.

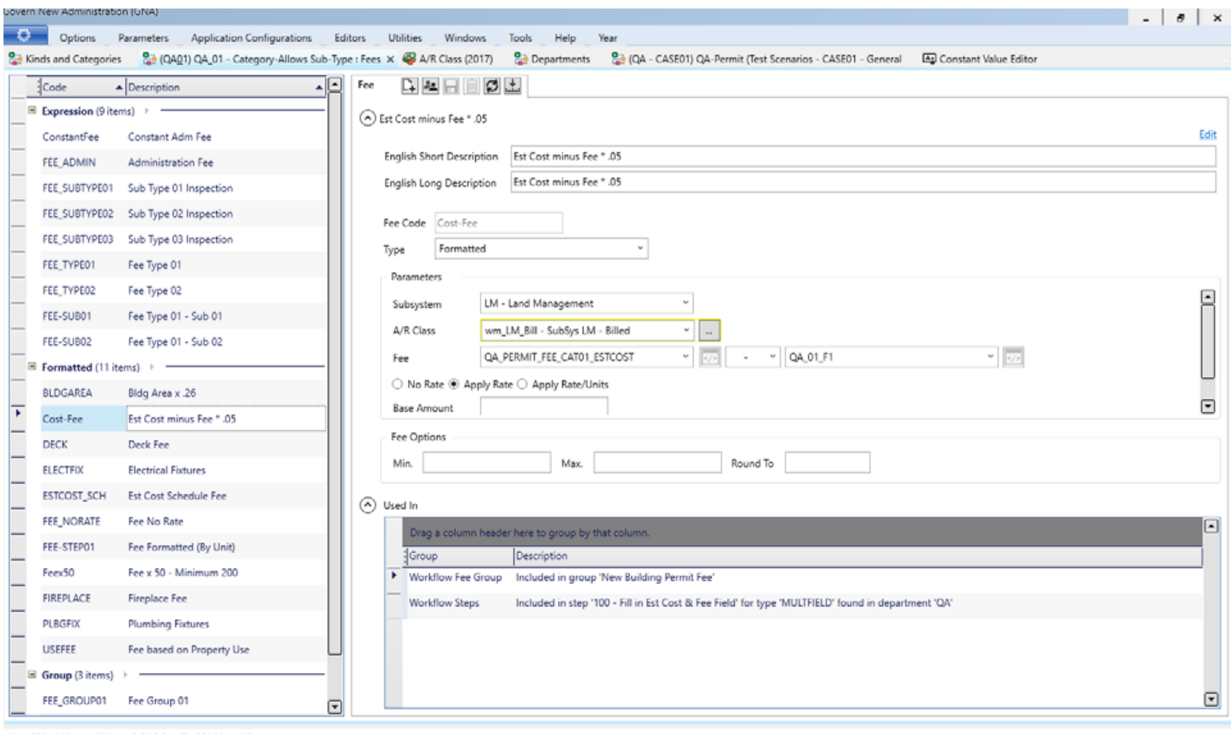
   The categories are listed in the tree view on the left.

4. Select a category.

5. Click the **Edit Fees** action button at the top of the form.

   Note: The Edit Fees button is disabled if the fee has not been saved.

   The Fee Method Editor opens.



Existing workflow fees are listed on the left by Type: Expression, Formatted, and Group.

Creating a Fee with Added Fields

To create a fee with the added fields:

1. Enter **Cost - Fee** in the **Fee Code** field.
2. Click the drop-down arrow to expand the description fields.

3. Enter **Est Cost minus Fee * 0.05** in the **English Short** and **Long Description** fields.
4. Select **Formatted** from the **Type** drop-down list.
5. Select **LM - Land Management** from the **Subsystem** drop-down list.
6. Select **wm_LM_Bill - SubSys LM - Billed** from the **A/R Class** drop-down list
7. Click the drop-down list button in the first **Fee** field and select the column **QA_PERMIT_FEE_CAT01_ESTCOST**:
8. Select **-** from the operator field.
9. Select **QA_01_F1** from the second drop-down list.
10. Click **Save** on the **Fee** form.

Add the Fee to a Workflow

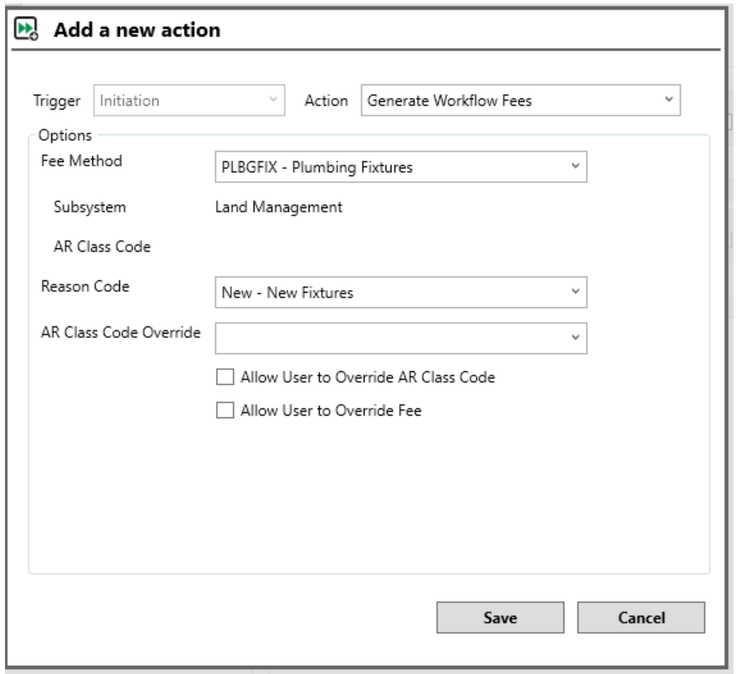
Fees are added to workflows at the Activity Steps.

To add a fee to a workflow:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Departments**.
3. Select **QA - QA-Permit (Test Scenarios)**.
4. Click the **Step** icon.
5. Select **100 - Fee Step**.
6. Select the + icon to add a status.
7. Select **True** from the drop-down list and enter **999** in the **Go to** field.

   This opens the **Add a new action** form.

   The **Trigger** parameter is automatically populated.



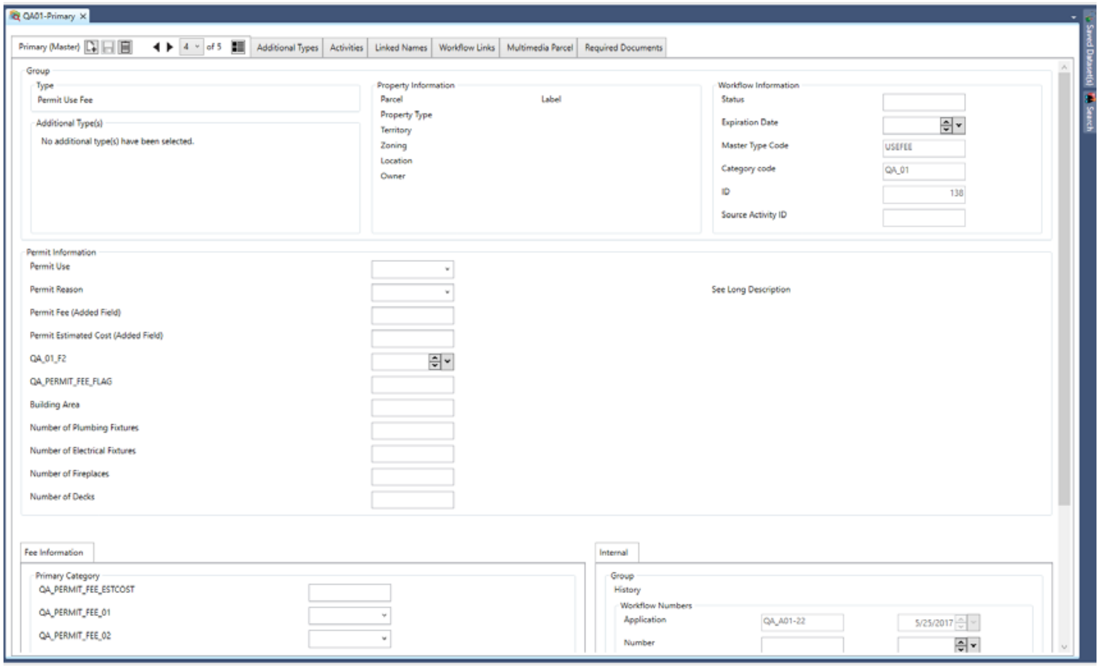
8. Select **Generate Workflow Fee** from the **Action** drop-down list.
9. Select **FEE_TYPE01 - Fee Type 01** from the **Fee Method** drop-down list.
10. The **Subsystem** parameter is automatically populated.
11. Select **02 - A/R Reason 02** from the **Reason Code** drop-down list.

    This is an optional field.
12. Select **wm_L2_Bill - SubSys L2 - Billed** from the **A/R override** parameter if users can over the selected A/R Class.
13. Select **Allow User to Override Fee**.
14. Click **Save** on the **Edit action** window.
15. Click **Save** on the **Activity Setup** window.

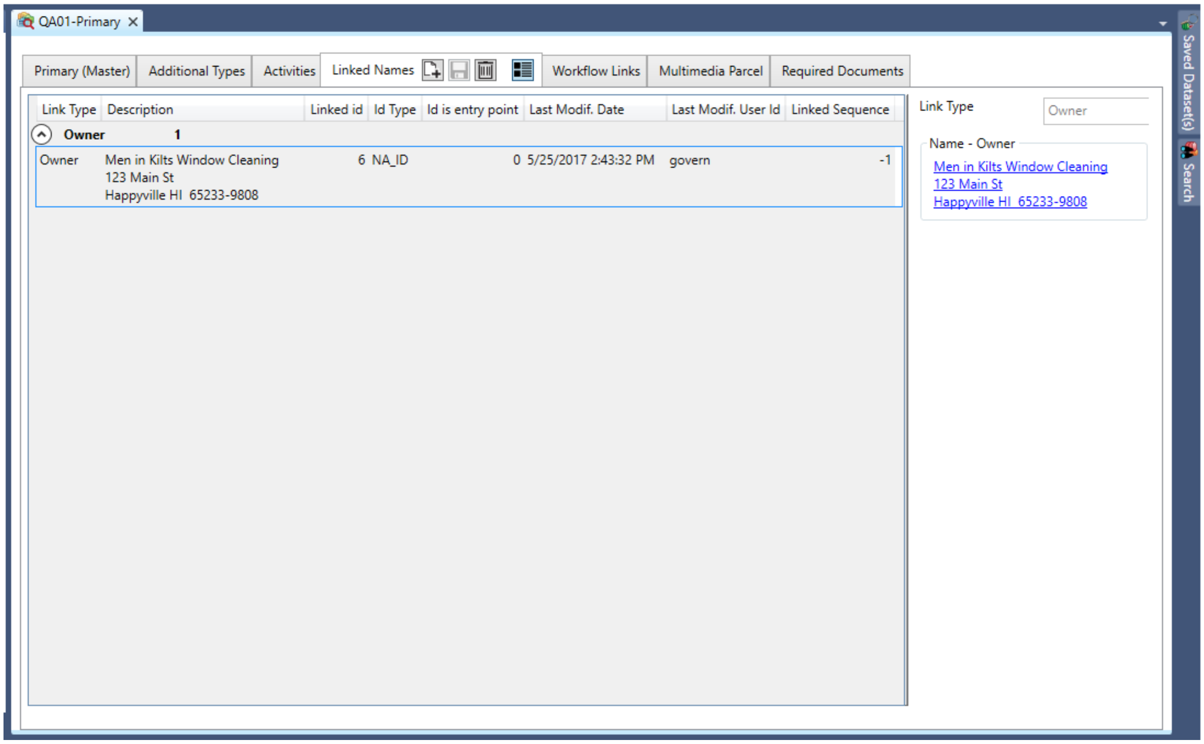
Launch the Workflow

To test the fee in a workflow:

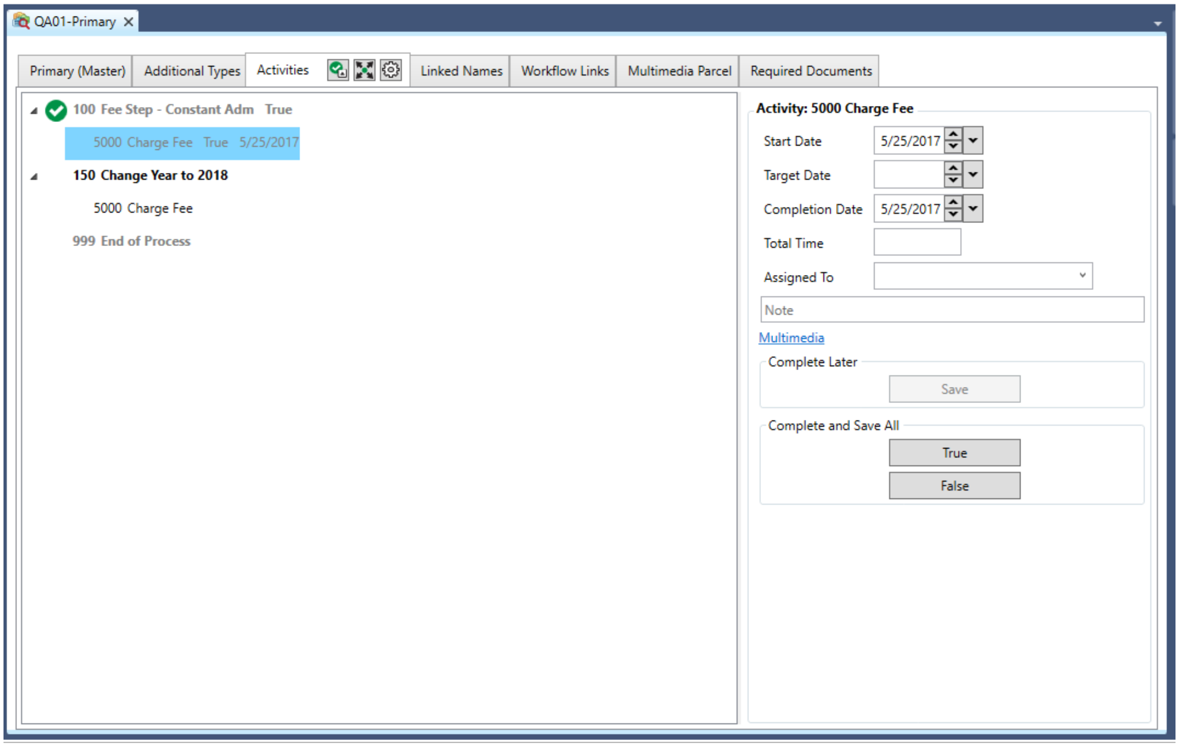
1. Launch Govern.
2. Open the **QA - Test Scenarios - wm Profile**.
3. Open the **Primary (Master)** form.



4. Perform a search for a property record and add the results to the tree view
5. Select **Multiple Field x Rate** from the **Type** drop-down list.
6. Click **Save**.
7. Select the **Linked Names** tab.



8. Click **New**.
9. Select **Owner** from the **Link Type** drop-down list.
10. Select the **General** tab.
11. Enter **$100.00** in the **Permit Estimated Cost (added field)** field.
12. Enter **$10.00** in the **Permit Fee (added field)** field.
13. Select the **Activities** tab.



14. Click **True** beside the first step.

15. A fee of $4.50 is charged for the following calculation:

(Estimated Cost - Fee) * 0.05

(100 - 10) * 0.05 = $4.50

Viewing the Fee in A/R Inquiry

If you were to perform the same calculation with different operators, the expected results would be:

(Estimate / Fee) * 0.05

(100 / 10) * 0.05 = $0.50

(Estimate * Fee) * 0.05

(100 * 10) * 0.05 = $50.00

(Estimate + Fee) * 0.05

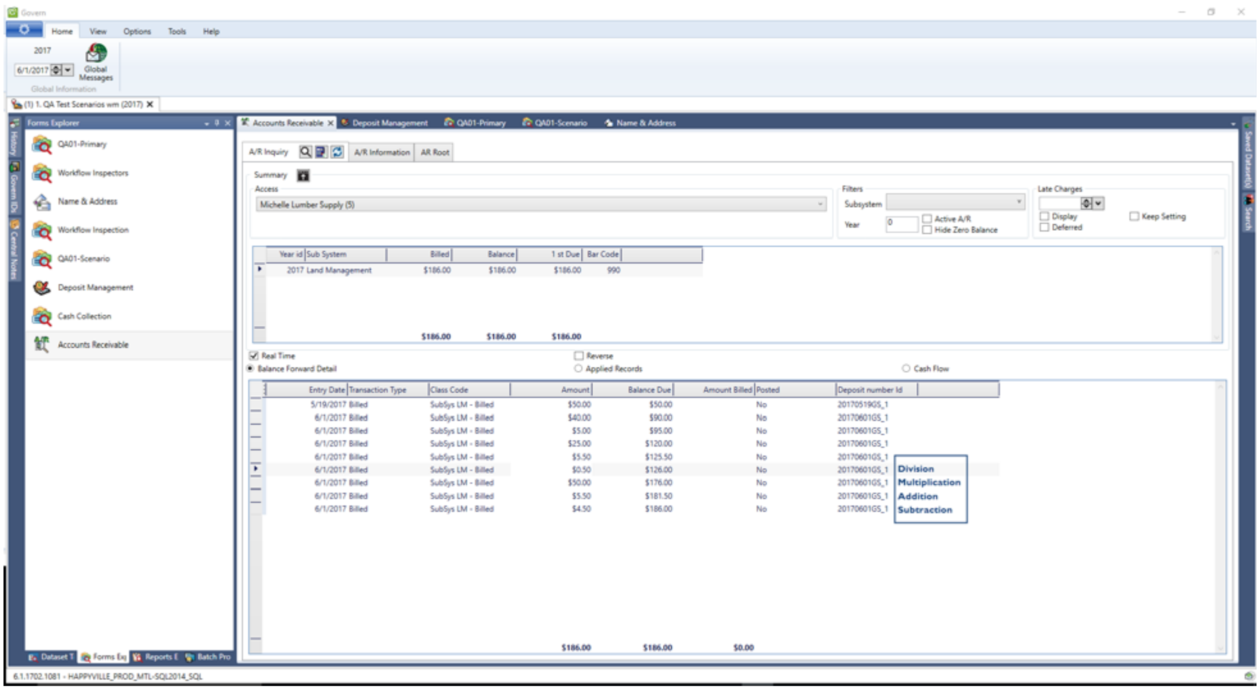
(100 + 10) * 0.05 = $5.50

(Estimate + Fee) * 0.05

(100 - 10) * 0.05 = $4.50

To view the results on the Accounts Receivable form:

1. Open the A/R Inquiry form in Govern.
2. Perform a search for the Name ID of the owner.
3. Select the record in the Summary section.
4. View the results in the Detail section.


Division
Multiplication
Addition
Subtraction

Formatted Type Fee with Schedule

Overview

In this scenario, the fee for a permit is based on the number of building units. The rates are defined in a schedule that is set up per units.

This section contains the following topics:

- Create a New Fee With a Rate Schedule on page 66
- Launch the Workflow on page 70

Create a New Fee With a Rate Schedule

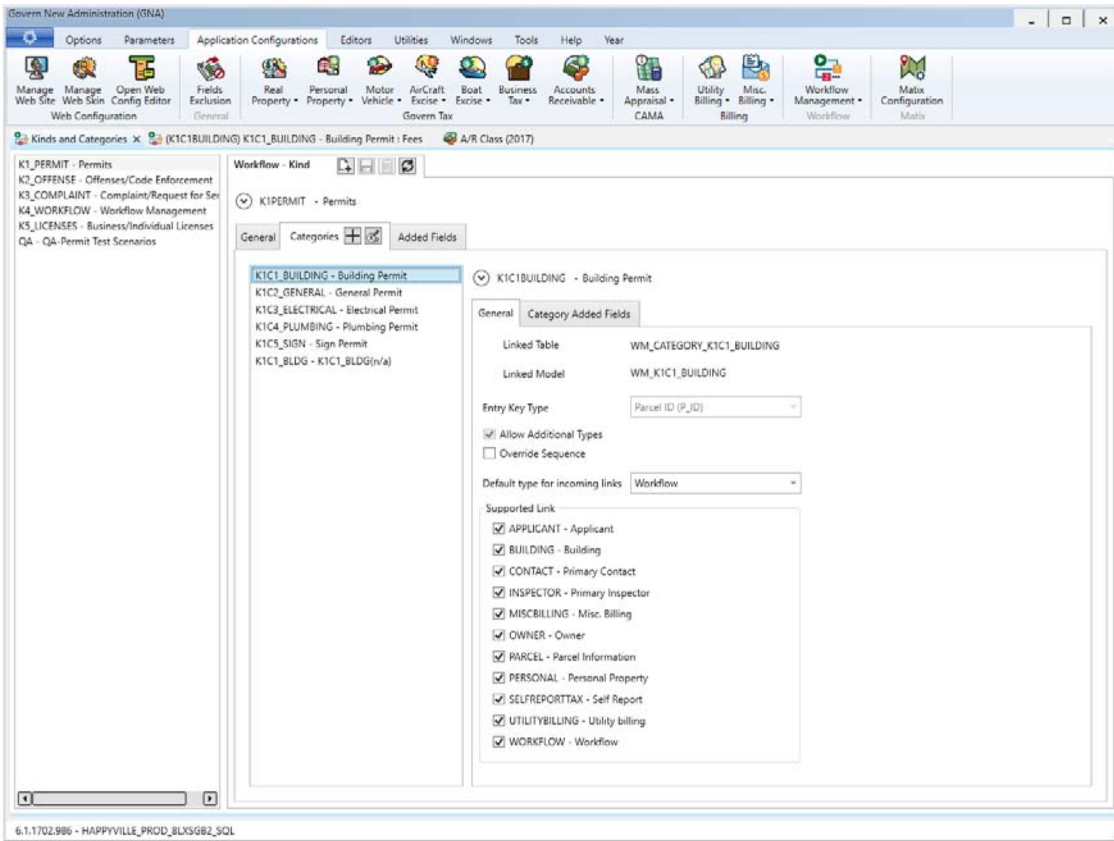
This procedure is divided into the following steps:

- Accessing the Fee Method Form
- Creating the New Fee Method with the Validation Table

Accessing the Fee Method Form

To access the fee method form:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Kinds and Categories**.

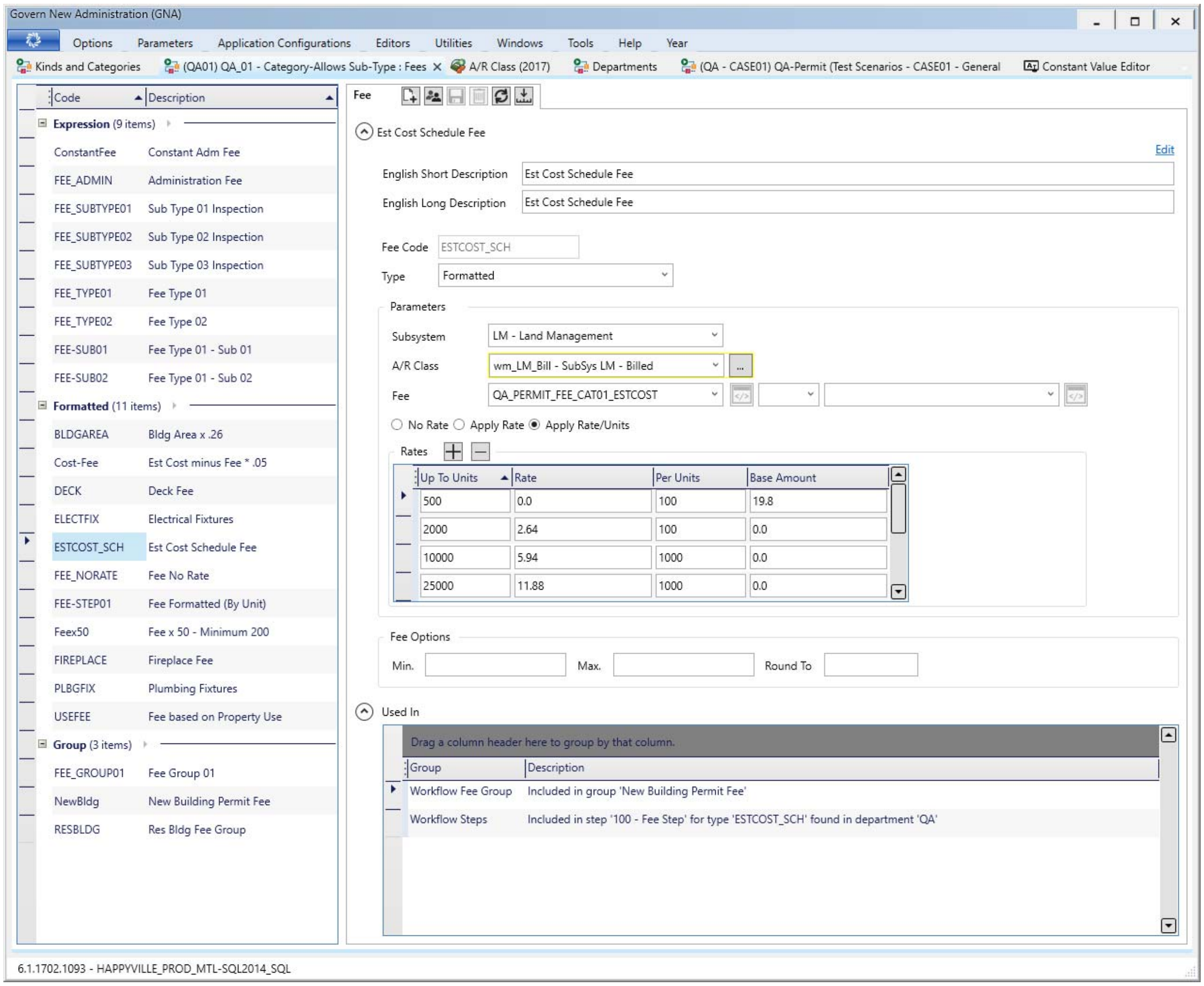


All existing Kinds are listed in the tree view on the left.

3. Select **QA - QA-Permit Test Scenarios**.
4. Select the **Categories** tab.

   The categories are listed in the tree view on the left.
5. Select the **QA_01 - Category-Allows Sub-Type**.
6. Click the **Edit Fees** action button at the top of the form.

   The Fee Method Editor opens.



Creating a Formatted Fee with the Rate Schedule

To create the new fee method with the rate schedule:

1. Enter **ESTCOST_SCH** in the **Fee Code** parameter.
2. Click the drop-down arrow to expand the description fields.
3. Enter **Est Cost Schedule Fee** in the **English Short** and **Long Description** fields.
4. Select **Formatted** from the **Type** drop-down list.
5. Enter **LM - Land Management** in the **Subsystem** parameter.
6. Select **wm_LM_Bill - Subsys FM - Billed** in the **A/R Class** parameter.

7. Select the **QA_PERMIT_FEE_CA01_ESTCOST** from the first **Fee** drop-down list.
8. Select the **Apply Rate/Units** option.
9. Click the plus icon and enter the following:

Up to Units	Rate	Per Units	Base Amount
500	0.0	100	19.8
2000	2.64	100	0.0
10000	5.94	1000	0.0
25000	11.88	1000	0.0

10. Click **Save**.

Add the Fee to a Workflow

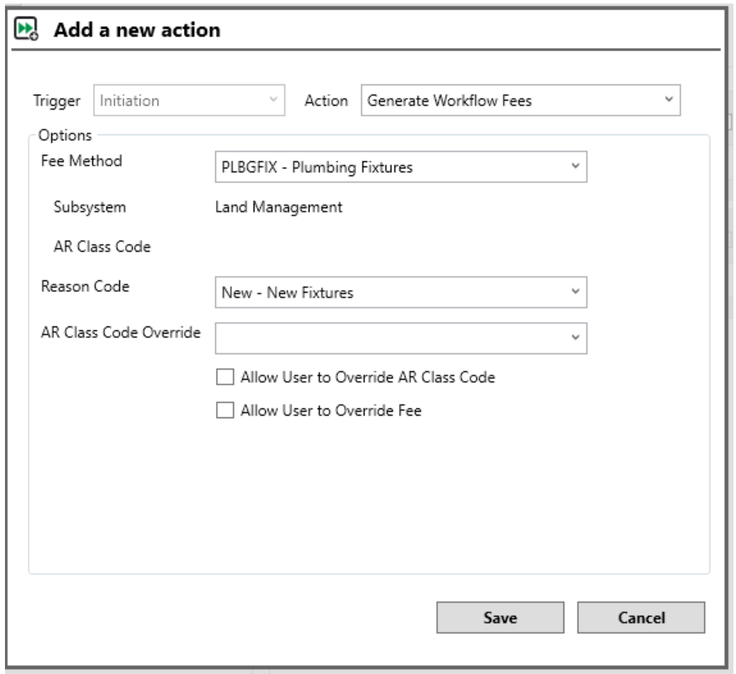
Fees are added to workflows at the Activity Steps.

To add a fee to a workflow:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Departments**.
3. Select **QA - QA-Permit (Test Scenarios)**.
4. Click the **Step** icon.
5. Select **100 - Fee Step**.
6. Select the + icon to add a status.
7. Select **True** from the drop-down list and enter **999** in the **Go to** field.

   This opens the **Add a new action** form.

   The **Trigger** parameter is automatically populated.



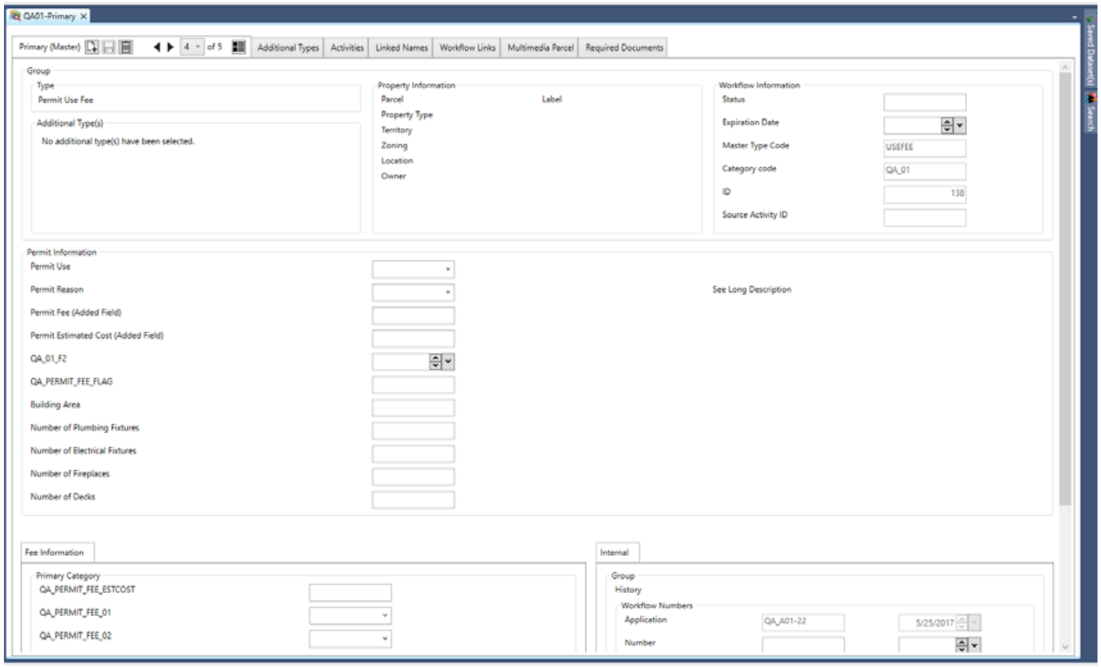
8. Select **Generate Workflow Fee** from the **Action** drop-down list.
9. Select **FEE_TYPE01 - Fee Type 01** from the **Fee Method** drop-down list.
10. The **Subsystem** parameter is automatically populated.
11. Select **02 - A/R Reason 02** from the **Reason Code** drop-down list.

    This is an optional field.
12. Select **wm_L2_Bill - SubSys L2 - Billed** from the **A/R override** parameter if users can over the selected A/R Class.
13. Select **Allow User to Override Fee**.
14. Click **Save** on the **Edit action** window.
15. Click **Save** on the **Activity Setup** window.

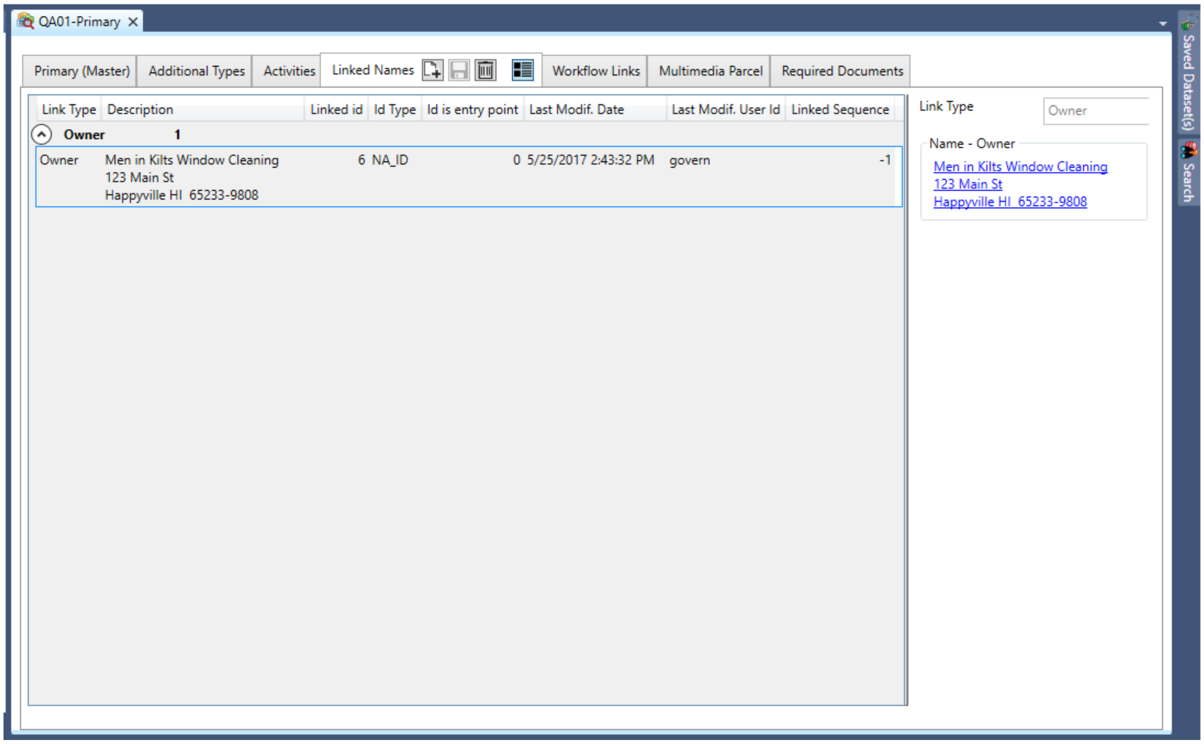
Launch the Workflow

To verify the fee and rate schedule in a workflow:

1. Launch Govern.
2. Open the **QA - Test Scenarios - wm Profile**.
3. Open the **Primary (Master)** form.

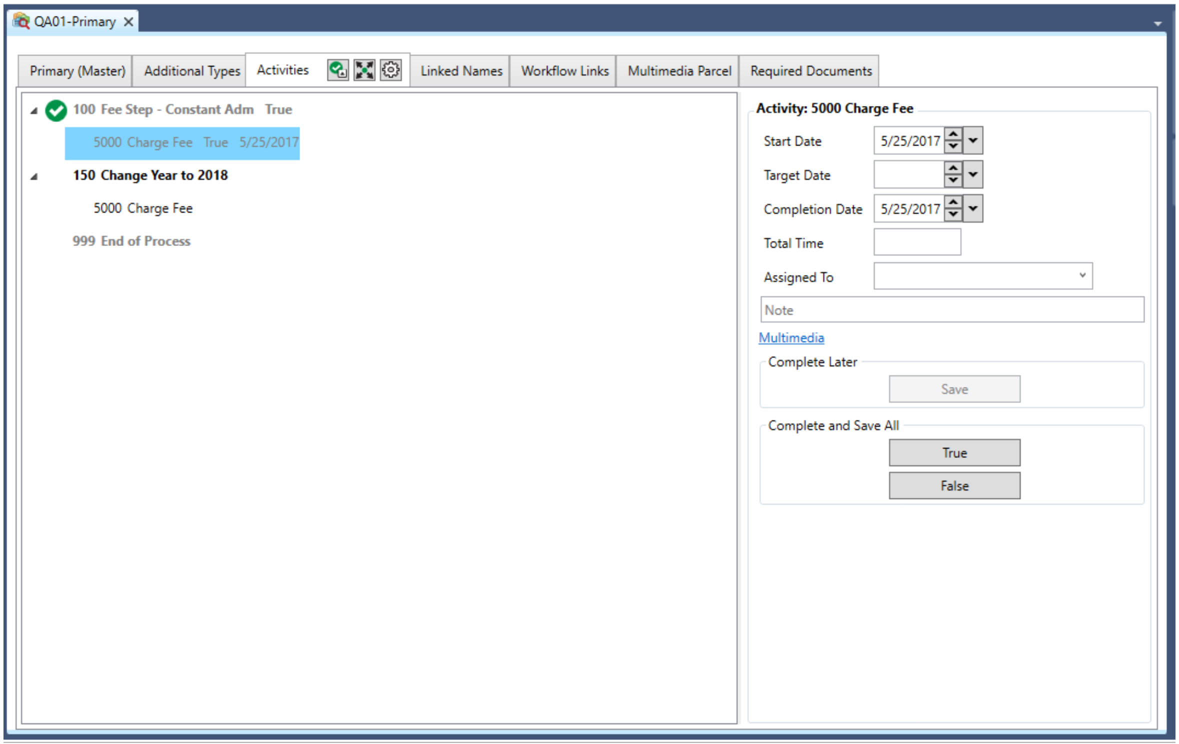


4. Perform a search for a property record and add the results to the tree view
5. Select **ESTCOST_SCH** from the **Type** drop-down list.
6. Click **Save**.
7. Select the **Linked Names** tab.



8. Click **New**.
9. Select **Owner** from the **Link Type** drop-down list.
10. Select the **General** tab.
11. Enter **25000** in the **Permit Estimated Cost (added field)** field.

    This is the number of units.
12. Select the **Activities** tab.

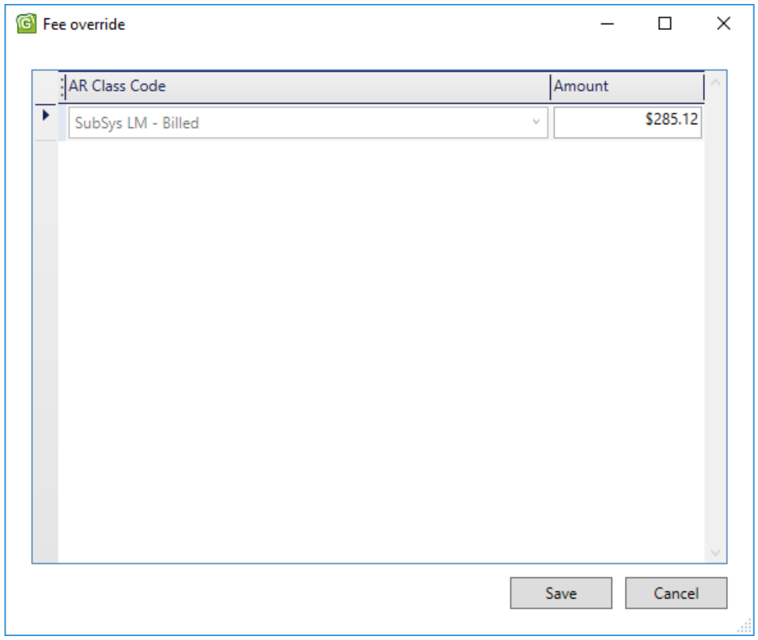


13. Click **True** beside the first step.

The fee for 23,000 is calculated as follows:

Number of Units	**Rate**	**Cost ($)**
1-500		19.80
501-2,000	1,500 * 2.64	39.60
2,001-10,000	8,000 * 5.94	47.52
25,000 - 10,0000	15,000 * 11.88	178.20
Total ($)		285.12

If the Allow User to Override Fee option is selected, the Fee Override window appears.



14. Do one of the following:
    - Override the value in the **Amount** field and click **Save** to overwrite the calculated fee if required.
    - Click **Cancel**.

Viewing the Fee in A/R Inquiry

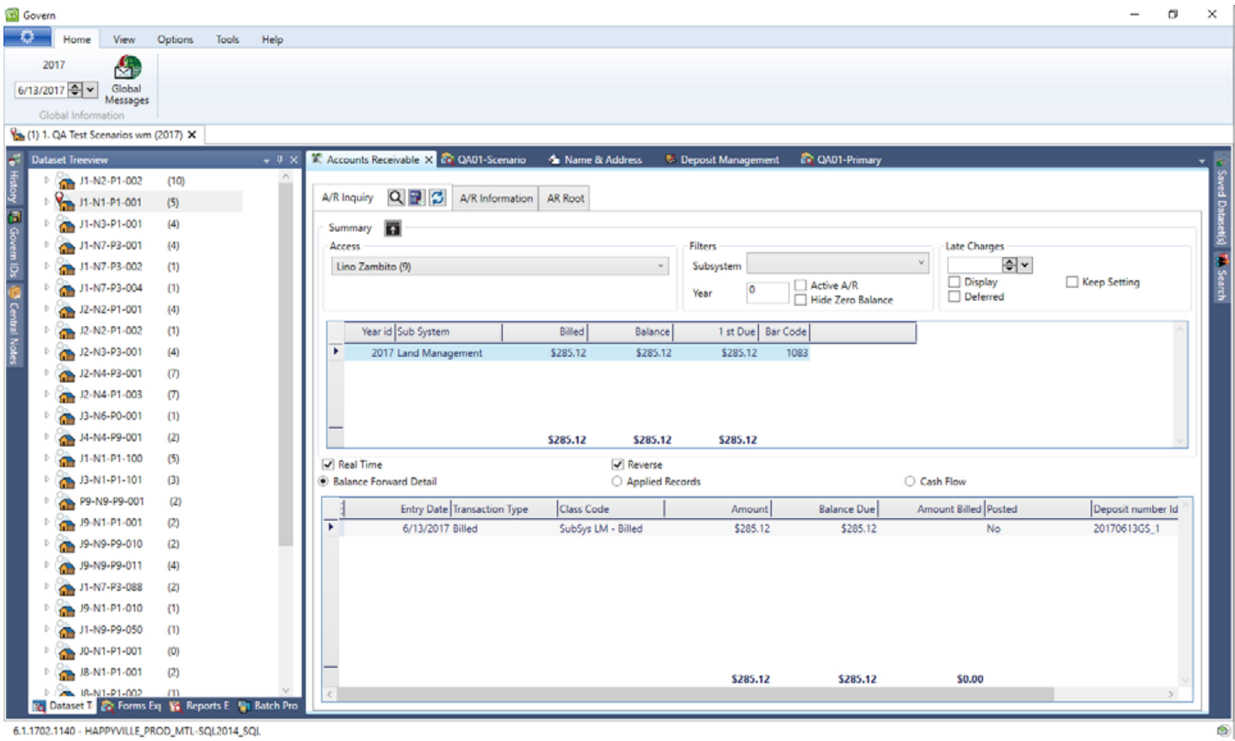
For this step, A/R Inquiry is added to the same Profile.

To view the fee in A/R Inquiry:

1. Open the A/R Inquiry form.
2. Perform a search for the Name ID associated with the record.

> **Tip:** You can view the Name ID by opening the Govern IDs panel on the left of the form.

3. Load the Name record to the form.
4. Select the record in the Summary section to view it in the Detail section.



Group Fee

Overview

The group type fee is a collection of single expression type and formatted type fees that are added together. It is used to generate more than one fee from an activity step.

The minimum, maximum, and round to fee options can be applied to a group fee if all fees are created with the same A/R Class Code. They can also be applied to each fee method within the group.

As described under Business Rules on page 3, if minimum, maximum, and rounding options are applied at both the individual fee method and the group fee method, they are applied on the individual fee. Then, they individual fees are added together and the options are applied on the group fee.

The following scenario illustrates how the maximum is applied to a group fee. There are two fee methods in the group. Those fees also have maximum amounts.

Fee Method	Fee ($)	Maximum ($)	Final Fee ($)
Fee Method A	300	200	200
Fee Method B	350	500	350
Group Fee	200 + 350 = 550	325	325

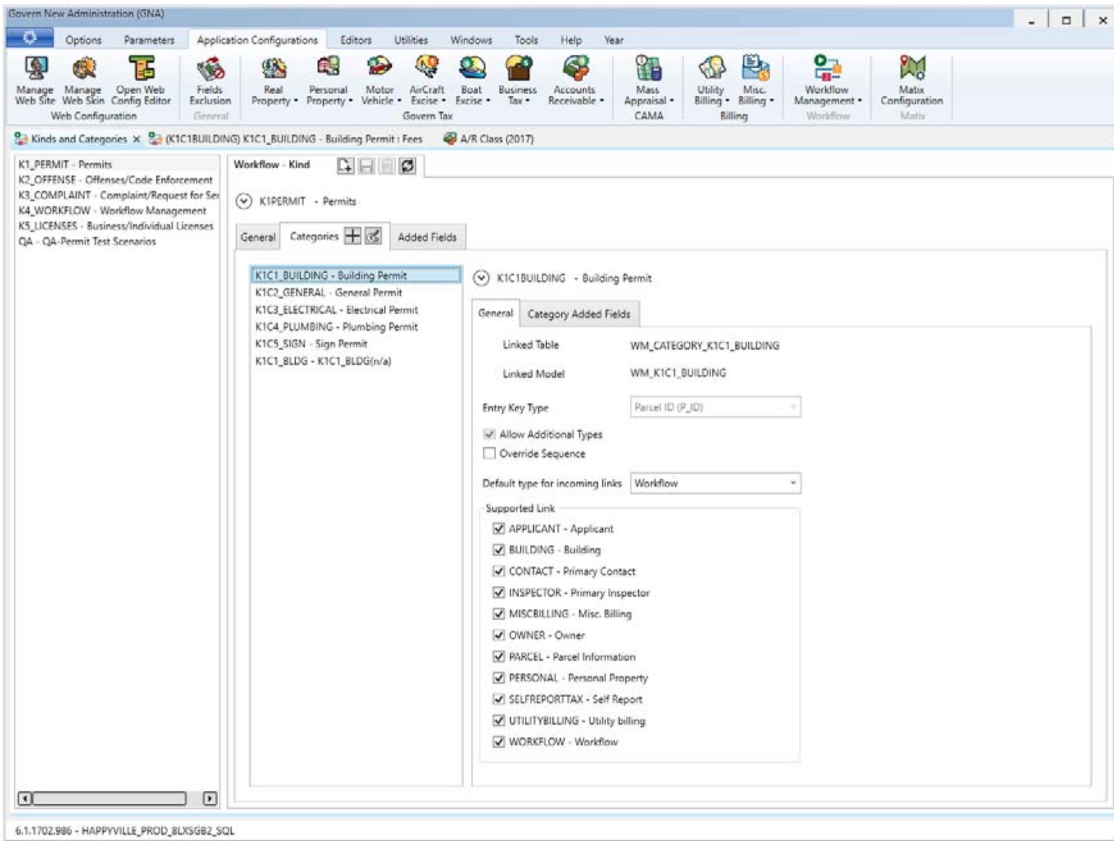
Creating a Group Fee

- Accessing the Fee Method Form
- Creating the New Fee Method with the Group Fee

Accessing the Fee Method Form

To access the fee method form:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Kinds and Categories**.



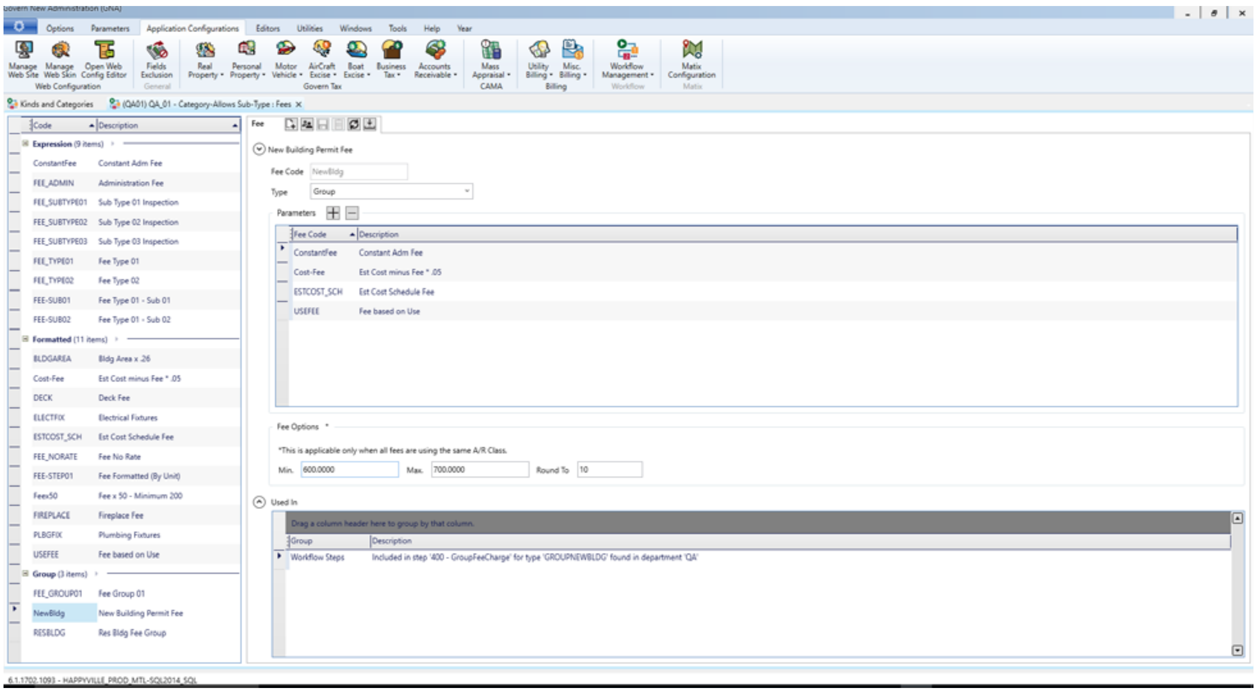
All existing Kinds are listed in the tree view on the left.

3. Select **QA - QA-Permit Test Scenarios**.
4. Select the **Categories** tab.

   The categories are listed in the tree view on the left.

5. Select the **QA_01 - Category-Allows Sub-Type**.
6. Click the **Edit Fees** action button at the top of the form.

   The Fee Method Editor opens.

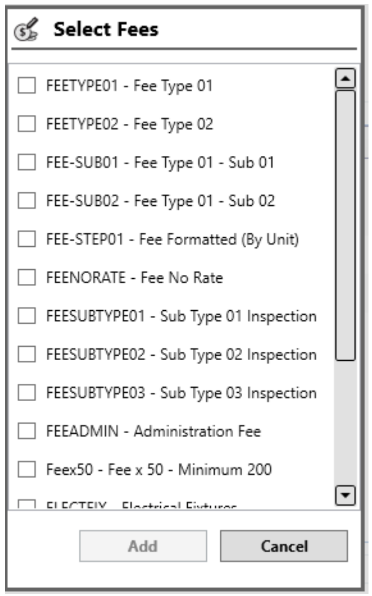


Creating the New Building Permit Group Type Fee

To create the new fee method with the validation table:

1. Enter **NewBldg** in the **Fee Code** parameter.
2. Click the drop-down arrow to expand the description fields.
3. Enter **New Building Permit Fee** in the **Short** and **Long Description** fields.
4. Select **Group** from the **Type** drop-down list.
5. Click the Plus icon.

   This opens the Select Fees window.



6. Select the fee methods that you want to add.
7. Click **Add** on the **Select Fees** window.
8. Enter values in the **Min**., **Max**., and **Round To** parameters if required.
9. Click **Save** on the Fee Method window.

Adding the Group Fee to an Activity Step

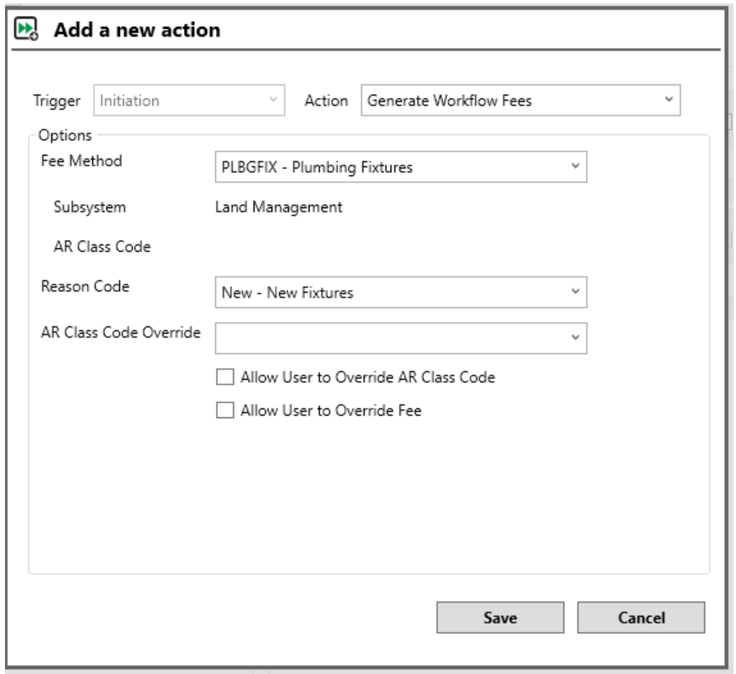
Fees are added to workflows on the Activity Steps.

To add a fee to a workflow:

1. Launch GNA.
2. Select **Application Configurations** > **Workflow Management** > **Departments**.
3. Select **QA - QA-Permit (Test Scenarios)**.
4. Click the **Step** icon.
5. Select **100 - Fee Step**.
6. Select the + icon to add a status.
7. Select **True** from the drop-down list and enter **999** in the **Go to** field.

   This opens the **Add a new action** form.

The **Trigger** parameter is automatically populated.



8. Select **Generate Workflow Fee** from the **Action** drop-down list.
9. Select **FEE_TYPE01 - Fee Type 01** from the **Fee Method** drop-down list.
10. The **Subsystem** parameter is automatically populated.
11. Select **02 - A/R Reason 02** from the **Reason Code** drop-down list.

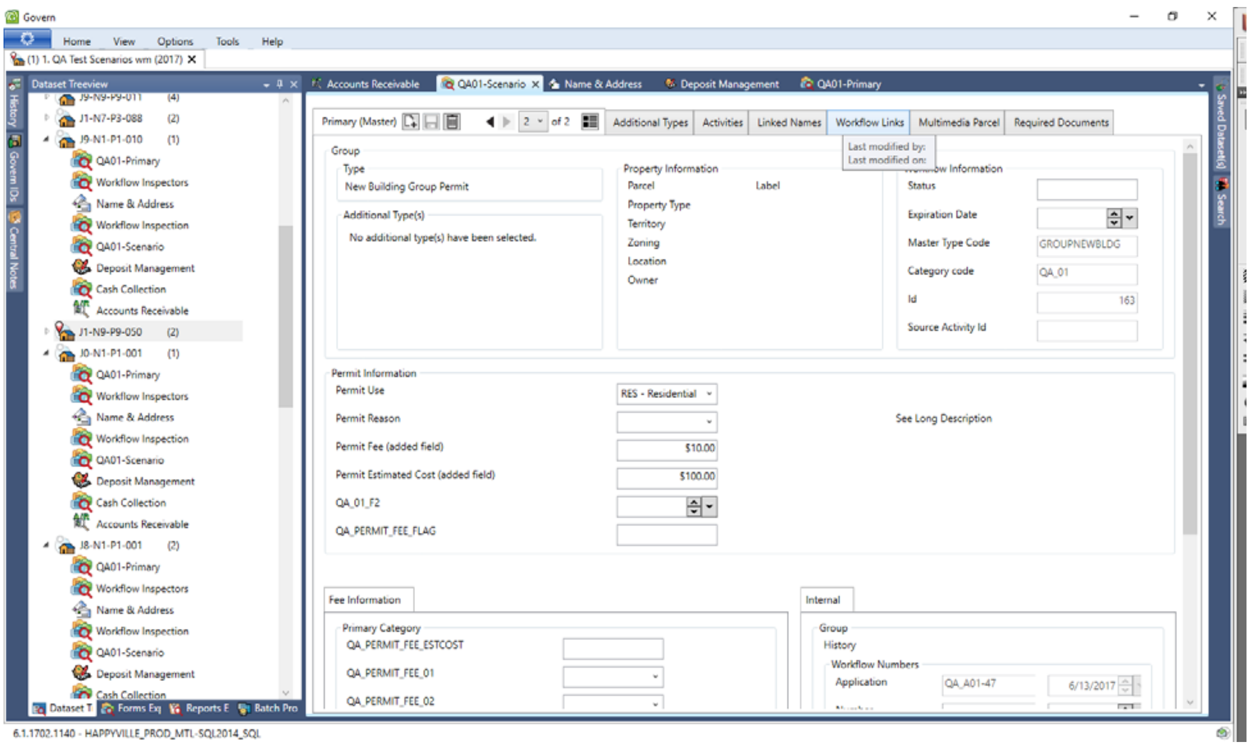
    This is an optional field.
12. Select **wm_L2_Bill - SubSys L2 - Billed** from the **A/R override** parameter if users can over the selected A/R Class.
13. Select **Allow User to Override Fee**.
14. Click **Save** on the **Edit action** window.
15. Click **Save** on the **Activity Setup** window.

Launch the Workflow

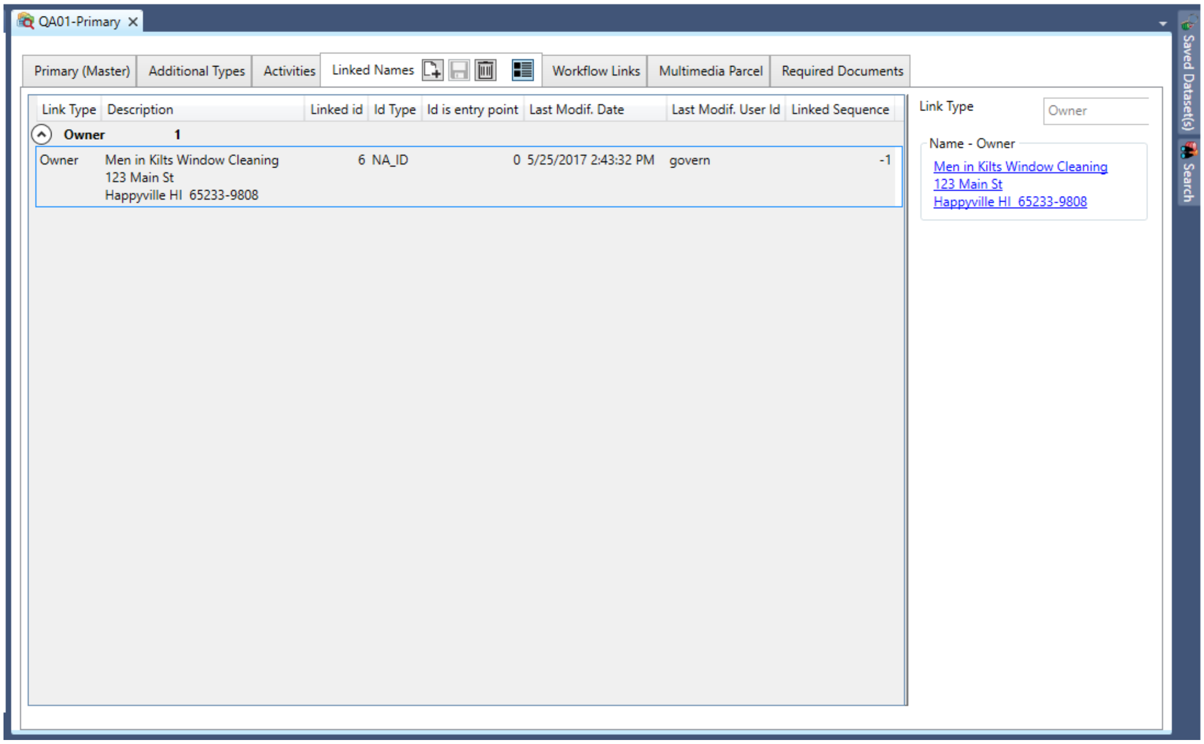
To test the fee in a workflow:

1. Launch Govern.
2. Open the **QA - Test Scenarios - wm Profile**.

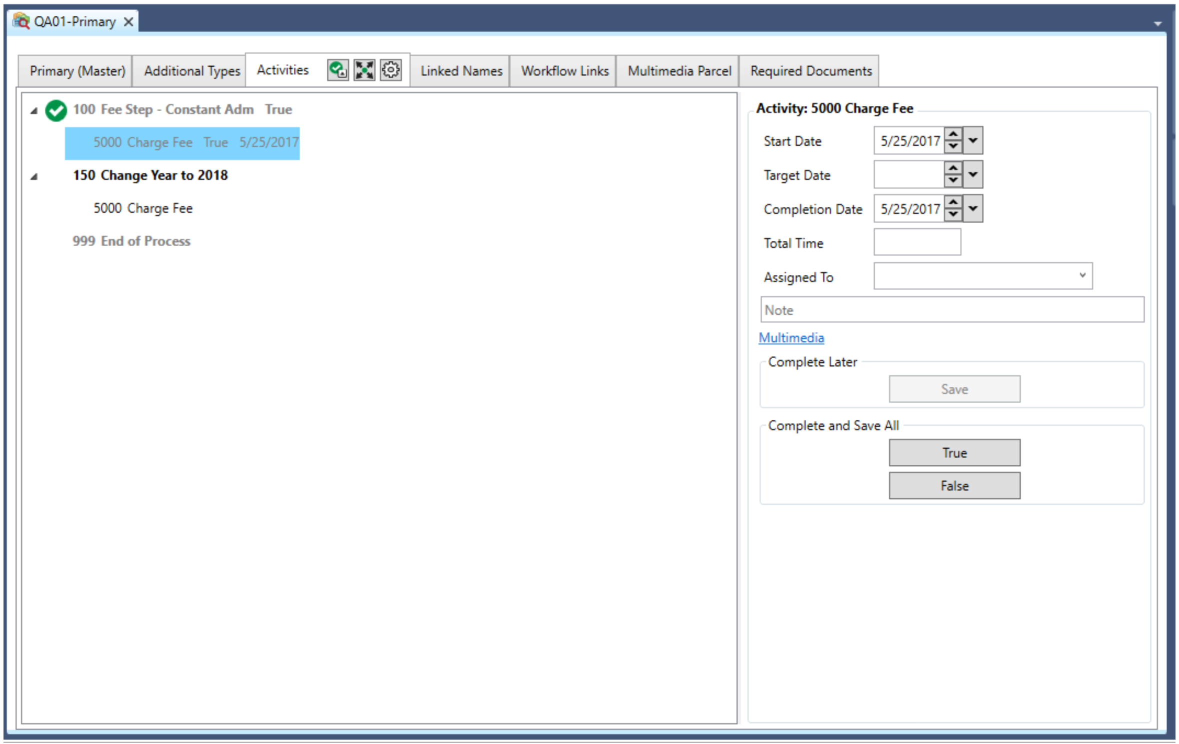
3. Open the **Primary (Master)** form.



4. Perform a search for a property record and add the results to the tree view
5. Click **New** to create a new workflow record.
6. Select **New Building Group Permit** from the **Type** drop-down list.
7. Click **Save**.
8. Select the **Linked Names** tab.



9. Click **New**.
10. Select **Owner** from the **Link Type** drop-down list.
11. Select the name showing under **Suggested Links**.
12. Select the General tab.
13. Enter the parameters used in the group fee:
14. Select the year 2017 from the History tab.
15. Select RES - Residential from the Permit Use drop-down list.
16. Enter 10 for the Permit fee.
17. Enter 100 for the Permit Estimated Cost.
18. Select the **Activities** tab.



19. Click **True** beside the first step.

    A fee of **$600.00** is charged.

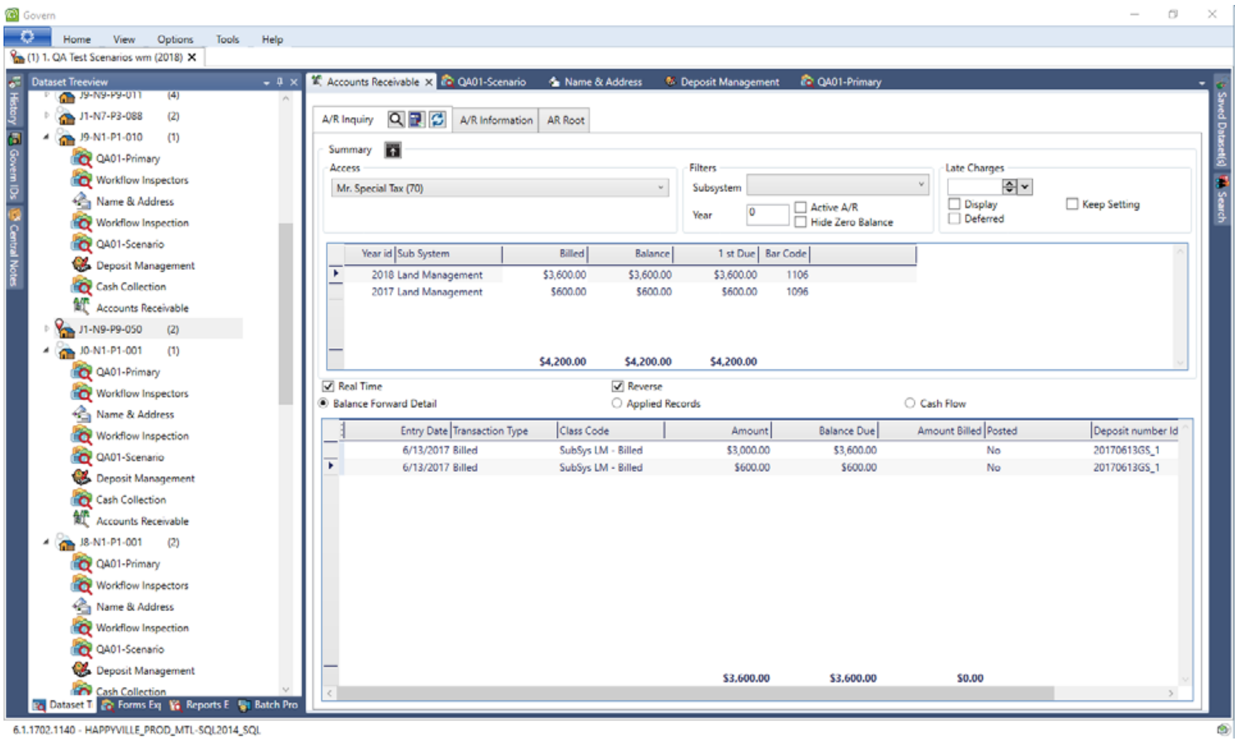
20. Change the year to **2018**.
21. Select the **Activities** tab.
22. Click **True** beside the first step.

    A fee of **$605.00** is charged.

Viewing the Fee in A/R Inquiry

To view the fee in A/R Inquiry:

1. Open the A/R Inquiry form for the parcel.
2. Perform a search and select the record corresponding to the linked name.
3. Select the record corresponding to the year that you want to view in the Summary section.



The detail of the record is displayed.