

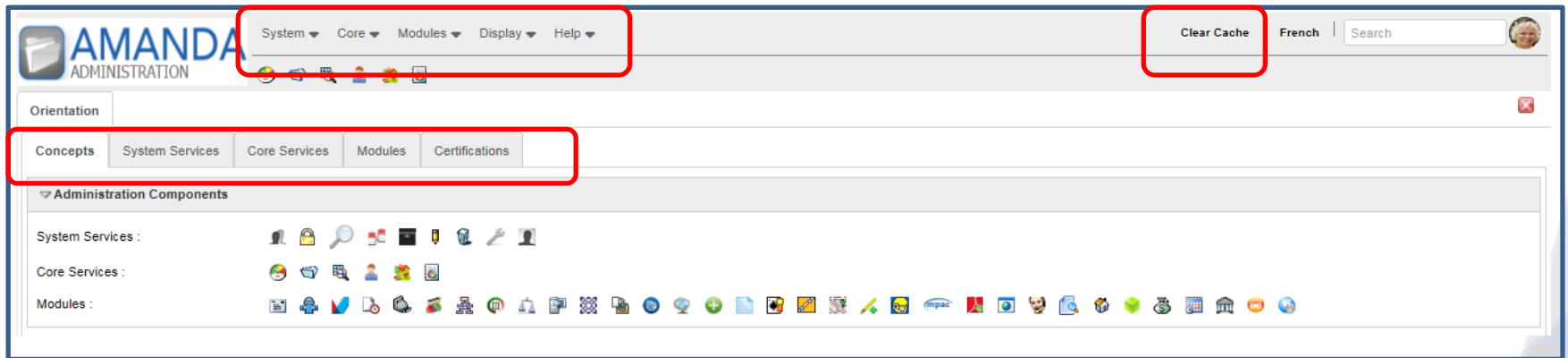
2016CTAC

AMANDA 7 New Features

New AMANDA Admin

- It's **BIG!!!**
- So many new Features
- Many amanda.properties configuration options now in Admin
- Log files now available through Admin
- Total Re-Organization!!!

New Admin Landing Page



Each Tab Makes Primary Components More Accessible

The screenshot displays a software interface with a navigation bar at the top containing five tabs: 'Concepts', 'System Services', 'Core Services', 'Modules', and 'Certifications'. The 'Modules' tab is currently selected. Below the navigation bar, the interface is organized into a grid of component cards. Each card features an icon, a title, and a brief description. The components are arranged in three columns. The first column includes: Address Adaptor (Defines the Address Adaptor), Batch Scheduler (batchScheduler*), Condition (condition*), Dispatch (dispatch*), Freedom of Information (foi*), Letter Of Credit (letterOfCredit*), Map Tab (mapTab*), MPAC Integration (mpacintegration*), and Request for Service. The second column includes: Asset Management (assetManagement*), Cashier (cashier*), Control Assessment (controlassessment_module*), EAI (eai*), GIS Adaptor (gis*), Licensing (Defines the Licensing), Markup Management (Defines the Markup Management), PDF Converter (pdfconverter*), and Review. The third column includes: Authentication Adaptor (Defines the Authentication Adaptor), Certification (certification*), Courts (This area is used to maintain all administrative tables associated with AMANDA Judgments (for Civil cases), Claims and Charges (for Citation and Criminal cases) and Bonds.), EDMS (edms*), Health (health*), LR Property (lrProperty*), Mobile (This section is used to setup the parameters for the My Office module. My Office Elements are applications (apps) that are easy ways to automate specific business functions. Users...), Public Portal (This section is used to configure the information that is displayed by the AMANDA Public Portal application as well as the kinds of e-services that will be offered by the Public Po...), and Scan Station.

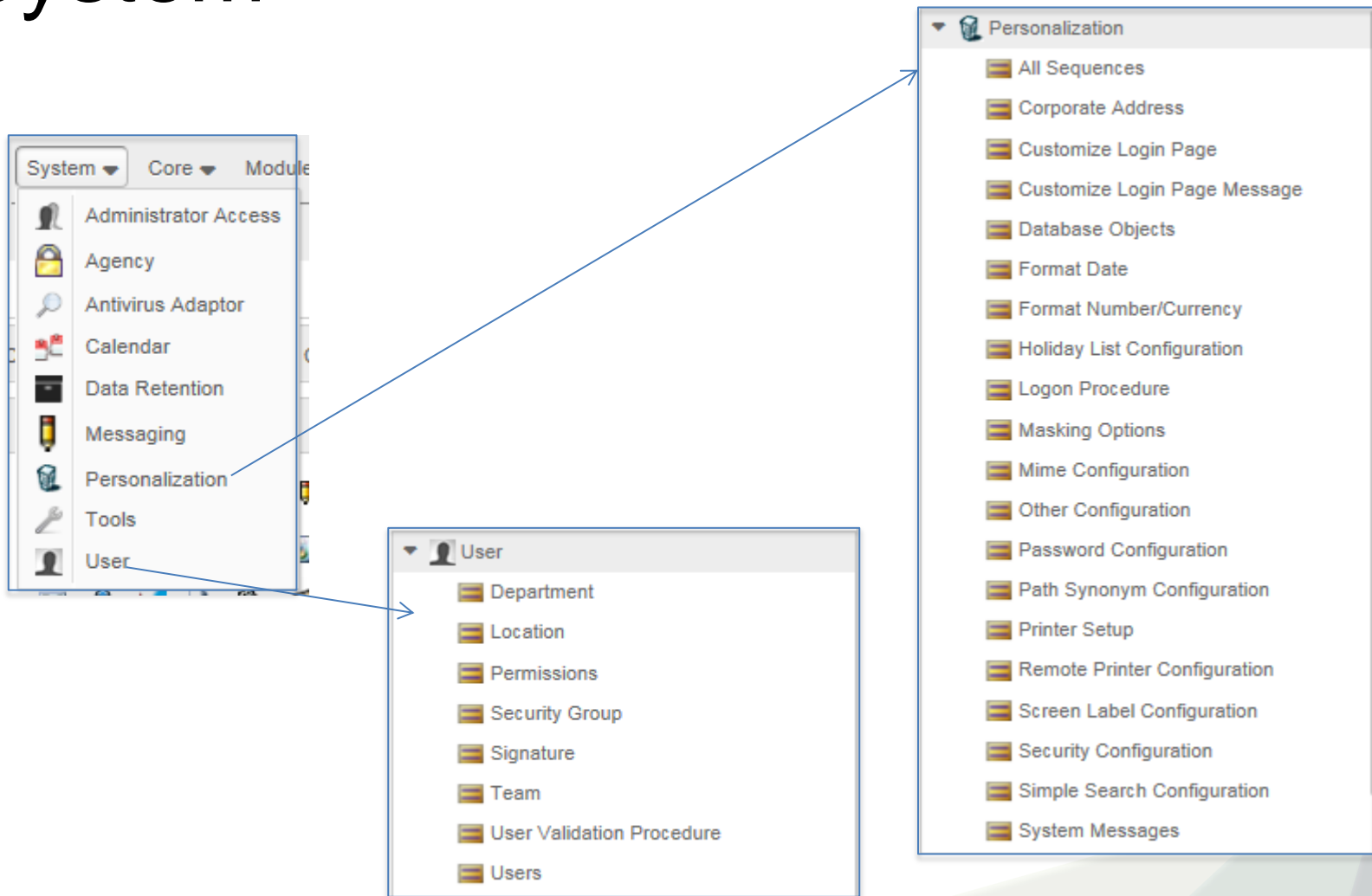
System - Core - Modules

- For the most part the components for Admin Setup will be under 3 main categories
 - **System** – global concepts such as User, Messaging, Data Retention, etc
 - **Core** – Folder, Property, People, Lookup, Reports
 - **Modules** – 30+ modules in AMANDA (eg Letter of Credit, Trust Account, Batch Scheduler)

System

- Administrator Access
- Agency
- Antivirus Adaptor
- Calendar
- Data Retention
- Messaging
- Tools
- User

System



Core

- Alert / Notification
- Folder
- Lookup
- People
- Property
- Report

Core - Folder

Orientation Folder x

0 Rows Returned

- Folder
 - Folder Type and Defaults
 - Attachment Tab
 - Comment Tab
 - Customizable Tabs
 - Document Tab
 - Fee Tab
 - Fixture Tab
 - Folder Tab
 - Info Tab
 - Process Tab
 - Milestone Tab
 - Relation Tab
 - Usage Tab

- Folder Tab
 - Clause
 - Configuration Options
 - Group
 - Setup Filter for Pick Windows
 - Setup Folder Header Label
 - Setup Folder Name
 - Setup Folder Number
 - Status
 - Sub
 - Work

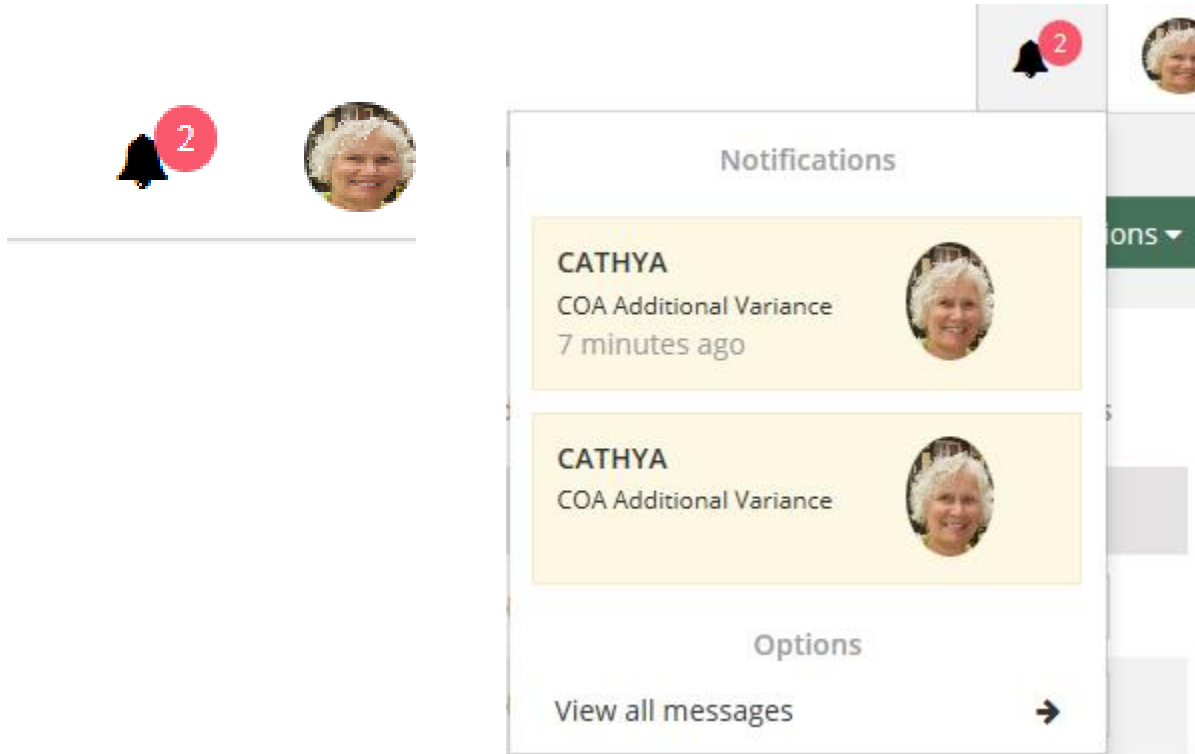
- Process Tab
 - Process and Defaults
 - Attachment Tab
 - General Tab
 - Consent Outcome Tab
 - Customizable Tab
 - Document Tab
 - Enhanced Inspections (Deficiency) Tab
 - Fee Tab

- Process Tab
 - Process and Defaults
 - Attachment Tab
 - General Tab
 - Attempt Result
 - Checklist
 - Checklist Group
 - Configuration Options
 - Discipline
 - Filter for Process Tab
 - Group
 - Info
 - Status

Modules

- Address Adaptor
- Asset Management
- Authentication Adaptor
- Batch Scheduler
- Cashier
- Certification
- Condition
- Etc, etc, etc (30+ modules)

Alert Notifications



Alert Notifications

Current Alerts

Refresh Options

- Snooze
- Dismiss

!	Alert Description	Snooze Date/Time	Alert Date/Time
1	COA Additional Variance	9/21/2016 09:12	9/21/2016 09:12

1	COA Additional Variance	9/21/2016 09:19	9/21/2016 09:19
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Zoning has determined that there is an additional variance required: Additional variance required related to building height. Maximum building height is 6.0 m File No: B001/16

2 Alerts

Cleared Alerts

!	Alert Description	Date Cleared	Alert Date/Time
1	COA Additional Variance	9/21/2016 09:08	9/21/2016 09:07
1	COA Additional Variance	8/22/2016 15:21	8/22/2016 15:20

Milestone View in Planning Folders

- The Milestone View is only available in Planning Folders. It allows users to see how processes are related to milestones and the progress of completing the milestone.

Valid Milestone – Admin Setup

0 Rows Returned

Process

- Process and Defaults
- Valid Process Group
- Valid Process Status
- Valid Process Discipline
- Valid Attempt Result
- Valid Process Checklist
- Valid Checklist Group
- Valid Process Info
- Valid Process Select
- Valid Milestone**
- Valid Consent Outcome
- Deficiency Category
- Deficiency Sub Category
- Deficiency

Valid Milestone

+ Add X Delete Save Refresh Sort Query Export Audit Help Search Search

<input type="checkbox"/>	Code	Description	Description(French)	Access Code	Comments
<input type="checkbox"/>	1	Application Approval Completed	Description(French)	Access Code	Comments
<input type="checkbox"/>	10	First Council Reading	Description(French)	Access Code	Comments
<input type="checkbox"/>	20	Second Hearing	Description(French)	Access Code	Comments
<input type="checkbox"/>	30	Final Approval	Description(French)	Access Code	Comments
<input type="checkbox"/>	40	moli milestone view	Description(French)	Access Code	Comments
<input checked="" type="checkbox"/>	25000	Application Acceptance	Description(French)	Access Code	Comments
<input checked="" type="checkbox"/>	25005	Circulation and Review	Description(French)	Access Code	Comments
<input checked="" type="checkbox"/>	25010	Hearing / Decision	Description(French)	Access Code	Comments
<input checked="" type="checkbox"/>	25015	Condition Clearance	Description(French)	Access Code	Comments

Go to Administration – Core – Process – Valid Milestone

Default Milestone Process

3 Rows Returned

Valid Milestone Default Milestone Process - 25000

+ Add X Delete Save Refresh Sort Query Export Audit Help Search Search

<input type="checkbox"/>	Type	Milestone	Process	Access Code	Comments
<input type="checkbox"/>	COA	Application Acceptance	25005 Application Intake	Access Code	Comments
<input type="checkbox"/>	COA	Application Acceptance	25010 Application Review	Access Code	Comments
<input type="checkbox"/>	COA	Application Acceptance	25015 Zoning Review	Access Code	Comments

Go to Administration – Core – Process – Valid Milestone

Select a Milestone and then click on the Default Milestone Process button

Defaulting Milestones to a Folder

The screenshot shows a software interface with a breadcrumb trail: Orientation > Folder > COA:Default Setup. Below this is a navigation bar with tabs: Status, SubType, Work, Info, Fixture, Process, Document, Attachment, Condition Mgmt, File, Condition, Distribution, Dependency, Pick Filter, Milestone (selected), Procedure, and Certifi. The main area contains two tables: 'Default Milestone' and 'Valid Milestone'. The 'Default Milestone' table has 4 rows, and the 'Valid Milestone' table has 9 rows. The 'Valid Milestone' table has a checkbox selected for the row with code '25015'.

Default Milestone					
<input type="checkbox"/>	Code	Description	Start After Days	Cal. Type	End Days
<input type="checkbox"/>	25000	Application Acceptance	0	Working	End Days Type
<input type="checkbox"/>	25005	Circulation and Review	Start After Days	Working	End Days Type
<input type="checkbox"/>	25010	Hearing / Decision	Start After Days	Working	End Days Type
<input type="checkbox"/>	25015	Condition Clearance	Start After Days	Working	End Days Type

Valid Milestone			
<input type="checkbox"/>	Code	Description	Description(French)
<input type="checkbox"/>	1	Application Approval Completed	Description(French)
<input type="checkbox"/>	10	First Council Reading	Description(French)
<input type="checkbox"/>	20	Second Hearing	Description(French)
<input type="checkbox"/>	30	Final Approval	Description(French)
<input type="checkbox"/>	40	moli milestone view	Description(French)
<input type="checkbox"/>	25000	Application Acceptance	Description(French)
<input type="checkbox"/>	25005	Circulation and Review	Description(French)
<input type="checkbox"/>	25010	Hearing / Decision	Description(French)
<input checked="" type="checkbox"/>	25015	Condition Clearance	Description(French)

Administration – Core – Folder – Select a folder type – Folder and Defaults – Milestone tab

How do Milestones Affect a Folder?

The screenshot shows a software interface for a user named AMANDA 7. The main content area displays a folder titled "1520 Pine ST [COA]". Below the folder name, there is a breadcrumb trail: "Folder | Property(1) | People(1) | Info(12) | Attachment(2) | Fee(1) | Process(13) | Document(1) | Comment | Condition(1) | Milestone(4)". The folder name is followed by several status tags: "Circulated", "Warning", and "Application Acceptance". The "Application Acceptance" tag is highlighted with a red rectangle. To the right of the folder name are "Edit" and "Options" buttons. The interface is divided into several sections: "General", "Primary Property", and "Tracking Dates & Reference Information".

General	
Type	Committee of Adjustment (COA)
Sub Type	Minor Variance(25005)
Work Type	Residential, Agricultural, Institutional(25035)
Group	COA
Parent ID	
Project ID	1429

Primary Property		
Address	1520 Pine ST , Bou...	
Property ID	11530	
Folder Unit	Roll #	Location

Tracking Dates & Reference Information			
Name	Reference No.	Reference No.2	Opened On
1520 Pine ST	A124/16		8/16/2016
Issue/Approve On	Issued By	Expires On	Closed On
Priority	Project Lead		
0	Cathy Abbott		

When a milestone is complete the milestone name is shown in the main folder screen.

Milestone Tab on Folder

AMANDA 7

Planning Folder 1520 Pine ST [COA] 1520 Pine ST [COA] x

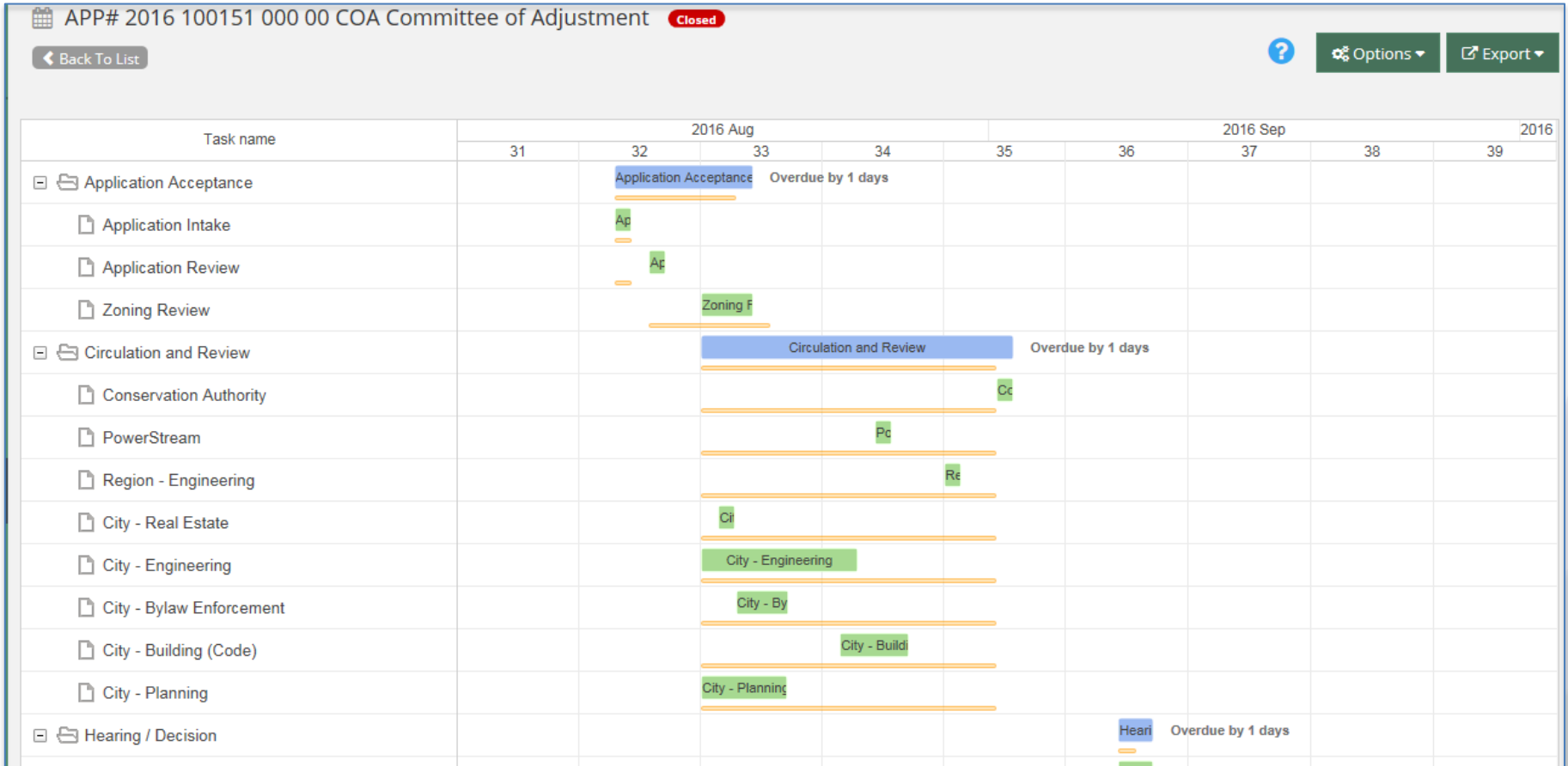
Folder | Property(1) | People(1) | Info(12) | Attachment(2) | Fee(1) | Process(13) | Document(1) | Comment | Condition(1) | Milestone(4)

APP# 2016 100155 000 00 COA Committee of Adjustment **Circulated** Edit Options

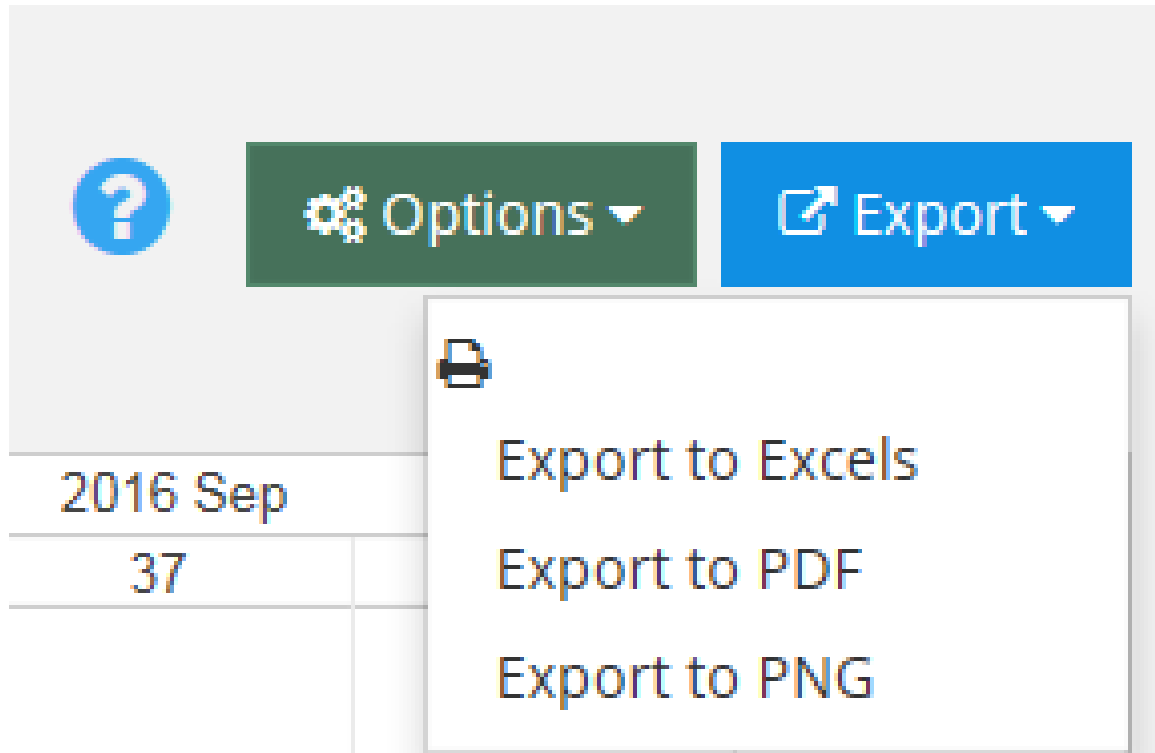
Milestone*	Schedule Start Date	Schedule End Date	Start Date	End Date	Display Order	
Application Acceptance			8/15/2016	8/17/2016	1	⚙️
Circulation and Review			8/17/2016		2	⚙️
Hearing / Decision					3	⚙️
Condition Clearance					4	⚙️

This shows a summary of the Milestone statuses and dates.

Milestone View in Folder Process



Export Options



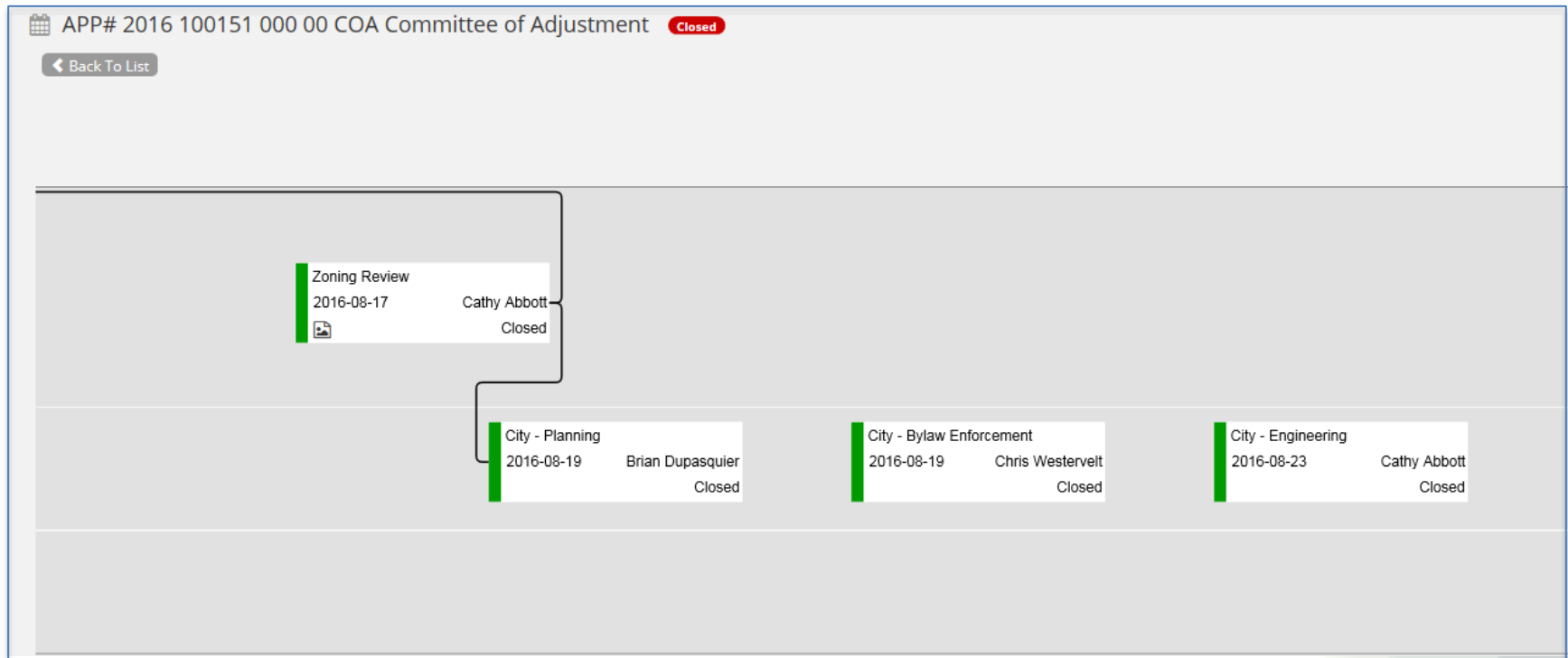
The screenshot shows a software interface with a top navigation bar. On the left is a blue circular help icon with a white question mark. To its right are two buttons: a green 'Options' button with a gear icon and a blue 'Export' button with a share icon. The 'Export' button is open, showing a dropdown menu with a printer icon at the top and three options: 'Export to Excels', 'Export to PDF', and 'Export to PNG'. Below the navigation bar is a table with the following content:

2016 Sep	
37	

Flowchart View

- The flowchart view shows visually the progress of processes within a folder in swim lanes that represent the process groups
- Additional information related to the processes is available in this view, such as flowchart comments and a listing of process documents

Flowchart View in Folder Process



Components & Setup

- Colour (based on process status)
- Swim Lanes (based on Process Group)
- Sorted Left to Right by EndDate, StartDate, ScheduleEndDate, ScheduleDate, DisplayOrder, RSN
- Process Dependency Lines
- Flowchart Comments
- Process Document

Colour in Process Status

The screenshot displays a software interface with a left-hand navigation pane and a main content area. The navigation pane shows a tree structure under 'Folder x' with '118 Rows Returned'. The 'Status' folder is selected, showing a list of status items. The main content area shows a table with the following data:

	Color	Code	Description
<input type="checkbox"/>	Yellow	1	Open
<input type="checkbox"/>	Green	2	Closed
<input checked="" type="checkbox"/>	Green	5	Complete
<input type="checkbox"/>	Red	10	Incomplete
<input type="checkbox"/>	Yellow	15	In Progress
<input type="checkbox"/>	Blue	20	Additional Information
<input type="checkbox"/>	Cyan	21	Active
<input type="checkbox"/>	Light Green	25	Approved
<input type="checkbox"/>	Purple	30	Approved with Conds
<input type="checkbox"/>	Dark Red	35	Denied
<input type="checkbox"/>	Teal	40	Continued

Flowchart Comments

The screenshot displays a software interface with two main sections: 'Process and Defaults' and 'Detail'.

Process and Defaults: This section features a toolbar with icons for '+ Add', 'X Delete', 'Refresh', 'Sort', 'Query', 'Export', and 'Audit'. A search bar on the right contains the text 'PowerStream'. Below the toolbar is a table with the following data:

Code	Description	Description(French)	Deficiency
25100	PowerStream		N

Detail: This section includes a toolbar with 'Save', 'Refresh', and 'Help' icons. It contains a 'Comments' section with a text area and a 'Flowchart Comments' section with a text area. The 'Flowchart Comments' section contains the text: 'External Review processes are currently signed off by COA sta'.

For each Valid Process there is a section where you can set up Flowchart Comments to give more information about the process in the Flowchart View

Process Dependencies

Orientation Folder * COA:Default Setup *

< Status SubType Work Info Fixture **Process** Document Attachment Conditio

Folder Type : COA Permit Type : COA

+ Add X Delete Save Refresh Sort Query Export Audit

Default Process

<input type="checkbox"/>	Code	Description	Folder Stage	Filter Only	Start After Days
<input type="checkbox"/>	25010	Application Review	Associated Process	<input type="checkbox"/>	0
<input type="checkbox"/>	25005	Application Intake	Received	<input type="checkbox"/>	0
<input checked="" type="checkbox"/>	25015	Zoning Review	Associated Process	<input type="checkbox"/>	0
<input type="checkbox"/>	25000	Committee of Adjustment	Associated Process	<input type="checkbox"/>	0
<input type="checkbox"/>	25080	Additional Comments	Associated Process	<input type="checkbox"/>	0
<input type="checkbox"/>	25055	Hearing	Circulated	<input type="checkbox"/>	0
<input type="checkbox"/>	25022	City - Fire	Associated Process	<input type="checkbox"/>	0
<input type="checkbox"/>	25024	City - Forestry	Associated Process	<input type="checkbox"/>	0

Dependent Process Default Folder Process User

Orientation Folder * COA:Default Setup * **Process Dependent ***

+ Add X Delete Save Refresh Sort Query Export Audit Help

<input checked="" type="checkbox"/>	Type	Process	Depend on Process	Start After Days	Type	Status
<input checked="" type="checkbox"/>	COA	Zoning Review	25010 Application Review	0	Working days	Open

Flowchart Comments

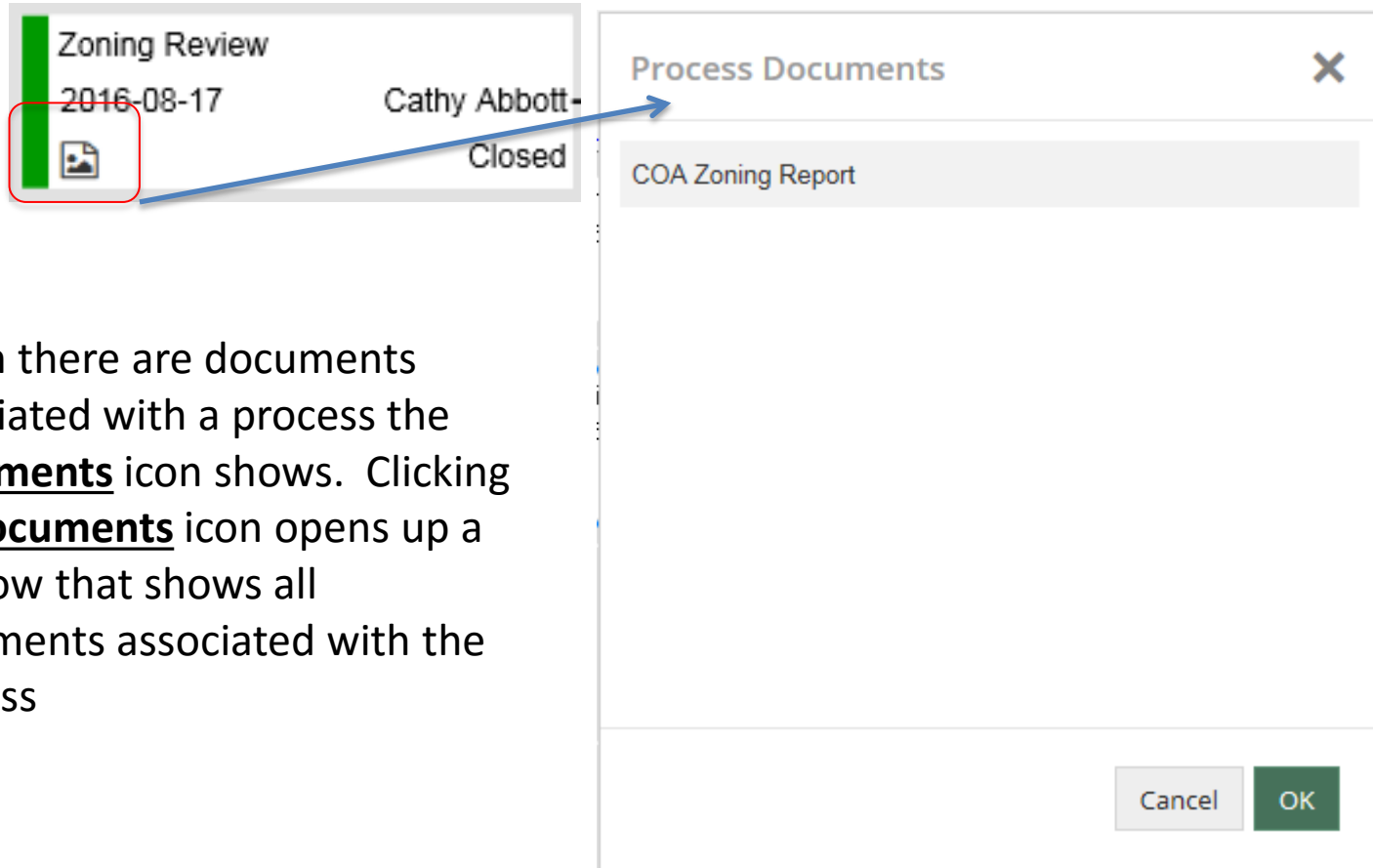


The image shows a screenshot of three flowchart process cards. Each card has a green vertical bar on the left, a title, a date, a name, and a status. A red box highlights a speech bubble icon on the first card. A blue-bordered callout box points to this icon, containing the text: "External Review processes are currently signed off by COA staff when information is received."

Region	Date	Name	Status
Region - Planning	2016-08-29	Cathy Abbott	Closed
Region - Engineering	2016-08-29	Cathy Abbott	Closed
Conservation Authority	2016-09-01	Cathy Abbott	Closed

When you hover over the Comments section of the process the detail written in the Flowchart comment appears.

Process Documents



The screenshot displays a software interface. On the left, a process card for 'Zoning Review' is shown with the date '2016-08-17', the name 'Cathy Abbott', and the status 'Closed'. A red box highlights a document icon on the card, with a blue arrow pointing to a 'Process Documents' window on the right. The window title is 'Process Documents' and it contains a list with one item: 'COA Zoning Report'. At the bottom of the window are 'Cancel' and 'OK' buttons.

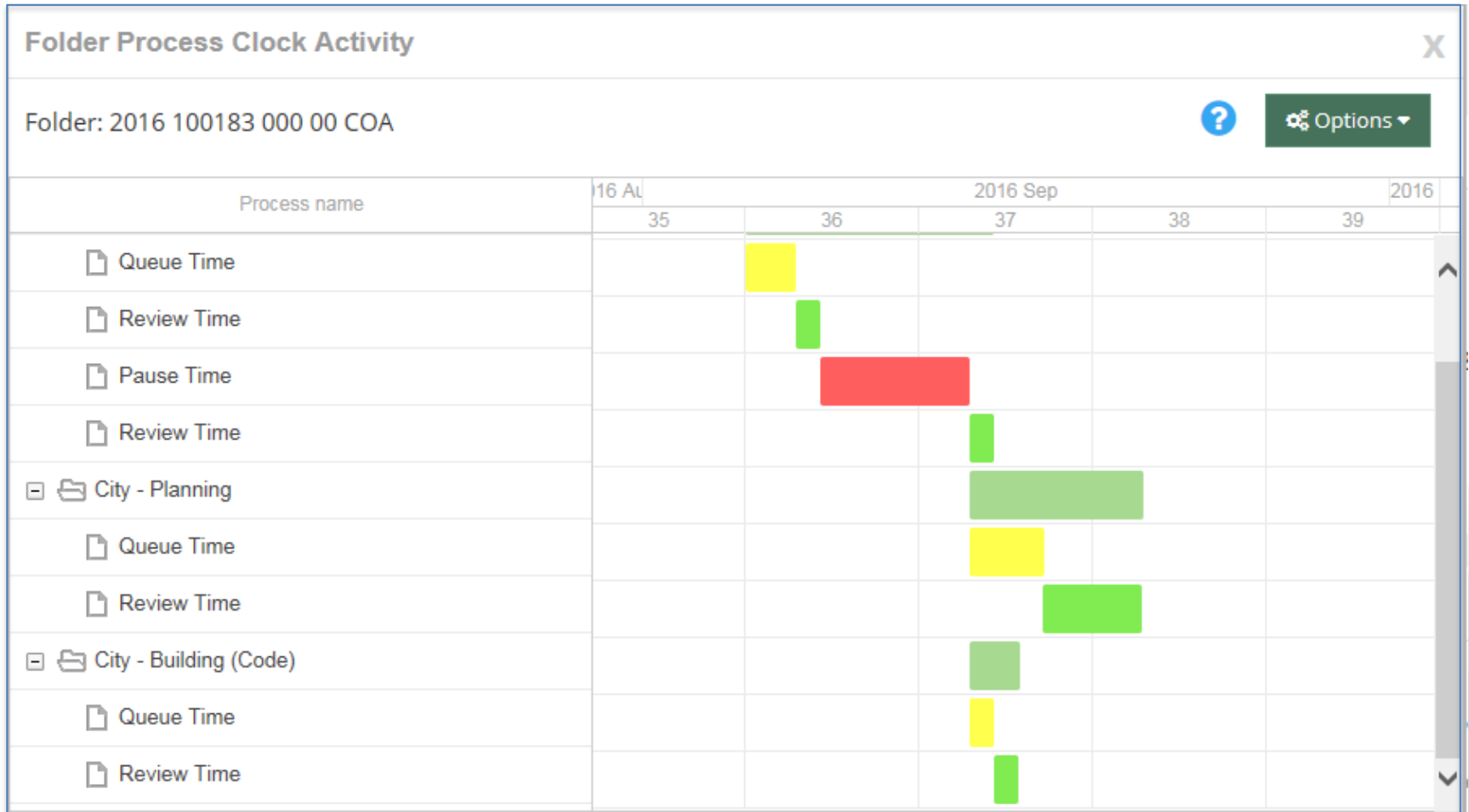
When there are documents associated with a process the **Documents** icon shows. Clicking on **Documents** icon opens up a window that shows all documents associated with the process

Milestone Monitor / Process Clock

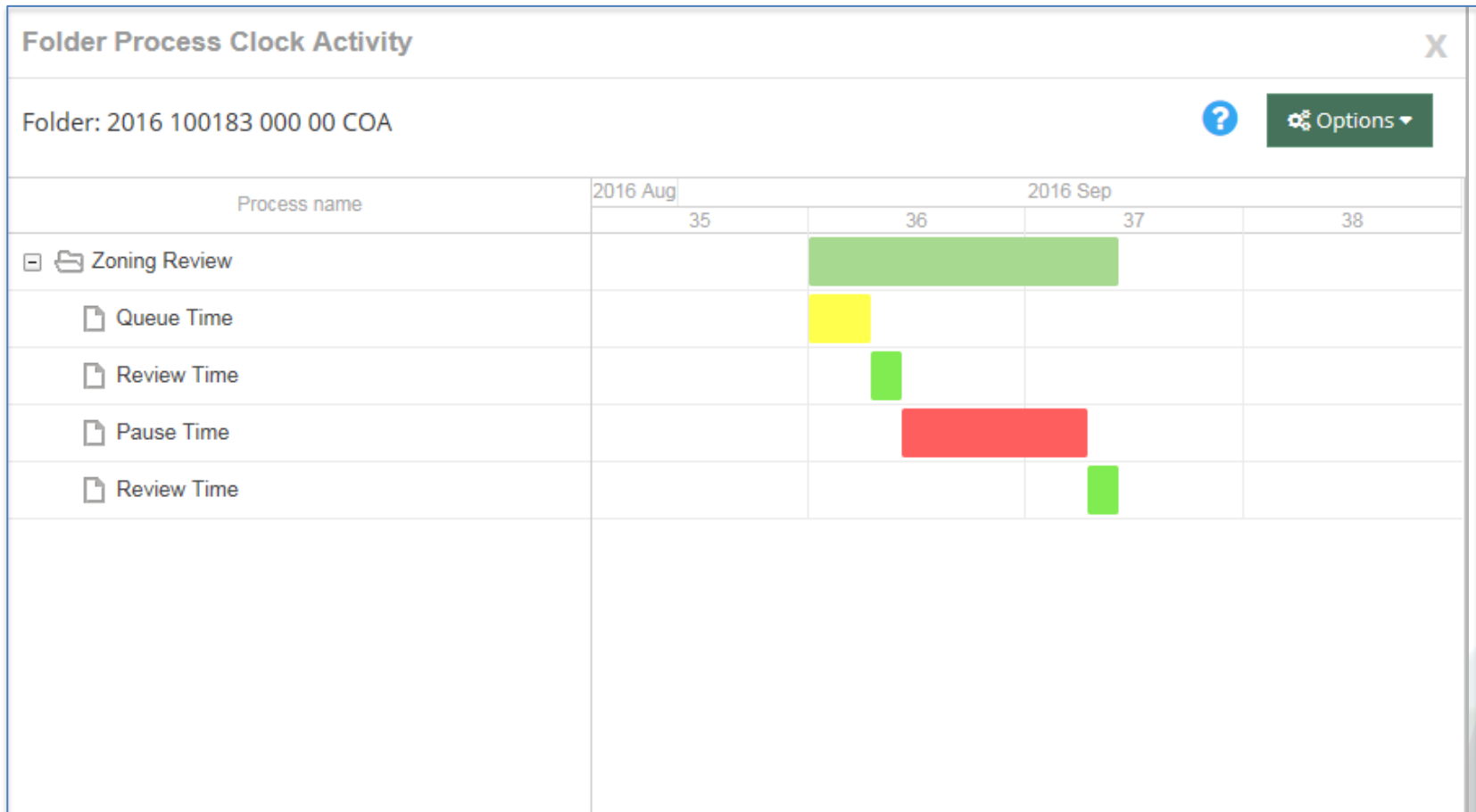
Concept of Queue Time, Review Time, Pause Time

- Queue Time  – Time between when an application is received and when review is started.
- Pause Time  – Time when we are waiting for information from the applicant
- Review Time  – Time that staff are spending on the review.

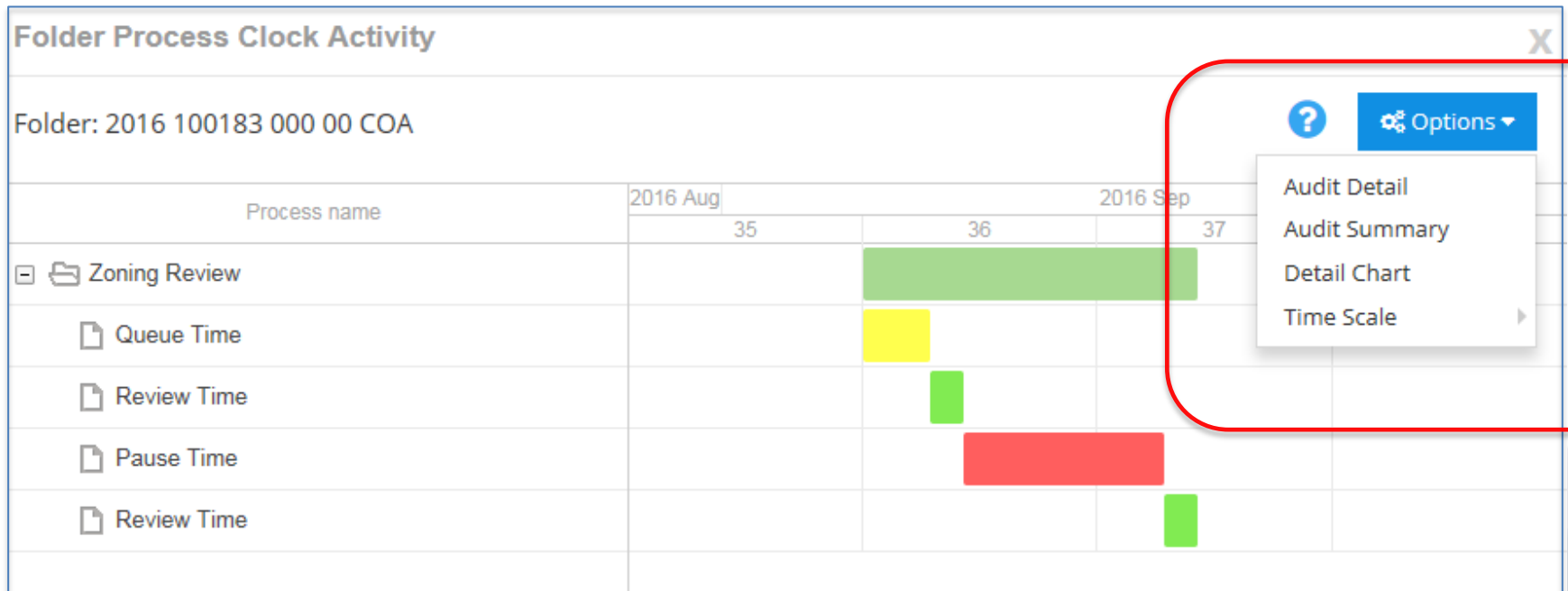
Process Activity on Main Folder Screen Visual Chart



Activity for each process on Folder Process Tab



Milestone Monitor Reports



Mechanism for Milestone Monitor / Process Clock

Attempt Result

+ Add ✖ Delete 💾 Save ↻ Refresh ⬆️ Sort 📄 Query 📄 Export 🔍 Audit ? Help Search Search

<input type="checkbox"/>	Code	Description	Description(French)	Process Status	Clock Stat
<input type="checkbox"/>	257	Adjourned to Date	Description(French)	0 Process Status	Clock Status
<input type="checkbox"/>	258	Adjourned Sine Die	Description(French)	0 Process Status	Clock Status
<input type="checkbox"/>	259	Approved as Amended	Description(French)	0 Process Status	Clock Status
<input type="checkbox"/>	261	Request Adjournment	Description(French)	0 Process Status	PAUSE
<input type="checkbox"/>	262	Additional Variance	Description(French)	0 Process Status	PAUSE
<input type="checkbox"/>	263	Additional Info Required	Description(French)	0 Process Status	PAUSE
<input type="checkbox"/>	267	Complete No Conditions	Description(French)	0 Process Status	END
<input type="checkbox"/>	268	Re-Assign	Description(French)	0 Process Status	Clock Status
<input type="checkbox"/>	269	Complete With Conditions	Description(French)	0 Process Status	END
<input type="checkbox"/>	270	Close File	Description(French)	0 Process Status	END
<input type="checkbox"/>	275	Re-Circulate	Description(French)	0 Process Status	Clock Status
<input type="checkbox"/>	276	Site Visit	Description(French)	1 Open	Clock Status

Cashier Module – New Look and Fee

AMANDA

Cashier

Payment Batch | New Payment

Status: All | Date From: | Date To: Oct 22, 2008 | Search

Batch# | Entries:

Refresh

Batch No.	Batch Date/Time	User	Entries	Total	Status	AMANDA Entries	AMANDA Total
117	Oct 20, 2008 13:37:11	Anthony Du'ong	15	\$432.10	Open	1	\$5.00
115	Oct 15, 2008 10:18:27	Jack Smith	6	\$235.00	Open	1	\$150.00

New Batch F1
 Set Batch F2
 Close Batch F3
 Post Batch F4

Print Batch Summary Ctrl 1
 Print Batch Detail Ctrl 2
 Print Current Detail Ctrl 3
 Re-Print Receipt Ctrl 4
 Re-Endorsement Ctrl 5

No. of Receipts: 1
 Use Default Printer:

A6

List of Payment Batches

+ New Batch

Status: All | Date From: Date From | Date To: 9/15/2016 | Receipt #: Receipt # | Payment Type: All | Search | Reset

Batch#	Batch Date	User	Status	Stamp Date	TOTAL		AMANDA		OPEN TAX		GENERAL		EXTERNAL		Options
					Entries	Total	Entries	Total	Entries	Total	Entries	Total	Entries	Total	
+ 17	9/15/2016	Cathy A...	Open	9/15/2016	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	⚙
+ 16	8/10/2016	Cathy A...	Closed	9/15/2016	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	⚙

A7

Adding Payments to a Batch

		TOTAL		AMANDA		OPEN TAX		GENERAL		EXTERNAL					
Batch#	Batch Date	User	Status	Stamp Date	Entries	Total	Entries	Total	Entries	Total	Entries	Total	Entries	Total	Options
+ 17	9/15/2016	Cathy A...	Open	9/15/2016	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	
+ 16	8/10/2016	Cathy A...	Closed	9/15/2016	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	

- Add Payments
- Close Batch
- Post Batch
- Print Batch Summary
- Print Batch Detail

Add Payment(Batch #17)

AMANDA(F1) GENERAL(F3)

Group	Folder/Transaction ID	Transaction Type	Date	Amount Due	Amount Applied	Quantity	Bill #	Comments
General	5	Copies	9/15/2016	\$7.50	\$7.50	15		Qty: 15 \$0.5 each
COA	1460		9/15/2016	\$1,637.00	\$1,637.00		686	
SUBTOTAL				\$1,644.50	\$1,644.50			
HST				\$0.98	\$0.98			
TOTAL				\$1,645.48	\$1,645.48			

Payments + Add Payment

Payee Name	Payment Type	Amount	Location	Remarks
Cathy Abbott	Cheque	\$1,645.48	City Hall Cashier	Remarks

TOTAL TENDERED \$1,645.48
CHANGE DUE \$0.00
 Always Print Receipt
 Always Print Endorsement

Cashier – Batch Summary Report

Saskatchewan Power



Requested By: Cathy Abbott

Run Date: 9/23/2016 13:04

Batch Selected: 17

Accounting Date: 9/15/2016 10:41

Revenue Description	AMEX	Cash	Cheque	Mastercard	Visa
111					
760001			1587		1886.5
General Payment			3224		3780.5
Sub Totals			3224		3780.5
Sub Totals					
Batch Totals			3224		3780.5

Cashier – Detailed Report

Saskatchewan Power

| CASHIER BATCH DETAILED REPORT

Requested By Cathy Abbott

Page 1 of 1

Batches 17

Run Date: 9/23/2016 13:05

Accounting Date: 9/23/2016 13:05

BATCH	FOLDER #	FOLDER NAME	RECEIPT #	APPLIED	PAID AMOUNT	DATE	TYPE	PAID BY	REMARKS	Void
17	Photographs		25	7.5	1894	9/23/2016 00:00	VISA	Sara Funduk		<input type="checkbox"/>
CommentQty: 15 \$0.5 each										
17	HST		25	0		9/23/2016 00:00				<input type="checkbox"/>
CommentHST										
17	16100179COA	16 100179 COA	25	1894		9/23/2016 00:00				<input type="checkbox"/>
Comment										
				1901.5	1894					
17	Parking Fine		26	50	1637	9/23/2016 00:00	CHEQ	Ryan Funduk		<input type="checkbox"/>
CommentQty: 2 \$25 each										
17	HST		26	0		9/23/2016 00:00				<input type="checkbox"/>
CommentHST										
17	16100175COA	16 100175 COA	26	1637		9/23/2016 00:00				<input type="checkbox"/>
Comment										
				1687	1637					
17				Sub Batch Total:	3531					
				Grand:	3531					

Records Retention

- Deleting old data is a valid means to reduce system storage requirements
- Most levels of government have guidelines on minimum periods of data retention and when records should be destroyed (if ever)
- Based on the Records Retention functionality in AMANDA's Freedom Information module we have extended this functionality throughout AMANDA.

Two Automated Background Processes

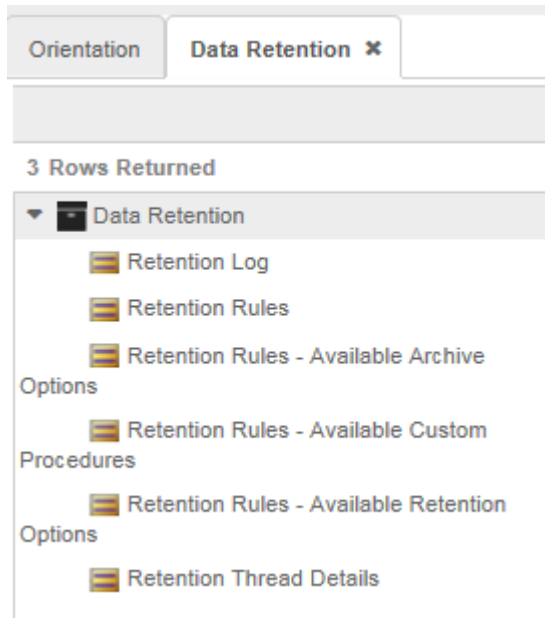
- Process #1
 - 1st Detect Folder(s) ready for R&D based on
 - Folder has Folder Status = Ready to be Archived/Disposed
 - Folder currently has a blank Disposal Date
 - 2nd Set folder's Disposal Date based on folders 'Stamp date' plus the select 'Retention Period' of the folder type.

Two Automated Background Processes

- Process #2
 - 3rd Execute the configured Archive and/or Disposal Rule on all folders with a Disposal date = Today or earlier.

Admin Setup for Records Retention

- Admin -> System -> Data Retention



Rules Applied to each Folder Type

Folder Type and Defaults ↻

+ Add ✖ Delete ↻ Refresh ↕ Sort 📄 Query 📄 Export 🔍 Audit 📄 Copy 🔍 Search

Color Code	Folder Type	Description	Description(French)
	COA	Committee of Adjustment	

Detail **Data Retention** Disclaimer Financial Defaults FOI Folder Agency Setup Folder Bond Permission User Permission Security Group Report ↻ ↻

💾 Save ↻ Refresh ? Help

Folder Status to start Retention
The retention status. The displayed statuses are default status for this Folder.

Retention Period
Number of days "old" from the Folder. Stamp Date of the Folder Types.

Retention Period Unit
The Retention Period Units.

Retention & Disposal Rule
Retention Rule Names.

QUESTIONS / COMMENTS?

THANK YOU