YORK REGION SEWER USE BYLAW SERVICES

Agency Portal
Reference Guide

Version: 1.7

February 1, 2015

Website Access

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1 Overview of York Region Sewer Use Bylaw Services

York Region Sewer Use Bylaw Services allows the Region's staff, Local Municipalities' employees, and the Public to communicate with one another utilizing a website accessible from the internet. For purposes of this guide, we will be discussing the functions and responsibilities tied to tasks the Region's users will be expected to perform on a daily basis. The predominant task that will be performed by the Region's staff will be reviewing and approving online submissions received from the public or the Local Municipalities.

2 York Region Sewer Use Bylaw Services Agency Portal Home

York Region Sewer Use Bylaw Services Agency Portal Home site provides many dashboards to allow the agency user to have direct "quick access" to the desired functional areas to perform his or her daily job functions.

Figure 1: York Region Sewer Use Bylaw Services Agency Portal Home Site

Below are the brief functional descriptions of each dashboard block:

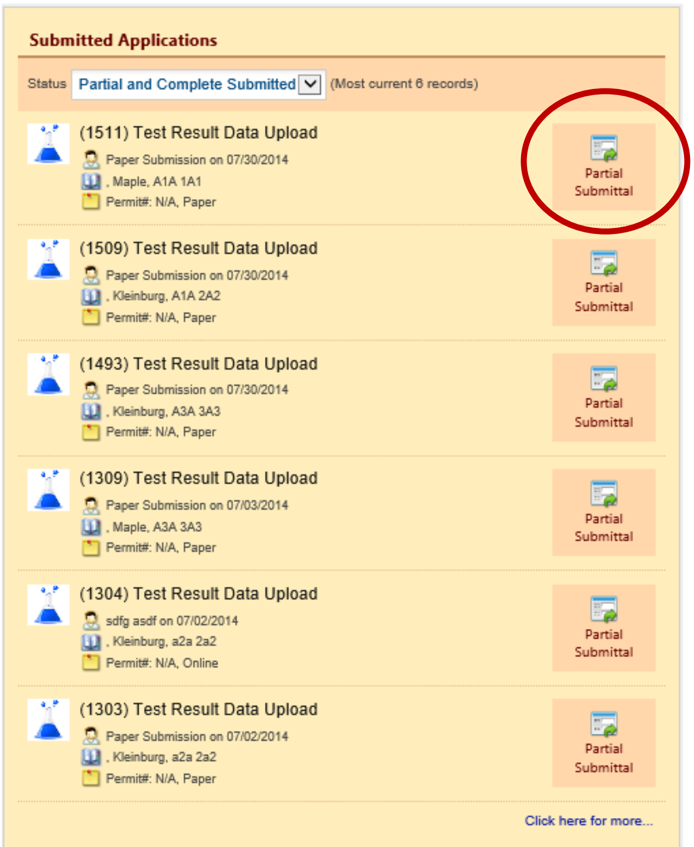
1. **Start New Application:** this block allows an agency user to create a new application
2. **Unauthorized Public Users:** this block lists the new public users that are requesting to be activated so they can submit applications.
3. **Submitted Application:** this block displays a summary of submitted applications
4. **Agency Current User Login List:** this block shows a list of currently logged in users
5. **Message center:** this blocks provides short-cuts to many useful York Region Sewer Use Bylaw Services functional areas
6. **My Queries:** shows the list of available Agency queries that can be run to review data in iPACS

3 Manage Application

The Sewer Use Bylaw Services Agency system allows the agency user (with adequate application access permissions) to review, update, edit, approve and issue submitted applications.

Let's use one example submitted application to take you through a typical permit application management lifecycle. From the Sewer Use Bylaw Services Portal Home page, the agency user simply clicks a selected submitted permit application icon from the "**Submitted Applications**" dashboard area to access this recently submitted permit application.

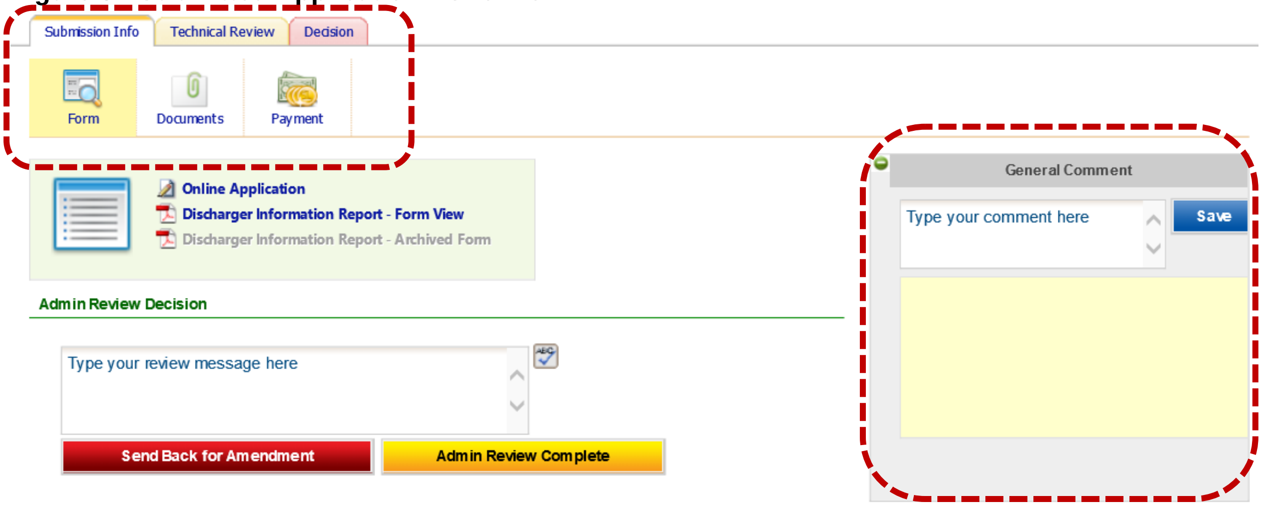
Figure 2 - Open Submitted Application



Once the user has clicked on the selected application, the user can receive an overview of the current application status (from the status bar) and work on the current case by accessing the two tabs displayed on this page (see Figure 3):

- Submission Info (Tab)
- Technical Review (Tab)
- Decision (Tab)

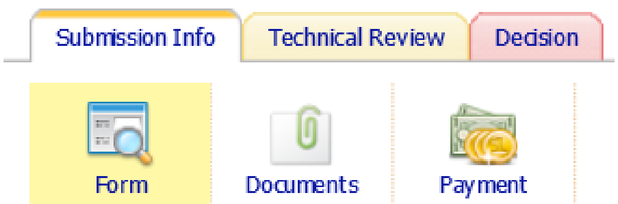
Figure 3 - Submitted Application - Overview



3.1 *Submission Info*

At any of the Review/Decision stages (such as Administrative review or a Technical review), "Submission Info" tab allows the reviewer(s) to fully access user submitted data. Under this tab, it consists of three sub-tabs:

Figure 4: Submission Info tab



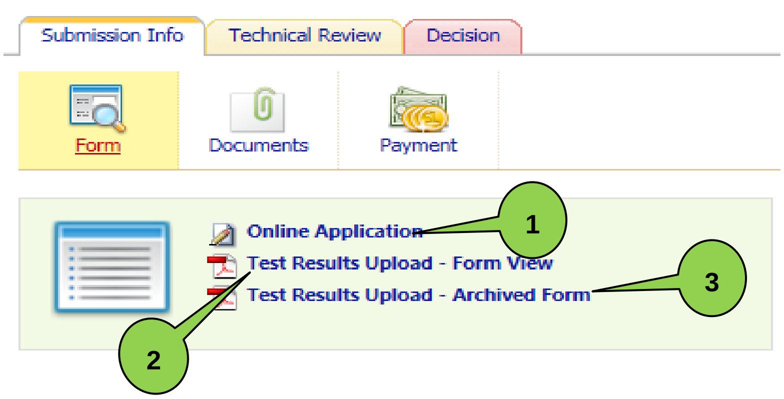
- **Form**: This tab includes all original applicant submitted data (Form(s)), in addition to Project Site Location; Applicant; and possible Authorized Representative.

- **Documents**: This tab collects all attachments submitted by the applicant or entered by the reviewer(s)

- **Payments:** This tab stores required fees for each application as well as the payments received which apply to those fees.

3.1.1 Form

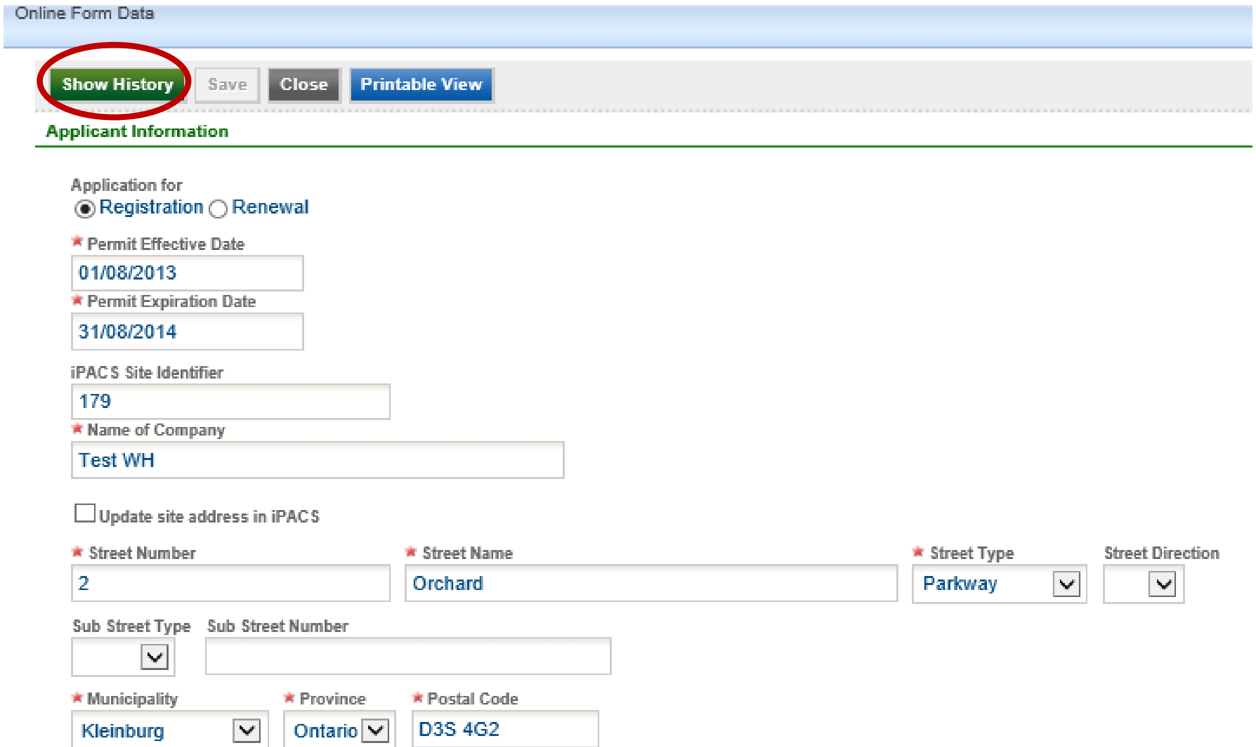
Figure 5: Submission Application - Form Tab



3.1.1.1 Steps to review an application

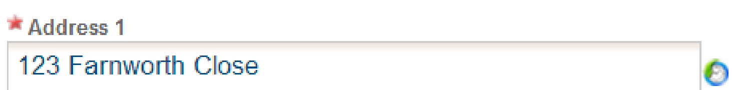
Under the Form tab (screen), the agency user has the ability to review a submission by clicking (Online Application).

Figure 6- Submitted Application - Application Review



- Agency user can review the user submitted application data

  Agency user can review history data by click (Show History) button. Once agency user clicks the (Show History) button, system will add ( ) button icon next every text field which has been modified after submisison. The agency can view all the history data by clicking ( ).



- There are four (4) different types of applications that can be received from the public. Please take note of the special attributes of each form which dictate particular checks that should be considered when reviewing that type of application.

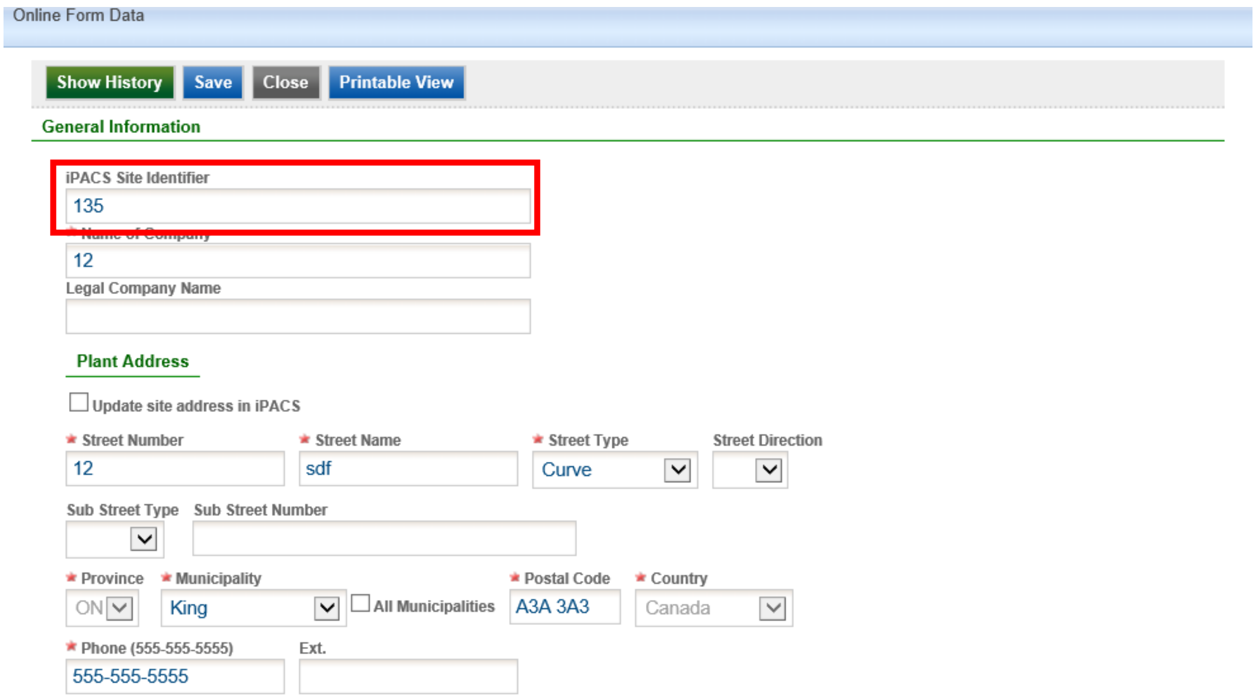
(1) Discharge Information Report (DIR)

- Confirm if the application relates to an existing iPACS facility or is a new facility
  - The highlighted field in Figure 7 is visible when you review the online application.
  - This field would be prepopulated with the iPACS Facility ID if it is already known based on the user who submitted the application. If this field appears empty, please ensure if

this already represents an existing Facility in iPACS. If so, please enter the Facility ID in this field.

- If you approve the form with this field empty, iPACS will create a new Facility record to link to this application.
- A new General Permit and Permit/Plan Limit will need to be setup for this newly created Facility record in iPACS. Please refer to Section 2.4 in the EME iPACS Instruction Manual (edoc #5506219) for instructions on how to create a General Permit and to associate Sewer Use Bylaw limits to the permit.

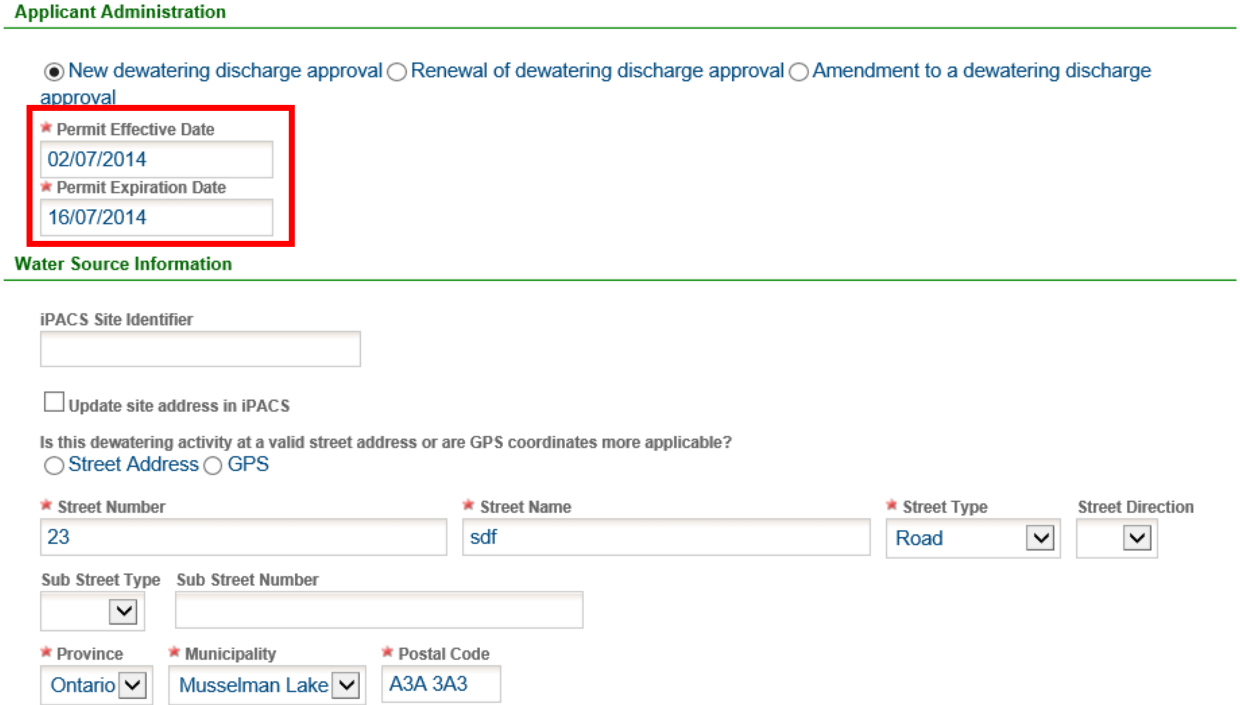
Figure 7: DIR Facility Identification



(2) Dewatering Discharge Approval Application

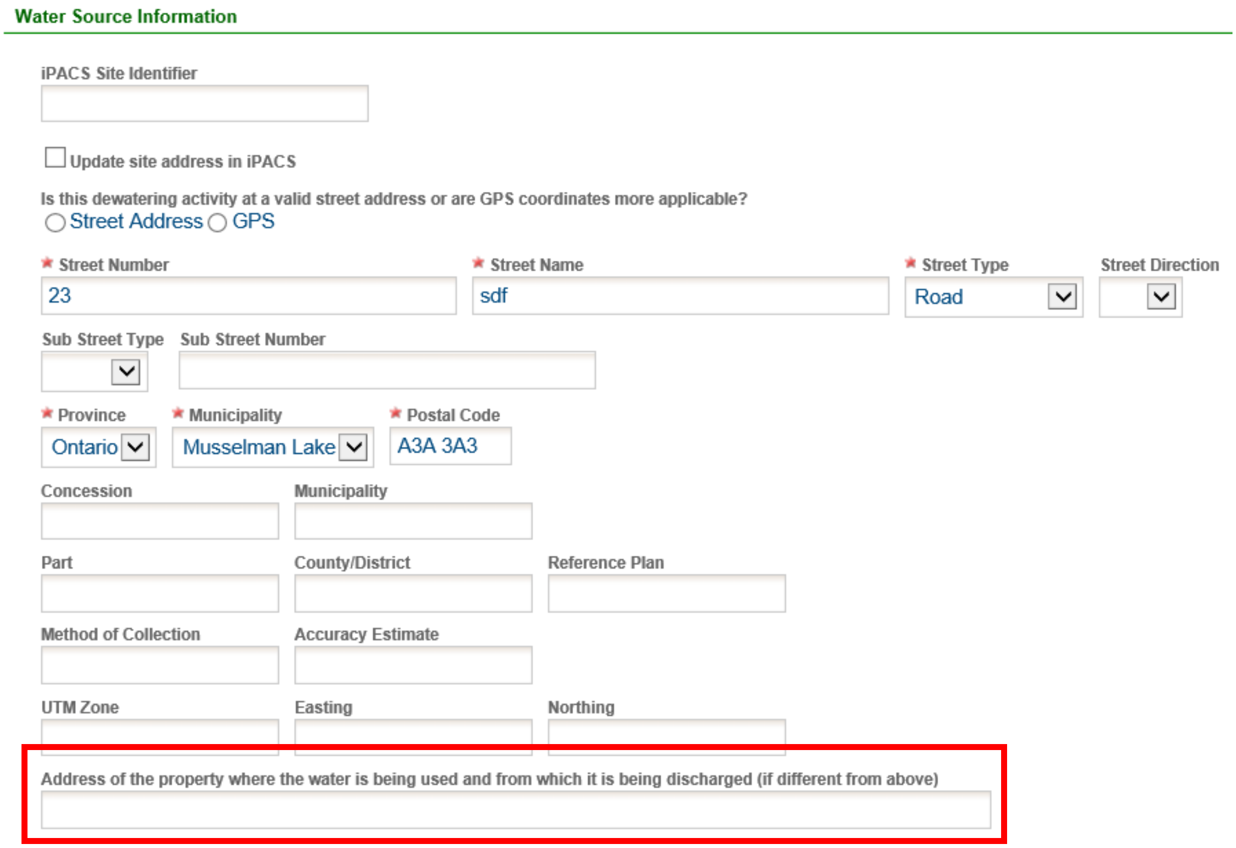
- Confirm the appropriate Permit Effective and Expiration Dates
  - Unique to the Agency user's application review, you are presented with the two required date fields which represent the start and end date of the allowable dewatering discharge (see Figure 8).
  - These dates should match the expectation of when the applicant is allowed to start discharging and when they must finish discharging.
  - These dates will be transferred back to iPACS when creating the linked Permit record and these will appear as the Permit Effective and Expiration Dates.
  - The Permit that is automatically created is also automatically approved since review of the application has occurred in the York Region Sewer Use Bylaw Services website.
  - The Permit/Plan Limit will need to be manually set up for this newly created permit in iPACS in order for the Auto-compliance Check to work properly. Please refer to Section 2.4.4 in the EME iPACS Instruction Manual (edoc #5506219) for instructions on how to associate Sewer Use Bylaw limits to the permit.

Figure 8: Dewatering Permit Dates



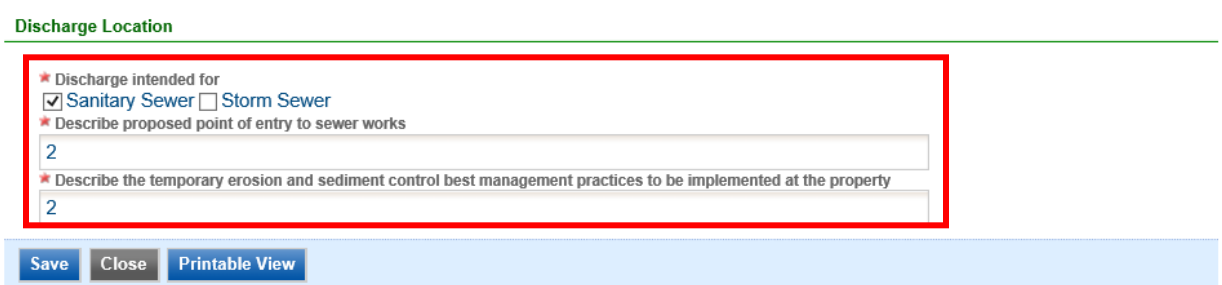
- Enter iPACS Facility Name as “Address of the property where the water is being used and from which it is being discharged (if different from above)”
  - Please use the above mentioned field which is highlighted below to dictate what the Facility Name in iPACS should be created as / updated to (see Figure 9).

Figure 9: Dewatering Facility Name



- Create Sample Locations
  - The last set of questions on the Dewatering application are used to create new sample locations in iPACS for use in tracking sample results received and applying by-law limits to on the associated permit.
  - Up to two sample locations can be created from one Dewatering submission by clicking one or both of the “Sanitary Sewer” and “Storm Sewer” check boxes in the Discharge Location section.
  - For each sample location to be created, the “Describe proposed point of entry to sewer works” field is used to determine the Sample Location Name and Sample Location Description values in iPACS respectively (see Figure 10)

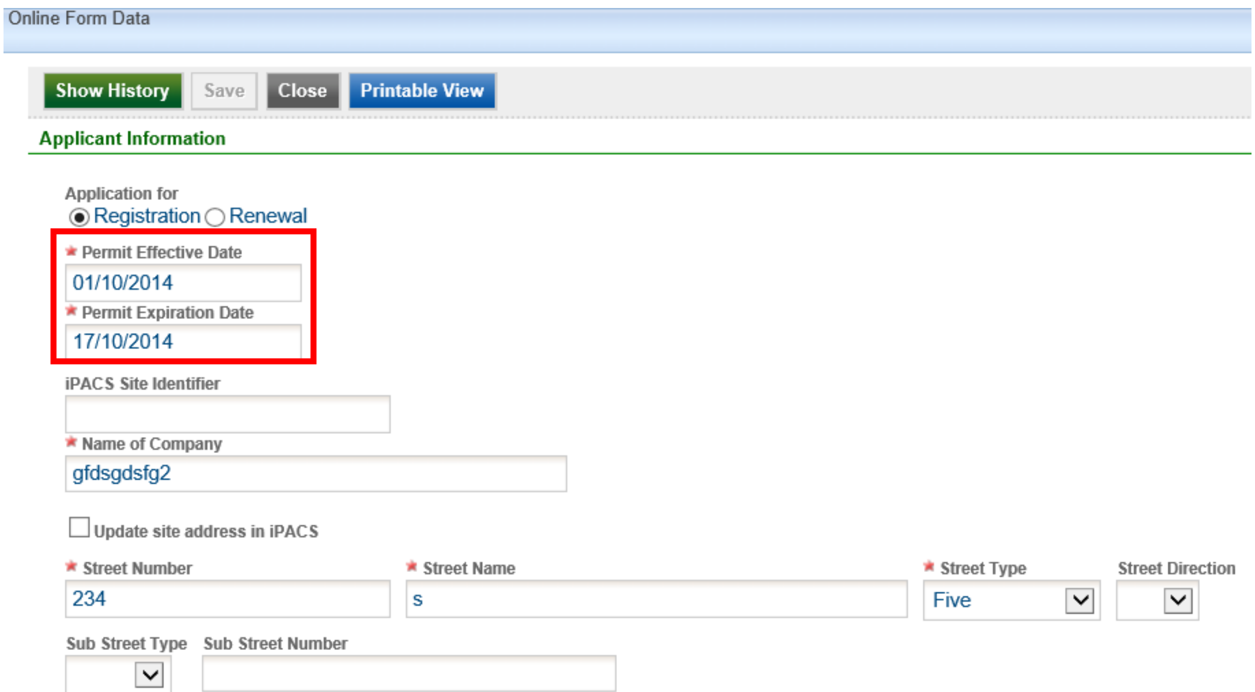
Figure 10: Dewatering Sample Locations



(3) Waste Hauler Application

- Confirm the appropriate Permit Effective and Expiration Dates
  - Unique to the Agency user's application review, you are presented with the two required date fields which represent the start and end date of the waste haulers ability to haul waste to one of the Regions receiving sites (see Figure 11).
  - These dates should match the expectation of when the hauler is allowed to start and end their hauling activities. Most likely, these should run form January 1st of one year to December 31st of the same year.
  - These dates will be transferred back to iPACS when creating the linked Permit record and these will appear as the Permit Effective and Expiration Dates.
  - The Permit that is automatically created is also automatically approved since review of the application has occurred in the York Region Sewer Use Bylaw Services website.
  - The Permit/Plan Limit will need to be manually set up for this newly created permit in iPACS in order for the Auto-compliance Check to work properly. Please refer to Section 2.4.4 in the EME iPACS Instruction Manual (edoc #5506219) for instructions on how to associate Sewer Use Bylaw limits to the permit.

Figure 11: Waste Hauling Permit Dates


Online Form Data

Show History | Save | Close | Printable View

Applicant Information

Application for
Registration Renewal

* Permit Effective Date
01/10/2014
* Permit Expiration Date
17/10/2014

iPACS Site Identifier

* Name of Company
gfdsgdsfg2

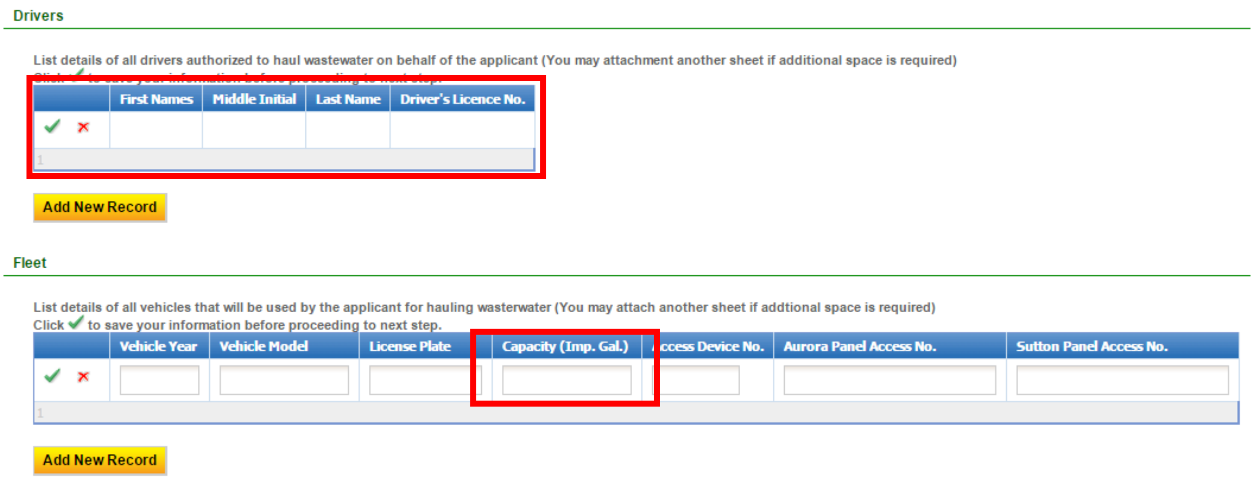
Update site address in iPACS

* Street Number: 234
* Street Name: s
* Street Type: Five
Street Direction

Sub Street Type
Sub Street Number

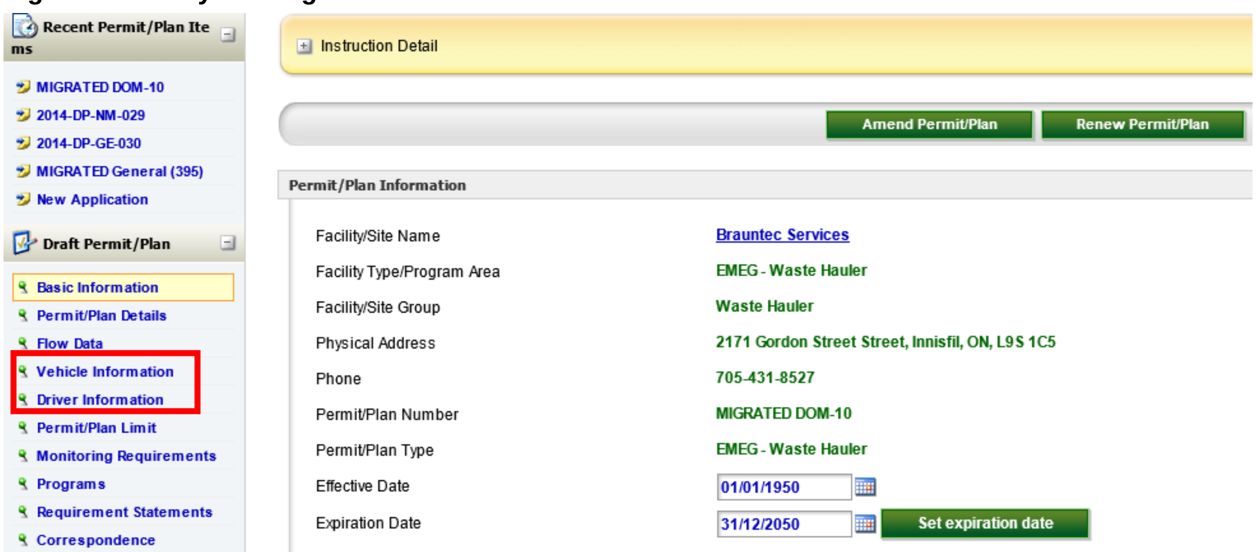
- Confirm the driver, fleet and capacity information is reported
  - Towards the bottom section of the application are two grids which allow the input of multiple records for each question. The two we are focusing on here are the "Drivers" and "Fleet" grids (see Figure 12).
  - In the Drivers grid, please ensure that the data is complete and in the correct format.
  - In the Fleet grid, please ensure that the data entered is complete and seems accurate. Please make sure that the Capacity value for each vehicle is present and in the correct units (Imperial Gallons).

Figure 12: Waste Hauler Drivers and Fleet



- ➢ Ensure that after the application is approved, that the drivers and vehicles transfer back to iPACS correctly.
  - Once the application is approved, log into the iPACS system and search for the newly created permit for this facility. In the new waste hauler permit, review the Driver and Vehicle sub-module to ensure a complete data transfer to iPACS has occurred correctly.

Figure 13: Verify Hauling Permit Transfer to iPACS



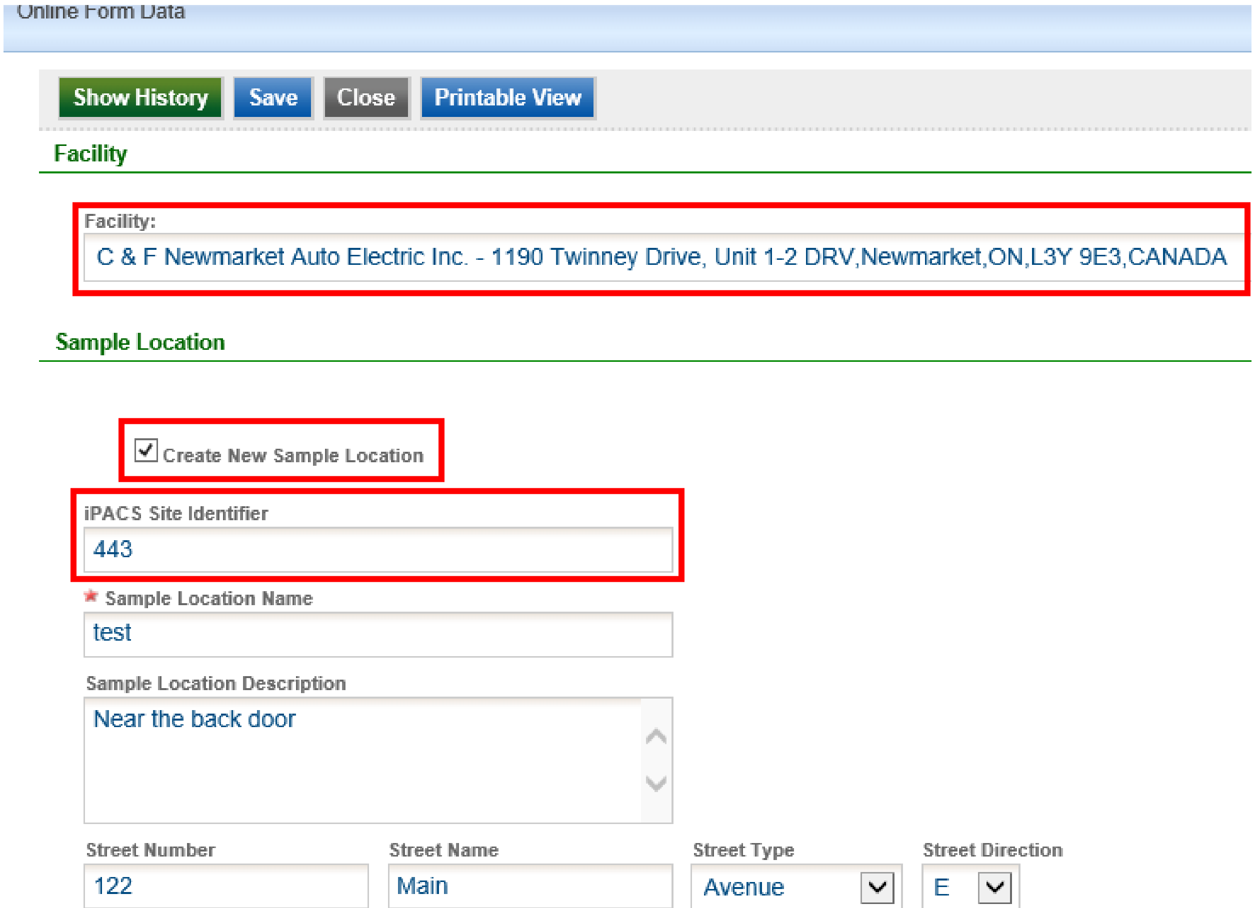
(4) Test Results Upload

- ➢ Ensure Facility and Sample Location are chosen correctly with relation to the submitting user.
  - When reviewing test results that have been received, it is critical to ensure that the facility and sample location have been chosen correctly. If a new sample location is being created, it is also important to ensure that it truly is a new sample location rather than an existing one for the facility.
  - When creating a new sample location, like the other forms, you will be presented with an iPACS Site Identifier field. If that field is left empty, a new facility will be created along with

this new sample location. A new General Permit and Permit/Plan Limit will need to be setup for this newly created Facility record in iPACS. Please refer to Section 2.4 in the EME iPACS Instruction Manual (eDOCs #5506219) for instructions on how to create a General Permit and to associate Sewer Use Bylaw limits to the permit. If a Facility ID is entered, the new sample location will be associated to that existing facility instead.

- Also, when creating a new sample location, if the related facility needs to be changed, please update the value in the iPACS Site Identifier field rather than the Facility dropdown at the top of the form. Once the form is saved, the Facility dropdown will refresh to show the correct information linked to the ID just entered.

Figure 14: Test Results Upload Facility and Sample Location Selection



3.1.1.2 Form View

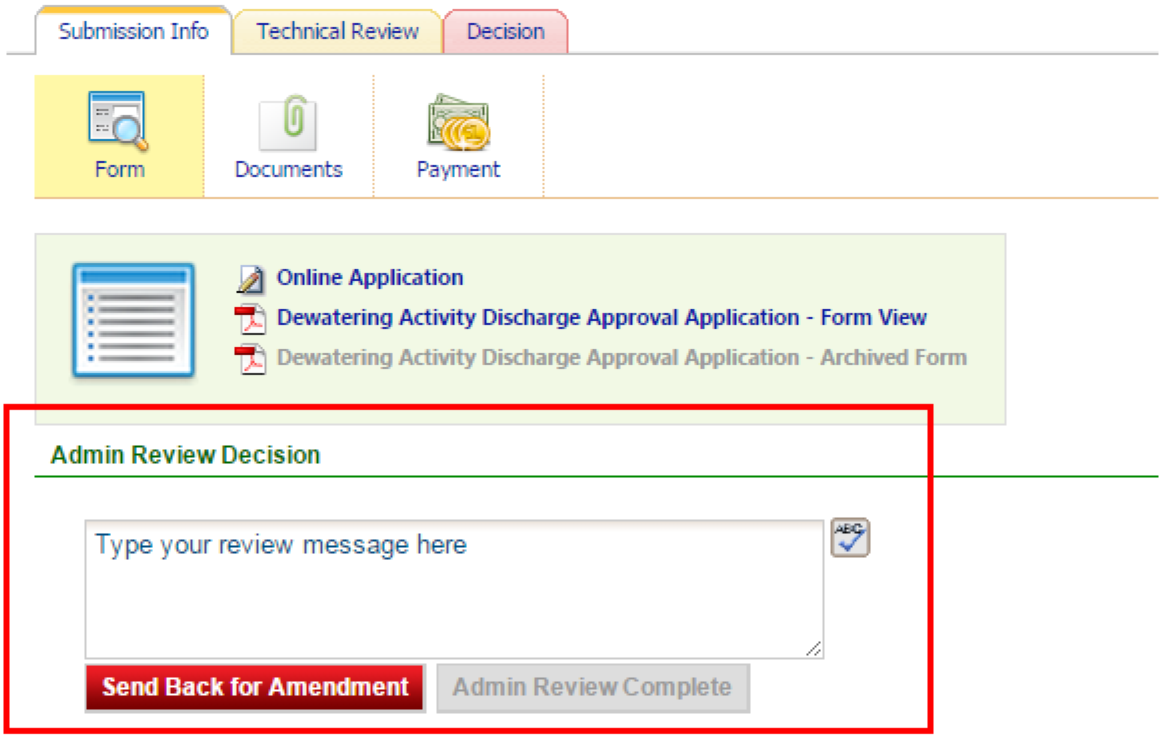
(Wastewater Hauler Registration Application - Form View) Form View allows agency user to download submitted application in subcode Techsheet view(PDF).

3.1.1.3 Archived View

(Test Results Upload - Archived Form) Archive form) allows agency users to review the original application and the form will be visible if agency users made changes to the information on the application and clicked “Save & Close”.

3.1.1.4 Admin Review Decision

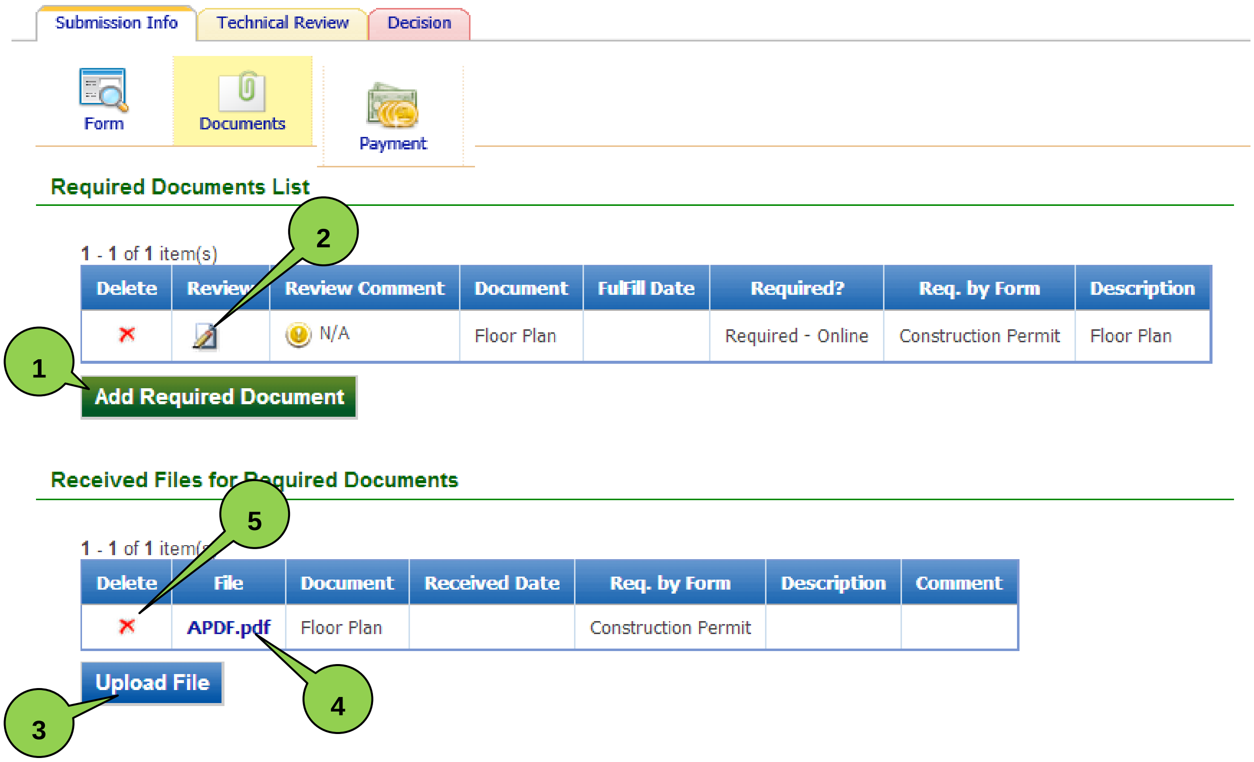
If York Region requires more information from the owner of the application, agency users can send a message by typing detailed comments under the Admin Review Decision section and click the Send Back for Amendment button. Email and a mobile message will be sent to the owner of the application. Once all required documents and information have been received, agency users can complete the admin review by clicking the Admin Review Complete ,button, so the Tech Review Complete button under the Technical Review Decision section will become activated.



3.1.2 Documents

Under the Documents tab, an agency user can review and manage the documents submitted by an applicant.

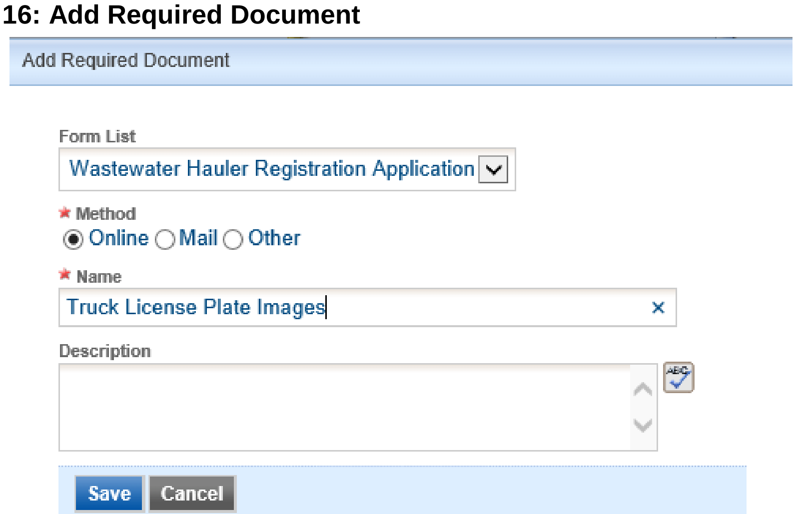
Figure 15: Review Documents



Here are brief descriptions of typical actions that may be carried out by agency users (as marked numbers shown in the above Attachment screen section):

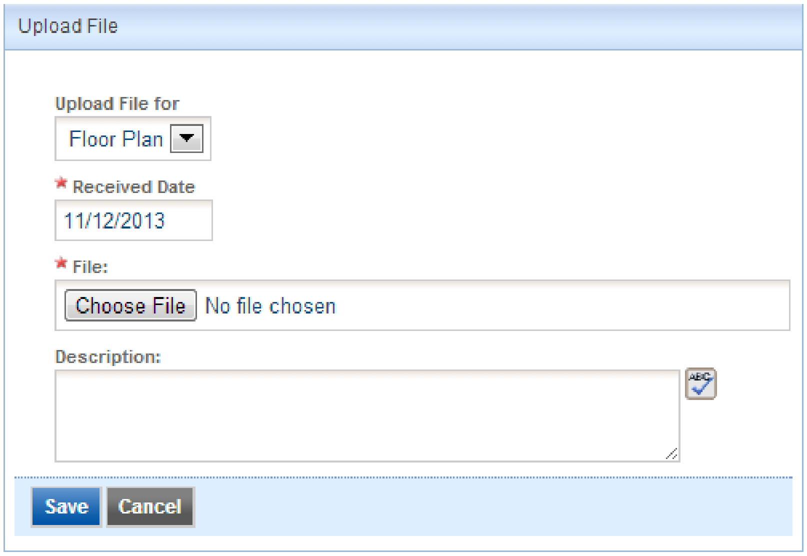
1. An agency user is able to make required documents to be submitted for the current submission. System allows agency user to define document type, Method, name and description for the required documents. When a new required document is added to a submission, the applicant is immediately sent an email alert letting them know of the new requirement and to log onto the York Region Sewer Use Bylaw Services website to upload the document.

Figure 16: Add Required Document



2. An agency user can update/review required documents list by clicking ( ) button.
3. An agency user can upload files (received from applicant) as attachment by clicking (Upload File) button. Before uploading document to the system, an agency user has to provide document from the dropdown, received date, attachment and description (optional).

Figure 17: Upload Received Attachment



4. An agency user is allowed to download uploaded document by clicking document name ex: "APDF.PDF"

Figure 18: Open/Delete Submitted Attachment

1 - 1 of 1 item(s)

Delete	File	Document	Received Date	Req. by Form	Description	Comment
✗	APDF.pdf	Floor Plan		Construction Permit		

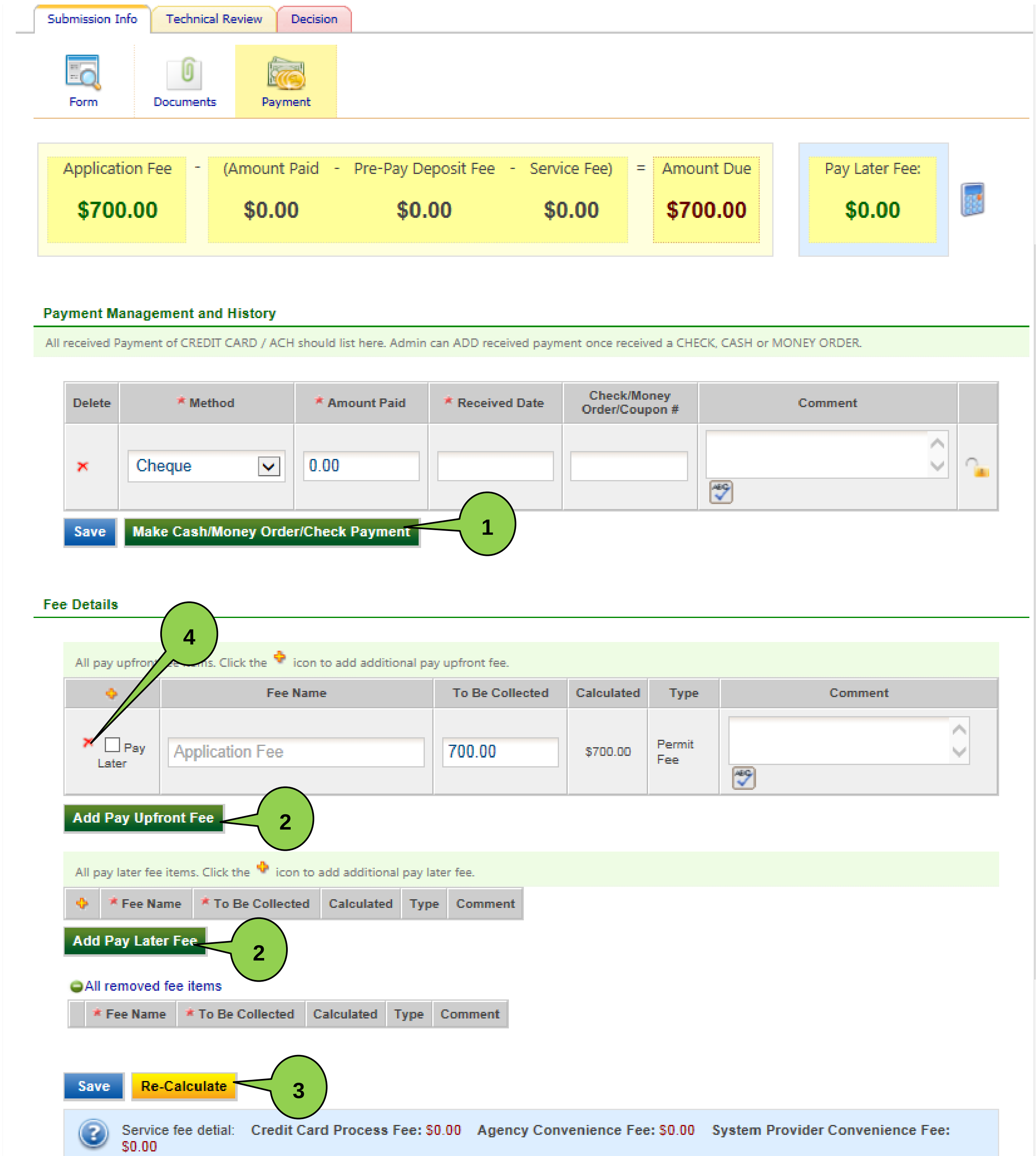
5. (✗) button allows agency user to delete uploaded document from the sytem.

3.1.3 Payment

Under this section an agency user can review the required fee(s), add additional fee(s), and delete unnecessary application fees.

Here are brief descriptions of typical actions that may be carried out by an agency user (as marked numbers shown in Figure 19):

Figure 19: Reviewing Payment



1. After received fee
   a. Click the **Make Cash/Money Order/Check Payment** button which will add a new record to the Payment Management grid directly above.
   b. In most cases, the “Method” should remain “Cheque”.
   c. Pleaes ensure to enter at least the Amount Paid and the Received Date in the grid. The Check Number and Comments are option data entry fields.

   d. Once satisfied with the entry, click the 

 button to confirm the payment. When this button is clicked, the applicant will receive an email notifying them that the payment has been received and the amount has been applied to this application.

2. An agency user reviews the Fee Details and has the flexibility to add additional fee(s) by clicking the 

 button or the 

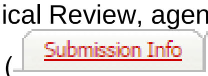
 button.
   a. The Pay Upfront function requires payment before the application can be approved.
   b. The Pay Later function allows the payment to be received after the application has been approved.
      i. This is a much less used function as most applications require an up front application fee.
   c. Once selecting either of these buttons, the user must select the appropriate Fee Group, Fee Item, Fee Type, Fee Name, and To Be Collected Amount.
   d. Clicking "Save" finalizes the process and will creates the required payment.
3. If an agency user adds a new fee, click the 

 button, then the 

 button should be clicked so that the Public user will be notified of the increase in payment.
   a. This is performed through an automatic email that is sent as soon as the "Save" button is pressed.
4. To delete a fee, click  icon under the Delete column ("delete" means to remove not applicable fee(s)).

3.2 Technical Review Tab

The Technical Review process will serve as a space for agency users to communicate with LAM users when needs arise. Also, this section is meant to be used such that an agency user has reviewed all content and data related to the submission and deemed is technically accurate and ready for approval. This section is not meant to communicate with the Public at all.

To perform Technical Review, agency user would first review the applicant's submitted data under "Submission Info" (

) tab to verify all required data were entered and received correctly (refer to step 3.1.1.4).

Here are brief descriptions of typical actions that may be carried out by agency user (as marked numbers shown in the above Technical Review screen section):

An agency user could enter a comment at any time during the "Technical Review" process. The default "Comment Template" provided by the York Region Sewer Use Bylaw Services system is "Technical Review Completed"

1. Communicate with LAM User
   a. If a comment is intended to be sent to the associate LAM user, please use the General Comments section instead located on the right-hand side of the page. If the comment box is not visible, please click the  button to expand the comment box.
   b. Once the Comment section is available, enter your comment in the available box and when ready, click the "Save" button. This comment will then be available for review by the LAM User.
   c. This section will also show comments sent by LAM users for this application.
2. Upload file from user under Document list
   a. If a document is received electronically or in the mail from an industry in relation to one of their applications, it should be scanned and uploaded to the application for tracking.

b. In this section of the "Technical Review" screen, you are shown a list of the required and optional attachment.

c. If additional attachments were submitted, please go back to the "Submission Info" screen to add the new type of attachment.

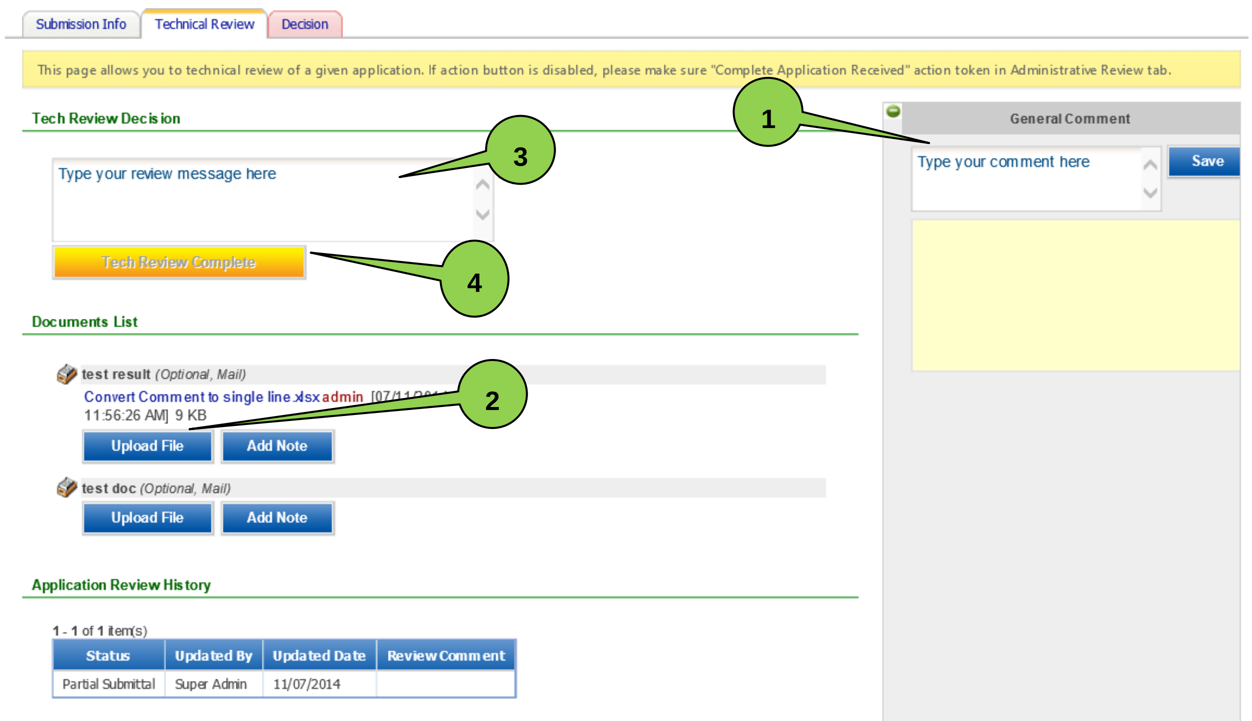
d. If the correct attachment requirement is already displayed on the "Technical Review" screen, click the appropriate Upload File button.

e. Once this is clicked, please complete the Upload File form by browing to the file on your computer and clicking Save.

3. After the Technical Review has been completed, a message indicating this review is done should be entered in the "Tech Review Decision" comment box. This message will be saved in this field with the application. Public users will not be able to see this comment, but LAM users will be able to see it. Only one comment can be saved per application.

4. Click Tech Review Complete button to confirm the "Technical Review Completed" decision

Figure 20: Technical Review

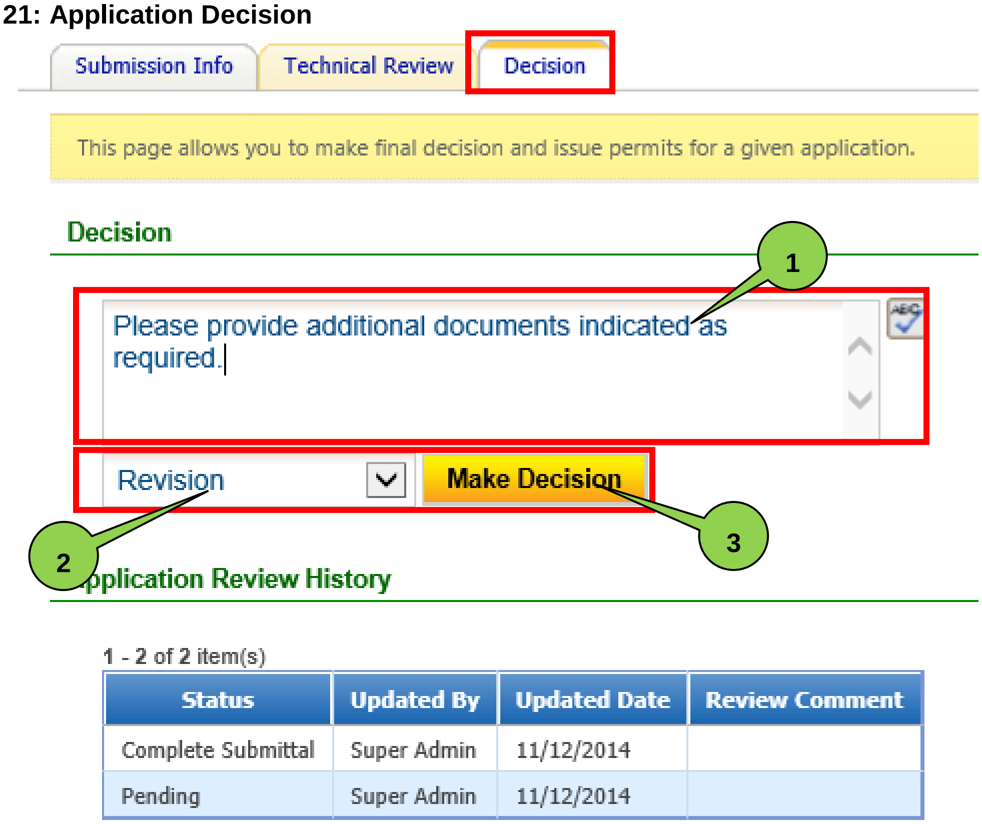


3.3 *Decision Tab*

Under Decision tab, an agency user can review the application package in a global view and perform the following:

1. Provide a comment for each status change for history tracking
2. Change the application status
    a. Approve the application (Approved)
    b. Deny the application (Denied)
3. Make the Decision (Finalize the Status Change)
    a. This button triggers emails being sent to both the agency and Public users about the decision just made.
    b. *To* Send the amendment to public user using "Admin Review Decision"
        i. If after reviewing the application, it is determined that the industry must submit better/more data before the application can be approved, use the "Decision" tab in the Application Review section.
        ii. In this tab, change the dropdown value to "Revision", enter a comment describing why the status is being changed, and click the "Make Decision" button.
        iii. Once this button is clicked, the status of the application is changed and the application is immediately sent an email and text message letting them know of the change and the next required steps they must take.
        iv. Once the public user resubmits the application, it will appear on the Agency website.

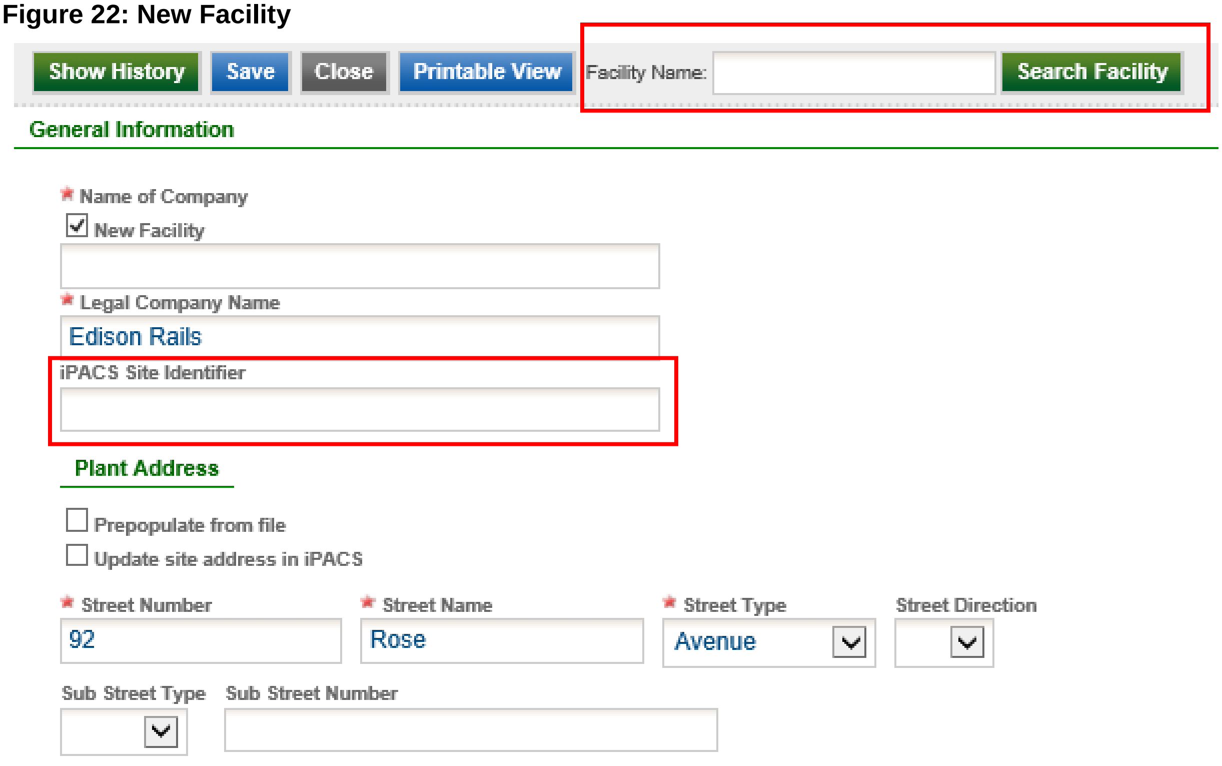
Figure 21: Application Decision



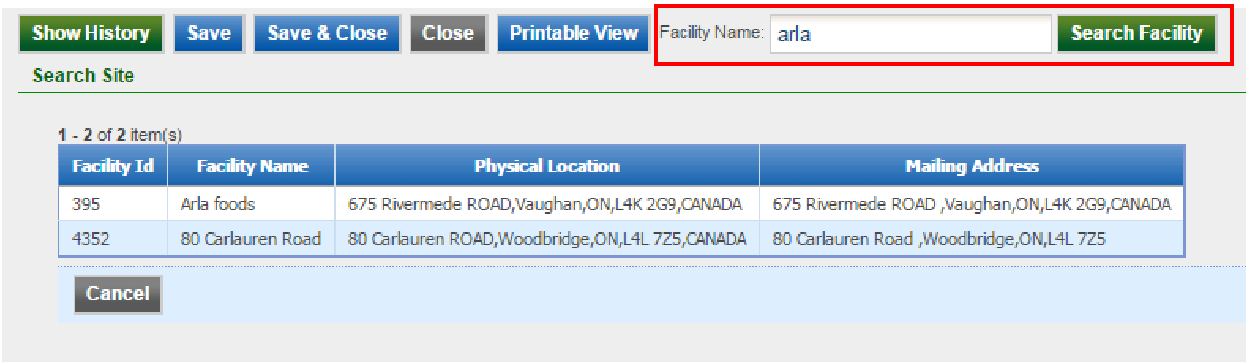
3.4 *After approving an application*

1) When it was indicated that the application relates to a new Facility in iPACS (iPACS Site Identifier field was left empty on the application)
   - Approved application will transfer to iPACS as a new facility. Once the transfer has occurred, the new Facility ID in iPACS will automatically be linked to the Public users account in the York Region Sewer Use Bylaw Services.
   - DIR application and attached document submitted from York Region Sewer Use Bylaw Services will be displayed in a new Inspection record visible in the Inspection module in iPACS. The Inspection Results screen will contain most of the data form the submission.
   - Approved Test result will be transferred to the SMR module in iPACS
   - Approved Hauler and Dewatering application will transferred to iPACS, the pdf form from York Region Sewer Use Bylaw Services will be attached to its permit section and the application results will be saved as the Dynamic Results linked to that permit to preserve their digital format for use in queries and reports.

Figure 22: New Facility

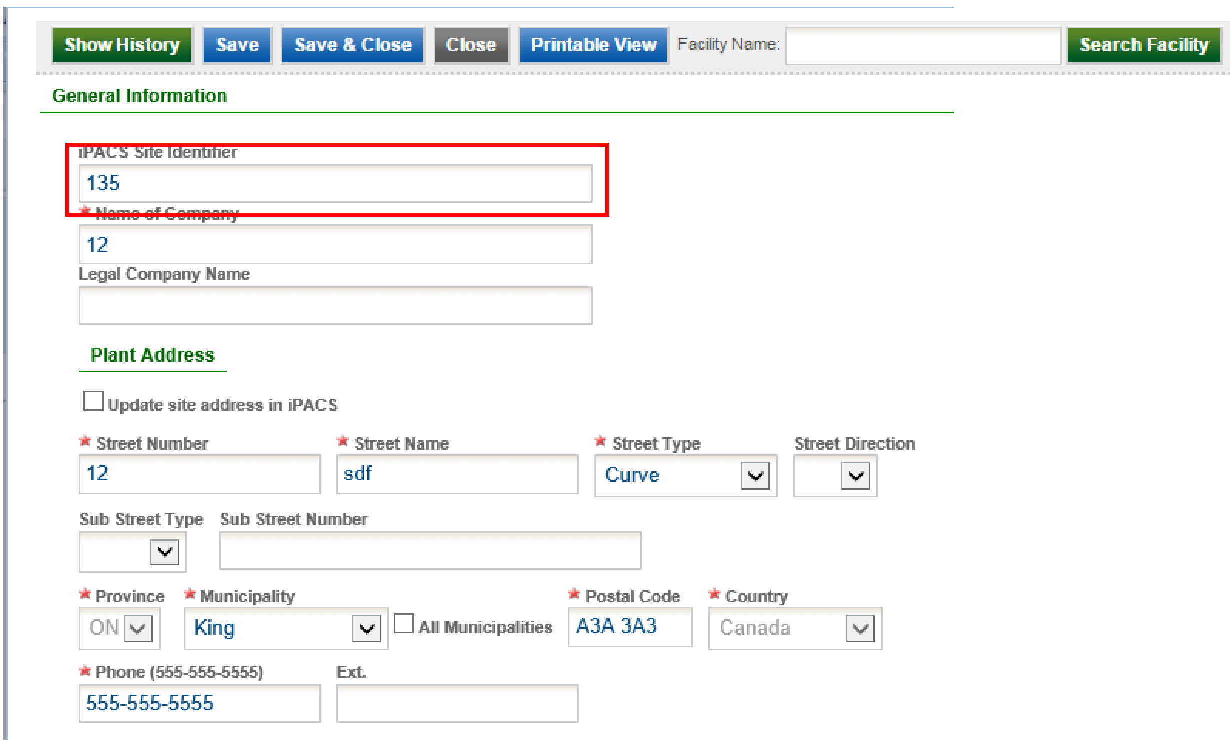


2) When it was indicated that the application relates to an existing Facility in iPACS,
   - Admin can use the search facility ID function by input the facility name in the search box and clicking the **Search Facility** button. Site information from iPACS will be displayed. Check for the accuracy of facility name and address, if it matches to the facility name in the submitted application, then the facility ID will be inputted in the iPACS Site Identifier to update the information of the existing facility in iPACS.
   - Alternatively, the admin can uncheck the “New Facility” checkbox to cause a “Name of Company” dropdown to appear. In this “Name of Company” dropdown, you will see a list of companies that are related to the user who submitted this application.



- Save iPACS Site Identifier field with a value on the application

Figure 23: Existing Facility

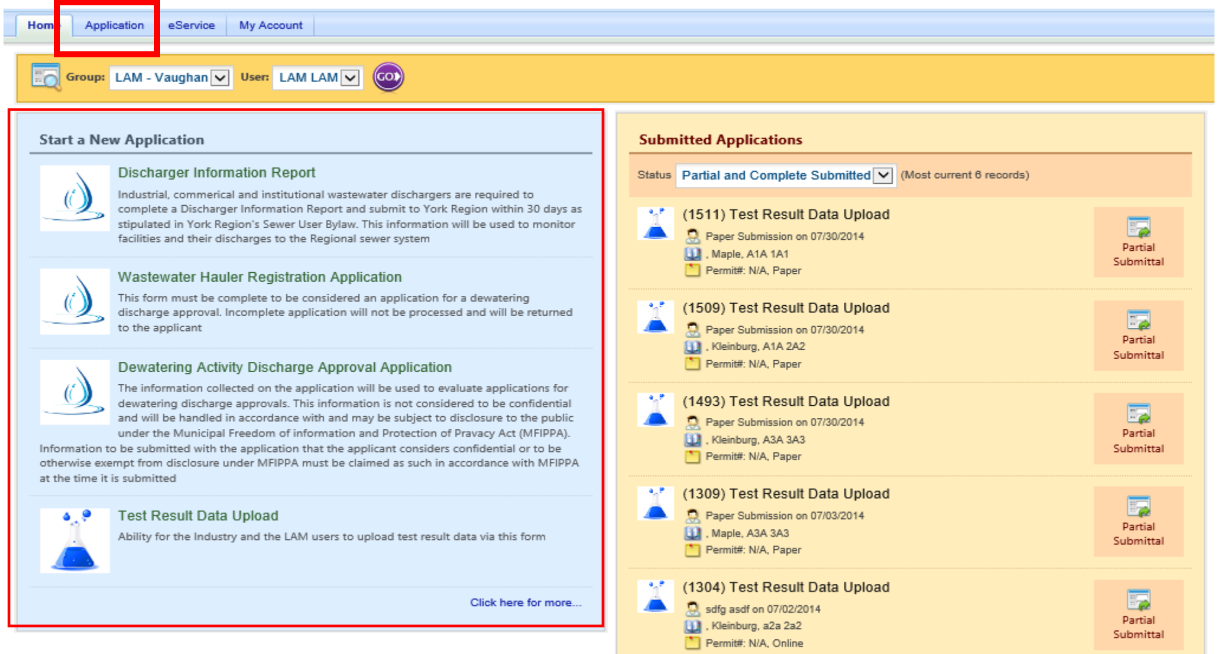


- Ensure to check if the iPACS facility ID is associated with the public user account by view the System Setting/Public Users/Associated Facility of the applicant who submitted that correspondence application.

3.5 *Submit an Application*

If a paper submission is received, agency users have the ability to upload the submission information into the Sewer User Bylaw Service's website on behalf of the public user. To accomplish this, the agency user must choose to start a new application from one of two screens; the home screen- >Start New Application or under the Application module->Create New Application.

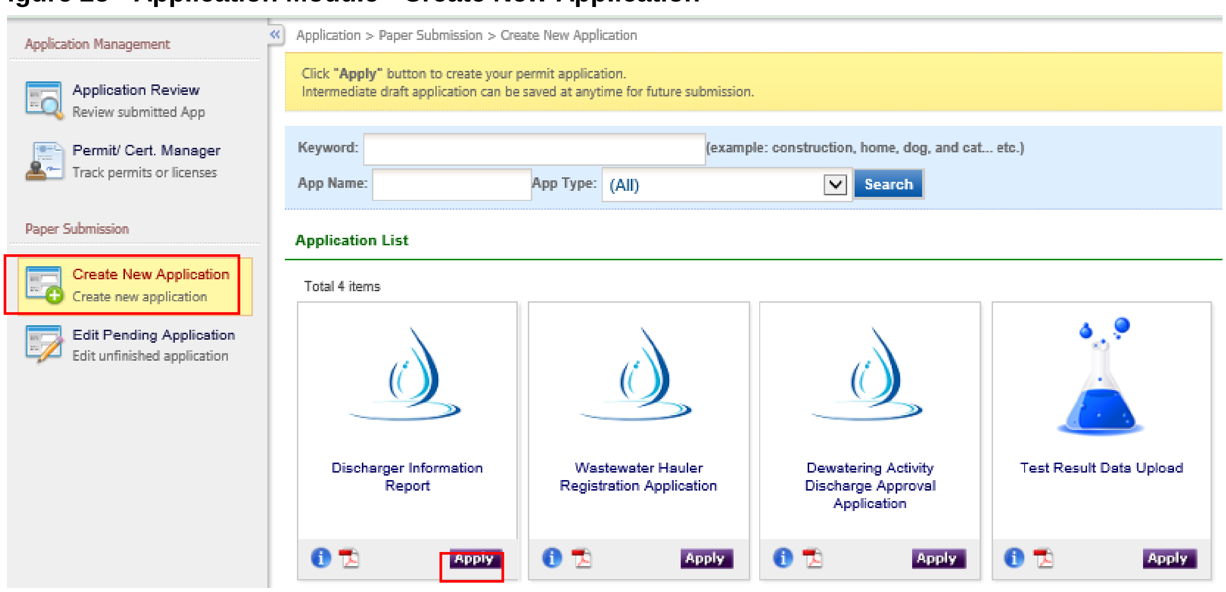
Figure 24 - Home screen - New Application



To reach this second screen, click the Application Module from the top, and then when the page reloads, click the "Create New Application" link on the left-hand side of the page.

The first three application types, Discharge Information Report, Wastewater Hauler Registration, and Dewatering Activity Discharge Approval are all submitted in identical ways in the System. However, the Test Results Upload is quite different so specific instructions have been provided below.

Figure 25 - Application Module - Create New Application

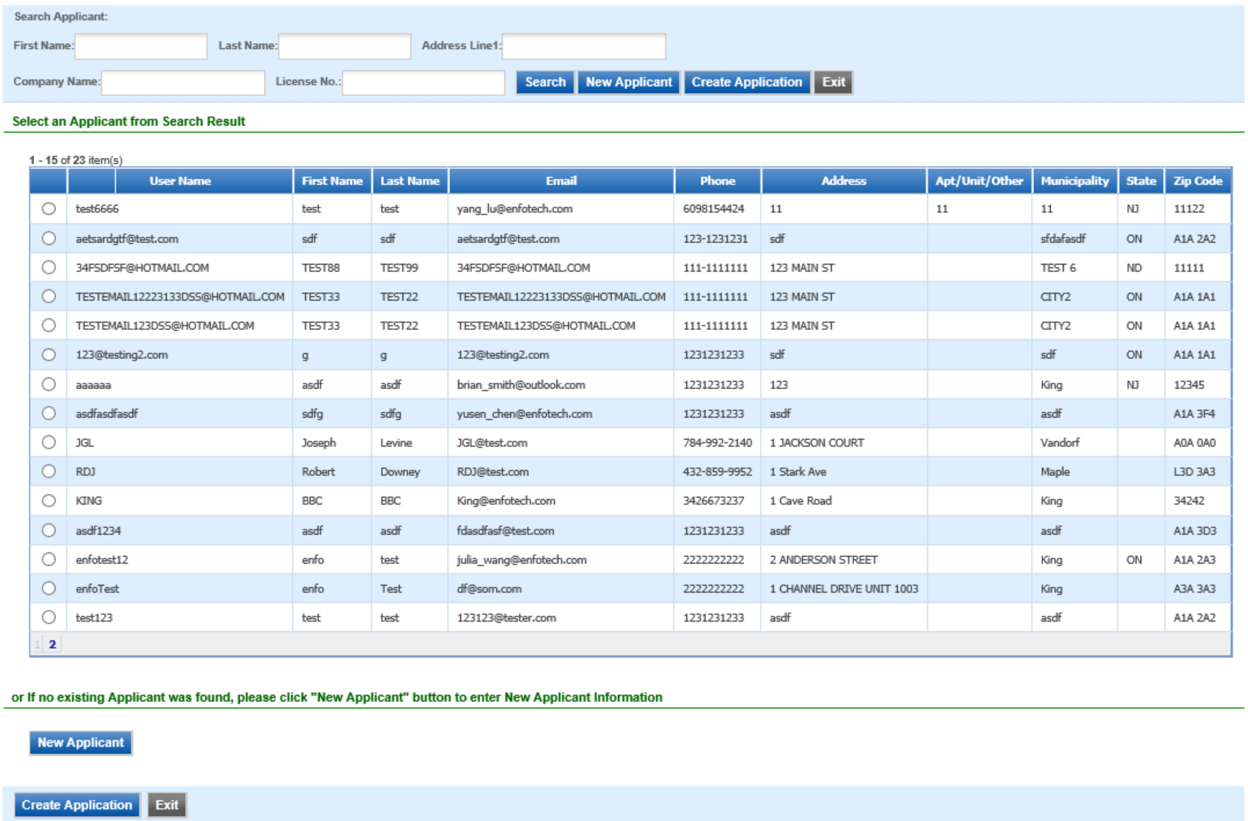


3.5.1 Submit an Application (Example DIR)

To begin a new Discharge Information Report (DIR) from the Home screen, just click the section pertaining to the Discharge Information Report or on the second screen (figure 26, click the purple (Apply) button below the Discharge Information Report section.

Once the new application is opened, the below form will be presented to the agency user:

Figure 26 - New Discharge Information Report Application – Select Applicant


Search Applicant:

First Name: Last Name: Address Line1:

Company Name: License No.: Search New Applicant Create Application Exit

Select an Applicant from Search Result

1 - 15 of 23 item(s)

	User Name	First Name	Last Name	Email	Phone	Address	Apt/Unit/Other	Municipality	State	Zip Code
○	test6666	test	test	yang_lu@enfotech.com	6098154424	11	11	11	NJ	11122
○	aetsardgtf@test.com	sdf	sdf	aetsardgtf@test.com	123-1231231	sdf		sfdafasdf	ON	A1A 2A2
○	34FSDFSF@HOTMAIL.COM	TEST88	TEST99	34FSDFSF@HOTMAIL.COM	111-1111111	123 MAIN ST		TEST 6	ND	11111
○	TESTEMAIL12223133DSS@HOTMAIL.COM	TEST33	TEST22	TESTEMAIL12223133DSS@HOTMAIL.COM	111-1111111	123 MAIN ST		CITY2	ON	A1A 1A1
○	TESTEMAIL123DSS@HOTMAIL.COM	TEST33	TEST22	TESTEMAIL123DSS@HOTMAIL.COM	111-1111111	123 MAIN ST		CITY2	ON	A1A 1A1
○	123@testing2.com	g	g	123@testing2.com	1231231233	sdf		sdf	ON	A1A 1A1
○	aaaaaa	asdf	asdf	brian_smith@outlook.com	1231231233	123		King	NJ	12345
○	asdfasdfasdf	sdfg	sdfg	yusen_chen@enfotech.com	1231231233	asdf		asdf		A1A 3F4
○	JGL	Joseph	Levine	JGL@test.com	784-992-2140	1 JACKSON COURT		Vandorf		A0A 0A0
○	RDJ	Robert	Downey	RDJ@test.com	432-859-9952	1 Stark Ave		Maple		L3D 3A3
○	KING	BBC	BBC	King@enfotech.com	3426673237	1 Cave Road		King		34242
○	asdf1234	asdf	asdf	fdasdfasf@test.com	1231231233	asdf		asdf		A1A 3D3
○	enfotest12	enfo	test	julia_wang@enfotech.com	2222222222	2 ANDERSON STREET		King	ON	A1A 2A3
○	enfoTest	enfo	Test	df@som.com	2222222222	1 CHANNEL DRIVE UNIT 1003		King		A3A 3A3
○	test123	test	test	123123@tester.com	1231231233	asdf		asdf		A1A 2A2

1 2

or If no existing Applicant was found, please click "New Applicant" button to enter New Applicant Information

New Applicant

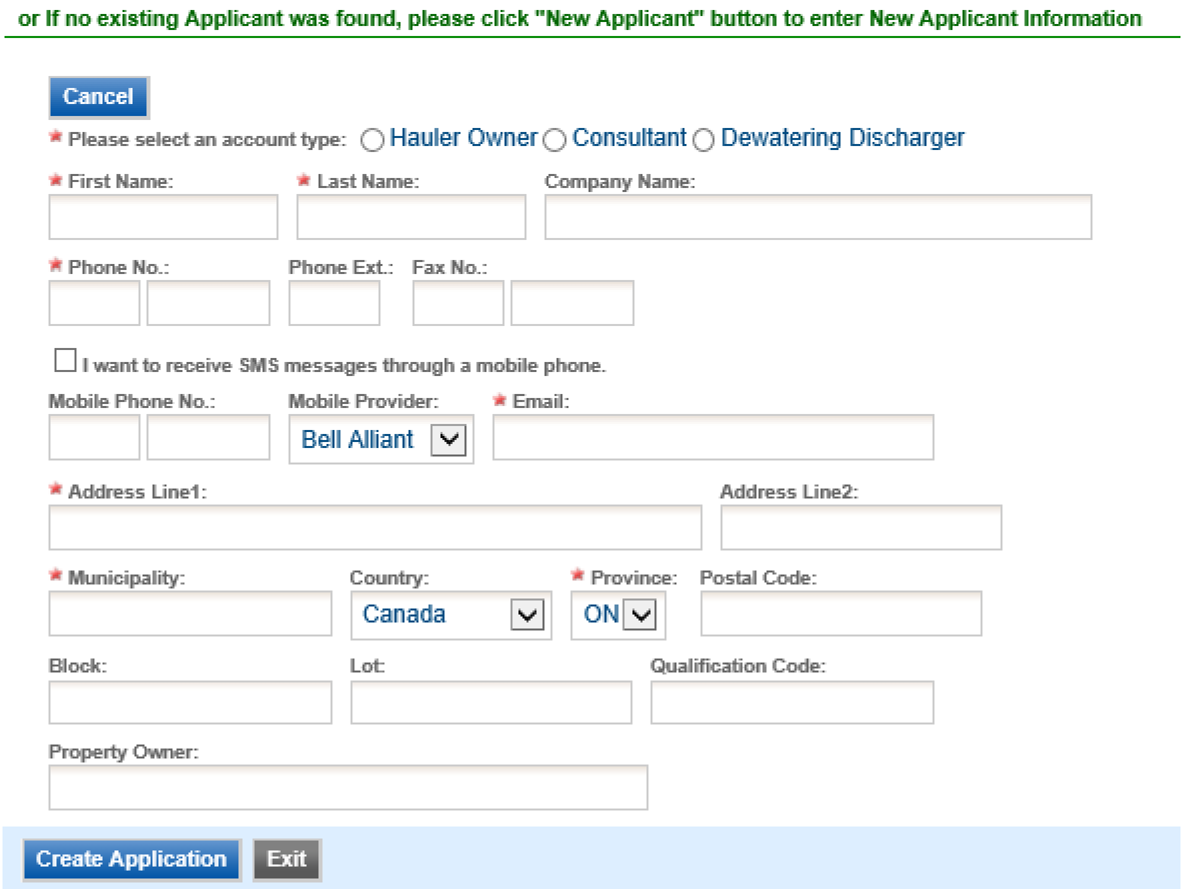
Create Application Exit

On this screen, the agency user has the option to either search for an existing public user using one of the available search fields at the top of the screen and clicking Search or creating a new public account by clicking one of the New Applicant buttons.

If the search fields and the Search button are used, a result grid will be displayed below the search fields showing public users matching the data inputted in the search fields. Select one of the available public users and click one of the Create Application buttons. This will take you to the screen containing the application form where the data will be entered.

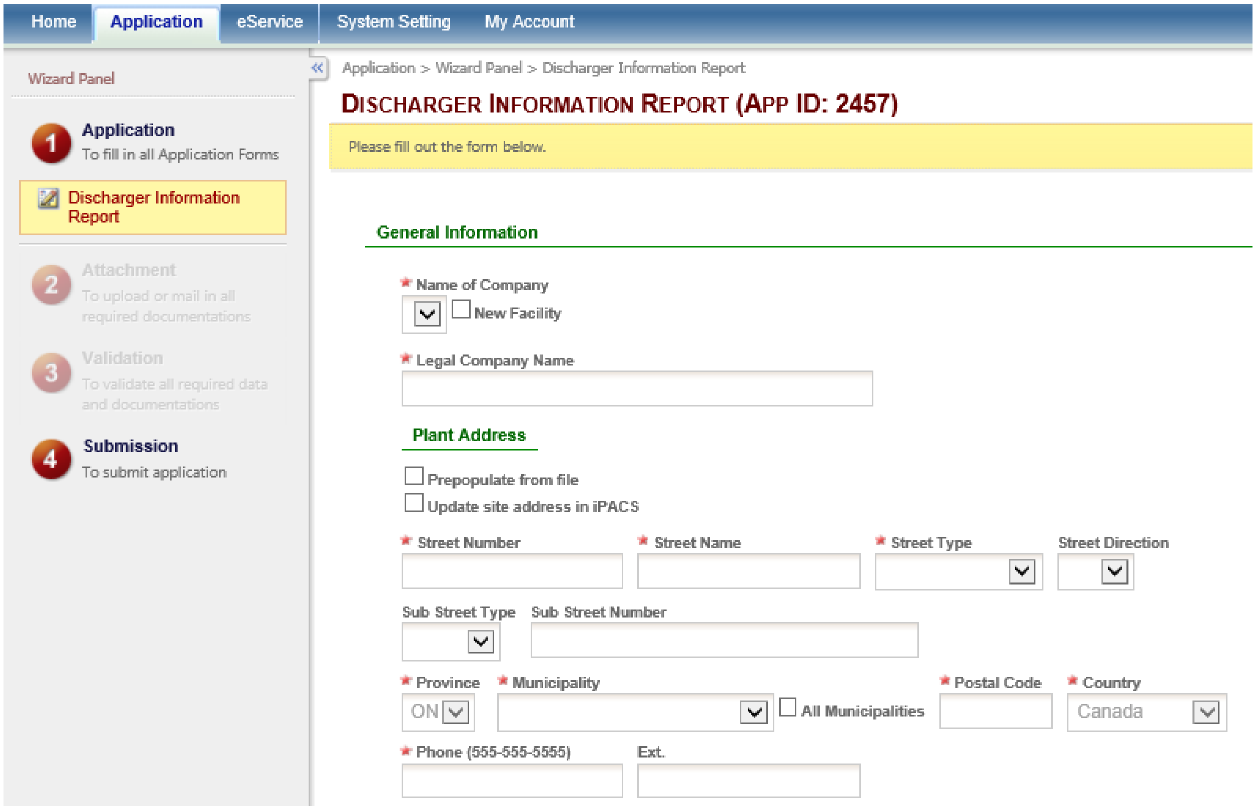
If the New Applicant button is clicked, the following screen will be displayed:

Figure 27 - New Discharge Information Report Application – Create Applicant



After filling in at least the required fields (marked with the *), click the Create Application button to create the new public user and open the screen containing the application form where data will be entered. The public user will immediately receive an email (and SMS message if applicable) letting them know that a new account has been created for them in the York Region Sewer Use Bylaw Services website.

Figure 28: New Discharge Information Report Application



The first question you will see on the page is a dropdown titles "Name of Company". If you are unable to find the correct Company in this dropdown for this application, you will either need to confirm that the public user is linked to an iPACS Facility (in the Public User Basic Information page in the System Settings module) or choose to create a new facility by checking the "New Facility" checkbox. Once this checkbox is checked, the top dropdown will disappear and be replaced by a "Name of Company" textbox and a new "iPACS Site Identifier" textbox. At this point, since you have already confirmed that the application relates to a new Facility, please leave the iPACS Site Identifier textbox empty. If you choose to enter an iPACS Facility ID in this field, when this application is approved, the application will be linked to the Facility ID entered rather than creating a new facility.

All fields marked with the red asterisk ( ) are required fields that need to have data entered in order for the form to be completed. An example of this is the "Name of Company" field.

On this form, there are three specific checkboxes "Update site address in iPACS", "Update mail address in iPACS", and "Update contact info in iPACS". These three checkboxes should be checked unless you are unsure the data you are entering is accurate as of the current date.

Certain fields have a format for the data to be entered to ensure correct and complete information is entered. For example, any of the Phone Number fields which will expect a ten digit sequence.

Continuing down the form, under the "Mail Address" section, there is a checkbox "Same as above" (see Figure 27). To aid in the speed and accuracy of data entry, if the Mailing Address of the Site is the same as the Plant Address/Physical Location entered above, check this box to copy that information into the Mailing Address fields.

Figure 29: New Discharge Information Report Application – Continued 1

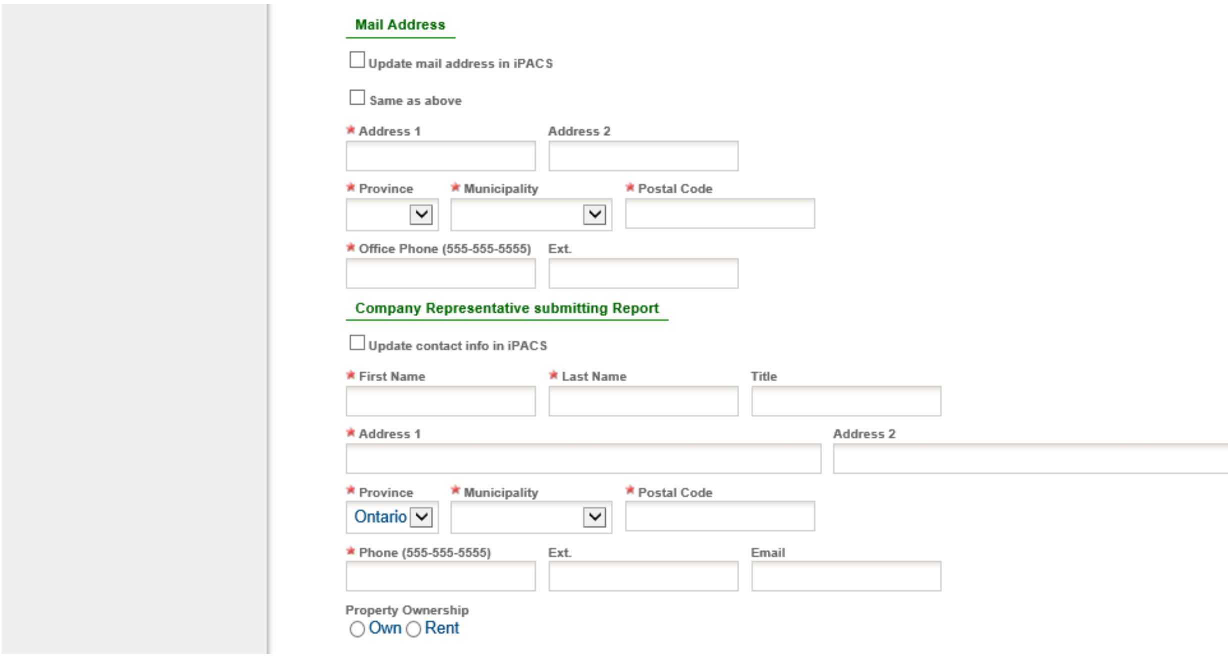
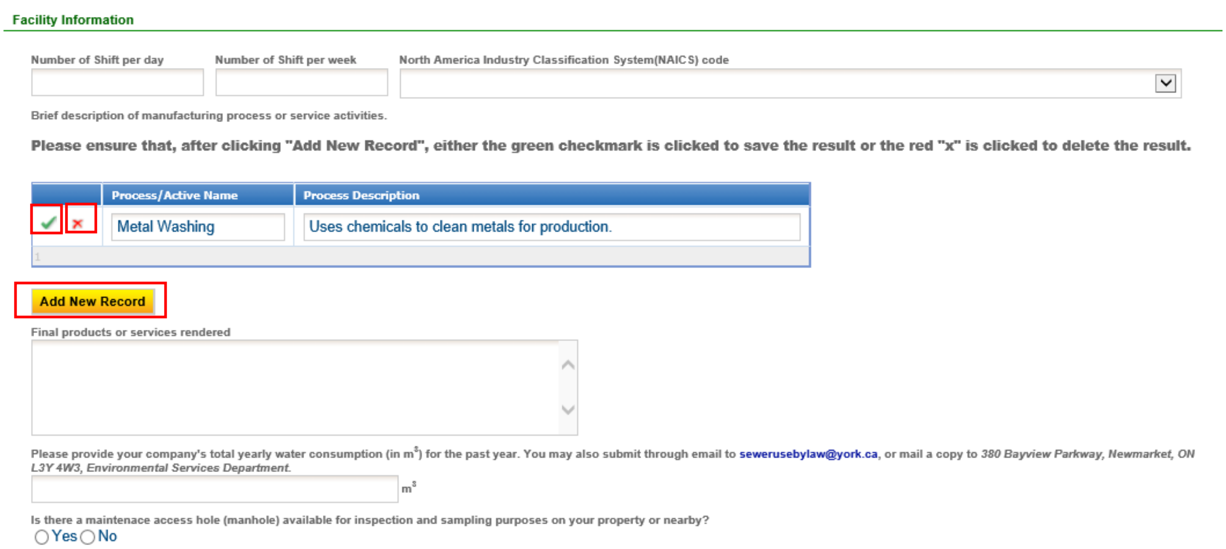


Figure 30: New Discharge Information Report Application – Continued 2

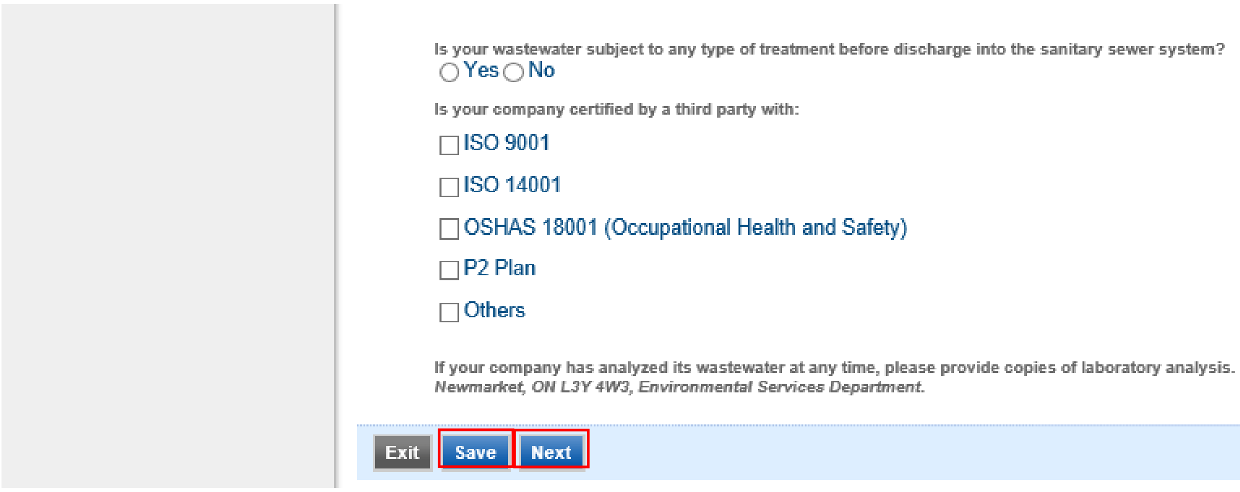


This DIR form contains a GridView format question which allow multiple entries related to the same question. In the above example (figure 29, the form is looking for a description of the Manufacturing Processes present at the facility. It is possible and likely that one facility implements several manufacturing processes.

To use the GridView control, you must first click the yellow (Add New Record) button which will add a new empty row to the grid above. After entering the required information in the grid, make sure to click the green (✔) to save the data entered. **If this checkmark is not clicked, the data will not be saved. The blue (Save) button at the bottom of the application WILL NOT SAVE THIS DATA.**

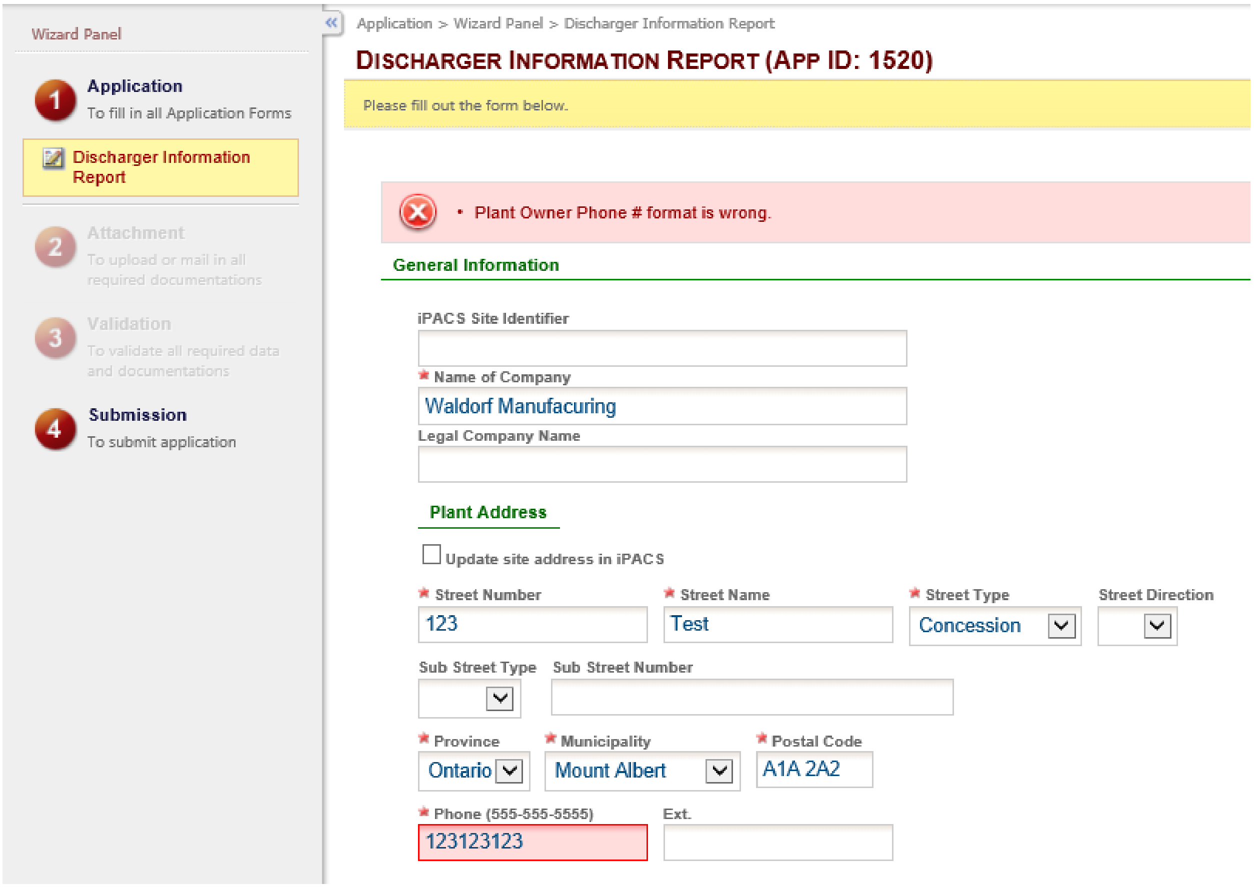
If after entering a row of data in the grid, you wish to remove that record, please click the red (✖) button and the row will be deleted.

Figure 31: New Discharge Information Report Application – Continued 3



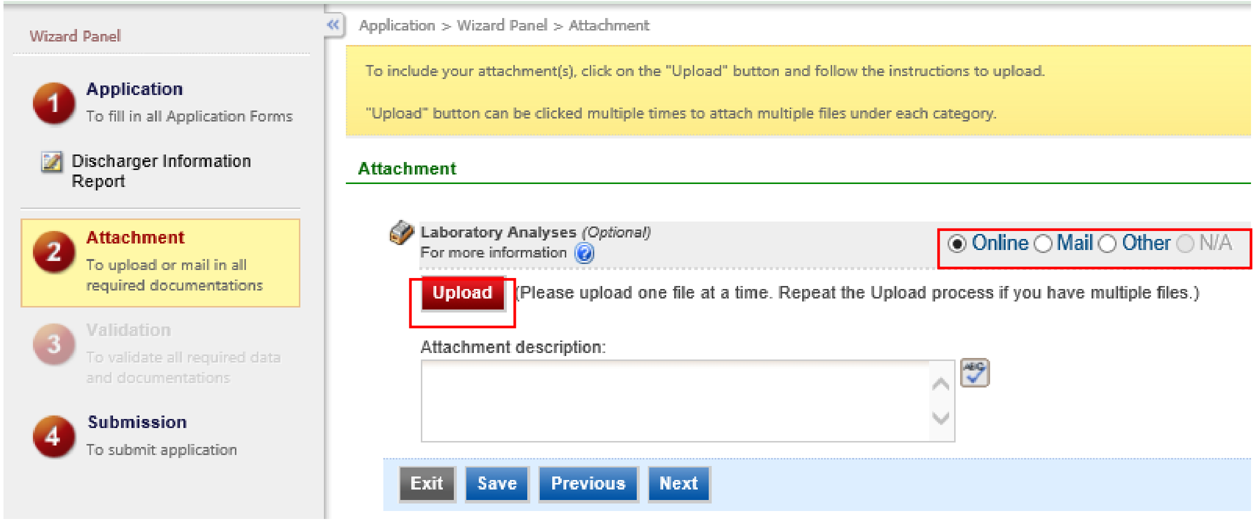
Once you have completed the data entry on the form above, at the bottom of the page, there are two buttons available. The blue (Save) button will save the information above, but not proceed you to the next step in the Application Submittal process. The blue (Next) button will also save the information, but, in addition, it will also validate the data, and if the data is cleared, the next step of the Application Submittal process will be presented. If the data validation fails for any reason, the page will reload presenting the error at the top of the page and highlighting the associated errors below in red. An example of this follows (figure 31):

Figure 32: New Discharge Information Report Application – Data Validation Issue



Once the data entry error(s) are corrected, click the blue (Next) button again, the Attachments section of the application submission will be presented. On this page, the agency user can upload accessory documents to the application that relate to the application and/or were submitted with the other information by the facility themselves.

Figure 33: New Discharge Information Report Application – Attachments

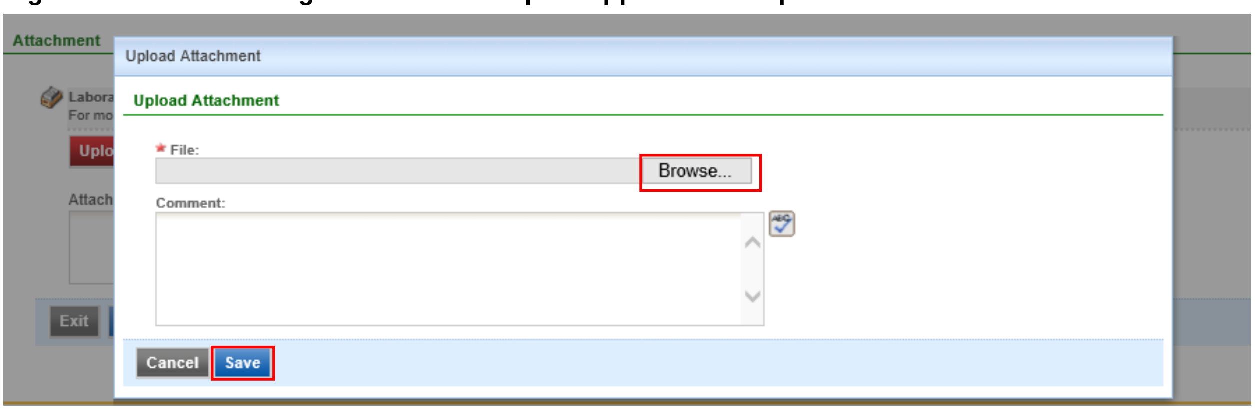


On the attachments screen, the most likely situation in the case of a paper submission by the facility is that the related documents will be scanned and uploaded with the application. If the “Online” option is chosen next to one of the attachment requirements, a red (Upload) button will be presented to the user.

When the red (Upload) button is clicked, a pop-up control will be presented which allows the agency user to select a local file on their computer to upload. Once the file is selected with the “Browse” button, click the blue (Save) button to return to the Attachment screen of the Application.

Note: The “Mail” and “Other” options do not have this option and are only presented with the “Attachment Description” comment box.

Figure 34: New Discharge Information Report Application – Upload Attachments



Once the uploading of documents is complete, at the bottom of the page, there are three buttons available. The blue (Save) button will save the information above, but not proceed you to the next step in the Application Submittal process. The blue (Previous) button will return the agency user back to the previous step in the application. The blue (Next) button will also save the information, but also proceed to the next step of the Application Submittal process.

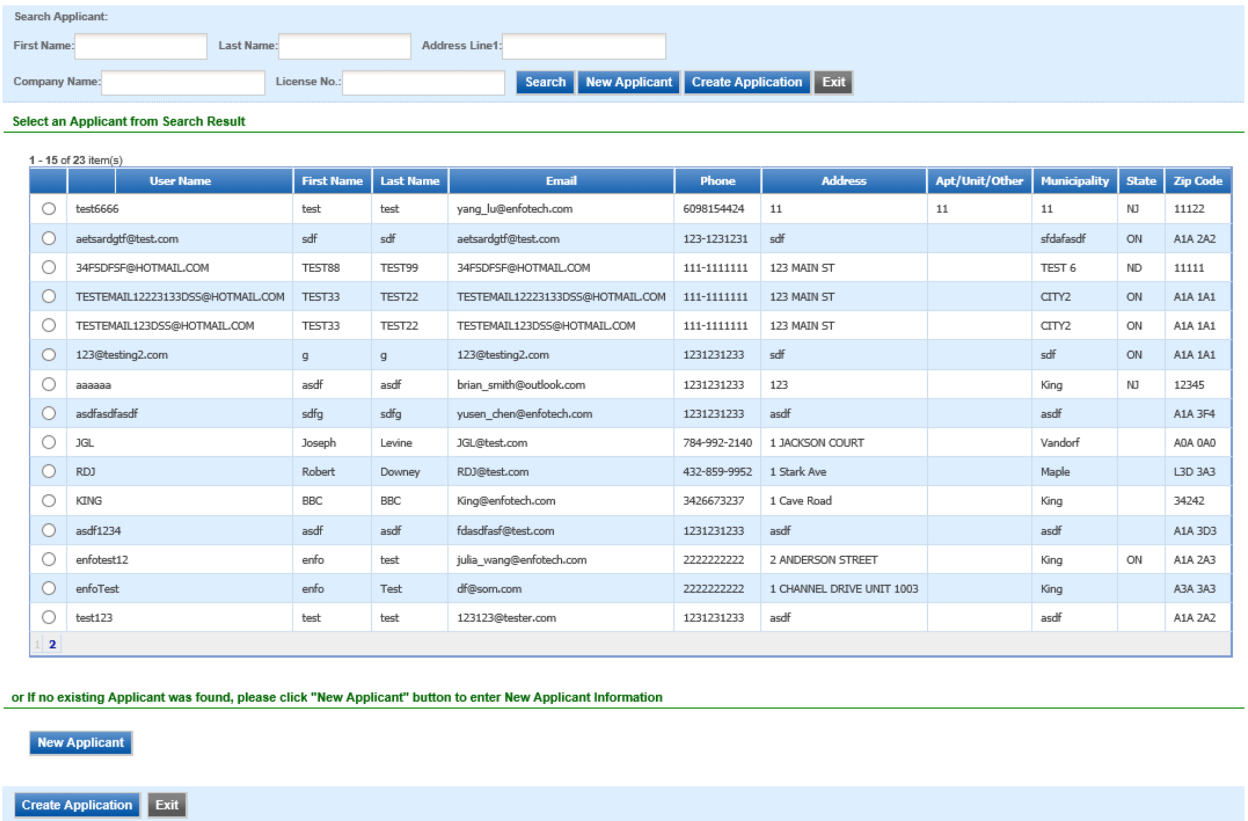
After the Attachment section of the DIR application, the final page is presented to the user before the application is fully submitted. This screen contains an agency disclaimer and two buttons. The blue (Previous) button will return the agency user back to the previous step in the application. The blue (Submit) button will submit the application and make it visible for review by other agency staff.

3.5.2 Test Results Data Upload

To begin the new Test Results Data Upload form from the Home screen, just click the section pertaining to the Test Results Data Upload application or use the Application module/Create New Application then click the purple (Apply) button below the Test Results Data Upload section.

Once the new application is opened, the below form will be presented to the agency user:

Figure 35 - New Discharge Information Report Application – Select Applicant



Search Applicant:

First Name: Last Name: Address Line1:

Company Name: License No.: Search New Applicant Create Application Exit

Select an Applicant from Search Result

1 - 15 of 23 item(s)

	User Name	First Name	Last Name	Email	Phone	Address	Apt/Unit/Other	Municipality	State	Zip Code
	test6666	test	test	yang_lu@enfotech.com	6098154424	11	11	11	NJ	11122
	aetsardgtf@test.com	sdf	sdf	aetsardgtf@test.com	123-1231231	sdf		sfdafasdf	ON	A1A 2A2
	34FSDFSF@HOTMAIL.COM	TEST88	TEST99	34FSDFSF@HOTMAIL.COM	111-1111111	123 MAIN ST		TEST 6	ND	11111
	TESTEMAIL12223133DSS@HOTMAIL.COM	TEST33	TEST22	TESTEMAIL12223133DSS@HOTMAIL.COM	111-1111111	123 MAIN ST		CITY2	ON	A1A 1A1
	TESTEMAIL123DSS@HOTMAIL.COM	TEST33	TEST22	TESTEMAIL123DSS@HOTMAIL.COM	111-1111111	123 MAIN ST		CITY2	ON	A1A 1A1
	123@testing2.com	g	g	123@testing2.com	1231231233	sdf		sdf	ON	A1A 1A1
	aaaaaa	asdf	asdf	brian_smith@outlook.com	1231231233	123		King	NJ	12345
	asdfasdfasdf	sdfg	sdfg	yusen_chen@enfotech.com	1231231233	asdf		asdf		A1A 3F4
	JGL	Joseph	Levine	JGL@test.com	784-992-2140	1 JACKSON COURT		Vandorf		A0A 0A0
	RDJ	Robert	Downey	RDJ@test.com	432-859-9952	1 Stark Ave		Maple		L3D 3A3
	KING	BBC	BBC	King@enfotech.com	3426673237	1 Cave Road		King		34242
	asdf1234	asdf	asdf	fdasdfasf@test.com	1231231233	asdf		asdf		A1A 3D3
	enfotest12	enfo	test	julia_wang@enfotech.com	2222222222	2 ANDERSON STREET		King	ON	A1A 2A3
	enfoTest	enfo	Test	df@som.com	2222222222	1 CHANNEL DRIVE UNIT 1003		King		A3A 3A3
	test123	test	test	123123@tester.com	1231231233	asdf		asdf		A1A 2A2

1 2

or If no existing Applicant was found, please click "New Applicant" button to enter New Applicant Information

New Applicant

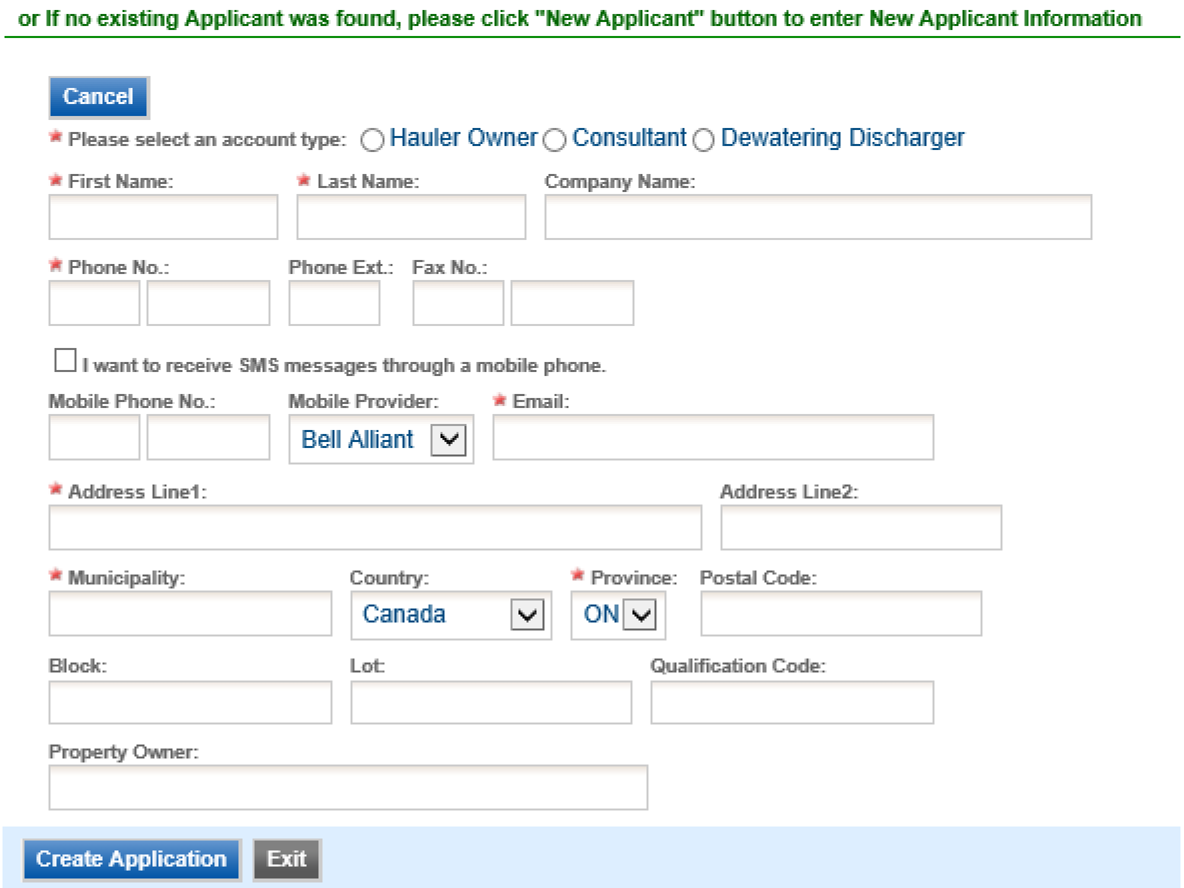
Create Application Exit

On this screen, the agency user has the option to either search for an existing public user using one of the available search fields at the top of the screen and clicking Search or creating a new public account by clicking one of the New Applicant buttons.

If the search fields and the Search button are used, a result grid will be displayed below the search fields showing public users matching the data inputted in the search fields. Select one of the available public users and click one of the Create Application buttons. This will take you to the screen containing the application form where the data will be entered.

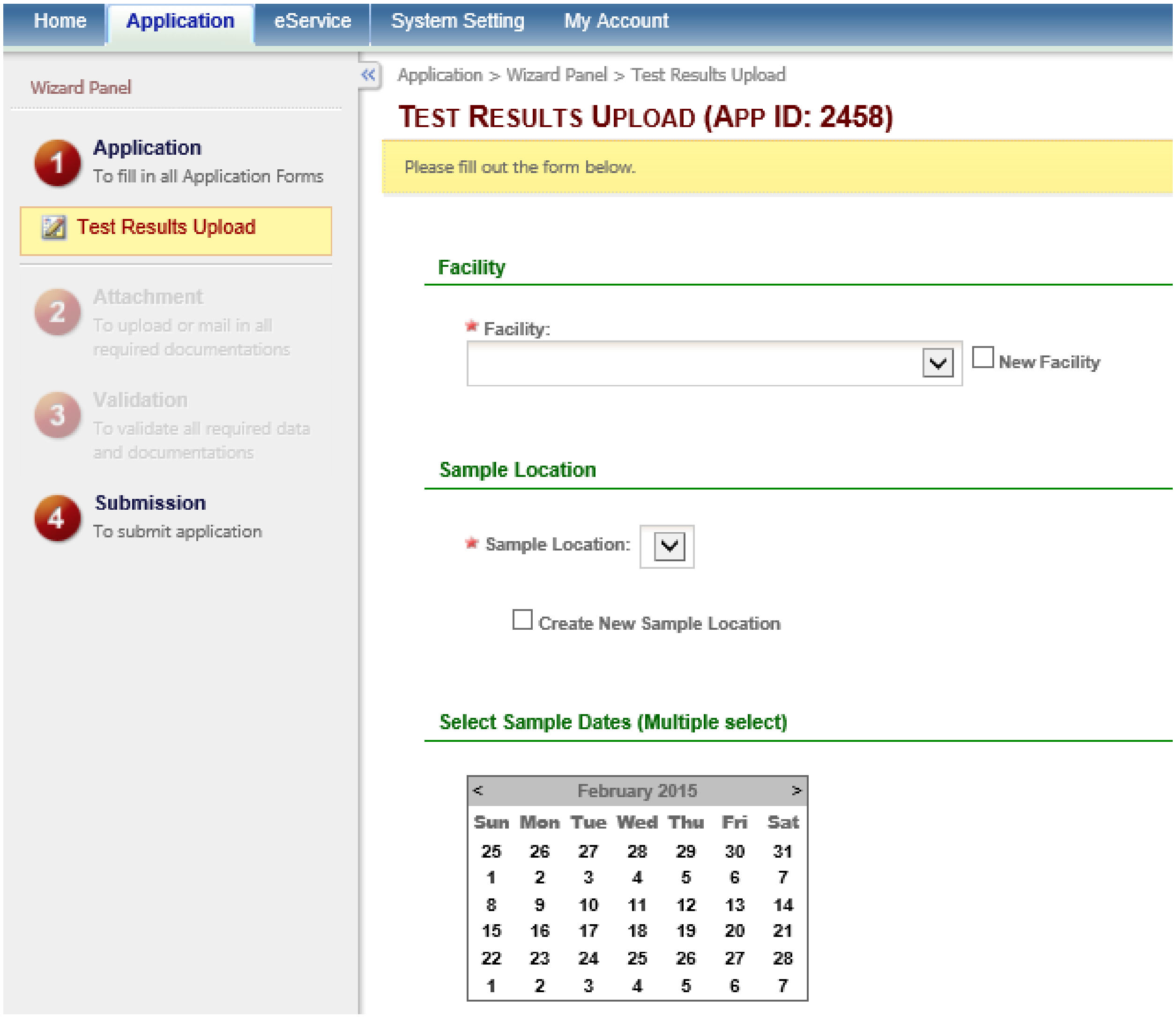
If the New Applicant button is clicked, the following screen will be displayed:

Figure 36 - New Discharge Information Report Application – Create Applicant



After filling in at least the required fields (marked with the *), click the Create Application button to create the new public user and open the screen containing the application form where data will be entered. The public user will imeedaitly receive an email (and SMS message if applicable) letting them know that a new account has been created for them in the York Region Sewer Use Bylaw Services website.

Figure 37: New Test Results Data Upload Application

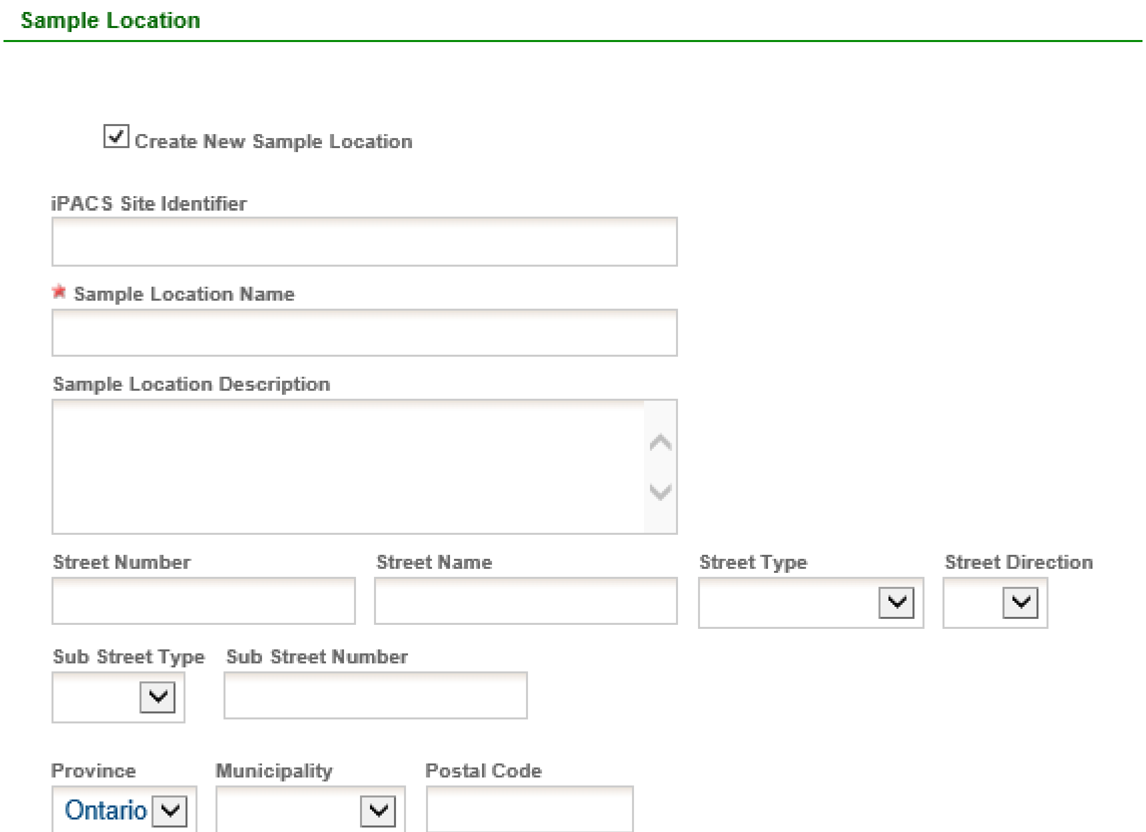


For entering sample results, it is critical to identify the location with which the original sample was taken. To facilitate this, two dropdowns should be used (figure 34). The first dropdown on the page “Facility” should be chosen first. This dropdown contains the name of the facility as well as the physical location which can assist in the cases of a facility having franchise locations around the local area. If the correct facility is found and selected, the page will refresh. If sample locations associated to the now selected facility in iPACS, the Sample Location dropdown will show you a list of those sample locations. If no sample locations are found in iPACS, this dropdown will remain empty.

If in the “Sample Location” dropdown, an option exists which matches the test results upload form received, please proceed with choosing that location and continue to fill in the form.

If either the correct facility was not present in the “Facility” dropdown, or the facility was present but the correct sample location was not present in the “Sample Location” dropdown, please click the checkbox labeled “Create New Sample Location” (figure 35). This will allow the agency user to either create a new facility with sample location, or just a new sample location associated to an existing facility. If this checkbox is checked, the screen will refresh and show additional field to gather the required information for the new sample location, as below:

Figure 38: New Test Results Data Upload Application - New Sample Location



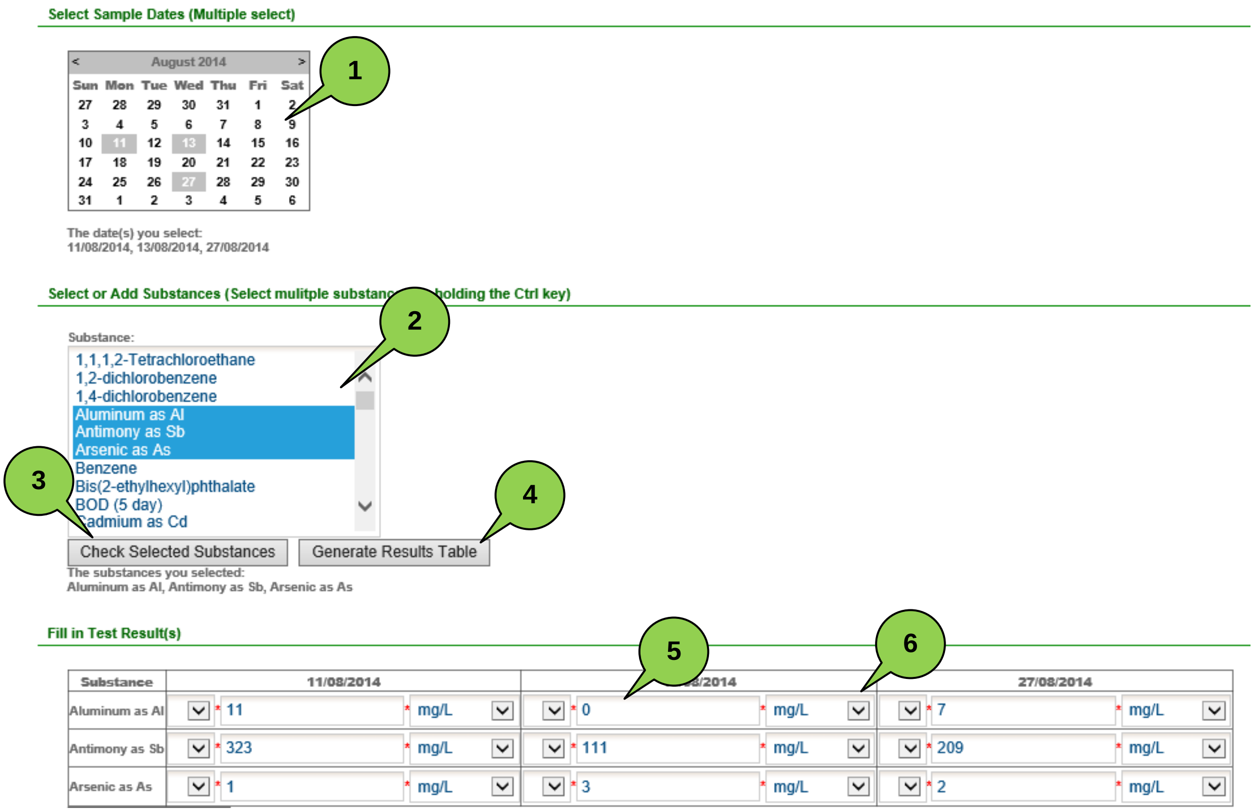
The first question on the form is iPACS Site Identifier, as it relates specifically to an ID in the iPACS system, it should be left blank if this test result was from a new facility or fill in with an existing facility ID if this is just a new sampling location

All fields marked with the red asterisk (*) are required fields that need to have data entered in order for the form to be completed. An example of this is the “Sample Location Name” question. **For this form, the “Street Number”, “Street Name”, “Street Type”, “Province”, “Municipality”, and “Postal Code” are also required.**

Certain fields have a format for the data to be entered to ensure correct and complete information is entered. An example of this is any of the Postal Code fields which will expect an alphanumeric sequence like ‘A1A 1A1”.

Once either the new sample location information is entered or an existing sample location is selected, the agency user will then need to select the days to which the sample results relate. It is possible for many sample days to be included in one sample results form, so the control which contains a month view, allows you to select many days at once.

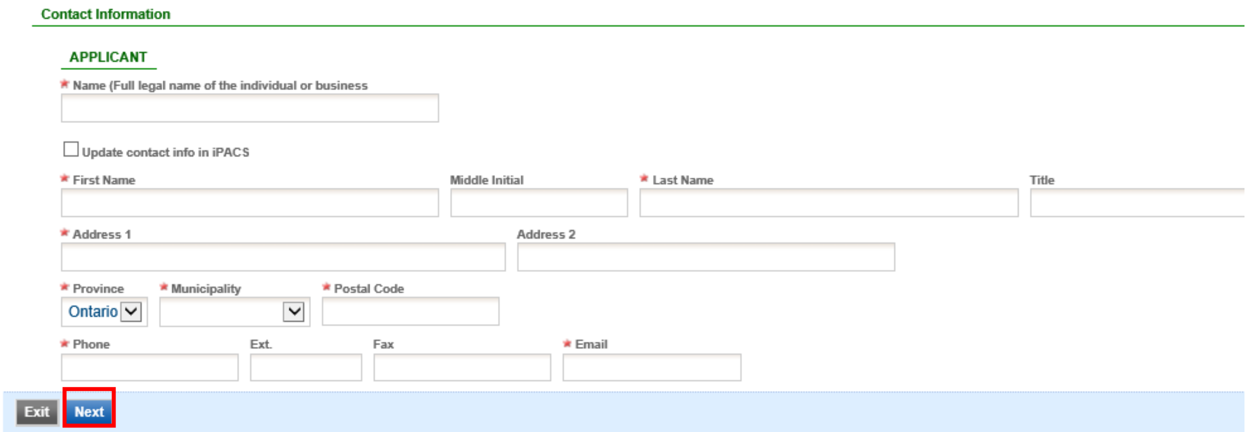
Figure 39: New Test Results Data Upload Application – Sample Result Entry



Here are brief descriptions of actions that must be carried out by agency user (as marked numbers shown in the above Test Results Data Upload screen section)in order to correctly submit a Test Results Upload application:

1. Calendar control allows the selection of multiple days in one or many months. Use the “<” and “>” buttons at the top to travel between months. Once a day is clicked, it will be highlighted in grey. The days selected are also presented below the calendar.
2. In the substance list, the substances which results were received for must be selected in this list. To select multiple substance, **hold the <Ctrl> key** on your keyboard as you click the different substances. The substances should be highlighted in blue once selected.
3. Once the substances have been selected, click the “Check Selected Substances” to confirm the selection. Once this is clicked, the substances will be displayed below the substance selection list.
4. After the “Check Selected Substances” button has been clicked and substances are displaying below the substance list, click the “Generate Results Table” button to create a grid with the substances down the left hand column and the sample days across the top.
5. In the grid, there are two required fields for each substance for each sample date. The first is the result field which is the longest visible field in the grid.
6. The second required field for each substance of each sample date is the Unit dropdown

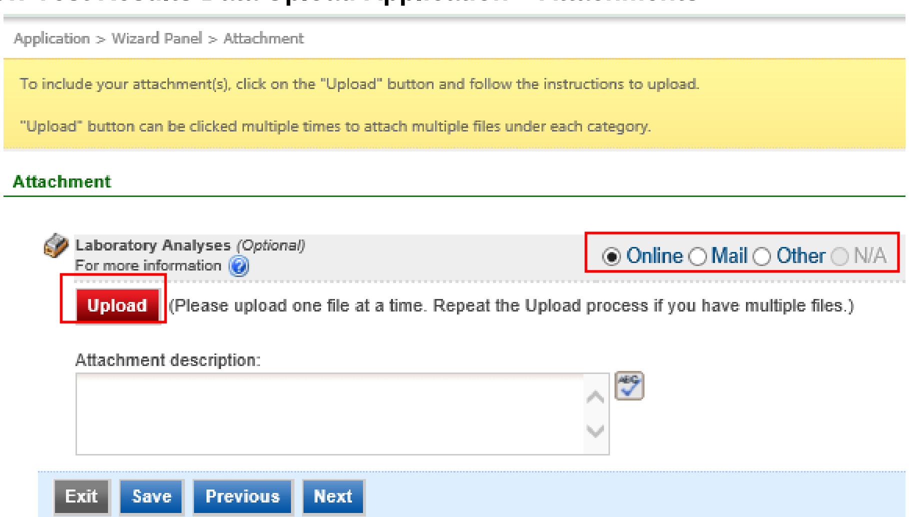
Figure 40: New Test Results Data Upload Application – Continued



Once you have completed the data entry on contact information section above, at the bottom of the page, there is blue (Next) button which will save the information and it will also validate the data. If the data is cleared, the next step of the Application Submittal process will be presented. If the data validation fails for any of the fields, the page will reload presenting the error at the top of the page and highlighting the associated errors below in red.

Once the issues with the data are corrected and the blue (Next) button is clicked again, the Attachments section of the application submission is presented. On this page, the agency user can upload accessory documents to the application that relate to the application and/or were submitted with the other information by the facility themselves.

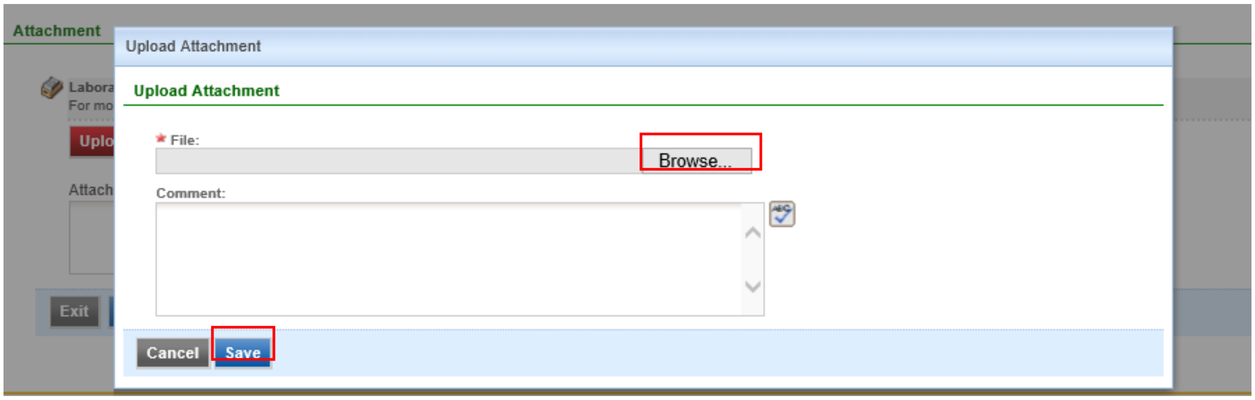
Figure 41 - New Test Results Data Upload Application – Attachments



On the attachments screen, the most likely situation in the case of a paper submission by the facility is that the related documents will be scanned and uploaded with the application. If the "Online" option is chosen next to one of the attachment requirements, a red (Upload) button will be presented to the user. The "Mail" and "Other" options do not have this option and are only presented with the "Attachment Description" comment box.

When the red (Upload) button is clicked, a pop-up control will be presented which allows the agency user to select a local file on their computer to upload. Once the file is selected with the “Browse” button, click the blue (Save) button to return to the Attachment screen of the Application.

Figure 42 - New Test Results Data Upload Application – Upload Attachments



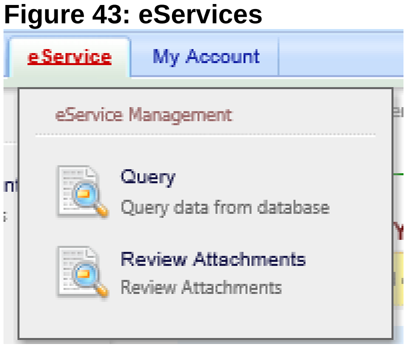
Once the uploading of documents is complete, at the bottom of the page, there are three buttons available. The blue (Save) button will save the information above, but not proceed you to the next step in the Application Submittal process. The blue (Previous) button will return the agency user back to the previous step in the application. The blue (Next) button will also save the information, but also proceed to the next step of the Application Submittal process.

After the Attachment section of the Test Results Data Upload application, the final page is presented to the user before the application is fully submitted. This screen contains an agency disclaimer and two buttons. The blue (Previous) button will return the agency user back to the previous step in the application. The blue (Submit) button will submit the application and make it visible for review by other agency staff.

4 eServices (Facility Information and Attachments)

Sewer Use Bylaw Services’s eServices allows users to review relevant iPACS information about the industry’s compliance, surcharge bill, and other information by using of the Query and Attachments modules.

Figure 43: eServices

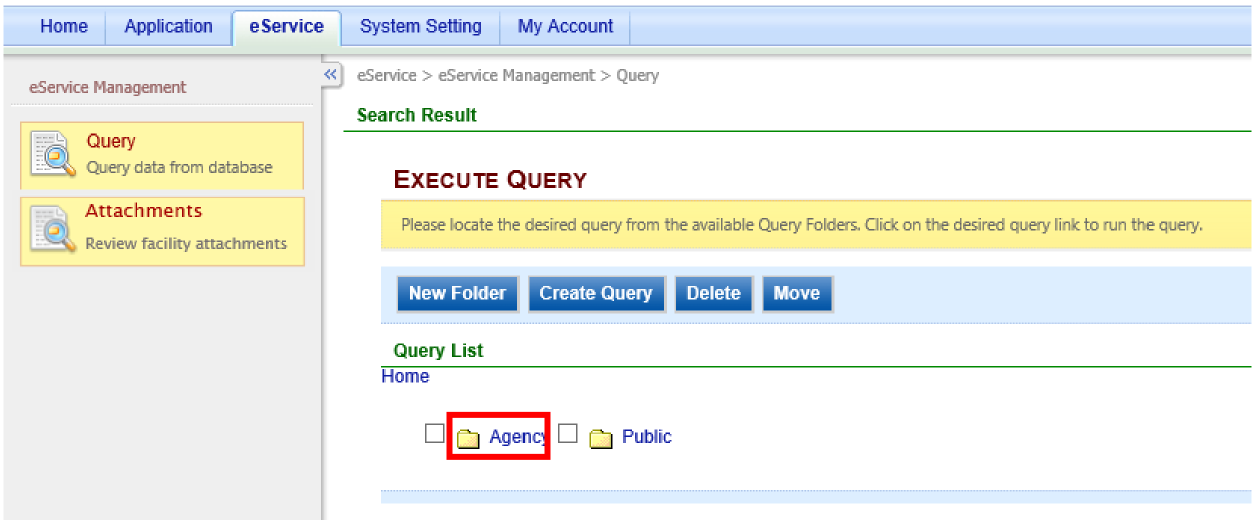


4.1 *Query Tool*

Once entering the Query module, the agency user will be presented with the folder selection page. By default, the agency users will have access to a folder called "Agency".

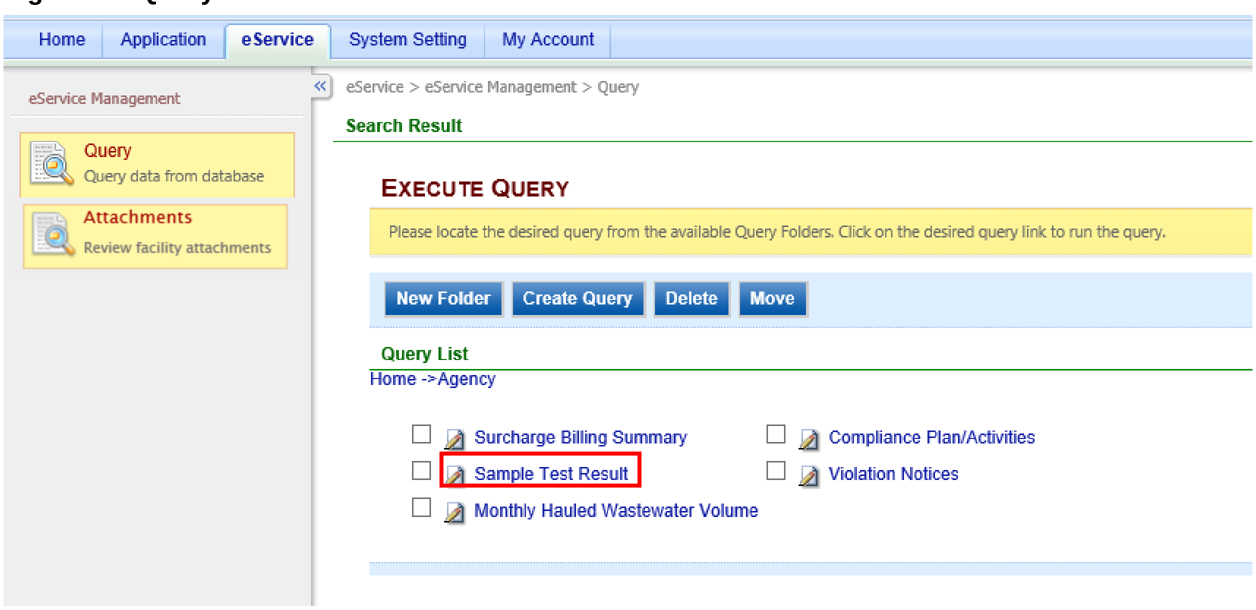
1. Click the "**Agency**" folder

Figure 44: Query Folders



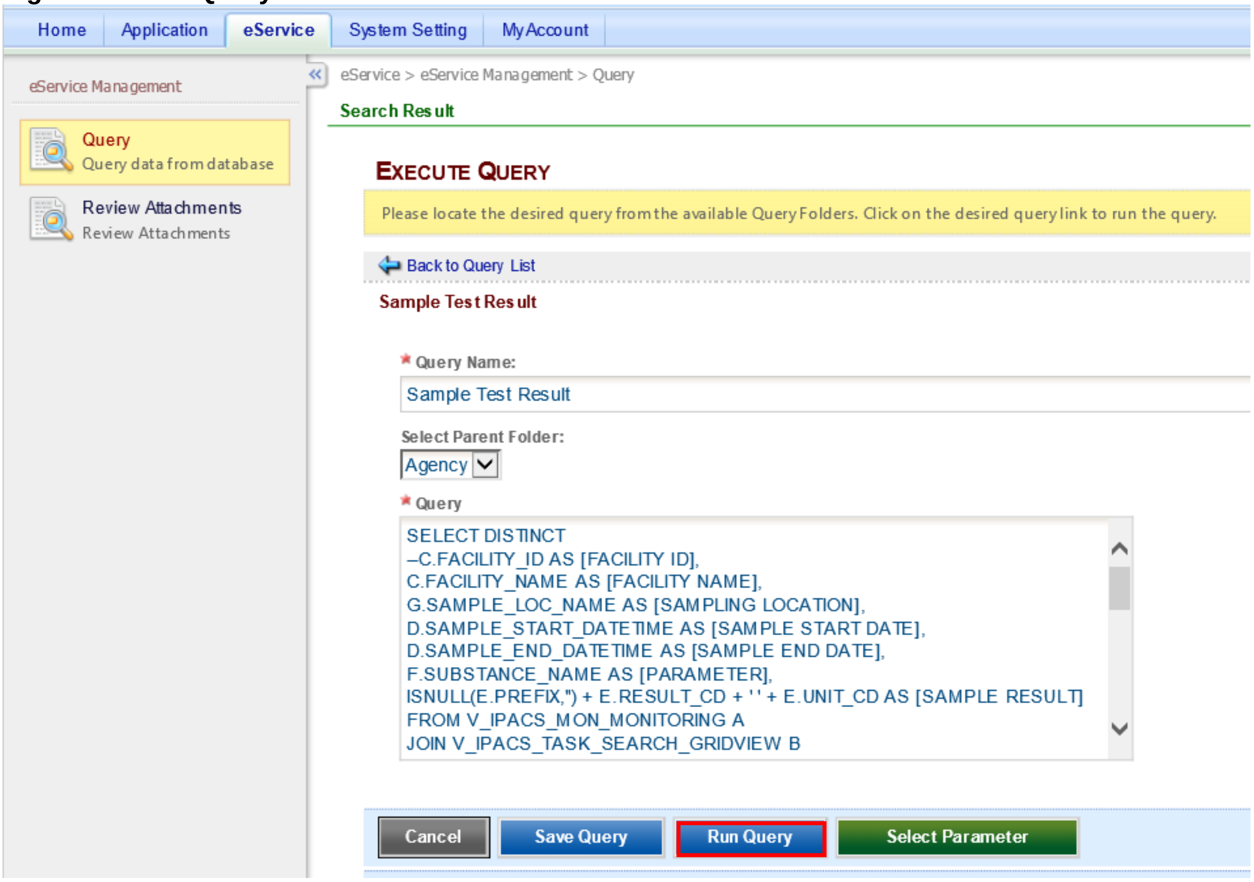
2. Click the name of one of the queries available (Sample Test Result for Example)

Figure 45: Query List



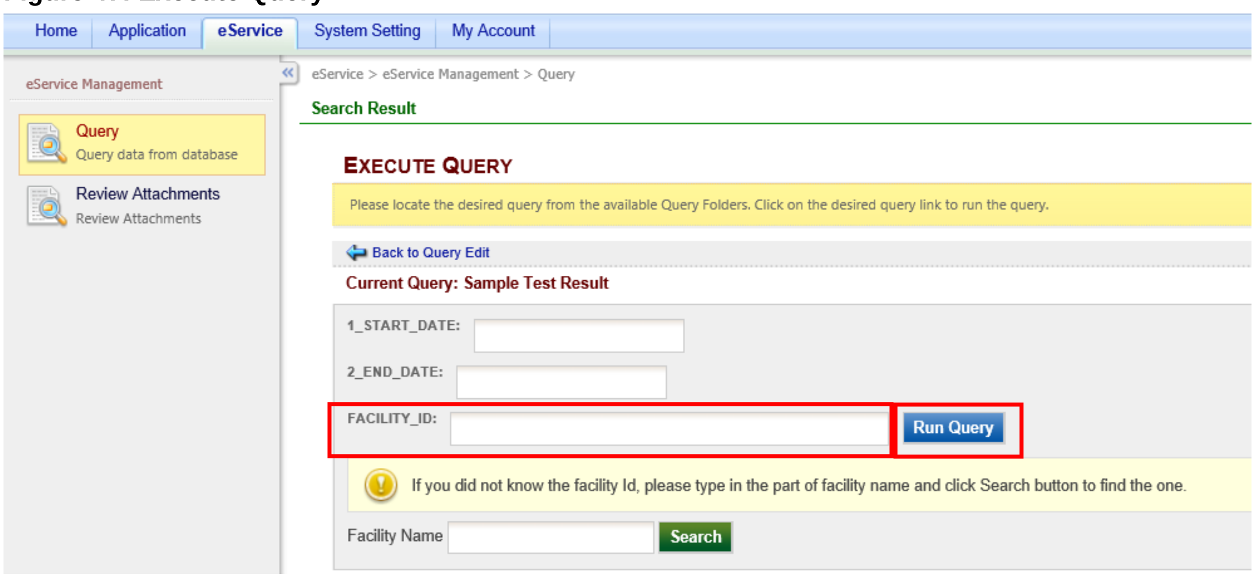
3. Click "**Run Query**"

Figure 46: Run Query



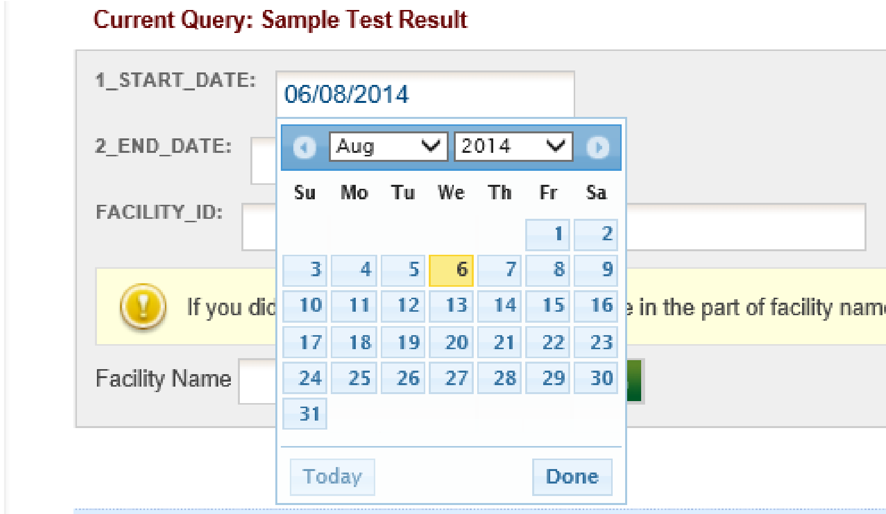
4. Enter or search for results based on a Start Date, End Date, and/or a **Facility ID**.

Figure 47: Execute Query



To select a start or end date, click the text field next to either of the parameters and a calendar should then be visible. In the calendar, select a date.

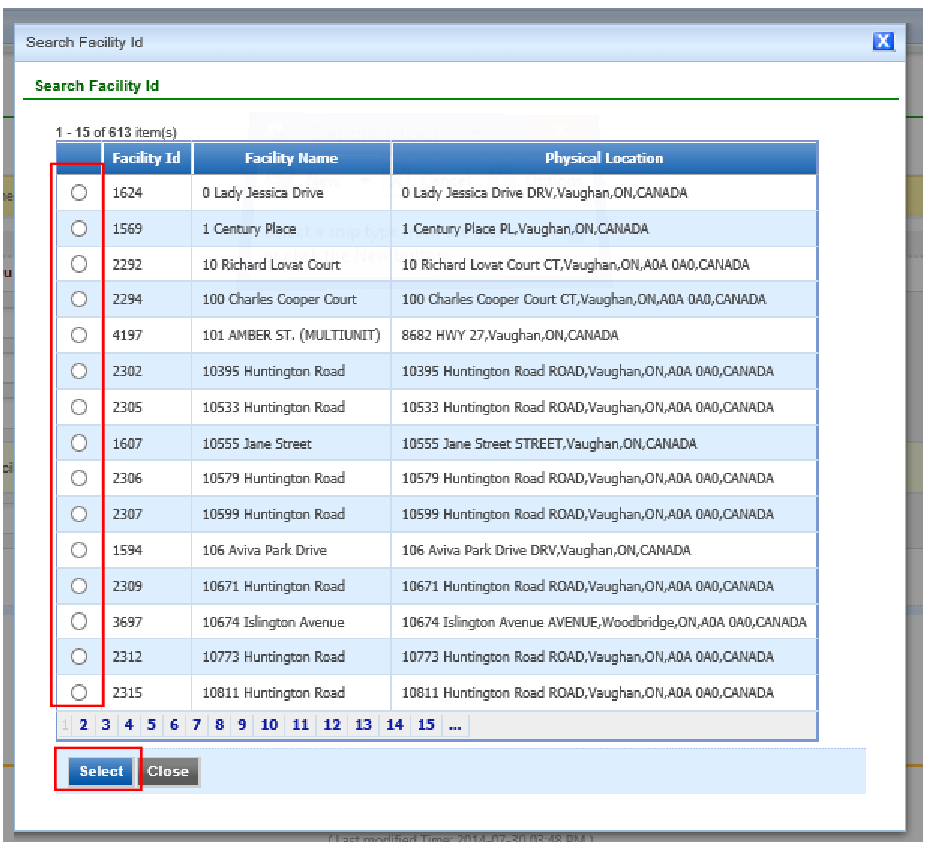
Figure 48: Execute Query Continued



If you do not know the Facility ID, use the Facility Name field and the (Search) button to find the correct facility.

a. After clicking (Search), choose the correct facility with the radio button and click (Select)

Figure 49- Run Query - Select Facility



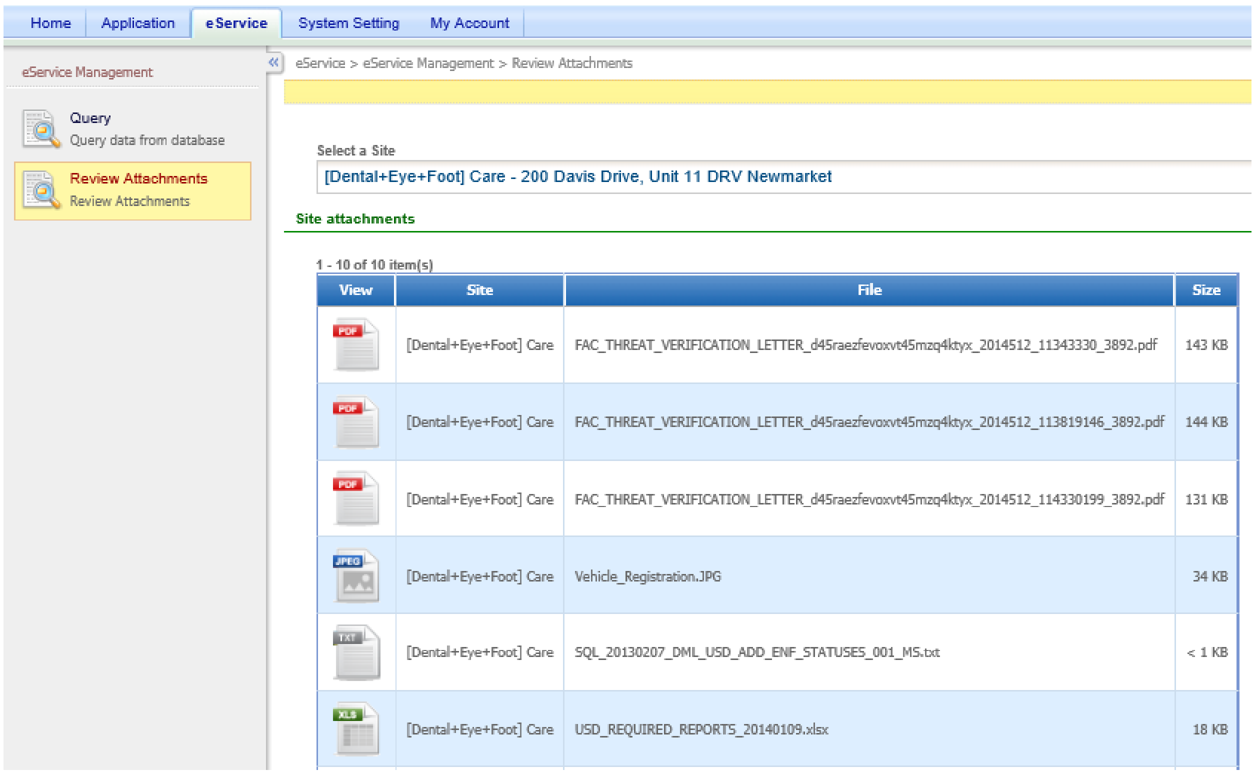
5. The facility ID will be placed in the FACILITY_ID box (figure 44), click (Run Query)

6. At the bottom of the screen, the query results will be presented to the user and can be exported to excel for further review.

4.2 *Review Attachments*

Once entering the Review Attachments module, the agency user will be presented with the attachment search page. At the top of this page, there is a facility drop down field, in which you may either type in the name of the facility or scroll and pick the facility Once the agency user finds the correct facility, the page will refresh and display to the user all of the attachments linked to that facility that exist in the iPACS Database system. These attachments are then broken down further into sections that relate to different aspects of the facility (Monitoring, Compliance, Inspection etc.)

Figure 50: Review Attachments per Facility



To view the attachments, click the icon under the view column and a dialogue box will appear asking if you would like to open or save the file locally.

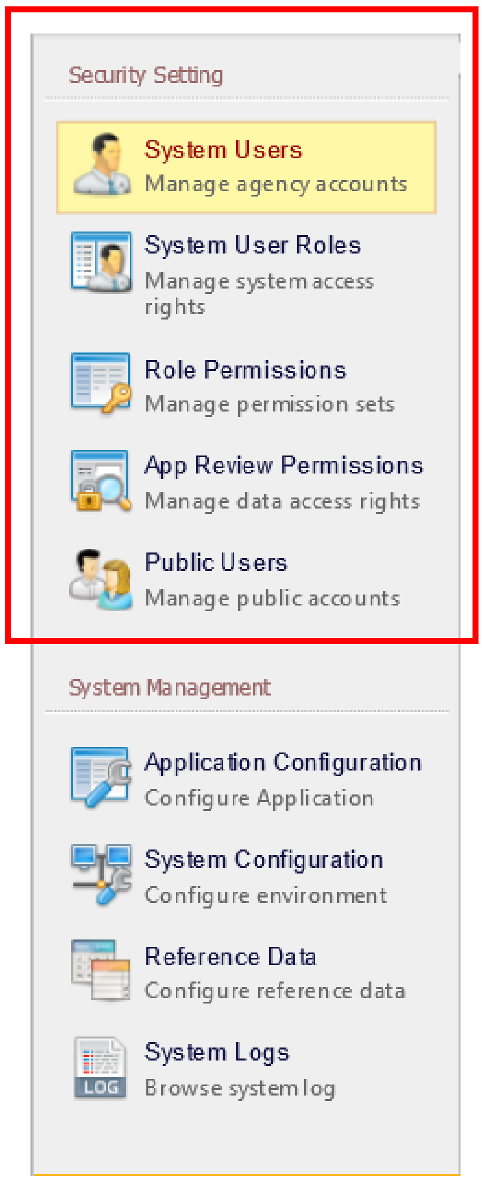
5 System Setting

Security setting can be set from System Setting. This section provides various system level's and application level's configuration. It also provides the capability to manage reference data which includes application fees' configuration. This also provides workflow configuration and system log's management.

5.1 *Security Setting*

This section is used to manage application security setting which includes manage system/public users and manage groups/roles and permissions.

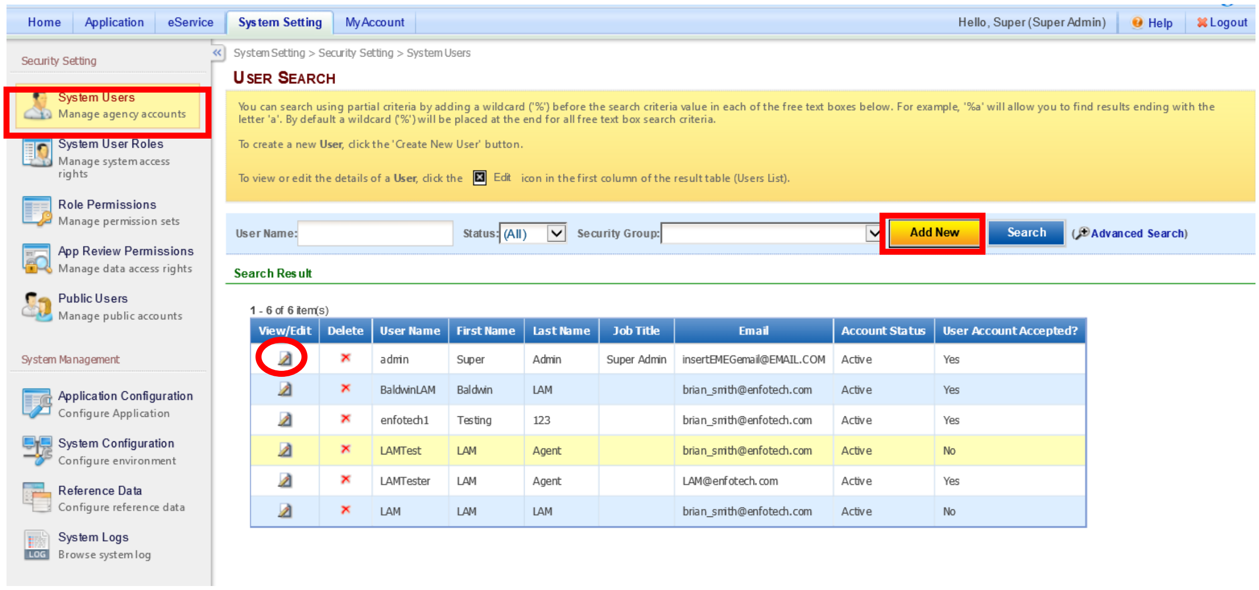
Figure 51: System Settings



5.1.1 System Users

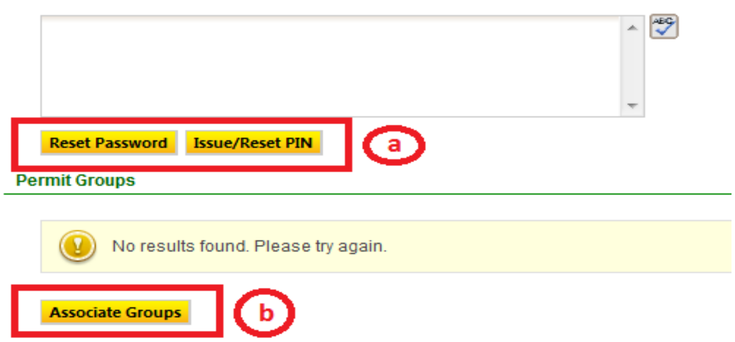
This is used to add new agency user or modify existing agency user's information which includes reset PIN/Password and also manage user's security group.

Figure 52: Manage System Users



1. To add a new agency user, click "**Add New**" button and fill out all required information. Once "**Save User Info**" button is clicked, a randomly generated password will be sent to the user's email address.
2. To modify an existing agency user, click on View/Edit (" ") icon to select the desired user to update. Once the modification is finished, click "**Save User Info**" to save all changes.
   a. Password and PIN can be reset here.
   b. Selected groups can be associated here.

Figure 53: Modify System Users



3. Security Roles can be associated and disassociated from the user to control their security privileges in the system. If multiple Roles are associated to a user, the user will get the summation of all security. For most agency users, they should be associated to the "APPLICATION' roles as well as the "QueryToolRole". The "System – Admin" role should be reserved for only the users that can change things such as reference data and other users' security.

Figure 54: Modify Relationship between System User and Roles

System Roles

1 - 10 of 10 item(s)

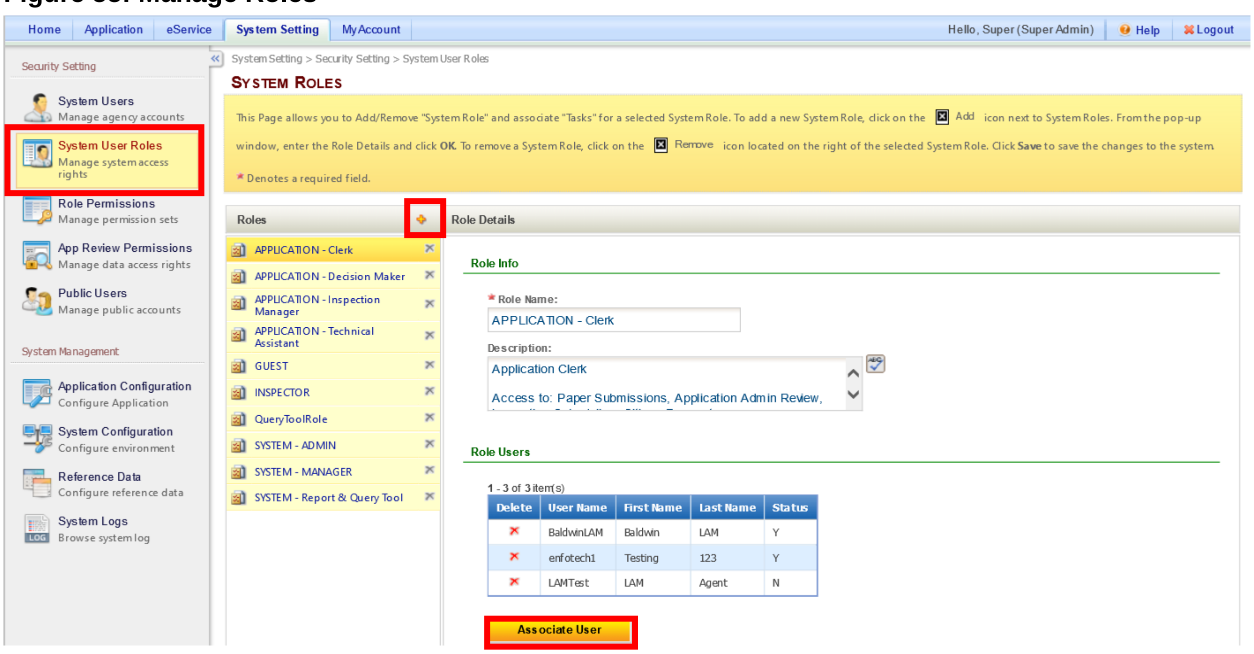
Groups	Role Name	Description	Groups
☐	GUEST	Guest Access to: Nothing (i.e. View only Access)	☐ Super Administrator ☐ Groups
☐	APPLICATION - Clerk	Application Clerk Access to: Paper Submissions, Application Admin Review, Inspection Scheduling, Citizen Request	☐ Super Administrator ☐ Groups
☐	APPLICATION - Technical Assistant	Application Technical Assistant Access to: Application Technical Review, Inspection Scheduling, Citizen Request	☐ Super Administrator ☐ Groups
☐	APPLICATION - Decision Maker	Application Official Access to: Application Decision (i.e. Issue/Deny), Inspection Scheduling, Inspection Decision (i.e. Pass/Fail), Citizen Request	☐ Super Administrator ☐ Groups
☐	APPLICATION - Inspection Manager	Inspection Manager Access to: Inspection Scheduling, Inspection Decision (i.e. Pass/Fail)	☐ Super Administrator ☐ Groups
☑	SYSTEM - ADMIN	TOP LEVEL permission. Access to: Everything!	☐ Super Administrator ☐ Groups
☐	SYSTEM - MANAGER	The system setting manager who can add, modify users. Access to: all System Settings	☐ Super Administrator ☐ Groups
☐	SYSTEM - Report & Query Tool	Other Access to: Report and Query Tool features	☐ Super Administrator ☐ Groups
☐	INSPECTOR	INSPECTOR	☐ Super Administrator ☐ Groups
☐	QueryToolRole		☐ Super Administrator ☐ Groups

5.1.2 System User Roles

This is used to add new user role or modify existing user role which includes modify the associated users with the user role and also the user role property setting of Permit Type, Inspection Type, Report Type, Event Type, Notification Type and Request Type.

Roles represent groups of buttons and modules which when associated to a user, grant them access to those buttons and modules. The definition of which buttons or modules is defined in the Role Permissions section detailed below.

Figure 55: Manage Roles



1. To add a new user role, click "+" icon and fill out role name and description and click Create Role.

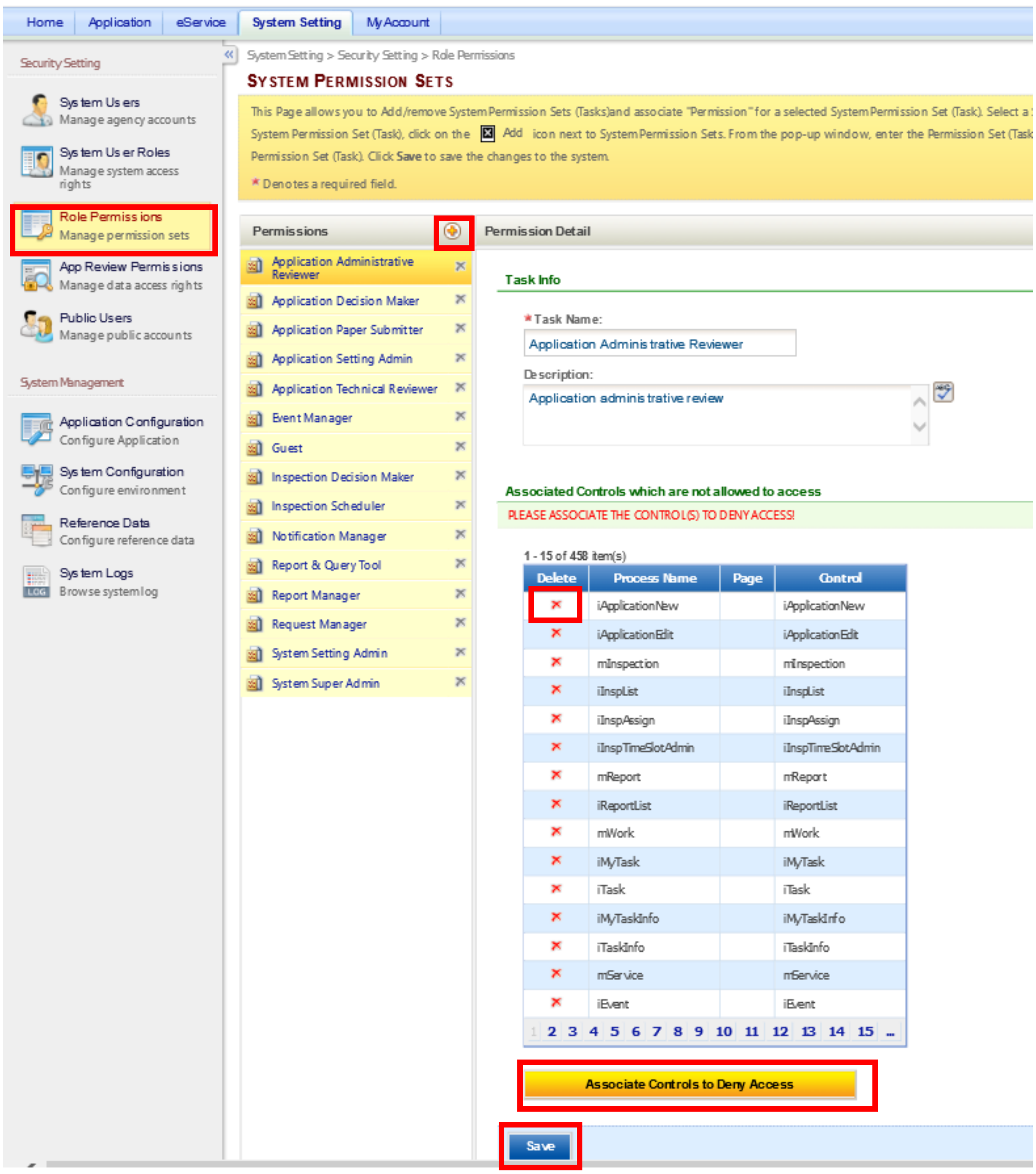
2. Then click “**Associate Users**” button to select users to be associated with the role.
3. Click “**Save Role**” button at the end of the page to save all changes.

5.1.3 Roles Permissions

This module is used to add new role tasks (permission sets) or modify existing role tasks which include modifying the associated permissions (process/page/controls) with this role.

Specifically, this module is used to associate buttons and modules to the roles so that they can be assigned to Users, giving them access to those buttons and modules.

Figure 56: Manage Permission Sets

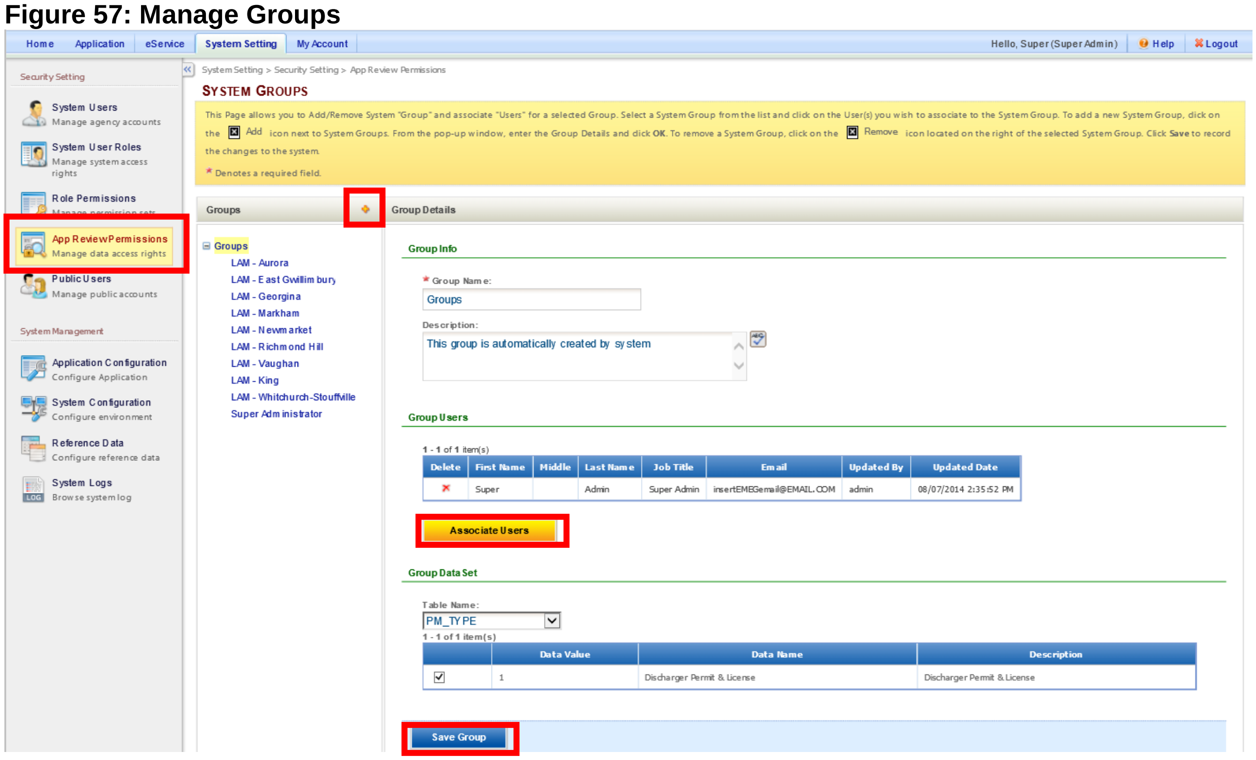


1. To create a new task, click "+" icon and fill out task name and description and click "Create Permission Set".
2. Click "**Associate Controls to Deny Access**" to select desired permissions (process/page/controls) to be associated with the role task.
3. Click "**X**" icon to disassociate associated permissions.
4. Click "**Save**" button at the bottom of the page to save all changes.

5.1.4 App Review Permissions

This is used to add new user group or modify existing user role which includes modify the associated users with the user group. This is mostly used to separate the Municipality users' security rights form the Agency User security rights. Please do not change the name of the LAM – Security Groups.

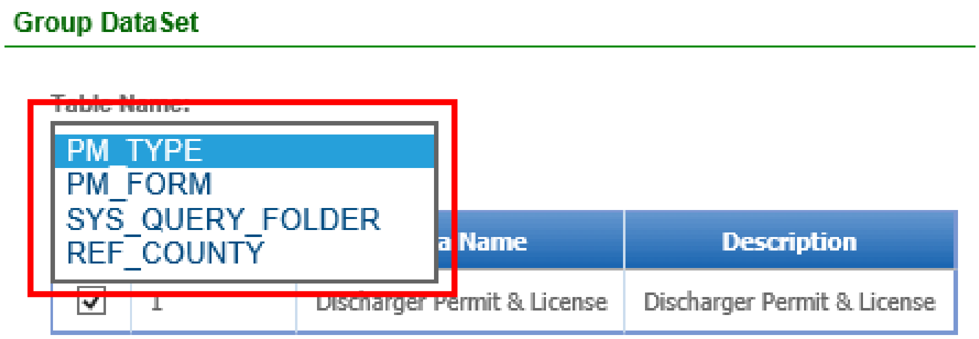
Figure 57: Manage Groups



1. To add a new user group, click "+" icon and fill out group name and description.
2. Then click "**Associate Users**" button to select users to be associated with the group.
3. Click "**Save Group**" button at the end of the page to save all changes.

Group property setting can be set from "Group Data Set" dropdown. For example choose PM_FORM (Permit Type) to set the group property for the associated users who have access rights to the selected application types (DIR, Hauler, Dewatering, Test Results).

Figure 58: Modify Groups



4. Click "**Save Group**" button at the end of the page to save all changes.

Under Group Data Set, we have 4 different categories;

(1) **PM_TYPE** (Permit Type): To set the group property for the associated users who have access rights to the selected permit application types.

(2) **PM_FORM** (Form Type): To set the group property for the associated users who have access rights to the selected application form types.

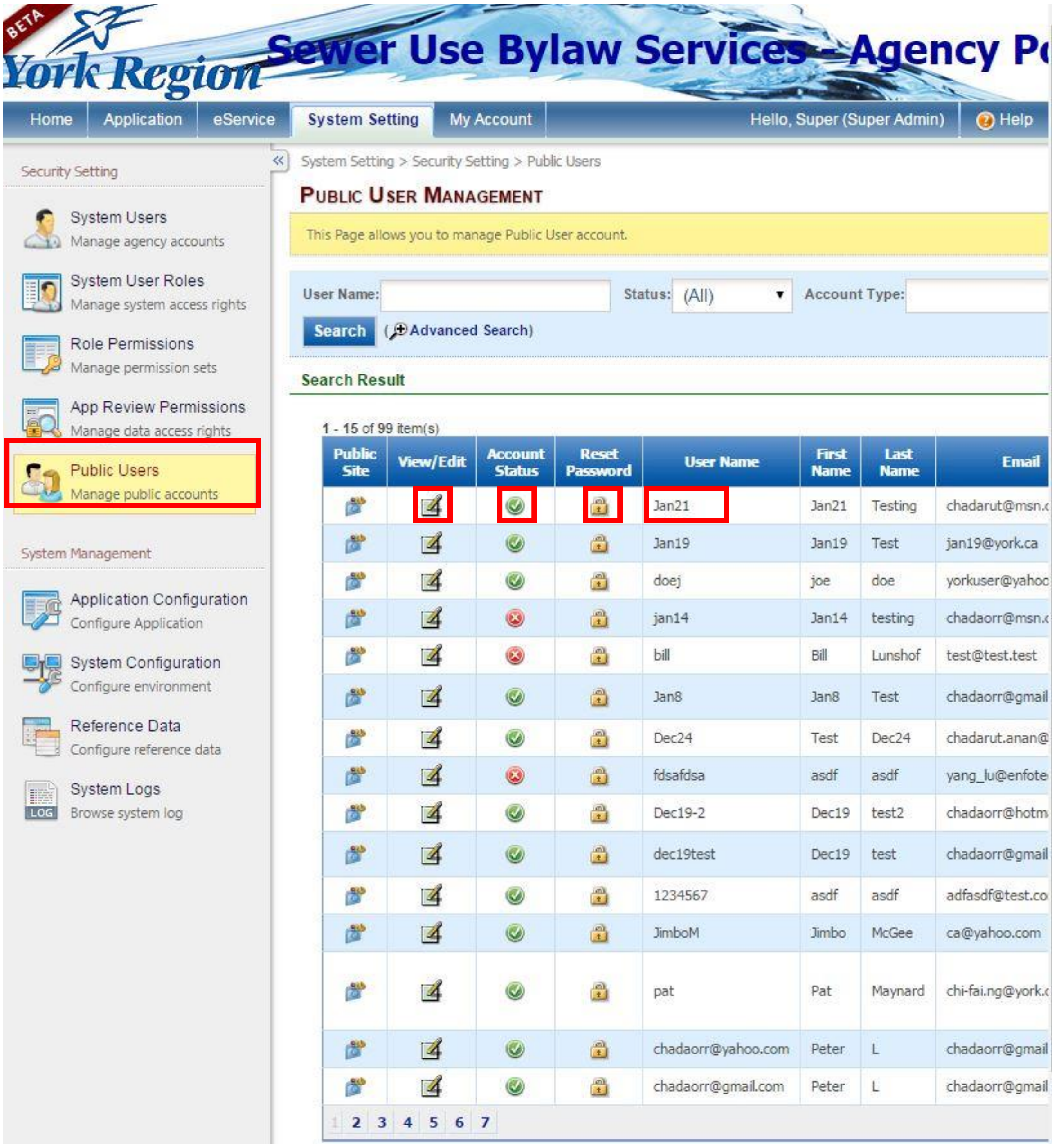
(3) **SYS_QUERY_FOLDER** (Query Folder): To set the group property for the associated users who have access rights to the selected query folders which are presented in the eServices module.

(4) **REF_COUNTY** (LAM Users): To set the group property for the associated users who have access rights to the selected municipalities thus giving them rights to review application and data related to industries in those municipalities. This is most critical for the LAM user security to ensure one municipality is not able to review data of another municipality.

5.1.5 Public User

This is used to activate a new public user, add a new public user or modify an existing public user which includes modifying the user's information, changing their status and resetting their password.

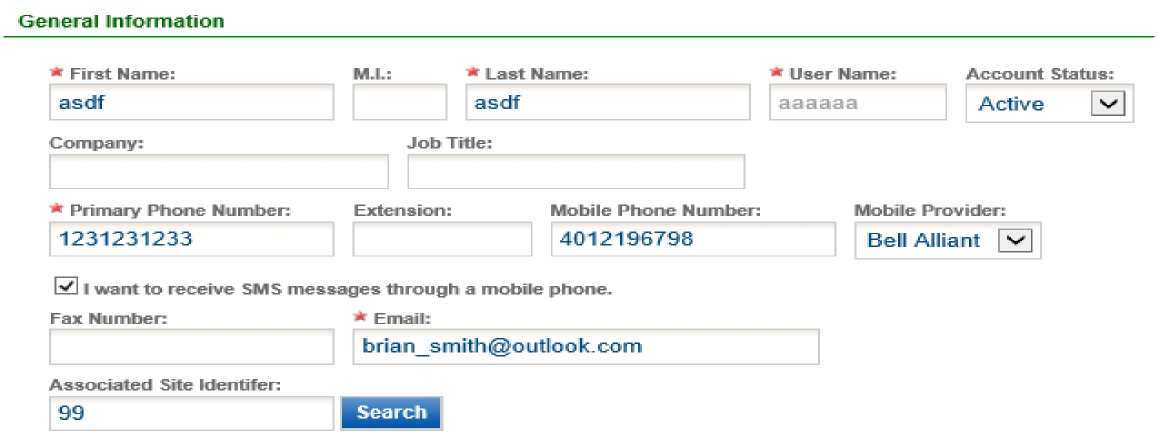
Figure 59: Manage Public Users



1. To add a new role task, click "**Add New**" button and fill out all required user information. Once "**Save**" button is clicked, a randomly generated password will be sent to the user's email address.
2. Once public user created a new account with Sewer Use Bylaw Services website, that user account can be retrieved and activated under this Public User Management. To activate the new public account, click Change Status " " icon, this action will send an email to notify the public user and the icon will be changed to " "

3. To modify an existing agency user, click on View/Edit (" ") icon to select the desired user to update. Once the modification is finished, click "**Save**" to save all changes.
    a. While editing a public account, please ensure that the iPACS Site Identifier field is set correctly. If the field is empty, please click the "Search" button directly to the right of the field. This will open up a search results grid showing data from iPACS that is similar to the "**Company Name**" and Address fields already associated to the public user. Once the correct Facility is found, select the radio button in the grid for that record and click "Save". The Public user page will then refresh and you should see the iPACS Facility ID value in the iPACS Site Identifier field.
    b. For new public users, please review the Municipality text box to ensure its accuracy. This Municipality must exist in the iPACS system and the text entered in this field must match the iPACS data exactly; case sensitivity is important. If the Municipality is not found in the iPACS system, please consult with an iPACS administrator to add this value to the iPACS system.
4. Under search result table, Click Change Status " " icon to change public user's status to inactive and click Reset Password " " icon to reset public user's login password if required.
    a. Alternatively, the status change function can be performed on the Public User Basic Information page (Figure 55).

Figure 60: Public User Basic Information



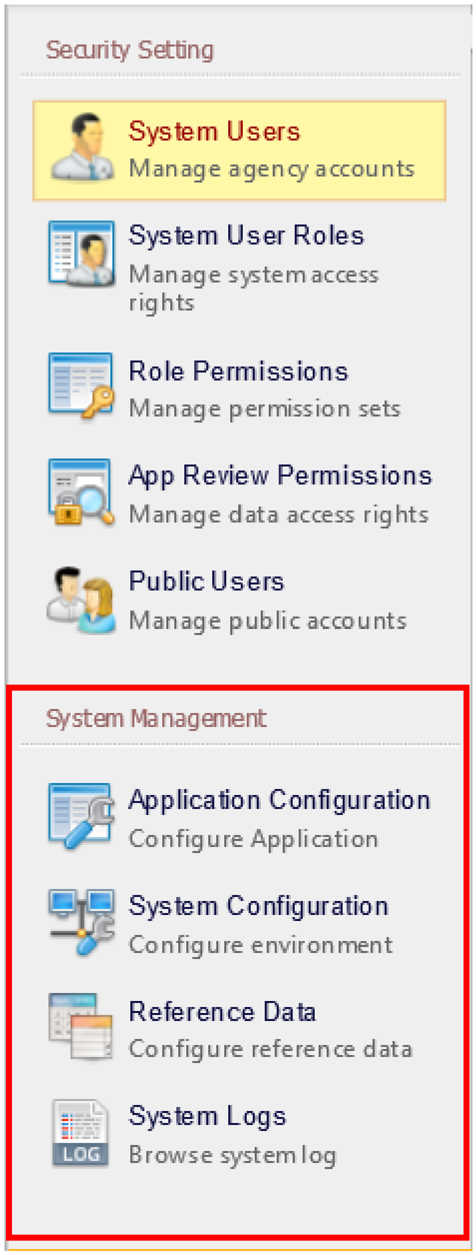
    b. Also, a message can be sent directly to the public user from this screen by using the Template dropdown (optional), Send to Public User comment box, and "Save and Send Message" button. Please review the below screenshot for more information.
        i. Once the "Save and Send Message" button is clicked, an email will be sent to the public user containing the text in the comment box.

Figure 61: Send Email to Public User

5.2 *System Management*

This section is used to set up system level configurations and application level configurations. It can also take care of workflow configuration and system logs. **(Advanced Topic)**

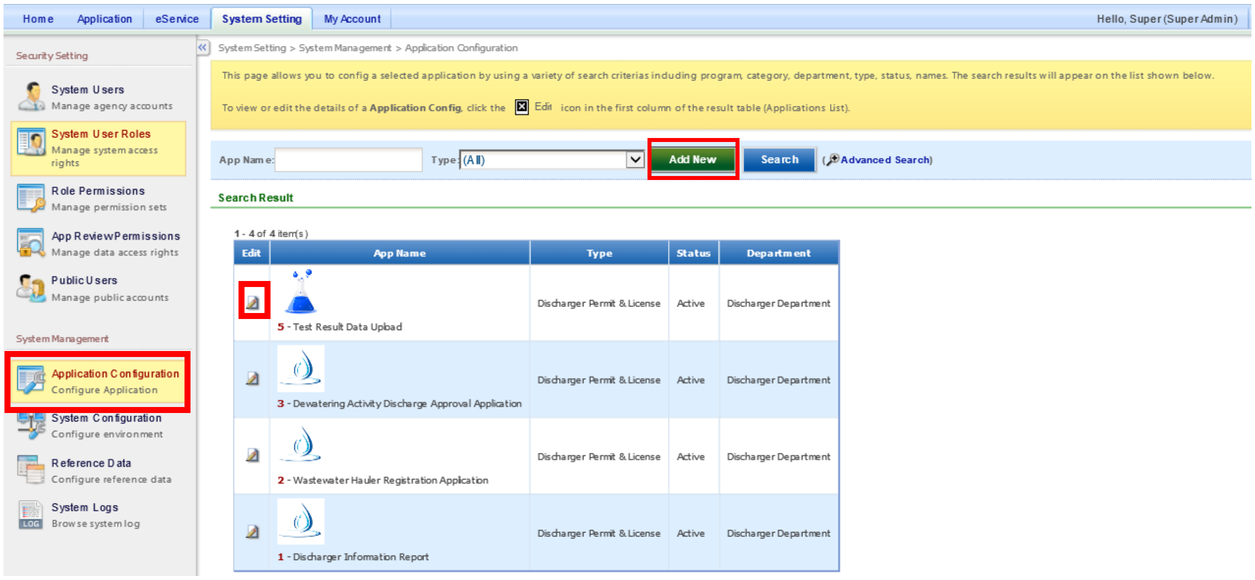
Figure 62: System Management



5.2.1 Application Configuration

This section is used to set up application level configuration. Click "**Add New**" button to add new application configuration that does not include in the list. Or click Edit (" .") icon to modify existing application configuration.

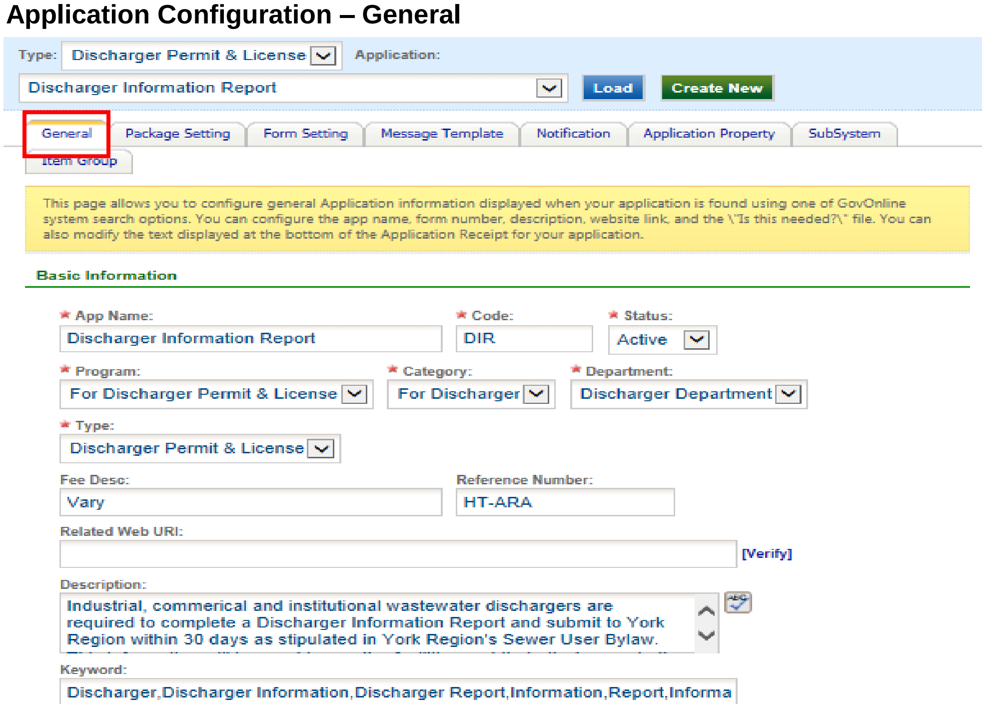
Figure 63: Application Configuration



5.2.1.1 General

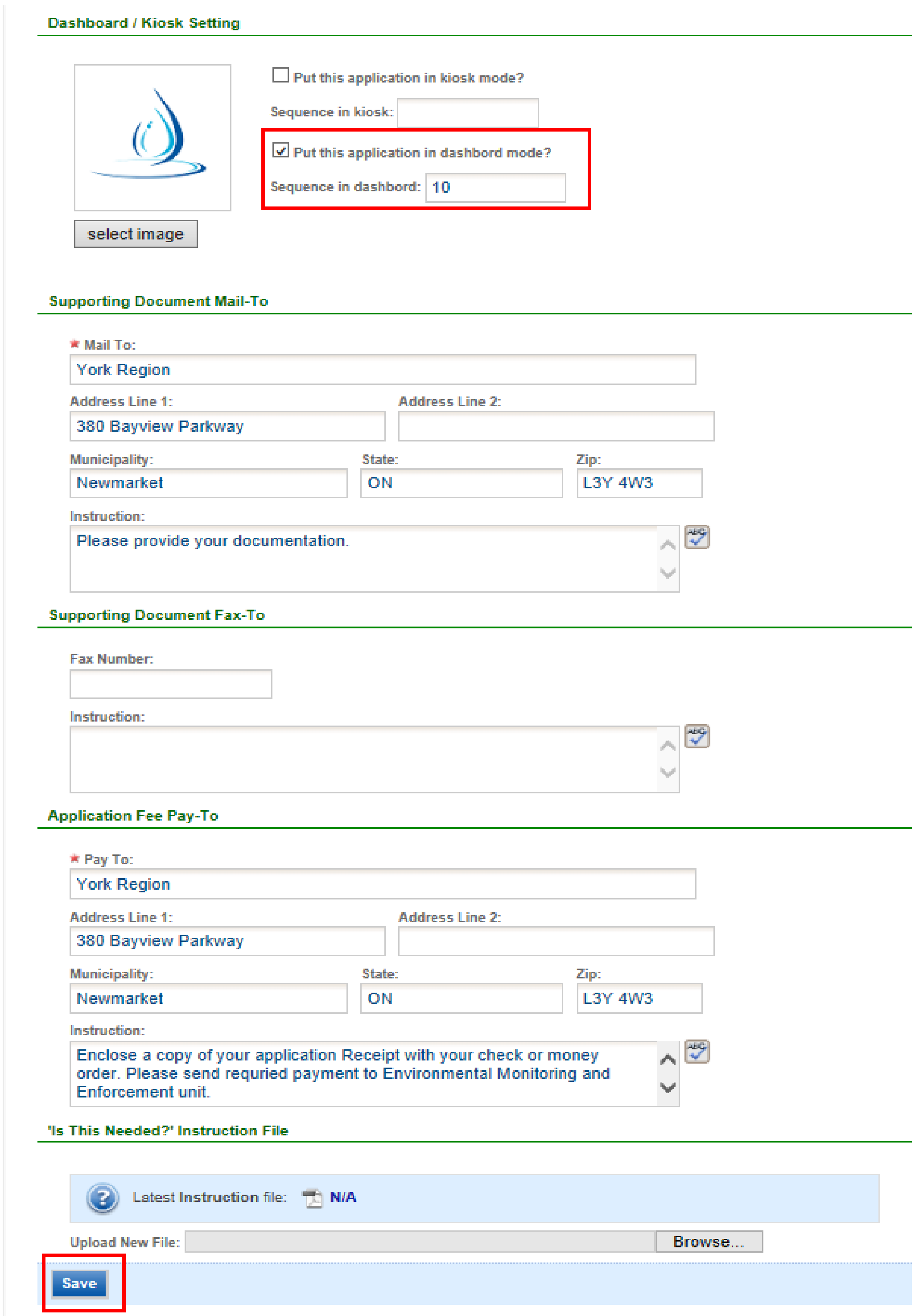
This section is used to set up an application's general configuration. It consists of application information, Dashboard/Kiosk settings, Document Mail-To and fax-to address and fee pay-to (to send check) address. It also provides capability to upload application instruction in **PDF** format.

Figure 64: Application Configuration – General



Most of these settings can be freely changed by the users, but please leave the application in Dashboard mode and do not change the Sequence in Dashboard number. All of these settings are visible to the public user during the process of submitting each of these applications.

After making change, please be sure to click the “Save” button.



5.2.1.2 Package Setting

This section should NOT be changed. The Package settings are not used in York Regions application. Please proceed to the Form Setting section.

5.2.1.3 Form Setting

This section is used to set up application form's configuration. If the attachments or fees are required for the application form, configuration needs to be set here.

- Select the application that need to be setup by click the edit  icon

Figure 65: Application configuration search result

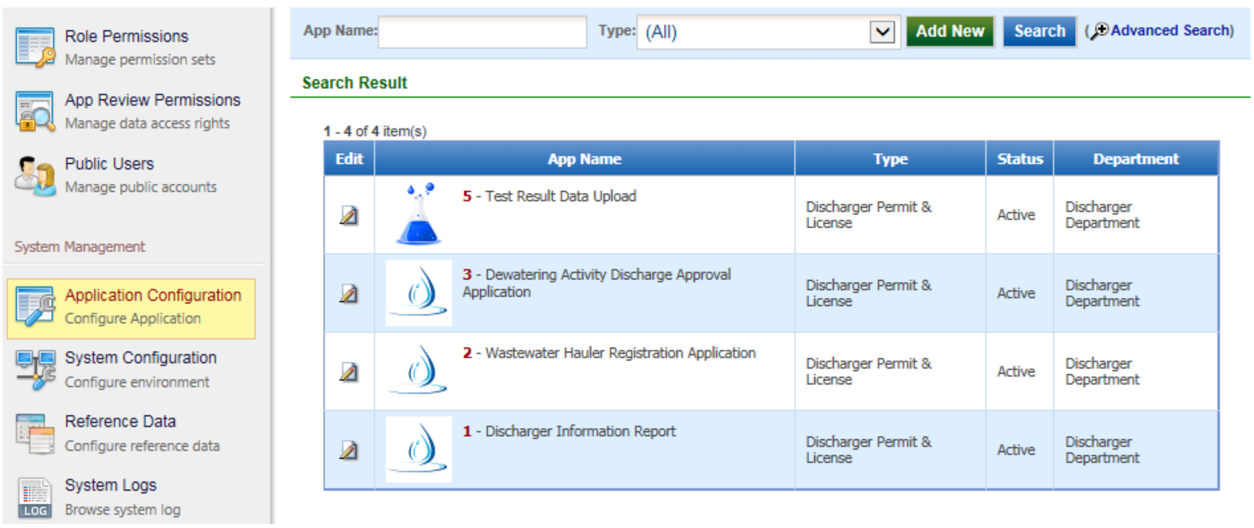
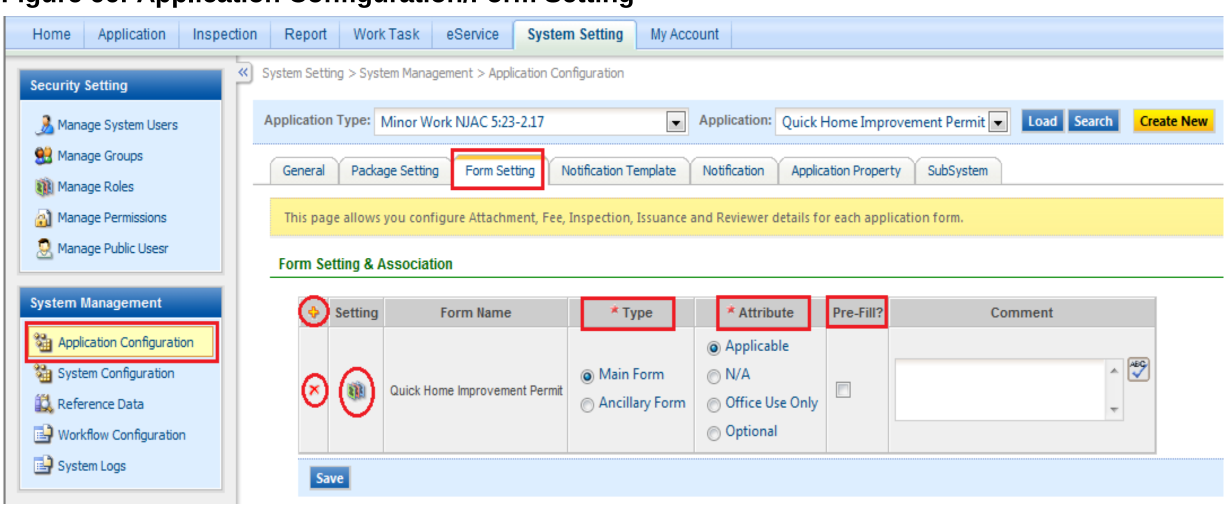
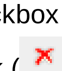


Figure 66: Application Configuration/Form Setting

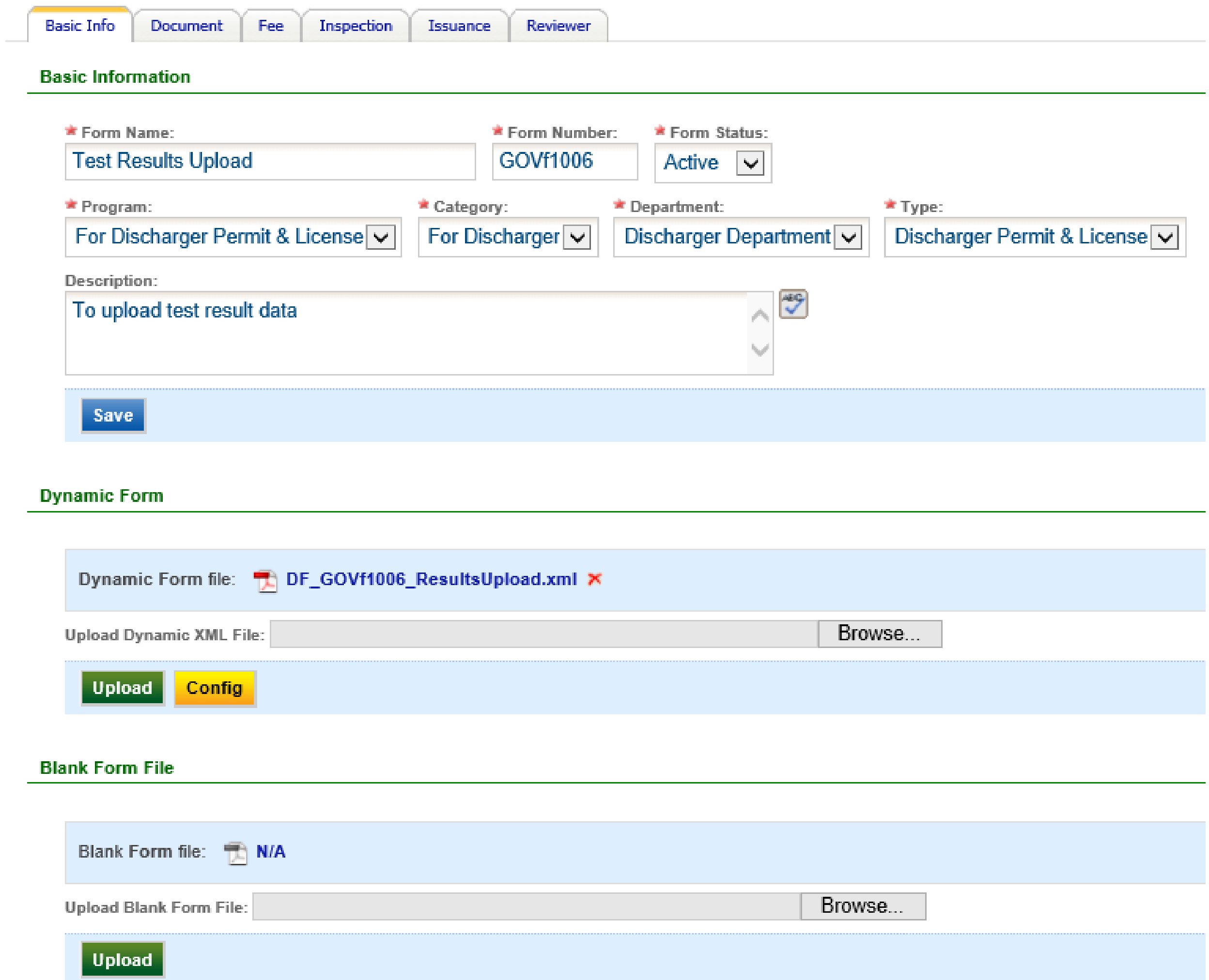


- Click () icon to add additional form for the application package. Form type and attribute fields are required to be specified. Main type form will be displayed for applicant to fill out. If pre-fill checkbox is checked, the form will be pre-filled with stored data.
- Click () icon to delete the selected form.

- Click ( ) icon to modify the selected form.

(1) Basic Info

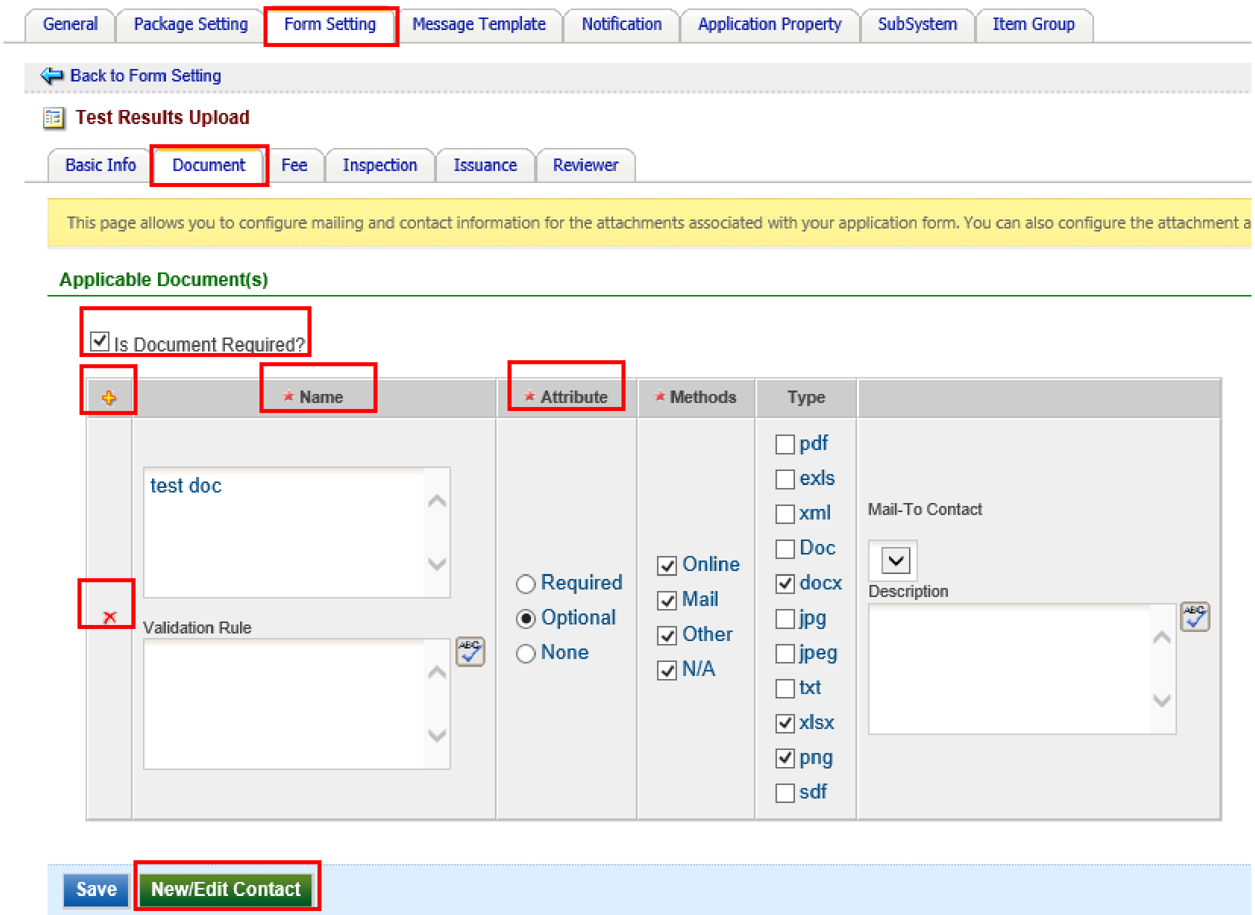
Figure 67: Application Configuration/Form Setting - Basic Info



PLEASE DO NOT ADJUST CONFIGURATION ON THIS SCREEN. THIS IS FOR ADMIN USE ONLY AND CAN GREATLY IMPACT THE SYSTEM.

(2) Document

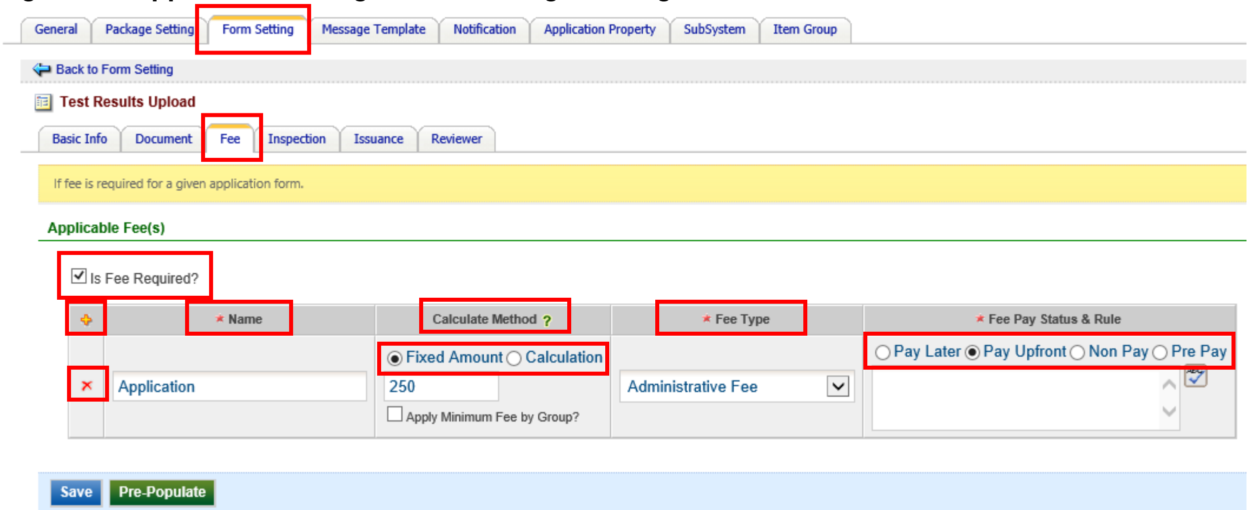
Figure 68: Application Configuration/Form Setting – Document



- Click the checkbox ( ) if the attachment page needs to be displayed for this application.
- Click (New/Edit Contact) icon to add a new attachment mail-to contact or modify existing contact.
- Click ( ) icon to add additional required/optional attachments. Optional mail-to contact can be selected. Attachment name and attribute are required to be specified.
- Select Type checkbox to select type of document accepted online
- Click ( ) icon to delete the selected attachment.
- Select "**Required"** option button if the attachment is required.
- Validation Rule
  a. This is used to define if certain condition must be met (data entered on the application) before this document should be made required for the public user to provide. This should only be configured with assistance from enfoTech.

(3) Fee

Figure 69: Application Configuration/Package Setting – Fee



- Click the checkbox ( ) if the fee page needs to be displayed for this application.
- Click ( ) icon to add additional required fees. Fee name, amount (if fixed, calculated fees are configured in the Reference Data module), fee type, and Fee Pay Status are required fields to be specified.
- Click ( ) icon to delete the selected fee.
- The Fee Pay Statuses Pay Later and Pay Upfront are most likely the only ones to be used
    a. Pay Later means that the amount owed can only be determined at a date after the application is approved such as being dependent on flow or sample result data yet to be collected.
    b. Pay Upfront fees can be calculated while the application is being submitted and must be paid before the application can be approved.

(4) Inspection

This section is not in use for York Regions website.

(5) Issuance

This section is not in use for York Regions website.

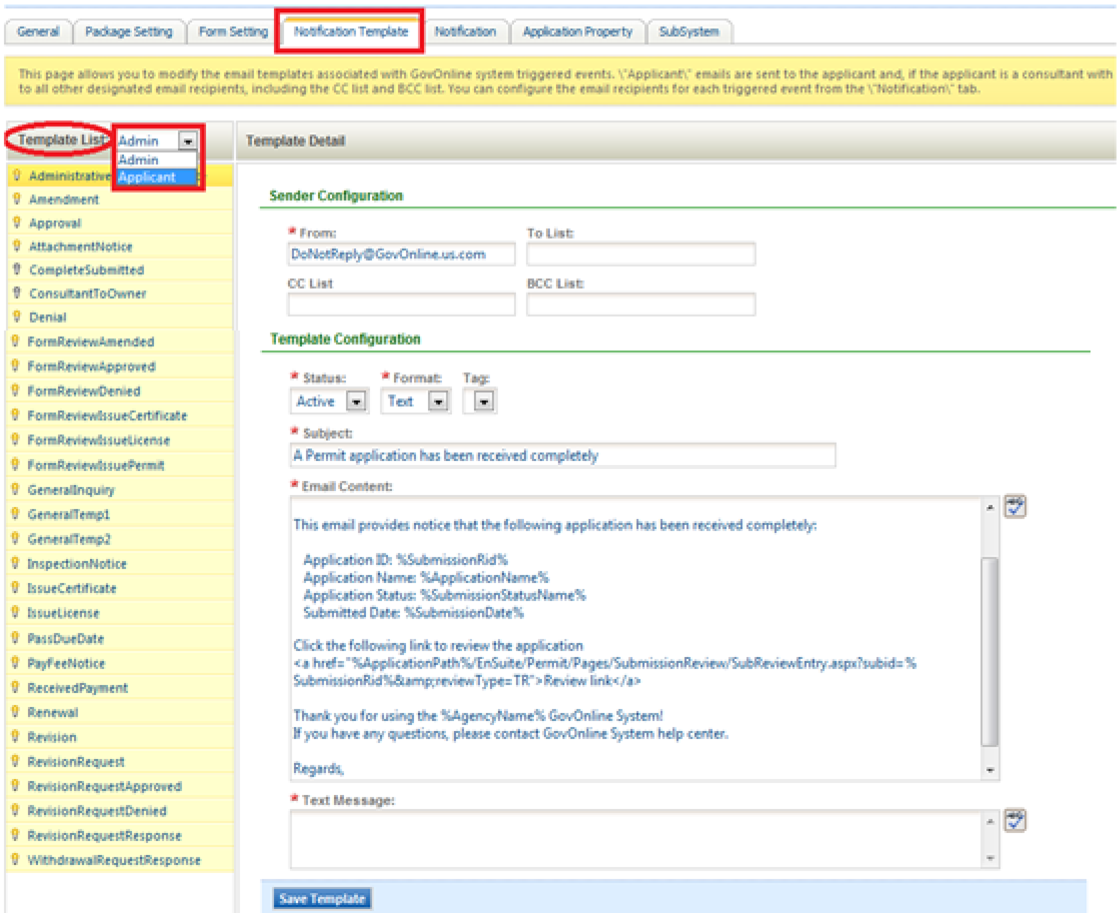
(6) Reviewer

This section is not in use for York Regions website.

5.2.1.4 Message Template

This section is used to set up e-mail message templates for agency and public users. Based on different events (such as approval, denial . . .), different email content text needs to be set up with the Optional text messages that can be set up to send to the Public mobile phone.

Figure 70: Application Configuration/Notification Template

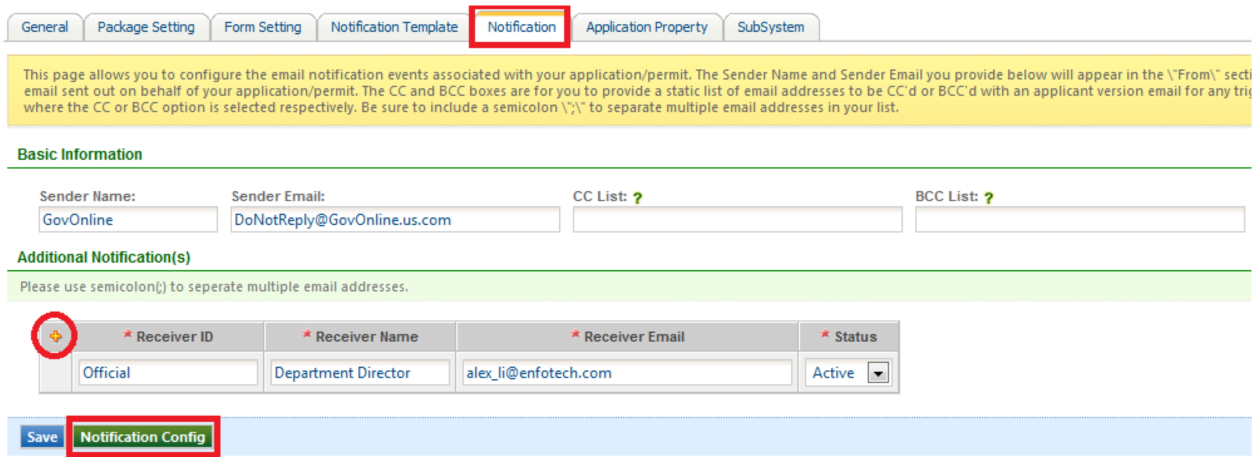


- For each desired notification template, select template item from template list to set up email recipient and content and message text.
- Click “**Admin**/**Applicant**” dropdown to select the notification template type.
- Fill out “**FROM**”, “**TO”** list, “**CC** list”, “**BCC** list”.
- Select status (“**Active**” or “**Inactive**”); format (“**Text**” or “**HTML**”).
- Fill out email content and text message.
- Click “**Save Template**” to save all changes.

5.2.1.5 Notification

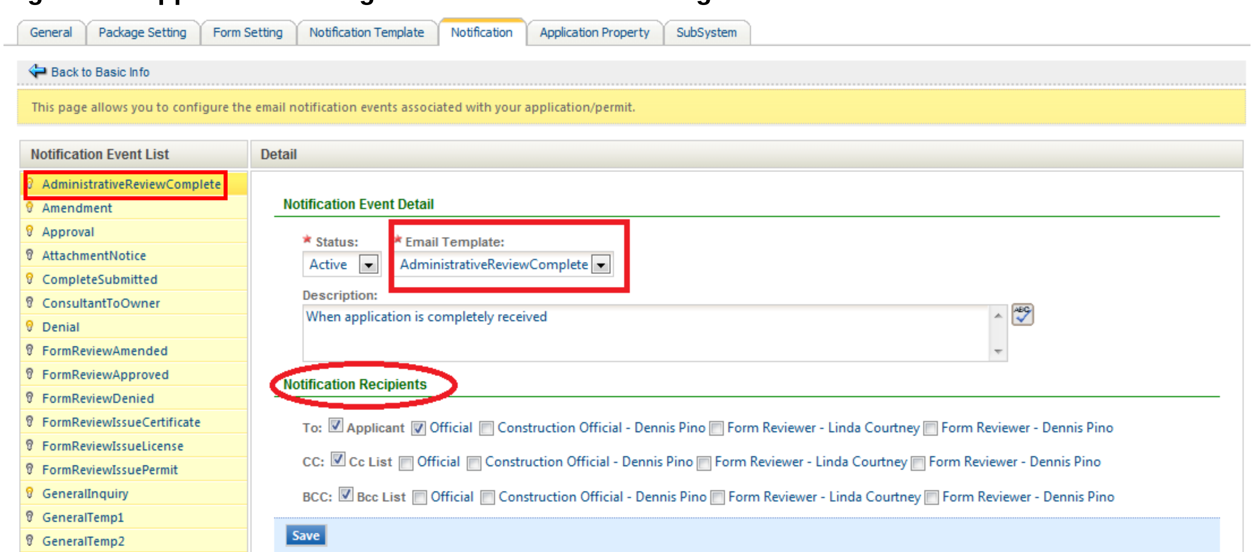
This section is used to set up notification's configuration. This is used to configure the "From" address for all emails sent from the system. If a user is added to the Additional Nonfiction(s) section, they will receive a copy of all/some of the emails sent from the system. Which emails they are copied on are configured in the "Notification Config" section below.

Figure 71: Application Configuration/Notification



- Click (Notification Config) icon to configure notification event.

Figure 72: Application Configuration/Notification Configuration

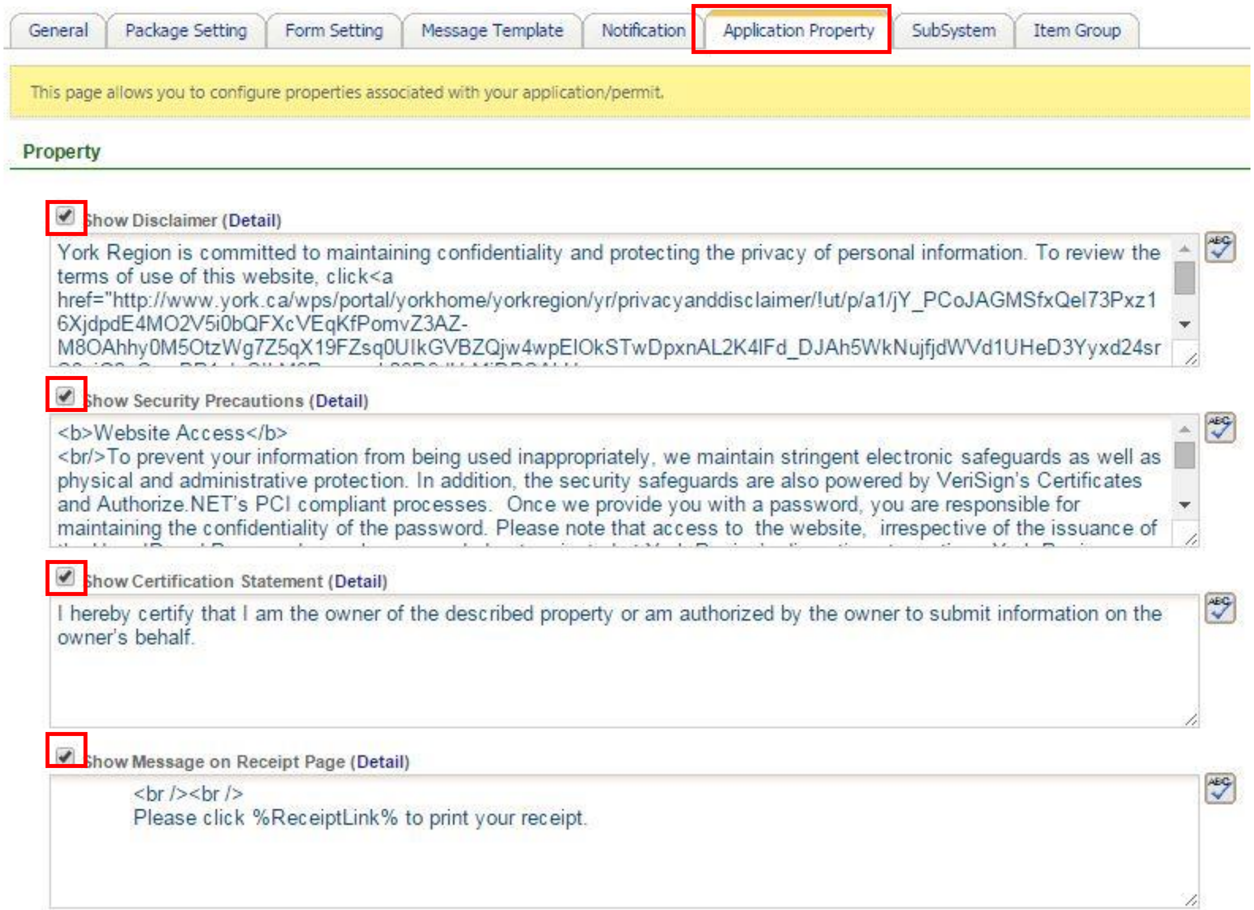


- Select the notification events from the list
- Select email template from email template dropdown for the notification event.
- Select the notification recipients for the notification event. All agency staff who was given access rights will be shown to be selected.

5.2.1.6 Application Property

The configurations in this section are critical to the application proper functioning and should only be updated by staff at enfoTech. Please do not make updates to this page.

Figure 73: Application Configuration/Application Property



5.2.1.7 Subsystem

This section is used to set up the application package's integration with a subsystem. This is used for transferring Permit to or from another system and is not used in York Regions application.

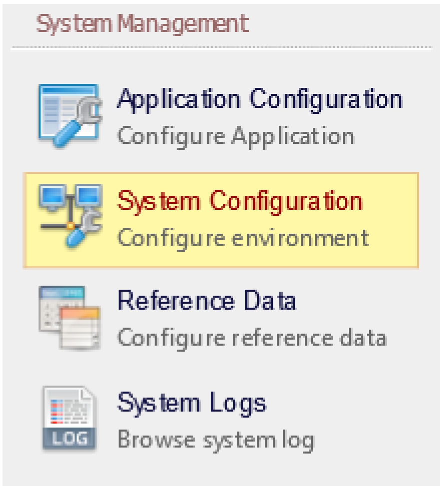
5.2.1.8 Item Group

This section is not in use for York Regions website.

5.2.2 System Configuration

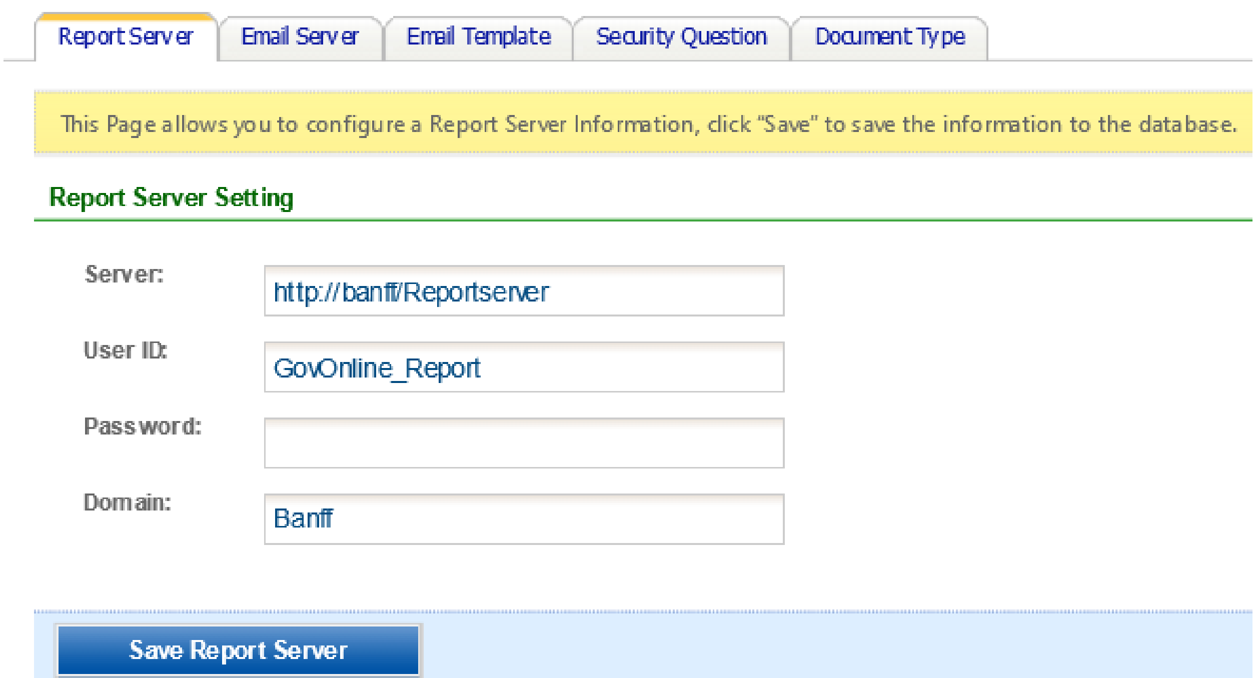
This section is used to set up system level configurations. It can configure email and report servers, email templates, Security Questions, and Document Types supported by the system.

Figure 74: System Configuration



5.2.2.1 Report Server

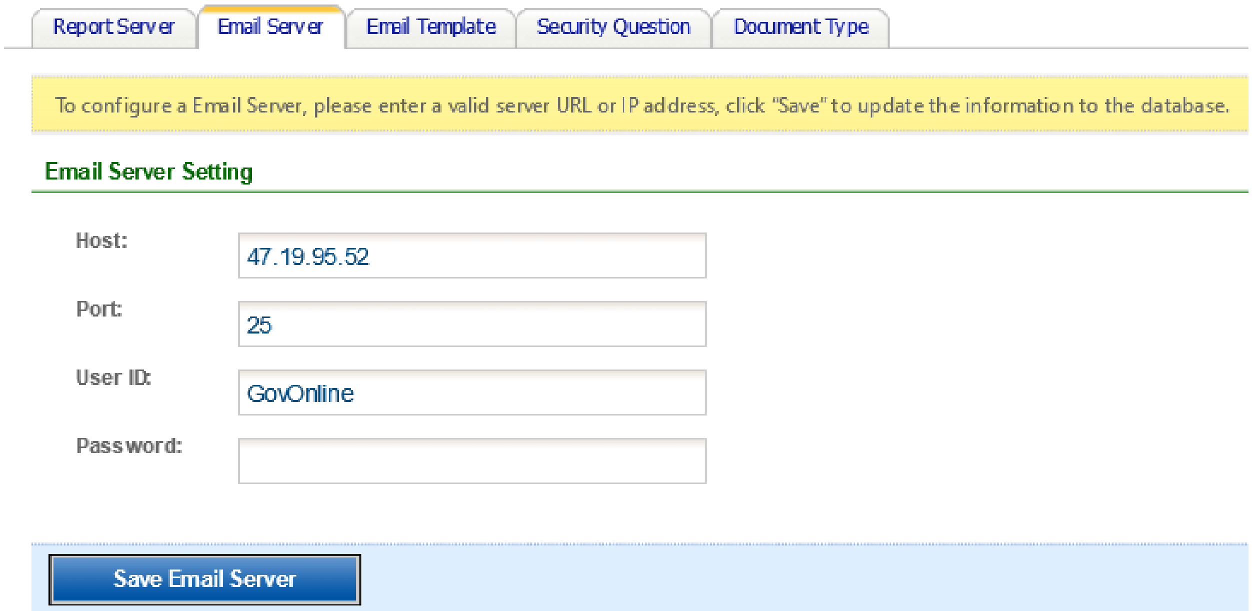
Figure 75: System Configuration/Report Server



- Specify report server's name, ID, password and domain to be able to show report.

5.2.2.2 Email Server

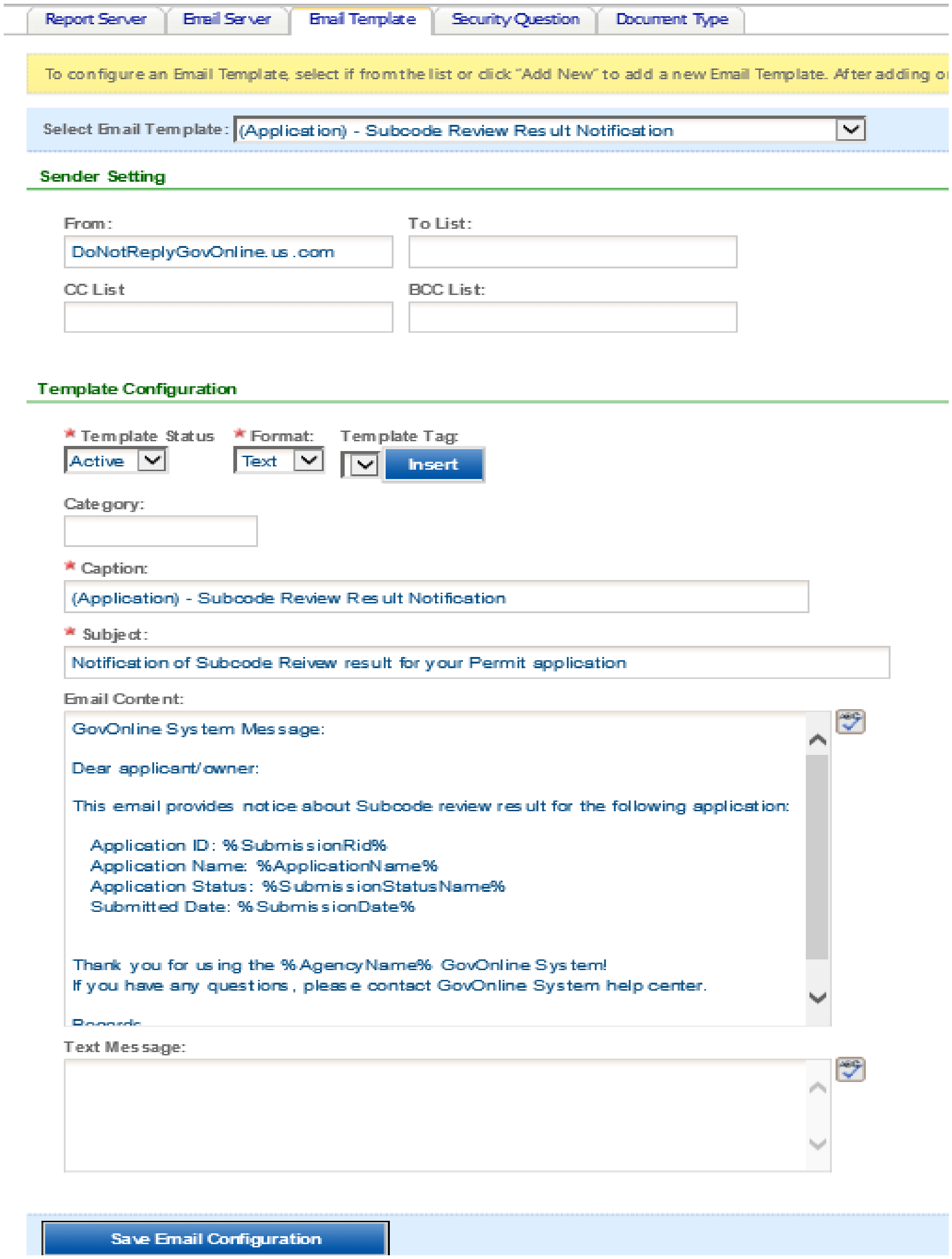
Figure 76: System Configuration/Email Server



- Specify email server's host name, port, ID and password to be able to send emails.

5.2.2.3 Email Template

Figure 77: System Configuration/Email Template



- For each desired email template, select template item from template dropdown.
- Fill out "**FROM**", "**To** list", "**CC** list", "**BCC** list".
- Select status ("**Active**" or "**Inactive**"); format ("**Text**" or "**HTML**").
- Fill out email content and text message.
- Click "**Save Email Configuration**" to save all changes.

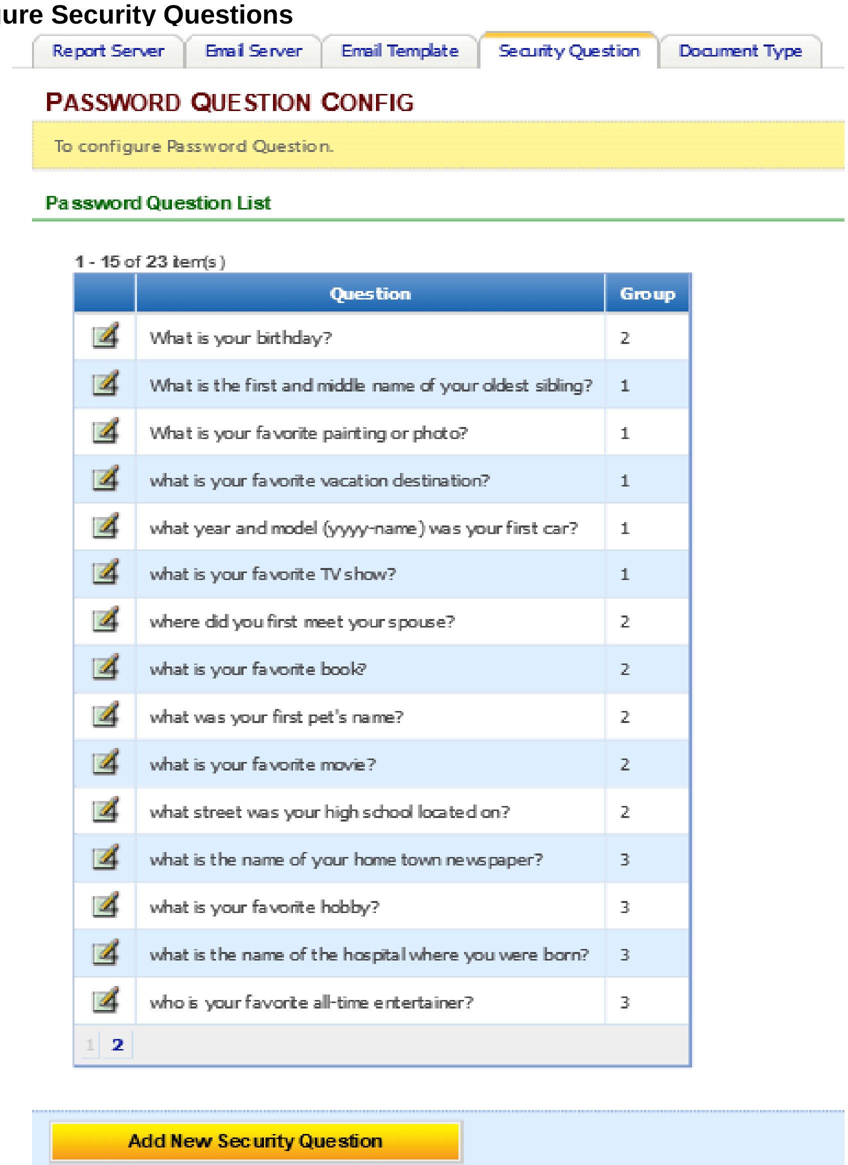
5.2.2.4 Security Questions

When a public user first creates their account, they will be asked a set of security questions. Which questions they will see are configured on this screen.

To update or delete a security question, click the button which will refresh that row and display a set of buttons to either save your changes or delete the security question.

The configuration for groups allow the questions to be setup in a series that is randomly chosen for each new user that is creating an account. There should be at least 3 question per group and at least 1 group configured.

Figure 78: Configure Security Questions



	Question	Group
	What is your birthday?	2
	What is the first and middle name of your oldest sibling?	1
	What is your favorite painting or photo?	1
	what is your favorite vacation destination?	1
	what year and model (yyyy-name) was your first car?	1
	what is your favorite TV show?	1
	where did you first meet your spouse?	2
	what is your favorite book?	2
	what was your first pet's name?	2
	what is your favorite movie?	2
	what street was your high school located on?	2
	what is the name of your home town newspaper?	3
	what is your favorite hobby?	3
	what is the name of the hospital where you were born?	3
	who is your favorite all-time entertainer?	3

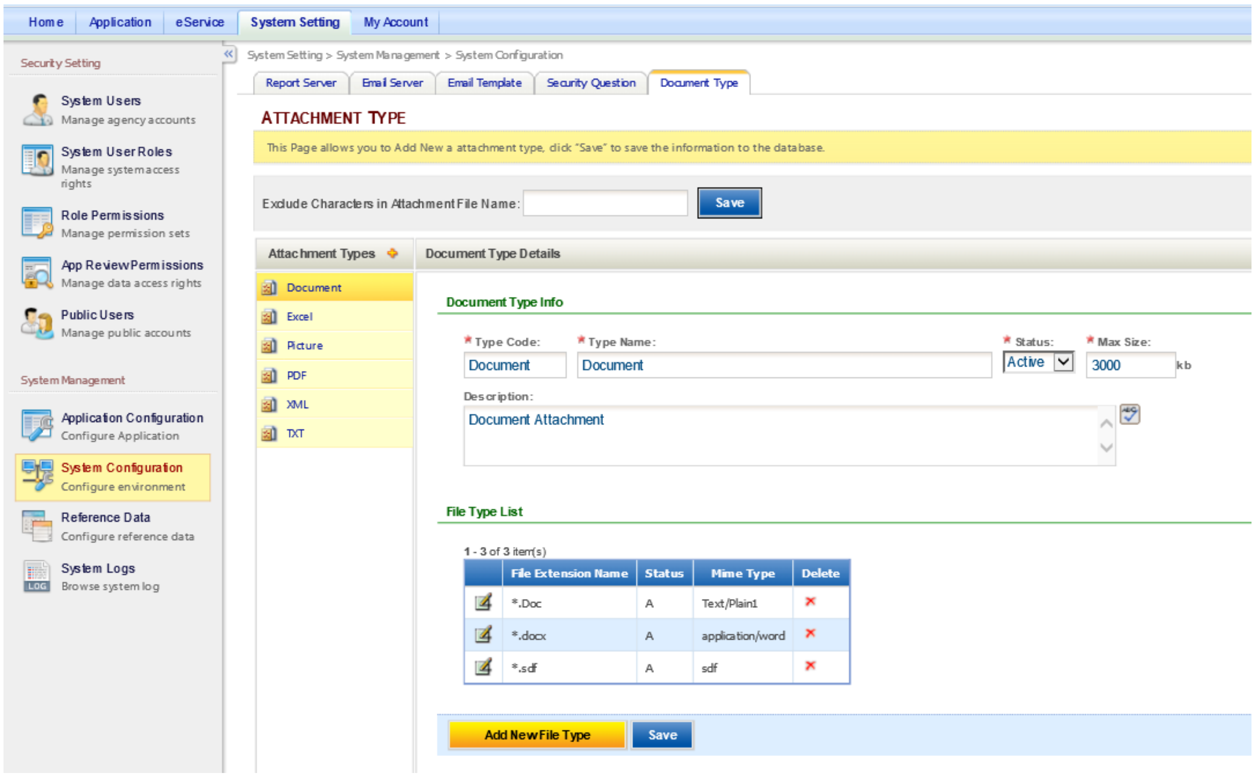
5.2.2.5 Document Type

In this section, you will be able to add additional files types which represent the selection of files that will be allowed to be uploaded with applications.

The Document types are arranged into groups such as “Document” which includes both .DOC and .DOCX as valid file types. You most likely won’t need to add new “Attachment Types” (click the button to do this), but you may need to add new extensions to an attachment type, such as when the Office .DOCX was established.

To add a new File Type (Extension), click the Add New File Type button. In the following popup, put the extension in the File Type box, but leave out the preceding “.” (example, enter “DOCX” not “.DOCX”). The Status field determines if the file type is still valid and the Mime type determines how the extension is aved in the data for other applicatino to understand which application to use to open the file. Please consult with enfoTech before changing or adding a new Mime Type.

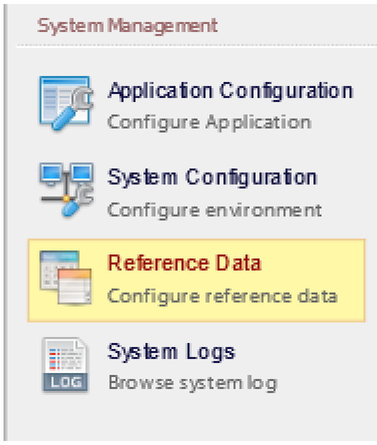
Figure 79: Configure Document Types



5.2.3 Reference Data

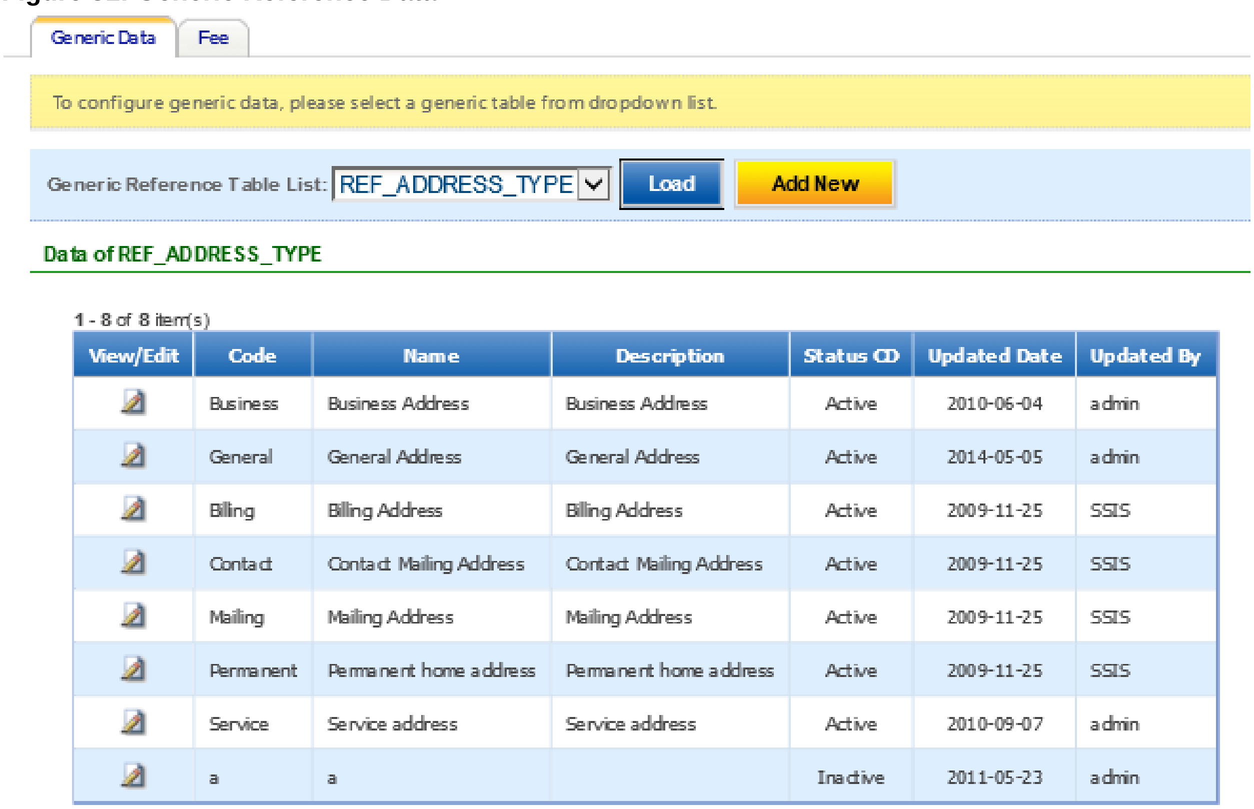
This section is used to manipulate all types of reference data which includes fee data configuration, It also includes event category, inspection category, comment template, statute code and work items.

Figure 80: Reference Data



5.2.3.1 Generic Data

Figure 81: Generic Reference Data



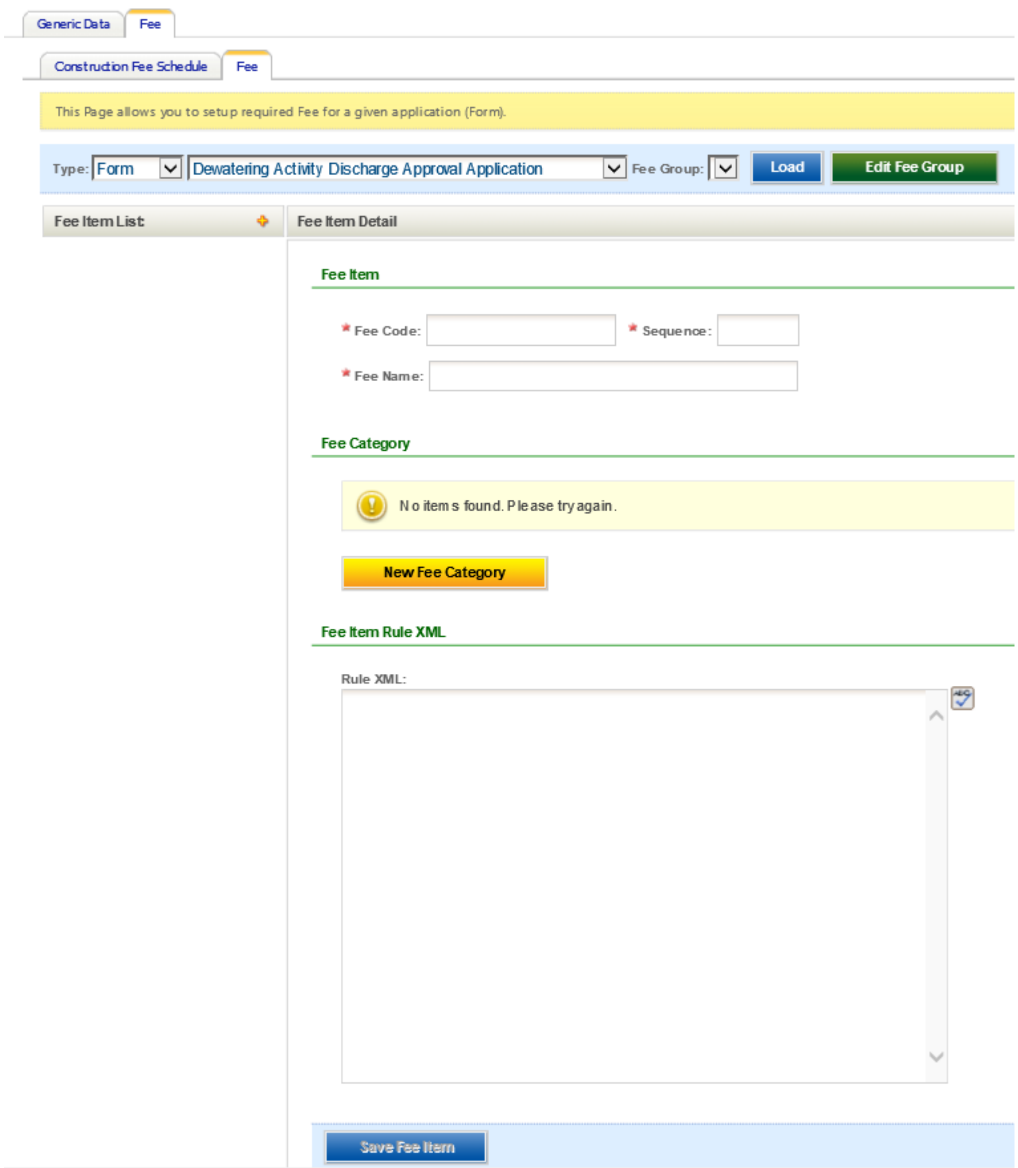
View/Edit	Code	Name	Description	Status CD	Updated Date	Updated By
	Business	Business Address	Business Address	Active	2010-06-04	admin
	General	General Address	General Address	Active	2014-05-05	admin
	Billing	Billing Address	Billing Address	Active	2009-11-25	SSIS
	Contact	Contact Mailing Address	Contact Mailing Address	Active	2009-11-25	SSIS
	Mailing	Mailing Address	Mailing Address	Active	2009-11-25	SSIS
	Permanent	Permanent home address	Permanent home address	Active	2009-11-25	SSIS
	Service	Service address	Service address	Active	2010-09-07	admin
	a	a		Inactive	2011-05-23	admin

- Use the Reference Table List dropdown to filter various reference tables in York Region Sewer Use Bylaw Services to configure the values stored in that table. The page will refresh as a value is chosen.
- Click Add New ( ) button to add a new value to the reference table selected.
- Click edit ( ) to add/edit/inactivate data of any existing reference data for the table selected.

5.2.3.2 Fee

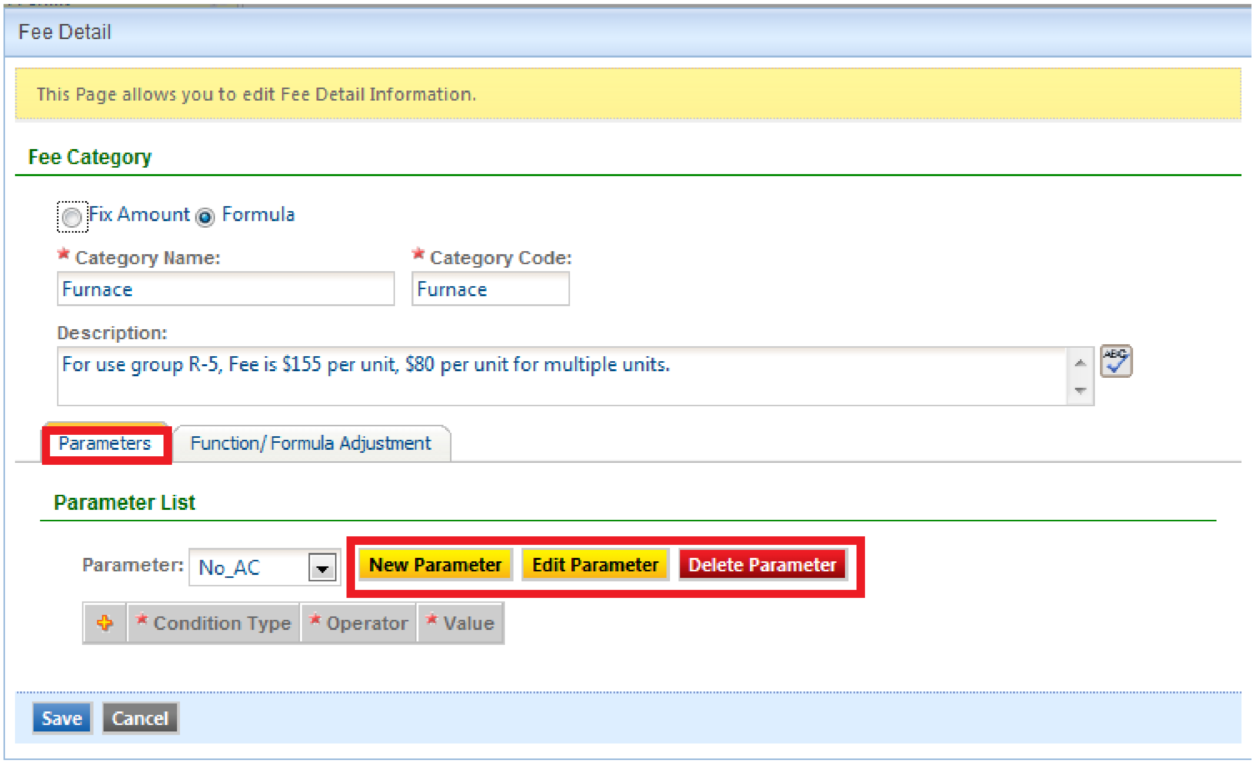
This module should only be used by users specifically trained for its use. To configure a fee calculation, it requires specific technical knowledge that should only be attempted by an IT professional. If a fee calculation needs to be updated, please consult with your support IT staff or enfoTech directly to perform the necessary changes.

Figure 82: Configure Fees



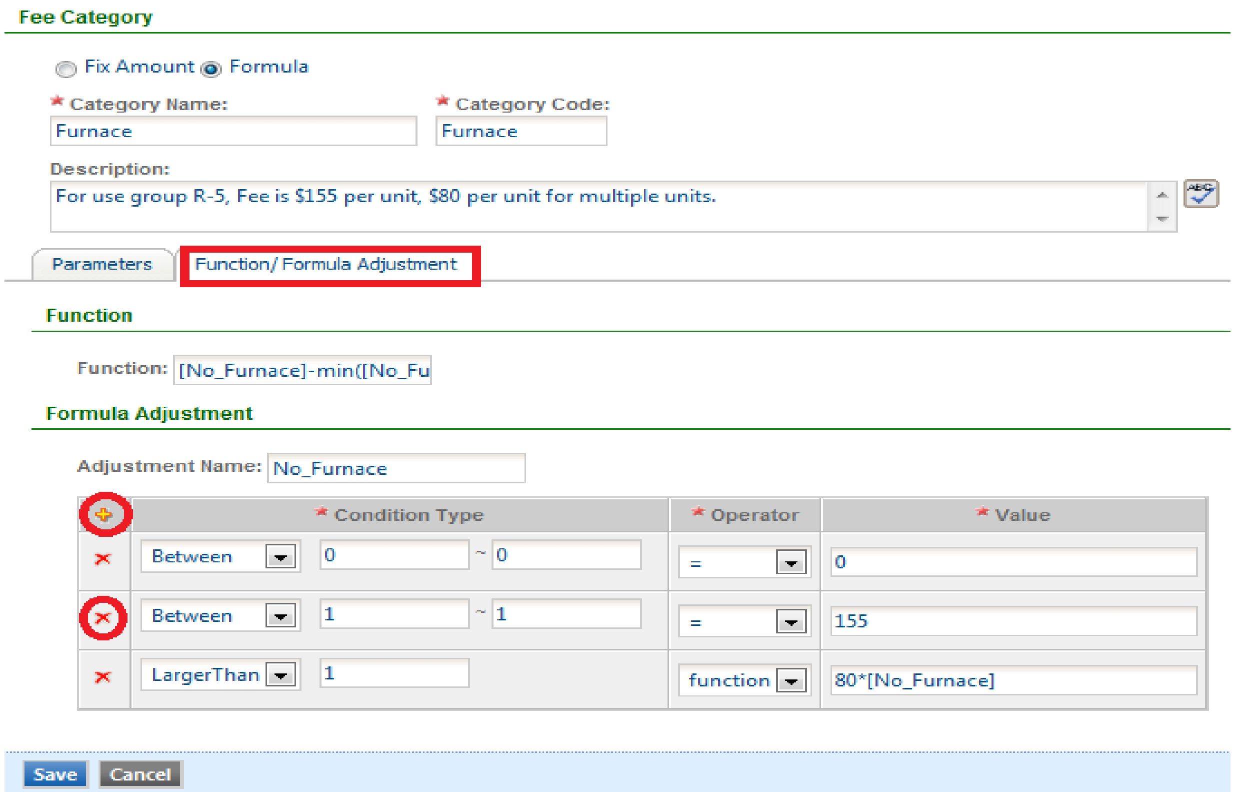
- Click Add New (New Fee Category) button to add new fee category.
- Click edit ( ) to edit any existing fee category.
- Click ( ) icon to delete the selected fee category.

Figure 83: Reference Data/Fee Config - Fee Parameter



- Click Add New (New Parameter) button to add new fee parameter.
- Click edit (Edit Parameter) to edit any existing fee parameter.
- Click (Delete Parameter) icon to delete the selected fee parameter.

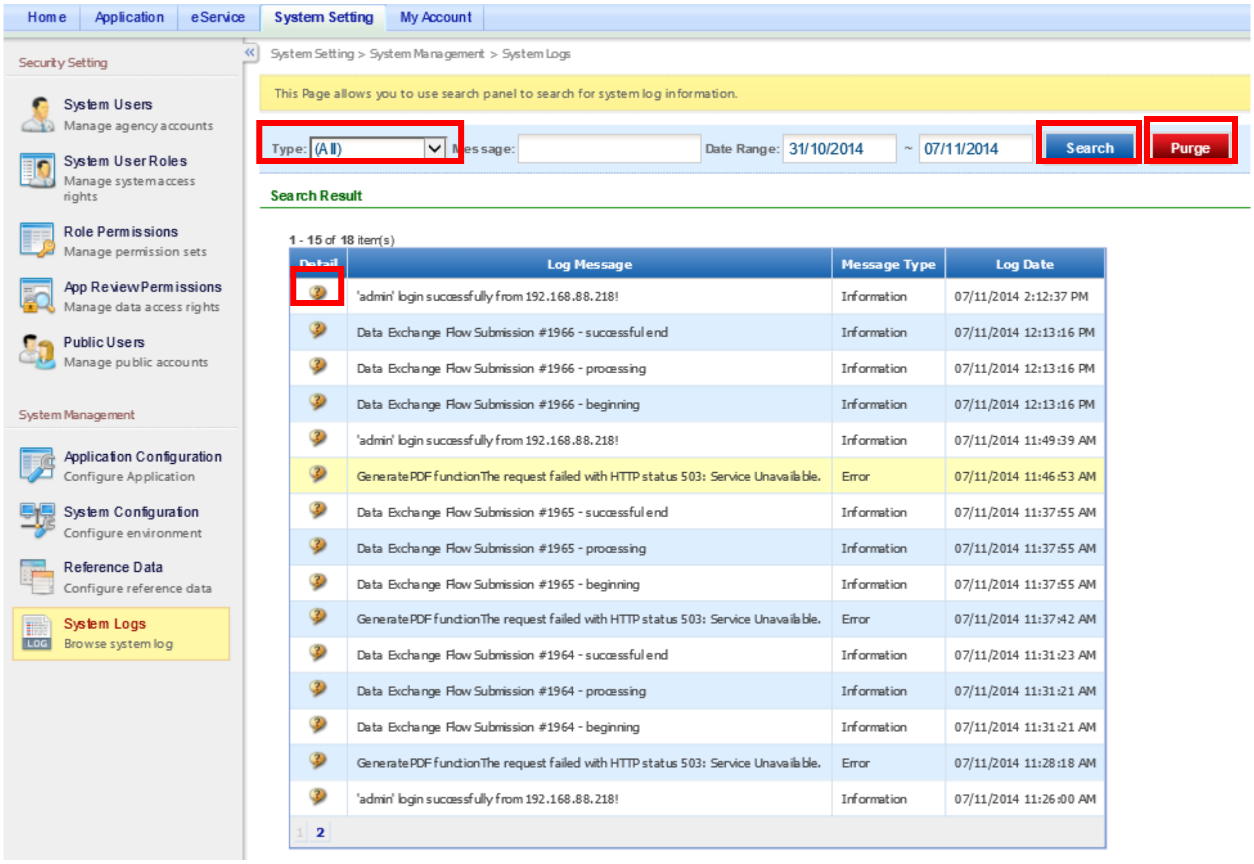
Figure 84: Reference Data/Fee Config - Fee Formula

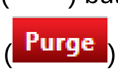


- Click Add New ( ) button to add new fee formula.
- Click “**Save**” button to save any updated fee formula information.
- Click ( ) icon to delete the selected fee formula.

5.2.4 System Logs

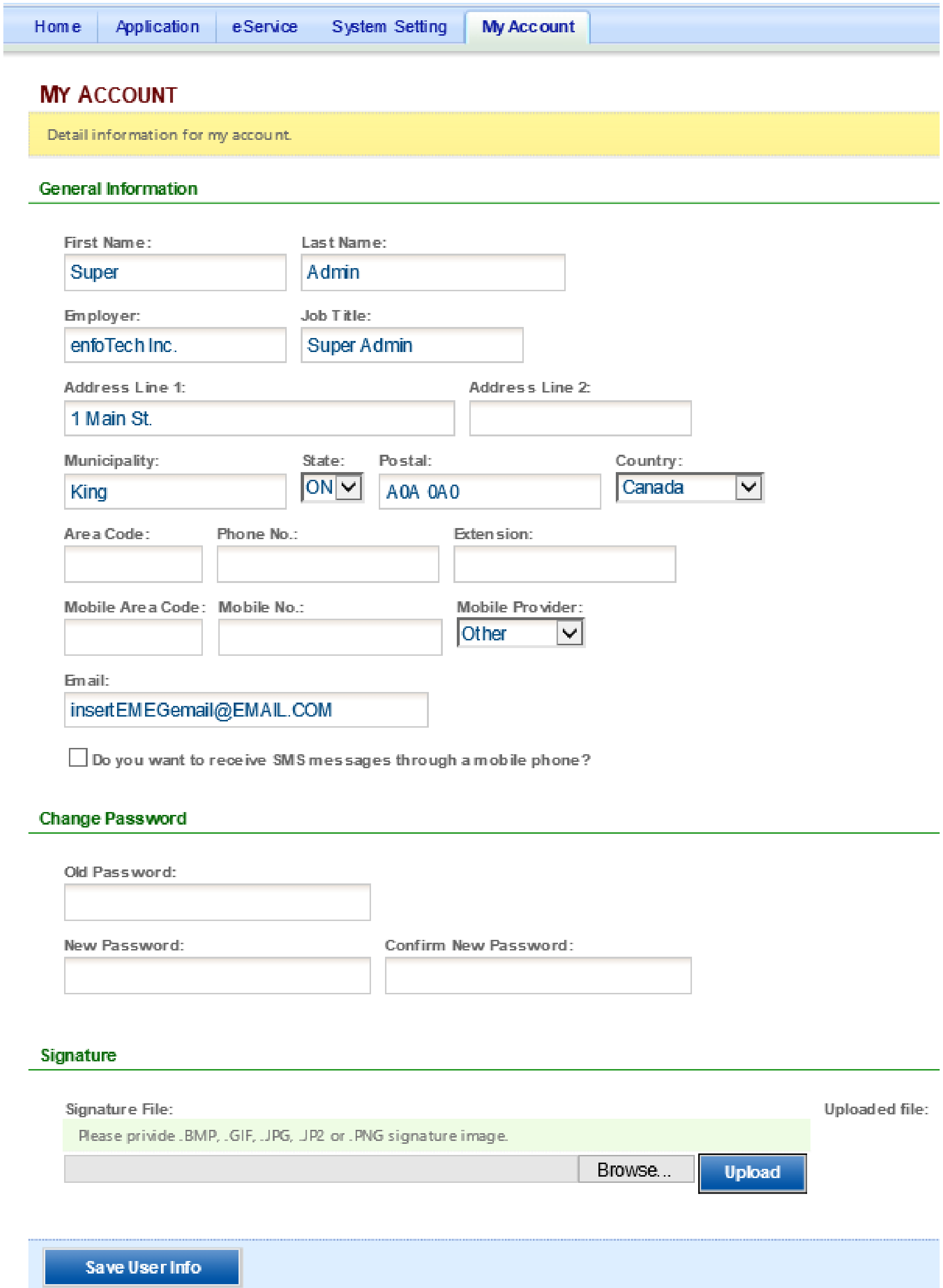
Figure 85: System Logs



- Provide message type and date range, then click Search () button to retrieve desired system messages.
- Click Detail () button to view detail information on selected message.
- Click Purge () button to purge selected message.

6 My Account

Figure 86: My Account



- Provide mobile number, provider and check on the checkbox to be able to receive text message.
- Provide old and new password to change the old password to new password.