



ADEQ

Arkansas Department of Environmental Quality

Integrated Information Systems

**Permit Data System
(PDS)**

User Guide

–DRAFT–

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Chapter 1: INTRODUCTION

The *PDS User Guide* is intended for all PDS users, but not all information in this guide is applicable to all users. Where necessary, the role of the person performing the described function is indicated (e.g., AFIN Data Manager, Invoice Generator, Invoice Payer, Data Manager).

For purposes of version control, the document revision date is indicated on the inside cover of this book (page ii).

Styles

Throughout this guide, character styles are used to indicate the use of PDS elements as buttons, menus, and screens. The following table provides a description of each:

Element	Style	Description
Button	Arial Shaded Box	Indicates any button available in a PDS window.
Field Name	Arial Bold	Indicates any field on a PDS window.
Keystroke	{Arial Brackets}	Indicates keys used to perform PDS functionality.
Hyperlink	Arial Blue Underline	Indicates a link to a document or Web page.
Pull-Down Menu	Arial Bold	Indicates PDS pull-down menu options.
Window or Tab	ARIAL SMALL CAPS	INDICATES ANY PDS WINDOW, SCREEN, GRID, OR POP-UP BOX.

Table 1: Style Guide

Accessing PDS

Complete the following steps to open PDS:

1. Double-click the PDS shortcut on your desktop. You are automatically logged in with the permissions assigned to your computer user ID.
2. Select the **Continue** button or type {Alt + C} to continue to the main menu.

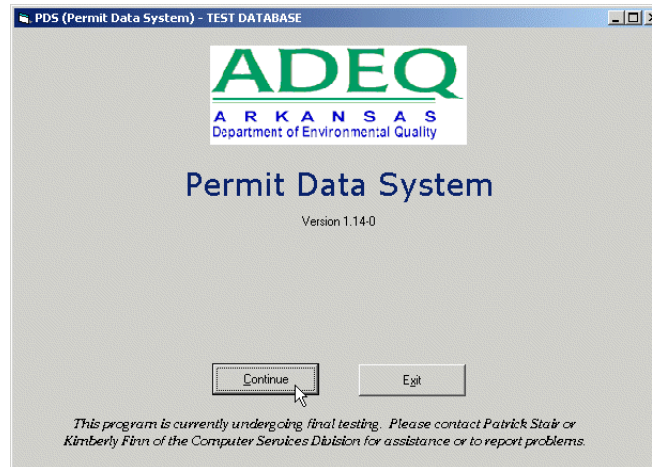


Figure 1: PDS Splash Screen

Exiting PDS

Now that you're in PDS, you may find yourself navigating several screens deep to get where you want to go (Figure 2). To get back to where you started, you can close each window using the **X** at the top right of any window or by selecting the **E**xit button. To completely exit PDS, go to the **F**ile menu and select **S**hut Down this PDS Session.

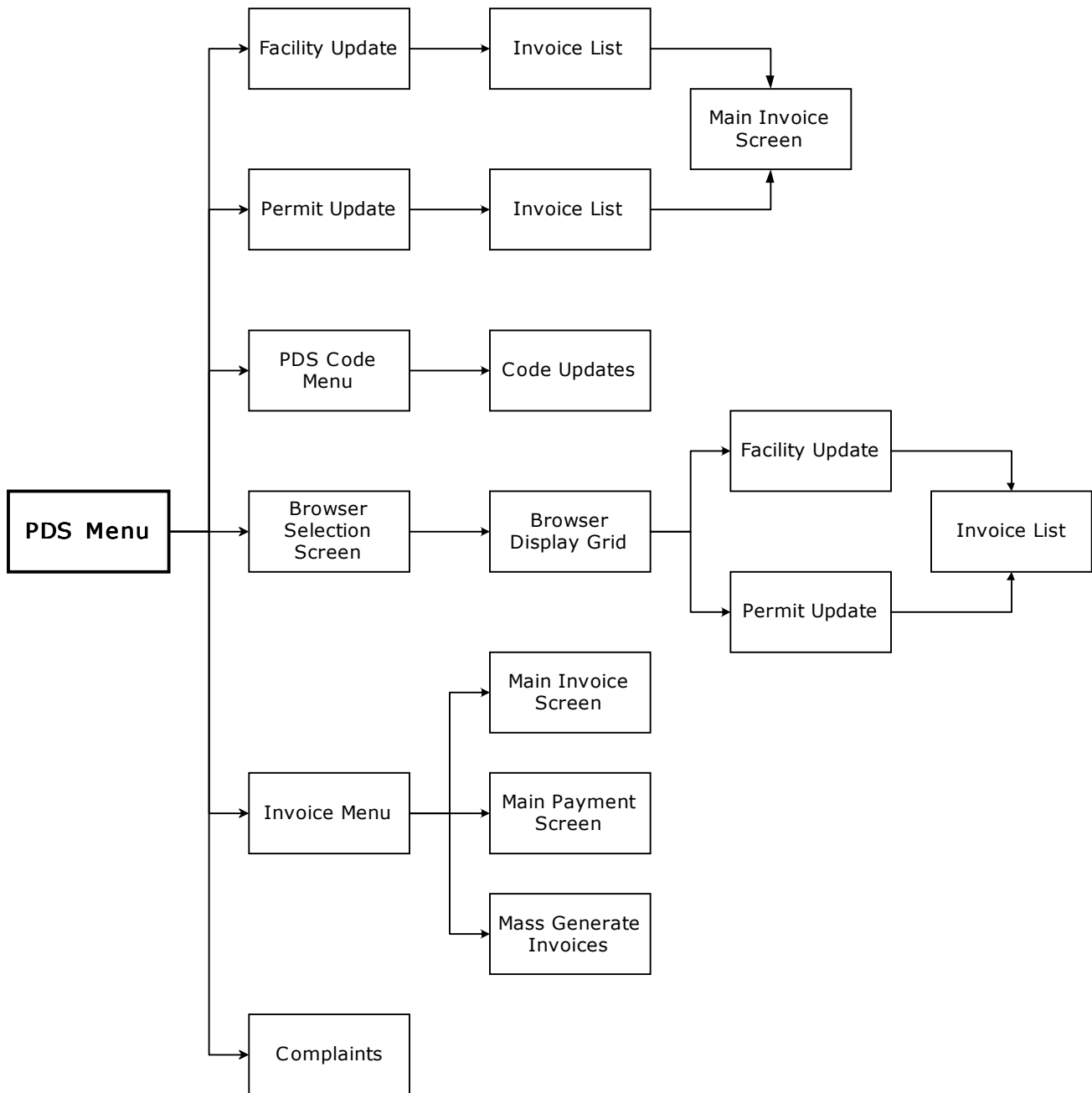


Figure 2: PDS Functionality Overview

PDS Roles and Permissions

As shown in the figure above, PDS has several different types of functionality. Most users, however, will only access the information provided in PDS and will not have permissions to add or modify records.

There are five primary roles within PDS, each with specific permissions (*Table 2*). These permissions are related to your computer login ID. A single individual may have more than one role in PDS, with permissions specific to those roles. At a minimum, all users have at least read access to all PDS records.



Warning! Anyone who uses your computer can log into PDS with your permissions. If you have the permissions to modify PDS records, consider locking your computer when you leave your desk.

The Intranet version of PDS has a single permission level that provides read-only access to all PDS records for in-house users. The Internet version of PDS has a single permission level that provides read-only access to certain PDS data for the general public (see *Chapter 14: PDS on the Web*).

Role	Description
AFIN Data Manager	This role is typically restricted to the Fiscal Division. The AFIN Data Manager is the only user with permissions to create and edit facilities in PDS. This individual determines the AFIN number for a given facility by using the appropriate county code and the next consecutive number in the list of facilities (it isn't arbitrary).
Permit Data Manager	This role is filled by one or more individuals in each division or section who are responsible for creating permit records through PDS. Permit Data Manager permissions are specific to a single division or section. For example, an Air Permit Data Manager can only create or modify Air permits.
Invoice Generator	These individuals are the only users with permissions to create or modify invoices. Invoice Generator permissions are specific to particular types of invoices.
Invoice Payer	This role is restricted to the Fiscal Division. Invoice Payers are the only users who can enter invoice payments through PDS.
General User	This role applies to all users, and provides read-only access to all PDS records. Some General Users may have additional roles for their division, such as Permit Data Manager.

Table 2: PDS Roles and Permissions

Screen Components

Each PDS screen contains buttons and pull-down menu options. Some of these functions can also be initiated using keyboard shortcuts.

Pull-Down Menu Options

Certain functionality is provided throughout PDS using pull-down menu options. The three standard pull-down menus are described in the following table. Additional pull-down menu options are described in applicable chapters.

Menu	Description
<u>F</u>ile	The main File menu options at this time are Exit , to exit the current screen, and Shut Down This PDS Session , which can be used from any screen to close PDS. These two options are always available. Some screens also include reporting options under the File menu.
<u>A</u>udit	The Audit menu appears on all data entry screens, and provides information for the current record or invoice (the one in view when you select Audit). For more information, see <i>Chapter 12: Audit Data</i> .
<u>H</u>elp	The Help menu provides the current version number for PDS and a link to send feedback to the PDS Administrator via email.

Table 3: Menu Options

Buttons

There are several standard types of buttons on PDS screens, as well as some special functions (these will be discussed in the applicable chapters). The standard buttons are described in the following table.

Some buttons may be grayed out (disabled). This is either because your permission level does not allow use of the button, or because you must create a record before the button can be used, or for other reasons where the button function is not applicable or logical at that time. For example, if your permission level is General User (read-only), most PDS functionality (creating and modifying records) will be disabled.

Function	Description
Add	Add records to the PDS database (create a new record).
Update	Modify records already existing in the PDS database.
Delete	Remove records from the PDS database.
Cancel or Exit	Cancel the current screen and return to the previous screen. If you are in a data entry screen and have entered data, PDS will provide a prompt to save your changes. This function can be initiated using either the Exit button, by clicking the X in the upper right corner of the window, or through the File menu. If using the X button, a prompt will verify you wish to exit the open window.

Table 4: PDS Buttons



Other than on the **PDS MENU**, the exit functions described above do not close PDS. To completely exit PDS from any screen, go to the **File** menu and select **Shut Down This PDS Session**.

Keyboard Shortcuts

To minimize the ergonomically unfriendly practice of switching repeatedly from keyboard to mouse, most PDS screens allows users to tab between fields and either use the {Alt} functions or the {Tab} and {Enter} keys to activate button functionality. Not all buttons have {Alt} functionality, but most common actions are available. For example, to exit a screen you can type {Alt + X} on your keyboard. To access code lists, tab to the appropriate field and use the {↓} key.

The pull-down menus in PDS also have keyboard shortcuts, but users with Microsoft Windows 2000 will notice the underlines are not readily visible. With this version of Windows, you must press the {Alt} key to see the underlined letters indicating the appropriate keyboard shortcut. Press {Alt} again to hide the underlines.

Notification Windows

Some actions are not allowed in PDS, and others are not advisable. For example, if you attempt to delete a posted payment, you will receive an error notification and PDS will not allow you to continue with that action. On the other hand, you can enter a city such as “Tulsa” even though it is not in the list of city codes. PDS returns a warning notification in these instances to prevent users from entering variations of known Arkansas cities. You can proceed with this action to accommodate out-of-state customers (*Figure 3*).

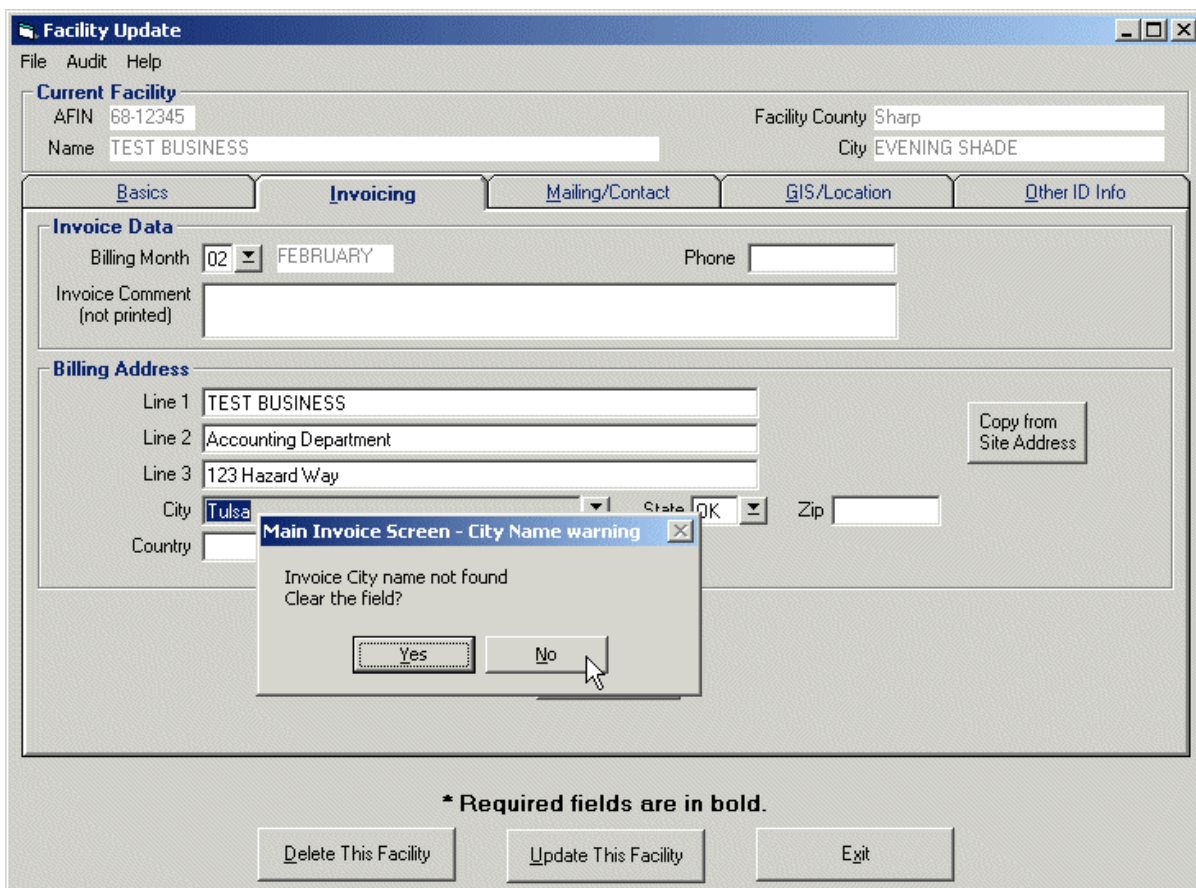


Figure 3: Notification Example

PDS Overview

The PDS interface was developed to provide cross-functionality throughout the program. This means that it's easy to locate facilities even if you don't have the AFIN or are unsure of how the facility or city is spelled. Once you locate a facility, related permits and invoices are readily available for updating, viewing, and printing. Whether you are responsible for entering permits, or just need a report of all permits for a facility or city, PDS makes it easy to accomplish your tasks.

From the main menu, you can perform any of the following functions:

Enter an AFIN and select the **Edit** button to view a facility (the AFIN Data Manager can also add or modify).

Enter a permit number and select the **Edit** button to view a permit (Permit Data Managers can also add or modify).

Select the **Browse** button to locate records.

Select the **Invoice Menu** button to view invoices (Invoice Generators can also add or modify invoices, and Invoice Payers can also add or modify payments).

In the future, Complaints functionality will also be added.

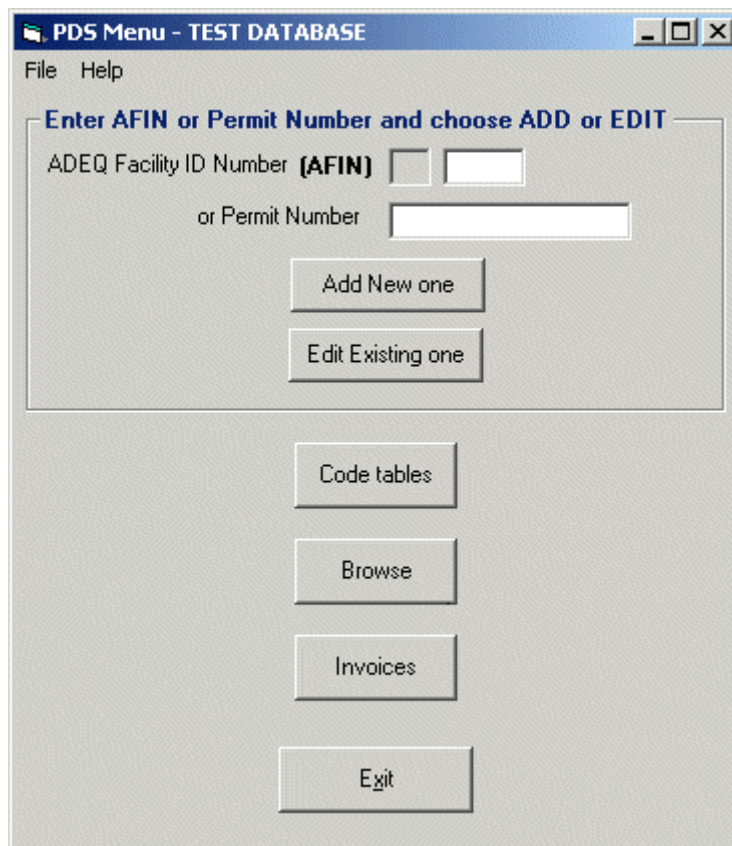


Figure 4: Main Menu Functionality

Using this guide, you can follow the procedures in each chapter to perform functions in PDS, or you can turn to Appendix A and review the information available in each screen. The step-by-step procedures are designed to provide the necessary, but minimal, information required to perform each task. Appendix A provides greater detail about individual fields.

PDS Data Relationships

Using AFINs, PDS tracks many of the monitoring tasks performed by ADEQ personnel. The following diagram describes these activities:

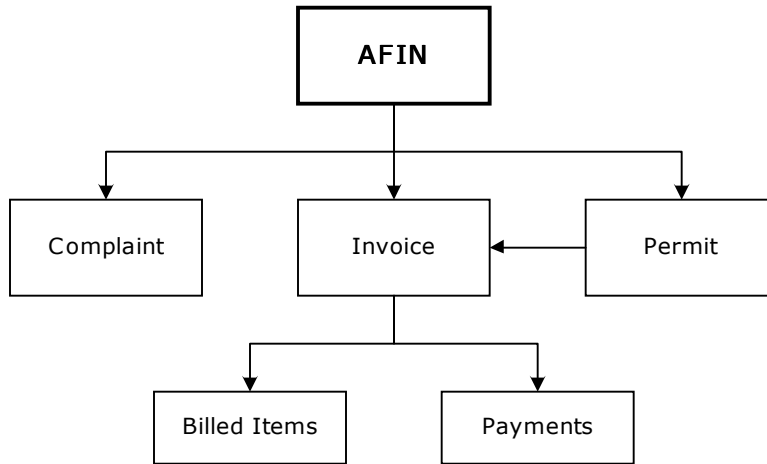


Figure 5: PDS Data Relationships

AFINs

Before a permit can be assigned to a facility through PDS, the facility must be assigned a location code called an ADEQ Facility ID Number, or AFIN (see *Chapter 8: AFIN Assignments*). This code is added to PDS by the AFIN Data Manager, and is referenced by all PDS records for all divisions with a few specific exceptions.

Permits

Once the facility has an AFIN, the PDS users assigned to manage permit data for each division can create permits for that facility in the PDS system (see *Chapter 4: Permits*).

Invoices

Each month the Fiscal division generates mass invoices for certain types of invoices. The data managers for each division can request other invoices on a case-by-case basis and sometimes generate invoices themselves, depending on the type of invoice. Only a user who is assigned the Invoice Generator role can create and modify invoices (see *Chapter 5: Invoices*).

Billed Invoice Items

For certain permits, items are added automatically as part of the mass invoice generation process. In other cases, invoice items are added manually (see *Chapter 6: Billed Items*). Once the invoice is generated, it is automatically printed to paper for billing. A PDF copy is also retained for future reference. At this point, the invoice cannot be reprinted except from the PDF copy. Items can be added or modified after the invoice is issued (e.g., late charges, incorrect items), but the invoice is not reissued to the customer.



Due to accounting and database controls, invoice items cannot be deleted. If a data manager finds an incorrect item, it can only be modified or voided.

Payments

When a customer returns a payment for a particular invoice, a member of the Fiscal Division with Invoice Payer permissions enters the payment against the invoice, either specifically to individual items, or as payment in full for all items. Payments can only be applied against active items within active invoices. For more information about payments, see *Chapter 7: Invoice Payments*.

Audit Information

Auditable events are tracked throughout PDS and can be viewed from applicable screens (see *Chapter 12: Audit Data*). Some audit records provide only the user and modification date, while others note actual changes.