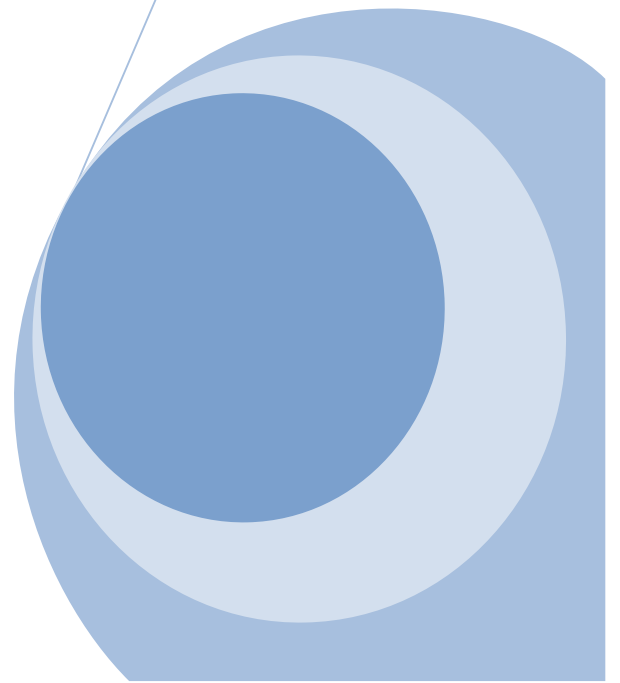


## **Water Module**

### **Quick User Guide**

This Quick User Guide will instruct users in how to create a Water Account and Meter, splitting an Account and maintaining Water records for the Ashburton District Council business environment.



## Software Type

Technology One Property and Rating Ci Version 10.03

## Link to Document

TechnologyOne Property & Rating User Assistance – Water - Release 10.3

## Version Control

Version Number	Comment
1.0	Initial Version
2.0	Version Completed 27/11/2009
3.0	Release Issue

# Table of Contents

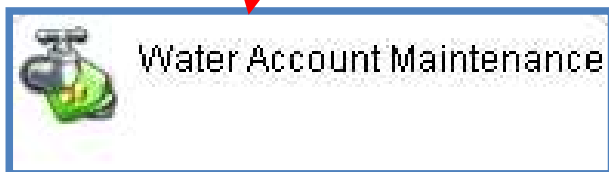
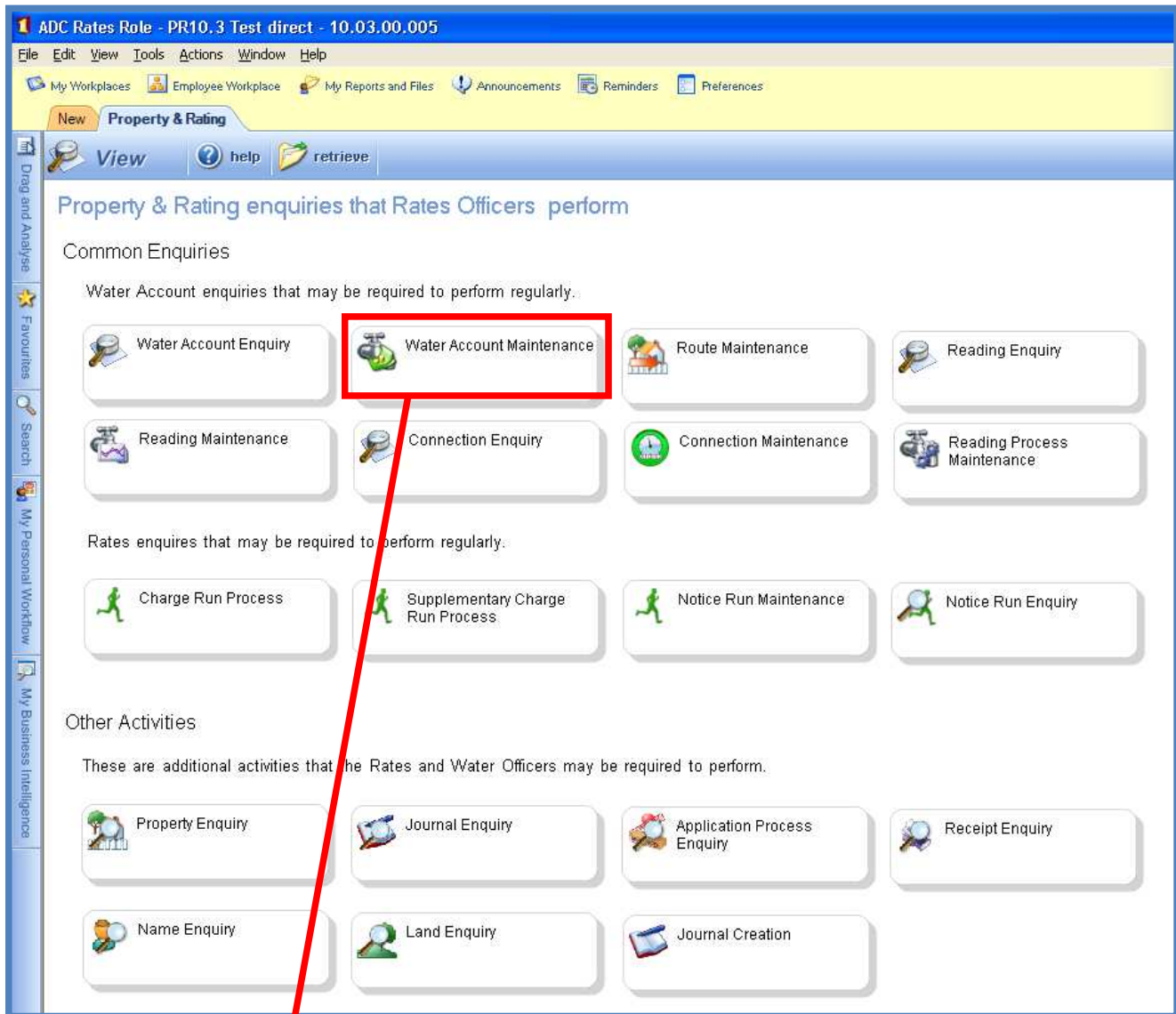
1	Background .....	4
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# 1 Background

1. This Quick User Guide is created in conjunction with the selected Key End User for their particular Property and Rating Module.
2. Note that the process remains the same as already exists in the current Proclaim version 9.09.02, it is only visually different.
3. The documentation produced by the Events have been checked at UAT level and have been signed off as being in the current format being with Proclaim version 9.09.02
4. Any Change Requests whether it is with formatting or the actual process will be logged and investigations will begin after the upgrade to Technology One Property and Rating Ci version 10.03
5. There is a delay on Creating a Reading Process which will be completed and signed off at a later date
6. This Quick User guide is intended to give the Users a quick guide to getting started in the new environment, it will not be a conclusive document and will be built upon following the implementation of the Project.

## 2 Application Wizard

To create a Water account, go to the Property & Rating Workplace



Click on ***Water Account Maintenance***

### 3 Creating a Water Account and Meter

Creating a Water Account and Meter can come from a Request – either new or a replacement

ACL (Ashburton Contracting Limited) may email the Finance department of a new or a replacement Meter in which case they will advise the Ashburton District Council the meter number, location address and initial reading. The Finance department give the meter a sequence number from a spreadsheet which is owned by ACL

New commercial business – there is no set process to inform finance that a property requires a Water Meter within the Ashburton Township, There is currently an auditing process is used to capture this information outside of the town i.e. Methven, Rakaia etc. This process is expected to be expanded to capture the information within the Town

**Water Account**

Account Number: [Autogenerate] 🔍

---

**General**

Water Account

Property ID:\* 12345 🔍 27 Suffolk Street, ASHBURTON

Schedule ID: 🔍

Status:\* Active ▼ 🟢

Debt Recovery Code: ▼ 🇳🇿

Address For Notices:

Electorate: ▼

Region: ▼

---

**Graphs and Gauges**

Charge Consumption

Previous Billing Cycles Historical Daily Average Consumption

Daily Average Consumption Property Transfers


On the **Water Account** screen

Enter the **Property ID**

**Status** is Active

Click **Save** to generate an **Account Number**

### Water Account


Account Number:   Address: 27 Suffolk Street ASHBURTON  
Owners: Dagg Gordon Craig(Owner)  
Mailing Address: 5 Archibald Street TINWALD  
Tenant: No Primary Tenant


---


#### General

Water Account

Property ID:\*  27 Suffolk Street, ASHBURTON

Schedule ID:  

Status:\*   27 Suffolk Street, ASHBURTON

Debt Recovery Code:  

Address For Notices:

Electorate:

Region:


---

#### Graphs and Gauges


Charge Consumption

Previous Billing Cycles Historical Daily Average Consumption

Daily Average Consumption



Property Transfers

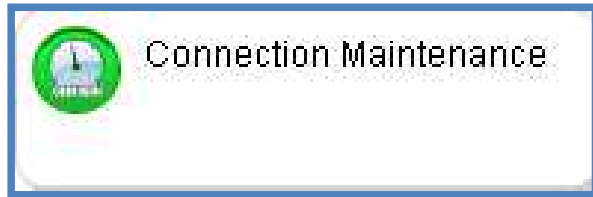


Take a note of the **Account Number** for creating a new meter record

Click on **Close**

Next a new meter record needs to be created

On the Property & Rating workspace, click on **Connection Maintenance**



This takes you to the **Connection** screen

**Connection**

Connection ID: [Autogenerate]

---

**General**

Status:\* [Active]

Account Number:\*

Property ID:\*

Connection Category:\*

Meter ID:\*

Meter Type:\*

Pipe Size (mm):

Date Installed:\* [18/11/2009]

Service Start Date:\* [18/11/2009]

Tariff:\*

---

**Graphs and Gauges**

Charge Consumption

Previous Billing Cycles

Historical Daily Average Consumption

Daily Average Consumption

Property Transfers

Drag a column header here to group by that column


Transfer Date	Transfer Type

Type in the **Account Number**

Click **Retrieve**


This will pull up the **Property ID** number


**Connection**


Connection ID: (Autogenerate) 



---

**General**


Status:\* Active 

Account Number:\* 100788  27 Suffolk Street, ASHBURTON


Property ID:\* 12345  27 Suffolk Street, ASHBURTON


Connection Category:\*  


Meter ID:\*

Meter Type:\*  

Pipe Size (mm):

Date Installed:\* 18/11/2009 

Service Start Date:\* 18/11/2009 

Tariff:\*  

---


**Graphs and Gauges**


Charge Consumption


Previous Billing Cycles  Historical Daily Average Consumption



**Connection Category** defaults to **Quarterly** readings

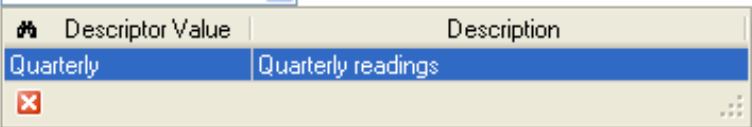
**General**

Status:\* Active 

Account Number:\* 100788  27 Suffolk Street, ASHBURTON

Property ID:\* 12345  27 Suffolk Street, ASHBURTON


Connection Category:\*  


Meter ID:\* 


Descriptor Value	Description
Quarterly	Quarterly readings

Meter Type:\*

Pipe Size (mm):

Date Installed:\* 18/11/2009 

Service Start Date:\* 18/11/2009 

Tariff:\*  

The **Meter ID** is supplied by the contractor

The **Meter Type** is usually 525 – which is a 5 dial meter

**NB - Any variation on this will be advised by the Contractor/ADC Water Department**

Click on **OK**

The screenshot shows a software interface with two main windows. The background window is titled 'Connection' and has a 'Connection ID' field with '(Autogenerate)'. Below this is a 'General' section with various fields: Status (Active), Account Number (100788), Property ID (12345), Connection Category (Quarterly), Meter ID (07M052314), Meter Type (525), Pipe Size (mm), Date Installed (18/11/2009), Service Start Date (18/11/2009), and Tariff. There is also a 'Graphs and Gauges' section with a checkbox for 'Charge Consumption' and a 'Previous Billing Cycles' section.

The foreground window is titled 'Meter Types' and contains a table with the following data:

Meter Type	Description
215	Two Dial
315	Three Dial
4100	Four Dial
415	Four Dial
420	Four Dial
425	Four Dial
440	Four Dial
450	Four Dial
450G	Four Dial
475	Four Dial
5100	Five Dial
515	Five Dial
520	Five Dial
525	Five Dial
532	Five Dial
540	Five Dial
550	Five Dial
575	Five Dial
6100	Six Dial

The row for '525 Five Dial' is highlighted with a red box. At the bottom of the 'Meter Types' window, there are 'OK' and 'Cancel' buttons. A status bar at the bottom of the window shows 'Count: 29'.

Select **Tariff** – this relates to the location of the meter within the District

In this example it is **UrbAsh** – which tell us the meter is in Urban Ashburton

**Connection**

Connection ID: (Autogenerate)

---

**General**

Status:\* Active

Account Number:\* 100788 27 Suffolk Street, ASHBURTON

Property ID:\* 12345 27 Suffolk Street, ASHBURTON

Connection Category:\* Quarterly Quarterly readings

Meter ID:\* 07M052314 07M052314

Meter Type:\* 525 Five Dial

Pipe Size (mm):

Date Installed:\* 18/11/2009

Service Start Date:\* 18/11/2009

Tariff:\*

**Graphs and Gauges**

Charge Consumption

Previous Billing Cycles

Descriptor Value	Description
UrbAsh	UrbAsh
UrbCher	UrbCher
UrbHin	UrbHin
UrbMay	UrbMay
UrbMtSom	UrbMtSom
UrbMvn	UrbMvn
UrbRak	UrbRak

Historical Daily Average

**Actions to Perform**

- Replace Meter
- Replace Capsule
- Remove Connection
- Special Reading
- Read Only Reading

---

- Save and Clear
- Save**
- Job Options

Click on **Save**

This will bring up the **Initial Reading** box

Initial reading will always be zero unless otherwise advised

**Date Installed** is entered as the date the new meter was installed

Click on **OK**

**Initial Reading**

Enter a value for the initial reading

Initial Reading:\*

Date Installed:

**Route**

Select the Route Number you wish to add this Connection to

Route ID:\*

The Connections already on this route are shown below. Enter the sequence number that you require for this connection

Route Sequence Number:\*

**Route Connections**

Search:  [Retrieve](#)

Meter ID	Sequence	Address	Meter Type	Meter Type Description
----------	----------	---------	------------	------------------------

Count: 0

OK Cancel

Click on the Magnifying glass beside the **Route ID** box

Like the tariff, the **Route ID** relates to the area which area of the Ashburton District that the meter is located

Select the area of the meter – in this case it is **1 Ashburton East**

Click **OK**

The screenshot shows a software application window with a blue header bar displaying '10.03.00.005'. Below the header is a navigation bar with icons for 'back', 'home', 'windows', 'close', 'clear', and 'retrieve'. The main content area is divided into several sections: 'Connection' with a search box for 'Connection ID' containing '[Autogenerate]'; 'New Connection Additional Details' with a green checkmark and 'help', 'windows', and 'clear' buttons; 'Initial Reading' with a text input for 'Initial Reading\*' (value: 0) and a date picker for 'Date Installed' (value: 18/11/2009); 'Route' with a dropdown menu and a search box for 'Route ID:\*' (highlighted with a red box); and 'Route Connections' with a search box and a table with columns 'Meter ID', 'Sequence #', and 'Address'. A 'Routes' dialog box is open in the foreground, showing a search box and a list of routes. The first route, '1 Ashburton East', is selected. The dialog box also has 'OK' and 'Cancel' buttons at the bottom.

Route ID	Route Description
1	Ashburton East
2	Ashburton West
3	Tinwald
4	Methven
5	Rakaia
6	Hinds
7	Chertsey
8	Mayfield
9	Mt Somers
9998	Multiple Route Selection Dummy Route
9999	Dummy resequencing route

**Route Sequence**– this information is held in yellow folders which relate to that route – black filing cabinet in the Rates Assistants office held at the Ashburton District Council.

To assist in making the decision find a neighbouring property and use a sequence number which will either be 1 number above or 1 number below depending on the location

This example we will use 3000

Click **OK**

Takes you to the **Connection** screen which has generated a **Connection ID** number

Click **Save**

**Connection**

Connection ID: 925 Address: 27 Suffolk Street ASHBURTON  
Owners: Dagg Gordon Craig(Owner)  
Legal Addr: FLAT 1 DP 41479 WITH UNDIVIDED 1/2 INT IN LOT 1 DP 40679  
Mailing Addr: 5 Archibald Street TINWALD

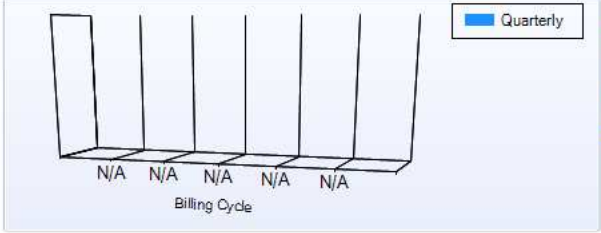
**General**

Status: Active  
Account Number: 100788 27 Suffolk Street, ASHBURTON  
Property ID: 12345 27 Suffolk Street, ASHBURTON  
Connection Category: Quarterly Quarterly readings  
Meter ID: 07M052314 07M052314  
Meter Type: 525 Five Dial  
Pipe Size (mm):  
Date Installed: 18/11/2009  
Service Start Date: 18/11/2009  
Tariff: UrbAsh UrbAsh


**Graphs and Gauges**

Charge Consumption

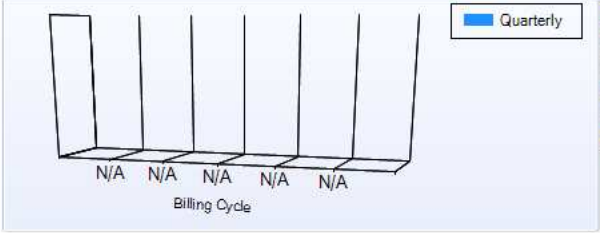
Previous Billing Cycles



Daily Average Consumption



Historical Daily Average Consumption



Property Transfers

Transfer Date	Transfer Type
13/10/2009	Sale

**Connection**

Connection ID: 925 Address: 27 Suffolk Street ASHBURTON  
Owners: Dagg Gordon Craig(Owner)  
Legal Addr: FLAT 1 DP 41479 WITH UNDIVIDED 1/2 INT IN LOT 1 DP 40679  
Mailing Addr: 5 Archibald Street TINWALD

## 4 Splitting a Connection

Go to relevant Water account via the **Connection Enquiry** on the Property & Rating workspace  
Click on **Split to Another Account**

The screenshot shows a web application interface for 'ADC Rates Role - PR10.3 Test direct - 10.03.00.005'. The interface includes a menu bar (File, Edit, View, Tools, Actions, Window, Help) and a toolbar with icons for My Workplaces, Employee Workplace, My Reports and Files, Announcements, Reminders, and Preferences. The main workspace is titled 'Property & Rating' and contains a 'Maintenance' section with a list of actions. The 'Split to Another Account' option is highlighted with a red box. The 'Connection' details for Connection ID 925 are displayed, including address, owners, and general information.

**ADC Rates Role - PR10.3 Test direct - 10.03.00.005**

File Edit View Tools Actions Window Help

My Workplaces Employee Workplace My Reports and Files Announcements Reminders Preferences

New Property & Rating

Maintenance help back home windows close clear retrieve

Drag and Analyse

Actions to Perform

- Replace Meter
- Replace Capsule
- Remove Connection
- Special Reading
- Read Only Reading
- Split to Another Account**
- Save and Clear
- Save
- Job Options

Links to other Functions

Sections to Display

- General
- Graphs and Gauges
- Reading History

My Personal Workflow

Connection

Connection ID: 925

Address: 27 Suffolk Street ASHBURTON  
Owners: Dagg Gordon Craig (DAGG)  
Legal Addr: FLAT 1 DP 41479 WIT  
Mailing Addr: 5 Archibald Street TINK

General

Status: Active

Account Number: 100788 27 Suffolk Street, ASHBURTON

Property ID: 12345 27 Suffolk Street, ASHBURTON

Connection Category: Quarterly Quarterly readings

Meter ID: 07M052314

Meter Type: 525 Five Dial

Pipe Size (mm):

Date Installed: 18/11/2009

Service Start Date: 18/11/2009

Tariff: UrbAsh UrbAsh

This information would have already be predetermined so the Property ID or Account Number would normally be accessible

Select **Tariff** – this relates to the location of the meter within the District

The **Split From Date** is required

**General**

Status:\* Active

Account Number:\* 100788 27 Suffolk Street, ASHBURTON

Property ID:\* 12345 27 Suffolk Street, ASHBURTON

Connection Category:\* Quarterly Quarterly readings

Meter  Split Connection

Meter

Property ID:\* 3000 46 Bridge Street, ASHBURTON

Account Number:\* 3000 46 Bridge Street, ASHBURTON

Tariff:\* UrbAsh UrbAsh

Split From Date: 18/11/2009

Transfer readings with a Reading Date >= the Split Date. Leave date blank to transfer ALL readings.

OK Cancel

Click **OK**

A success message will appear at the bottom of the screen

Historical Daily Average Consumption

Quarterly

Quarterly

N/A N/A N/A N/A N/A

Billing Cycle

Property Transfers

Drag a column header here to group by

Transfer Date	Transfer Type
13/10/2009	Sale

Split Connection Process [227042] succeeded

Click on **Retrieve**

This will change the Status from **Active** to **Split Off**

**Connection**

Connection ID: 925 Address: 27 Suffolk Street ASHBURTON  
Owners: Dagg Gordon Craig(Owner)  
Legal Addr: FLAT 1 DP 41479 WITH UNDIVIDED 1/2 INT IN LOT 1 DP 40679  
Mailing Addr: 5 Archibald Street TINWALD

**General**

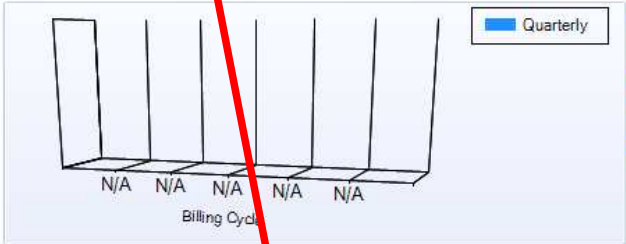
Status:\* Split Off

Account Number:\* 100788 27 Suffolk Street, ASHBURTON  
Property ID:\* 12345 27 Suffolk Street, ASHBURTON  
Connection Category:\* Quarterly Quarterly readings  
Meter ID:\* 07M052314  
Meter Type:\* 525 Five Dial  
Pipe Size (mm):  
Date Installed:\* 8/11/2009  
Service Start Date:\* 18/11/2009  
Tariff:\* UrbAsh UrbAsh

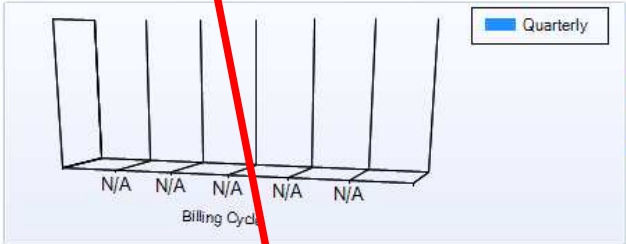
**Graphs and Gauges**

Charge Consumption

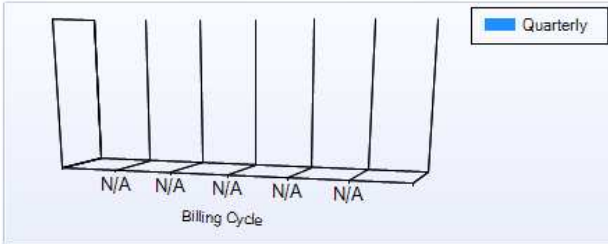
Previous Billing Cycles



Daily Average Consumption



Historical Daily Average Consumption



Property Transfers


**General**

Status:\* Split Off

Account Number:\* 100788 27 Suffolk Street, ASHBURTON  
Property ID:\* 12345 27 Suffolk Street, ASHBURTON  
Connection Category:\* Quarterly Quarterly readings  
Meter ID:\* 07M052314  
Meter Type:\* 525 Five Dial  
Pipe Size (mm):  
Date Installed:\* 18/11/2009  
Service Start Date:\* 18/11/2009  
Tariff:\* UrbAsh UrbAsh

The description of the split is populated automatically under the **Notes** section

**Connection**

Connection ID:  


Address: 27 Suffolk Street ASHBURTON  
Owners: Dagg Gordon Craig(Owner)  
Legal Addr: FLAT 1 DP 41479 WITH UNDIVIDED 1/2 INT IN LOT 1 DP 40679  
Mailing Addr: 5 Archibald Street TINWALD

**Notes**



Split from Property 12345 to Property 3000 Meter ID 07M052314 Date 18.11.09

**Notes**

Split from Property 12345 to Property 3000 Meter ID 07M052314 Date 18.11.09



## 5 Document Sign Off

PRINT NAME	DOCUMENT COMPLETE (Yes/No)	SIGNATURE (ELECTRONIC)	Version	DATE
Brian Kerr	Yes		2.0	27/11/2009
Samantha Thompson	Yes		2.0	27/11/2009
			3.0	15/02/2010
			3.0	15/02/2010