SEWER USE BYLAW SERVICES AGENCY PORTAL – LM USERS

Reference Guide

Version: 1.4

January 23, 2015

17250 Yonge Street, Newmarket, ON L3Y 4W5

Restriction on Use and Disclosure of Document Information

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1 Login to York Region Citrix

1. Access York Region Citrix – enter http://www.york.ca/eservices in a browser (Internet Explorer 9 or higher, Google Chrome, or Firefox) and click on "Access Your Anywhere eDesktop" as shown in screenshot below-figure 1:

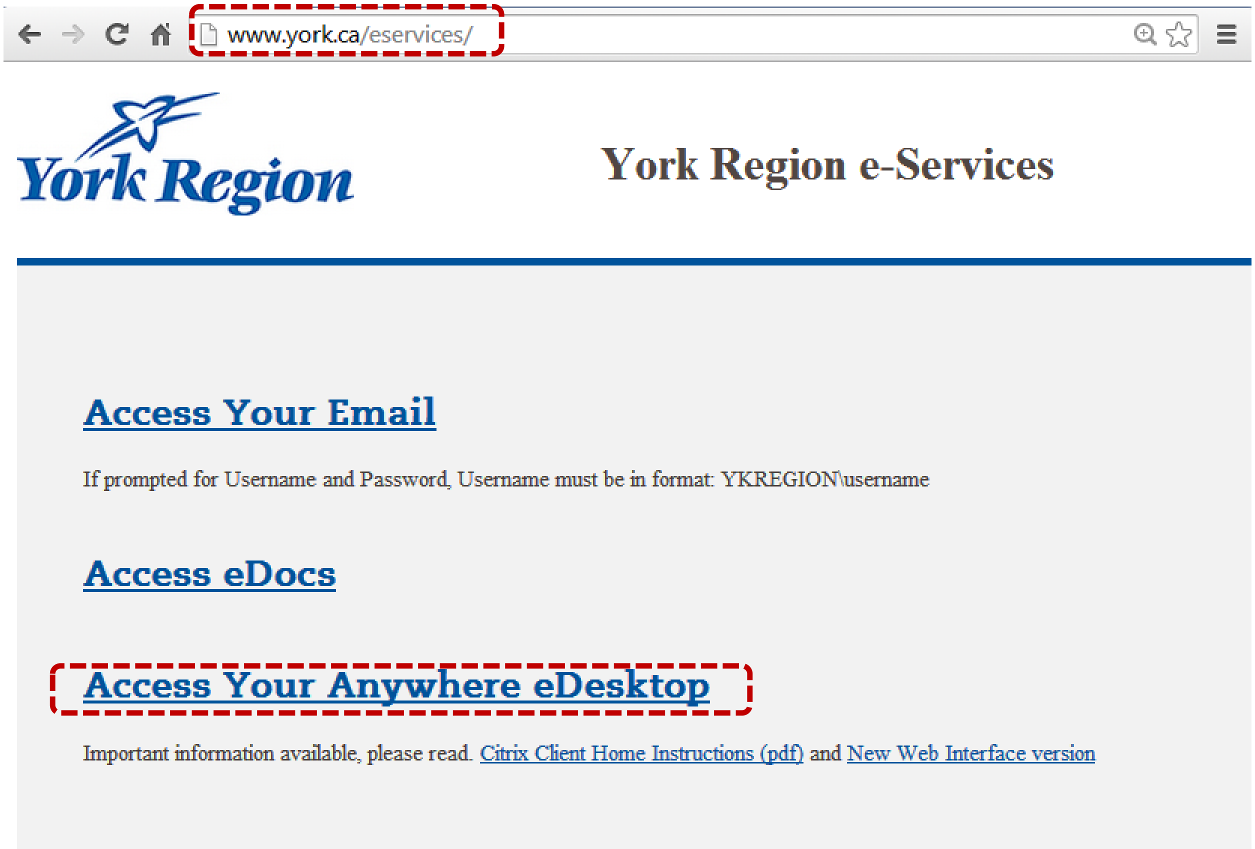


Figure 1 - York Region eServices

2. Enter provided user name and password to the corresponding fields as shown below, then click on "Log On" button:

Note: you may be prompted to install Citrix client, please follow the instructions shown on your screen to install the required software (Citrix Receiver).

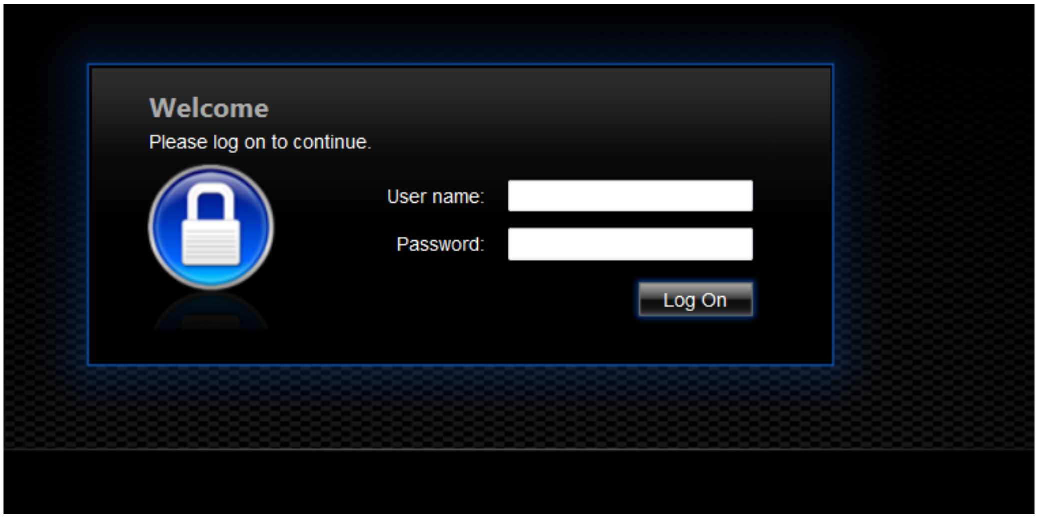


Figure 2 - York Region eServices - Login Credentials

3. Once logged-in to Citrix, double click on the Internet Explore icon on the eDesktop:

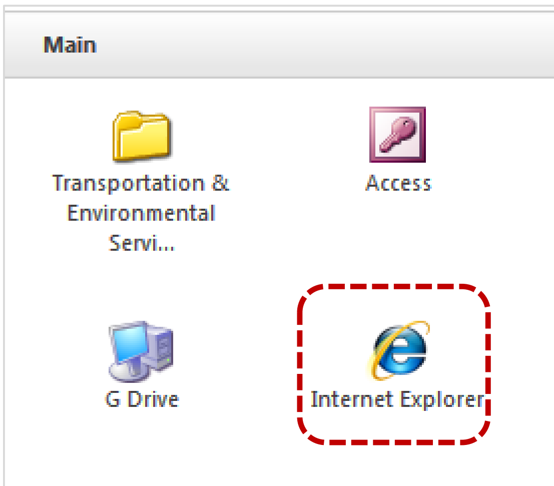


Figure 3 - Citrix eDesktop - Open Internet Explorer

4. Enter the following URL for
   a. Sewer Use Bylaw Services Agency Portal -- http://govonlinedevadm.devyork.ca/GovOnline_AGENCY/

2 Sewer Use Bylaw Services Agency Portal Home

Sewer Use Bylaw Services Agency Portal Home site provides many dashboards to allow the user to have direct "quick access" to the desired functional areas to perform his or her daily job functions. See Figure 1 below

Below are the brief functional descriptions of each dashboard block:

1. **Start New Application:** allows agency users to create new applications
2. **Submitted Application:** displays the summary of submitted applications
3. **Message center:** provides short-cuts to many useful functional areas
4. **My Queries:** shows the list of available Agency queries that can be run to review industry data in iPACS

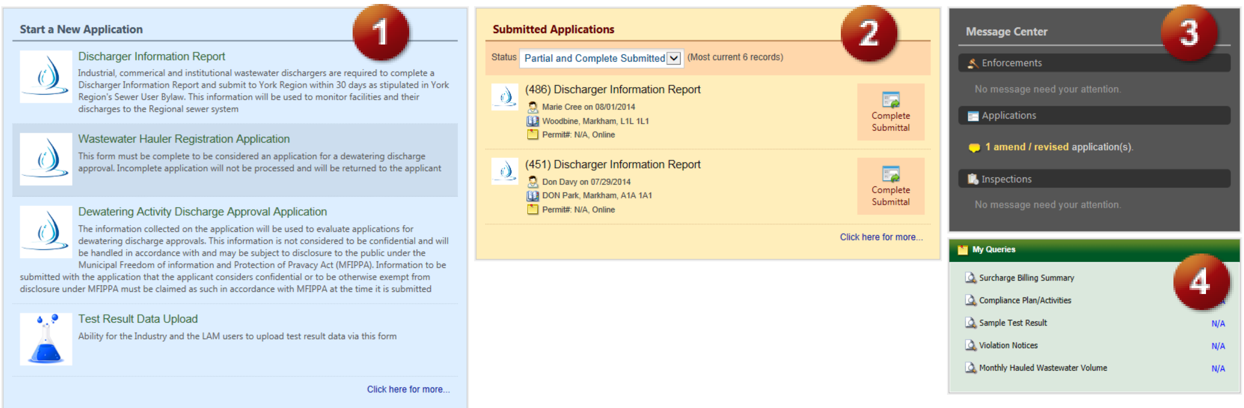


Figure 4 – Sewer Use Bylaw Services Agency Portal Home Site

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.

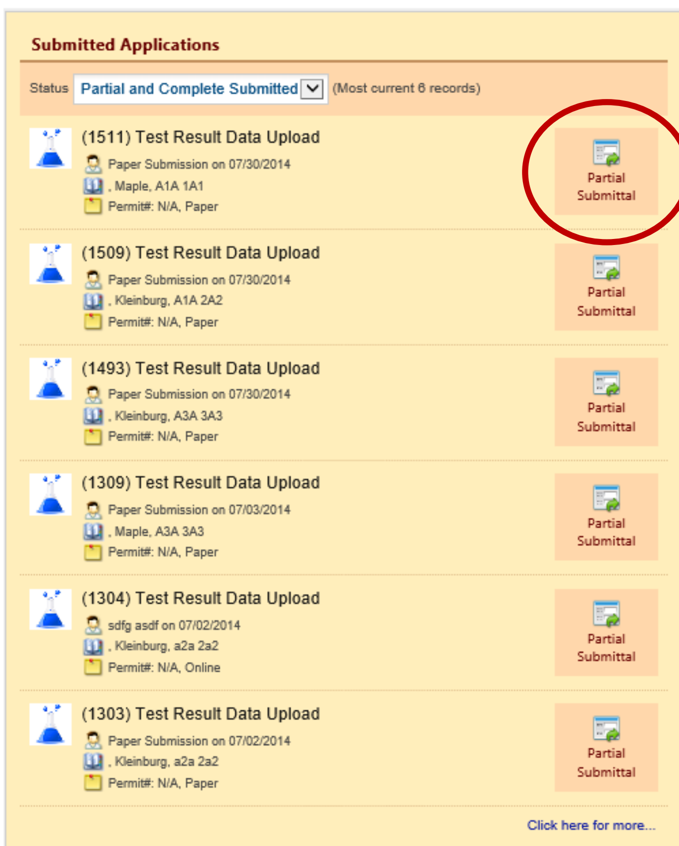


Figure 5 - Open Submitted Application

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 picture below):

- Submission Info (Tab)
- Technical Review (Tab) (Read-Only)
- Comments (+ Button on the far right)
    - Please note, these General Comment fields are only intended to provide a method for discussion with other York Agency staff with regards to an individual submission. The applicant themselves will not have access to these comments.

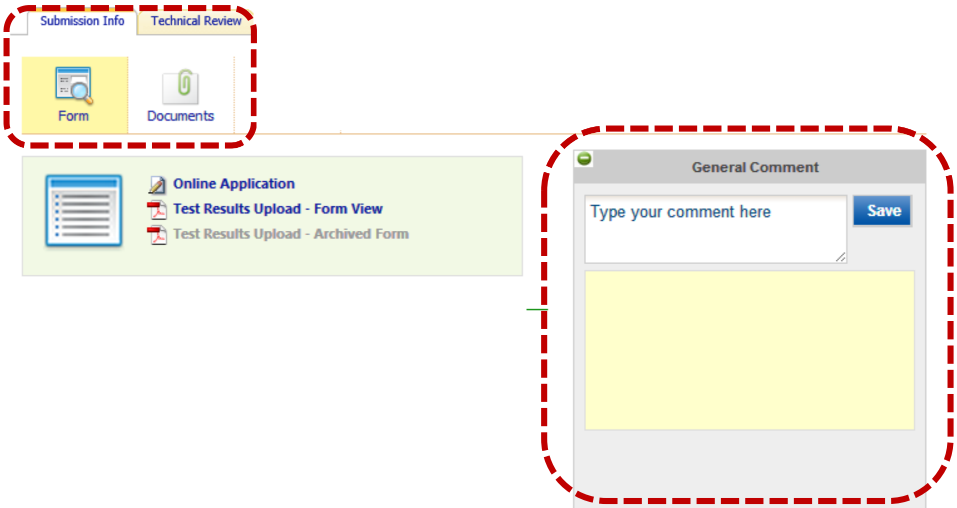
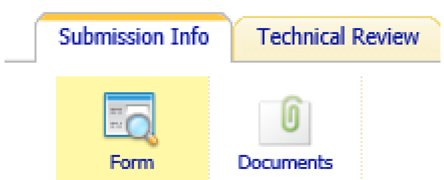


Figure 6 - Submitted Application - Overview

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 to the user submitted data. Under this tab, it consists of three sub-tabs:



- **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)

3.1.1 Form

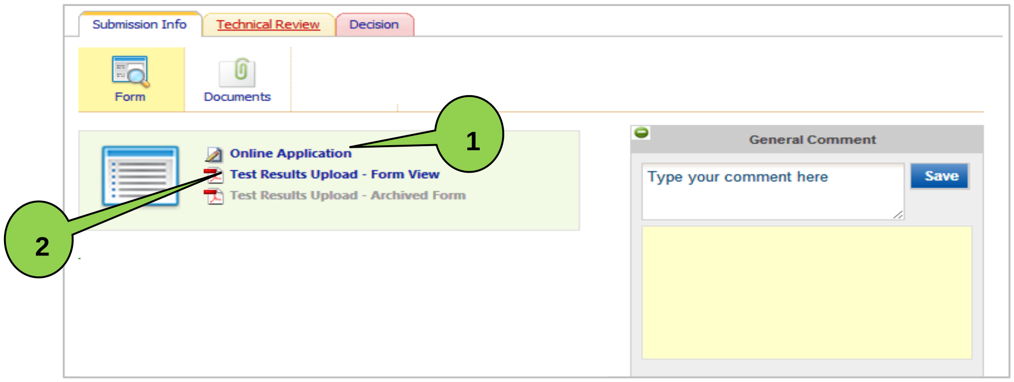


Figure 7 - Submission Application - Form Tab

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

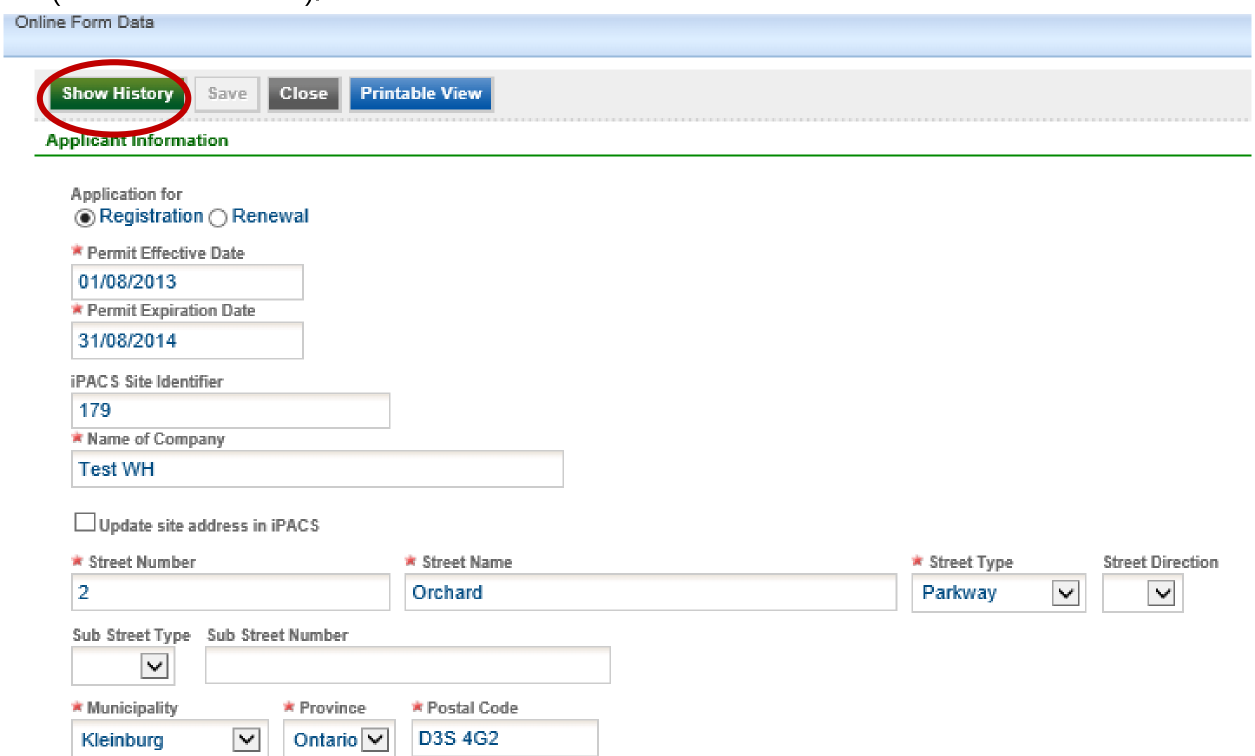


Figure 8 - Submitted Application - Application Review

- 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 ( ).

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

3.1.2 Documents

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

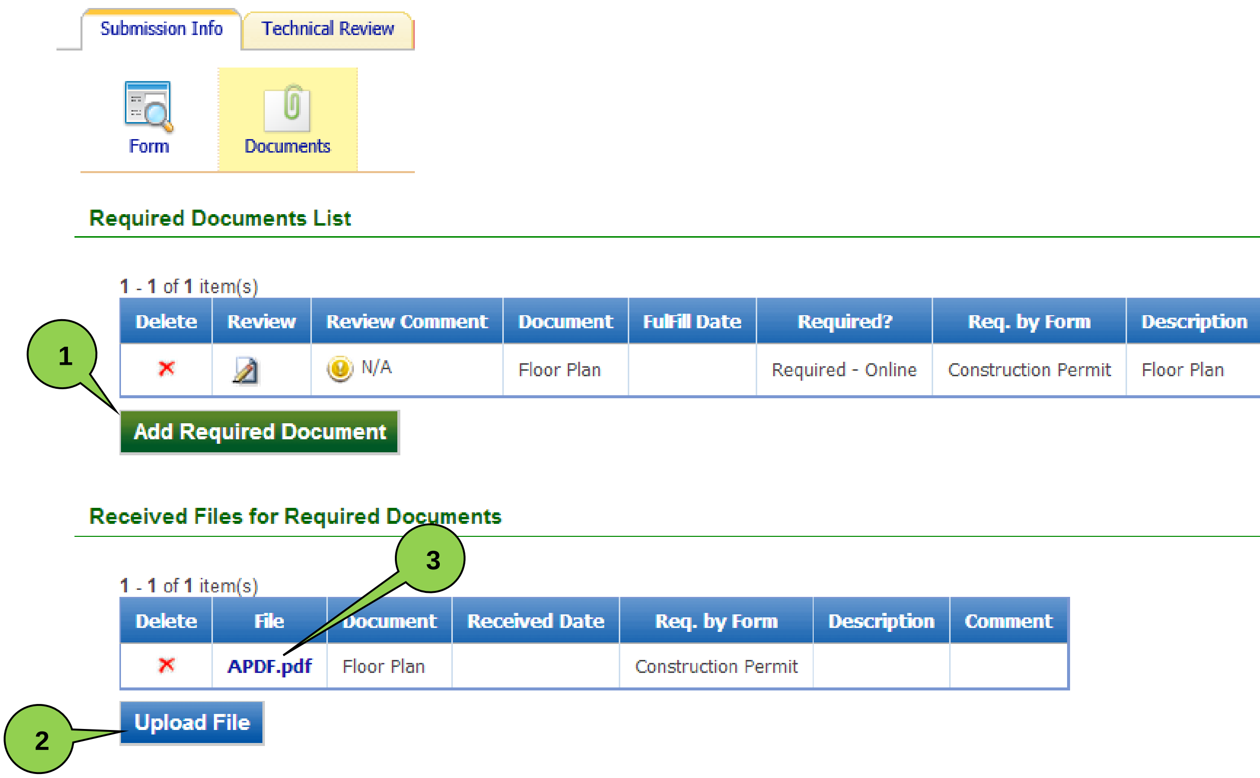


Figure 9 - Submission Application - Document Tab

If a user is attempting to upload a new required document, please follow the below process.

1. An agency user is able to add 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.

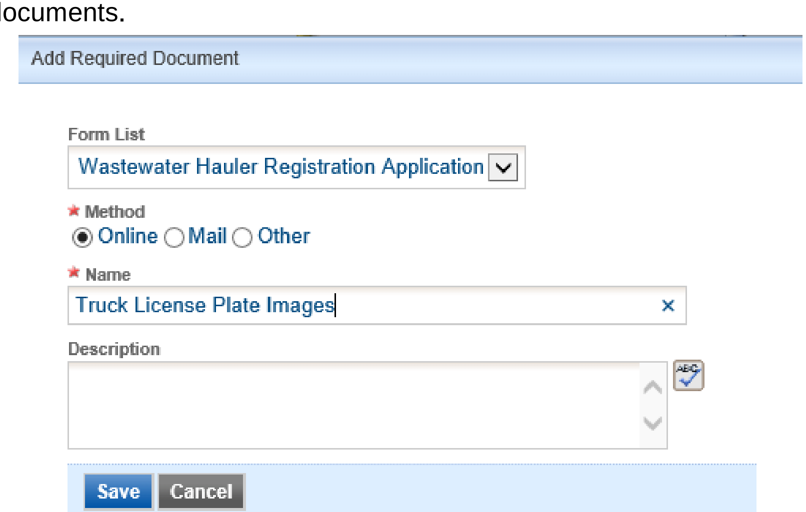


Figure 10 - Add Required Attachment to Submitted Application

2. 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).

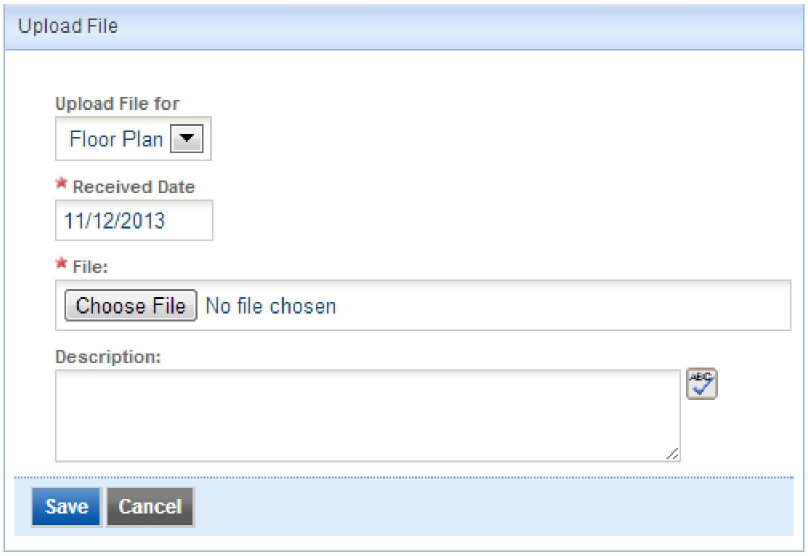


Figure 11 - Upload Attachment to Submitted Application

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

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

Figure 12 - Open attachment from Submitted Application

3.2 Technical Review Tab

This Technical Review tab will mostly be used by York Region staff to fulfill their tracking purposes. However, all Agency level staff have access to view this tab as read-only and provide additional comments (1) that could assist York Region with completing the technical review of the application.

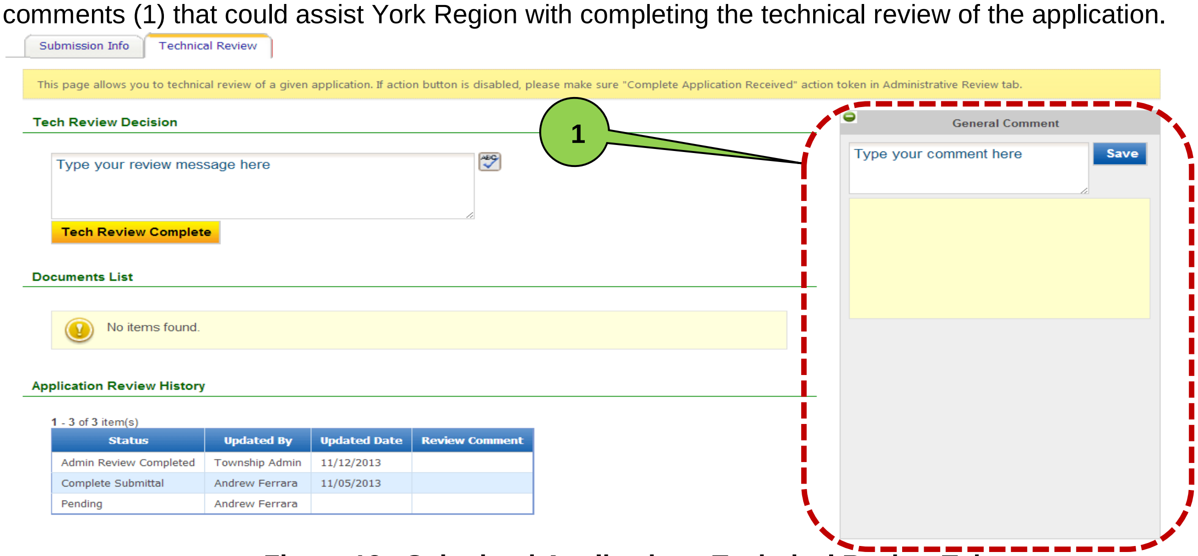


Figure 13 - Submitted Application - Technical Review Tab

a. An agency user could enter a comment at any time during the “Technical Review” process using the comment section on the right-hand side of the screen. Click the (+ Button on the far right) if the general comment box is hiding.

Note: The “Technical Comments” field is only available for use by York Region staff. And the **Tech Review Complete** button will be greyed out to represent that it is not available for use by non-York Region staff.

4 Submit 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; at home screen- Start New Application or under the Application module-Create New Application.

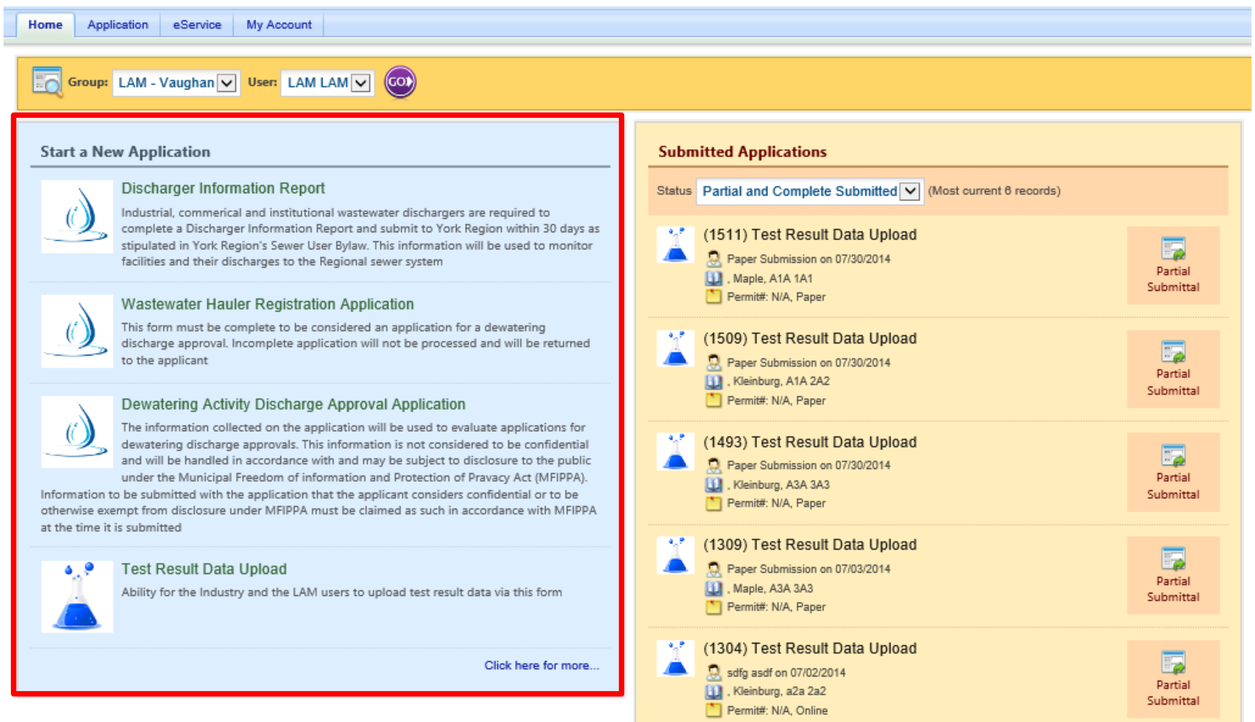


Figure 14 - Home screen - New Application

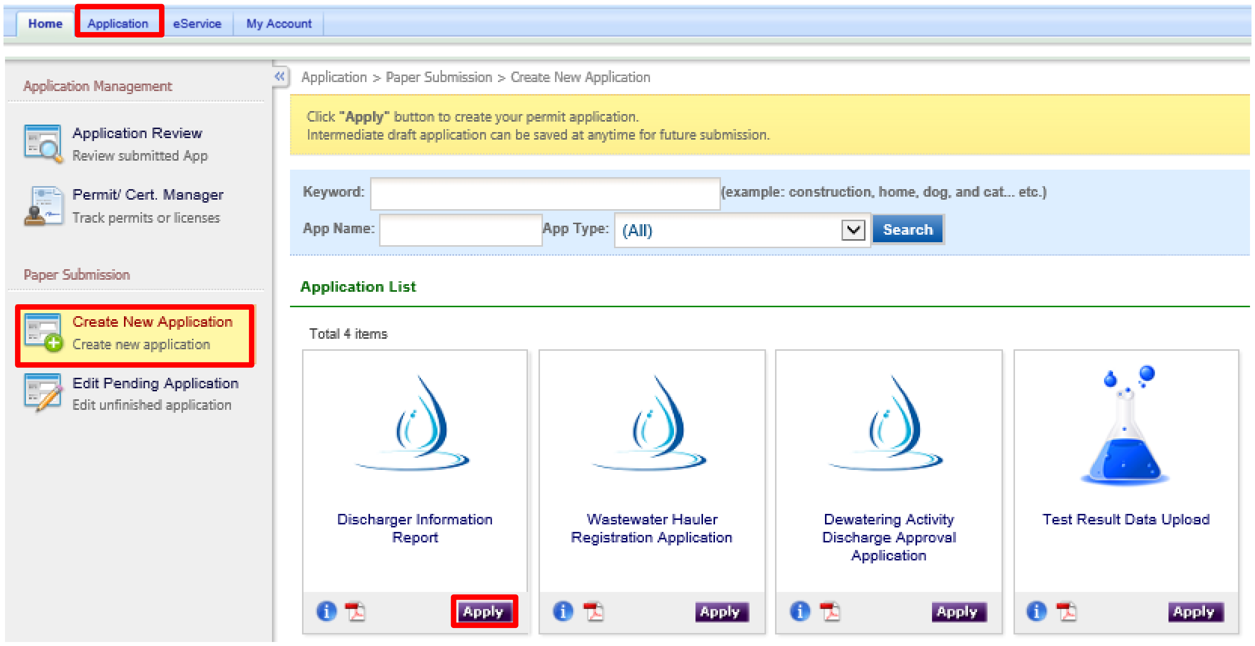


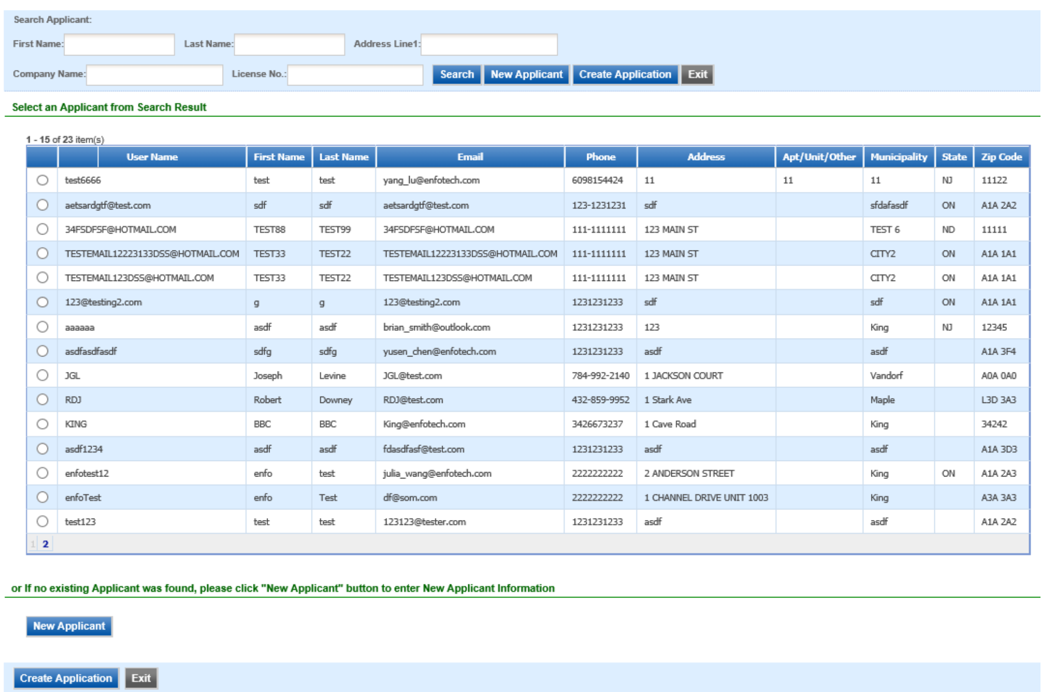
Figure 15 - Application Module - Create New Application

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

4.1 Discharge Information report (DIR)

To begin the new Discharge Information Report (DIR) from the Home screen, just click the section pertaining to the Discharge Information Report or the second screen (figure 5), 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:



	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

Figure 16 - New Discharge Information Report Application – Select Applicant

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:

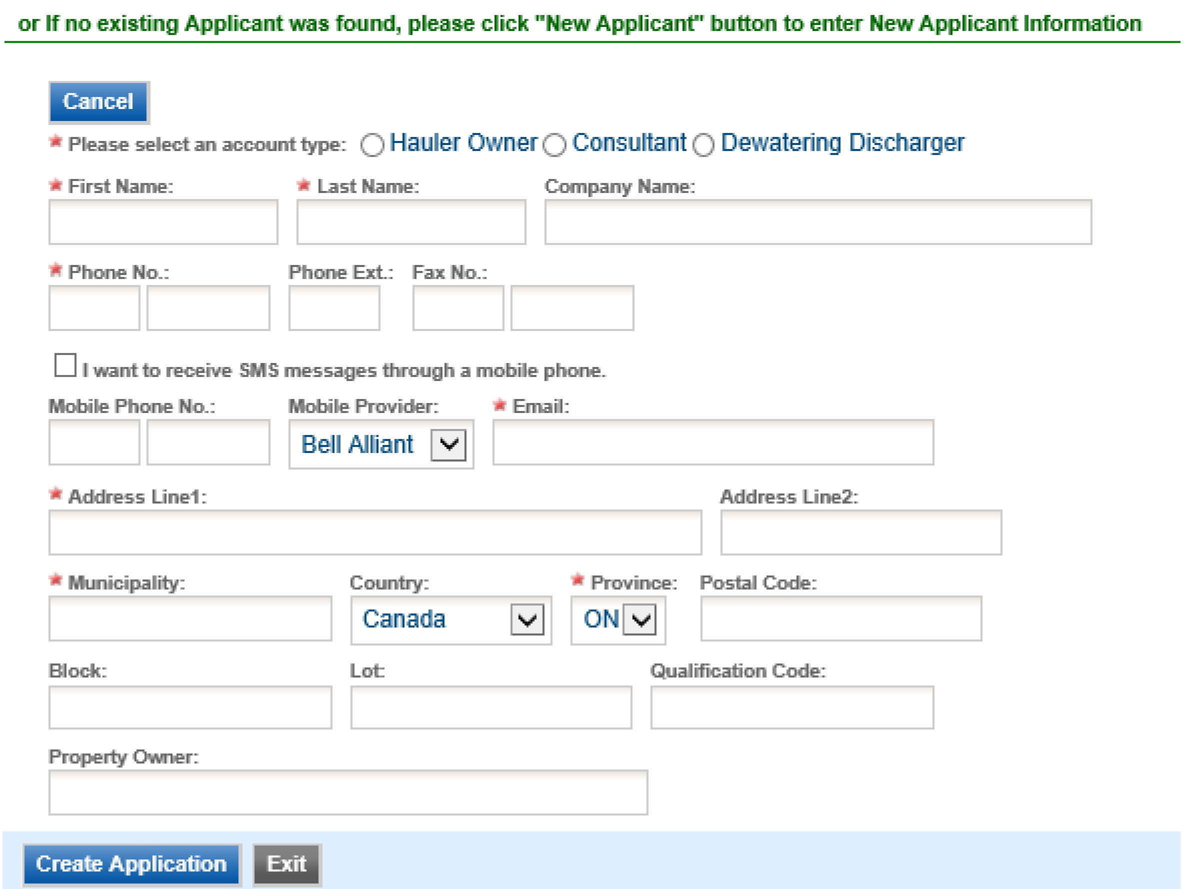


Figure 17 - New Discharge Information Report Application – Create Applicant

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.

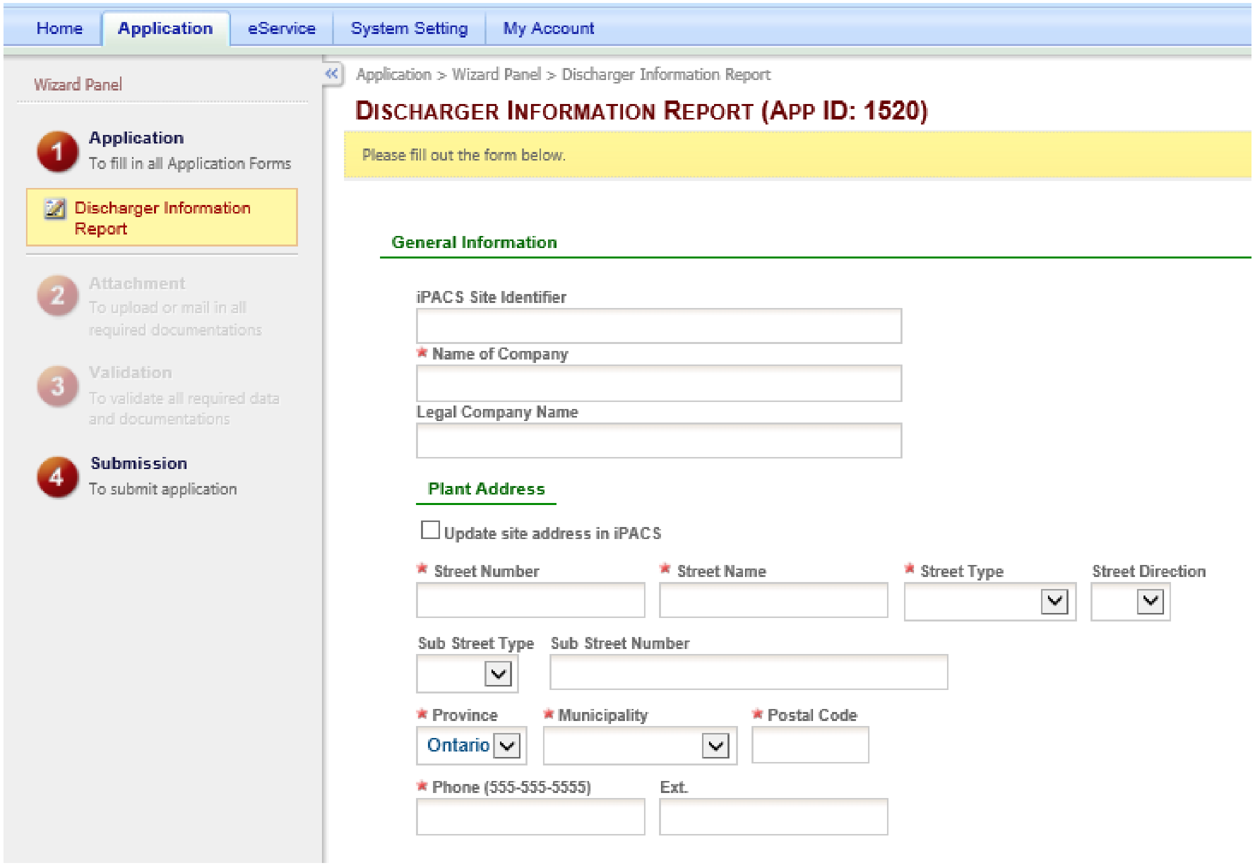


Figure 18 - New Discharge Information Report Application

The first question on the form, iPACS Site Identifier, should be left blank as it relates specifically to an unknown ID in the separate iPACS system.

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

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.

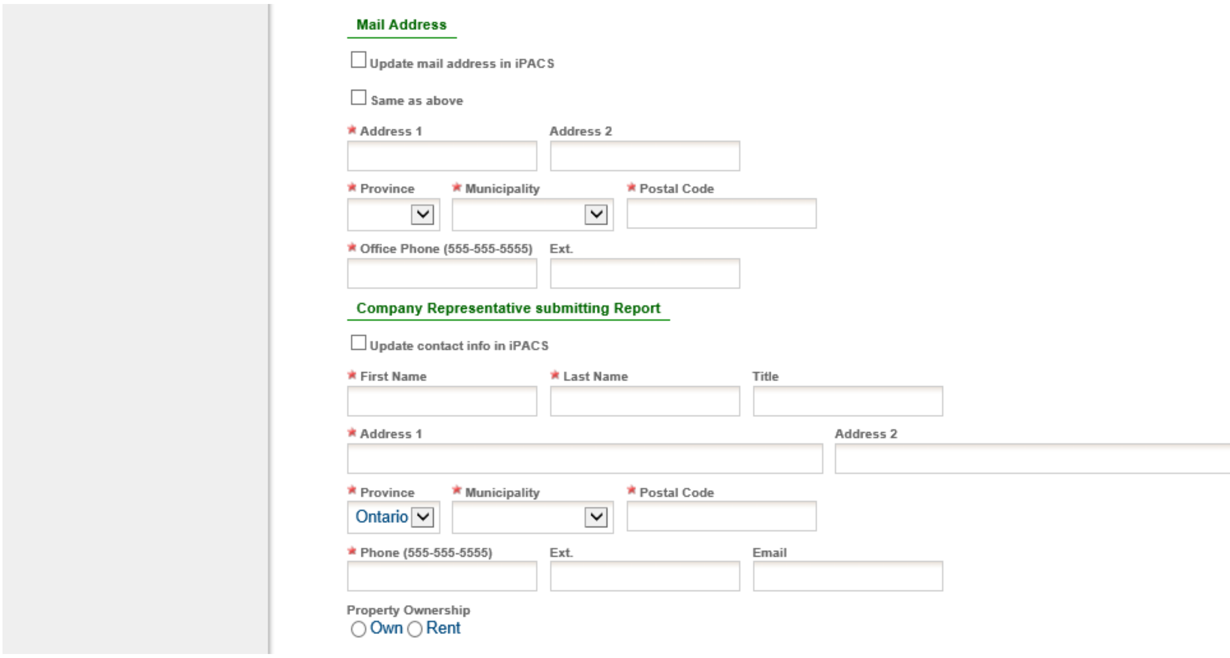


Figure 19 - New Discharge Information Report Application – Continued

Continuing down the form, under the “Mail Address” section, there is a checkbox “Same as above”. 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.

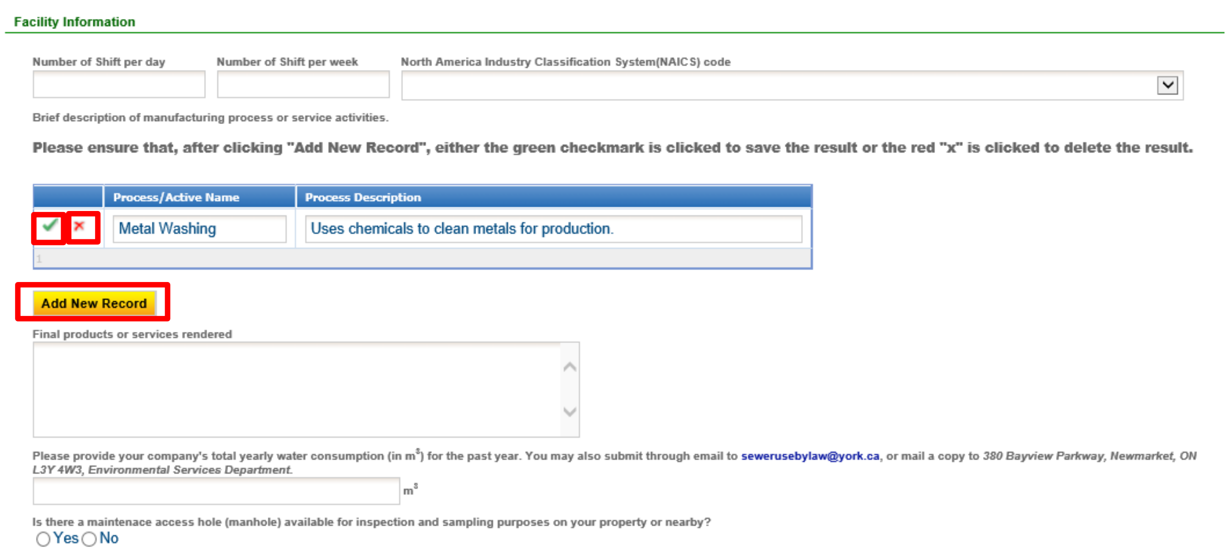


Figure 20 - New Discharge Information Report Application – Continued 2

This DIR form contains a GridView format question which allow multiple entries related to the same question. In the above example (figure 18), the form is looking for a description of the Manufacturing Processes present at the facility. It is possible and likely that on facility implements several manufacturing processes in order to produce its components.

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.

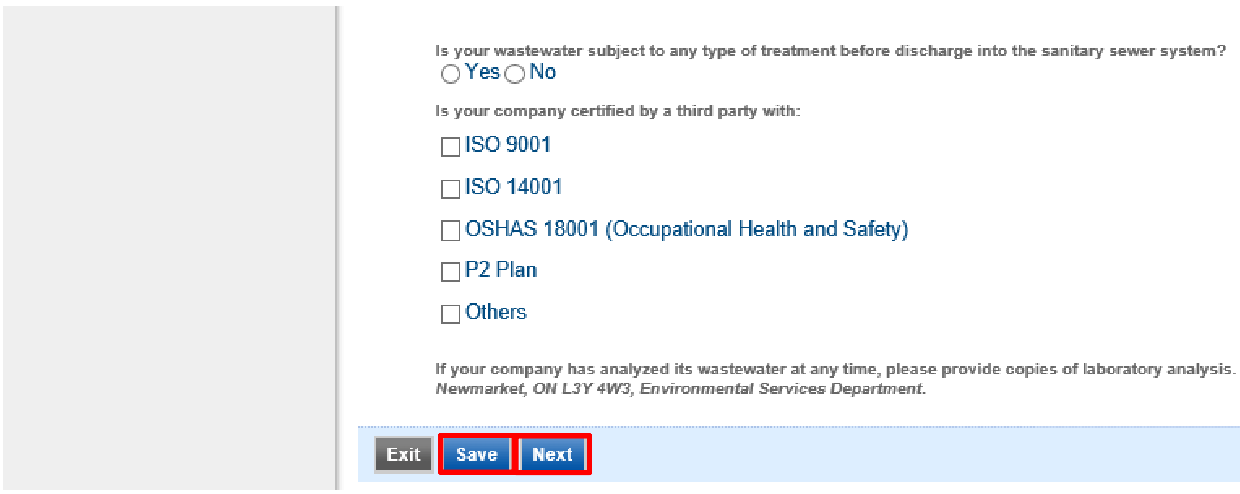


Figure 21 - New Discharge Information Report Application – Continued 3

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 of the question, 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 20):

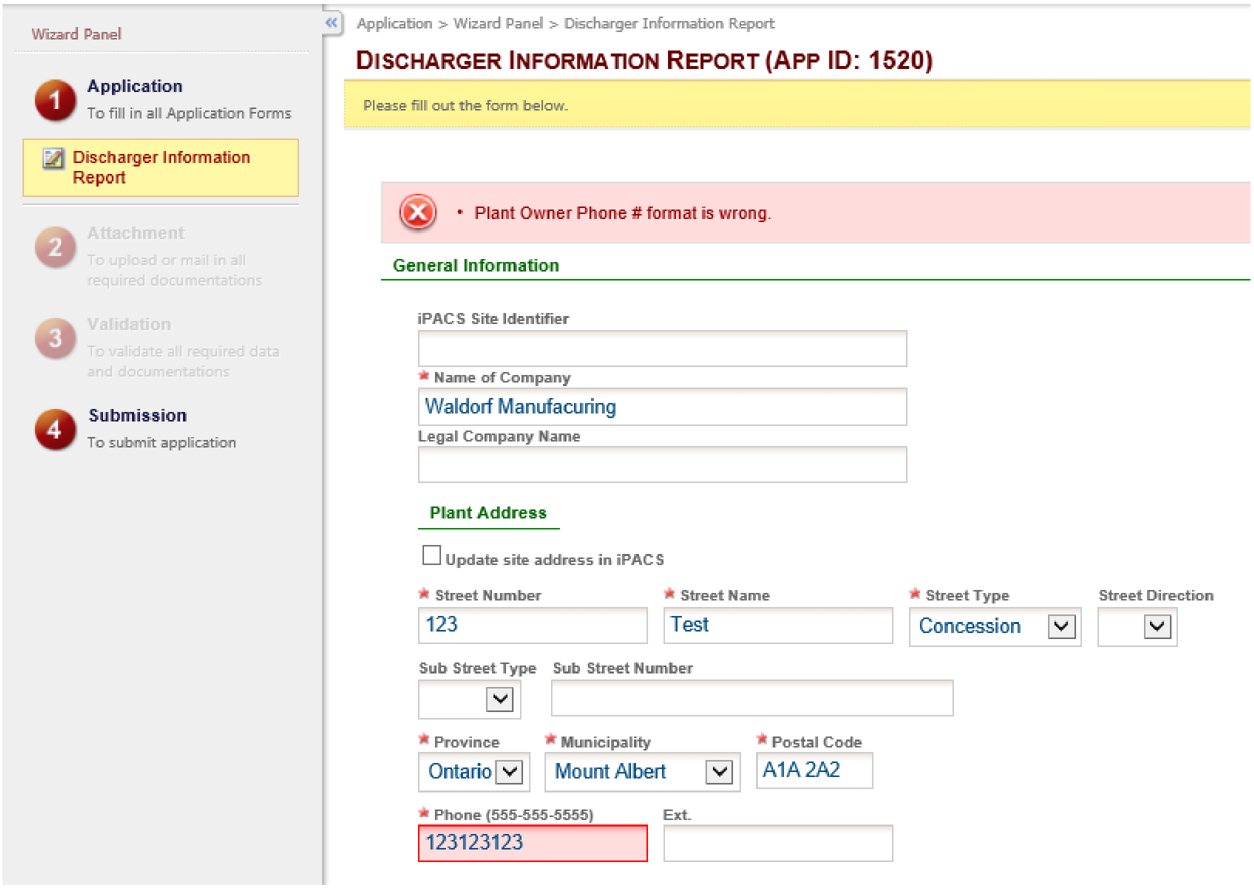


Figure 22 - New Discharge Information Report Application – Data Validation Issue

Once the issues with the data 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.

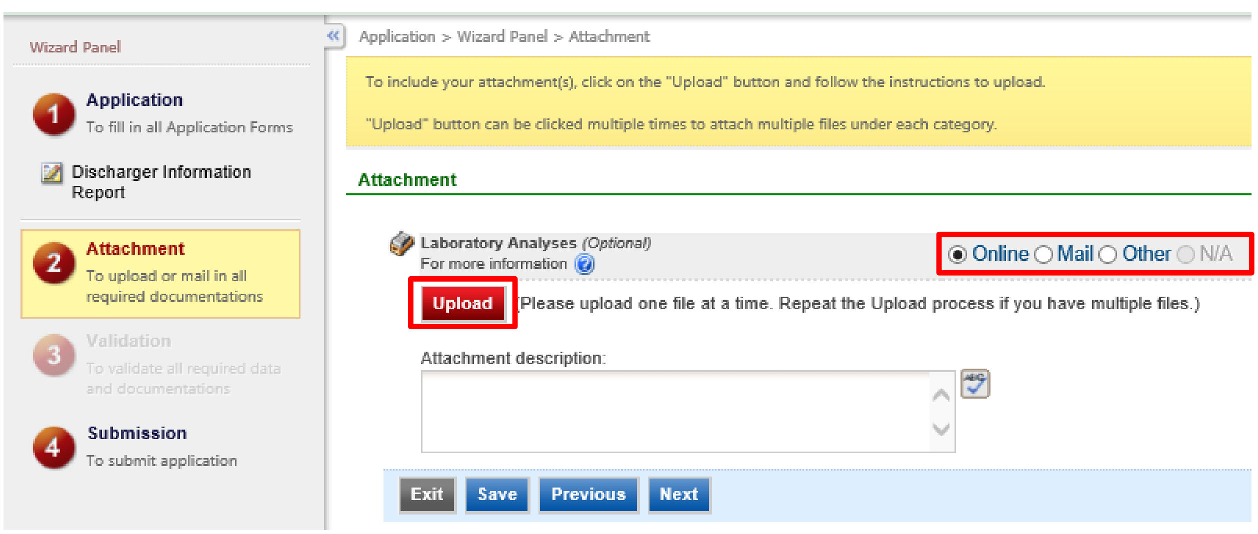


Figure 23 - New Discharge Information Report Application – Attachments

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.

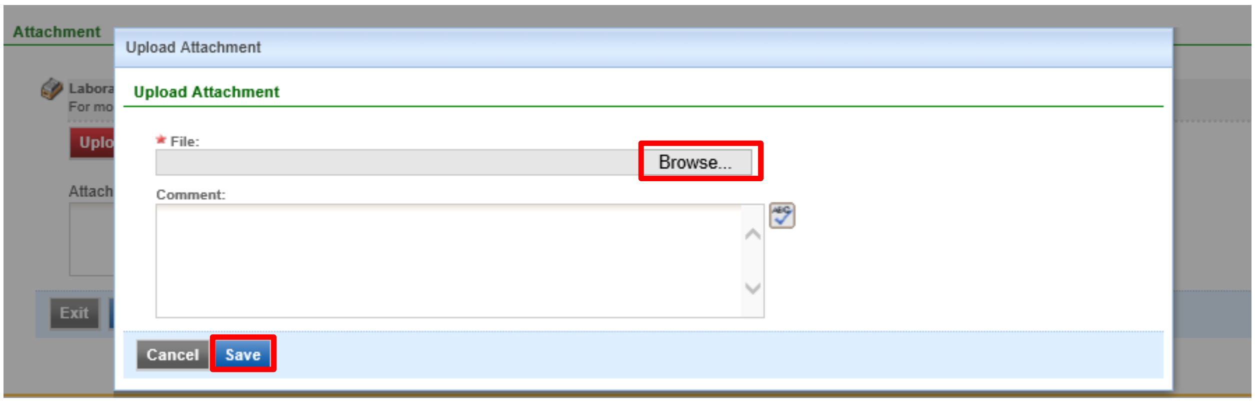


Figure 24 - New Discharge Information Report Application – Upload Attachments

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.

4.2 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:

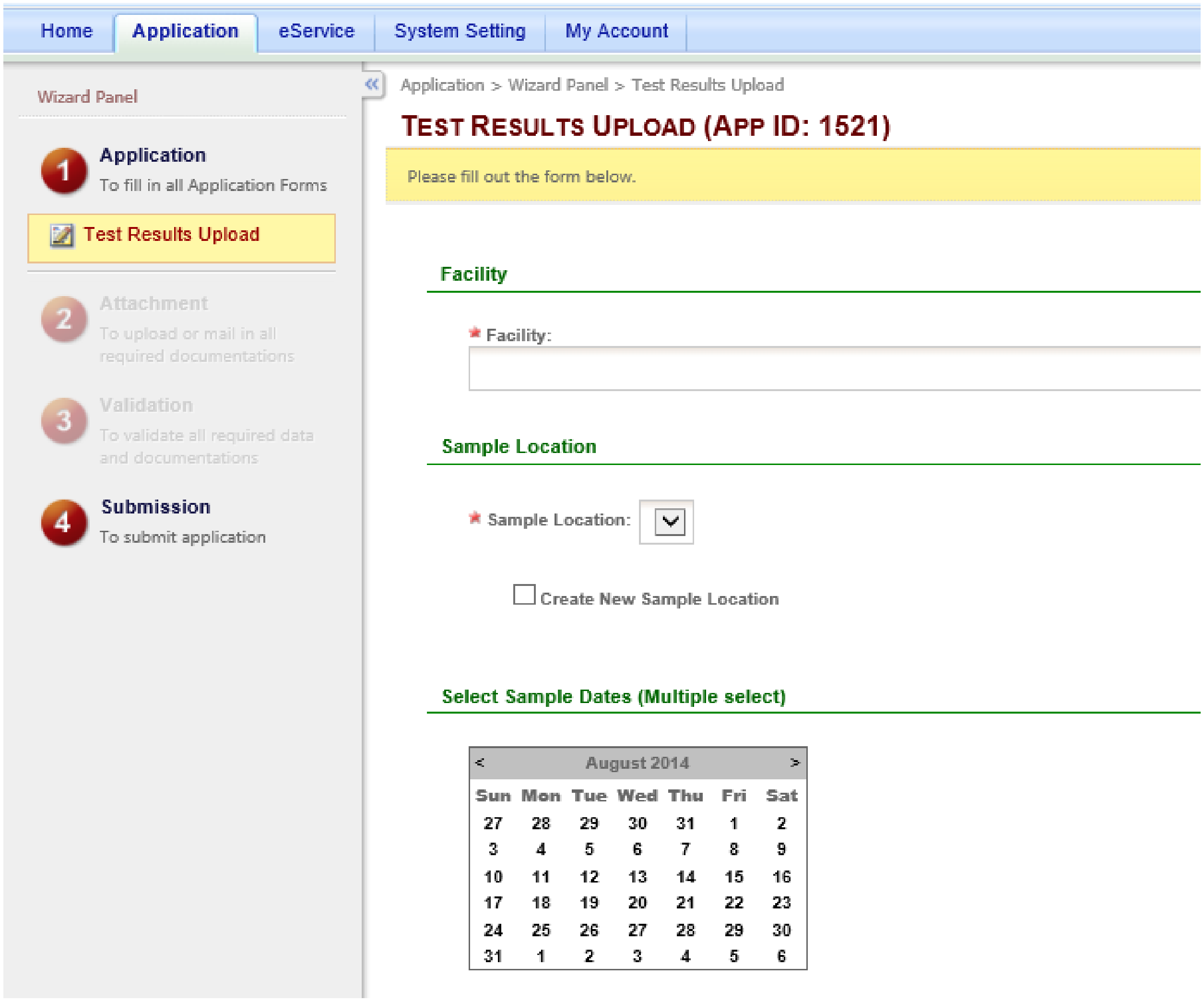


Figure 25 - New Test Results Data Upload Application

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 23). 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 can be found and selected, you will notice that the “Sample Location” dropdown may now contain a few options. If in the “Sample Location” dropdown, an option exist which matches the test results upload form received, please proceed with choosing that value and continue down the form.

If either the correct facility was not present in the “Facility” dropdown, or the correct sample location was not present in the “Sample Location” dropdown, please click the checkbox labeled “Create New Sample Location” (figure 24). 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. The screen, when refreshed, will appear as below:

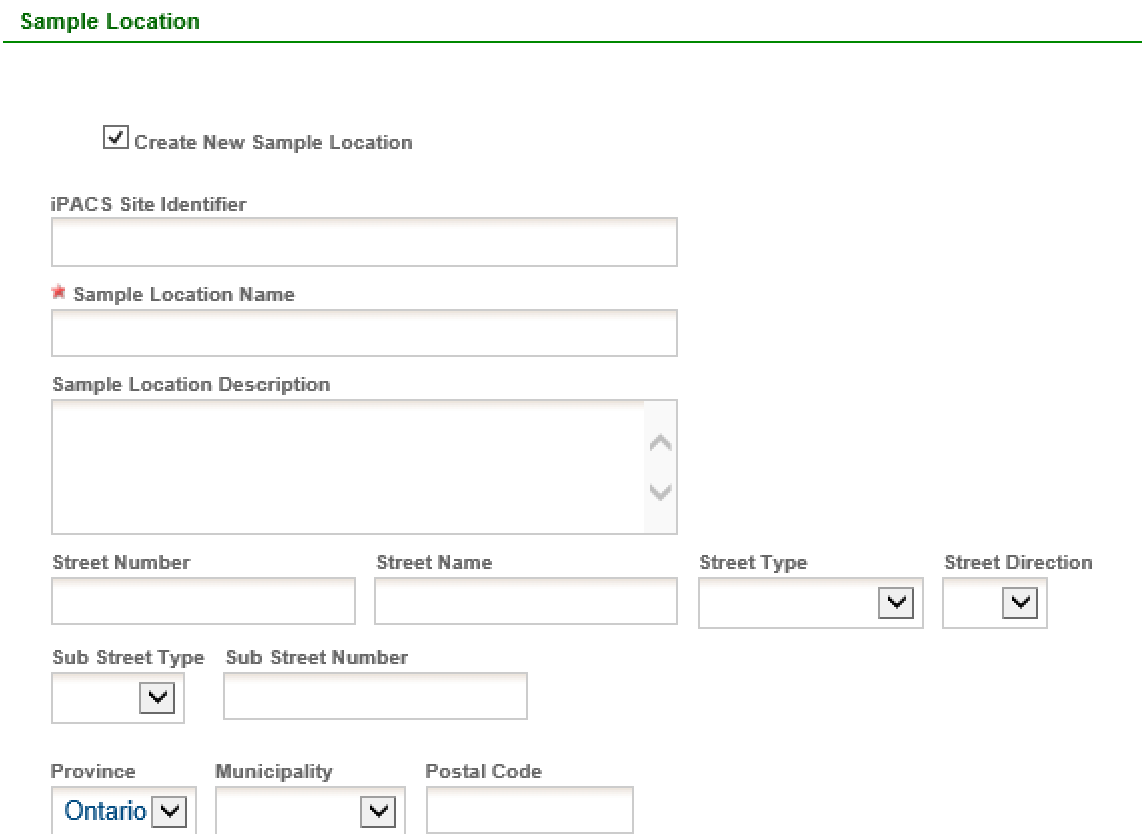


Figure 26 - New Test Results Data Upload Application - New Sample Location

The first question on the form, iPACS Site Identifier, should be left blank as it relates specifically to an unknown ID in the separate iPACS system.

All fields marked with the red asterisk (*) are require 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 which days the sample results relate to. 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.

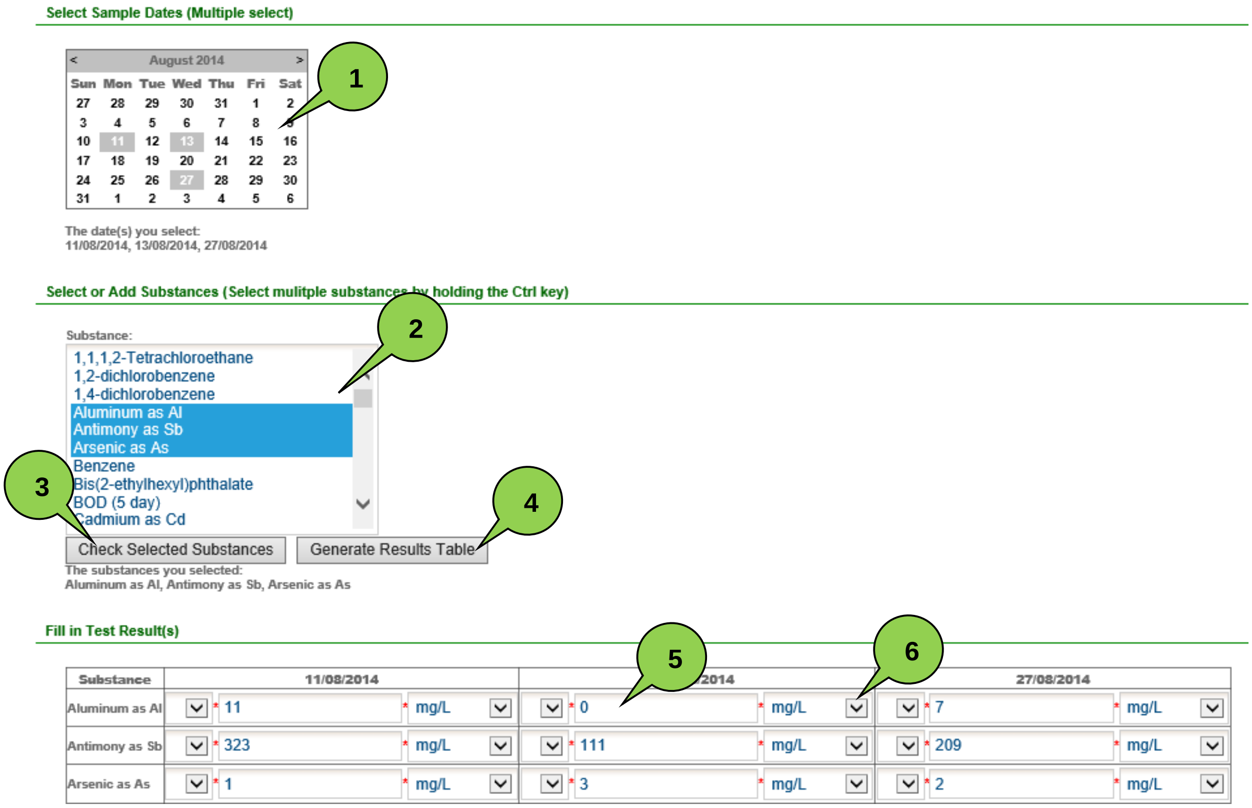


Figure 27 - New Test Results Data Upload Application – Sample Result Entry

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):

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. If a substance needed for entry is not present in this list, please contact York Region staff to discuss a solution for entering those additional results.
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 for each sample date is the Unit dropdown.

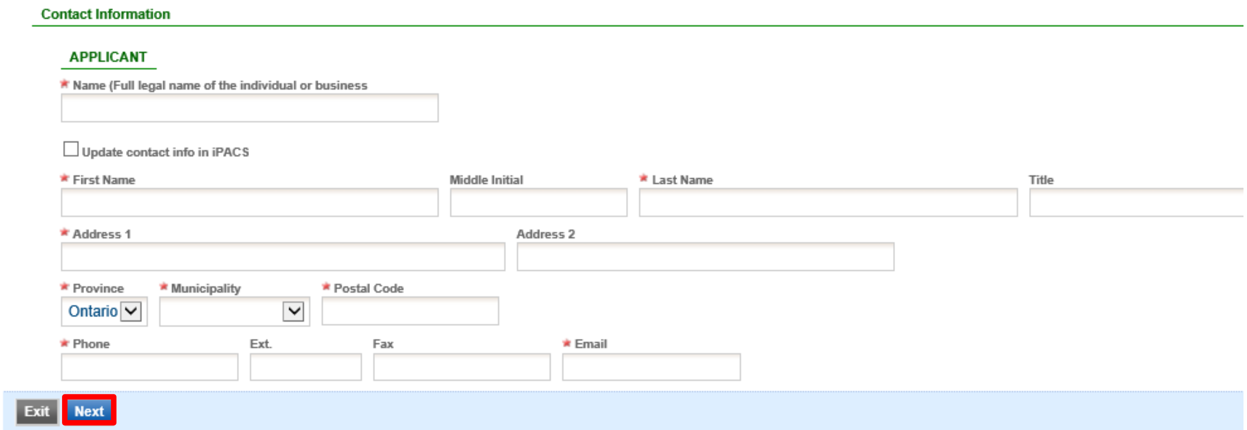


Figure 28 - New Test Results Data Upload Application – Continued

Once you have completed the data entry on the form 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 question, 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.

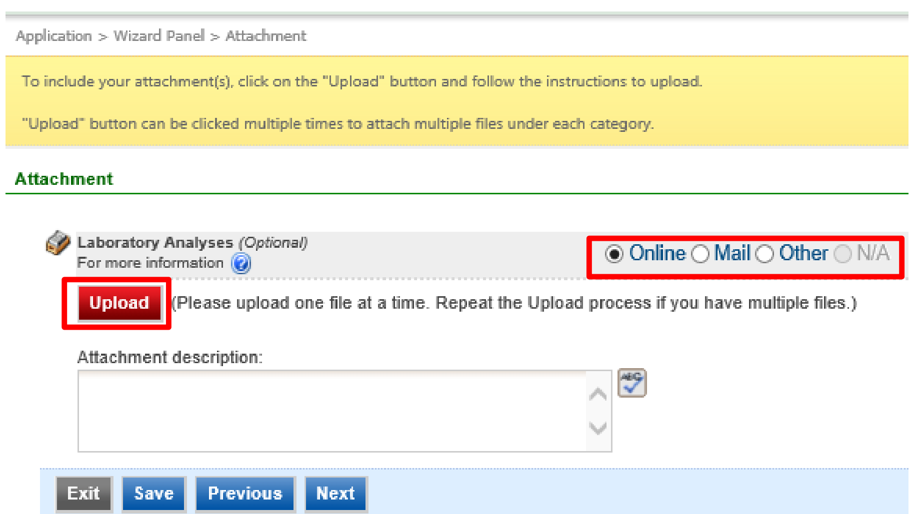


Figure 29 - New Test Results Data Upload Application – Attachments

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.

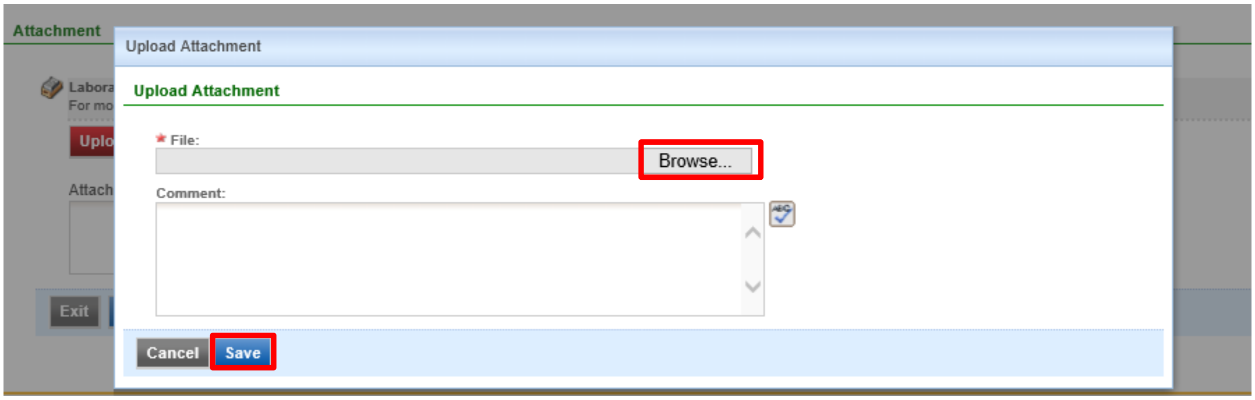


Figure 30 - New Test Results Data Upload Application – Upload Attachments

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.

5 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.

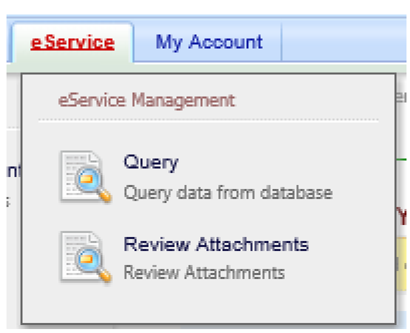


Figure 31 - eServices

5.1 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 "**LM**" folder

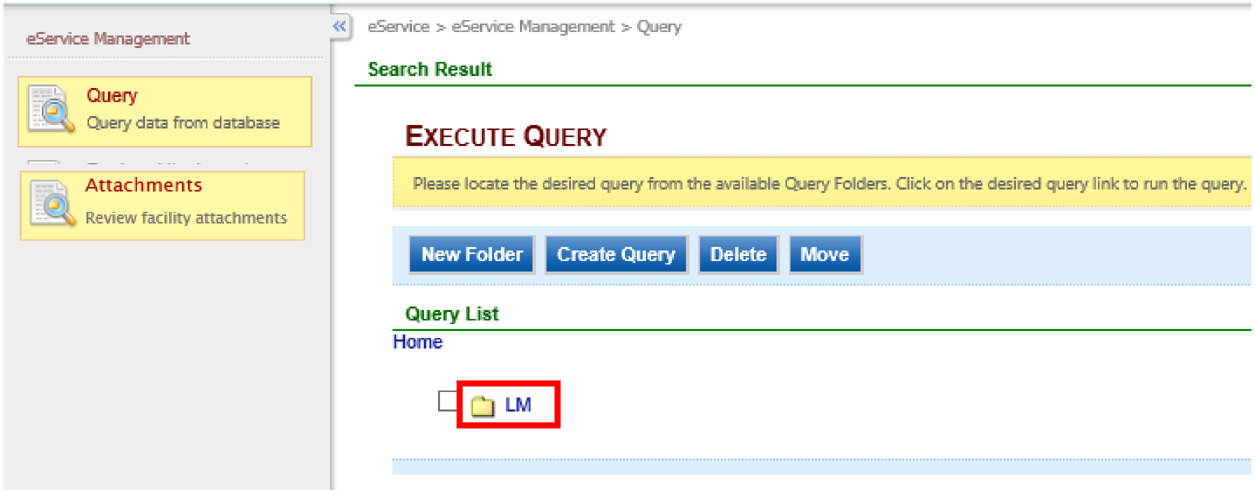


Figure 32 - Query Folders

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

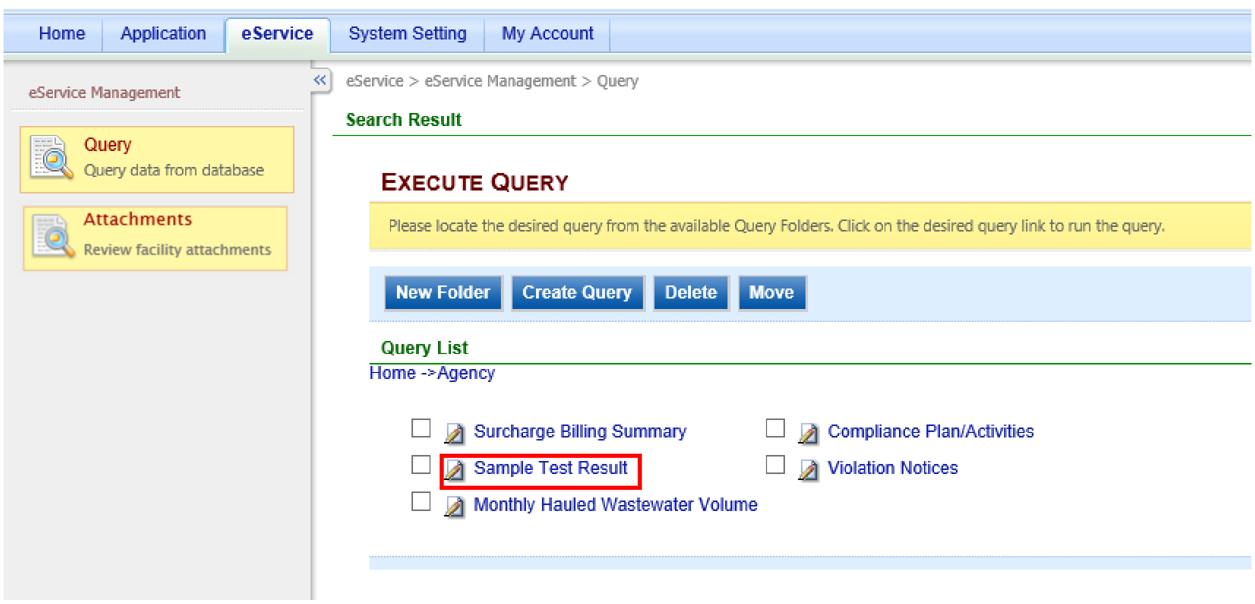


Figure 33 - Query List

3. Click "**Run Query**"

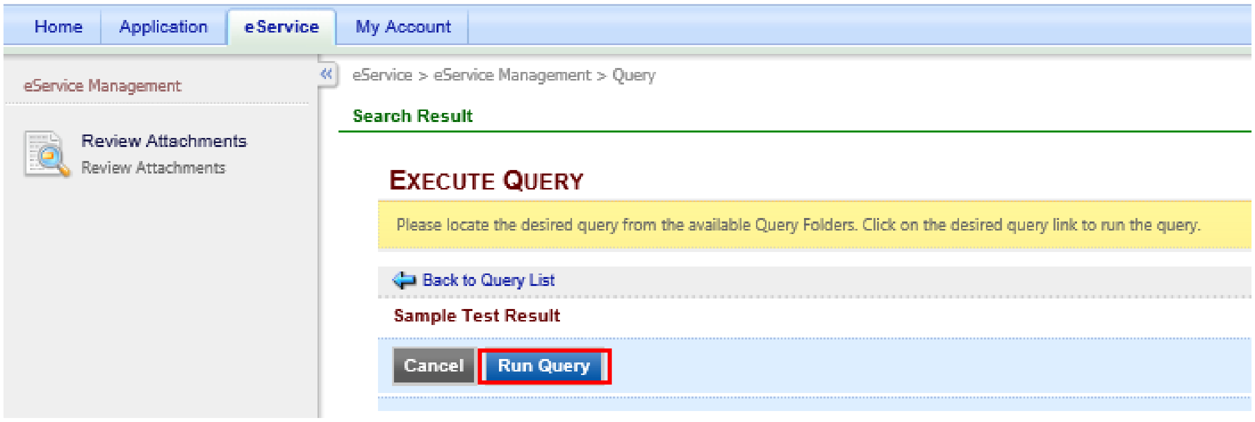
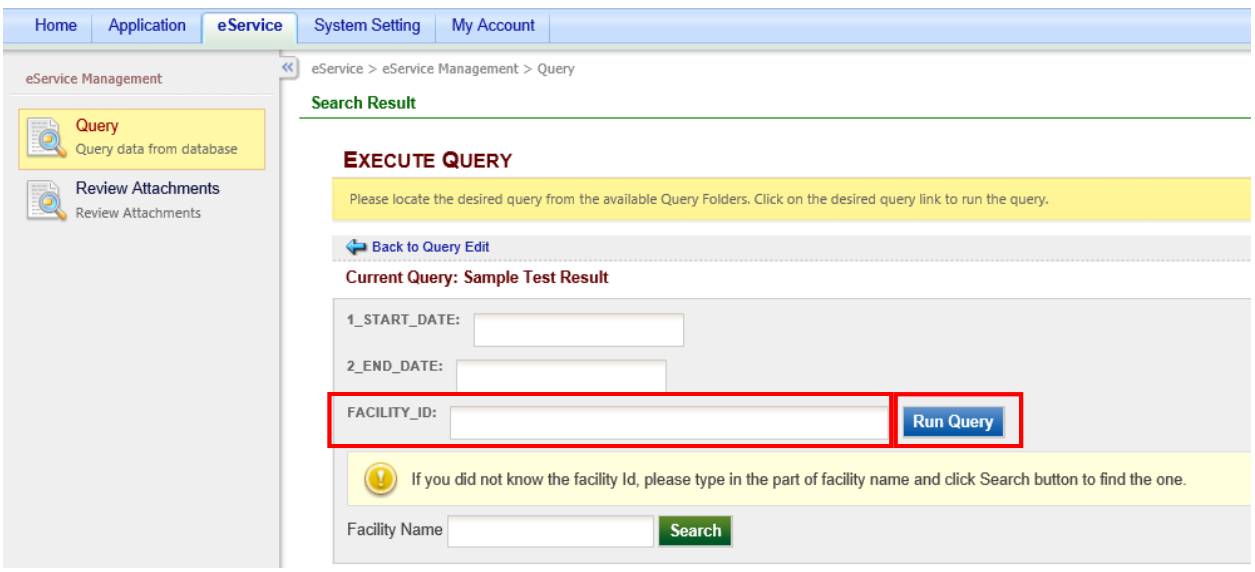


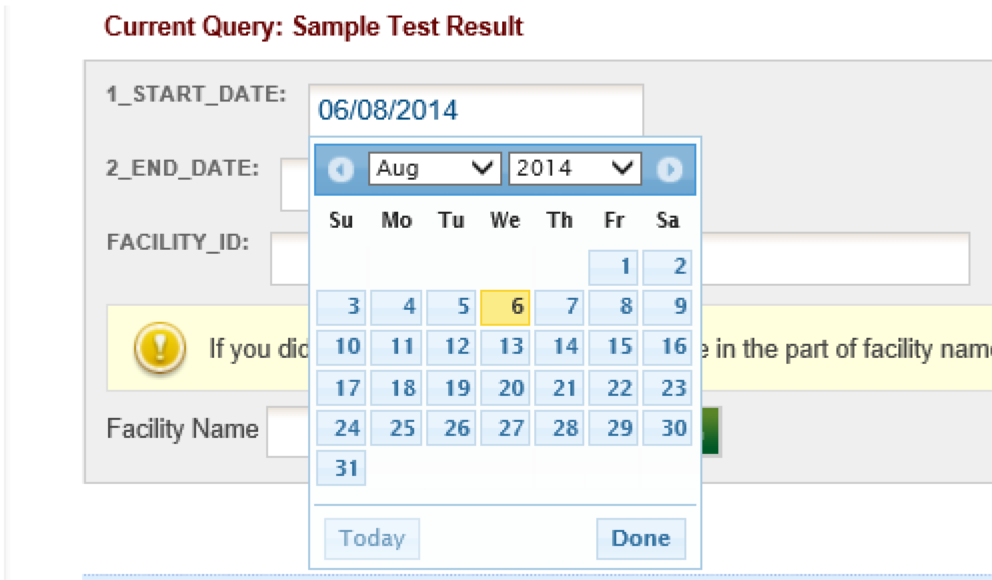
Figure 34 - Run Query

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



Execute Query >

To select a start or end date, click the text field next to either of the parameters and a date picker should be then visible. In the date picker select a date and it will be represented back on the text field.



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)

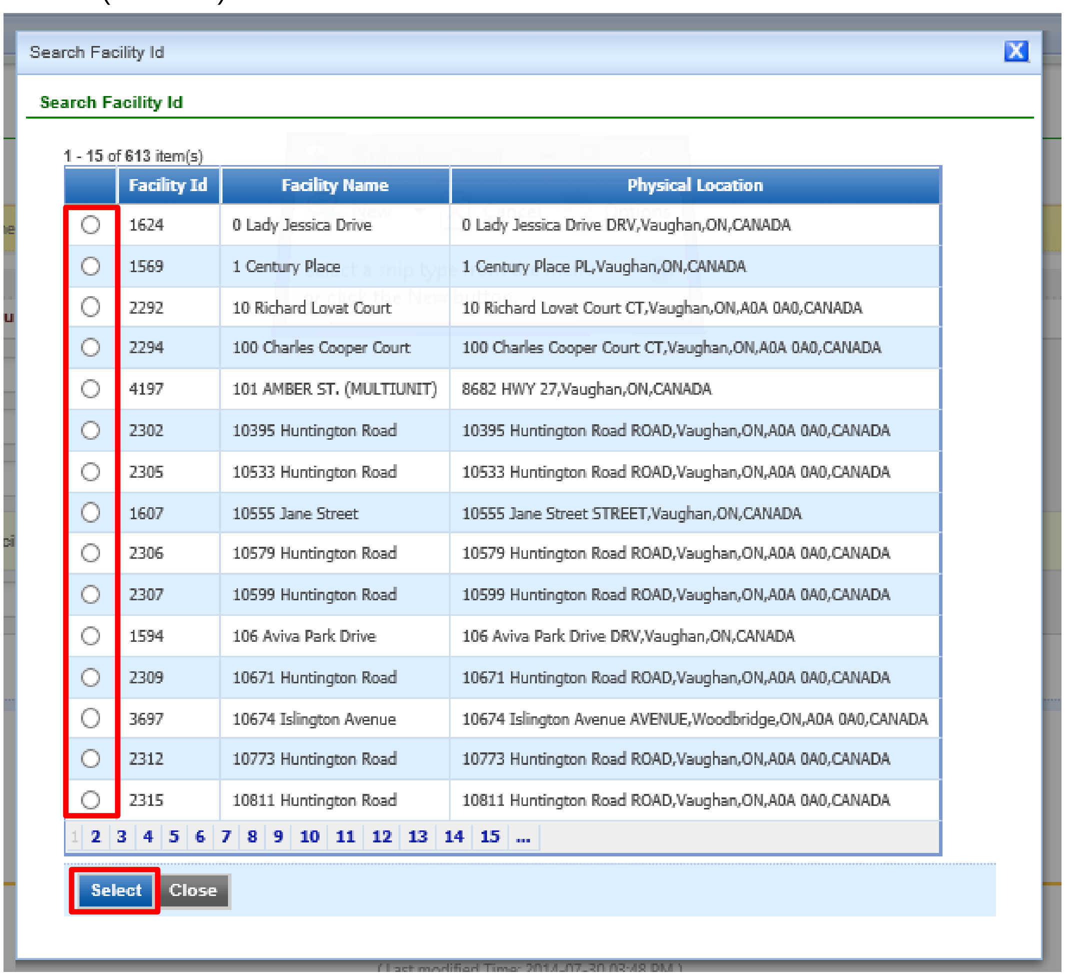


Figure 35 - Run Query - Select Facility

5. The facility ID will be placed in the FACILITY_ID box, 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.

5.2 Review Attachments

Once entering the Review Attachments module, the user will be presented with the attachment search page. At the top of this page, there is a facility drop down field which the user can use to find the correct facility they wish to review attachments for. Once the 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 related to different aspects of the facility (Monitoring, Compliance, Inspection etc.)

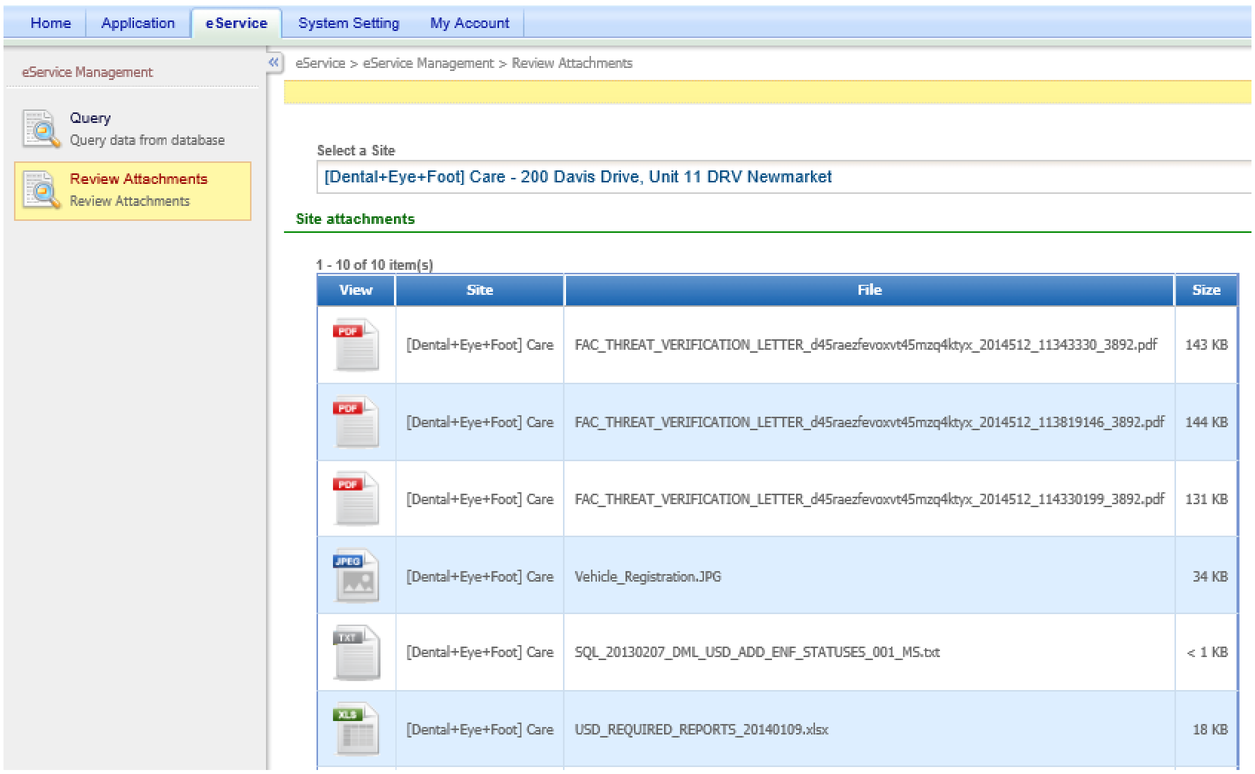


Figure 36 - Review Attachments per Facility

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.

5.3 My Account

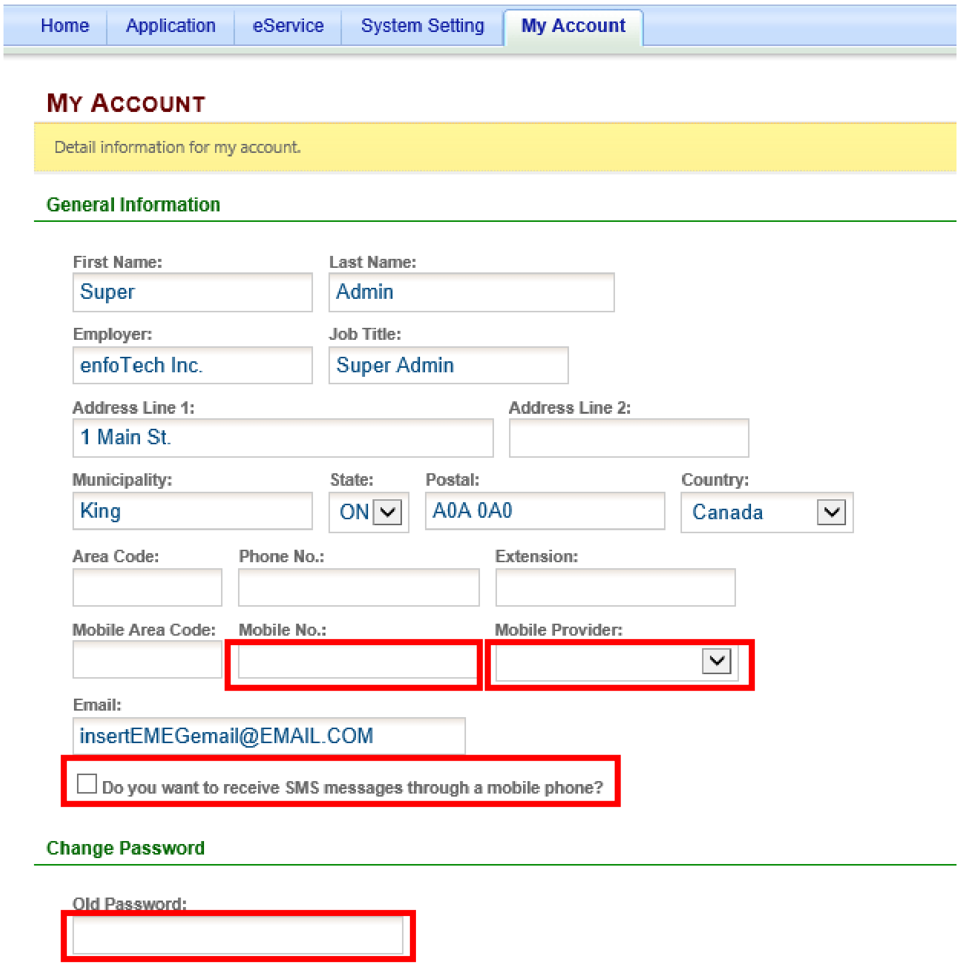


Figure 37 - My Account

- Provide Mobile No, Mobile Provider, and check the checkbox to be able to receive text message alerts.
- Provide old and new password to change old password to new password.