



Councils – Release 16 Notes



Contents

Contents.....	2
Add text to 'Pay via Portal' payment method.....	4
Who needs to know this?	4
Summary	4
Don't validate form fields that are hidden by logic	5
Who needs to know this?	5
Summary	5
Consent Document Handling Process.....	6
Who needs to know this?	6
Summary	6
Add payment date field to payments list.....	11
Who needs to know this?	11
Summary	11
Edit specific form version details	11
Who needs to know this?	11
Summary	11
Improve customer collaboration visibility	12
Who needs to know this?	12
Summary	12
Link SRFI to section vetting officer creates it in.....	12
Who needs to know this?	12
Summary	12
Technical Release Notes – API	14
Who needs to know this?	14
Summary	14
Quick Application (Submission Wizard)	15
Who needs to know this?	15
Summary	15
Who's Involved in the Build? - Admin.....	18
Who needs to know this?	18
Summary	18
Who's Involved in the Build? - Customer	19
Who needs to know this?	19



Summary	19
S/RFI Associated Document bug fixed	20
Who needs to know this?	20
Summary	20
Data Export Date Formats Fixed	20
Who needs to know this?	20
Summary	20

Add text to 'Pay via Portal' payment method

Who needs to know this?

GoShift Admin Users

Summary

GoShift Admin users now can configure the text that is displayed in the 'payment information' of 'Payments requested via the portal'. This operates the same as the existing direct payment information section. This text is configurable to each individual council.



Council Account	Is Public?	Is Enabled?	
Filter by Council Account			🔍 ✖
Area Outside Territorial Authority	Yes	Yes	✏
Ashburton District Council	Yes	Yes	✏
Auckland Council	Yes	Yes	✏

PxPay Key *

PxPay User ID *

Auto Lodge for Direct Payment? Yes No

Direct Payment Info

Account number: Test account number
Reference: 000 0000

Path:

Portal Payment Info

Account 2 account transactions requiring multiple signatures are unable to be processed through the payment gateway. Please instead use another available method.

Figure 2 - Where to edit text

Payment Review [DEMO002399]

Submission Details

Submission Ref: DEMO002399
Council: Demo City Council
Status: Lodged
Site Address: Demo Address 1, Demo City 0000
Consent Number: 1234567890
Submitter: Tester (Preprod User - Jashon)
Date Submitted: Wed 27 Jun, 3:39 PM

Payment Details

Payment Reference: DEMO002399
Payment Method: Portal
Payment Status: Awaiting Payment

Item	Amount
Quick Submission (testing)	\$132.00
Total	NZD \$132.00

Payment Instructions:
Account 2 account transactions requiring multiple signatures are unable to be processed through the payment gateway. Please instead use another available method.

Figure 1 - Where text displays

Don't validate form fields that are hidden by logic

Who needs to know this?

GoShift Admin users

Summary

With the addition of validation controls for fields released last sprint there was a bug occurring where hidden fields were still trying to validate. This has been fixed in this release.

Consent Document Handling Process

Who needs to know this?

GoShift Admin Users, Customers, primarily integrated council users however all councils will have access to this feature/process.

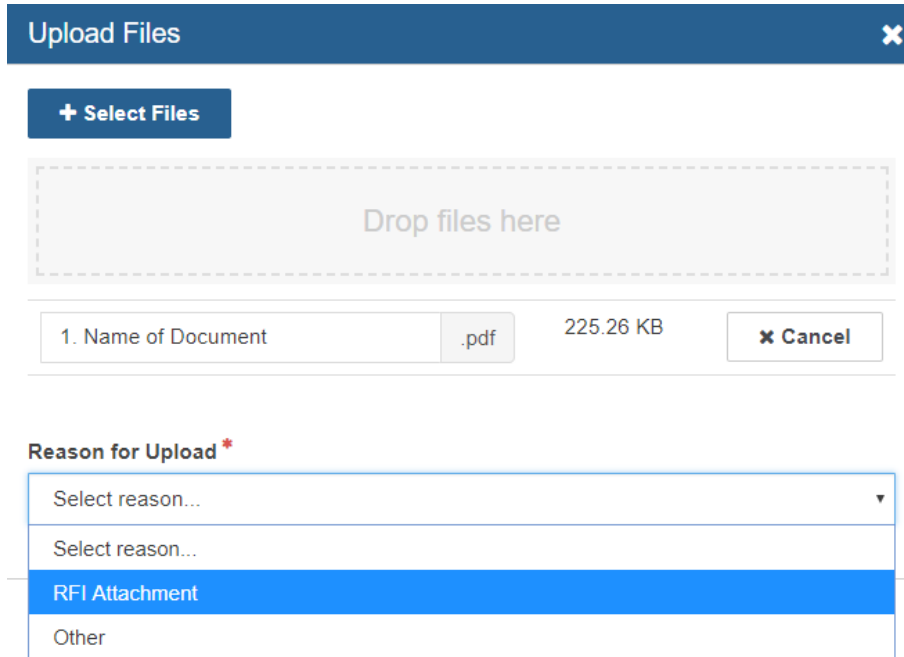
Summary

Consent documents now has a reason for upload, the reason for upload will appear when the consent is in the RFI stage. If the Consent is at the RFI stage, please select RFI attachment so that it is provided to the Council in the right format. The other option is provided throughout the Consent but must be vetted through the portal and approved before the document is sent to Council. This means that whenever a customer uploads a document to a 'consent' outside of the RFI process, this file will enter a pending state.

Councils will then vet it, choosing to either accept or reject the document. If the document is rejected, then the council user must provide a reason for the rejection. All documents uploaded in both the submission and consent stages that are uploaded to the submission/consent document list, must be supplied with a reason for upload. Both the upload and reject reasons are visible to relevant parties.

RFI Attachment

1. Select a document to upload and choose “RFI Attachment”, documents uploaded as an “RFI attachment” will be provided to the Council as part of the RFI response and not require additional checks to be completed.



The screenshot shows a web interface for uploading files. At the top is a dark blue header with the text 'Upload Files' and a close button (X). Below the header is a blue button with a plus sign and the text '+ Select Files'. Underneath is a dashed box containing the text 'Drop files here'. Below the drop zone is a file upload progress bar showing a file named '1. Name of Document.pdf' with a size of '225.26 KB' and a 'Cancel' button. Below the progress bar is a section titled 'Reason for Upload' with a red asterisk. A dropdown menu is open, showing four options: 'Select reason...', 'Select reason...', 'RFI Attachment' (which is highlighted in blue), and 'Other'.

Figure 3 - Upload Reason RFI Attachment

Other

2. Select a document to upload and choose “Other”, documents uploaded as an “Other attachment” will enter a pending state and require an additional check by the Council.
3. The following message will be provided when uploading an “Other document”, although notifications will be provided to the Council it is recommended if you are uploading documents outside of the normal RFI process that you discuss with the Council prior to uploading if you are unsure of the current state of the consent i.e. if the processing is nearing completion and you want to provide supporting information for the application, it may mean delays in issuing the consent if additional processing is required.

When uploading a document outside of the RFI process it will automatically be put into a pending state, there is no guarantee that it will be accepted by the Council.

The Council will be notified that additional information has been uploaded but it may be rejected if the processing has already been completed or the information is insufficient. It is suggested that you discuss any additional information with the Council prior to uploading the document and provide a detailed summary of why the additional information is required.

Upload Files ✕

+ Select Files

Drop files here

1. Name of Document	.pdf	225.26 KB	✕ Cancel
---------------------	------	-----------	-----------------

Reason for Upload *

Other

When uploading a document outside of the RFI process it will automatically be put into a pending state, there is no guarantee that it will be accepted by the Council.

The Council will be notified that additional information has been uploaded but it may be rejected if the processing has already been completed or the information is insufficient. It is suggested that you discuss any additional information with the Council prior to uploading the document and provide a detailed summary of why the additional information is required.

Reason for Upload *

Upload **Cancel**

Figure 2 - Upload Reason Other documents

4. Enter a reason for the upload, the reason should provide enough information for the Council to understand why the extra information has been provided and if you have discussed with the Council there should be reference to the discussion.

- The document will enter a pending state and Councils will be provided a notification that additional documents have been uploaded. These can be viewed under the “Documents” tab within the application.

Pending Documents



Category	Document Name	Uploaded	Download
Consent Files	Events Calendar 2	Mon, 2 Jul 2018	 

Figure 4 - Council pending doc list

- The Council will either accept or reject the document/s being uploaded.

Document File ✕

Category

Document Name *

Reason for Upload *

Associated Document

Events Calendar 2

Accept or Reject Document? *

Accept
 Reject

Reason for Rejection *

Cancel

Submit

Figure 5 - Council document upload view

- Once documents have been assessed by the Council they will be displayed under the “Documents” tab within the application.

Consent Documents







Category	Document Name	Status	Uploaded	Download
Consent Files	Events-Calendar-2	Rejected	Mon, 2 Jul 2018	 
Consent Files	Live Chat Customer Chat	Pending	Mon, 2 Jul 2018	  

Figure 6 - Customer view with differing statuses

- Customers can delete and replace documents that are in pending status, once the document/s have been reviewed by the Council the option to replace is no longer available.

Document File 

*This file is in pending status and is awaiting council acceptance.
You may still replace the associated file up until the file is accepted.*

Category

Consent Files

Document Name

Live Chat Customer Chat

Reason for Upload

Something else

Associated Document

Live Chat Customer Chat

Replacement Document *

Choose File

 No file chosen

Replace

Cancel

Figure 7 - Customer replace file

Add payment date field to payments list

Who needs to know this?

Council and customer users

Summary

The payments list now contains a column titled 'Payment Date' which displays the date of which the payment was made.

Payment Ref	Payment Method	Amount	Invoice File	Status	Created On	Payment Date	
TEST002410	Portal	\$54.00		Complete	Fri 29 Jun, 2:17 PM	Fri 29 Jun, 2:17 PM	>
TEST002410	Direct	\$5.00		Awaiting Payment	Fri 29 Jun, 2:18 PM		Notify Paid >
TEST002410	Portal	\$235,235.00		Awaiting Payment	Fri 29 Jun, 2:29 PM		>

Edit specific form version details

Who needs to know this?

GoShift Admin Users

Summary

The following fields are now editable for each form version:

- Fields version label
- Release notes
- Form title
- Form description

Improve customer collaboration visibility

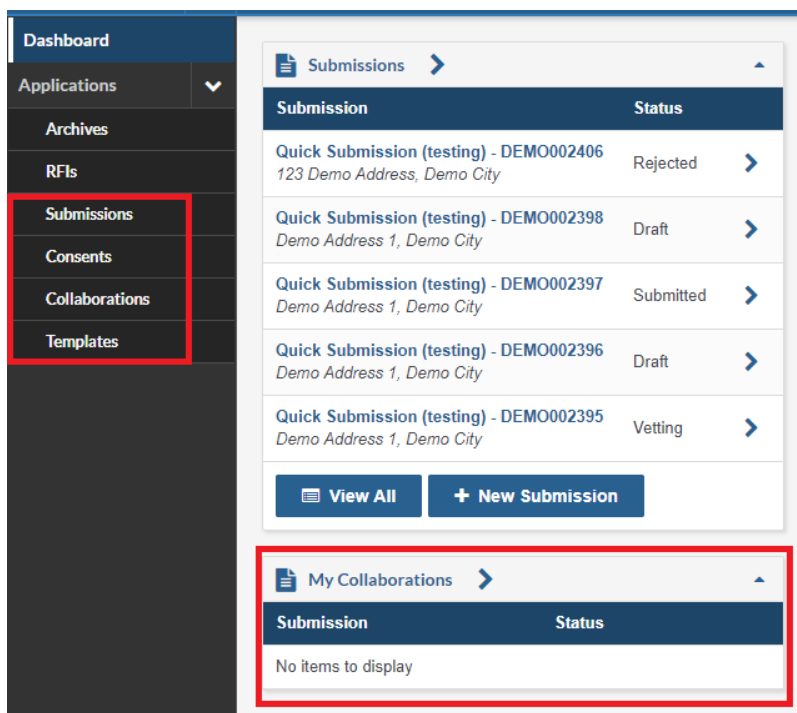
Who needs to know this?

Customers

Summary

Customers have now been supplied with a collaborations widget which displays their 5 most recent collaborations.

Alongside the widget, different submission types have been split out into their own navigation bar headers making them all easier to find and navigate to.



Link SRFI to section vetting officer creates it in

Who needs to know this?

Council and customer users

Summary

Whenever a SRFI is created in a specific section of the form by the vetting officer, the SRFI will contain details of the section that it was created in.

Respond to Request for Further Information - 1 ✕

Council has requested that you provide further information before they can accept your application. You should modify your application as applicable, upload any additional supporting files, and explain the changes you have made in the response field below.

Created in form section:

What Are You Applying For?

Request Details *

Wrong box checked

Response *

Associated Document

No file chosen

Raised By

Tester 1

Submitted

Mon 2 Jul, 10:43 AM

Figure 8 - Customer view of SRFI

Technical Release Notes – API

Who needs to know this?

Portal Integrators who use the consent API

Summary

Consent API will now include payment information about a submission.

```
Returns: {  
  "submission_guid": "839ad7db-95d0-fd84-8dab-9d506bc38aa9",  
  "council_code": "LOCAL",  
  "submission_payment_guid": "2c6e7321-8ed9-c694-ad33-5a2a15769629",  
  "payment_reference": "LOCAL001234",  
  "payment_method": "direct",  
  "payment_description": "Test"  
  "notified_of_payment": false,  
  "payment_date": "2018-06-08 03:48:25",  
  "total_amount": "34",  
  "total_paid": "34",  
  "payment_status": "COMPLETE",  
  "created_on": "2018-06-08 03:47:51"  
}
```

Quick Application (Submission Wizard)

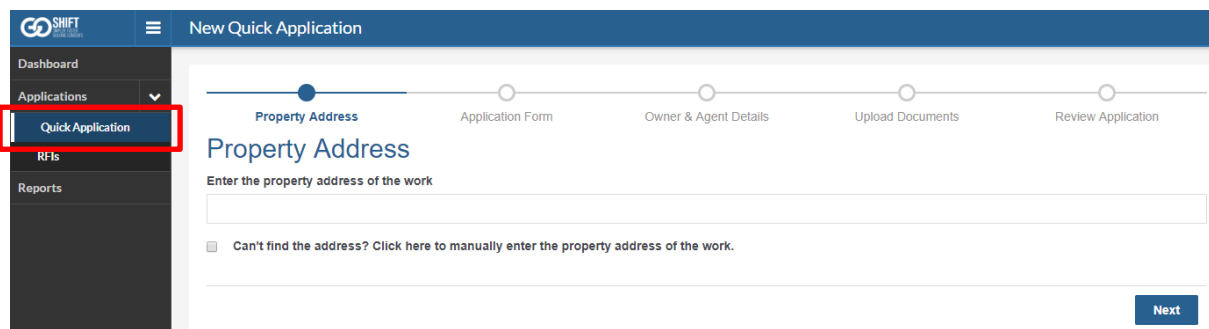
Who needs to know this?

Council Users who are likely to enter a submission on behalf of end users.

Summary

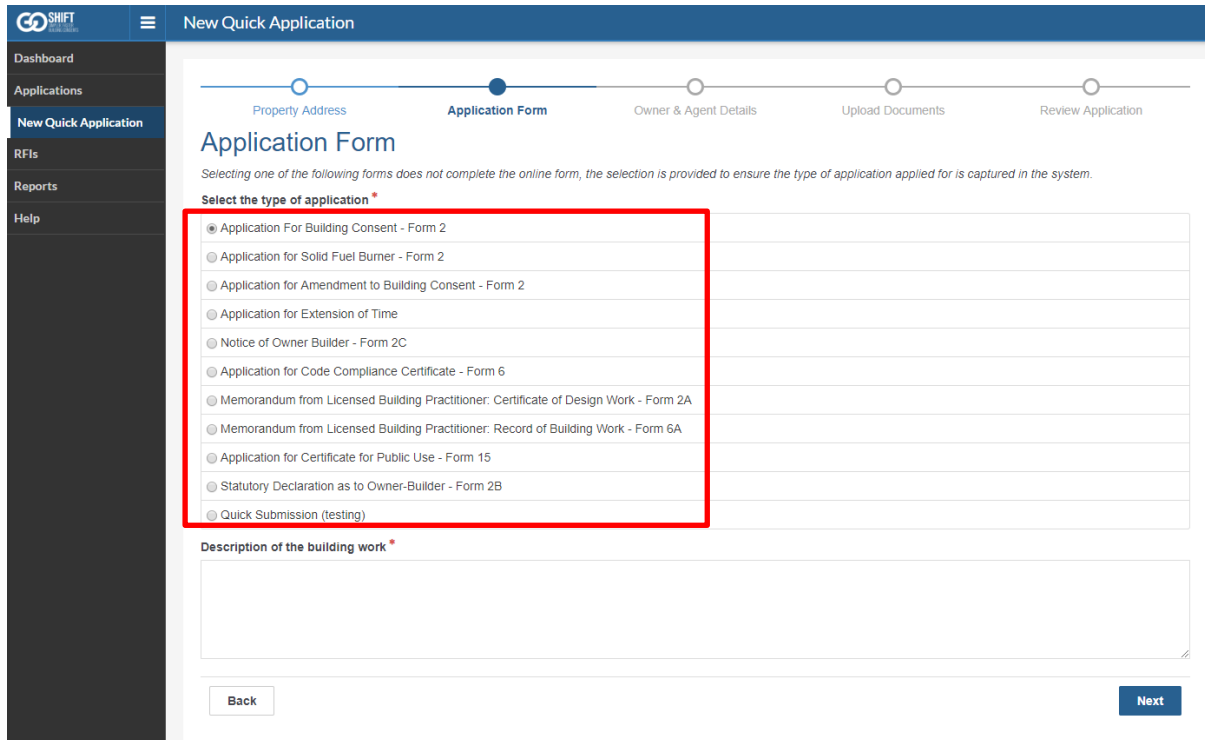
The quick submission wizard enables Councils to push paper-based applications through the same channel as applications through the portal. When a customer brings in or mails in a paper-based submission form, it can be put through the portal by the followed method:

1. Click 'Quick Application' from the left-hand menu



Selecting the 'Quick Application' option

2. Enter the applicable property address for the submission.
3. Select the desired form by clicking the applicable radio button

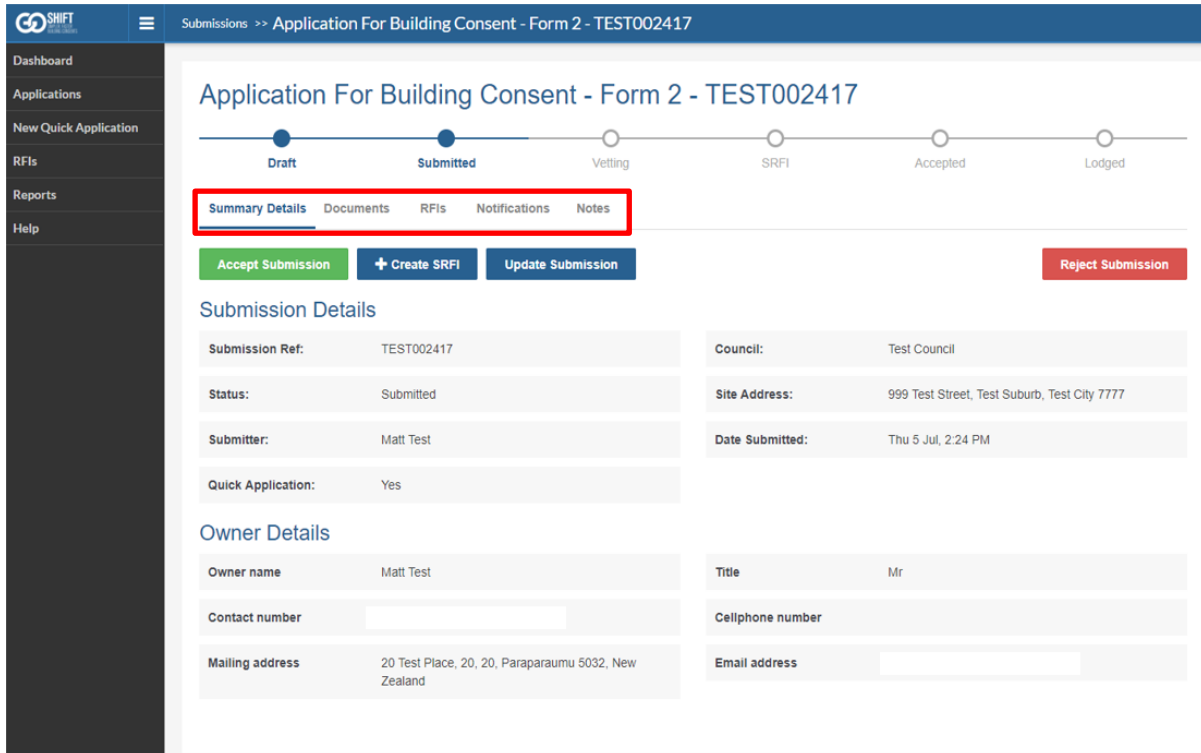


Selecting the form, you want to use

4. Add in a description of the Building work and then click 'Next'
5. Add in the Owner details for the submission
6. If there is an Agent for the submission, select 'Yes' at the "Is there an Agent?" question and complete the fields accordingly.

Note: Adding in the Owner and the Agent enables the portal to send the applicable notifications to the customer when necessary.

7. At the 'Upload Documents' page, upload all applicable documents. For example, this could be the scanned application form, the scanned plans or specifications.
8. Once the applicable documents have been uploaded, you will get a chance to review the information you have entered thus far.
9. If the information in the form is correct, click 'Submit'.
10. If you need to change any information you have entered, simply click on the applicable stage from the stages progression line at the top of the page.
11. Once you have clicked 'Submit' you will be presented with the following screen:



Application For Building Consent - Form 2 - TEST002417

Progress: Draft (Completed), Submitted (Completed), Vetting (Pending), SRFI (Pending), Accepted (Pending), Lodged (Pending)

Navigation: Summary Details (Active), Documents, RFIs, Notifications, Notes

Actions: Accept Submission, + Create SRFI, Update Submission, Reject Submission

Submission Details

Submission Ref:	TEST002417	Council:	Test Council
Status:	Submitted	Site Address:	999 Test Street, Test Suburb, Test City 7777
Submitter:	Matt Test	Date Submitted:	Thu 5 Jul, 2:24 PM
Quick Application:	Yes		

Owner Details

Owner name	Matt Test	Title	Mr
Contact number		Cellphone number	
Mailing address	20 Test Place, 20, 20, Paraparaumu 5032, New Zealand		
		Email address	

12. Once on the summary details screen, you should vet the paper submission as you normally would a non-portal submission.
13. Via the tabs along the top of the submission, you can:
 - **Documents** – Upload or download documents as necessary, e.g. scanned versions of the submission and/or electronic versions provided to the Council.
 - **RFI's** – Create RFI's which will be sent to the owner and/or agent via a notification.
 - **Notifications** – View all notifications for this submission
 - **Notes** – Add notes to the submission
14. When you click the 'Accept Submission', you will be taken to the payment screen where you outline how the customer should pay for the required service, as per the standard portal process.
15. If you 'Reject' the submission, as per the standard process you will be requested to provide a reason for the rejection and this will be emailed to the customer.

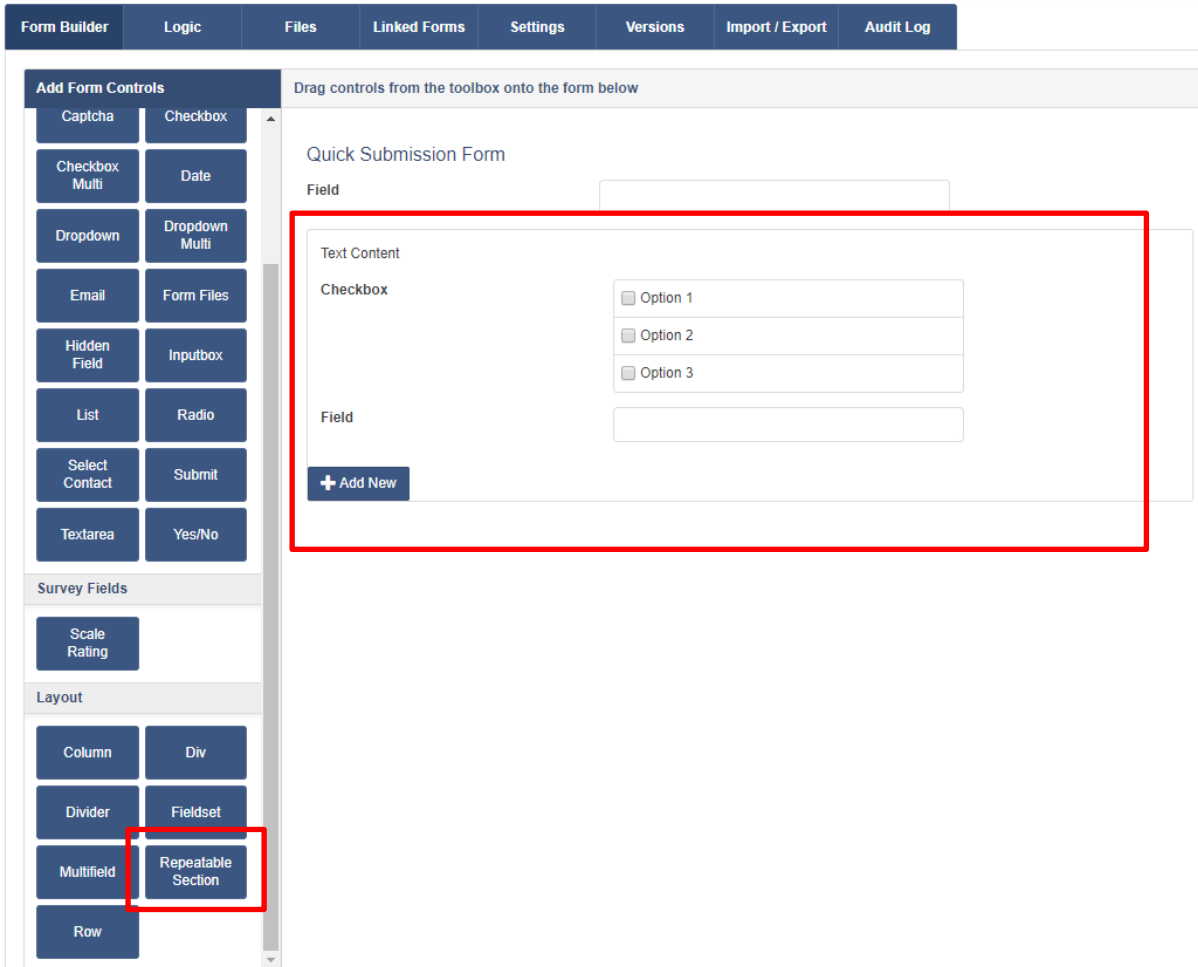
Who's Involved in the Build? - Admin

Who needs to know this?

GoShift Users who use the Form Builder

Summary

The form builder has a new component in the 'Layout' section called 'Repeatable Section'.



The new 'Repeatable Section' component and corresponding form field.

When dragged into a form, other form components can be added into it.

Once published and the form user has completed this section, they can click '+Add New' and the section will be repeated for additional form entries.

Who's Involved in the Build? - Customer

Who needs to know this?

End Users who submit forms to Councils

Summary

The 'Who's Involved In The Build' section has been updated to enable a quicker, easier way to add multiple Licensed Building Practitioners (LBPs) to a Building Consent Submission.

Who's Involved In The Build? ^

Please supply names, registration and contact details of the designer, architect, structural engineer and other key individuals involved in your project (such as carpenter, plumber, gasfitter).

For commercial applications, the details of the fire safety designer who produced the 'fire report' must be provided.

Trade ✕

-- Please Select -- ▼

Name

Address

Contact number

Email

Registration number

[+ Add New](#)[Next Section](#)

The updated 'Who's Involved in the Build section'

Users must now select the role of the additional person being added to the building consent.

By clicking the 'Add New' button, additional LBPs can be added to the submission.

S/RFI Associated Document bug fixed

Who needs to know this?

End Users

Summary

When saving a draft response to an S/RFI with a file attached, previously, the file was being overwritten on the next save. This no longer happens.

Data Export Date Formats Fixed

Who needs to know this?

GoShift Admin Users and Council Users

Summary

When exporting report data, the dates are now in the correct format and are able to be filtered and sorted.