Core Interface User Guide

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Pathway 3.09 (Thick Client Version)

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Overview

The Core Interface Module was designed with the objective of providing a way of interfacing Pathway with other External Products.

The following Topics are covered in this Userguide:

SQL Processing
Call Manager Interface
Interfacing

SQL Processing

This Section describes the establishment of SQL Scripts that can be defined by a User or supplied Pre-defined Scripts that are able to be executed interactively or as a batch process.

The following topics are covered in this section:

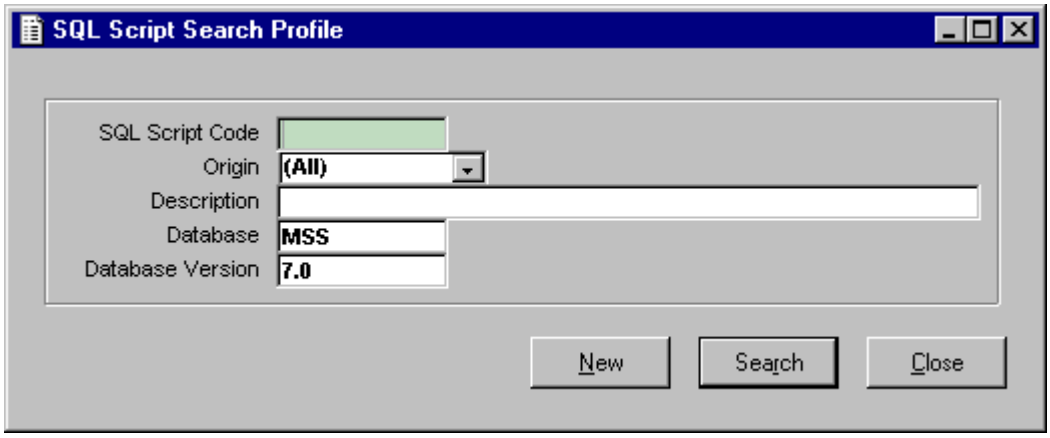
SQL Script Search Profile
SQL Script Processing

SQL Script Search Profile

The SQL Script Search Profile menu allows the creation of User Defined SQL Scripts which can then be processed as a Batch Job. Additionally Pre-Defined SQL Scripts can be supplied for use.

SQL Script Search Profile

This form enables the searching of existing pre-defined or user defined SQL Scripts or the creation of new SQL Scripts.



SQL Script Search Profile Form

SQL Script Code
If the SQL Script Code is known then it can be entered into this field and the Search Button selected to display the Script. Wildcard searching is available in this field. This field can be left blank

Origin
The Origin field defaults to (All). However if searching is required for only those Scripts which are either Pre-Defined or User Defined then the field can be changed using the dropdown.
Options available are:-

- Pre-Defined
- User Defined
- (All)

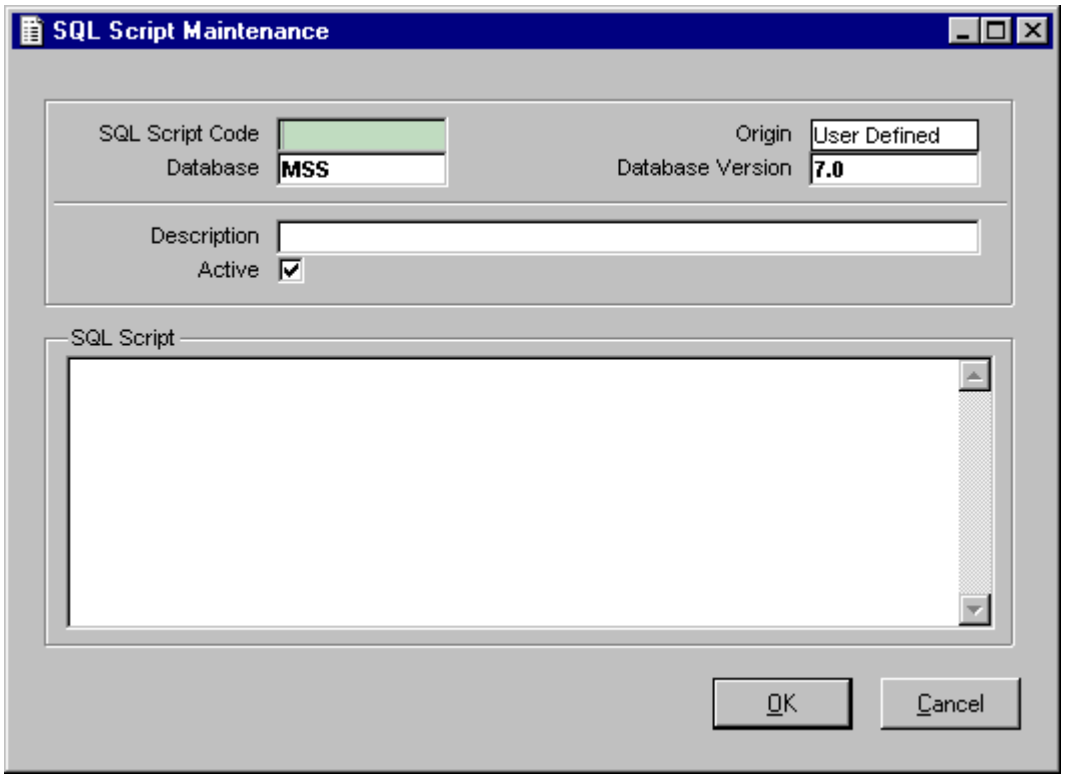
Description
It is possible to search for a Script by its Description or part thereof. Wildcard searching is available in this field. This field can be left blank.

Database
The Database will default to the Database being used by Pathway. For example this could be MSS (being Microsoft SQL Server) or ORA (being Oracle). Selection of the appropriate Database will display only those Scripts which have been defined for that Database.

Database Version
The Database Version will default to the Version being used by Pathway.

SQL Script Maintenance Form

The SQL Script Maintenance form enables the maintenance of existing SQL Scripts or the creation of new SQL Scripts.



SQL Script Maintenance Form

SQL Script Code

If a new SQL Script is being defined then an appropriate Code for the Script will need to be entered. If an existing Script had been selected then the SQL Script Code will default to that which was entered when the Script was originally defined. This is a mandatory field however it can be maintained when modifying an existing Script.

Origin

The Origin will either be User Defined or Pre-Defined depending on the Script that has been selected or is being created. When a new Script is defined the Origin will automatically be set to User Defined. If a Script that has been supplied as part of Pathway is selected then the Origin will be Pre-Defined. This field is non-maintainable.

Database

The Database value will default to the Database being used by Pathway. This field can be maintained when viewing a User Defined Script. However it is recommended that the Database remain that which Pathway is running on. When viewing a Pre-Defined SQL Script this field is non-maintainable. This is a mandatory field.

Database Version

The Database Version will default to the version being used by Pathway when the User Defined Script is being entered. This field can be maintained when viewing a User Defined Script. When viewing a Pre-Defined SQL Script this field is non-maintainable. This is a mandatory field.

Description

The Description field is used to give a brief description of what the SQL Script is doing. This field is maintainable for both Pre-Defined and User Defined Scripts. The Description field is a mandatory field.

Active

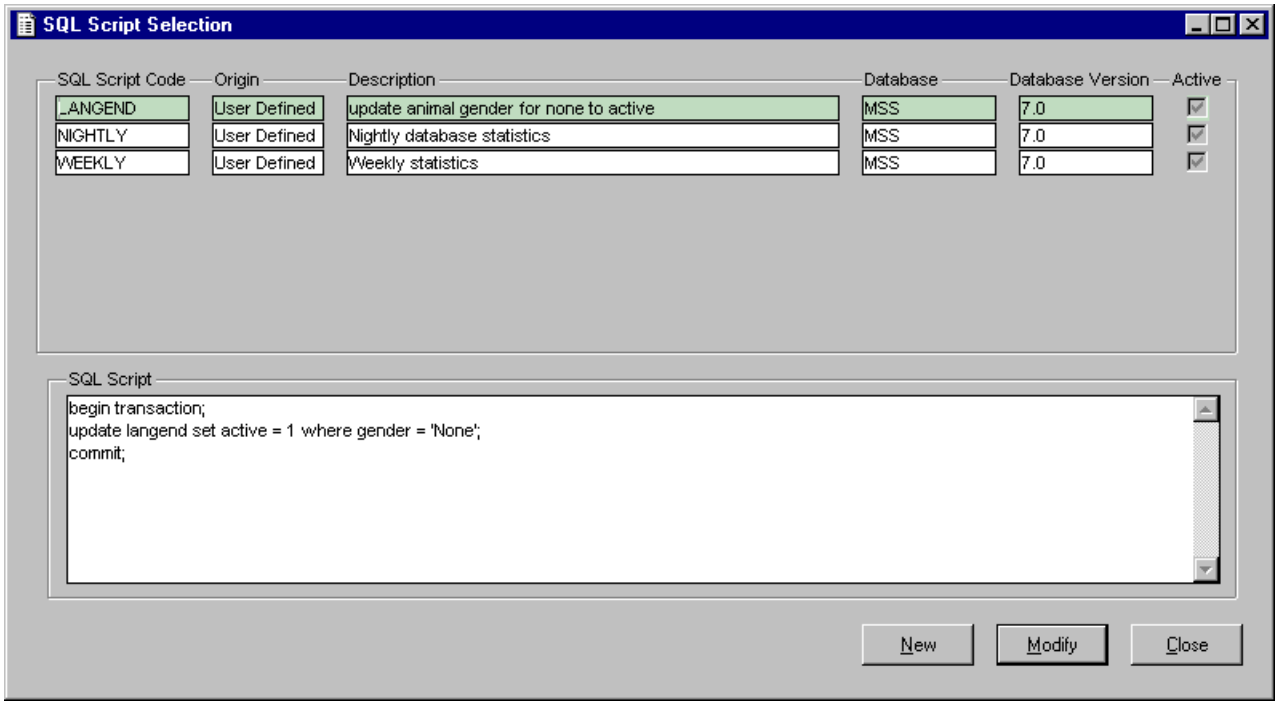
The Active flag controls whether the SQL Script is available for selection in the SQL Script Processing Menu. This field is maintainable in both User and Pre-Defined SQL Scripts. All Pre-Defined Scripts are initially issued with the Active flag set off.

SQL Script

The SQL Script area contains the actual SQL Script that can be executed. This field is non-maintainable if viewing a Pre-Defined Script, otherwise it can be used to modify a User Defined Script or enter in a new Script.

SQL Script Selection

The SQL Script Selection form enables the selection of an existing SQL Script or the creation of a new SQL Script.



SQL Script Selection Form

SQL Script Code
The SQL Script Code contains the Code associated with an SQL Script. This field is display only.

Origin
The Origin of the SQL Script is shown in this field. This will either be User Defined or Pre-Defined. This field is display only.

Description
The Description of the SQL Script is displayed in this field. This field is display only.

Database
The Database field displays the Database that the SQL Script has been written for. For example MSS or ORA. This field is display only.

Database Version
The value in the Database Version reflects that version of the Database at the time the SQL Script was written. This field is display only.

Active
The Active field shows whether the SQL Script is available for use. This field is display only.

SQL Script

The SQL Script field shows the Script associated to the SQL Script Code currently focused on. The information in this field will change whenever the focus is moved from one SQL Script Code to the next. This field is display only.

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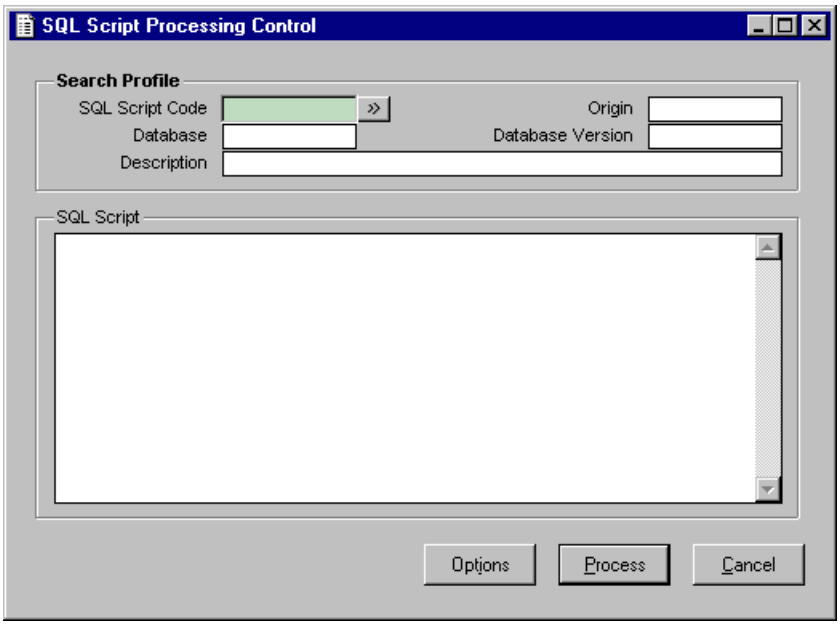
SQL Script Processing

SQL Script Processing Control



SQL Script Processing Control Form

This form enables either Pre-defined or User Defined SQL Scripts to be processed using the various processing options available.

SQL Script Code
Enter in the SQL Script Code that is required to be processed. If the SQL Script Code is not known then the Pop Up can be used to display a list of those SQL Scripts that are Active and available for the Database that Pathway is running on. This is a mandatory field.

Origin
Once the SQL Script has been entered the Origin will default to that of the SQL Script selected. This will either be User Defined or Pre-Defined. This field is display only.

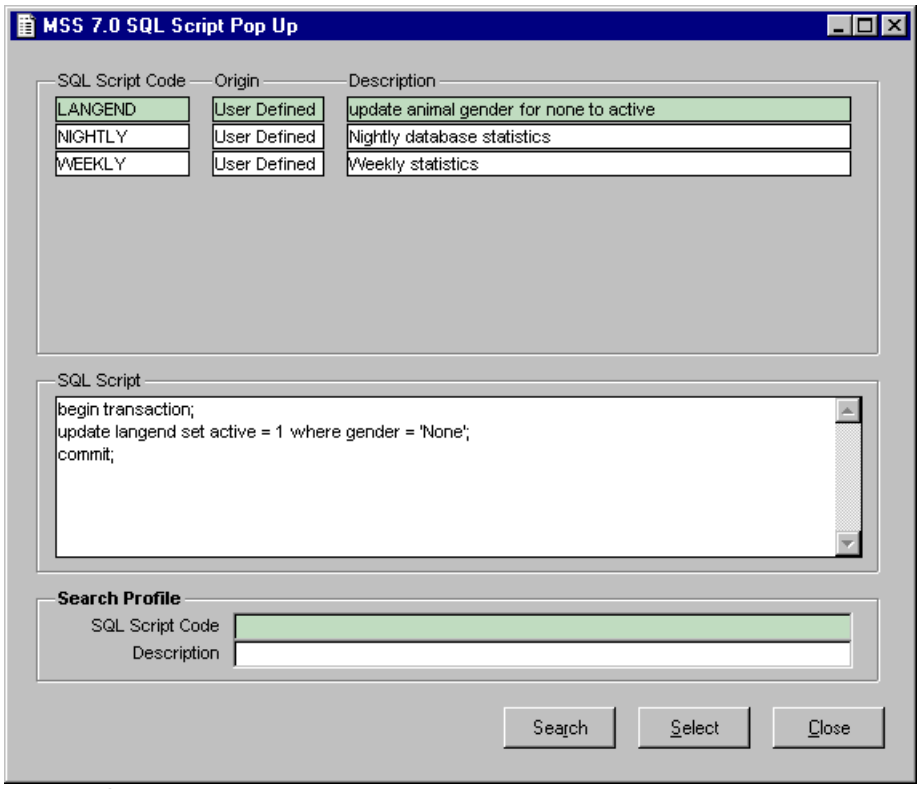
Database
Once the SQL Script has been entered the Database will default to that of the SQL Script selected. For example ORA or MSS. This field is display only.

Database Version
Once the SQL Script has been entered the Database Version will default to that of the SQL Script selected. This field is display only.

Description
The Description of the selected SQL Script is displayed in this field. This field is display only.

SQL Script
The SQL Script for the selected SQL Script Code is displayed in this field. This field is non-maintainable.

SQL Script Pop Up



SQL Script Pop Up Form

The SQL Script Pop Up form enables the selection of an existing SQL Script to enable it to be processed. Only those Scripts that are Active and for the Database that Pathway is running are displayed for selection. To select the script, highlight the required script record and click on select.

SQL Script
The SQL Script field shows the Script associated to the SQL Script Code currently focused on. The information in this field will change whenever the focus is moved from one SQL Script Code to the next. This field is display only.

Call Manager Interface

The following topics are covered in this section:

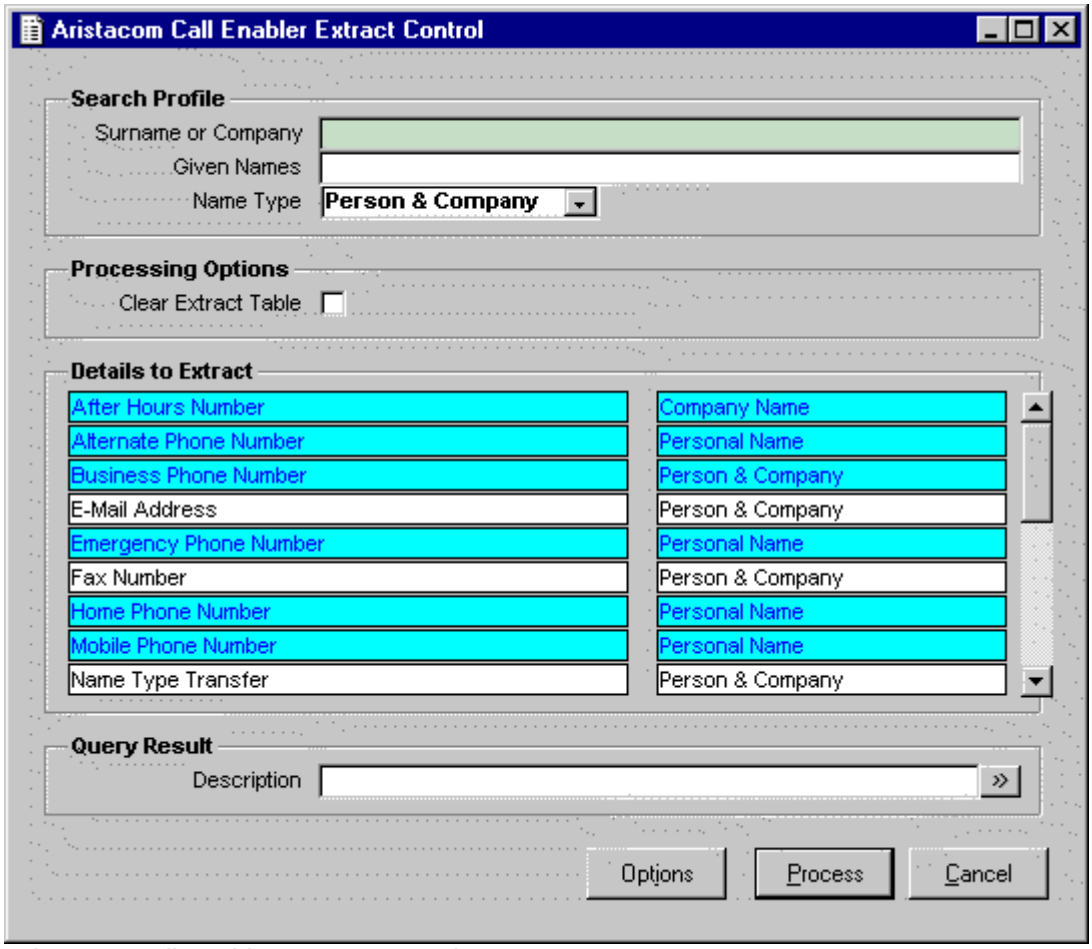
Aristacom Call Enabler
DynaRep Call Manager

Aristacom Call Enabler

Aristacom Call Enabler Extract Control

This form displays when the Call Identifier Name Extraction option is selected from the Customer Service Batch Functions Menu.

This option must be run to initially populate the extract table (CIFARIS) which the Call Manager uses to lookup incoming phone numbers. The form allows for the selection of multiple Communication Types that will be used to extract the associated names. It is also very important that a "System Default" batch Option be logged for this option. Once this has been done the Name and Address Maintenance modules will keep this extract table up to date in 'real time', thereby ensuring that the phone number lookup will always be up to date.



Aristacom Call Enabler Extract Control Form

Surname or Company
This field allows entry of a Surname or Company name over which to create the extract table. To include all names, then this field should be left blank.

Given Names
This field allows entry of a Given Name/s over which to create the extract table. To include all names, then this field should be left blank.

Name Type
Make a selection from the dropdown list. To include all Name Types, select Person and Company. The available options are as follows:

- Company Name
- Personal Name
- Person and Company

Clear Extract Table
Check this box on if you wish to clear the extract table before performing the extract.

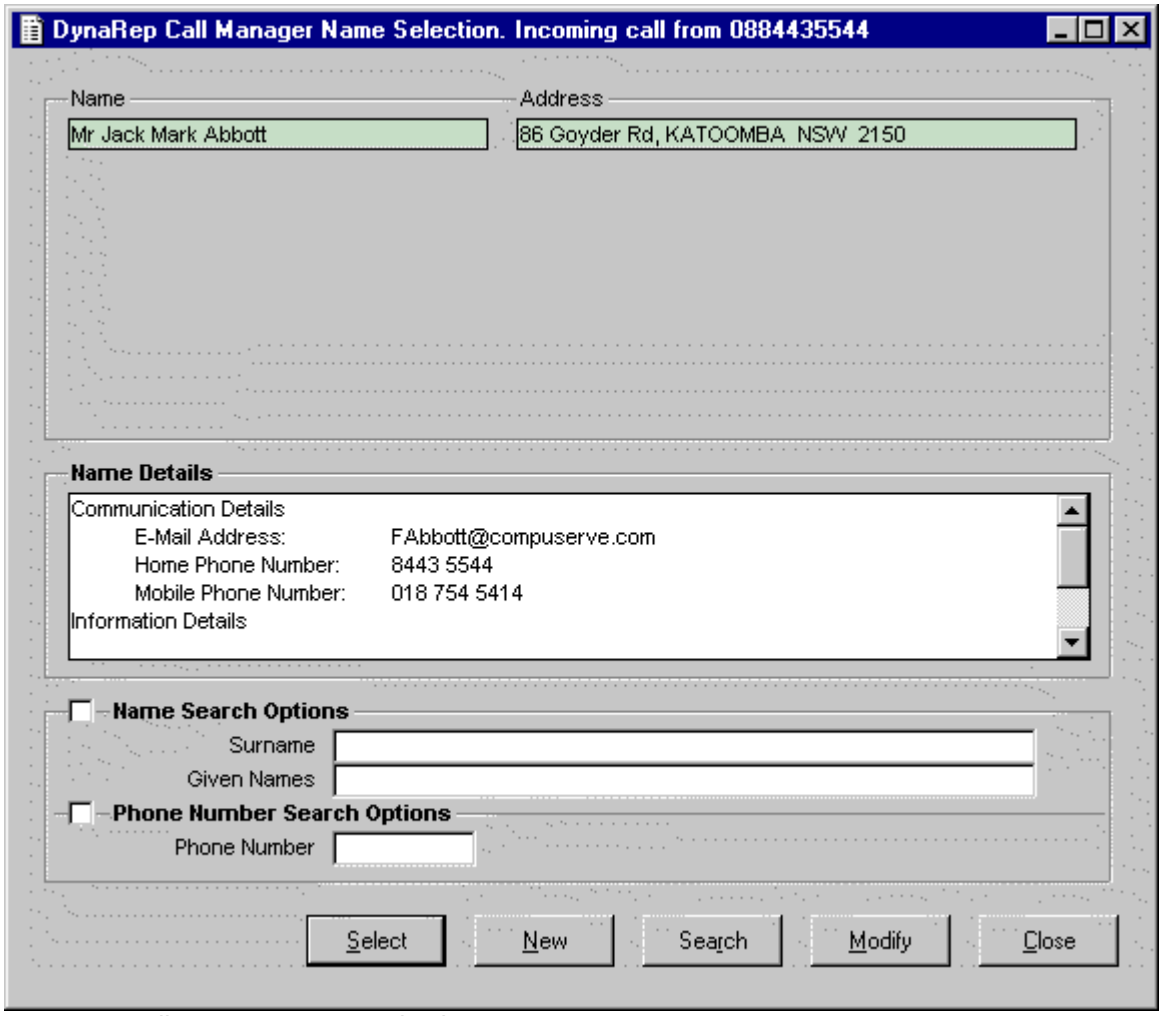
Details to Extract
These fields display the available Communication Type details. Highlight the details you wish to extract. This will usually be any Telephone Number details, e.g. Home Phone Number, Business Phone Number etc. Multi-selection is available by using the SHIFT or CONTROL keys while making the selections.

Query Result Description
A Query Result may be used to perform the extract. The Query must be set up initially within the Query module. If a Query is used then other search profiles will not be used.

DynaRep Call Manager

DynaRep Call Manager Name Selection

The DynaRep Call Manager Name Selection form will display once a phone call is received. If the phone number of the incoming call finds a match in the Extract file, it will display a name/list of names on this form. If no match is found, then a blank form will display, allowing the user to conduct a manual search. The user may then select a name from the list to include in the Customer Request.



DynaRep Call Manager Name Selection Form

Name and Address

These fields contain Name and Address details for the Communication Type details (phone numbers) matching the incoming phone number.

Name Details

This summary box contains further details relating to the name which has focus.

Name Search Options

A Surname and/or Given Name may be entered in these fields on which to conduct a search.

Phone Number Search Options

A Phone Number may be entered in this field on which to conduct a search.

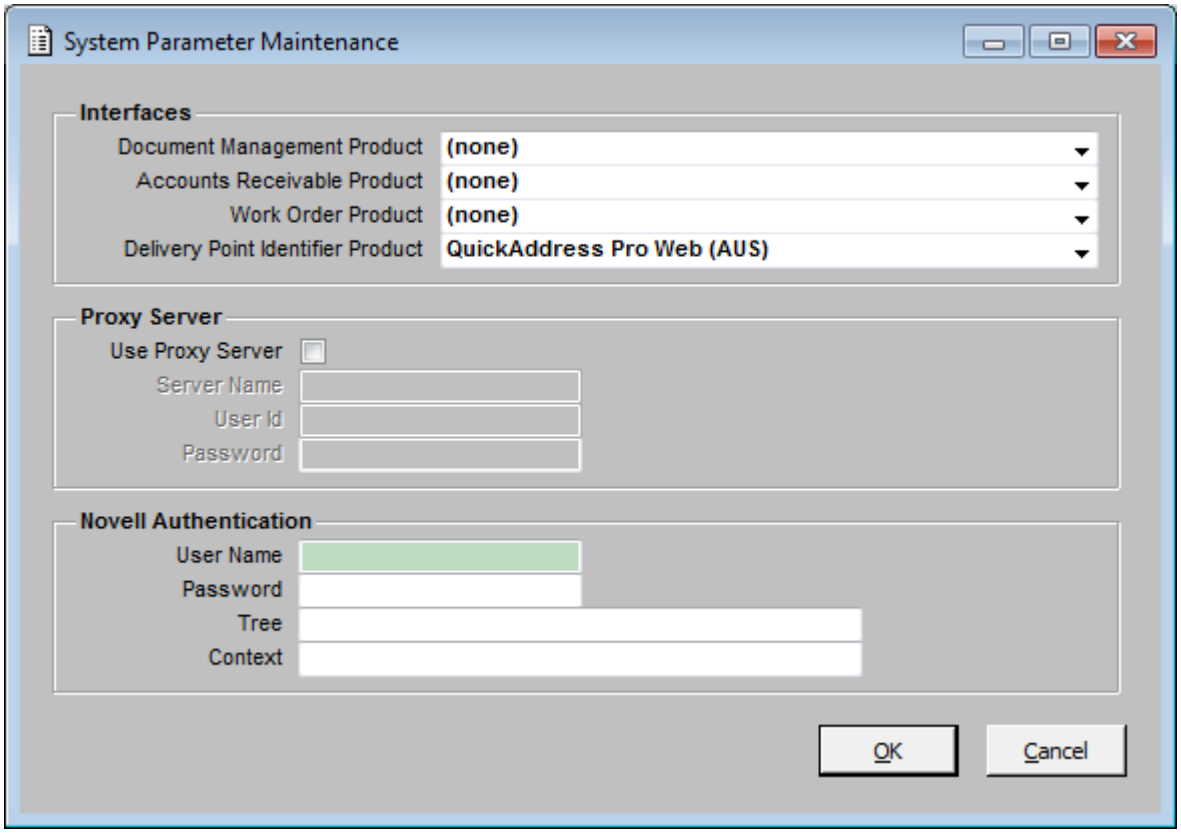
Interfacing

The following topics are covered in this section:

System Parameter Maintenance
External SQL Lookup Maintenance
Document Management Product Maintenance
Pathway Parameter Setup – TRIM
Document Management User Maintenance
External Accounts Receivable Product Maintenance
Financial Systems Interface Parameters

System Parameter Maintenance

System Parameter Maintenance



System Parameter Maintenance Form

Document Management Product
Select the required Document Management Product from the Drop down list available. The list of products available is maintained by INFOR.

Where an interface is not required the parameter may be left at (none).

External Accounts Receivable Product
Select the required Accounts Receivable Product from the Drop down list available. The list of products available is maintained by INFOR.

Where an interface is not required the parameter may be left at (none).

Work Order Product
Select the required Work Order Product from the Drop down list available. The list of products available is maintained by INFOR.

Where an interface is not required the parameter may be left at (none).

Delivery Point Identifier Product
Select the required DPID production from the Drop Down list available. The list of product available is maintained by INFOR.

Where an interface is not required the parameter may be left as (none).

Proxy Server
A Proxy Server area frame has been added with Use Proxy Server, Server Name, User ID and Password fields. Hidden field 'Confirm Password' appears when Password field is modified. Where required the Proxy Server, User and Password information can be entered. When the Proxy Password is entered the Password is also required to be re-entered into the Confirm Proxy Password field. These fields can be left blank if not required.

Novell Authentication
Specify connection details for a Novell network. These details will be used to log on to Novell and so guarantee that the Pathway smart client can access files and files located on a Novell file server. Without these details the Pathway smart client relies on Novell's automatic authentication of the Windows user. These details are not used by the thick client.

For example,

User Name: Pathway
Password: mypassword123
Tree: MYCOUNCIL
Context: MySubContext.MyCouncil

To prevent the Pathway smart client from making a login attempt clear the user name field.

The tree and context may not be necessary in some Novell networks. They are used to "set the context" in which the login will be performed.

In technical terms the user name, password, tree and context are used as follows to perform a login inside each userver.exe process that runs on the Pathway application server:

```
NWDSSetContext(hContext, DCK_TREE_NAME, "MYCOUNCIL");
NWDSSetContext(hContext, DCK_NAME_CONTEXT, "MySubContext.MyCouncil");
NWDSLogin(hContext, 0, "Pathway", "mypassword123", 0);
```

After the login to Novell no further reference is made to the user name, password, tree or context in the userver.exe process. All subsequent file and folder access is performed assuming that this login was successful.

If these details are not specified and files are located on a Novell file server then Pathway will simply rely on Novell to automatically authenticate the Windows user (that is, whichever Windows user the userver.exe process runs as).

If the userver.exe process runs as LocalSystem then Novell ZENworks must be installed on the Pathway application server. And a Workstation Object must be created in Novell for the Pathway application server. This Workstation Object can then be set as the Trustee on files and folders that the Pathway application server needs to access.

More information about installing ZENworks can be found in the appendices of the Pathway Upgrade Instructions document, as found on any Pathway upgrade DVD.

Asset Management Interfacing

Confirm Asset Management Interface Installation Guide

Overview
The Pathway to Confirm Interface will allow council to create a Confirm Enquiry record from a Pathway Customer Service Request non-interactively, via the use of the Confirm AM CRM Connector XML Schema (which uses Objects/Methods to pass data to Confirm). This returns an immediate response of the Enquiry Number created, which is stored in Pathway in a Work Order database table associated to the Customer Service Request.

The creation of a Request is managed by the Work Order Parameter on the Request Type and is initiated via the 'OK' button on a new Request creation or via the Work Order Create option in the Associated menu.

Updates from Confirm update the Pathway Request Status and optionally create additional Request Notes, via an 'asynchronous job' that is scheduled regularly to initiate a COM API call to the relevant Confirm Method to request Confirm Status/Notes updates since the last request (previous day etc).

In addition, the Confirm Request will be updated, at any time an additional Note is added on the Pathway Request, via Pathway Request Maintenance. The process to achieve this within Confirm, requires an Update of both the Status and the Notes, which infers that the Status in Confirm would in fact not change, but would allow another Status Log Transaction to be created with the newly added Note from Pathway.

The other requirement as part of this interface is to manage the Site Code that is relative to Streets/Suburbs and Council owned Properties. These Site Codes may cover more than one Street/Suburb or many Site Codes may be related to one Street/Suburb. The final identification of a specific Site Code may sometimes only be identified by using the GIS and Engineering layer.

Rules:
A Customer Request record can be linked to only one Confirm Enquiry record.
A Confirm Enquiry record may only be linked to one Customer Request record.

Terminology
New Enquiry – Refers to the Confirm creation of a new Enquiry record

Request – Refers to the Pathway Customer Request record

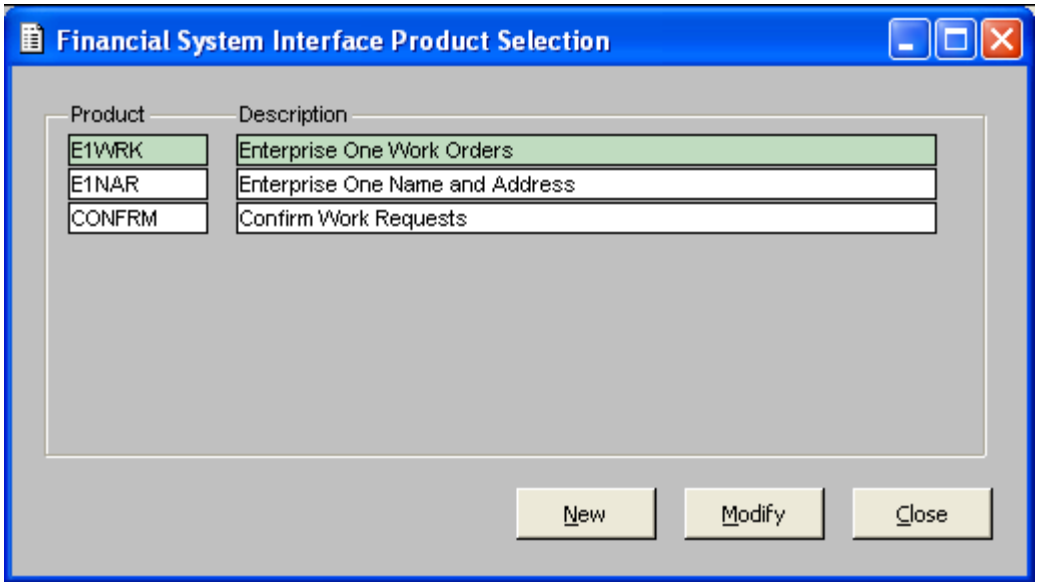
Site Code – Refers to the reference required within Confirm and held in Pathway via Plans

Authorised Function
This function will be secured under a new CIF Application Interface – Confirm Work Requests.

PATHWAY PARAMETERS

Pathway / Confirm Interface Parameters
The Confirm Interface parameters are setup within the following menu option;

System Administration Parameters >> Integration >> Financial Systems Parameters >> Financial System Integration Parameters



Access to the Confirm Work Requests parameter will be disallowed if not authority exists.

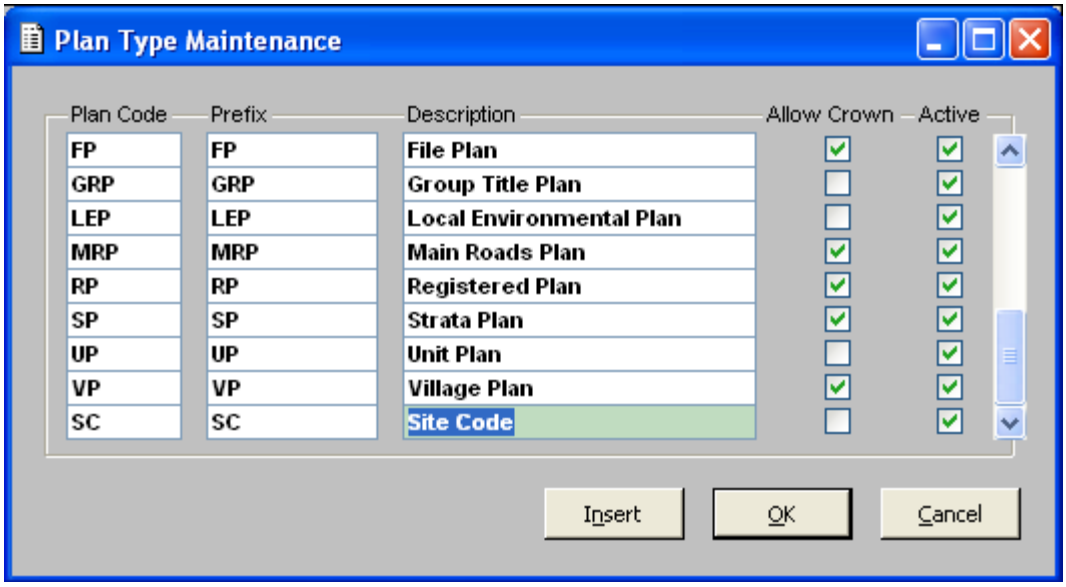
Pathway Parameters
It is recommended that the parameters and codes required for the Confirm Interface are setup in the following sequence.

Site Code (Plan Type Maintenance)
It is a Confirm requirement that a maximum 10 Character Site Code is defined in Pathway to link Council owned Properties and Street/Suburbs to a designated area. This is required by Confirm to record the Work Area and Property or Street / Suburb location of the Work Request. Any one Street/Suburb may be linked to many Site Codes and a Site Code may extend across a Street/Suburb into another Street/Suburb link, the recommendation to cater for this, is the use of Property Plans.

Currently Property Plans are used for Parcel Plans, Property Plans and Street Plans. This is existing functionality in Pathway that will allow for easy identification and storage of Site Codes are used for the Confirm Integration.

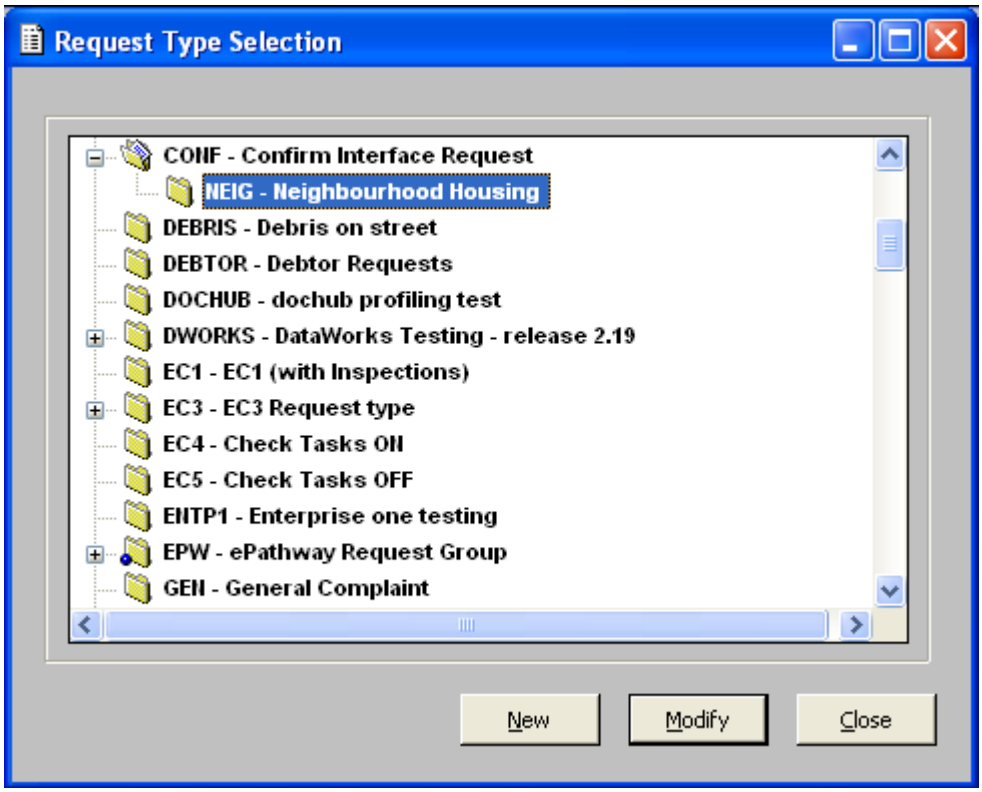
Therefore it is a requirement to Create a Plan Type of Site Code, within the Plan Type Maintenance.

Note: This Plan Type is the value that is assigned to the Work Order Integration Parameters.



Customer Request Type Parameters
It is a requirement to create 4 Character Customer Request types that match the Confirm Enquiry Type.

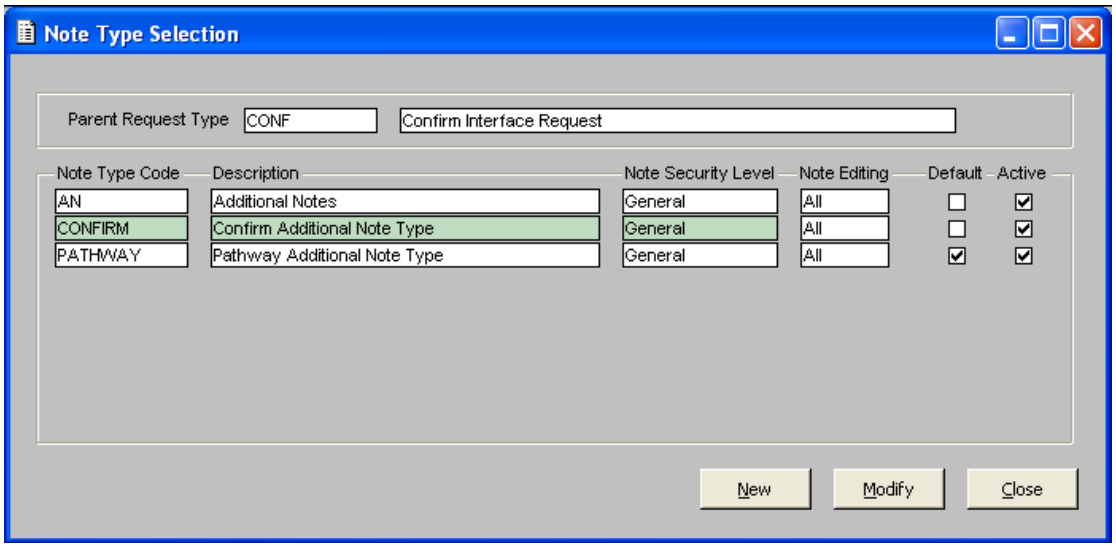
A two tier Request Type structure can be created, the Parent being the equivalent of the Service Code in Confirm and the Child being the equivalent of the Subject Code in Confirm. The Parent and Child codes must be four characters, this is a requirement of Confirm.



Note: These Request Type values are assigned to the Work Order Integration Parameters.

Customer Request Notes

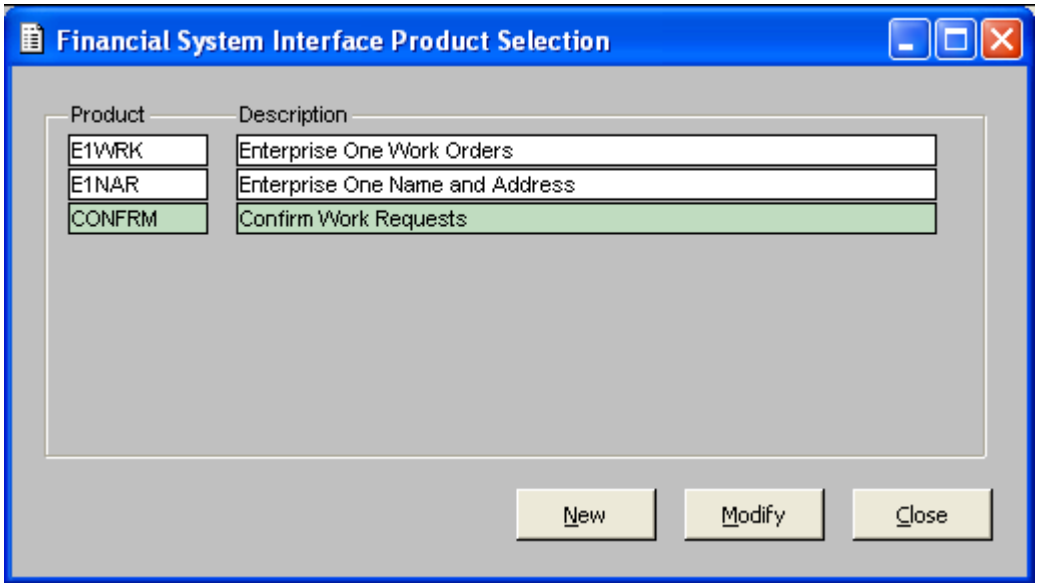
Two Note Templates are required to allow for the transfer of information to and from the Confirm.



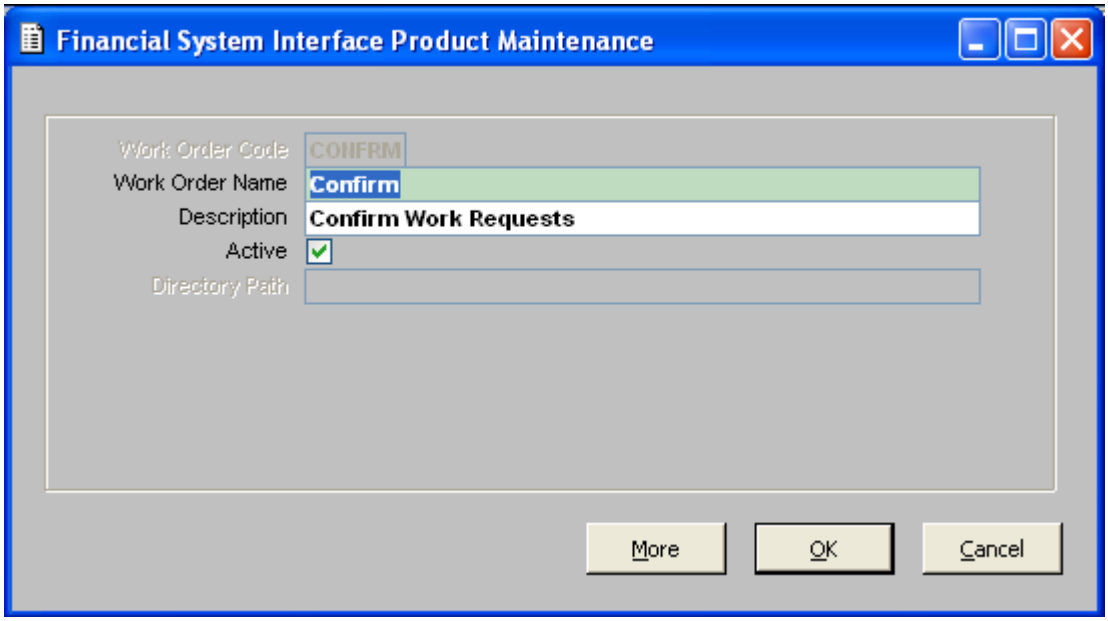
Note: These Note Type values are assigned to the Work Order Integration Parameters.

Customer Request Status
It is important that 4 character Request Status codes in Pathway are created / used, so that they match the status codes in Confirm.

Confirm Work Request Interface Parameters
System Administration >> Integration >> Financial Systems Parameters >> Financial System Interface Product Parameters >> Confirm Work Requests



Confirm Work Requests



Work Order Code
Internal field set by Pathway Initial Data.

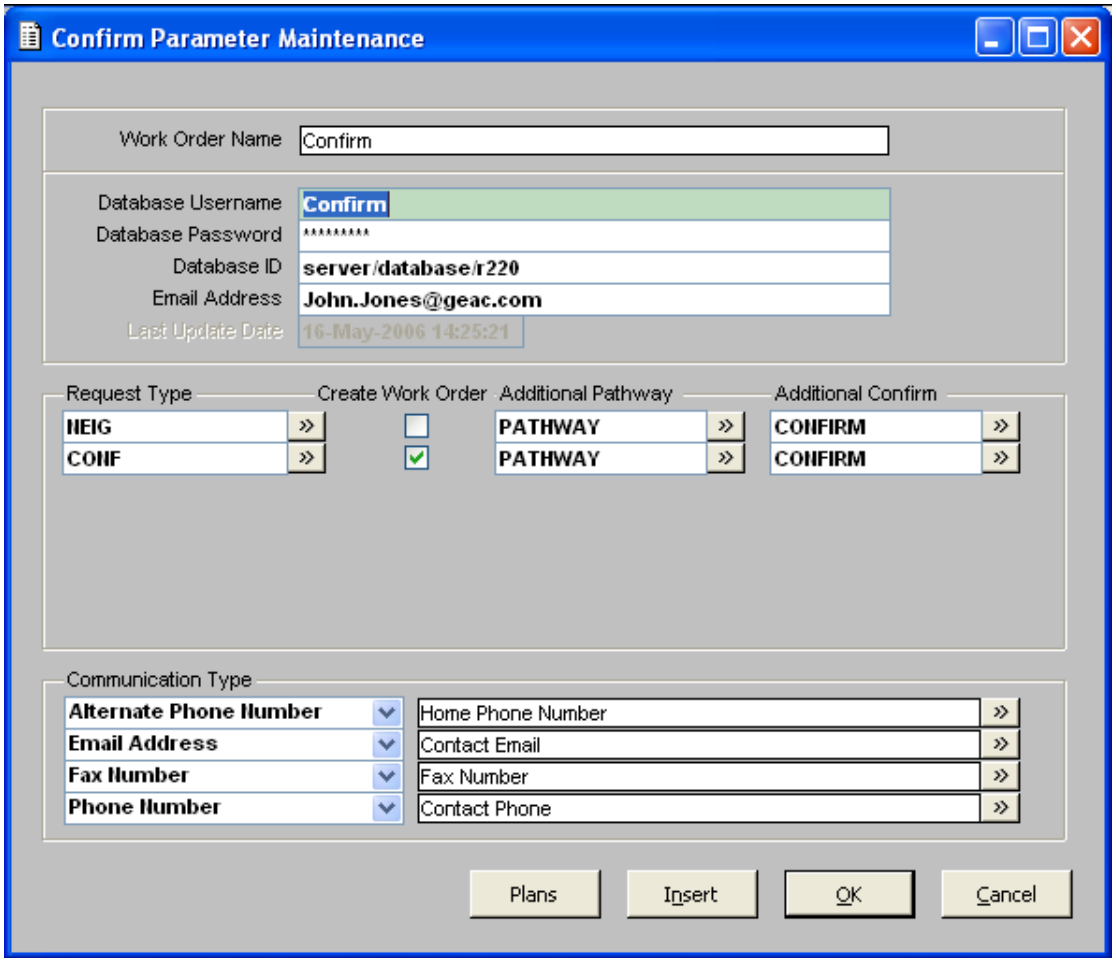
Work Order Name
This could be set to the name of the Confirm product and can be set to a maximum of 50 characters.

Description
This could be the description of the Confirm product and can be set to a maximum of 50 characters.

Active
Set this flag 'On' to activate the Confirm interface.

Directory path
Directory Path is not valid and the field will be non input capable for Confirm.

More Button
Select the More Button to define the rest of the Confirm Interface parameters.



Work Order Name
Defaulted from the previous page.

Database Username
Set this to be a valid Confirm User, however no validation within this parameter set up has been incorporated, as such, care should be taken when entering this value.

Database Password
This will be the password for the above User Id. This will be 'hidden' when entering the password and secured in the Pathway database. Again no validation has been setup for this parameter, as such care should be taken when entering this value

Database ID
This will be a value that uniquely identifies the Confirm database, being the equivalent environment that Pathway will update (ie Live or Test/Training)

Email Address
The email address of the user that will receive email notification of any Confirm to Pathway batch interface exceptions. When received, the user can view the exceptions via menu option,

Customer Service >> Batch Functions >> Confirm Background Update Exception Log.

Last Updated Date
This must be set to the date that the Confirm Interface has commenced. It is used as the reference date and time for the Confirm to Pathway Batch update of Statuses and Notes.

When the Date is entered and the OK key is pressed, the field is changed to read only.

Request Type
Enter / Select the Request Type codes that will be used by the interface. As previously stated, the Request Type Codes must be four characters and exist in Confirm.

Create Work Order Check Box
On / Off - This is used to determine whether the creation of the Confirm Enquiry occurs on the OK button, or whether it occurs only via the 'Create Work Order' function)

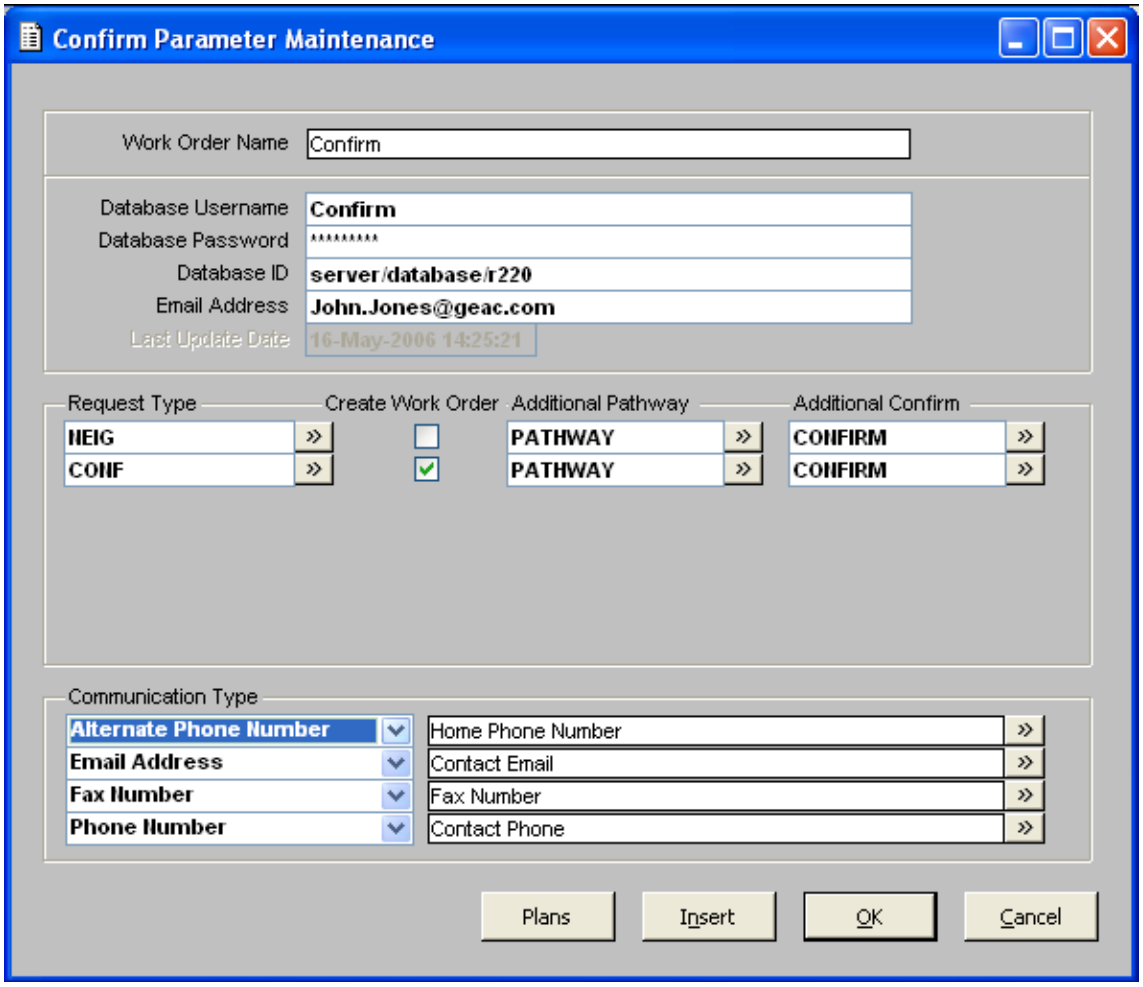
Checked - will create a Confirm Enquiry automatically on acceptance of the Request (Note: this does not exclude the ability to take the Create Work Order function prior to accepting the Request)

Un-Checked - will optionally create a Confirm Enquiry, when the User takes the Create Work Order function

Additional Pathway
This relates to a Note Type that would be used by a Pathway User to add a new Note to an existing Request, and where that Note information is to be passed to Confirm.

Additional Confirm
This relates to a Note Type that would be used to add the Confirm Enquiry Notes to the Pathway Request. This Note Type would have to be defined for the Request Types.

Communication Type



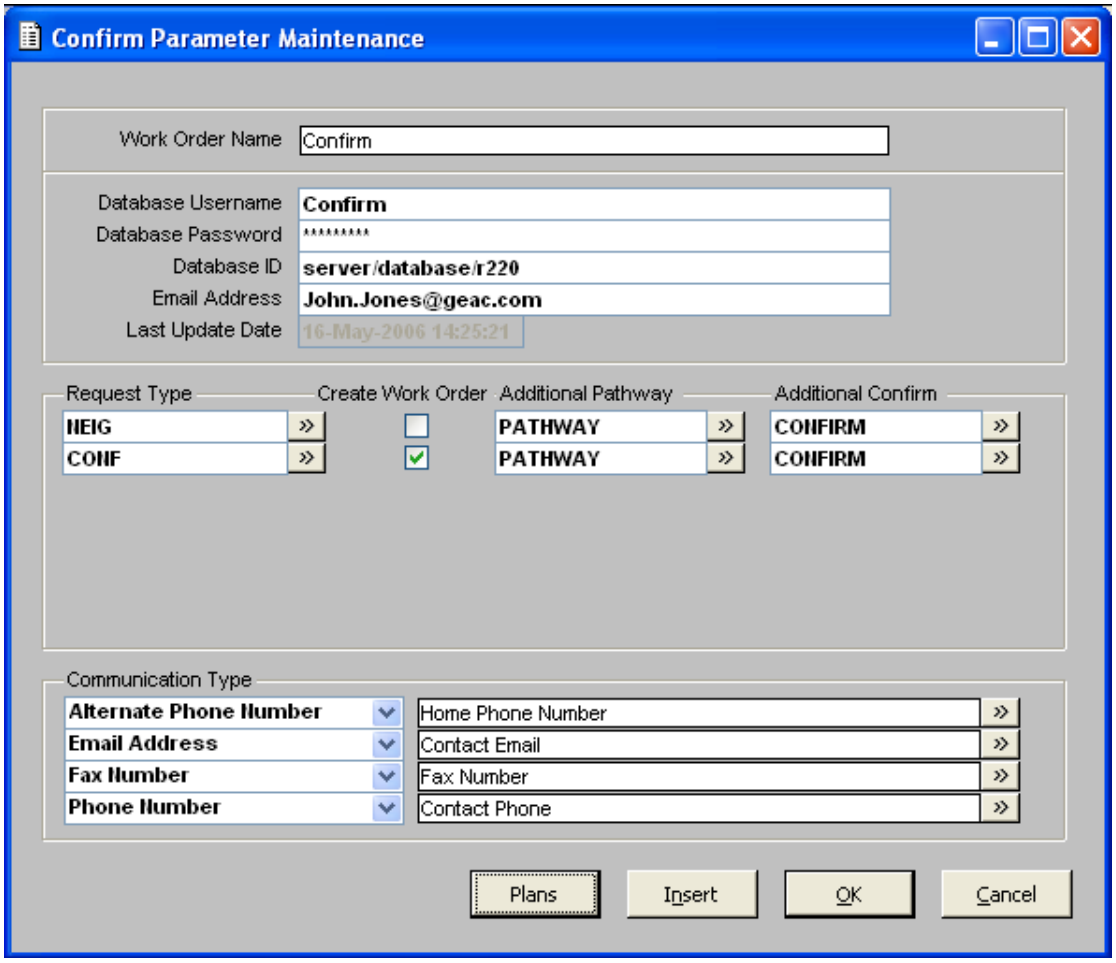
Use the drill out option to select the user defined communication types for the following;

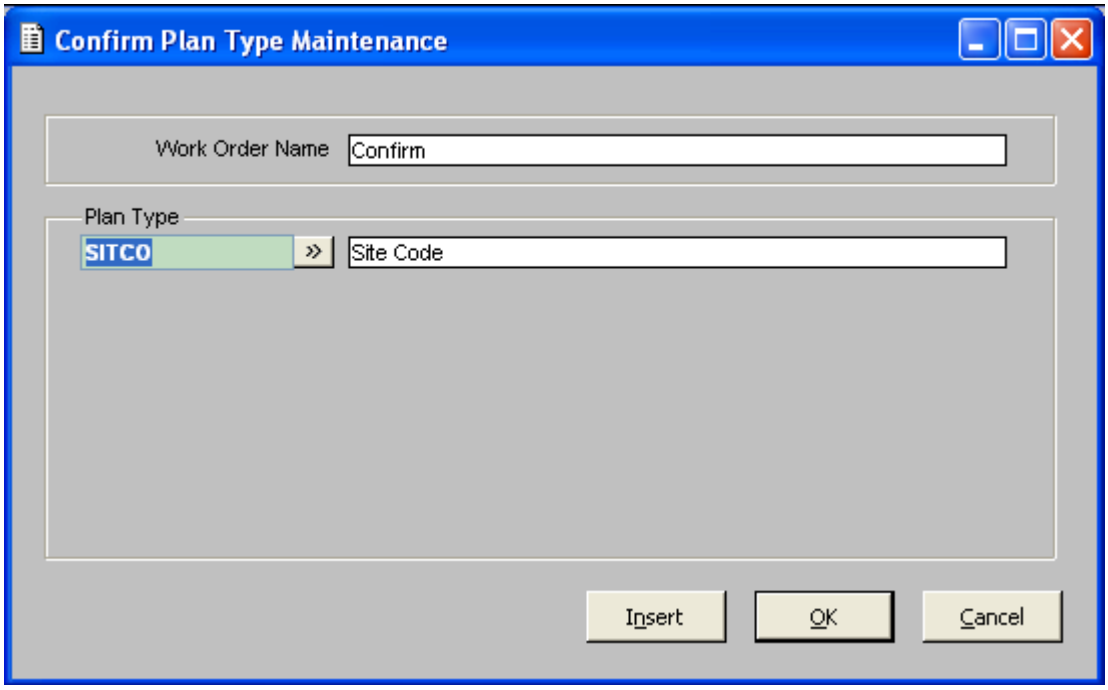
- Phone Number

- Alternate Phone Number
- Fax Number
- Email Address

When a Name Role is associated to a Customer Request, any communication information for the above types will be passed to Confirm.

Plan Types
Select the Plans button to display and add Plan Types.





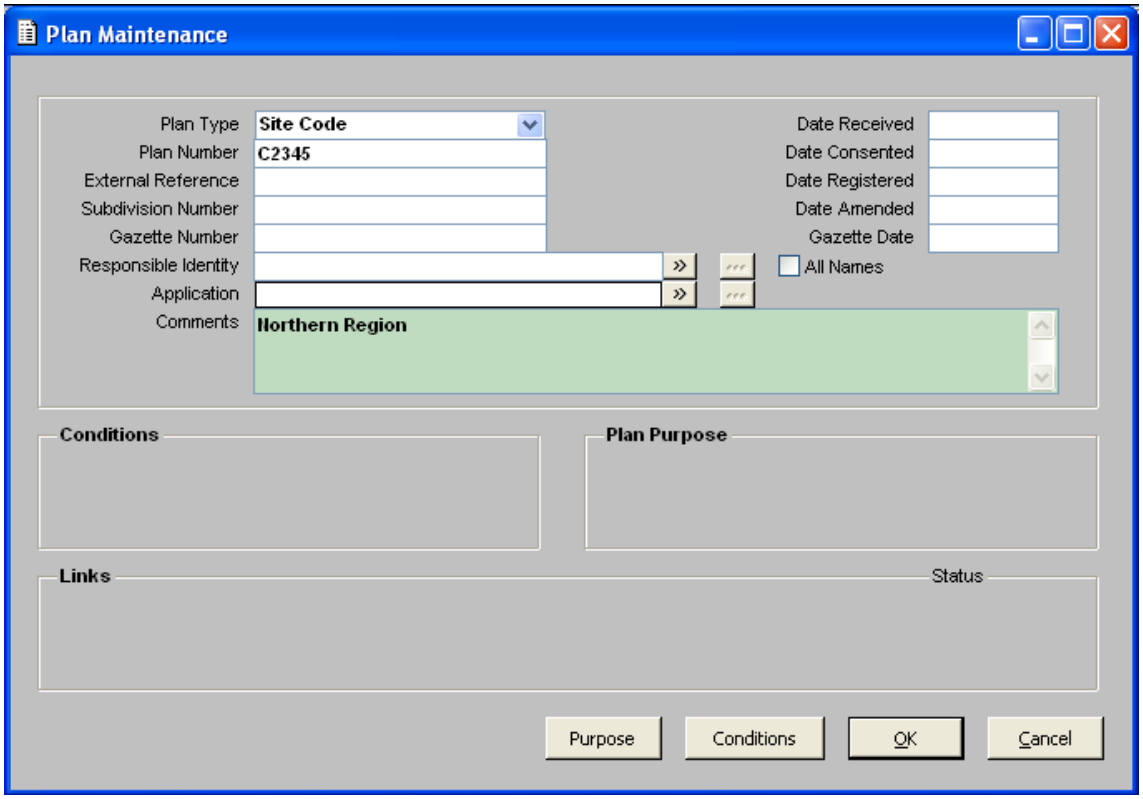
Use the drill out option to select the Plan Type Code that has been created for the Site Plans. When a Customer Request is associated with either a Property or Street / Suburb. The system will check for the existence of a Site Plan, it will then copy the Site Plan information to Confirm.

Confirm Work Request – Process Requirements

Site Plans
It is a requirement to create one or many Site Plan records, to define the Work Area Boundaries within the council.

- Plan Type as per above
- Plan Number will be the Site Code number itself
- The External Reference or Comments could be the Reserve Name/address etc (visual description that the Site Code relates to) where applicable or left blank.

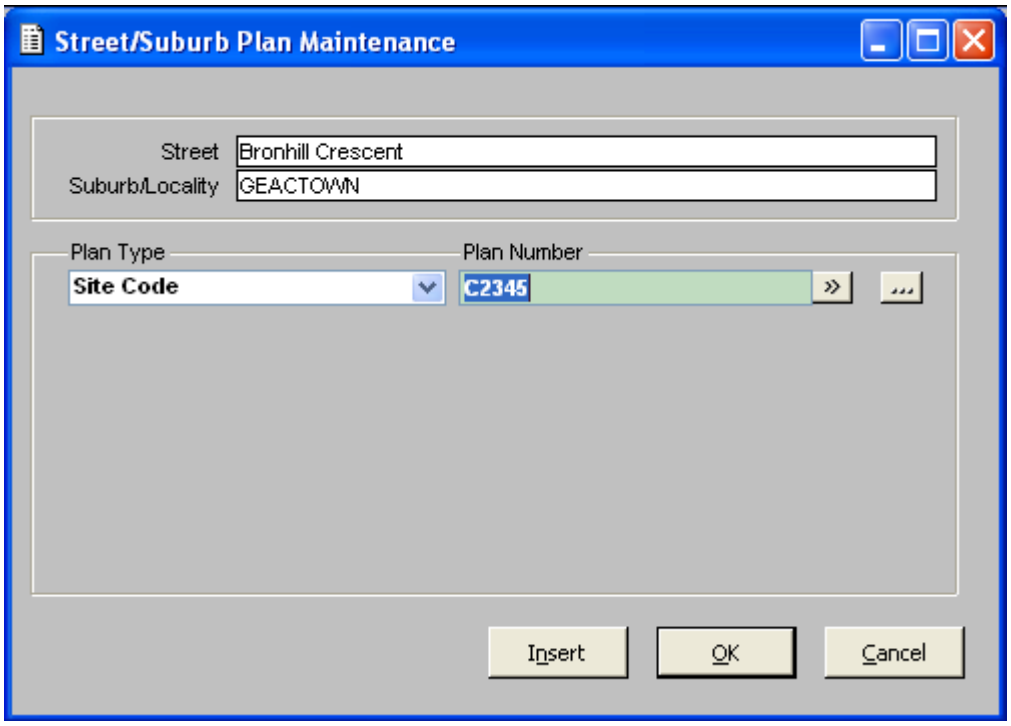
Plan Site Codes should be created for those applicable to Council owned properties and all Street/Suburbs.


Plan Maintenance
Plan Type
Site Code
Plan Number
C2345
External Reference
Subdivision Number
Gazette Number
Responsible Identity
Application
Comments
Northern Region
Date Received
Date Consented
Date Registered
Date Amended
Gazette Date
All Names
Conditions
Plan Purpose
Links
Status
Purpose
Conditions
OK
Cancel

Create Pathway Property Plan relationship to Street/Suburb

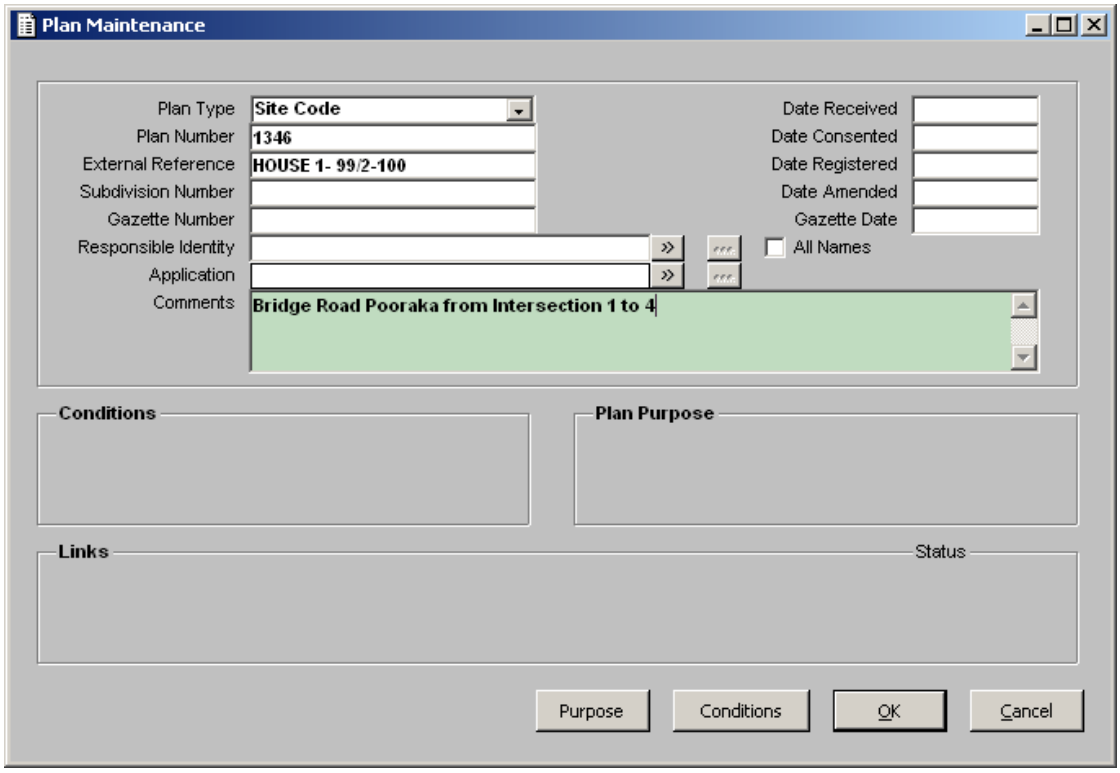
As part of this integration development, a modification has been made to Streets to enable a Plan to be linked to a Street/Suburb. Currently it is available to be linked at a Street level only, which will still be retained

This enhancement has been made to the Street Maintenance Form, when Suburb is taken from options, or ‘double click’ on a Suburb.



The Plan Button alongside the Street / Suburb can be to allow a link to a Plan to be created, in the same manner that a Street allows a link to a Plan.

Detail on Plan that can be recorded is as follows:



The External Reference & Comments can be used for additional information to further clarify the Site Code for the benefit of the User creating the Request.

Street/Suburb
Link the relevant Site Code 'Plan' to the Street/Suburb (or multiple Site Code 'Plans' where a Street /Suburb includes more than one Site Code)
The same Site Code 'Plan' can be linked to more than one Street/Suburb.
End result is one Street/Suburb could have one or many Site Code Plans attached.
Note: Plans are to be linked at the Street/Suburb level (enhanced functionality being implemented as part of this development) not the Street level.

Create Pathway Property Plan relationship to Property

Council Owned Properties
Link the appropriate Site Code 'Plan' against the Property using the Property Plans Option from the Property Summary Options Dropdown (ie: these are not Parcel Plans) or the Site Code 'Plan' can have properties linked direct via the Plan Maintenance menu option (System Menu >> Property Administration >> Plan Maintenance).

Property where more than one Site Code 'Plan' relates to a Street Suburb
Where a Street/Suburb has more than one Site Code 'Plan', it may be advisable to link the relevant Site Code 'Plan' to the Properties within that Street/Suburb, that relate to the part of the street length that the particular Site Code 'Plan' relates to.

This would only be required where there is multiple Site Codes for a Street/Suburb.

Ie: Street is Geac Street, Geacville
Has 2 Site Code 'Plans' linked – Site Code A and Site Code B
House Numbers range from 1 – 250 (odd/even range)
Numbers 1 – 99 and 2 - 100 are in Site Code A
Numbers 101 – 249 and 102 – 250 are in Site Code B

As such, all Properties for 1 - 99 and 2 -100 are also linked to Site Code 'Plan' A

And
All Properties for 101 – 249 and 102 – 250 are also linked to Site Code 'Plan' B.

Interface Processing for Site Code Selection
The Interface process to create a new Confirm Request (OK button or Create Work Order option) will check the Plans on a Property or on a Street, based on the link on the Customer Request.

OK Rule:
When OK is taken, the process will firstly check that the Create Work Order parameter to allow Work Order Creation has been set to ON
AND
The System Interface Parameters are set to Confirm Work Order
AND
The Site is authorised to the Confirm Enquiry Authorised Function
AND
Check the CIF table associated to the Request, which holds the Confirm Enquiry Number, Site Code as this will indicate a previously created Confirm Enquiry.

Create Work Order Rule:
When this option is taken, the process will firstly check that the System Interface Parameters are set to Confirm Work Order
AND
The Site is authorised to the Confirm Enquiry Authorised Function
AND
Check the CIF table associated to the Request, which holds the Confirm Enquiry Number, Site Code as this will indicate a previously created Confirm Enquiry.

Rule 1:
Where both a Property and Street/Suburb are linked, it will use the Site Code from the Property if one exists on the Property
If there is no Site Code on the linked Property, then it will use the Site Code from the Street/Suburb link.
This is to allow the Property to be used where multiple Site Code 'Plans' are linked to the Street/Suburb.

Rule 2:
Where only a Property is linked (no Street/Suburb linked) and there is no Site Code on the Property, it will use the Street/Suburb(s), linked to any 'current' Property Address (Primary and Alternate) to determine the list of 'distinct' Site Plan Codes from those Street/Suburbs and display those for selection.

Ie: this would be used, where the location of the problem is outside of a particular property and therefore the property address is used to identify the Street/Suburb Site Plan Code. If a Property is on a corner and has a different Street/Suburb on an alternate address, it must check this as well.

Rule 3:
If there is more than one Plan on the Property or Street/Suburb, the User will be prompted with the list of Plans to select from.

The display of the Plan details will include the following:

Property Address or Street/Suburb Name
Plan Type Plan Number External Reference
Comments

Ie:
Geac Street Geacville
Type: Site **Plan:** A **External Reference:** House Numbers 1-99/2-100
Comments: Geac Street Geacville from Intersection 1 to 4
Select **Cancel**

Or

Waterloo Corner Road, Salisbury North
Type: Site **Plan:** R8765 **External Reference:** Happy Home Reserve
Comments:

Select **Cancel**

Rule 4:
'Select' will continue with the Interface process and either take the User back to the Request (where the 'Create Work Order' from Associated Menu has been used)
Or
Return to Request Entry for new request or search (where the OK was taken from the new or modified Request)

Rule 5:
'Cancel' will generate a Confirm Message as follows:
'Warning: No Confirm Enquiry will be Created, Do You Wish to Continue with the Cancellation'
Yes/No

If the User selects 'Yes', the Pathway Request will be created without the Confirm New Enquiry function being initiated.
The user may decide to take the Cancel option, to allow them to go to GIS, locate the record and note the Site Code, to ensure that they have the correct one selected
Or,
The User can return to Pathway, re-select the newly created Pathway Request and add the relevant Property link, which will carry the specific Street/Suburb Site Plan Code relative to that Properties position in the street.
The User can then take the OK button again, or the 'Create Work Order' option, which will again prompt with the Site Code 'Plan' list for them to select from or the software will use the Property Site Code 'Plan'.

If the User selects 'No', it returns to the Site Code 'Plan' selection Form.

Rule 6:
If there is only one Site Code Plan attached to the Street or Property, then the User is not prompted to take any further action, and the data is passed to the Confirm interface process automatically.

Important: Please be aware that the Property and Street links used for the purpose of establishing the Site Codes will be the standard default Property and Street Roles, NOT User Defined Roles.
Ie: LPA 0 (Property) and LPA 1 (Street) as defined in Customer Service Role Parameters.

Initial Work Order Creation

Where it is established that a Confirm Enquiry has NOT been previously created, the following will occur:

The single Site Code Plan number linked to the Property or Street/Suburb (based on the rules in the previous section)
Or
The selected Site Code Plan number,
will be used to construct the CIF table record and the detail that is passed to the Confirm Methods of NEWENQUIRY and ENQUIRYCUSTOMER.

The CIF table record will be created with the data as follows:

TFKACRREQU Link to Request
TFKLPAPLAN Site Code Plan TPK
External Reference – this will be the Confirm Enquiry Number, refer notes below
Last Note Date/Time – Date/Time of the Last Note on this Request at the time this record was created

Pathway User Name
Date Created

Note: This table holds a field to reflect the Confirm Enquiry number, but that will be initially blank until such times as the call to the Confirm Method is complete and the Enquiry Number returned.

Data collected and passed to the Confirm Methods are as follows:

NEWENQUIRY fields	Pathway fields/values
ExternalSystemNumber	This is an indicator to Confirm that the request is from an external system, this is currently hard coded to '1'. The external system name must be created in Confirm and the external system record must be = '1'.
ExternalSystemReference	Pathway Request Number
Service Code	Parent Request Type (4 Characters)
Subject Code	Actual Request Type (4 Characters)
EnquiryDescription	Note or Notes on Request at the time the Request is created
EnquiryLocation	Formatted Property Address - if there is ONLY a property linked to the Pathway Request OR Street/Suburb – if there is ONLY a Street linked to the Pathway Request. **Note:** The Property takes precedence, where both Property and Street are linked to the Pathway Request
SiteCode	Plan Number, being the Site Code 'Plan' selected or existing on Street or Property.
CustomerReference	Pathway Request Number
ContactName	Customer Name of first sequenced name using the **'default'** CNA Role Type (Surname, Given Names format)
ContactPhone	Phone Number from name selected – based on Comm Type mapped to 'Phone Number' in the Confirm Parameters
ContactAltPhone	Phone Number from name selected – based on Comm Type mapped to 'Alternate Phone Number' in the Confirm Parameters
ContactFax	Fax Number from name selected – based on Comm Type mapped to 'Fax Number' in the Confirm Parameters
ContactEmail	Email address from name selected based on Comm Type mapped to 'Email Address' in the Confirm Parameters

ENQUIRYCUSTOMER fields	Pathway fields/values
CustomerTitle	Title where applicable (refer above rules on Name selection)
CustomerSurname	Surname (refer above rules on Name selection)
CustomerForename	Given names (refer above rules on Name selection)
ContactPhone	Phone Number from name selected – based on Comm Type mapped to 'Phone Number' in the Confirm Parameters (as per

	above section)
ContactAltPhone	Phone Number from name selected – based on Comm Type mapped to 'Alternate Phone Number' in the Confirm Parameters (as per above section)
ContactFax	Fax Number from name selected – based on Comm Type mapped to 'Fax Number' in the Confirm Parameters (as per above section)
ContactEmail	Email address from name selected based on Comm Type mapped to 'Email Address' in the Confirm Parameters (as per above section)
CustomerSecondaryAddress	Not applicable/required.
CustomerPrimaryAddress	Address detail prior to Street Name (could be House Id field or a Prefix Field OR PO, GPO etc where no Street recorded)
CustomerStreetDesc	Street Name (including Qualifier) where applicable
CustomerLocalityName	Suburb
CustomerTownName	Postcode
CustomerCountyName	State Code
CustomerPostCode	Not applicable

Update of Information Returned from Confirm

This information above, is passed in the Method to Confirm and Confirm will respond with the 'Enquiry Number.

This Confirm Enquiry Number will be updated in the CIF table. Field External Reference, for the record created.

Examples of Recommended Set up and Processing

Street = Geac Road
Suburb = Salisbury
Site Code Plan G10

Street = Geac Road
Suburb = Salisbury North
Site Code Plan G20

Street = Geac Road
Suburb = Bolivar
Site Code Plan G40
Site Code Plan G50

Property at 50 Geac Road Salisbury North is a Council Owned Property
Site Code Plan of P50

Property at 75 Geac Road Bolivar is a non Council Owned Property, but has been updated with **Site Code Plan G40**, as it relates to the section of Street for G40.

Example 1/
Request is created and Geac Road, Salisbury linked.
OK to accept Request, will automatically pass G10 as the Site Code to Confirm

Example 2/
Request is created and 50 Geac Road Salisbury North is linked
OK to accept Request, will automatically pass P50 as the Site Code to Confirm

Example 3/
Request is created and both Geac Road Salisbury North and 50 Geac Road Salisbury North are linked.
OK to accept Request, will automatically pass P50 as the Site Code to Confirm

Example 4/
Request is created and Geac Road Bolivar is linked
OK to accept Request, will present to the User the two Site Code 'Plans' linked to the Street/Suburb.

Example 5/
Request is created and both Geac Road, Salisbury North and 100 Geac Road Salisbury North is linked
OK to accept Request, will automatically pass G20 as the Site Code to Confirm, as there is not Site Code Plan linked to 100 Geac Road Salisbury

Example 6/
Request is created and both Geac Road Bolivar and 75 Geac Road Bolivar is linked
OK to accept Request, will automatically pass G40 (from the Property) as the Site Code to Confirm.

Update to an existing Confirm Request Record

Where it is established that a Confirm Enquiry HAS been created (by the existence of a record in the CIF table with a Confirm Enquiry Number), the following will occur on the OK of the maintenance form, or the 'Create Work Order' option:

Rule 1:
The integration processing will check for the existence of a Note Type matching the 'Pathway Additional Information Note Type' in the Work Order Parameters.

If a Note of this Type is found, it will further check the CIF table data to determine if the Last Note Date/Time field value matches the one found on the Request.

Rule 2:
Where the Note Date/Time on the Request is equal to or less than the Note Date/Time in the CIF table, then no further action will be taken

Rule 3:
Where the Note Date/Time on the Request is greater than the record in the CIF table, or where the Note Date/Time in the table is null/blank, Pathway will initiate the call to the Confirm EnquiryUpdate Method.

It will pass the following information to the Confirm Method:

EnquiryUpdate fields	Pathway Request Fields
Enquiry Number	As defined from the CIF table, field External Reference linked to the Request
External System Number	Request TPK
External System Reference	Request Number
Enquiry Status Code	Status Code on the Request in Pathway

Status Log Notes	Information from new Note added to Pathway Request (That matching the Note Type, as per above)

This process will update the Status on the Confirm Enquiry, to that defined in Pathway (which could be the same as what was in Confirm which is quite okay) and will add a Note transaction to the Enquiry.

Customer Request Work Order Glyph – Enquiry/Maintenance

The existing Work Order glyph (witches hat) will be displayed on the Summary Form in both Request Maintenance and Enquiry ONLY where there is a record in the CIF table for the Request.
Selection of this 'glyph' will display the contents of this table to the User as follows (or similar):

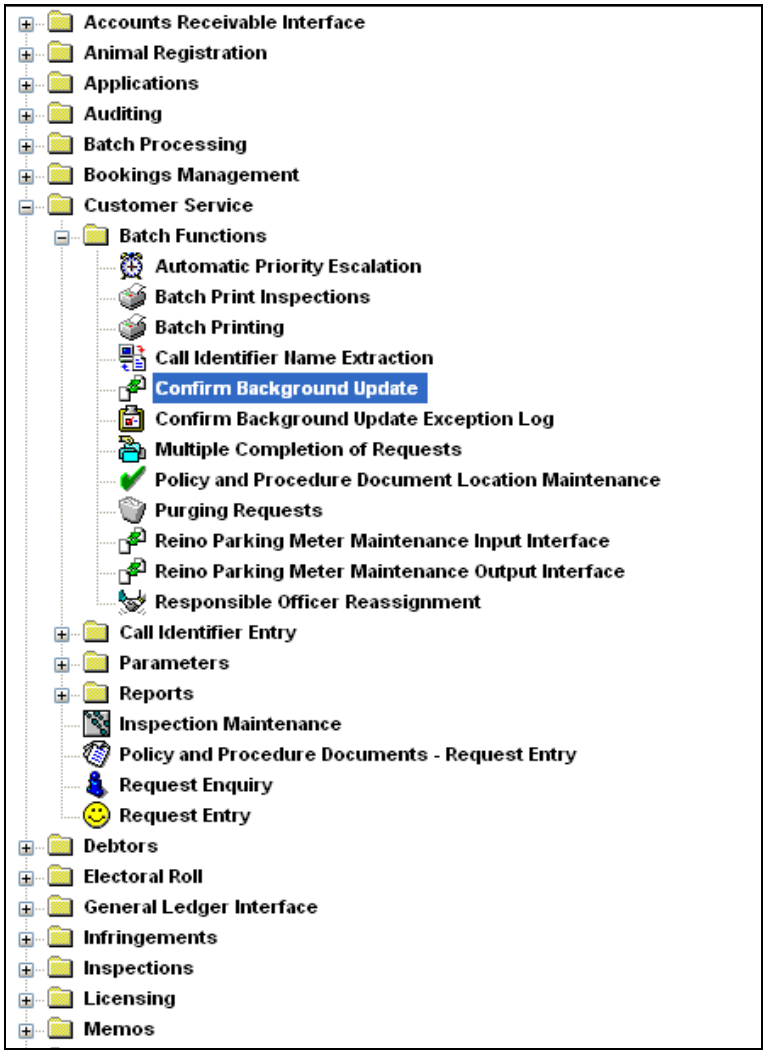
Enquiry Number_____ Date Created_____User_____
Site Plan Code _____ Comments_____
Last Note Date/Time _____

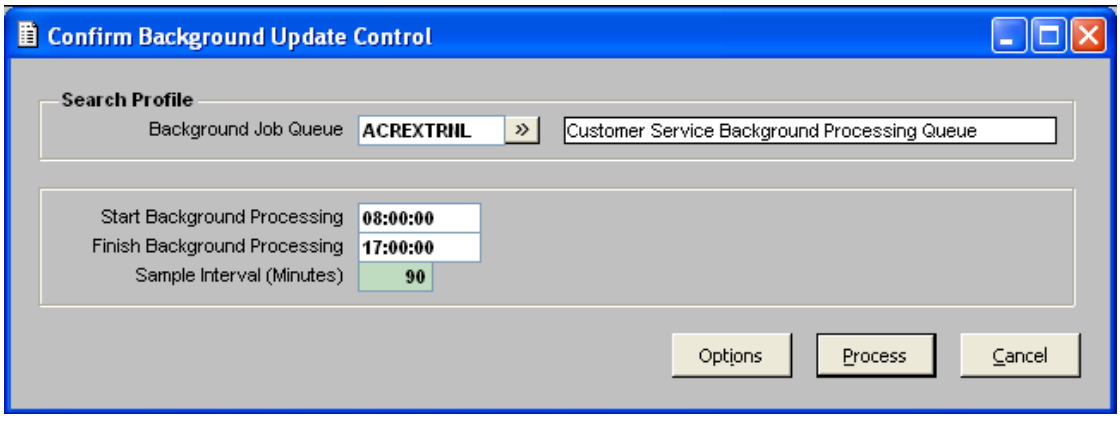
Note: The Plan comments are retrieved using the TFKLPAPLAN value.

Update Status and Notes from Confirm

Important:
The Status Codes in Pathway Customer Service and the Status Codes in Confirm must match.
Status Code in Pathway is 10 characters.
Status Code in Confirm is 4 characters.
Therefore Pathway Customer Service should be set up with the relevant 4 character codes. There is no other validation performed, except to ensure that the Status Code matches.

The ability to update the Status from Confirm into Pathway, will be achieved by an asynchronous job in Pathway, which simply makes the call to the relevant Confirm Method.





The job when submitted, will call the Confirm method, and pass in the 'last date' that this Form/process was run.
This 'last date' can be retrieved from the Last Run Date as part of standard Pathway Batch processing.

The Confirm Method returns a list of Confirm Enquiry records and their associated Status Codes and Status Log Notes, ONLY where the Status Code has changed since the last run date, or where the Status Notes have changed since the last run date.

The Pathway process will update the relevant Customer Request records, using the CIF table to match on Confirm Enquiry Number, or the External System Number passed from Confirm (Pathway Request TPK).

This is a seamless update from a User viewpoint, as it occurs in background.

Note: Status Log Notes are transactional notes that the user of Confirm may enter, either as part of the Status Update or independently of a Status Update.

The process that Pathway will use cannot distinguish between a real Status change or just Status Transactional Notes change and as such, it could well be that a 'change' record is received that does not actually change the Status in Pathway, but simply adds a new Note.

The data returned by Confirm will be a Status Code that should match the Status Code defined in Pathway Customer Service.

This Status will simply be applied to the Pathway Request.

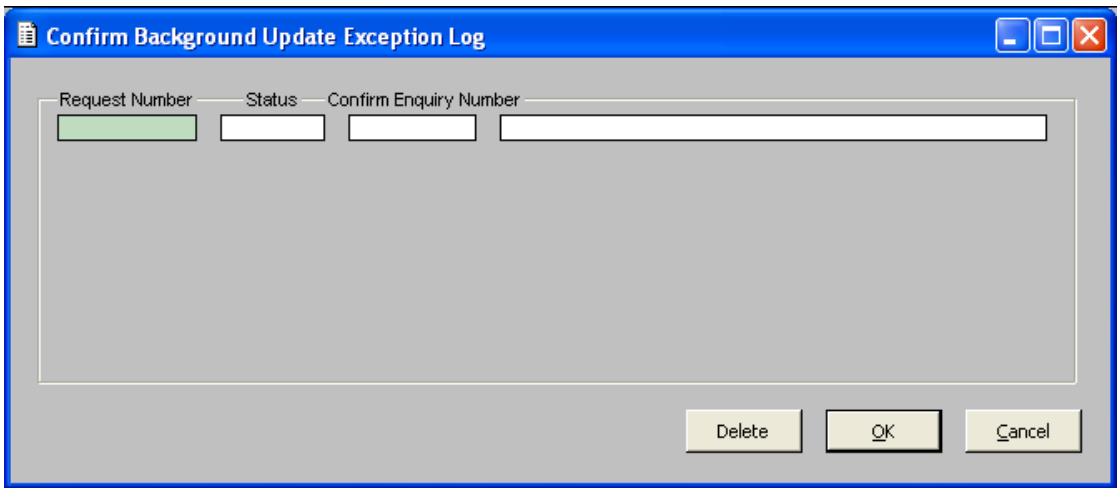
Where the Status Code being updated has a 'Complete' status in Pathway, then the standard Customer Service processing will need to be initiated and performed.

In addition, Note information may be returned by Confirm. This is to be used to create a Note in Pathway using the Note Type defined in the System Parameters (Additional Confirm Note Type).

Exception Log:

An Exception Log will be created as part of this process, to cater for a situation where:

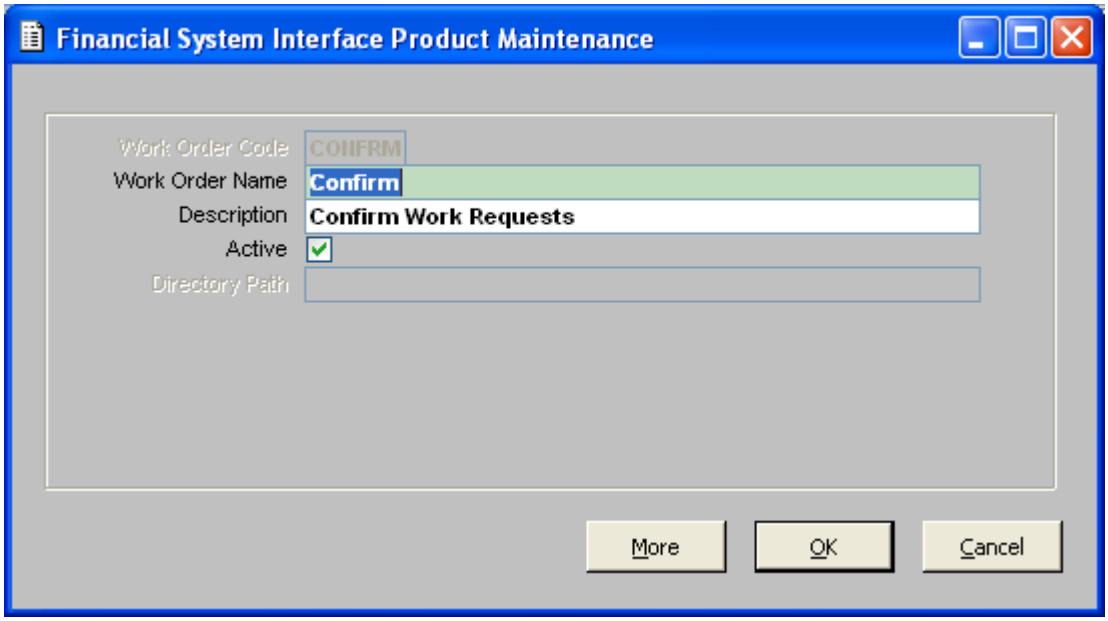
- the Request cannot be found (deleted from Pathway)
- the Status Code provided by Confirm does not exist in Pathway.



The Exception Log will list the Pathway Customer Request TPK, Request Number, Confirm Enquiry Number and the Status Code passed from Confirm.

Confirm Work Requests

Refer to Confirm Asset Management Installation Guide



Confirm Work Requests Product Parameter Maintenance Form

Work Order Code
This field will contain the Work Order Product Code as defined by INFOR.

Work Order Name
This field will contain a Description of the Work Order Product, it can be changed if required.

Description
This field will contain a Description of the Interface. It can be changed if required.

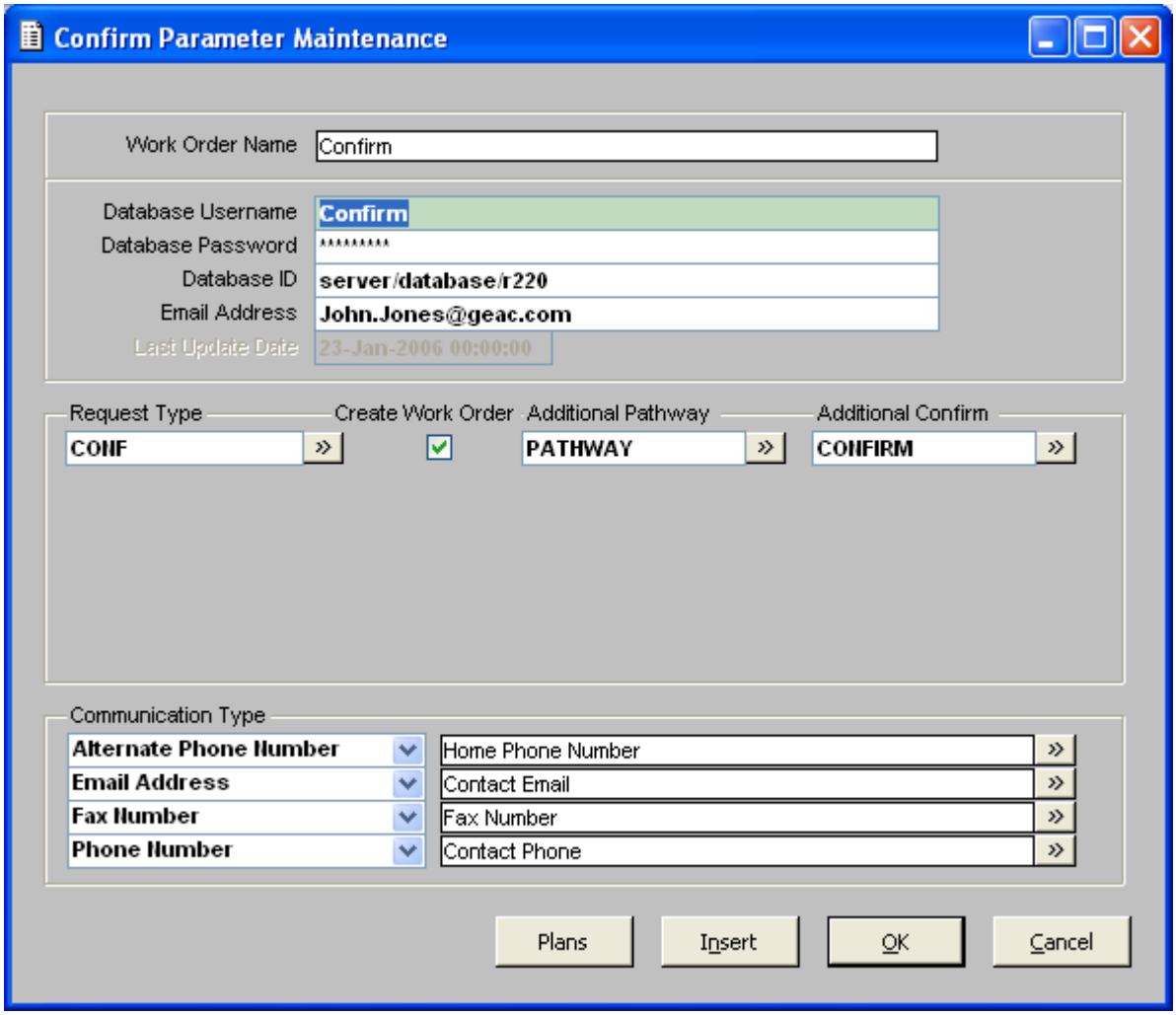
Active
This flag will indicate if this financial interface is active

Directory Path
This field will hold the Path for an executable where required.

More Button
Use the more button to access the Work Order Produce Parameters form to define the required parameters for this interface.

Confirm Parameter Maintenance Form

Refer to Confirm Asset Management Installation Guide



Confirm Work Requests Product Parameter Maintenance Form

Work Order Name
This field will contain a Description of the Work Order Product, it can be changed if required.

Database User Name
Enter in a valid Confirm User name. No validation for this parameter is performed, therefore care should be taken when entering this value.

Database Password
Enter in a valid password for the Confirm User name entered above. No validation for this parameter is performed, therefore care should be taken when entering this value.

Database ID
This uniquely identifies the Confirm database, being the equivalent environment that Pathway will update (ie Live or Test/Training)

Email Address
Enter in the email address of the user that will receive notification of errors occurring in the Confirm to Pathway Batch update.

Last Updated Date
The Initial Last Update value only needs to be set once before the Confirm Batch Process is started for the first time. Failure to do so will cause the Batch process to fail. Once set, this value can no longer be modified by this form.

Request Type
Enter in the Request Types that are to be stored in Confirm.

Create Work Order
The Create Work Order option allows for Automatic Creation of the Confirm Request as the user accepts the Customer Request Maintenance form via the OK Button. If this option is disabled, the user will be prompted as to whether they want to create a Confirm Request.

Additional Pathway Note
Select the Customer Request Note type that will be used to pass Note Information to Confirm.

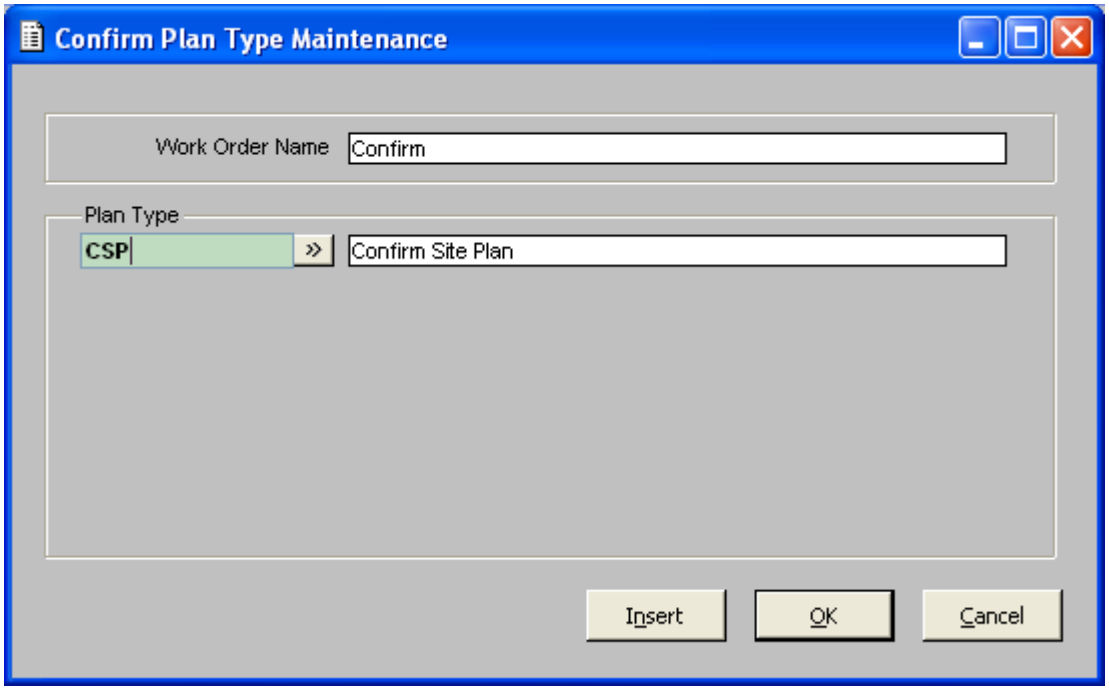
Additional Confirm Note
Select the Customer Request Note type that will be used to pass Confirm Note Information to Pathway.

Communication Type
The drop down displays a list of Confirm Communication Type Codes that can be used to pass data from the Pathway Name and Address record to Confirm. When a Confirm Type is selected, the equivalent Pathway Communication Type must be selected.

Plans
Select this option to link the Plan Types that will be used by the Confirm Interface.

Confirm Plan Type Maintenance Form

Refer to Confirm Asset Management Installation Guide

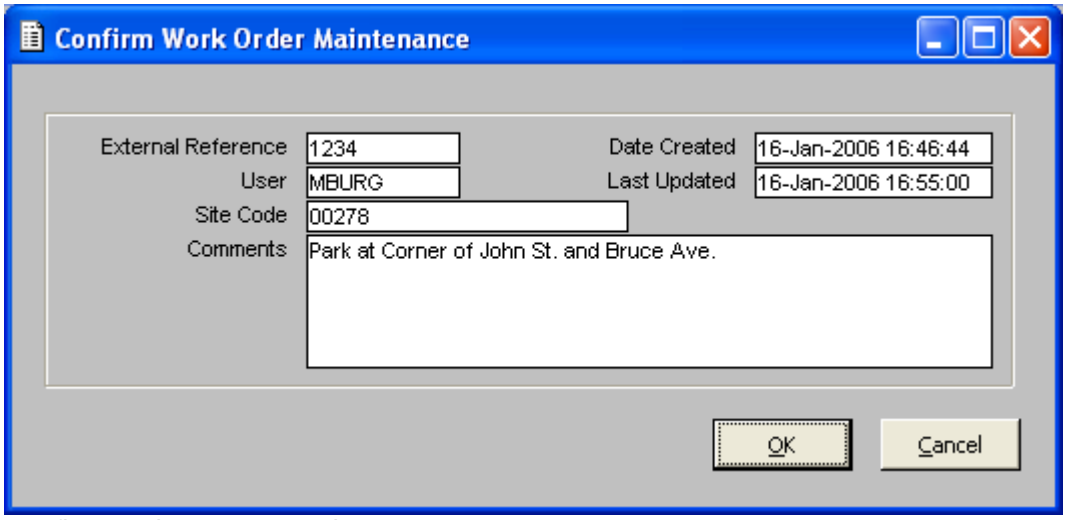


Confirm Work Requests Plan Type Maintenance Form

Plan Type
Insert the Plan Type(s) that will be used by the Pathway to Confirm Interface.
If more than one Plan, for that Plan Type, is linked to a Property, Alternate Address or Street/Suburb, the Confirm Interface will prompt the user to select which Plan is to use as the Site Code in Confirm.

Confirm Work Order Maintenance

The Confirm Work Order Maintenance form is accessed via Customer Request Maintenance, by clicking on the Work Order 'Witches Hat' Glyph or via the Work Order option within the Associated menu group, when a Confirm Work Order has been lodged for the Request. This form displays a summary of the Work Requests and contains the Confirm Enquiry Number in the External Reference field.
Refer to Confirm Asset Management Installation Guide



Confirm Work Requests Maintenance Form

External Reference
This is the Reference Number returned from Confirm

Date Created
This is the date the Confirm Request record was created.

User
This is the Pathway User that was logged on when the Confirm Request was created.

Last Updated
This is the date when the Pathway was last updated from Confirm.

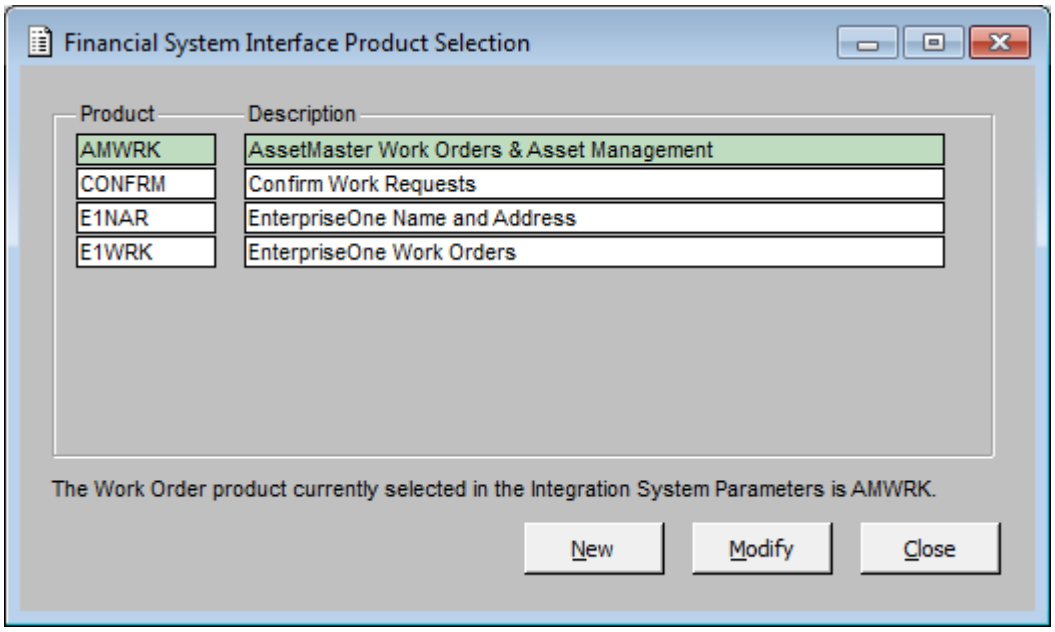
Site Code
This is the Site Code that was used when the Confirm Request was created.

Comments
This is the description of the Plan Code that was used when the Confirm Request was created.

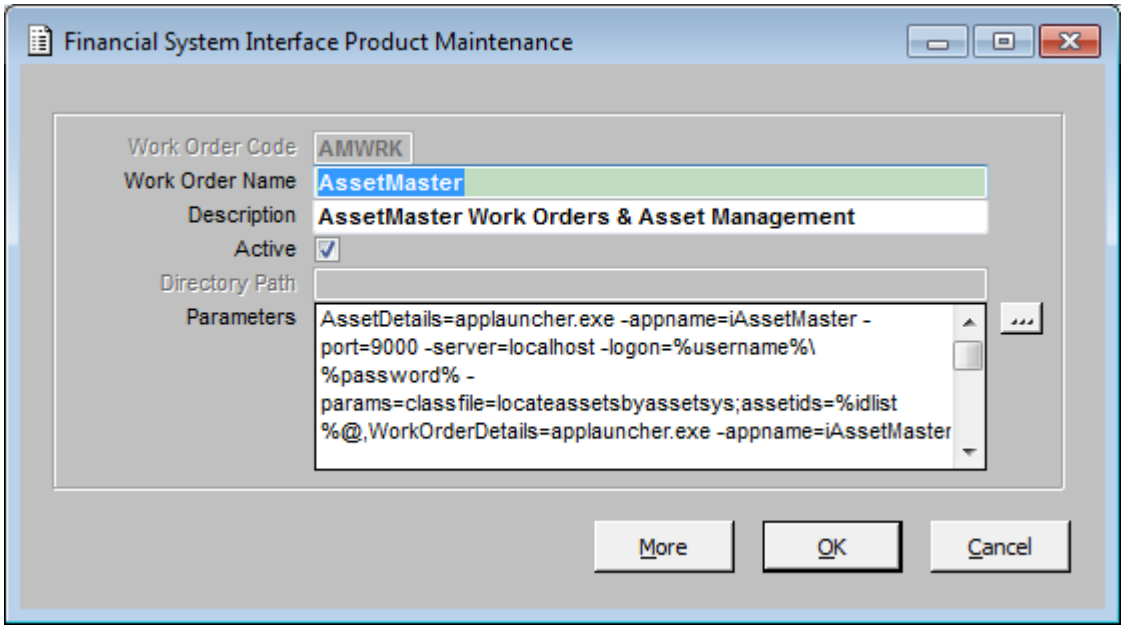
AssetMaster Asset Management Interface

Financial System Interface Product Selection

The AssetMaster Work Order option can be configured by pressing Modify on this selection form:



Financial System Interface Product Maintenance



Work Order Code
This field displays the AssetMaster Work Order code will be displayed but cannot be modified

Work Order Name
This field displays the AssetMaster Work Order name will be displayed

Work Order Description
This field displays a Work Order Description which can be modified as required

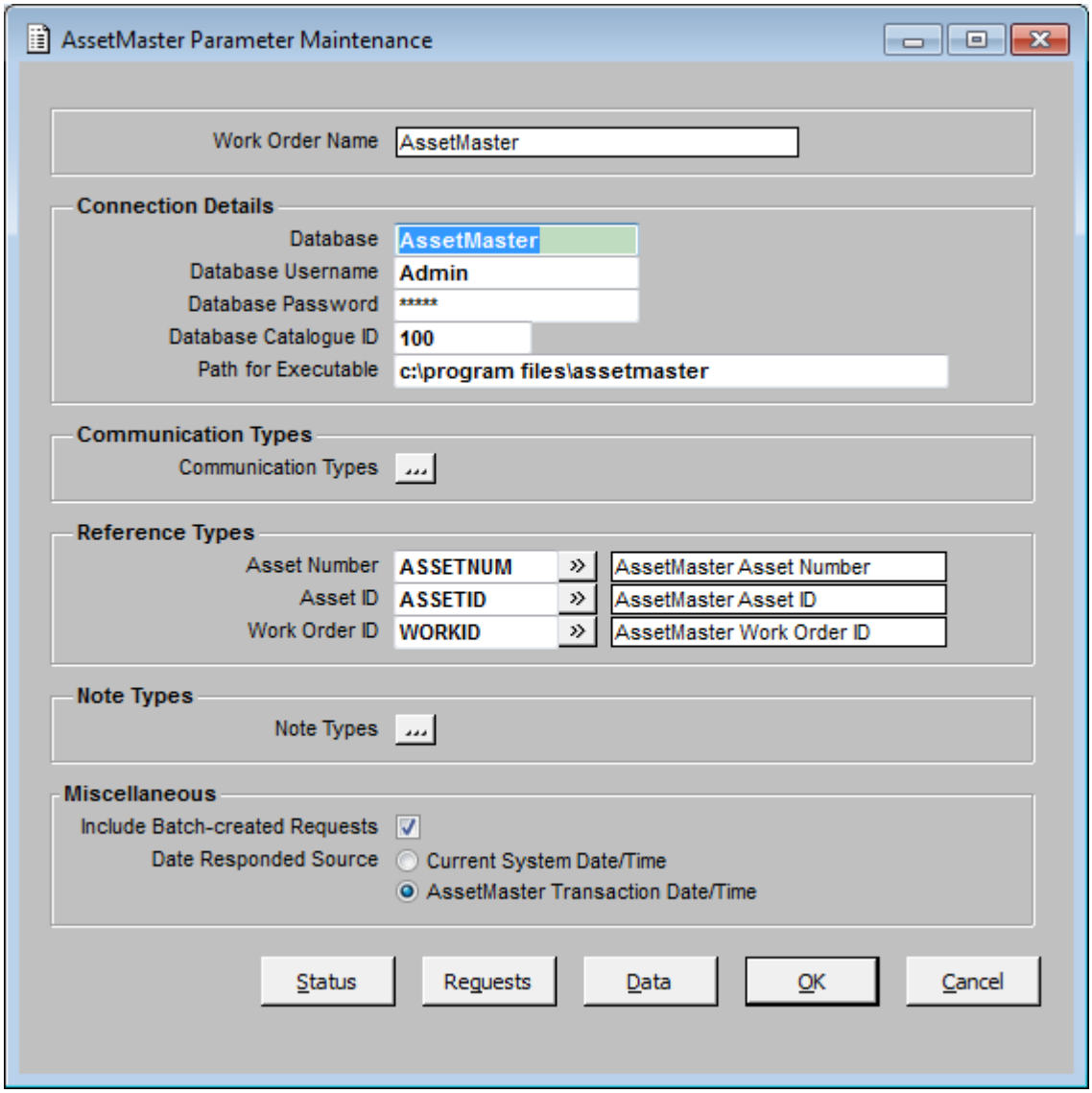
Active
This flag will indicate if this financial interface is active

Directory Path
This field will hold the Path for an executable where required.

Parameters
This field will be visible if parameters have been defined

More button
This button is used to access the AssetMaster interface parameters

AssetMaster Parameter Maintenance



Connection Details - Database
This field is for database name for the interface

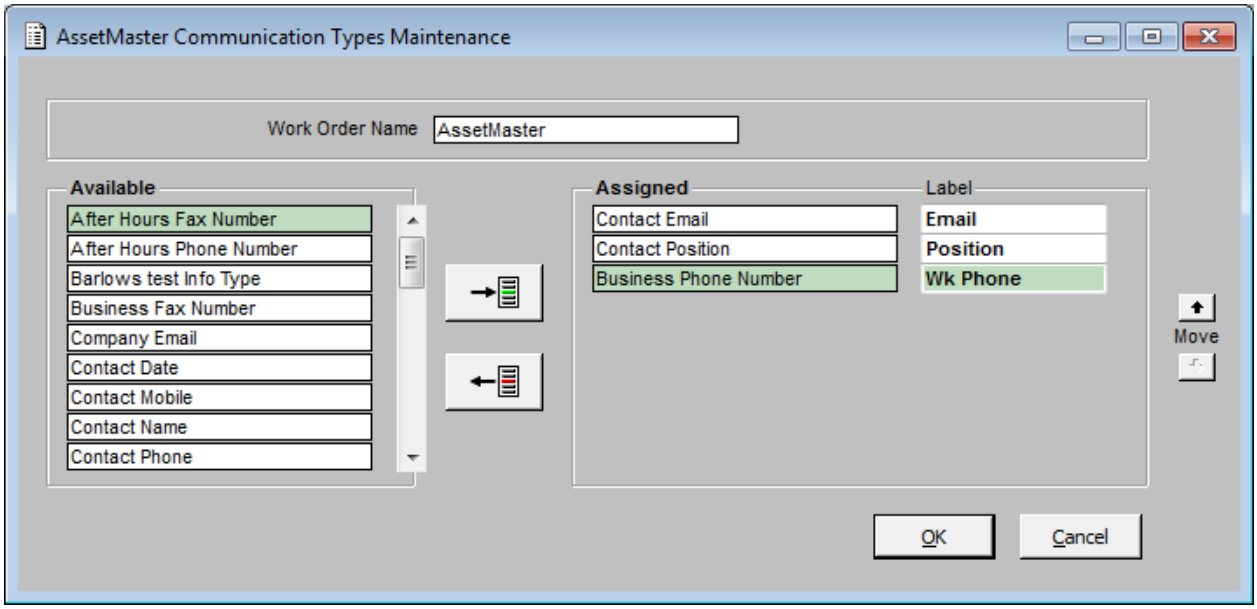
Connection Details - Database Username
This is the user name for the interface

Connection Details - Database Password
This is the user password for the interface

Connection Details - Database Catalogue
This field is the database catalogue id

Connection Details - Path for Executable
This field is the Path for the Executable

Communication Types
This option triggers a form that you can use to assign the Communication Types that you want to interface to AssetMaster



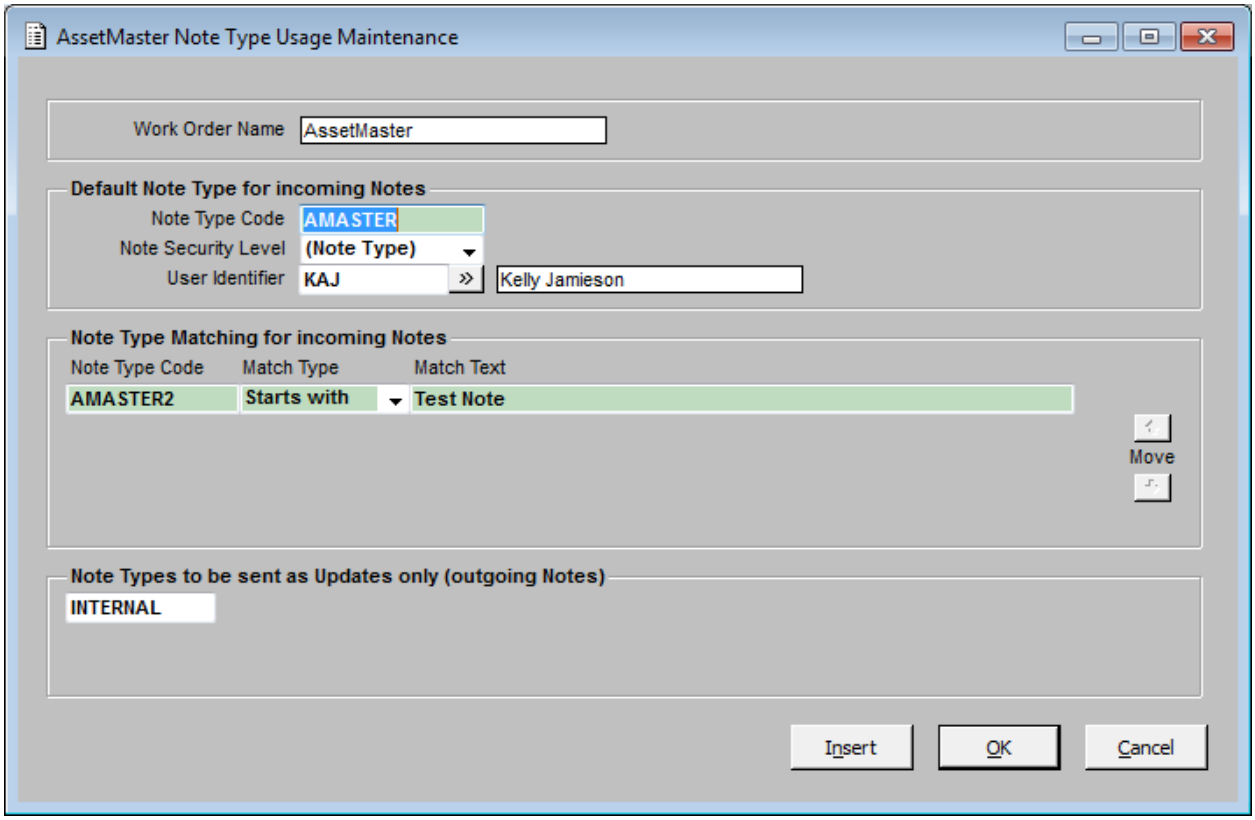
A number of Customer Service Reference Types need to be defined for AssetMaster

Reference Types – Asset Number
This field is to display the Reference Type that will be populated with the AssetMaster Asset Number

Reference Types – Asset ID
This field is to display the Reference Type that will be populated with the AssetMaster Asset ID

Reference Types – Work Order ID
This field is to display the Reference Type that will be populated with the AssetMaster Work Order ID

Note Types
This option triggers a form that you can use to define the note parameters for both inbound and outbound notes



Default Note Type for incoming Notes
This section defines the default Pathway note type used for note passed from AssetMaster back to the Pathway Request.

Note Type Matching for incoming Notes
This section defines the Pathway note type used on a note passed from AssetMaster back to the Pathway Request that matches the match text criteria.

If the inbound note text matches the match text criteria and:

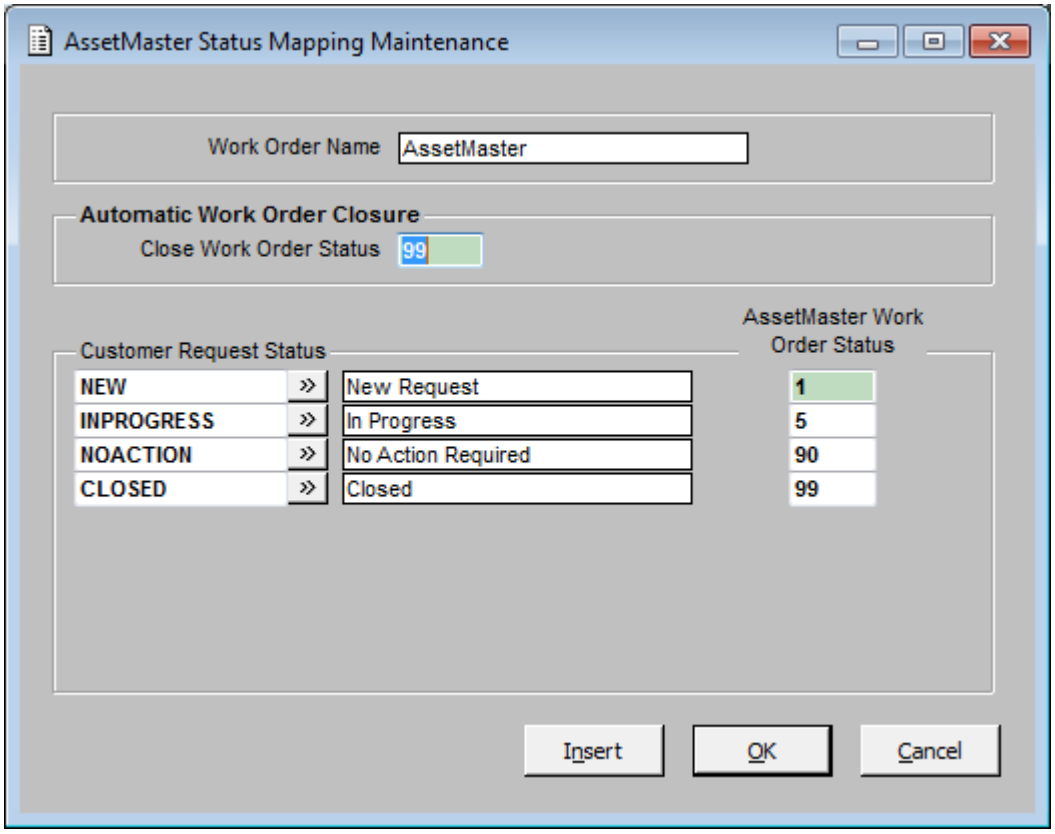
- the Note Type defined in this section does exist on the Request Type, the Default Note Type for AssetMaster will be used

- if the Default Note Type for AssetMaster does not exist on the Request Type, the Request Type's Default Note type will be used.

Note Types to be sent as Updates only (outgoing Notes)
This section used to indentify Pathway Note Types will only be sent to AssetMaster via the NOTE field on the CIFAMNT table, and will not be sent in the NOTE field on the AMS_WKO_EXT table.

Miscellaneous
This section is used to define other miscellaneous parameters

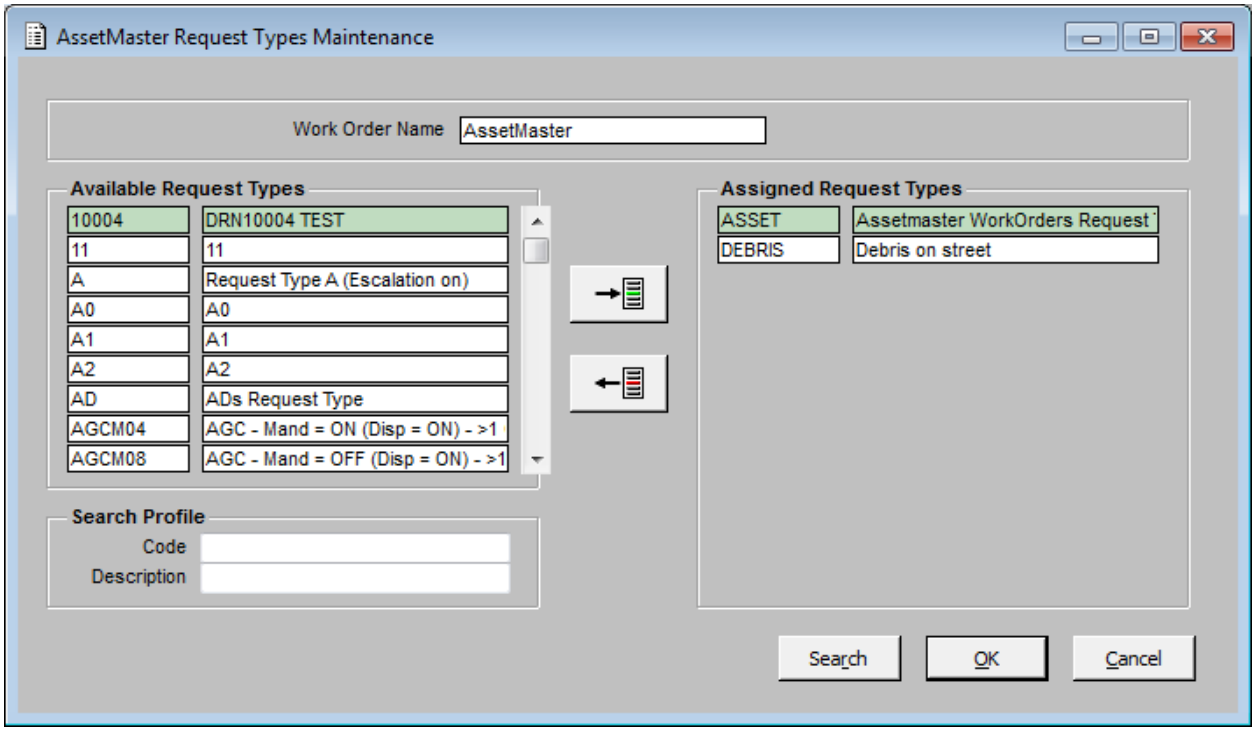
Status button
This button triggers a form that you can use to define the Pathway and AssetMaster status mapping



Close Work Order Status
[Optional] This field is used to indicate the AssetMaster status code to be sent when automatically closing the Work Order on a change of Request Type to a non-AssetMaster type. If null, no status code update will be sent to AssetMaster

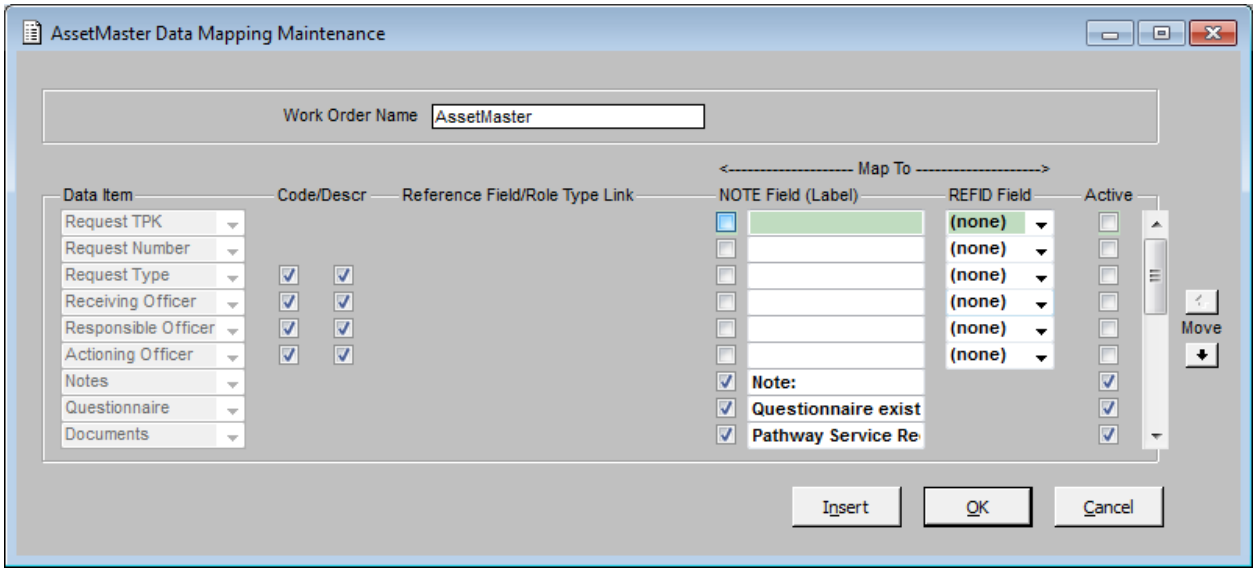
Customer Request Status
This section is used to map the Pathway Status to AssetMaster statuses. Please note – the AssetMaster Status are only sample data.

Requests button
This button triggers a form that you can use to define the Request Types required to interface to AssetMaster



Data button

This button triggers a form that you can use to define the Pathway and AssetMaster data mapping



AssetMaster Work Order Input Control

The AssetMaster Work Order Input Control form (accessed via the *Customer Service* ► *Batch Functions*► *AssetMaster Input Interface* menu option) has been modified to allow the Pathway User to whom e-mail notifications from the Asset Management interface to inherit the Pathway User nominated in the Customer Service System Parameters as the default:-

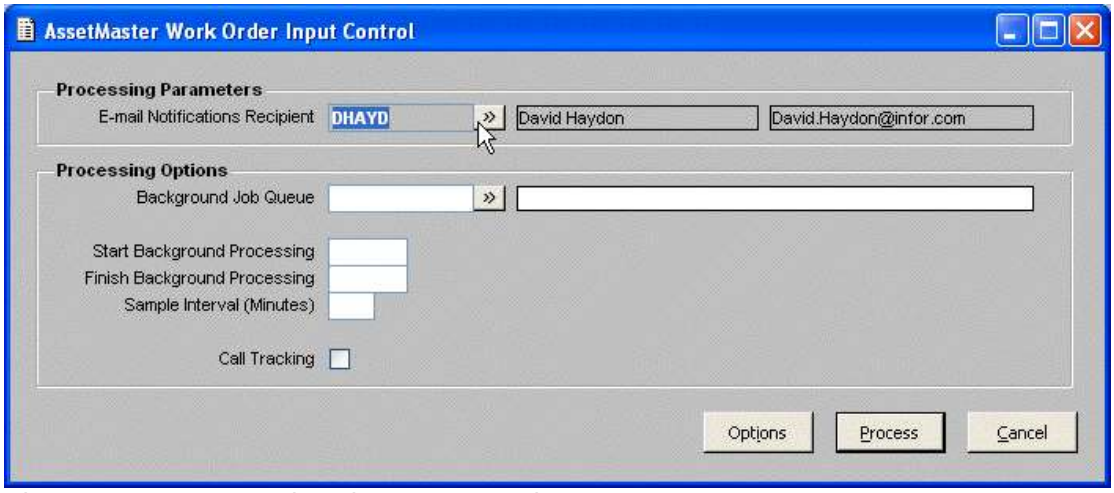


Fig 2: AssetMaster Work Order Input Control

The *Email exception message to User* field (in the Processing Parameters area frame) has been relabelled *E-mail Notifications Recipient*. If no Pathway User has been nominated on this form, the User nominated in the Parameters will be displayed as the default (the *E-mail Notifications Recipient* fields will be displayed with a darkened background colour to indicate that the default value has been applied). The associated pop-up button provides access to the standard User Pop-up form to allow the selection of the nominated User. (Note that the pop-up form will only display Pathway Users that have an e-mail address defined.) If a User other than the default User is selected, the *E-mail Notifications Recipient* fields will be displayed with a white background.

Hansen and AssetMaster interface enhancement for Release 3.05

The Hansen and AssetMaster interfaces have been enhanced to retry an update to a Pathway Customer Service Request received from the interface that failed because the Request was locked by an interactive Pathway user.

Such failures were not notified to the user, and the update was lost.

Each update that fails due to the Request being locked is now notified to a nominated Pathway User by e-mail, and the update request will be flagged for reprocessing.

Hansen

The background process will now check via the Customer Service Global Interface whether the Request nominated on the incoming update request is locked before attempting to process it. If the Request is locked, a record will be written to the ACREXCP table with the new status field (LOCKSTATUS) set to 'LOCKED_RETRY', and the update will not be attempted. The background process will attempt to process any records with a status of 'LOCKED_RETRY' again on the next pass of the file.

This retry process will continue until the Request is found to be no longer locked and the update is successfully processed (or fails for some other reason). To prevent a plethora of e-mail notifications being sent if retries for the same update request are processed in quick succession due to light

incoming traffic, a notification will not be sent if the previous notification for the same update request was sent within the last 15 minutes.

AssetMaster

The background process will now check via the Customer Service Global Interface whether the Request nominated on the incoming update request is locked before attempting to process it. If the Request is locked, the status (INT_STATUS field on the table CIFAMNT) of the incoming update request will be set to 'LOCKED_RETRY', and the update will not be attempted. The background process will attempt to process any records with a status of 'LOCKED_RETRY' again once it has finished processing the current incoming XML document, and again the before proceeding to process any new update requests from the next incoming XML document.

This retry process will continue until the Request is found to be no longer locked and the update is successfully processed (or fails for some other reason). The ACREXCP record will then be deleted. To prevent a plethora of e-mail notifications being sent if repeated retries for the same update request are processed in quick succession due to light incoming traffic, a notification will not be sent if the previous notification for the same update request was sent within the last 15 minutes.

E-mail Notifications

All e-mail notifications generated from the Hansen interface will be sent to the Pathway User nominated in the Customer Service System Parameters. If no Pathway User is nominated, no e-mail notification will be sent.

All e-mail notifications generated from the AssetMaster Interface will continue to be sent to the Pathway User nominated on the AssetMaster Work Order Input Control form: however, if no Pathway User is nominated, the Pathway User nominated in the Customer Service System Parameters will be used by default (if no Pathway User is nominated in the Customer Service System Parameters, no e-mail notification will be sent).

Customer Service System Parameter Maintenance

The Customer Service System Parameter Maintenance form (accessed via the *Customer Services >> Parameters >> System Parameters* menu option) includes an "Assets" Asset Management Interface section:

"Assets" Product Code
This field is the Asset Management Product code used (e.g. HANSEN, AMASTR)

"Assets" Reference Type
This field is the Reference Type created to store the Asset Management Product key

E-mail Notifications Recipient
This field is used to nominate a Pathway User to whom e-mail notifications from the Asset Management interface should be sent. The user must have a defined email address in Pathway.

The example below show a setup for Hansen (Product Code = HANSEN and Reference Type = COMPKEY). The "Assets" Asset Management Interface section label has been replace with "Hansen" via *Customer Service >> Parameters >> User Defined Label Maintenance)*.

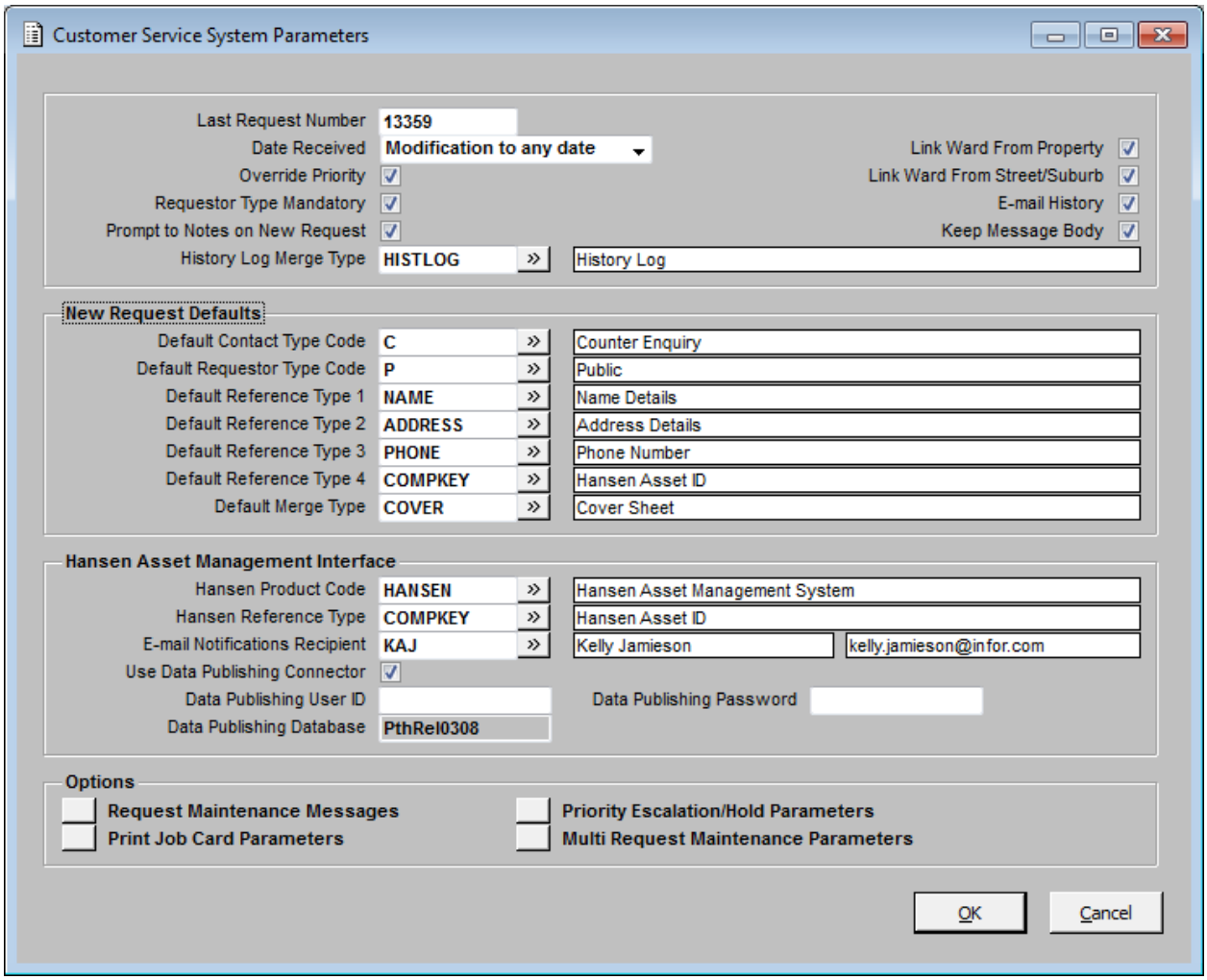


Fig 1: Customer Service System Parameters

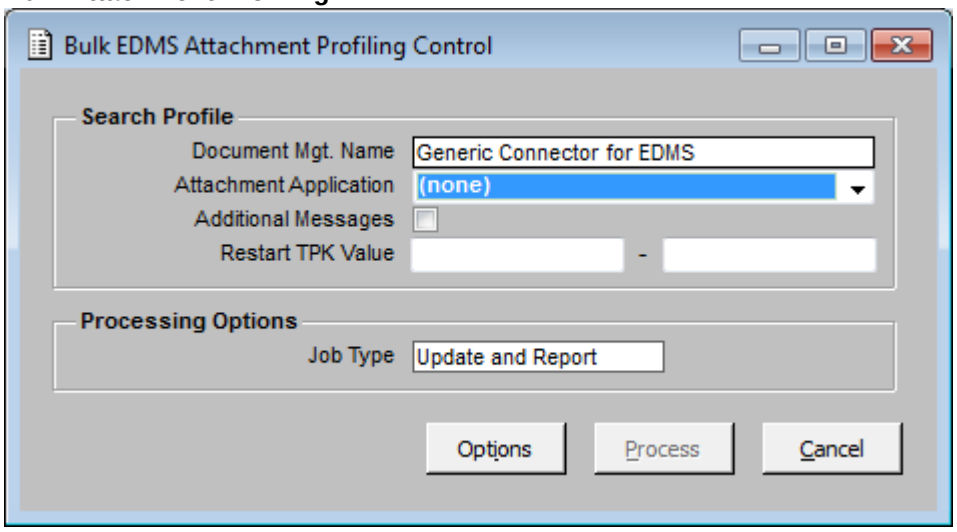
The Asset Management Interface area frame now contains a new field labelled *E-mail Notifications Recipient*. The associated pop-up button provides access to the standard User Pop-up form to allow the selection of the nominated User. (Note that the pop-up form will only display Pathway Users that have an e-mail address defined.)

Document Management Parameters

Document Management System Housekeeping

Generic EDMS

Bulk Attachment Profiling



This option is used to register paperclip attachments into an EDMS in bulk. This process can only be run if you're licenced for document management integration and the chosen Pathway module is flagged for document integration.

Document Mgt. Name
Displays the Document Management Product set for document management integration.

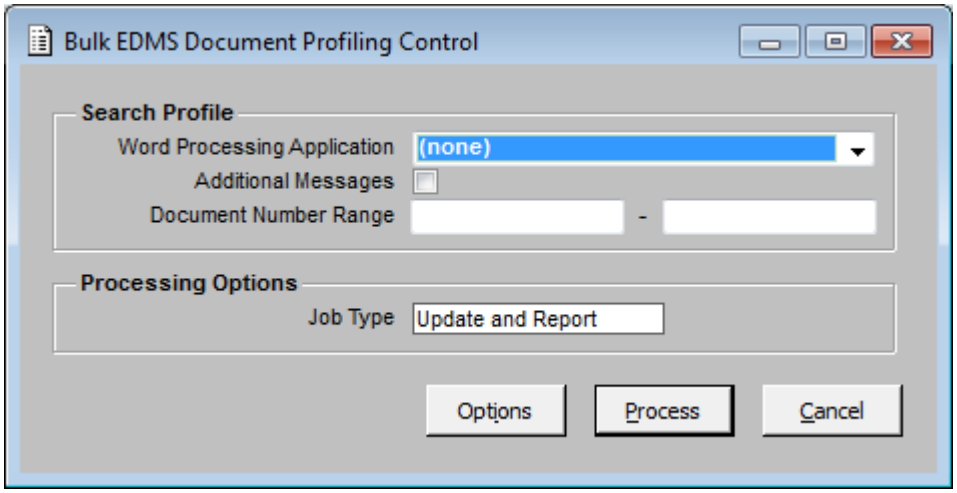
Attachment Application
Select the Pathway module you wish to run this process for. It will only list the Pathway modules that are flagged for document management integration

Additional Messages
Tick this flag is your wish to display additional messages on the Exception Report generated by this process.

Restart TPK Value
It is recommended to run this process in small batches using a paperclip attachment TPK range (i.e. TPKCDCDDLNK)

Processing Options – Job Type
The Job Type is set to 'Update and Report' and cannot be modified

Bulk Document Profiling



This option is used to register Pathway generated documents into an EDMS in bulk. This process can only be run if you're licenced for document management integration and the chosen Pathway module is flagged for document integration.

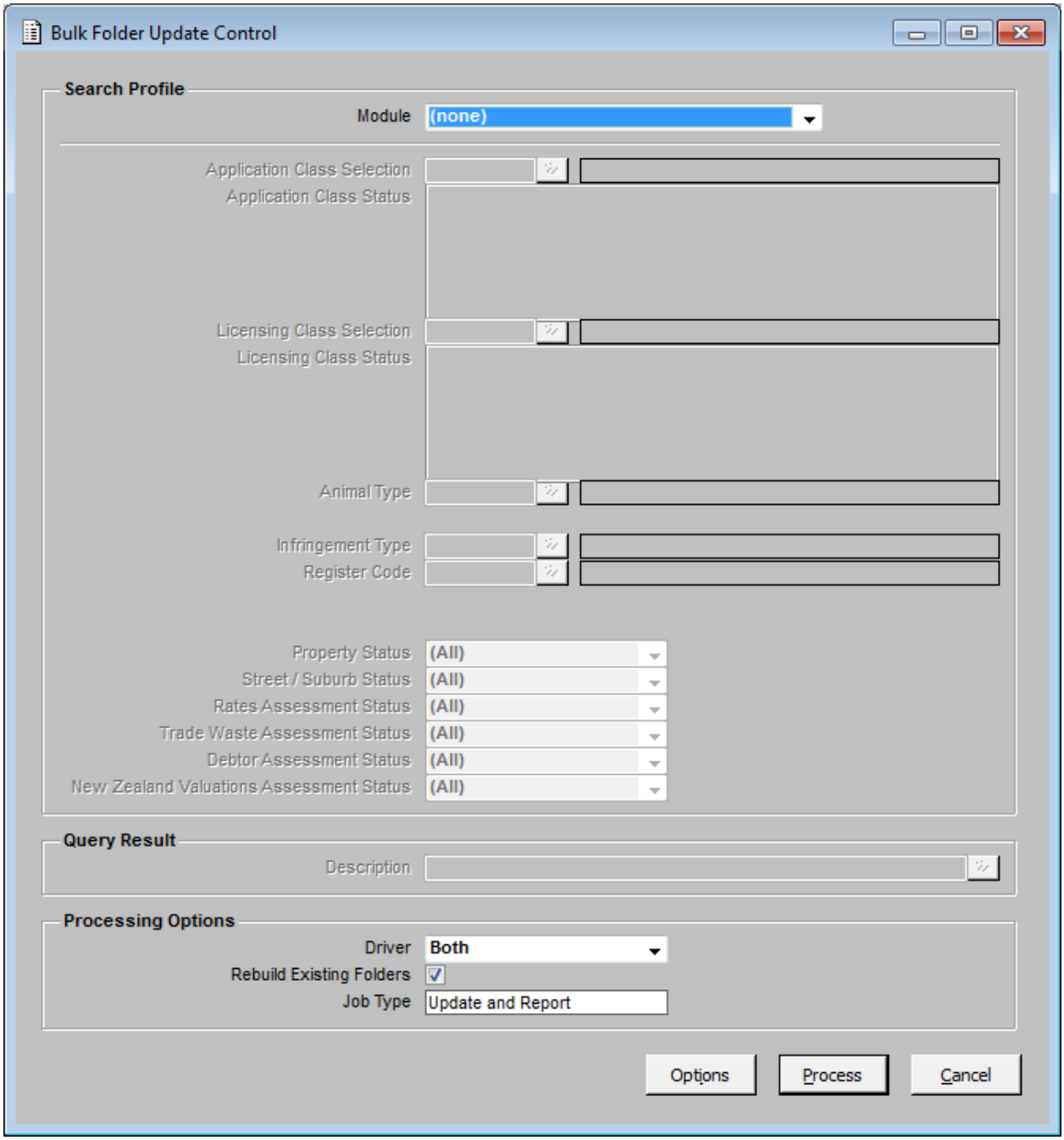
Word Processing Application
Select the Pathway module you wish to run this process for. It will only list the Pathway modules that are flagged for document management integration

Additional Messages
Tick this flag is your wish to display additional messages on the Exception Report generated by this process.

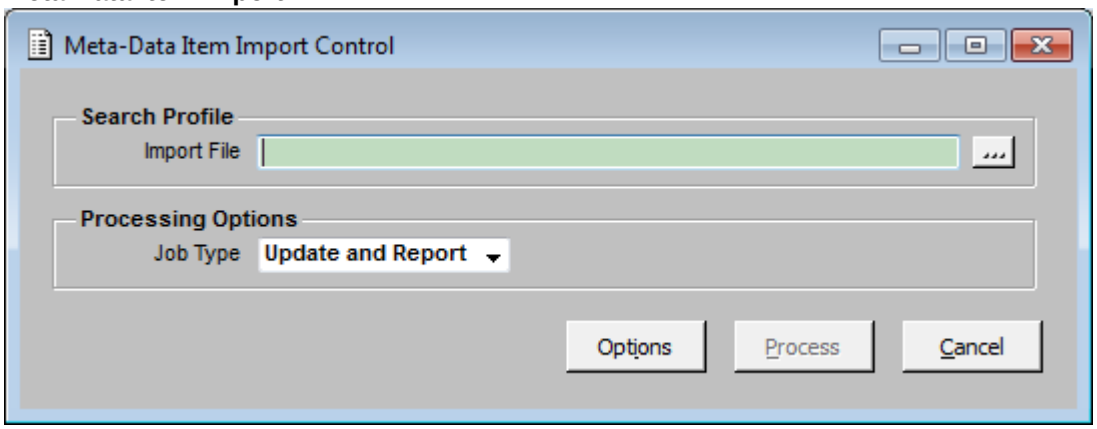
Document Number Range
It is recommended to run this process in small batches using a document number range (i.e. TPKCWPPDOC)

Processing Option – Job Type
The Job Type is set to 'Update and Report' and cannot be modified

Bulk Folder Update



Meta-Data Item Import



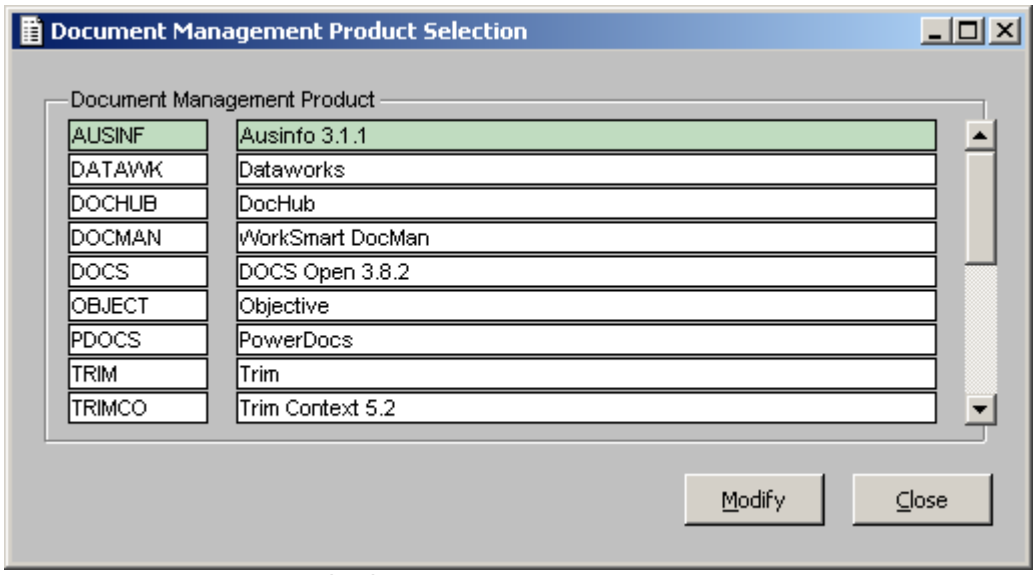
Hummingbird DM5

Trim Context 5.2

Document Management Product Parameters

Use this option to define your document management integration parameters for an available Document Management Products.

Document Management Product Selection

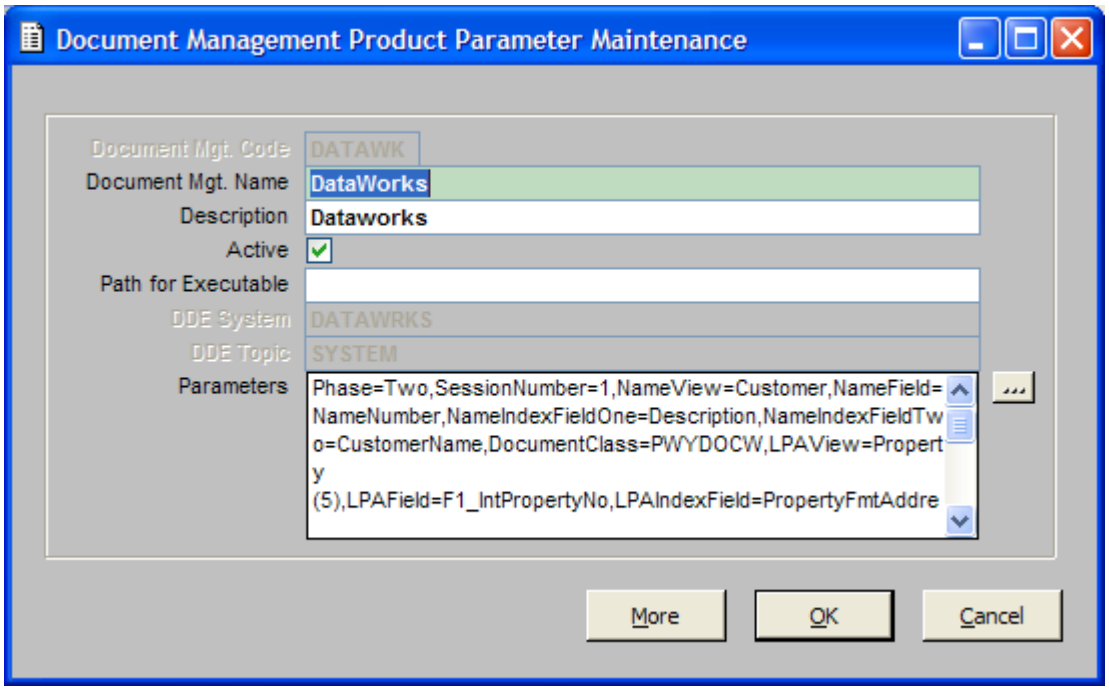


Document Management Selection Form

Document Management Product
The list of available Document Management Products will be listed here. Click on Modify to define the required parameters to activate the interface.

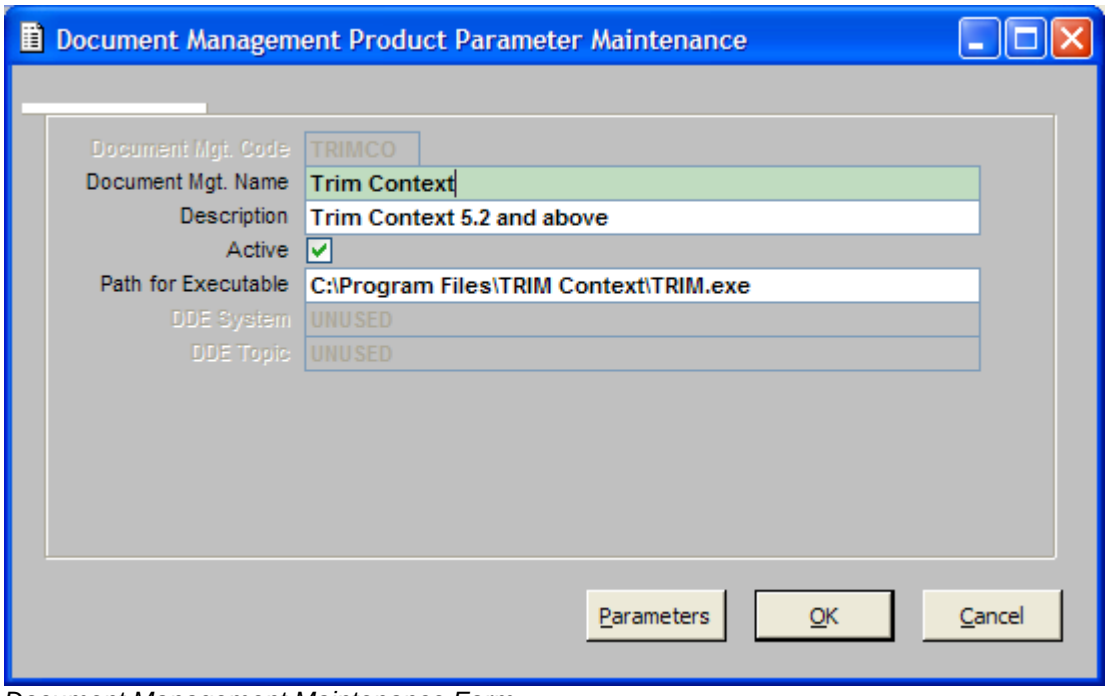
Document Management Product Parameter Maintenance

Sample of ECM/Dataworks Parameter Settings



Document Management Maintenance Form

Sample of Trim Context Parameter Settings



Document Management Maintenance Form

Document Mgt. Name
This field will contain the Name for the Document Management Product. The % represents the Shortcut key.

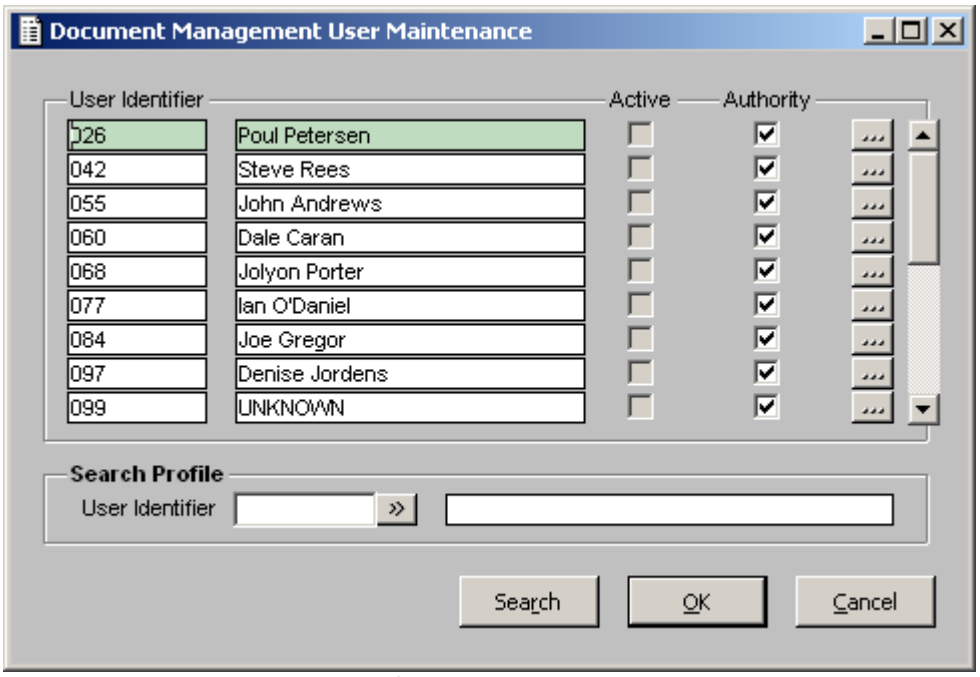
Description
This field will contain the Description for the Document Management Product

Active
The Active check box will indicate if this Document Management Product is currently active.

Path for Executable
Enter the path for your Document Management Product. The entire path and executable should be entered where applicable.

Parameters
The Parameters section of the form will display if parameters that have been defined. This area is not maintainable from this form. You will need to use the 'Detail' button to maintain these details.

Document Management User Maintenance



Document Management User Maintenance Form

The Document Management User Maintenance Form is used to control the access of users to the Document Management Functions within Pathway.

Each user will appear here and they can then be granted or denied Authority to Document management. You can then use the detail button to further refine the level of authority for each user.

User Identifier

The User Identifier for each Pathway User will be displayed here. The Search facility at the bottom of the screen can be used for ease of locating the required User ID.

Authority

This check box should be ticked on if this user is to have access to the Document Management interface from within Pathway. The level of access and which modules are available is controlled on the Document Management User Application Maintenance Screen.

Detail Button

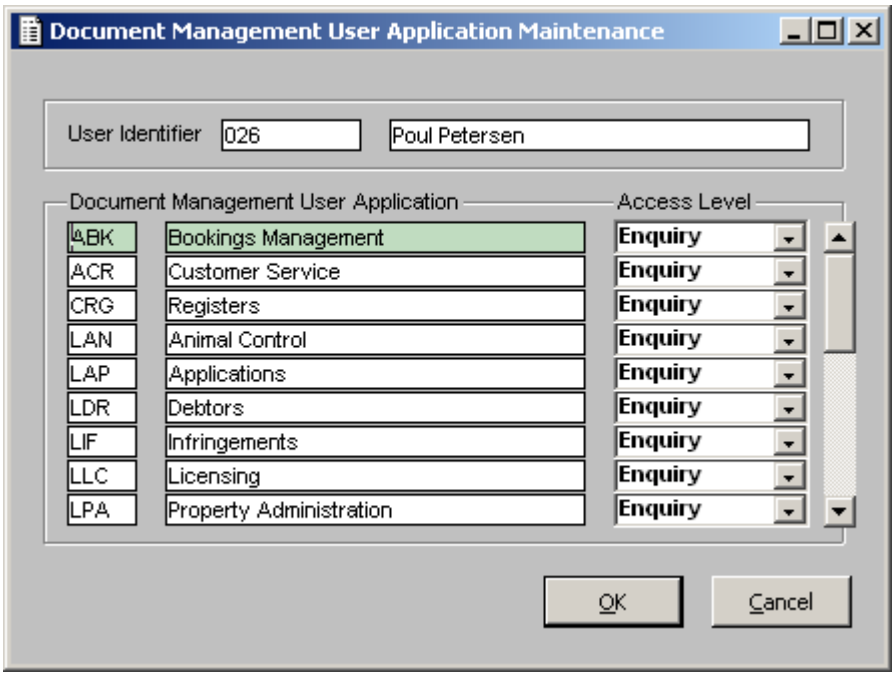
Use the detail button to access the Document Management User application Screen. This Screen is used to further refine the available authority for the selected User ID.

Search Profile

User Identifier

Enter the User Identifier and click on search to locate the required record for maintenance.

Document Management User Application Maintenance



Document Management User Application Maintenance Form

The Document Management User Application Maintenance Form is used for defining the level of authority for those users who have been granted access to the Document Management Interface.

Document Management User Application
The available Module interfaces are displayed on this screen. At present the following Modules may be in interfaced to the Document Management System. All modules will be displayed here, irrespective if they relate to councils Document Management system.

Access Level
This parameter will set the level of access that users will have within Pathway when accessing details from the Document Management System. Available choices are

NONE
Enquiry
Maintenance

This allows a user to have access to Property but not applications for example.

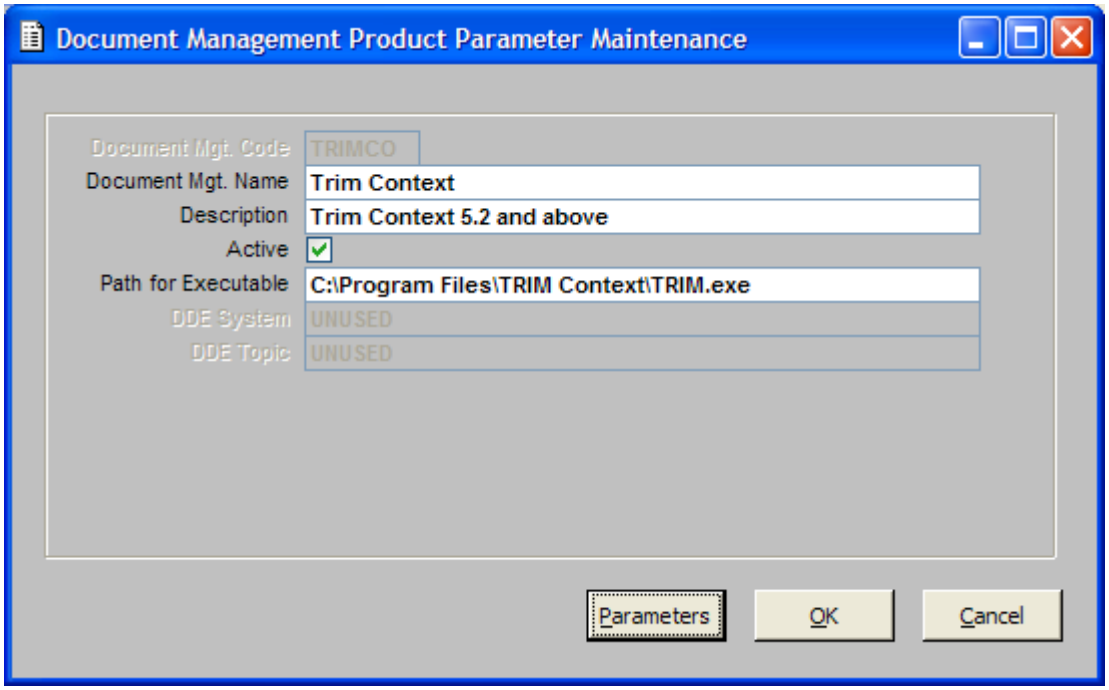
TRIM CONTEXT Interface

TRIM CONTEXT Interface

This document covers the requirements for setting up the interfacing between Pathway and TRIM based on requirements within Pathway.

Trim Context Interface

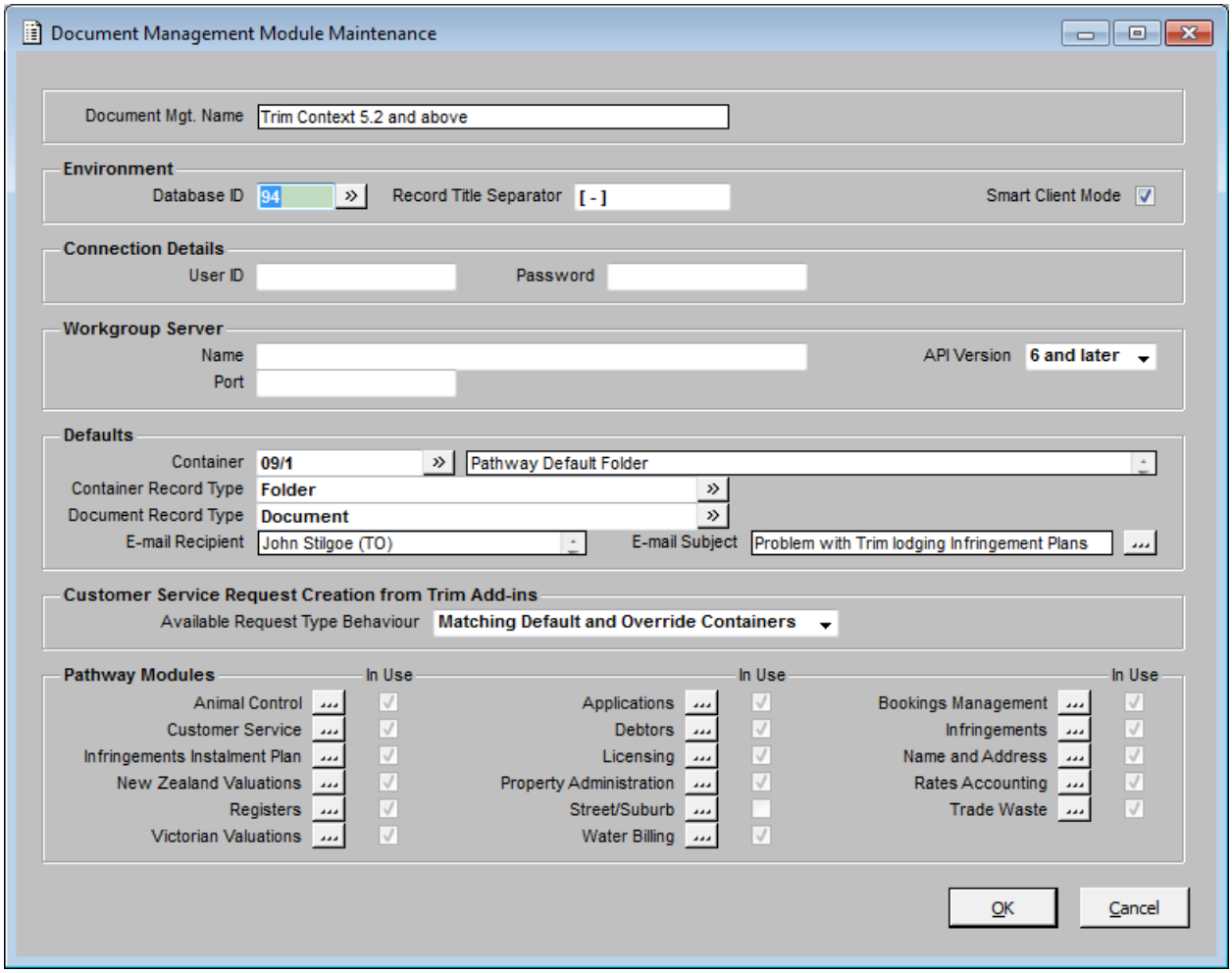
Below are details of all parameters required to be reviewed and/or set up to enable the interfacing between Pathway and TRIM.



Document Management Product Parameter Maintenance

Document Management Parameters
Select this button to enable access to the detailed parameter settings required for interfacing Pathway and Trim.

Document Management Module Maintenance
This form enables the user to define the defaults relevant to the setting up of Trim such as titling, keywords, container and document types.



Document Management Name
This is the description of the Document Management system – it is non-maintainable from here.

Document Management – Environment – Database ID
This is the ID number of the database – it will normally be set by your IT Department and should not be altered without their approval.

Document Management – Environment - Record Title Separator
This character is used between any words generated for the title.

Document Management – Environment - Smart Client Mode
If your site is using the Smart Client (Web Enablement) then this flag should be set ON.

Document Management – Connection Details - User Id
The Connection Details will be used where present. The TRIM ID and Password entered here needs to be a user with appropriate authority in TRIM. Where the User ID and Password are not entered, the PC User will to log into TRIM (if valid TRIM user).

Document Management – Connection Details – Password
The Connection Details will be used where present. The TRIM ID and Password entered here needs to be a user with appropriate authority in TRIM. Where the User ID and Password are not entered, the PC User will to log into TRIM (if valid TRIM user).

Document Management – Workgroup Server – Name
Only set this to your TRIM Workgroup Server Name if you have server redirection OFF (System Administration >> Integration >> System Parameter Maintenance >> Server Integration Management

>> TRIM >> Redirection Active is un-ticked) and you have the TRIM client installed on your Pathway Application Server(s) and it needs to reference a TRIM Workgroup Server elsewhere.

Document Management – Workgroup Server – Port
Only set this to your TRIM Workgroup Server if you have server redirection OFF (System Administration >> Integration >> System Parameter Maintenance >> Server Integration Management >> TRIM >> Redirection Active is un-ticked) and you have the TRIM client installed on your Pathway Application Server(s) and it needs to reference a TRIM Workgroup Server elsewhere. The Port Number set during installation is normally 1137 and will display when the Workgroup Server Name is entered.

Document Management – Workgroup Server – API Version
By default this is set to API Version = '6 and later'. Do not change this unless your smart client Pathway/Trim document integration is to Trim Context v5.2 (API Version = 5.2).

In the instance where a document cannot be registered to its' correct location, Pathway will register the document to the nominated Default folder and issue an e-mail to advise that the default container details were used. The e-mail issued is user defined and may be issued to multiple people.

Document Management – Defaults - Container
Using the Pop-Up function, select the required TRIM Container. This will be the default container used for registering Pathway Documents when the Container parameters have not been defined at the Application level. This MUST be entered.

Document Management – Defaults – Container Description
This is the description of the Container – it is not able to be maintained here.

Document Management – Container Record Type
Using the Pop-Up function, select the required TRIM Container Record Type. This will be the default Container Record Type used when parameters have not been defined at the Application level. This MUST be entered.

Document Management – Document Record Type
Using the Pop-Up function, select the required TRIM Document Record Type. This will be the default Document Record Type used when parameters have not been defined at the Application level. This MUST be entered

** For security reasons it is an Infor Recommendation that a separate Document Type be used for Pathway Documents.

Document Management – E-mail Recipient
Using the details button, create an e-mail message to be used and assign recipients. This Default information will be used by Pathway when the system is unable to determine where a document should be registered. In the instance where the default container and associated details are used, then the e-mail as defined will be sent to those nominated recipients advising that the Default details were used. Action will then be required within TRIM to ensure that the document is moved to the correct container.

Document Management – E-mail Subject

The detail out button allows the entry of the subject to advise the relevant person(s) that manual intervention is required.

Pathway Modules

Use the details buttons alongside each module to set up the individual module details.

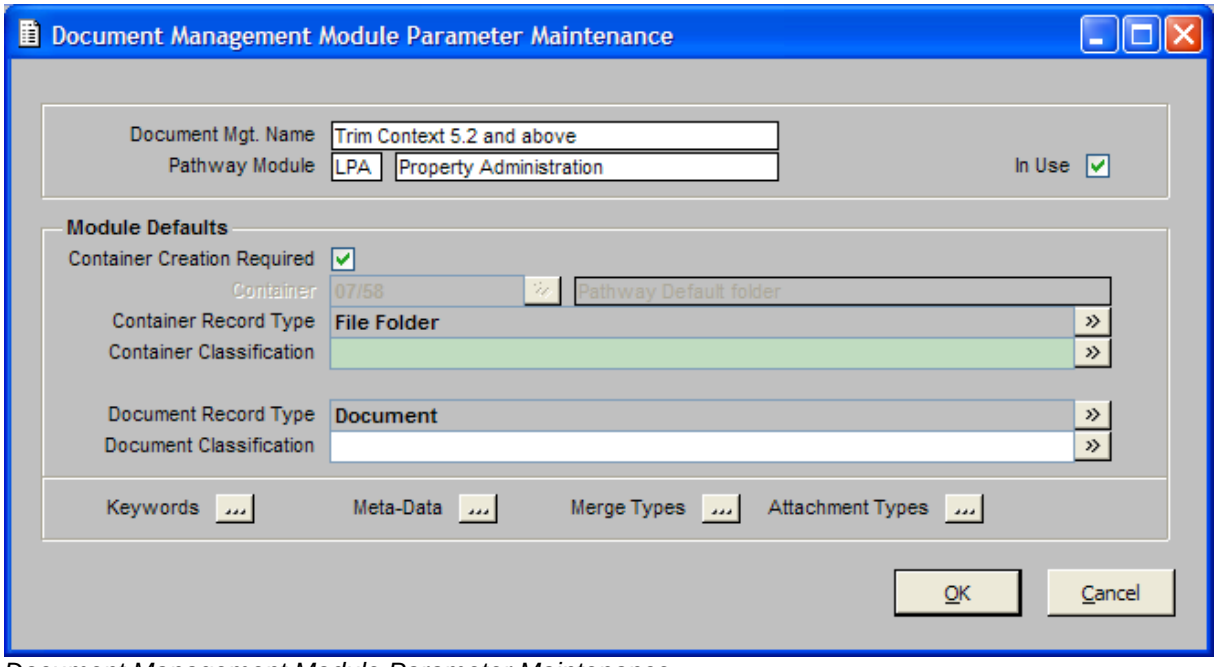
Module Control

Control Module and TRIM Integration

The Module can be integrated with TRIM Context. Letters will be registered into a Container or 'Functional folder' within TRIM Context. The functional folder may be nominated at the module level, or further defined for each Class, Type and/or Merge Type.

Regardless of where a document is registered within TRIM Context, the ability will exist to locate these documents via the use of various User Defined fields and other search criteria within TRIM Context.

Control Document Management Module Parameters



Document Management Module Parameter Maintenance

Document Management Module – Name
Description of the Document Management - this is non maintainable here.

Document Management Module – Pathway Module
Selected Module – this is non-maintainable here.

Document Management Module – Pathway Module Description
Selected Module Description – this is non-maintainable here.

Document Management Module – In Use
Ensure that the In Use Flag is checked on to allow the Document Management interface to occur between Pathway Animals and TRIM Context. Where a site DOES NOT wish to have integration with TRIM, this 'In Use' flag should be checked OFF.

Document Management Module – Module Defaults - Container Creation Required

Container Creation required should be checked 'ON' if council require Pathway to create a separate container for each Module Record that exists and for each new Module Record created within Pathway. When a new Module Record is created and a document generated, Pathway will create a new Module Record container for that document using the keywords and titling information as specified.

If council requires ALL Module Record documents to go to one container or functional folder, then this parameter should be set 'OFF'

Please Note – this function is not available for the following modules:

Animals
Trade Waste
Infringements
New Zealand Valuations
Registers
Bookings
Customer Service
Victorian Valuations

Document Management Module – Module Defaults - Container
The Default Container will show here when first accessing this form. A default Module container should be defined here. The Container can be further defined at the Module Type and Merge Type level. Where the container is NOT nominated at this level, the default module level container will be used.

Please note – this function is not available for the following modules:
Licencing
Rates
Applications
Debtors
Property
Water Billing

Document Management Module – Module Defaults – Container Title
This is the title of the selected Container – this is not maintainable here.

Document Management Module – Module Defaults – Container Record Type
This is the TRIM Container Record Type.

Document Management Module – Module Defaults – Container Classification
This is the TRIM Container Classification.

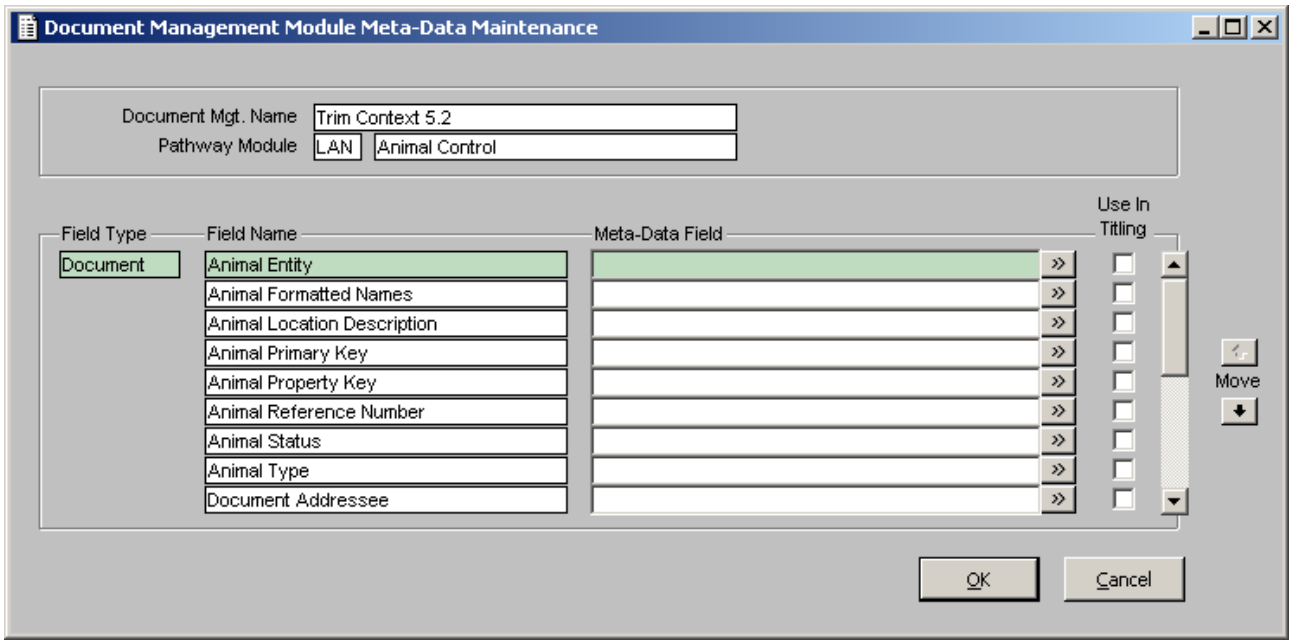
Document Management Module – Module Defaults – Document Record Type
Using the popup button at the end of the Document record Type field will initialise the TRIM Context 'Select From all Record Types' form. From here the required Document Record Type can be selected. eg Pathway Document.

** For security reasons it is an Infor Recommendation that a separate Document Type be used for Pathway Documents.

Document Management Module – Module Defaults – Document Classification
Using the popup button at the end of the Document Classification field will initialise the TRIM Context 'Select From Classifications' form. From here the required Document Classification can be selected. eg Animal Control

Document Management Module Keyword Maintenance Form

Meta-Data



Document Management Module Meta-Data Maintenance Form

This form provides council with the opportunity to map the Pathway fields to the TRIM Context Meta-Data Fields. This is available at the Container and the Document Level. Click on the popup at the end of each line will invoke the TRIM Context selection form for User Defined Fields.

Within the smart client, an exception message was displayed whenever a metadata field value of more than 255 characters was passed to Trim while registering a new record. A recent development now automatically truncates the Customer Service 'Document Summary' field value (i.e. the Request's initial note) for Trim when it exceeds the maximum allowable length of 255 characters. The same logic will be applied to other meta-data fields in future.

Document Management Module Meta-Data Maintenance

Document Management Module Meta-Data Maintenance – Document Management Name
This is the name of the Document Management System – this is not maintainable here.

Document Management Module Meta-Data Maintenance – Field Type
This is the Description of the Field Type – this is not maintainable from here.

Document Management Module Meta-Data Maintenance – Field Name
This is the Pathway Field Name – this is not maintainable from here.

Document Management Module Meta-Data Maintenance – Meta-Data Field
The Metadata fields can be retrieved from TRIM by using the popup function at the end of each line. This will provide the operator with a list of fields that are available for selection. If this data is not required, then the Meta-Data field may be left blank.

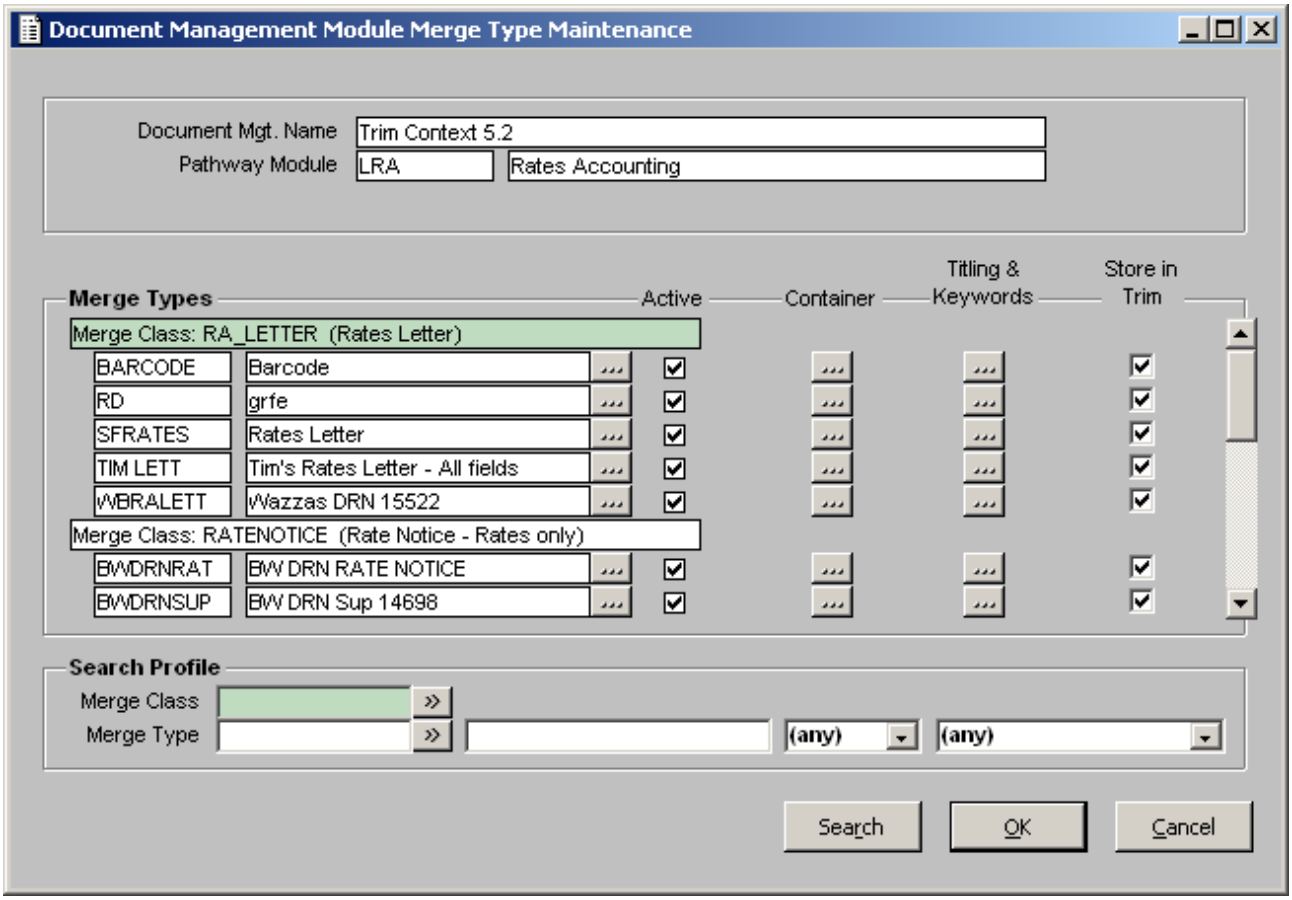
***** Tip – If a field is to be used in Titling, you MUST nominate a Meta-data field.***

Document Management Module Meta-Data Maintenance – Use in Titling
The Use in titling checkbox should be checked ON for those pieces of Meta-data that council wishes to include in the Container and Document Titles. The move buttons at the right of the screen allow for

these fields to be ordered. The order of the fields on this screen will represent the order that this information will be recorded within TRIM Context.

***** Tip – Use the Move buttons to re-order the fields so that those Fields that are to be used in the Title are sequenced first. This makes it easier when comparing information to Meta-Data at the next Level.***

Document Management Module – Merge Type Maintenance



Document Management Module Merge Type Maintenance Form

The ability exists to set a default container and Titling & Keyword information at the Merge Type Level. This is not mandatory, and where these details do not exist, this information will be sourced from the Class or Module level.
To enter the Information, click on the check box for the required Merge Type and enter the required details.

Document Management Module Merge Type Maintenance – Document Management Name
This is the Description of the Document Management system – this is not maintainable from here.

Document Management Module Merge Type Maintenance – Pathway Module Code Name
This is the Pathway Module Code Name – this is not maintainable from here.

Document Management Module Merge Type Maintenance – Pathway Module Code Description
This is the Pathway Module Code Description – this is not maintainable from here.

Document Management Module Merge Type Maintenance – Merge Class
This is the description of the Merge Class – this is not maintainable here.

Document Management Module Merge Type Maintenance – Merge Type Code
This is the relevant Merge Type Code that is linked to the Merge Class – this is not maintainable here.

Document Management Module Merge Type Maintenance – Merge Type Code Description
This is the relevant Merge Type Description of the Merge Type Code – this is not maintainable here.

Document Management Module Merge Type Maintenance – Active Flag
This flag identifies if the Merge Type is currently active.

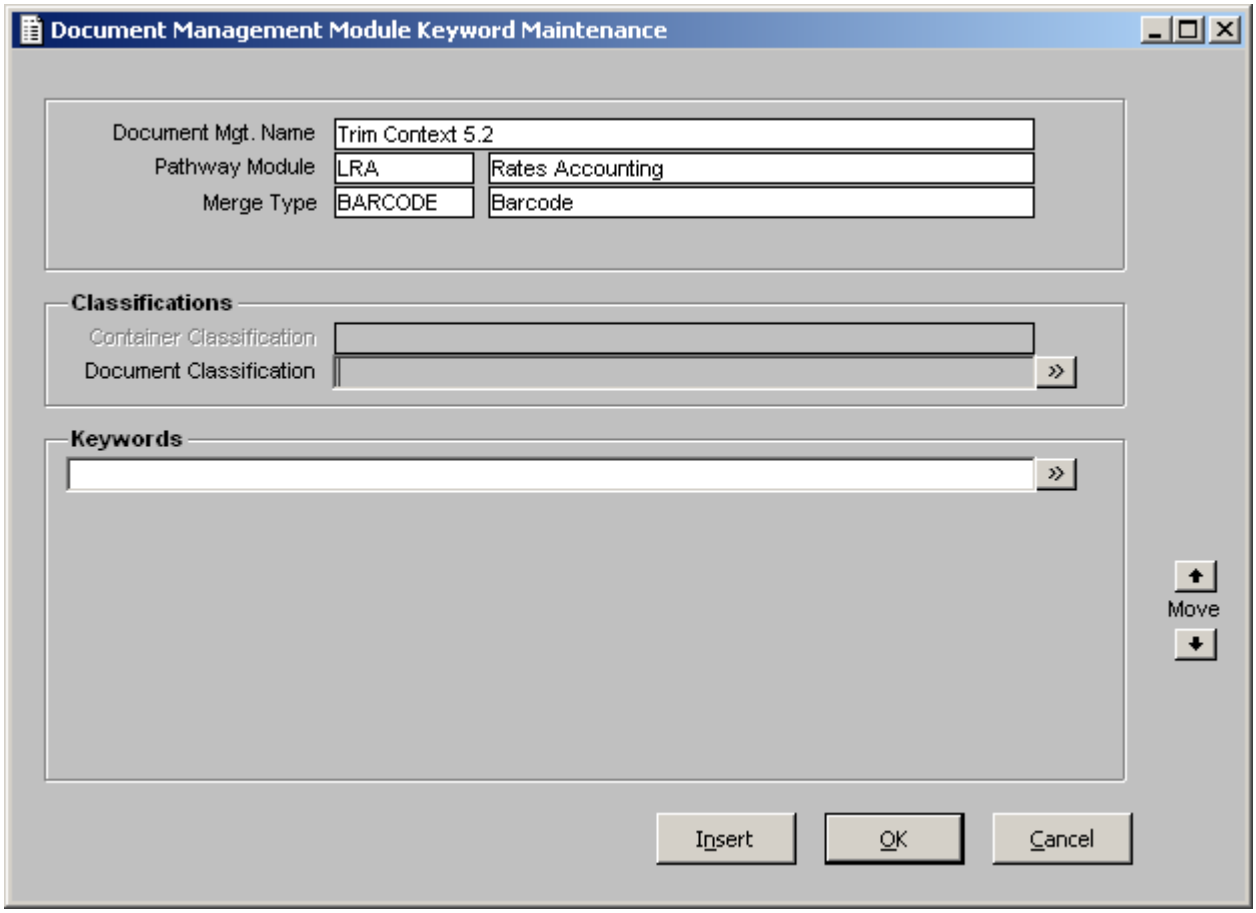
Document Management Module Merge Type Maintenance – Merge Type Code
Selecting this button will take the user to be able to set up the default Module Container.

Document Management Module Merge Type Maintenance – Store in TRIM
The Store in TRIM checkbox will determine whether the final documents generated from each Merge Type will be stored in the TRIM document store or in the normal Pathway Document Storage.

Document Management Module Merge Type Maintenance – Search Profile Merge Class
This search profile allows the user to search for a specific Merge Class; the user may enter in the name of the Merge Class or use the popup button to search for the relevant Class. The wildcard functionality is available with this search.

Document Management Module Merge Type Maintenance – Search Profile Merge Type
This search profile allows the user to search for a specific Merge Type; the user may enter in the name of the Merge Type or use the popup button to search for the relevant Type. The wildcard functionality is available with this search.

Document Management - Titling and Keywords



Document Management Module Keyword Maintenance Form

Classification and Keywords

The Document Classification can be defined here and any number of keywords may be defined. The Keywords will be sourced from the Thesaurus within TRIM. Any number of Keywords may be defined and the move buttons will allow for the keywords to be ordered as required. The order on screen will represent the order within TRIM.

Document Management Module Keyword Maintenance – Document Management Name
This is the name of the Document Management system – this is not maintainable here.

Document Management Module Keyword Maintenance – Pathway Module Code
This is the code of the Pathway Module – this is not maintainable here.

Document Management Module Keyword Maintenance – Pathway Module Name
This is the name of the Pathway Module – this is not maintainable here.

Document Management Module Keyword Maintenance – Module Type Code
This is the name of the Pathway Module Type Code – this is not maintainable here.

Document Management Module Keyword Maintenance – Module Type Description
This is the description of the Pathway Module Type – this is not maintainable here.

Document Management Module Keyword Maintenance – Merge Type Code
This is the Merge Type Code – this is not maintainable from here.

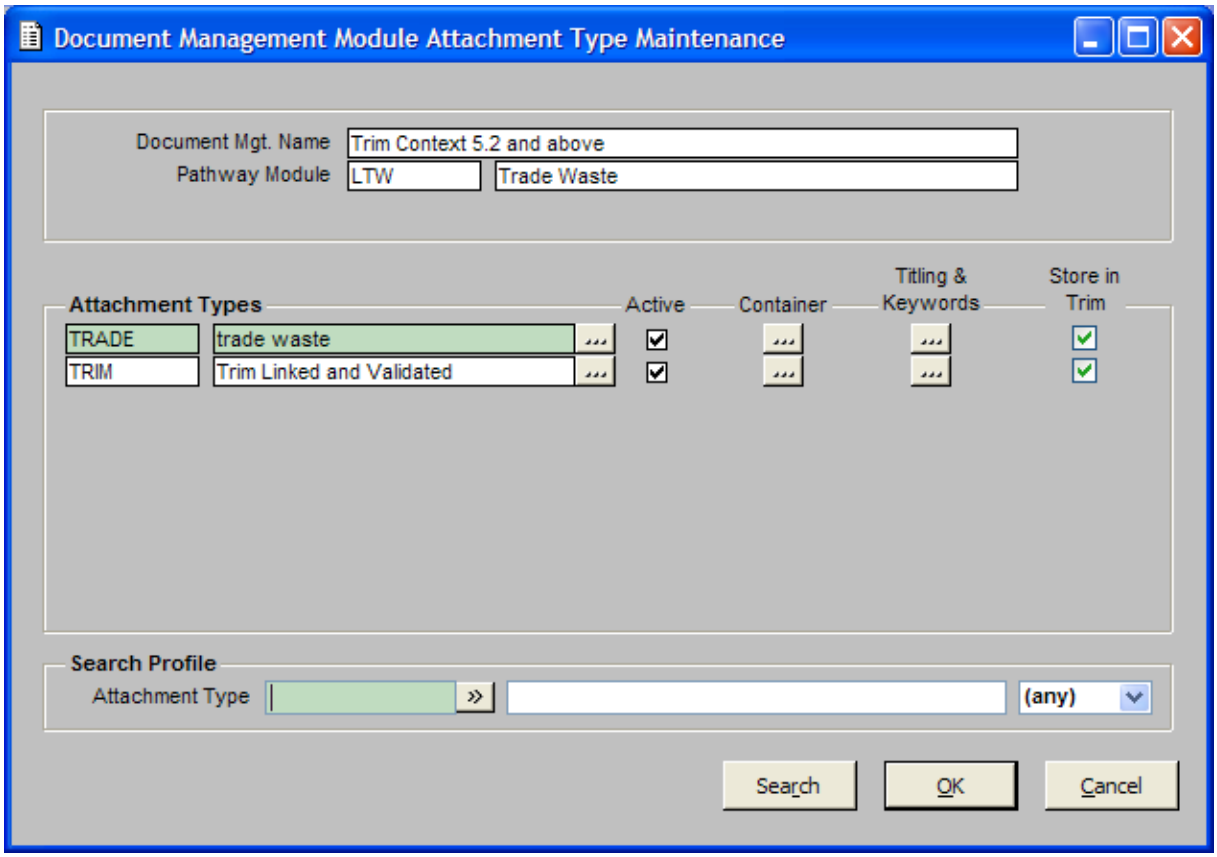
Document Management Module Keyword Maintenance – Merge Type Description
This is the description of the Merge Type Code – this is not maintainable here.

Document Management Module Keyword Maintenance – Keyword
Using the Popup button will initialise the TRIM CONTEXT 'Select from Thesaurus Terms' form. From here select the required Document Keyword. Many Keywords may be inserted onto this form and the sorted into the required order using the Move buttons. The order in which the keywords appear here, will be the order that Pathway will apply them

Document Management Module Keyword Maintenance – Store in TRIM

Document Management Module Attachment Type Maintenance

Document Management Module Attachment Type Maintenance



Document Management Module Attachment Type Maintenance

The ability exists to set a default container and Titling & Keyword information at the Paperclip Attachment Type Level. This is not mandatory, and where these details do not exist, this information will be sourced from the Module level.
To enter the Information, click on the check box for the required Attachment Type and enter the required details.

Document Management Module Attachment Type Maintenance – Document Management Name
This is the name of the Document Management system – this is not maintainable here.

Document Management Module Attachment Type Maintenance – Pathway Module Code
This is the code of the Pathway Module – this is not maintainable here.

Document Management Module Attachment Type Maintenance – Pathway Module Name
This is the name of the Pathway Module – this is not maintainable here.

Document Management Module Attachment Type Maintenance – Pathway Module Type Code
This is the code of the Pathway Module – this is not maintainable here.

Document Management Module Attachment Type Maintenance – Pathway Module Type Name
This is the Description of the Pathway Module Code – this is not maintainable here.

Document Management Module Attachment Type Maintenance – Attachment Type
This is the Attachment Type Code – this field is not maintainable here.

Document Management Module Attachment Type Maintenance – Attachment Type Description
This is the Attachment Type Description – this is not maintainable here.

Selecting the detail out button at the end of the Attachment Type description will take the user to the Attachment Type Form in enquiry mode only.

Document Management Module Attachment Type Maintenance – Store in TRIM
The Store in TRIM checkbox will determine whether the Image linked as the Paperclip Attachment will be stored in the TRIM document store or in the normal Pathway Document Storage. If they are stored in TRIM, they will be removed from their current location and stored in the TRIM document Store.

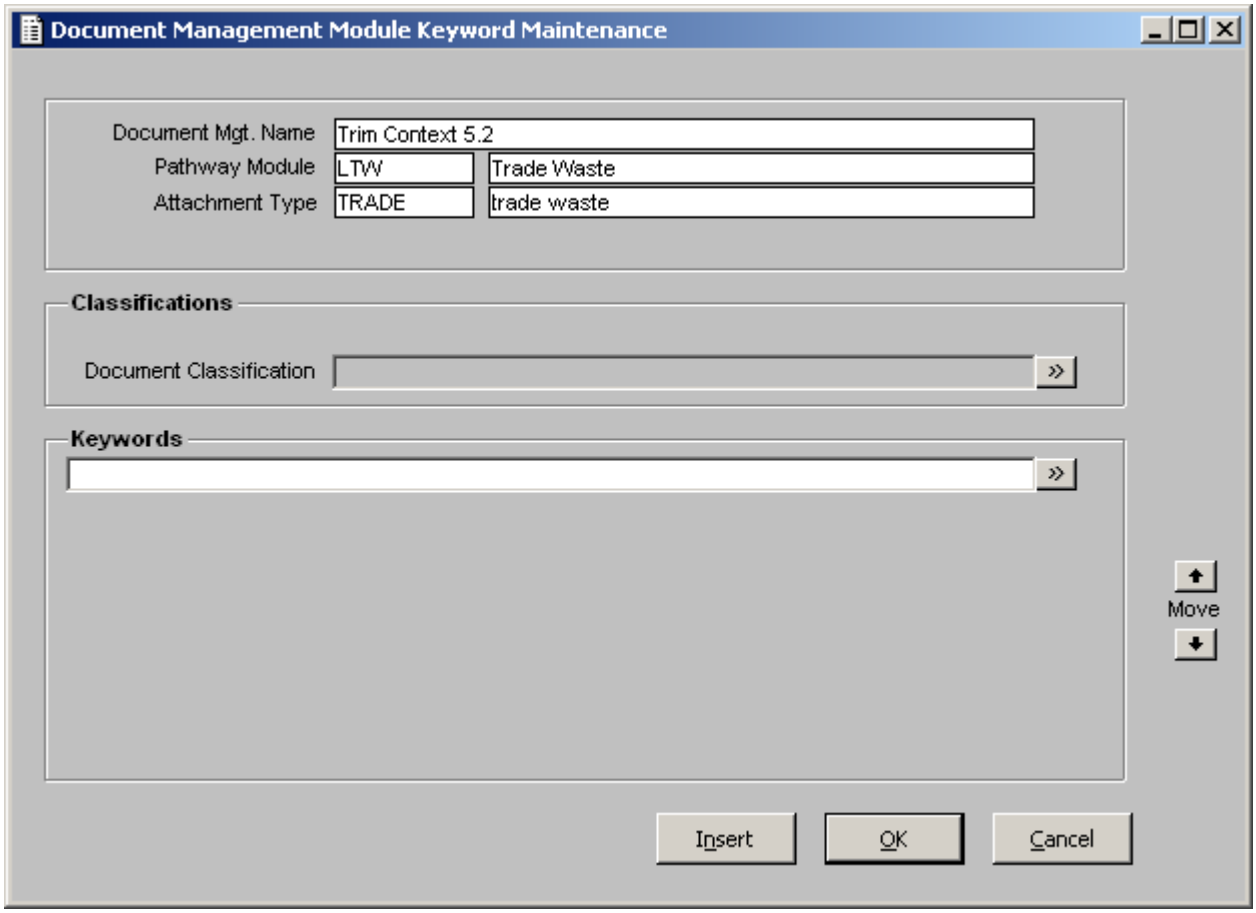
Document Management Module Attachment Type Maintenance – Search Profile
Enter the Attachment Type that you are searching for, or use the popup button – wildcard search function is available.

Document Management Module Attachment Type Maintenance – Search Profile
This is the description of the Attachment Type searched and chosen – this field is not maintainable here.

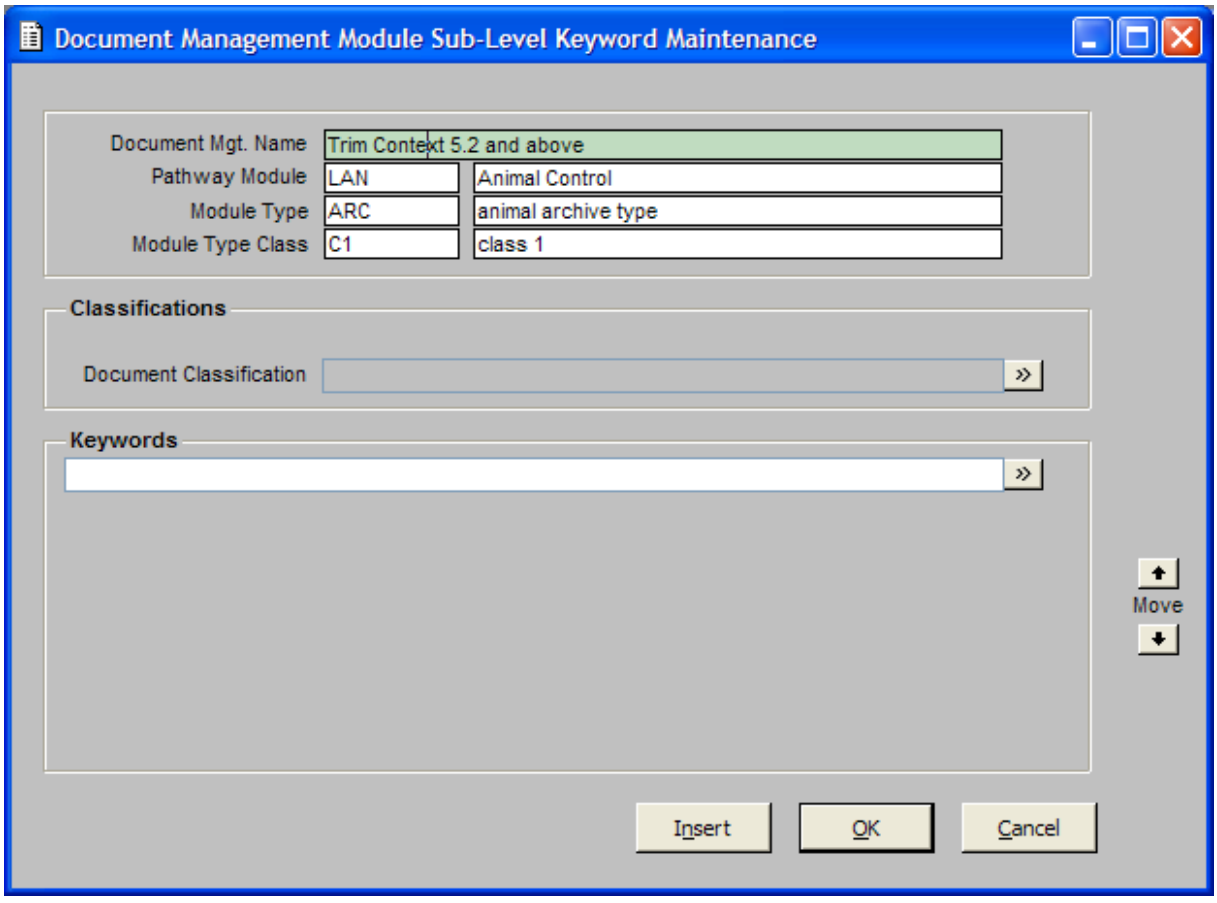
Document Management Module Attachment Type Maintenance – Search Profile
This allows for the selection of all Attachment Types, only those which are active or only those which are non-active. Use the drop down button to select the required status. All attachment Types is the default.

Document Management Module Titling and Keywords Maintenance

The Document Classification can be defined here and any number of keywords may be defined. The Keywords will be sourced from the Thesaurus within TRIM. Any number of Keywords may be defined and the move buttons will allow for the keywords to be ordered as required. The order on screen will represent the order within TRIM.



Document Management Module Keyword Maintenance Form



Document Management Module Sub-Level Keyword Maintenance Form

Document Management Module Keyword Maintenance – Document Management Name
This is the name of the Document Management system – this is not maintainable here.

Document Management Module Keyword Maintenance – Pathway Module Code
This is the code of the Pathway Module – this is not maintainable here.

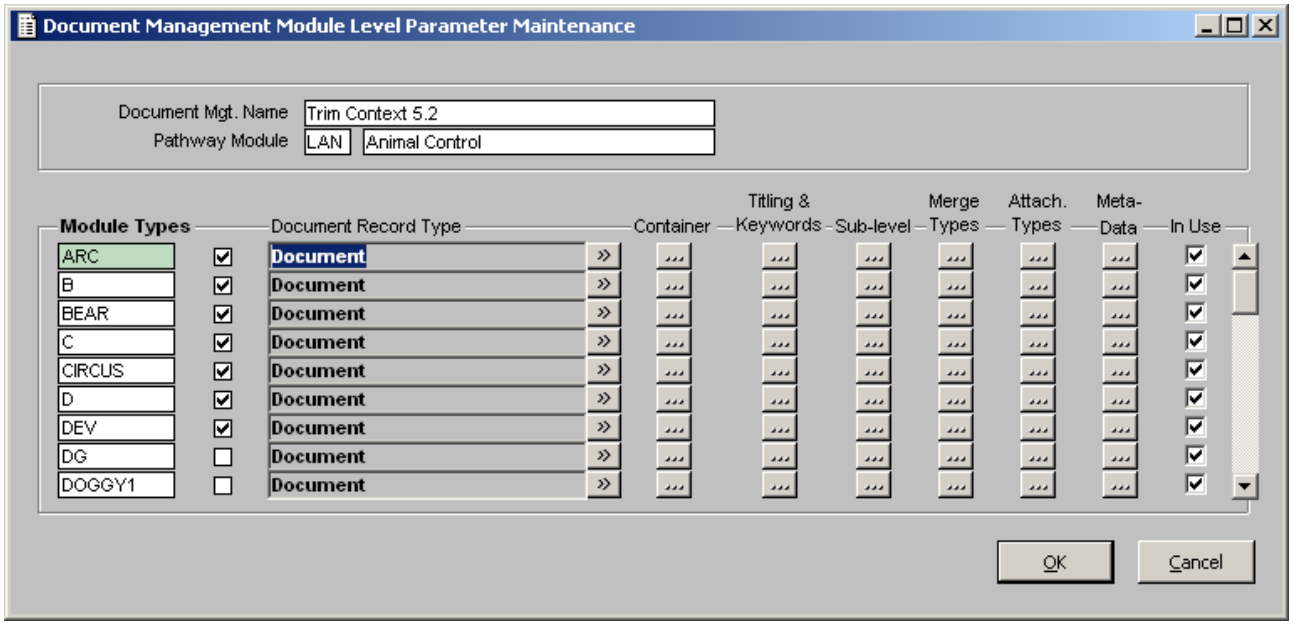
Document Management Module Keyword Maintenance – Pathway Module Name
This is the name of the Pathway Module – this is not maintainable here.
Use the popup button at the end of the Keywords field to access TRIM.

Document Management Module Keyword Maintenance – Attachment Type Code
This is the Document Attachment Type Code – this is not maintainable here.

Document Management Module Keyword Maintenance – Attachment Type Code Description
This is the Document Attachment Type Code Description – this is not maintainable here.

Document Management Level Parameter Maintenance

Document Management Level Parameter Maintenance



Document Management Module Level Parameter Maintenance Form

The Level Parameter allows council the ability to control the TRIM Interface for each Animal Type. Check the 'In Use' flag 'OFF' to prevent documents of that Animal Type being registered in TRIM. Where this 'In Use' parameter is checked 'OFF', the documents will be stored within the Pathway Document Structure as per the Word Processing Parameters.

Document Management Module Keyword Maintenance – Pathway Module Code
This is the code of the Pathway Module – this is not maintainable here.

Document Management Module Keyword Maintenance – Pathway Module Name
This is the name of the Pathway Module – this is not maintainable here.

Document Management Module Parameter Level – Module Types
This will display all of the Types that have been setup within Pathway module. The non maintainable checkbox next to the Type advises if this animal type is still active within Pathway.

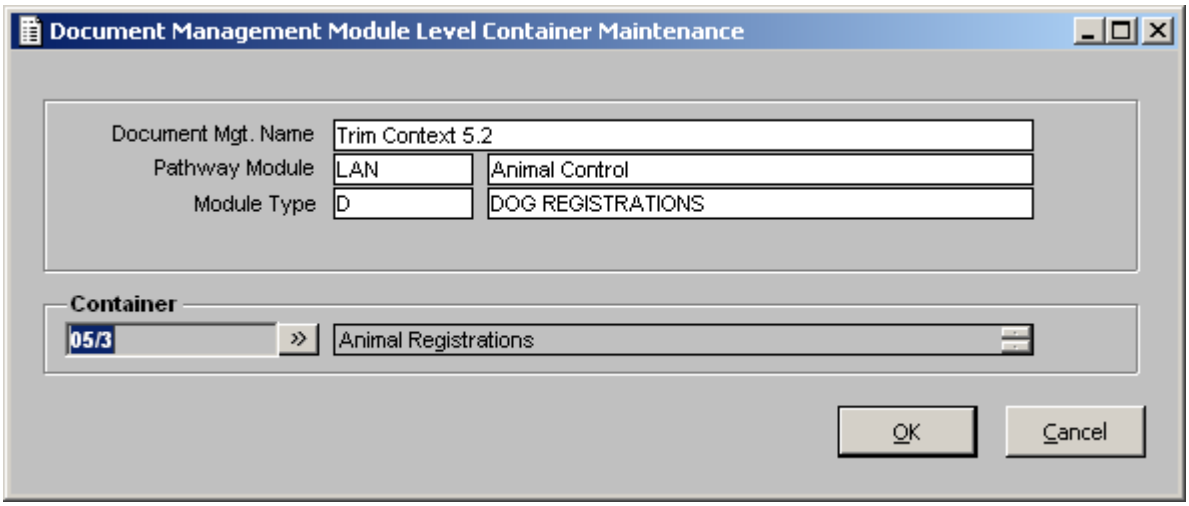
Document Management Module Parameter Level – Document Record Type
The Document Record Type may be altered for each Class. Where an entry is not made, the default will be used from the Module level parameter.

** For security reasons it is an Infor Recommendation that a separate Document Type be used for Pathway Documents.

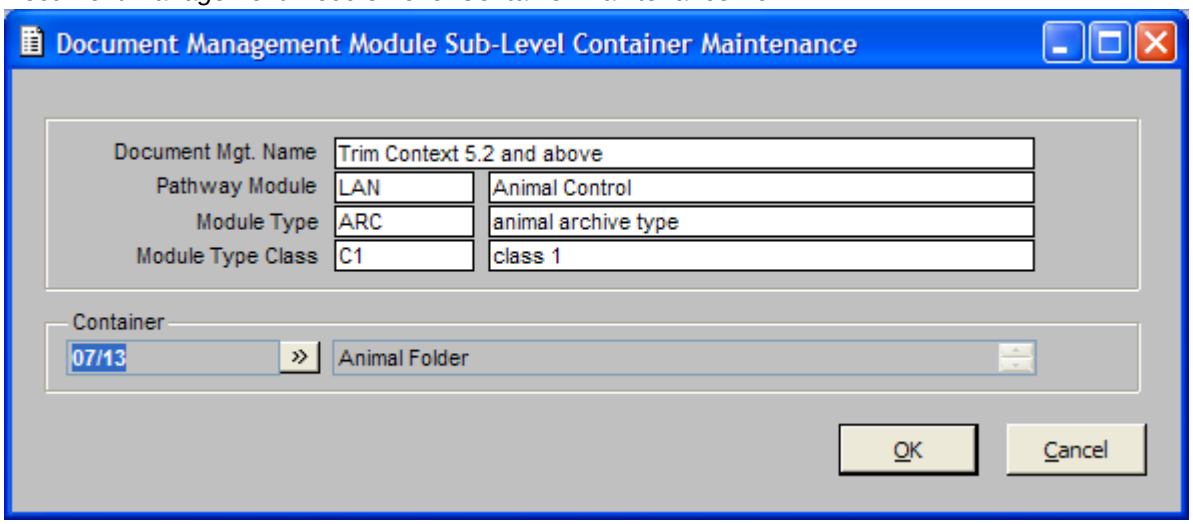
Document Management Module Parameter Level – In Use

Where the In Use flag is checked ON, this indicates that this Type is currently using TRIM Integration. For those types that you do not wish to have integrated to TRIM, turn this parameter OFF.

Document Management Module Parameter Level – Container



Document Management Module Level Container Maintenance Form



Document Management Module Sub-Level Container Maintenance Form

Document Management Module Level Container Maintenance – Document Management Name
This is the name of the Document Management system – this is not maintainable here.

Document Management Module Level Container Maintenance – Pathway Module Code
This is the code of the Pathway Module – this is not maintainable here.

Document Management Module Level Container Maintenance – Pathway Module Name
This is the name of the Pathway Module – this is not maintainable here.

Document Management Module Level Container Maintenance – Certificate Class Type Code
This is the Pathway Certificate Class Type Code – this is not maintainable here.

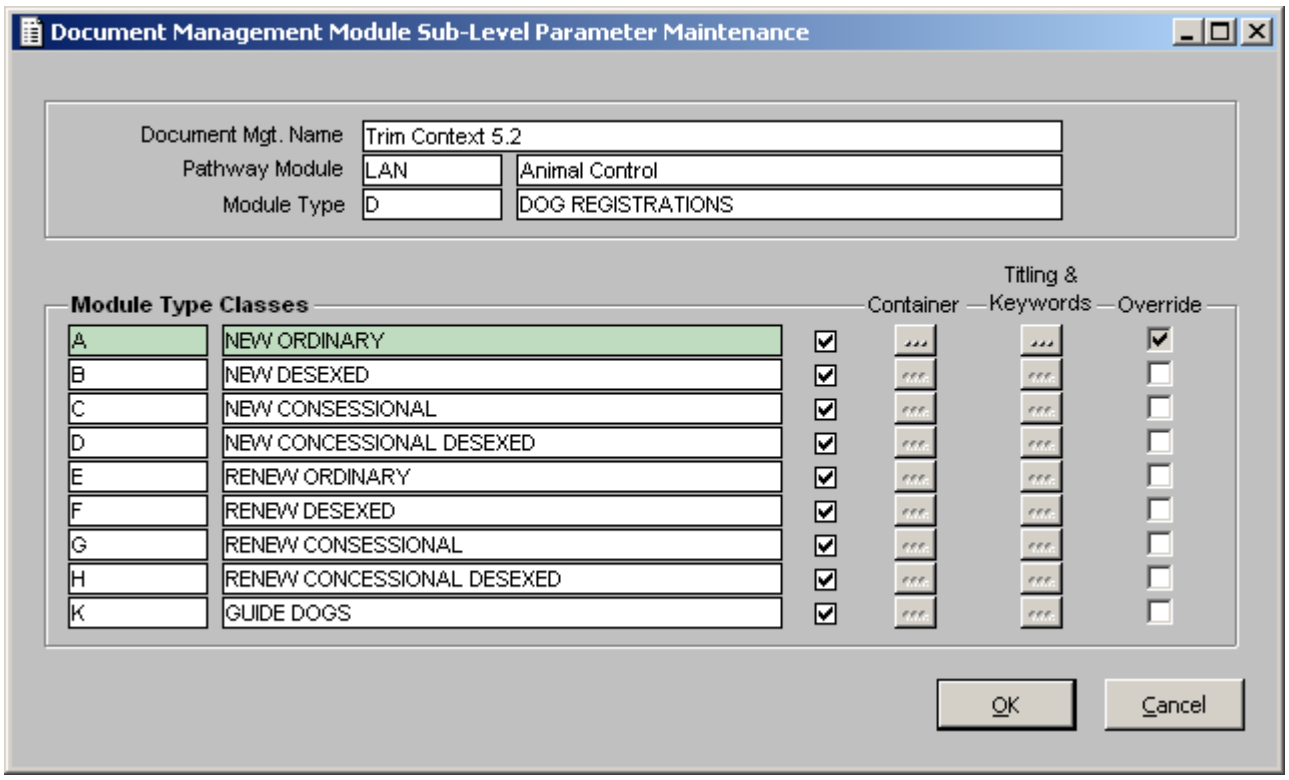
Document Management Module Level Container Maintenance – Certificate Class Type Code Description
This is the Pathway Module Description of the selected Module Type – this is not maintainable here.

Document Management Module Parameter Level - Container

The Default Container from the Module will be displayed here. Use the Popup button to select a new Container that is specific to the Type. This allows councils to select a different Functional folder based on the Module Type.

Document Management Module Parameter Level – Container Description
This is the description of the selected Container – this is not maintainable here.

Document Management Module Sub-Level Parameter Level



Document Management Module Sub-Level Parameter Maintenance Form

Check on the Override button if you wish to override the default settings. Checking ON the override option will make the Container and Titling and Keywords available.

Document Management Module Sub-Level Parameter Maintenance – Document Management Name
This is the name of the Document Management system – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Pathway Module Code
This is the code of the Pathway Module – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Pathway Module Name
This is the name of the Pathway Module – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Pathway Module Type
This is the Pathway Module type – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Pathway Module Description
This is the Pathway Module Description of the selected Module Type – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Pathway Module Type Classes Code
This is the Pathway Module type Sub Class code – this is not maintainable here.

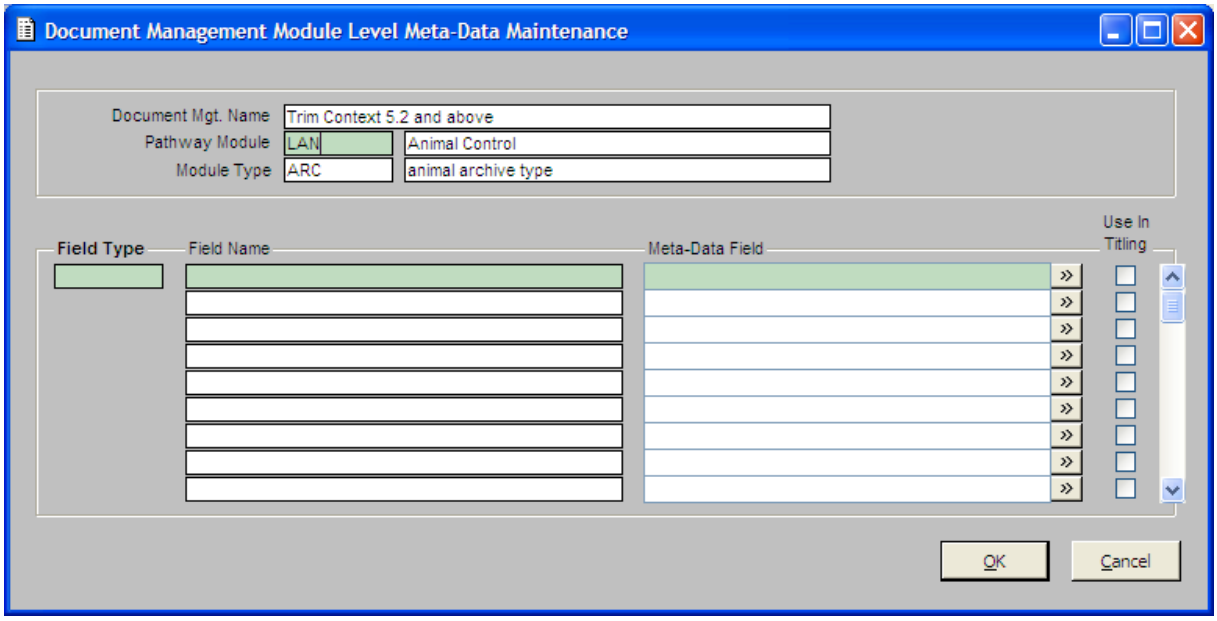
Document Management Module Sub-Level Parameter Maintenance – Pathway Module Type Classes description

This is the Pathway Module type Sub Class description – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Override
Check on the Override button if you wish to override the default settings. Checking ON the override option will make the Container and Titling and Keywords available.

Document Management Module Level Meta-Data Maintenance

Document Management Module Level Meta-Data Maintenance



Document Management Module Level Meta-Data Maintenance Form

This form provides council with the opportunity to map the Pathway fields to the TRIM Context Meta-Data Fields. This is available at the Container and the Document Level. Click on the popup at the end of each line will invoke the TRIM Context selection form for User Defined Fields.

Document Management Module Sub-Level Parameter Maintenance – Document Management Name
This is the name of the Document Management system – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Pathway Module Code
This is the code of the Pathway Module – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Pathway Module Name
This is the name of the Pathway Module – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Pathway Module Type
This is the Pathway Module type – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Pathway Module Description
This is the Pathway Module Description of the selected Module Type – this is not maintainable here.

Document Management Module Sub-Level Parameter Maintenance – Field Type
This is the description of the Pathway Field Type – this field is not maintainable here/

Document Management Module Sub-Level Parameter Maintenance – Field Name
This is the description of the Pathway Field Name – this field is not maintainable here/

Document Management Module Sub-Level Parameter Maintenance – Meta Data Field

The Metadata fields can be retrieved from TRIM by using the popup function at the end of each line. This will provide the operator with a list of fields that are available for selection. If this data is not required, then the Meta-Data field may be left blank.

***** Tip – If a field is to be used in Titling, you MUST nominate a Meta-data field.***

Use in Titling

The Use in titling checkbox should be checked ON for those pieces of Meta-data that council wishes to include in the Container and Document Titles. The move buttons at the right of the screen allow for these fields to be ordered. The order of the fields on this screen will represent the order that this information will be recorded within TRIM Context.

***** Tip – Use the Move buttons to re-order the fields so that those Fields that are to be used in the Title are sequenced first. This makes it easier when comparing information to Meta-Data at the next Level.***

GENERIC EDMS Interface

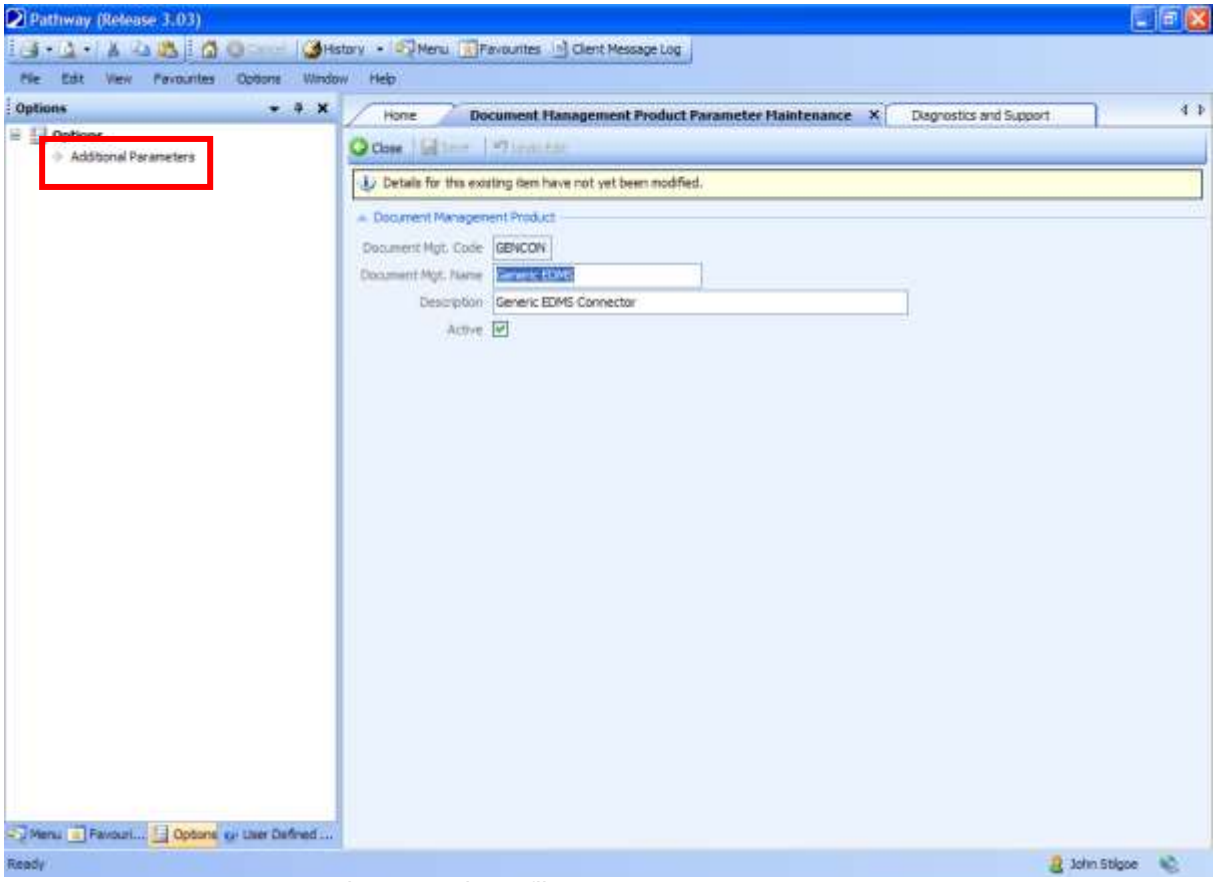
Generic EDMS Interface

This is an Authorised Function.

This function is designed to allow the linking of Pathway to any EDMS without the need for specific programming and/or parameters that is required when interfacing with a specific EDMS system – eg Dataworks, Trim etc.

Generic EDMS Interface

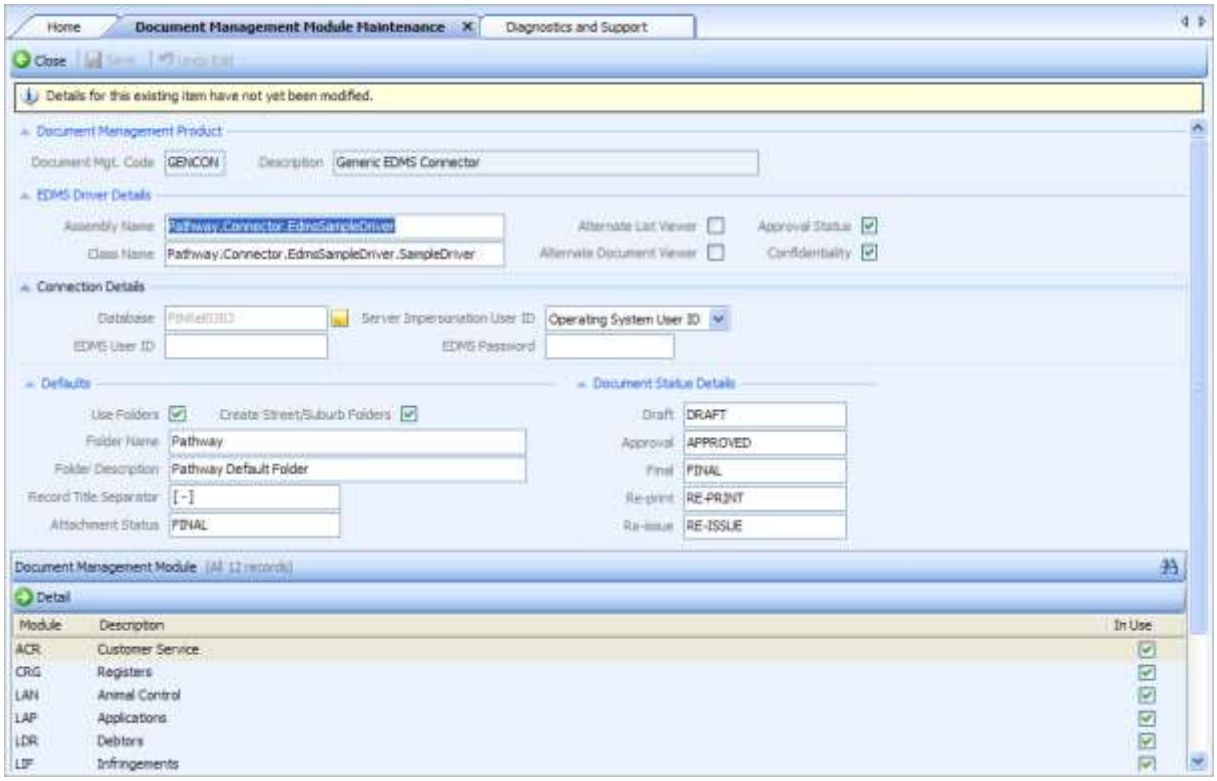
Below are details of all parameters required to be reviewed and/or set up to enable the interfacing between Pathway and a generic EDMS system.



Document Management Product Search Profile Form

NOTE: The ability to select the GENCON (Generic EDMS) system and the underlying parameters is only available for selection from the Smart Client version of Pathway. However the processes of storing and retrieving documents are allowed from both versions of Pathway.

Highlight GENCON (Generic EDMS Connector), select Additional Parameters - the following screen is displayed:



Document Management Module Maintenance Form

Document Management Product

Document Mgt. Code
This is the code for Generic EDMS system – it is defaulted in from the previous screen – it is not maintainable from this screen

Description
This is the full description of the Generic EDMS system – it is defaulted in from the previous screen – it is not maintainable from this screen.

EDMS Driver Details

Assembly Name
Pathway needs to know how to communicate to the EDMS Driver (through GENCON); the user should supply the name of the assembly in the field labelled “Assembly Name”. The file naming rules for the assembly name are as follows:-
• The EDMS Driver must be implemented as a .NET 2.0 or later assembly.
• The EDMS Driver assembly must reference the Pathway.Connector assembly.
• The aim for the EDMS Driver is to provide the entire implementation in a single assembly and perhaps an additional configuration file if it is necessary.
• The EDMS Driver assembly must adhere to the naming convention "Pathway.Connector.*.dll".
o Example names for EDMS Driver assemblies: "Pathway.Connector.EdmsSampleDriver.dll", "Pathway.Connector.FileNetDriver.dll"
• If a configuration file is required it must adhere to the same naming convention eg. "Pathway.Connector.FileNetDriver.dll.config"
• The EDMS Driver cannot assume where it will be running. It may run in a Pathway Smart Client, it may run in a Pathway Thick Client, it may run in a Pathway Application Server process and it may run in a Pathway batch queue process.

Class Name

The “Class Name” is implemented in the driver and made available to Pathway via the assembly. A different EDMS Driver is required for each underlying EDMS but the Pathway Generic EDMS Connector that activates the EDMS Driver does not change. Only one EDMS Driver can be active per Pathway environment.
The functions of an EDMS Driver can be split into two categories; document processing and (optional) document viewing. Each of the EDMS Driver’s functions (such as register a document) correspond to methods an EDMS Driver class must implement. Please refer to the Pathway Generic EDMS Interface SDK for class-specific information.
The other fields in the EDMS Driver pane are optional and control the Driver’s optional viewer functions and whether or not the EDMS Driver will pass additional information to Pathway.

Alternate List Viewer
“Alternate List Viewer” – when Pathway makes a call to the EDMS Driver for a list of all documents that are stored in the EDMS against a particular Pathway business object (eg a property or an application), by default the results of that search will be displayed in a Pathway form. However, the EDMS may provide its own search result list viewer function. If so, the EDMS can tell Pathway of this through the Driver. If the “Alternate List Viewer” checkbox is left unchecked then the user is telling Pathway that the EDMS does not provide an overriding list viewer and Pathway will use its own form to display search results. However, if this checkbox is checked (ie. turned ON) then the EDMS must provide a search result list viewing function of its own and the Driver must provide instructions to Pathway as to how to activate/access the EDMS’ functionality.

Alternate Document Viewer
“Alternate Document Viewer” – by default, Pathway will use local Windows file associations to view any document a user selects from a search results list. However, some EDMS products provide their own overriding viewer which bypasses local Windows file associations when the user attempts to access a document which is stored in the EDMS. By leaving the checkbox unchecked the user is telling Pathway to use local Windows file associations to control which application is invoked to view a document. If the checkbox is checked then the Driver must provide a document viewer of its own and the instructions to Pathway as to how to activate/access the EDMS’ functionality.

Approval Status
“Approval Status” is a global parameter that controls whether or not Pathway uses status information passed to it by the EDMS Driver. The status of Pathway-generated documents (such as approval status) may be modified or managed outside of Pathway. The Driver will tell Pathway whether or not various status operations are supported and if so, what value is applicable for each document retrieved. Pathway will also hold default values for each status type that applies to document operations including Re-issue status, Approval status, Final printed status, Draft printed status etc. Pathway Attachments will also have a default status value.

Confidentiality
“Confidentiality” of Pathway-generated documents may be managed externally to Pathway if the Driver tells Pathway the underlying EDMS supports that functionality. The Driver can tell Pathway for every document retrieved from the EDMS whether or not Confidentiality is applicable for this document and whether or not the user that has told the Driver to retrieve the document has the ability to change the confidentiality of the retrieved document. Pathway will preserve the confidentiality of the document in accordance with what the Driver tells it. Control of this functionality within Pathway is determined at a global level by the checkbox. If it is checked (“ON”) then Pathway will look for the Driver’s information on confidentiality, if unchecked, Pathway will ignore the Driver’s information. Pathway will have a default value for confidentiality against each merge type. The default value will be “OFF”.

Connection Details

Defaults

Use Folders
"Use Folders" is a global parameter that "turns off" all folder functionality on the Pathway GENCON side of the interface. This prevents Pathway passing folder information to the Driver and prevents actioning of the Bulk Operations associated with folders. If this parameter is turned OFF, other folder-related checkboxes and fields/defaults will be ignored. If however this checkbox is checked (ie. turned "ON") then other complementary folder-related fields will be actionable.

Create Street/Suburb Folders
If the "Create Street/Suburb Folders" checkbox is checked then the "Bulk Folder Update" option of the GENCON "Housekeeping" menu will allow for a folder to be created in the EDMS for every Street/Suburb combination. There is no capacity for Pathway-generated documents to be profiled against Street/Suburb folders (as there are no "street/suburb documents" per se) but this function will allow for in-bound documents, that is, non-Pathway-generated documents, to be profiled or registered against the Pathway Street/Suburb business object outside of Pathway.

Folder Name
"Folder Name" will be an editable field if "Use Folders" is turned on. This field will contain the name of the default folder to be applied if a specific folder is not applicable at a lower level such as module or class or type or merge type. It could be considered an "error posting account" for EDMS integration purposes in that if folder operations are required, then it is likely that rules relating to which folders are to be used for registration of which documents apply, perhaps at many levels. If so, then the default folder name is just that; a default. If a document does get registered in this folder in the EDMS it probably has occurred in error due to lower level folder parameters being incorrect or missing.

Folder Description
"Folder Description" is the default description or comment applied to the folder specific in the "Folder Name" parameter.

Record Title Separator
When Pathway creates folders in the EDMS (if it passes such a command to the EDMS Driver if the "Use Folders" parameter is turned on) then Pathway can derive a title for the folder. The same titling capability applies to documents that Pathway seeks to have registered in the EDMS via the Driver. The user has the option to have quite complex, multi-field titling rules applied including a delimiting character which will be inserted into the folder name or document title between each title component. This "Record Title Separator" parameter field is where the user specifies the character that is to be inserted.
Note: the user should check with the EDMS administrator that the EDMS supports the use of the selected character in that role.

Attachment Status
"Attachment Status" is where the user specifies what Pathway should use as the default status value of an attachment (as opposed to a document).

Document Status Details

The Generic EDMS System allows the user to set up their own description of the status of documents stored in the EDMS system.

"Documents Status" parameters are where the user specifies the default values for Pathway to assign to a document depending on the operation being performed. These include "Draft", "Approval", "Final", "Re-print" and "Re-issue".

Draft
This will be the description stored against any documents in Draft mode.

Approval
This will be the description stored against any documents in Approval mode.

Final
This will be the description stored against any documents in Final mode.

Re-Print
This will be the description stored against any documents in Re-Print mode.

Re-Issue
This will be the description stored against any documents in Re-Issue mode.

Document Management Module

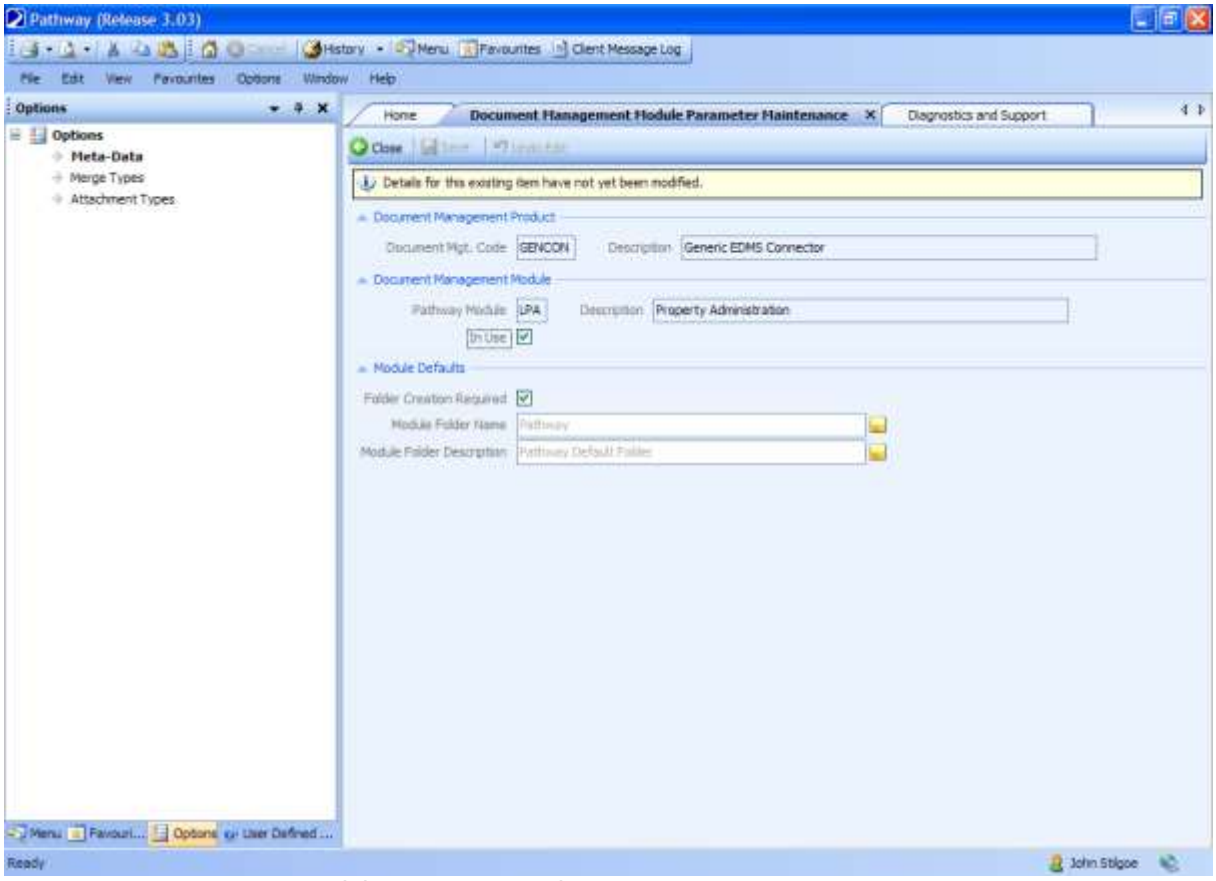
Module
This is the list of Pathway Modules that are able to be linked to Generic EDMS.

Description
This is the full description of the Pathway Modules that are able to be linked to Generic EDMS.

In Use
Select this to indicate that this module is 'In Use' ie all or some of the documents is to be stored in the EDMS system.

Detail

Once the global GENCON parameters are set, then the module-level (and sub-module-level) parameters can be set. This is achieved by selecting a Pathway module and clicking the "Detail" button which then takes the user to the next level of maintenance.



Document Management Module Parameter Maintenance Form

Document Management Code
This is the code for Generic EDMS system – it is defaulted in from the previous screen – it is not maintainable from this screen

Description
This is the full description of the Generic EDMS system – it is defaulted in from the previous screen – it is not maintainable from this screen.

Document Management Module – Code and Description
“Pathway Module” and “Description” fields are non-input-capable and simply confirm for the user which module-level parameter forms they’ve selected. The value of “Pathway Module” is the system-defined three letter code (in the case of Property its “LPA”).

In Use

The “In Use” checkbox determines whether or not EDMS integration is active for this module. It must be turned on and the Word Processing parameters must be turned on for this module to invoke the document management integration functionality. If this checkbox remains unchecked then any Pathway-generated documents will be created in the default Pathway document store as defined under the Word Processing Parameters.

Module Defaults

Folder Creation Required
The “Folder Creation Required” checkbox is used in conjunction with the global “Use Folders” checkbox. If the global parameter is turned on then this module-level checkbox will determine if Pathway seeks to manage folders (eg create/validate/delete) in the EDMS for this module. If the checkbox is checked ON then Pathway will (ask the EDMS Driver to) create folders if one does not

exist when a Pathway-generated document is registered in the EDMS. This checkbox also determines if this module is available in the “Bulk Folder Update” option.

Module Folder Name
If folder operations are active, the “Module Folder Name” field allows the user to define a module-level default folder into which Pathway-generated documents from this module will be registered unless sub-module level override values are provided. The initial value displayed will be the system-level default assigned in the previous form however it can be overridden.

Module Folder Description
“Module Folder Description” is also a defaulted value from the global default but can also be overridden.
Each module then allows for sub-level parameters to be set as applicable for that module. For the Property Administration module the next level options are as follows:-
“Meta Data” allows the user to specify whether or not default meta data values are to be passed to the EDMS Driver when a Pathway-generated document is registered in the EDMS or if override meta data values are to be passed or no meta data is relevant. As with each module, the meta data provided is categorised in three ways:-
a) business object meta data (information that relates to the underlying business object against which this document has been generated. In the Property module this includes property-related data such as formatted address, owners name, legal description etc)
b) document meta data (these are common to all Pathway-generated documents and include information values such as addressee, issue date, document key etc)
c) system meta data (these are common to all Pathway-generated documents and include information such as author, creation date/time etc).

Please refer to the “Meta Data” section of the Appendix of this document for a full list of meta data fields available for each module.
“Merge Type” parameters allow for Pathway-generated documents of specific merge types to have overriding EDMS integration parameters set.

"Attachment Types" parameters allow for all valid attachment types for this module to have overriding EDMS integration parameters set.

Options

Meta Data

Document Management Code

This is the code for Generic EDMS system – it is defaulted in from the previous screen – it is not maintainable from this screen

Description

This is the full description of the Generic EDMS system – it is defaulted in from the previous screen – it is not maintainable from this screen.

Document Management Module – Code and Description

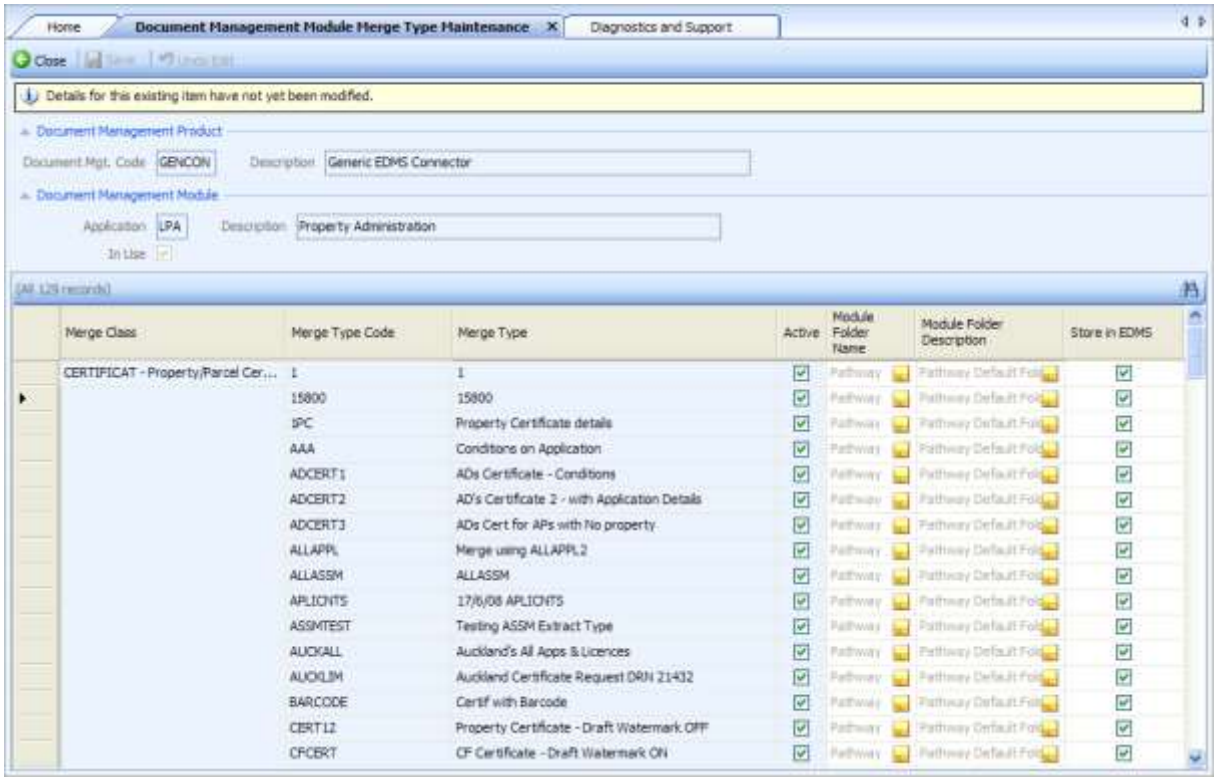
"Pathway Module" and "Description" fields are non-input-capable and simply confirm for the user which module-level parameter forms they've selected. The value of "Pathway Module" is the system-defined three letter code (in the case of Property its "LPA").

Folder and Document Meta Data

The Meta data parameter form allows the user to determine if each standard Meta data field is to be included in GENCON's registration commands sent to the EDMS Driver. This is determined by the "Use Meta Data" column checkboxes. If a checkbox is checked ON then the Meta data value will be included. The default value for all/any "Use Meta Data" field is "ON".
In addition to passing values for Meta data fields, this form also allows the user to specify which Meta data values are to be used in the titling of Pathway-generated documents when they are registered in the EDMS. The user checks on the checkboxes in the "Use In Titling" column of applicable rows and if necessary, the order of rows can be changed (via the "up"/"down" arrows) to change the order of titling.
If no overriding values are provided, the value of the Meta data field name passed to the EDMS Driver is as per the "Field Name" column. However, if the underlying EDMS (or the Driver) has constraints concerning field names passed then the user can override the Meta data field names by entering a value in the "Meta Data Field" column. The override value will be passed to the EDMS Driver as the name of the Meta data field. The *value* of the Meta data field will remain unaffected by the *name* of the Meta data field that is passed to the Driver.
If folder operations are active, then Meta data is also defined for folders. This is the Meta data for Property folders:-
Again, the order of the rows can be modified to ensure that folder titling reflects Council's preferences. The "Meta Data Field", "Use Meta Data" and "Use In Titling" columns support the same functions for folders as the equivalent functions described above for documents.
Different "Folder" Meta Data values are available for different modules depending on the standard business object components. For instance, the Pathway Applications module allows for additional Meta data fields to be defined at folder level as follows:-
Please refer to the "Meta Data" section of the Appendix of this document for a complete list of meta data fields supported.

Merge Types

As shown in the sample below (for the Property module) the user can provide override values for individual merge types. This means that Pathway-generated documents can have their EDMS integration behaviours controlled at the merge type.
The first four columns ("Merge Class", "Merge Type Code", "Merge Type" and "Active") are display-only fields.



Document Management Module Merge Type Maintenance Form

Merge Class

This is the list of Merge Class(es) pertaining to the modules selected

Merge Type Code

This is the list of Merge Type Codes relevant to the Merge Class(es) above.
Merge Type Description
This is the list of Merge Type Codes relevant to the Merge Class(es) above.

Active

This indicates if the Merge Type is currently active or not.

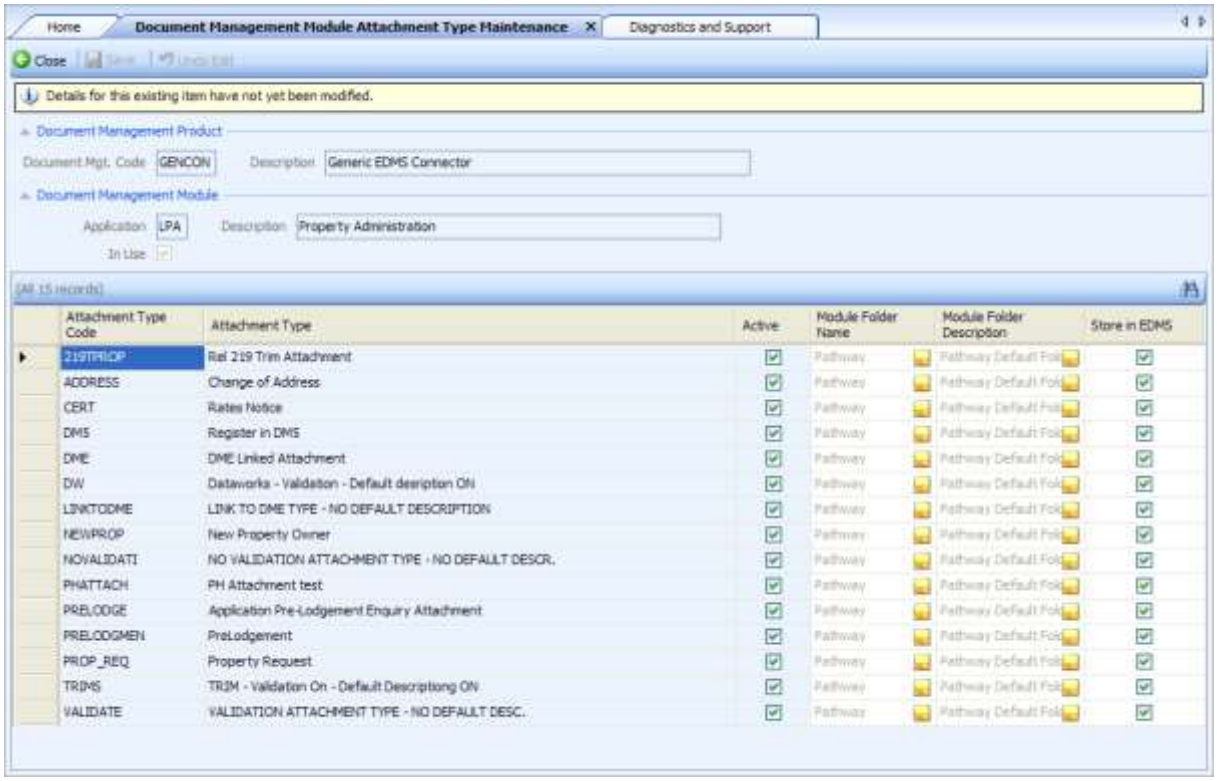
Module Folder Name and Module Folder Description

As per the module level parameters, if folder operations are active, the user can assign a specific overriding folder value for each/any merge type by typing it into the “Module Folder Name” and “Module Folder Description” columns.

If the user unchecks the checkbox in the “Store in EDMS” column then any Pathway generated document of that merge type will not be registered in the EDMS and will be managed in Pathway’s own document store. Care should be taken with this parameter as once it is turned ON, Pathway will then expect ALL documents of this merge type to be located in the EDMS. By default the “Store in EDMS” value is turned ON.

Attachment Type Parameters

The first four columns (“Attachment Type Code”, “Attachment Type” and “Active”) are display-only fields.



Document Management Module Attachment Type Maintenance Form

Document Management Code

This is the code for Generic EDMS system – it is defaulted in from the previous screen – it is not maintainable from this screen

Description

This is the full description of the Generic EDMS system – it is defaulted in from the previous screen – it is not maintainable from this screen.

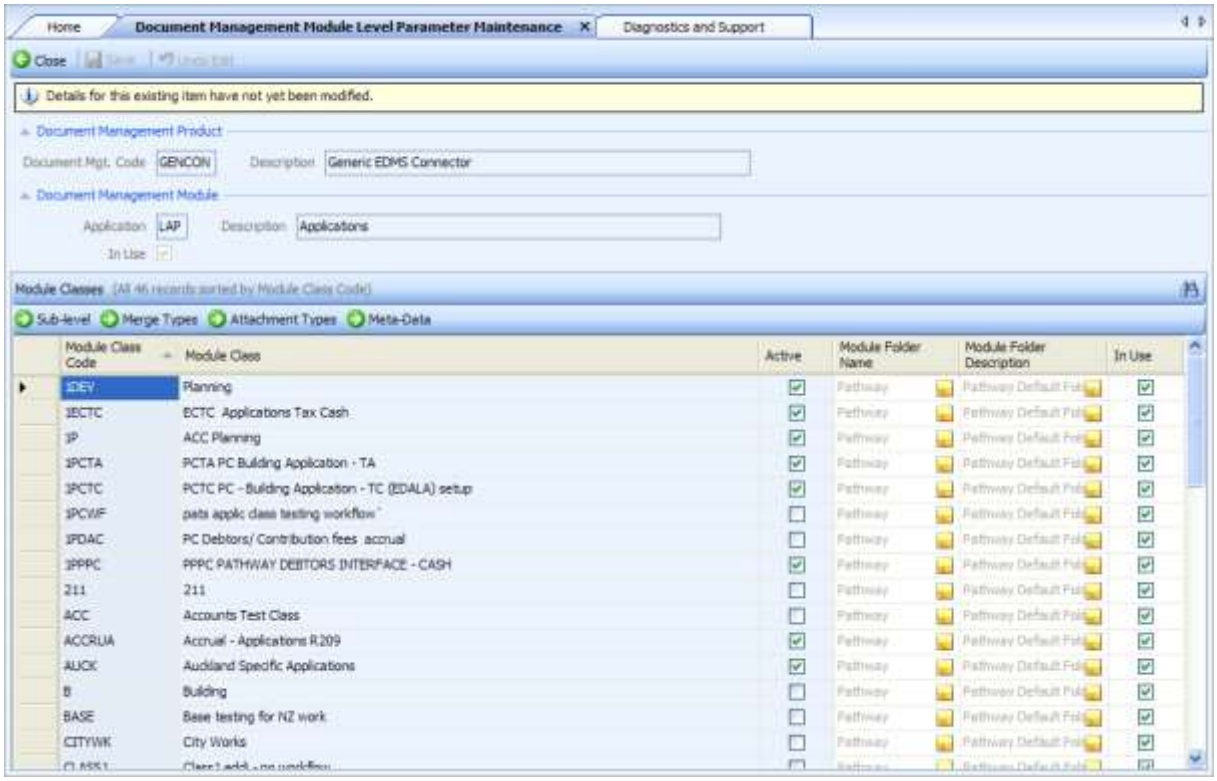
Document Management Module – Code and Description

"Pathway Module" and "Description" fields are non-input-capable and simply confirm for the user which module-level parameter forms they've selected. The value of "Pathway Module" is the system-defined three letter code (in the case of Property its "LPA").

If the user unchecks the checkbox in the "Store in EDMS" column then any Pathway attachment of that type will not be registered in the EDMS and will be managed in Pathway's own document store. Care should be taken with this parameter as once it is turned ON, Pathway will then expect ALL attachments of this type to be located in the EDMS. By default the "Store in EDMS" value is turned ON.
As per the module level parameters, if folder operations are active, the user can assign a specific overriding folder value for each/any attachment type by typing it into the "Module Folder Name" and "Module Folder Description" columns.

Module Sub-Level Parameters

Some Pathway modules incorporate business objects which are managed on a class/type basis. This means there are multiple levels at which EDMS integration parameters can be set; either in accordance with the parameters mentioned above, or, at the class level or at the type level (under class). This allows for potentially very complex EDMS integration configuration. For instance, here are samples from the Applications module. (Note: first three columns are read-only)



Document Management Module Level Parameter Maintenance Form

Document Management Code

This is the code for Generic EDMS system – it is defaulted in from the previous screen – it is not maintainable from this screen

Description

This is the full description of the Generic EDMS system – it is defaulted in from the previous screen – it is not maintainable from this screen.

Document Management Module – Code and Description

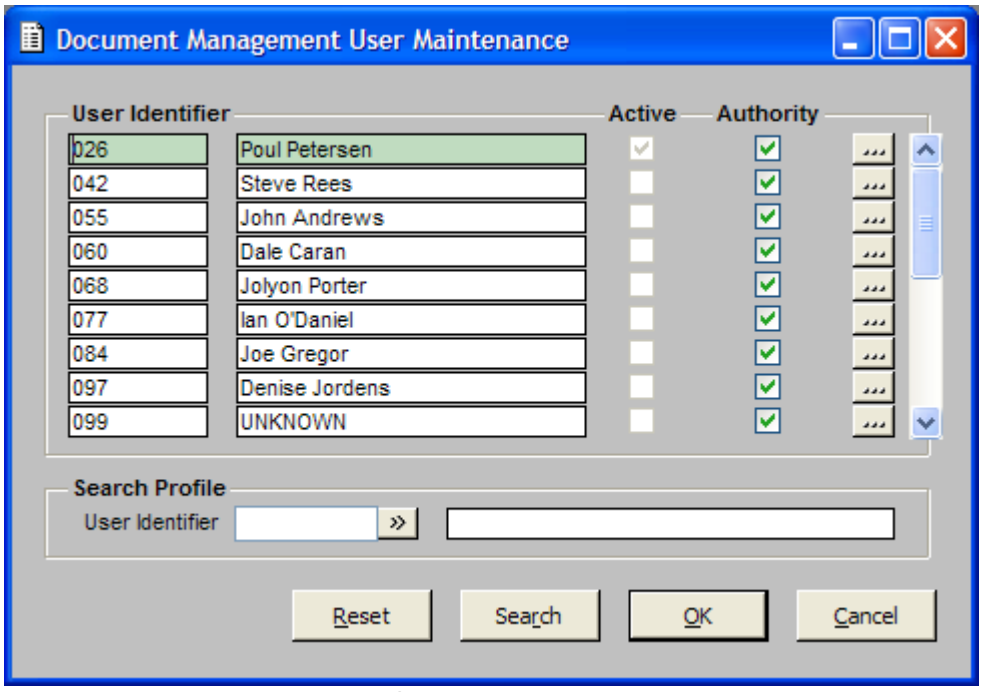
"Pathway Module" and "Description" fields are non-input-capable and simply confirm for the user which module-level parameter forms they've selected. The value of "Pathway Module" is the system-defined three letter code (in the case of Property its "LPA").

Module Folder Name and Module Folder Description

Each class can support folder overrides (if folder operations are active) by typing override values into the "Module Folder Name" and "Module Folder Description" columns. By default the values displayed are the system-wide folder default values.
Each class allows for the EDMS integration activity to be turned OFF at the class level thereby ensuring that any document generated by Pathway for any and all application types in that class will be managed by Pathway's own document store and not registered in the EDMS. This is achieved by unchecking the "In Use" checkbox. Note: care should be taken with this parameter as once the value is set, Pathway will seek related documents as per this parameter.
Subsequently, once the "Sub Level" button has been pressed for the selected class (as in the following example for "PCTA PC Building Application - TA" class) further overrides are available for folders:
…and for Merge Types…
…and attachment types…
…and Meta data at both folder (if required) and document levels…
Each of these sub-level parameter forms operate the same way as the module level parameter forms except the overriding values entered act at the class and/or type levels.

Document Management User Security

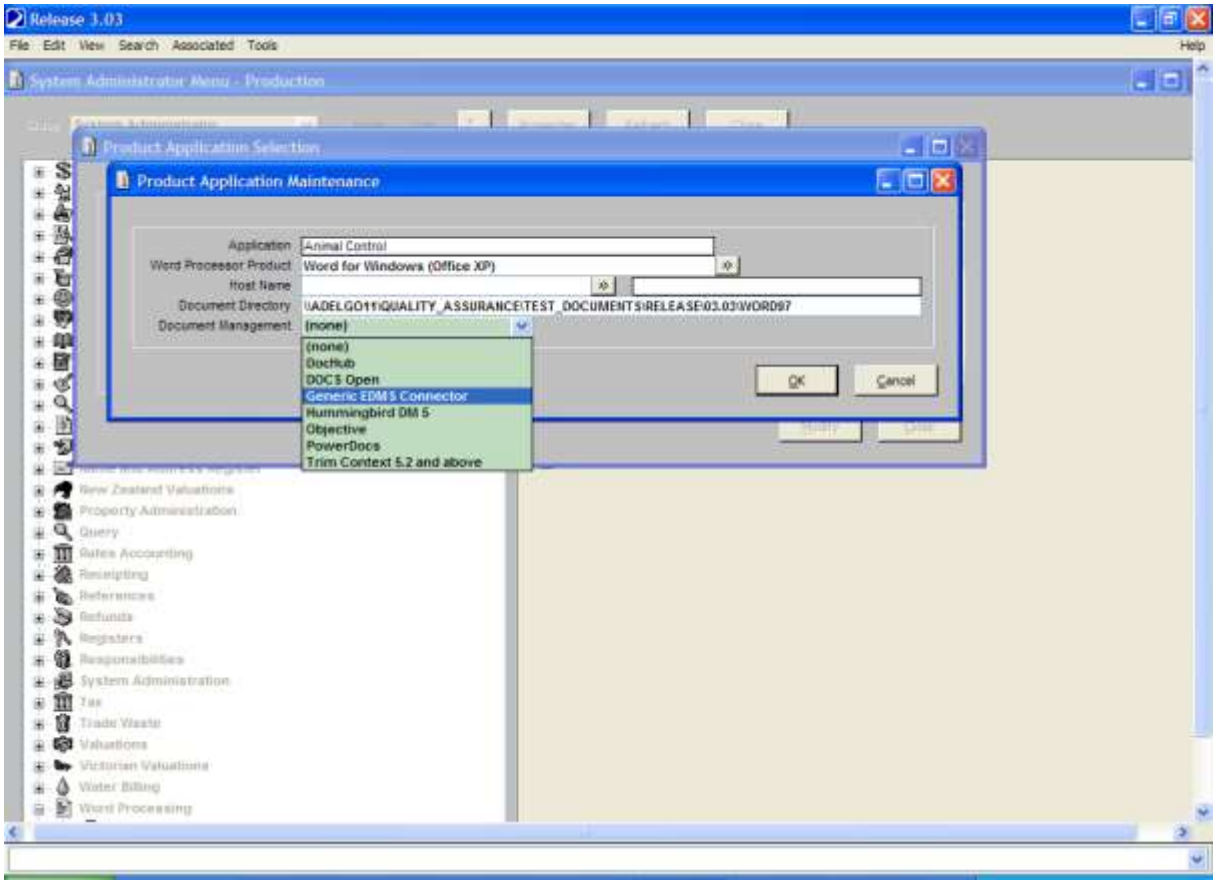
Having set up the parameters which control the individual functions of the GENCON interface (and therefore the default behaviours and information passed between Pathway and the underlying EDMS via the EDMS Driver) reverse accessibility needs to be defined. This means that if the EDMS system uses the Pathway COM API to invoke Pathway functionality via the DOC* methods, the accessibility to Pathway needs to be consistently applied to individuals.
When the DOC* API methods are invoked (eg DOCDisplay is used to drill down into Pathway from EDMS to show the details of a business object in Pathway against which a document is registered in EDMS) then the individual user's security/access controls in Pathway need to apply (as if the user was logging into Pathway interactively).



Document Management User Maintenance Form

This is achieved by using the "Document Management User Maintenance" option under the "Document Management Parameters" menu of the "Integration" menu under the "System Administration" master menu.
Each user can have an access mode defined for each Pathway module when it is access from the EDMS. The levels are "NONE", "ENQUIRY" or "MAINTENANCE". This means when Pathway is asked to display the details of one of its business objects by displaying the appropriate Summary form (eg Property Summary) then that display will either not happen, happen in read only mode or in full maintenance mode depending on the Document Management User security settings selected.

Word Processing Parameters
The Word Processing Application Parameters will need to be modified to enable Document Management integration to be specified as active for each Pathway module. This is achieved via a parameter maintenance form accessed through the following menu:
Access System Menu >> Word Processing >> Word Processing Parameters >> Product Application Maintenance



Product Application Maintenance Form

For each Pathway module for which document management integration is required (that is, the registration of Pathway-generated documents in the EDMS - as opposed to list/document viewing from Pathway) the user needs to ensure that GENCON-based document management is activated. This is an example for Property Administration:-

The value of the "Document Management" column is set to "Generic EDMS Connector" (from the drop-down list) for each Pathway module for which document management integration is required. *Note: leaving this parameter turned "OFF" for one or more modules – that is, leaving the Document Management column value set as the default ("None") – does not preclude the detailed GENCON interface parameters being set for those Pathway modules, it just prevents the document management integration from being activated when Pathway generates a document in that module (regardless of whether sub-module or merge type level parameters are set).*

Meta Data

Please refer to the SDK for a full list of the meta data properties the GENCON connector will supply to the driver. The meta data field use will vary depending on the value of "Create Folder" in each module – either meta data is for documents only or for both folders and documents. This following fields are exposed through GENCON parameter forms:-

Common Meta Data Fields (Document-related and System-related)

Module-Specific Document Meta Data Fields

Animals

Applications

Customer Request Management

Debtors

Infringements

Licensing

New Zealand Valuations

Property Administration
Rates Accounting
Registers
Street/Suburb (Note: Folder only – no documents generated)
Trade Waste

Folder Operations & Considerations

It's a bit of a balancing act is required with respect to Folder Operations in that on one hand an interface-driven structure (like folders) is "set and forget" and fairly safe but a data driven "structure", if indeed you have one, is more dynamic. This situation certainly requires more understanding by the users – in terms of what meta data is and how it can be used for searching, selecting, qualifying business rules and reporting – and perhaps requires more capability in the various front end applications that allow searching over FileNET data.
Why? Well, if you don't have folders and you use a data-driven profiling regime, then theoretically it doesn't matter where documents are stored inside FileNET as long as all the meta data held against objects in the EDMS is provided and maintained consistently by all business systems (like Pathway) that participate on the EDMS integration platform. If for instance Council decides to implement a "one folder/file per property" policy then yes, theoretically, searching in FileNET becomes easier because you can search for one folder and then review all its content which may have been sourced from every participating application. But, if someone registers a document into an incorrect folder (or folders are merged or deleted or renamed/renumbered/partitioned etc) then it's possible a folder-driven search inside FileNET wouldn't find all objects. Also, if Pathway and (say) SAP can utilise/control folders when registering and/or retrieving from EDMS but some other applications (like GIS or community services or payroll or whatever) can not do so, then the integrity of EDMS data may be compromised.
However, a meta-data driven search doesn't care about the folder because it is based on selection of candidate records based on object attributes (meta data) rather than logical or physical location (unless the folder's profile also stores the same meta data values and then it would also be returned in an object search inside FileNET). Having said that though, it's also true that basing an EDMS integration strategy on meta data (only) also assumes that each participating software application can provide and consume configurable meta data values as well as the body of each EDMS-related object's content. Council may consider a combination is best; that is, have folder structures that can act as a base framework and which become a simple default search approach, but, also ensure meta data is stored against each object in the EDMS such that more detailed data-driven searches can also be conducted if/when required (even if all they do is identify where registration irregularities have occurred and objects are found in the wrong folders). Fortunately, GENCON supports both approaches simultaneously.
There may be a perception that filing documents/objects in EDMS under data rules (eg class/type) then results in the integrity of that action being put at risk because those attributes on an underlying business object (like an application) can change – and therefore "break" a logical connection between a document associated with that business object and its "location" in EDMS. However, the other thing that GENCON, or more particularly, ACC's GENCON driver, could do is allow for dynamic meta data updates. It's not actually included in the standard GENCON functionality in Pathway because of a base assumption that the meta data on an object in EDMS should reflect the status of the object *as at the time of registration*.
However, that concept of "meta data time travel" is discussed in the futures document that accompanied the agreed functional specification.
For instance, if Pathway generates a document on a property (eg an inspection notice) then if GENCON is active (in ACC's case with FileNET as the underlying EDMS), and folder operations is turned on, that document will be registered in FileNET against a property folder with a document title, a range of business object meta data values (related to the property such as legal description, identifier, owner, address etc etc), a range of document meta data values (such as what merge type or document type, issue date, addressee, reference number etc) and a range of system-level meta data fields (such as workstation id, application that generated the document (eg MS Word), username, system creation date/time etc).
But, what if that property is sub-divided, say into two new properties and the original property is historicised? What happens to this document? One school of thought says "nothing". One school says

that the document should be re-registered against one of the new properties and the meta data against the document changed to reflect the new registration – as would be the case with any new documents generated after the subdivision. Another school of thought says that the document content hasn't changed (that is, it still is an inspection notice that refers to the original property) and therefore the document should remain registered against the now-historicised property and the meta data against it and the folder under which it is filed in the EDMS remain unchanged. A further view combines the two and says the original document and its original meta data and the original folder should remain the same but it should also be registered against one (or both) of the new "child property" folders or have additional meta data added to reflect the new properties.

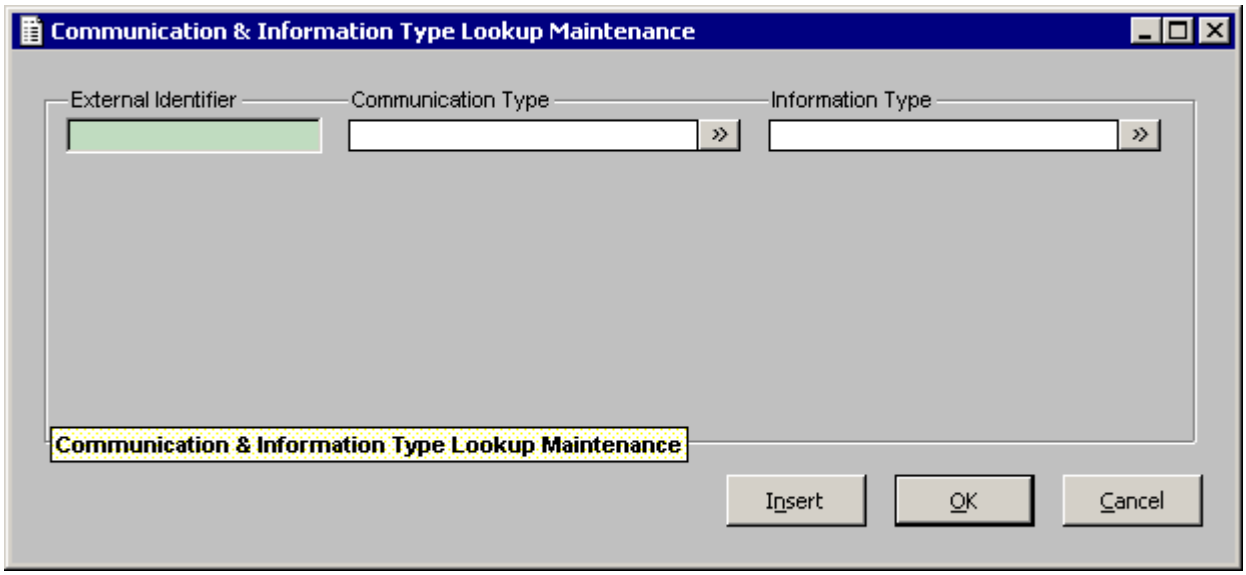
There are also arguments about that approach too in that the document, as a business object, hasn't changed so therefore its status and profile in EDMS shouldn't change. If the document is regenerated though, that's an entirely different matter because that action would be performed with a new "as at" framework and therefore the folder and potentially the meta data is different at the time of regeneration……unless of course the document was regenerated against the same (albeit now-historicised) property and therefore it should/would probably be registered into the same original property folder (which in EDMS may still be active even though it's historicised as a business object in Pathway).

All these business process and policy questions tend to be external to the source software applications that generate documents (and other objects that should be stored in the EDMS) and may well need to be determined by your relevant Public Records Act requirements and Council-wide standards as opposed to specific business processes of individual departments. However, whilst those determinations may be critical for some software applications – because they can perhaps only deal with one approach to EDMS integration – GENCON allows Pathway the flexibility to control the registration parameters including folders and meta data on the Pathway side but still be "told" by the EDMS driver what FileNET's view of the world is….that is, as long as Pathway is provided with its unique document key by the EDMS driver, Pathway doesn't know or need to know if other attributes have changed inside the EDMS for the EDMS's own purposes.

It can all get "pretty messy" from a policy point of view when a Council tries to establish a corporate-wide EDMS integration platform so Infor has attempted to ensure that GENCON is as generic as possible so the implementation of the Pathway-EDMS component of the integration can be supported by Pathway but controlled on a site by site (and perhaps EDMS product by EDMS product) basis on the EDMS side.

Miscellaneous Parameters

Communication & Information Type Lookup Maintenance Form



Communication & Information Type Lookup Maintenance Form

External Identifier
The External Identifier will represent the Equivalent Communication of Information Type in the External Product.

Communication Type
This field will display the Pathway Communication type that is mapped to the External Identifier. The Popup selection button may be used to select from the list of existing Communication Types. The Communication Types are defined within the Pathway Name and Address System.

>> Name and Address Register >> Name and Address Parameters >> Communication Type Parameters

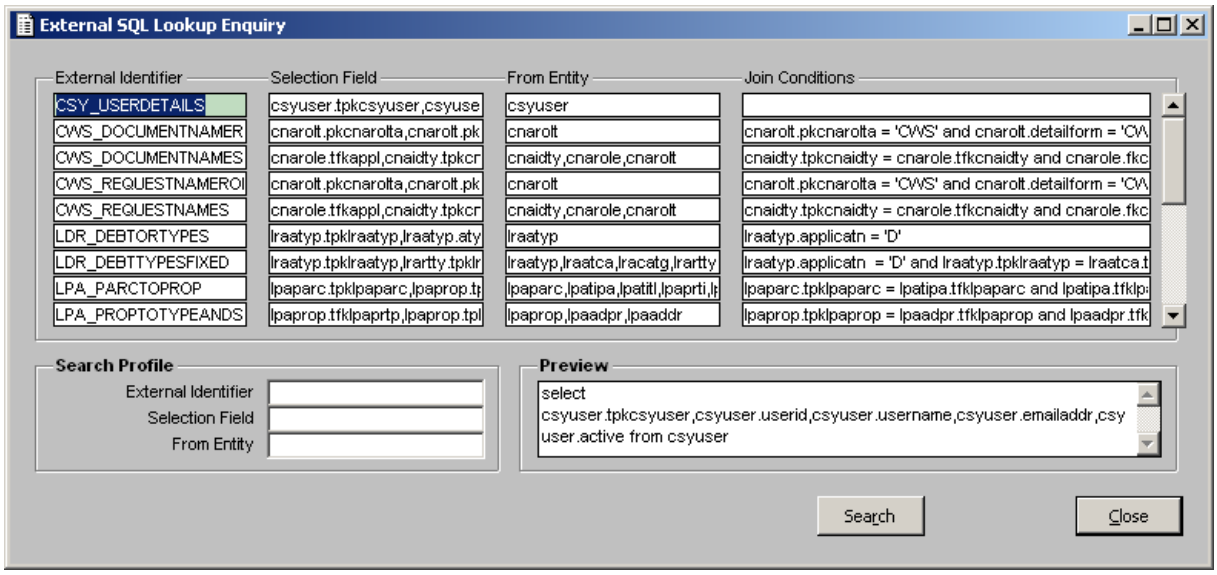
Information Type
This field will display the Pathway Information Type that is mapped to the External Identifier. The Popup selection button may be used to select from the list of existing Information Types. The Communication Types are defined within the Pathway Name and Address System.

>> Name and Address Register >> Name and Address Parameters >> Information Type Parameters

Insert
Use the Insert button to add additional records. An External Identifier may only link to either a Communication Type or an information type. You cannot link to both.

External SQL Lookup Maintenance

External SQL Lookup Enquiry



External SQL Lookup Enquiry

The External SQL Lookup Enquiry facility is an INFOR maintained Menu Option. Under no circumstances should council attempt to create additional External Queries

At present these queries are used by the WorkSmart product in order to retrieve information from the Pathway Database, in conjunction with a COMAPI.

External Identifier
The Identifier given to the SQL upon creation. These are defined by INFOR.

Selection Field
The Selection field will display the field level information that the SQL statement will select.

From Entity
The Entity field will display the Pathway entities that are used for the External query.

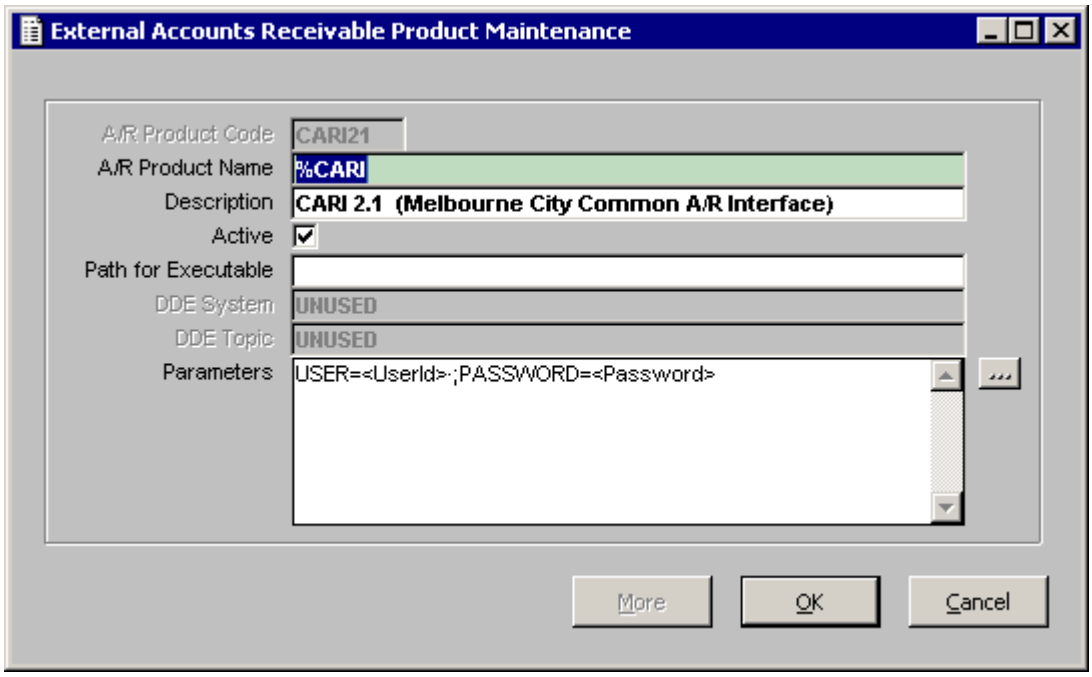
Join Conditions
The Join Conditions field will display the required joins between the entities used for the External Query.

This field is not maintainable.

Preview
This Preview Window will display the generated External SQL statement.

External Accounts Receivable Parameters

External Accounts receivable Product Maintenance



External Accounts Receivable Product Maintenance Form

The External Accounts Receivable Product Maintenance form is used to define parameters for interfacing with an external Product. These products are defined by INFOR.

A/R Product Name
The Product Name Code for the External Accounts Receivable Product. This code will be defined by INFOR in consultation with external product supplier

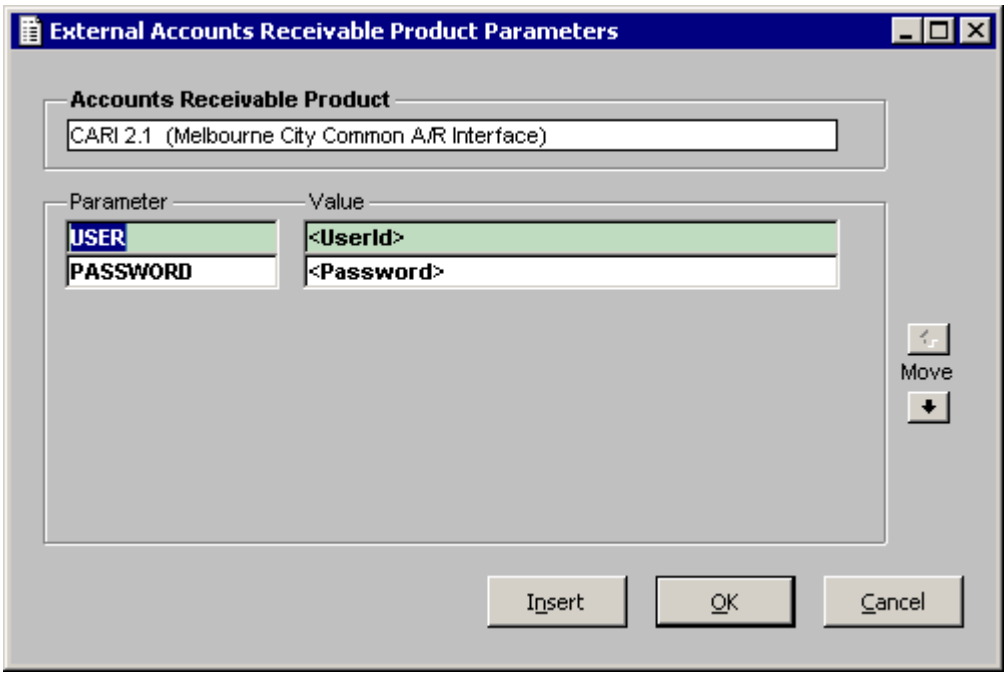
Description
Description of the External Accounts Receivable Product.

Active
This check box will indicate if this Interface is active for council.

Path for Executable
Enter the Path and executable for the external product. (if required)

Parameters
The required parameters will be displayed here. To update these parameters please use the detail button for Change Parameters. These parameters should only be updated in consultation with INFOR.

External Accounts Receivable Product Parameters



External Accounts Receivable Product Parameters

Accounts Receivable Product
This Product Code and Description will default from the front screen. These products can only be defined by INFOR.

Parameter
A list of the available/required parameters for this interface will be listed here

Value
Enter the appropriate value for the defined parameter. If you are unsure of the Parameter setting please contact INFOR.

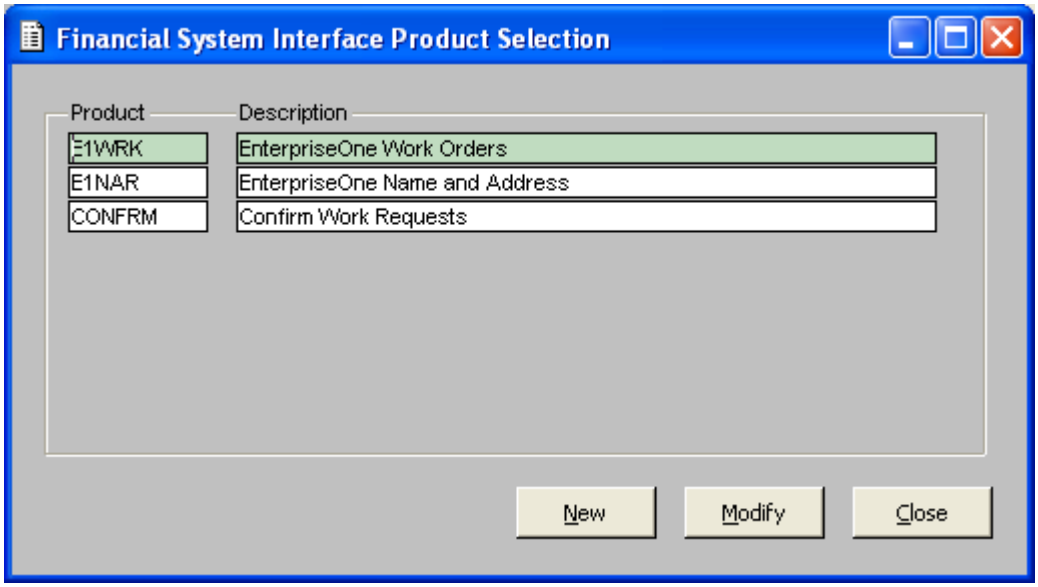
Financial Systems Parameters

Financial Systems Interface Product Maintenance

Financial System Interface Product Selection Form

Select the required interface to further define parameters. Current choices include

- EnterpriseOne Work Orders
- EnterpriseOne Name and Address
- Confirm Work Requests



Financial System Interface Product Selection Form

The Pathway to Confirm Interface allows council to create a Confirm Enquiry record from a Pathway Customer Service Request, via the use of the Confirm AM CRM Connector XML Schema (which uses Objects/Methods to pass data to Confirm). This method will return an immediate response of the Enquiry Number created, which will be stored in Pathway in a Work Order database table associated to the Customer Service Request.

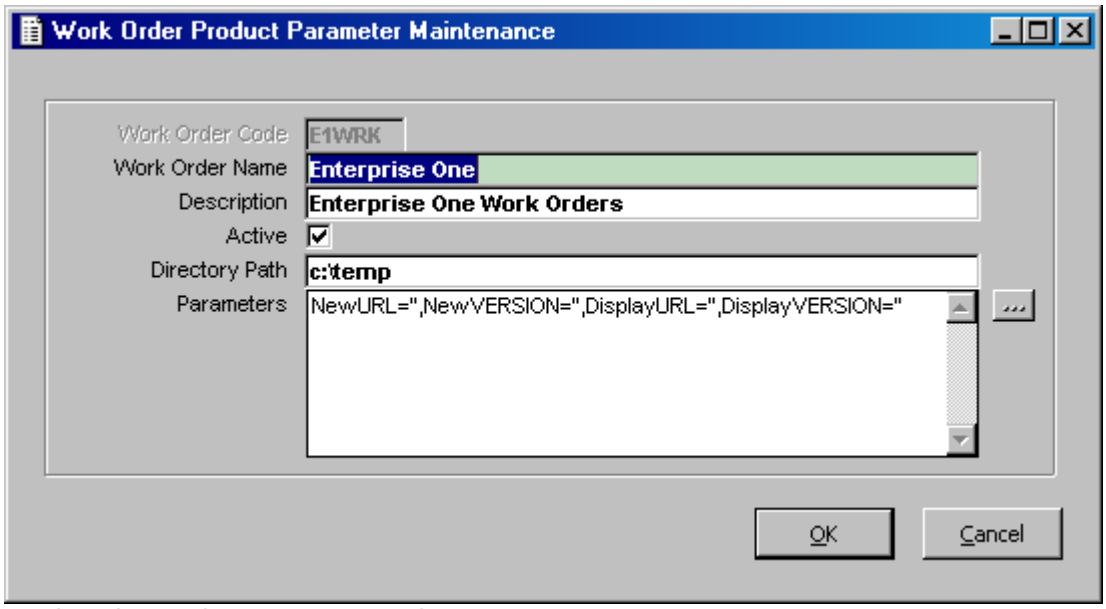
The creation of a Request will be managed by the Work Order Parameter on the Request Type and will be initiated via the 'OK' button on a new Request creation or via the Work Order Create option in the Associated menu

The other requirement as part of this interface is to manage the Site Code that is relative to Streets/Suburbs and Council owned Properties. These Site Codes may cover more than one Street/Suburb or many Site Codes may be related to one Street/Suburb.

These 'Site Code' Plans need to be defined within the Confirm Integration Parameters by selecting the relevant Plan Types to be stored in Confirm.

For further setup and processing information on these three interfaces, council should contact the Infor Helpdesk and request the setup documentation that is available.

Work Order Product Parameter Maintenance



Work Order Product Parameter Maintenance Form

Work Order Code
This field will contain the Work Order Product Code as defined by INFOR.

Work Order Name
This field will contain the Name of the Work Order Product.

Description
This field will contain a Description of the Financial Interface

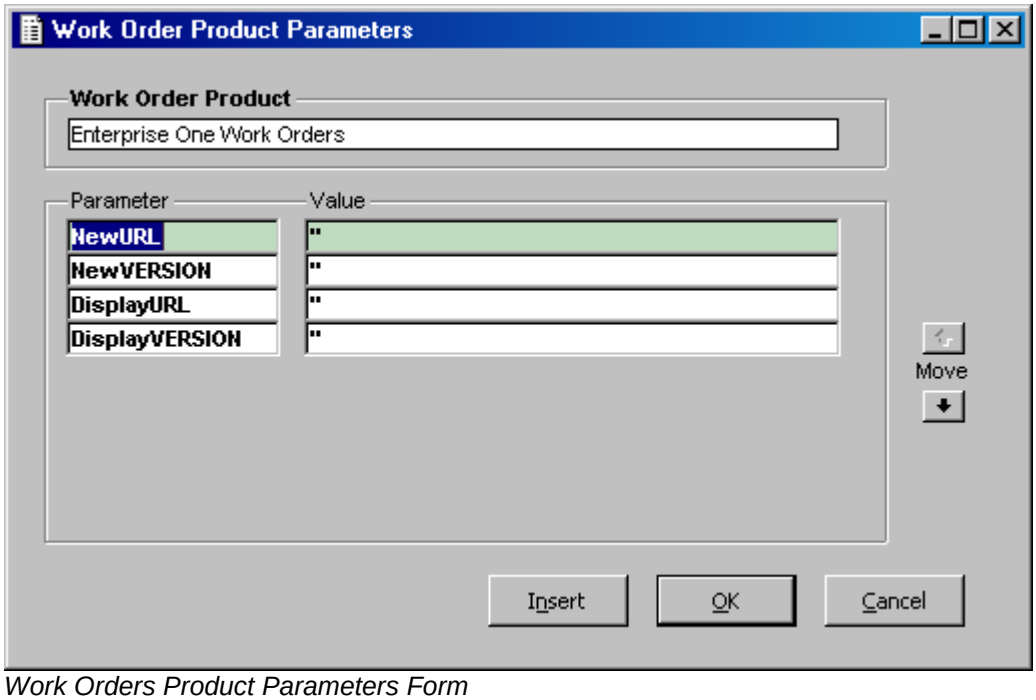
Active
This flag will indicate if this financial interface is active for council

Path for Executable
This field will hold the Path for an executable where required.

Parameters
This field will contain the parameters relevant to the financial interface where applicable. These parameters will be defined and maintained by INFOR.

Use the detail button to access the Work Order Produce Parameters form to define the required parameters for this interface.
** Council should refer to the Integration Setup Document that is available from the Infor Helpdesk for further information on setup requirements **

Work Order Product Parameters



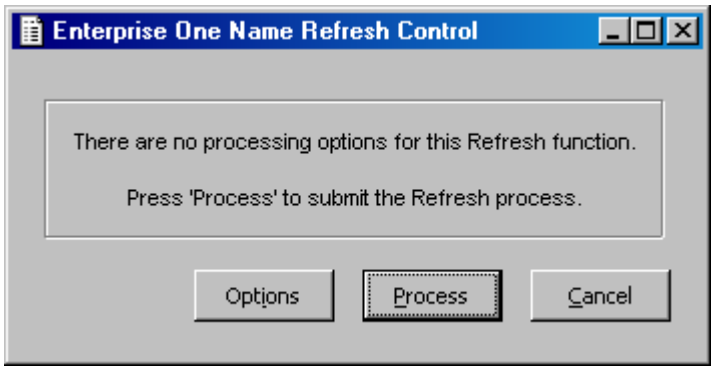
Work Orders Product Parameters Form

Parameters
Enter the Required Parameters as defined. For the purposes on the Enterprise One work Orders interface, these parameters will be defined by the Jigsaw Services Consultant as relevant to each site.

User the insert button to create additional parameters where required, and the move buttons allow for these parameters to be sequenced where required.

** Council should refer to the Integration Setup Document that is available from the Infor Helpdesk for further information on setup requirements **

EnterpriseOne Name and Address Refresh



EnterpriseOne Name Refresh Control

This option will interrogate CRPNA04 – Name details for the specific pre-determined run number and where records are located, another attempt will be made to update the names details into EnterpriseOne. Care must be taken to ensure that this process is run from a machine that has access to EnterpriseOne.

Access Menu Option System Administration >> Interfacing >> Enterprise One Name Refresh

There are no processing options for the Refresh process. Click on the Process button to run the Refresh. Where the details are successfully updated they will be removed from the database. If the name update fails the details will remain in the CRPNA04 entity and will be re-processed again the next time this process is run.

It is expected that council may have this job set as a permanent end of day job to run once a week or once daily to ensure that the EnterpriseOne and Pathway both have the correct information. However this option can be run at any time

DPID Parameters

DPID Product Parameters

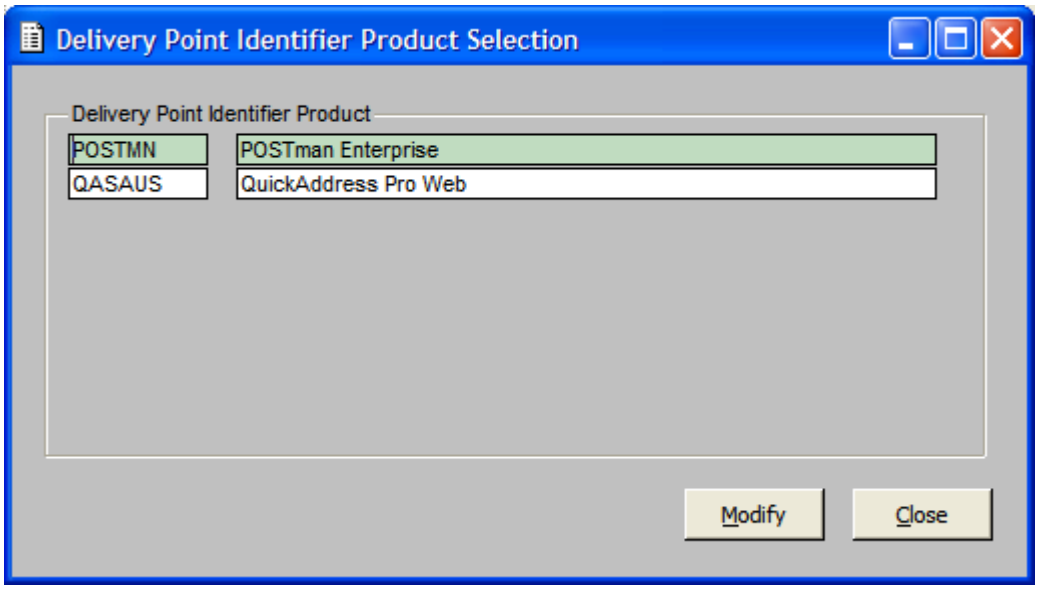
Note: This is an authorised function. This means that the functionality will only be available if you are authorised to use it. If customers do not have this option and require the functionality then it is advisable that they contact their account manager to organise the purchase of this function.

The DPID Product Parameters enable various DPID products to be set up and maintained for integration with Pathway.

Delivery Point Identifier Product Selection Form

At present POSTman Enterprise is the only DPID produce currently supported by INFOR. If councils have authority they may click on the Modify button to further define the DPID parameters for POSTman.

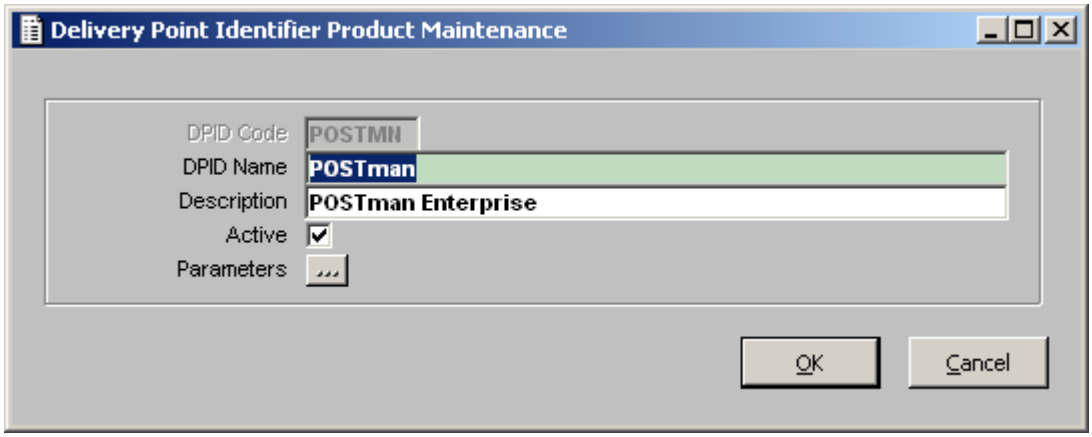
This form allows the selection of a DPID product for maintenance.



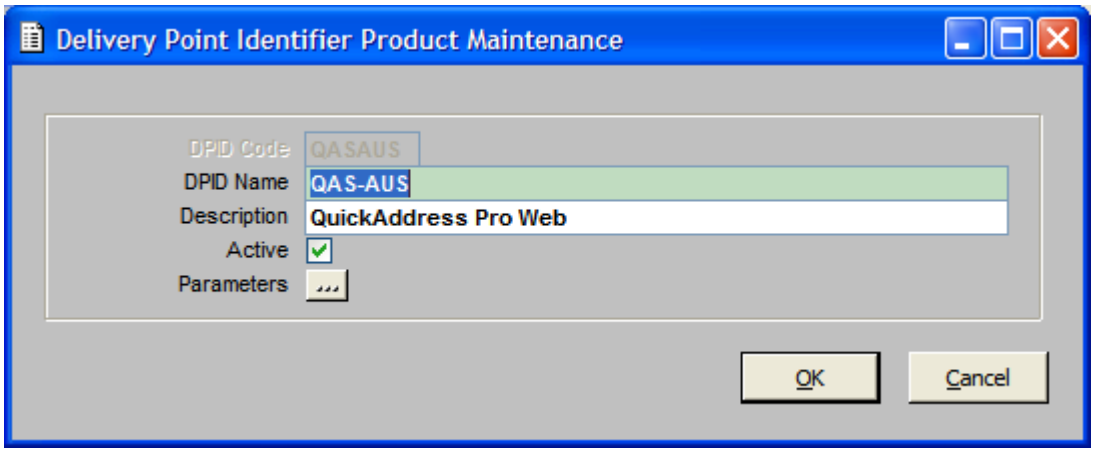
Delivery Point Identifier Product Selection Form

Delivery Point Identifier Product Maintenance

This form allows a DPID Product to be maintained. Parameters may be set up on the form accessed via the Parameters detail button.



Delivery Point Identifier Product Maintenance Form



DPID Code
This is the product code for the Delivery Point Identifier Product. This is controlled by INFOR.

DPID Name
This is the Product Name for the Delivery Point Identifier Product

Description
This field will contain the Description for the DPID Product.

Active
The Active check box will indicate if this Document Management Product is currently active. It will default to ON and can be left ON, as the System Parameters controls whether POSTman is in use or not.

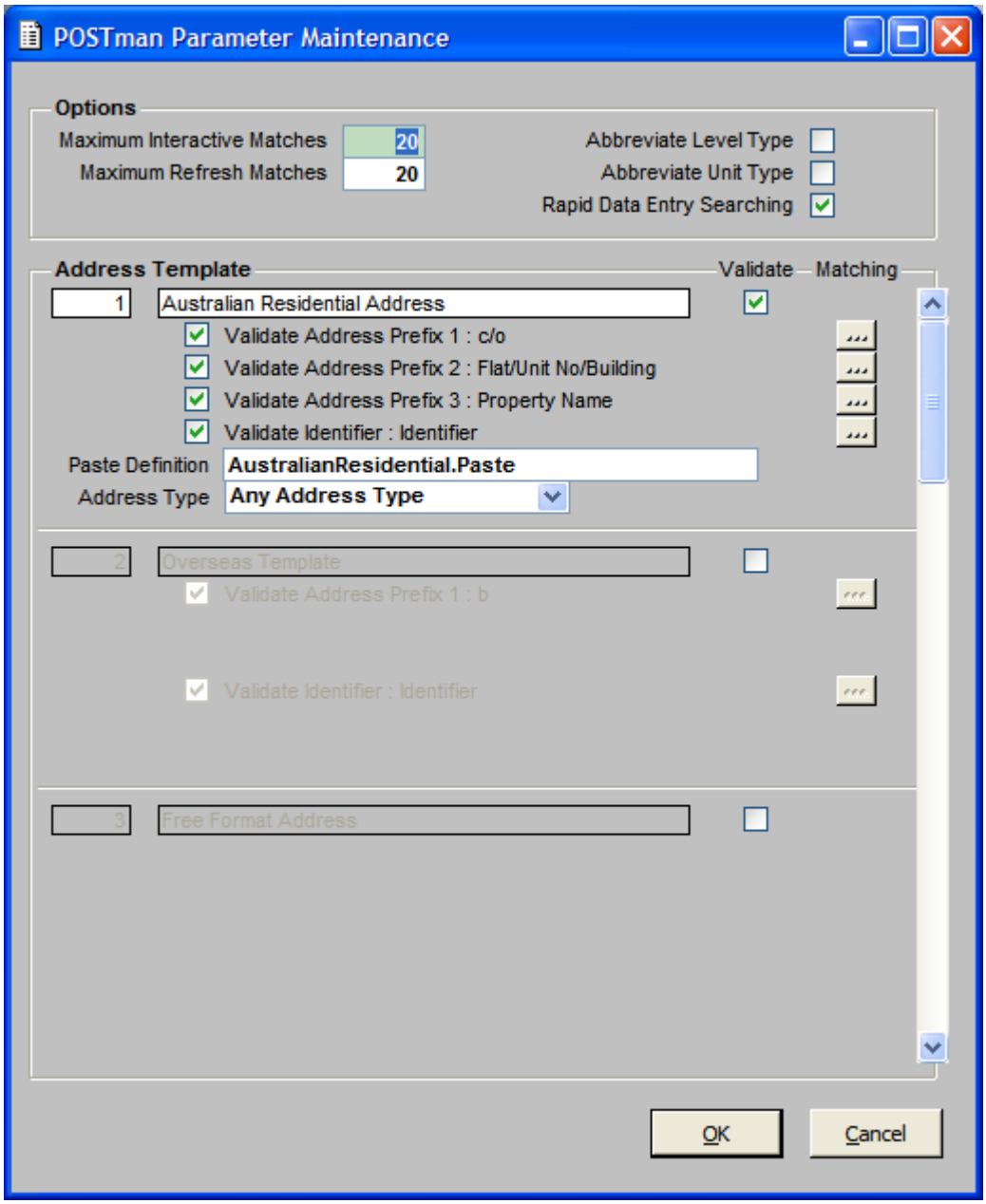
Parameters
Click on the detail button next to the Parameters to further define the DPID parameters for the DPID product. It allows various rules to be defined for the validation that is to apply over the various Name and Address templates.

POSTman Parameter Maintenance

Modifications have been made to the Name and Address Module (CNA) to accommodate the use of POSTman Rapid to find valid addresses and paste them into the Name and Address Register.

See further details on Postman Rapid Setup and Use in the Name and Address Module.

New fields have been added to the POSTman Parameter Maintenance form to control address searching and pasting using POSTman Rapid.



POSTman Parameter Maintenance Form

Options

The POSTman parameters will allow sites to tailor the processing that is performed by Pathway. The Maximum number of matches is used to control the amount of data that is returned to a User when the address entered is not a direct match to a POSTman address.

The field 'Rapid Data Entry Searching' has been added under the Options section at the head of the form. Setting this field on enables address searching and pasting using POSTman Rapid from the Address Maintenance and POSTman Near Match Selection forms; if it is not set on, this facility is not available.

Address Templates
POSTman validation can occur at the Template level and processing can be turned on or off here. Additionally components of the Template can then be excluded/included in the validation process as required by council.

Once the Address Template is being validated against the POSTman Postal Address File, further parameters need to be defined. These parameters are accessed via the Detail button next to each line of the Template.

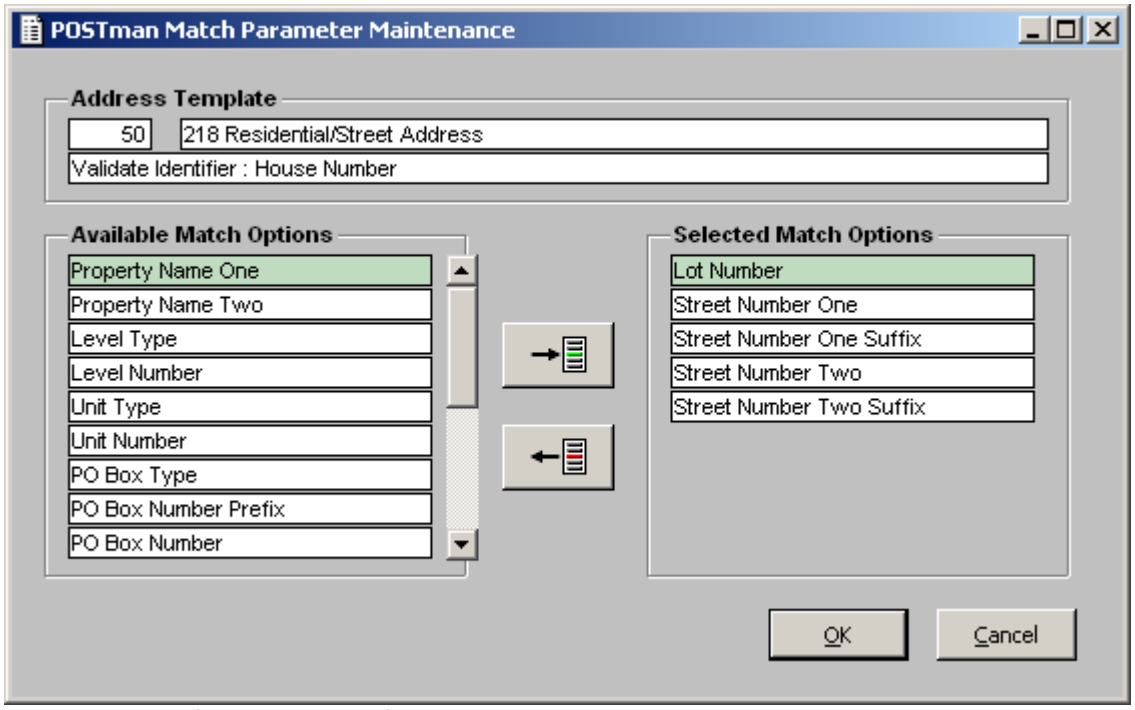
The fields 'Paste Definition' and 'Address Type' have been added to the Address Template records. These fields are available for an individual Template record when both the 'Rapid Data Entry Searching' flag and the Template's 'Validate' flag are set on. If the 'Rapid Data Entry Searching' flag is ON but the 'Validate' flag is OFF for a particular Template, address searching and pasting will NOT be available when entering an address using that Template.

The 'Paste Definition' field must contain the name of the Paste Action file created for the particular Template in POSTman Rapid. The entry MUST NOT contain the full path of the file; only the file name and the '.Paste' extension are required. If this entry is left blank for a particular Template, address searching and pasting will NOT be available when entering an address using that Template.

The 'Address Type' field is used to specify the type of address search that POSTman Rapid will undertake for an address being entered using the particular Template. The field can be set to 'Any Address Type', 'PO Box Addresses Only' or 'Street Addresses Only'.

In summary, for address searching and pasting to be available for an individual Template, the 'Rapid Data Entry Searching' flag must be ON, the Template's 'Validate' flag must be ON and the name of the Template's Paste Action file must be entered in the Template's 'Paste Definition' field.

POSTman Match Parameter Maintenance



POSTman Match Parameter Maintenance Form

This is a sample of the matching options that might be assigned to validate the House Number. The available fields are sourced from the POSTman product and should be matched to the appropriate data as held on the Templates within Pathway.

Council should refer to the POSTman Integration setup document that is available from the INFOR Helpdesk.

QAS-AUS Parameter Maintenance

Pathway now supports Address Validation via the QuickAddress Pro Web third-party DPID validation product. Note that the interactive use of this feature is supported in the Smart Client only.

SETUP INSTRUCTIONS

QuickAddress Pro Web must be installed following the instructions supplied with the QuickAddress softtware.

The files for the QuickAddress web server (customized for use with Pathway) are included on the Pathway release media, and are available in the .\msc\QuickAddress folder once the Release has been installed. This folder contains a folder named PathwayQas, which should be copied to the IIS web server folder structure on the server on which QuickAddress Pro Web is installed, for example: C:\Inetpub\wwwroot\PathwayQas . It will then be necessary to configure IIS to serve web pages from this location.

Infor currently intends to provide an installer to automate this process; in the meantime, please contact Infor Public Sector support for instructions.

Note that the QuickAddress Pro Web installer will install its own default web server pages in C:\Inetpub\wwwroot\ProWebCS if the installation option is specified when QuickAddress Pro Web is installed. These default pages are not customized for Pathway, and will not work with Pathway.

QAS-AUS Parameter Maintenance

Parameters for QAS-AUS are maintained on the QAS-AUS Parameter Maintenance form (accessed via the *System Administration* ► *Integration* ► *DPID Parameters* ► *DPID Product Parameters* menu option):-

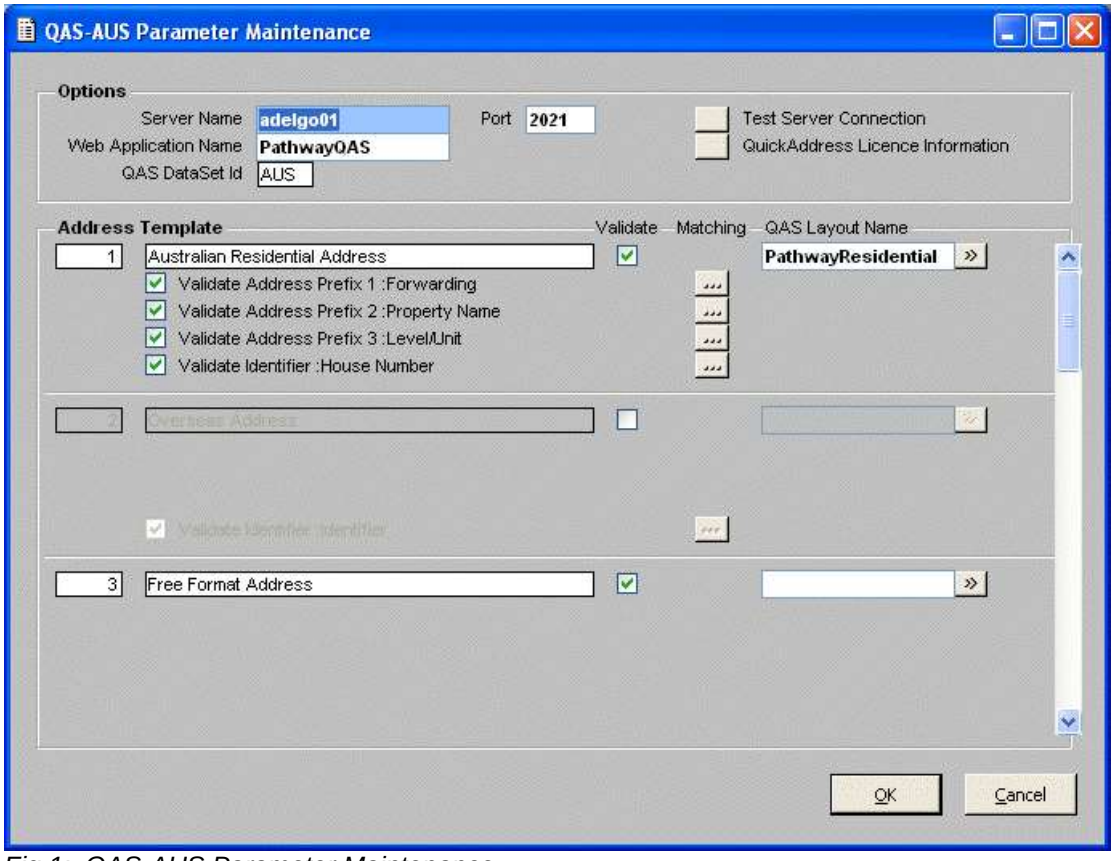


Fig 1: QAS-AUS Parameter Maintenance

On entering the form, a Licence Information request is automatically sent to the QuickAddress server (this may take a few moments). If the information returned indicates that the licence for the DataSet is due to expire within the next few weeks, a warning message will be displayed:-

Fig 2: QuickAddress Licence Status Warning

The licence information may be displayed at any time by pressing the QuickAddress Licence Information detail button in the Options area frame of the QAS-AUS Parameter Maintenance form, whereupon a Licence Information request will be sent to the QuickAddress server and the resulting information displayed in a pop-up window:-

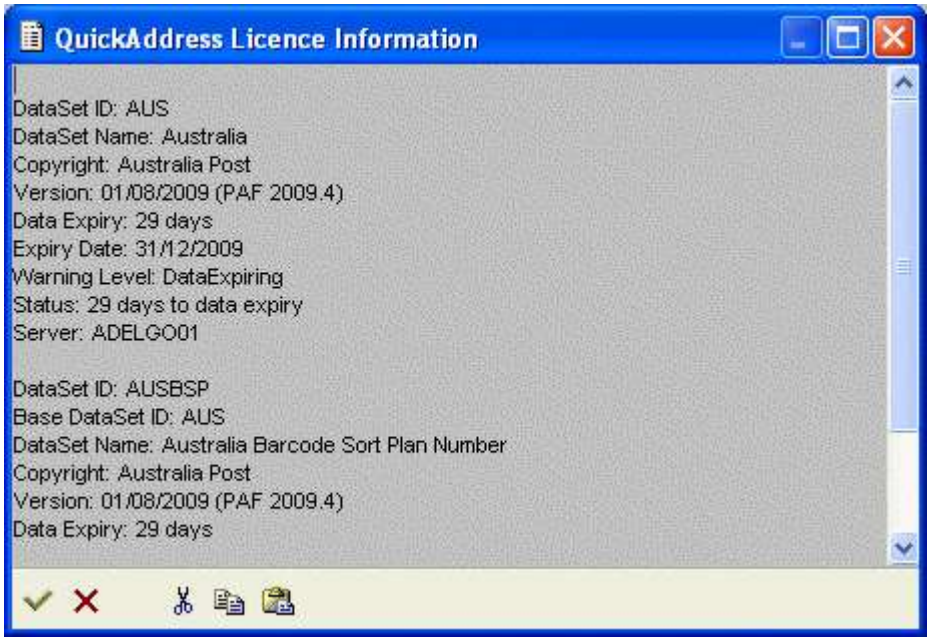


Fig 3: QuickAddress Licence Information

The connectivity to the QuickAddress server may be tested at any time by pressing the Test Server Connection detail button in the Options area frame of the QAS-AUS Parameter Maintenance form, whereupon a CanSearch request will be sent to the QuickAddress server and an appropriate message box displayed:-

Fig 4: QuickAddress DataSet available

If the server cannot be contacted, or the AUS DataSet is not available for any reason, the message will include an indication of the problem:-

Fig 5: QuickAddress DataSet not available

The list of Address Templates on the QAS-AUS Parameter Maintenance form may be used to define which Pathway Address Templates are to trigger validation via QuickAddress. To be valid for use with QuickAddress, an Address Template must have the Validate checkbox checked on, and a QuickAddress Layout must be selected. If the Validation checkbox is checked off, or no QuickAddress Layout is selected, addresses based on the Address Template will not be validated.

The QAS Layout Name pop-up button may be used to call the QuickAddress Layout Pop-Up form to allow the desired Layout to be selected:-

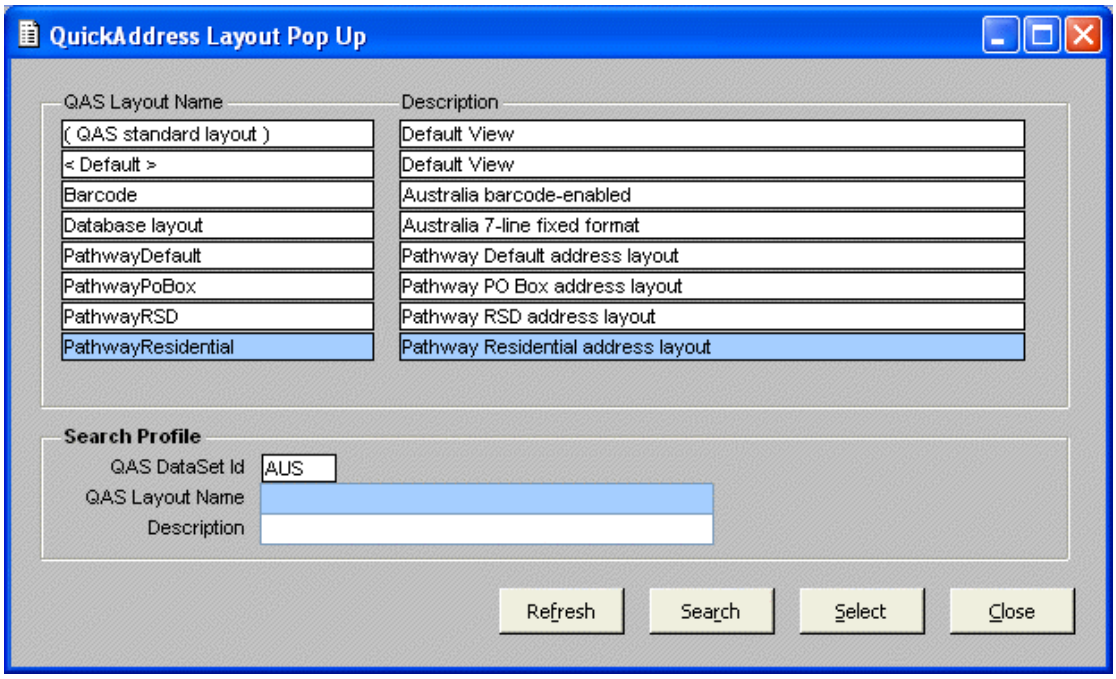


Fig 6: QuickAddress Layout Pop-Up

The form retrieves the list of valid Layouts for the AUS DataSet from the QuickAddress server. The currently-selected Layout from the QAS-AUS Parameter Maintenance form will be highlighted.

The Select button may be used to return the selected Layout to the QAS-AUS Parameter Maintenance form.

The Search button may be used in conjunction with the Search Profile fields to display a subset of the Layouts returned by the QuickAddress server.

The Refresh button may be used to re-retrieve the list of valid Layouts from the QuickAddress server.

Note: When selecting a QuickAddress Layout for use with a Pathway Address Template, the elements of the Layout must be configured to match the components of the Template.

QuickAddress Layouts

QuickAddress Layouts are created and modified via the QuickAddress Configuration Editor (QACFGWN.EXE) in the QuickAddress Pro Web program folder.

Fig 7: QAS Configuration Editor icon

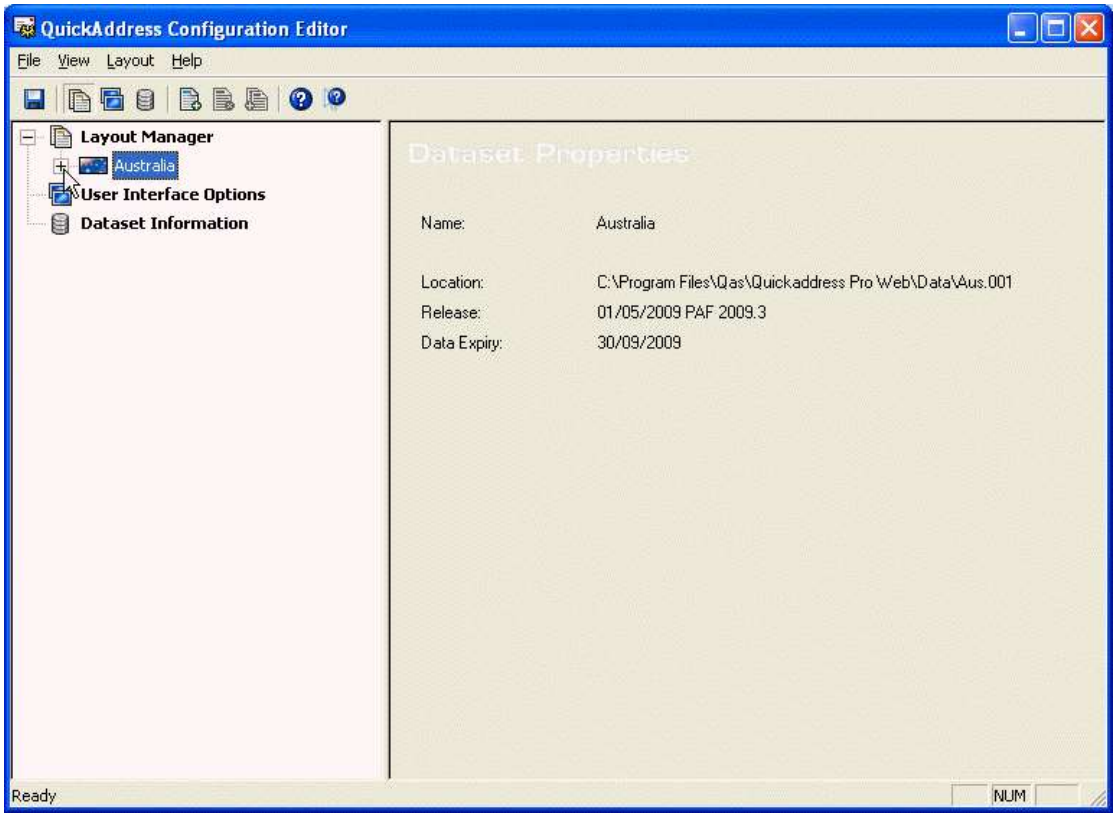


Fig 8: QuickAddress Configuration Editor – DataSet Properties

Expand the node for the 'Australia' DataSet (under the Layout Manager node) to display a list of existing Layouts.

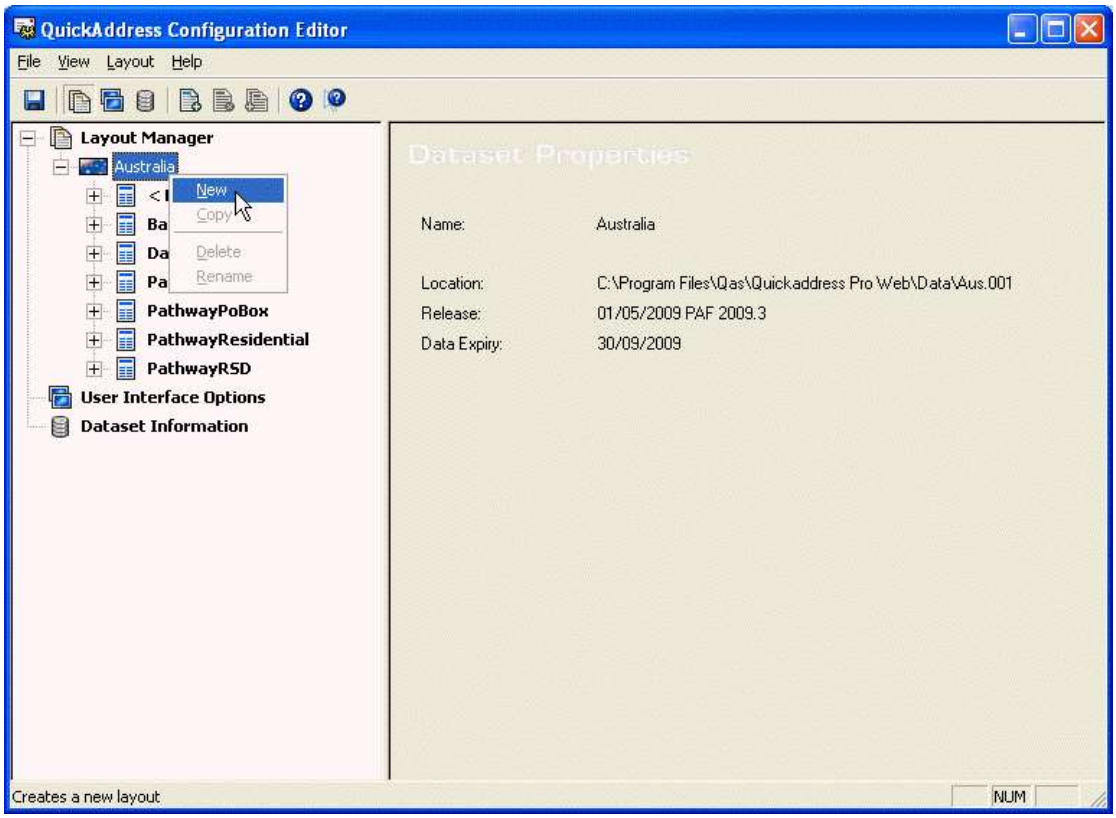


Fig 9: QuickAddress Configuration Editor – creating a new Layout

Right-click on the Australia node and select New to create a new Layout; or right-click on an existing Layout node and select Copy to create a new Layout by copying the selected Layout.

Expand the selected Layout node to define the Layout.

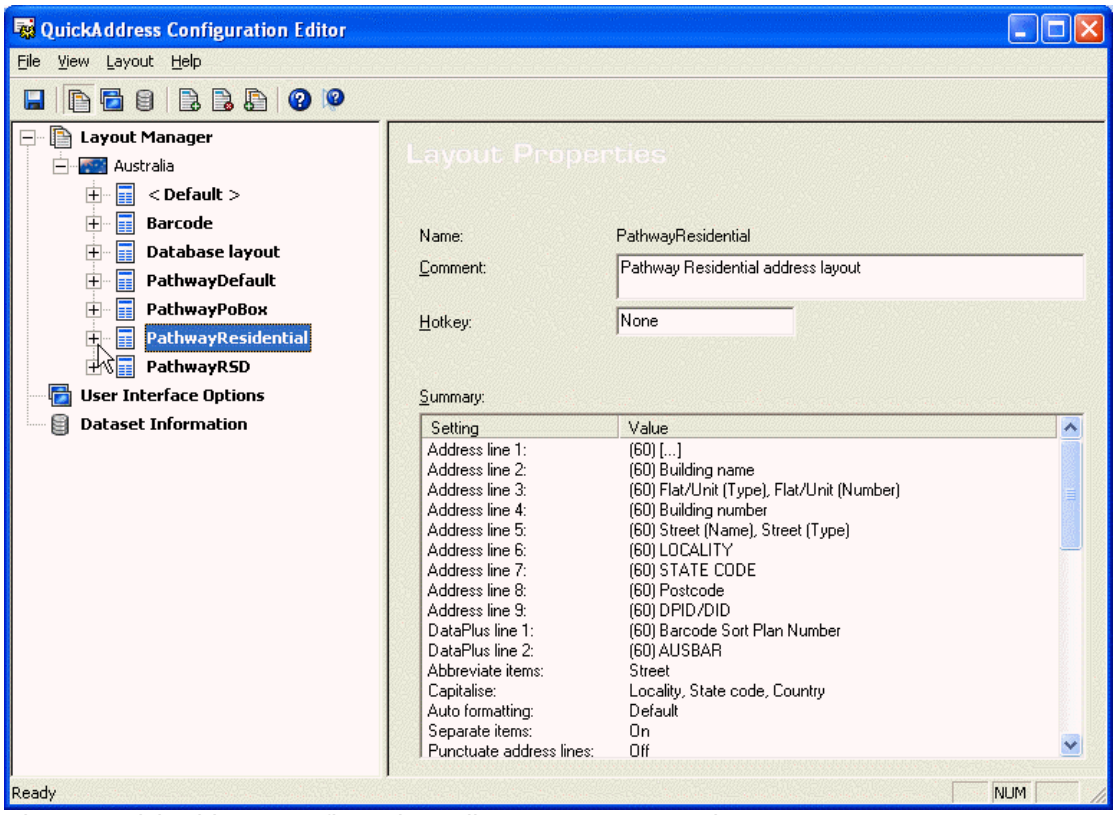


Fig 10: QuickAddress Configuration Editor – Layout Properties

Define the address elements to be returned by the Layout by selecting the 'Address format' and 'DataPlus' nodes (see *Fig.11* and *Fig 12* below). Use the 'Insert line', 'Delete line', 'Fix element' and 'Unfix element' buttons' for this purpose.

Note that the selected address elements must appear in the Layout in the same order that the matching address components appear in the Pathway Address Template. The DIPD, Barcode Sort Plan Number and AUSBAR barcode must appear (in that order) in the Layout immediately following the last matching address element.

Select the 'Address format' and 'DataPlus' nodes

When defining the Street element on the Address Format panel, the Street(Name) element must be concatenated with the Street(Type).

Press the Save button when the Layout definition is complete

Note: A full description of the use of the QuickAddress Configuration Editor is beyond the scope of this document. Please refer to the QuickAddress documentation or training materials for more information.

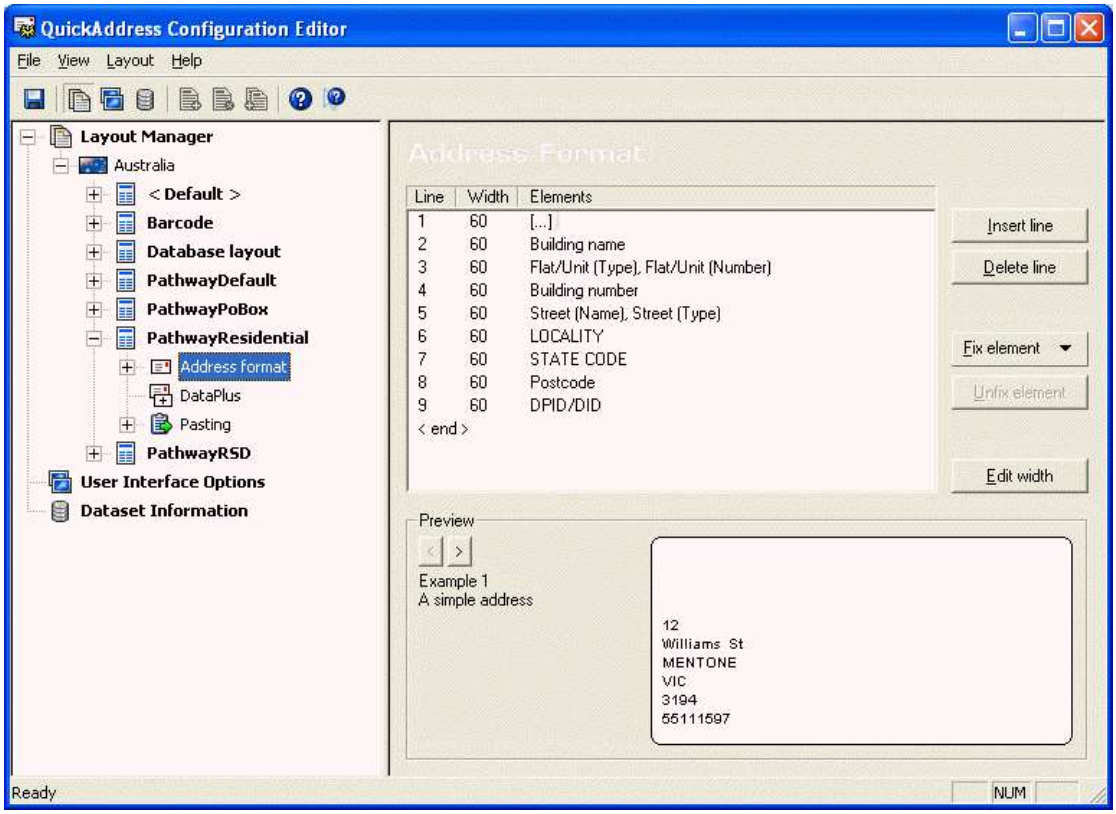


Fig 11: QuickAddress Configuration Editor – Address Format

Select the DataPlus node to include the DataPlus items (Barcode Sort Plan Number and AUSBAR barcode) in the Layout.

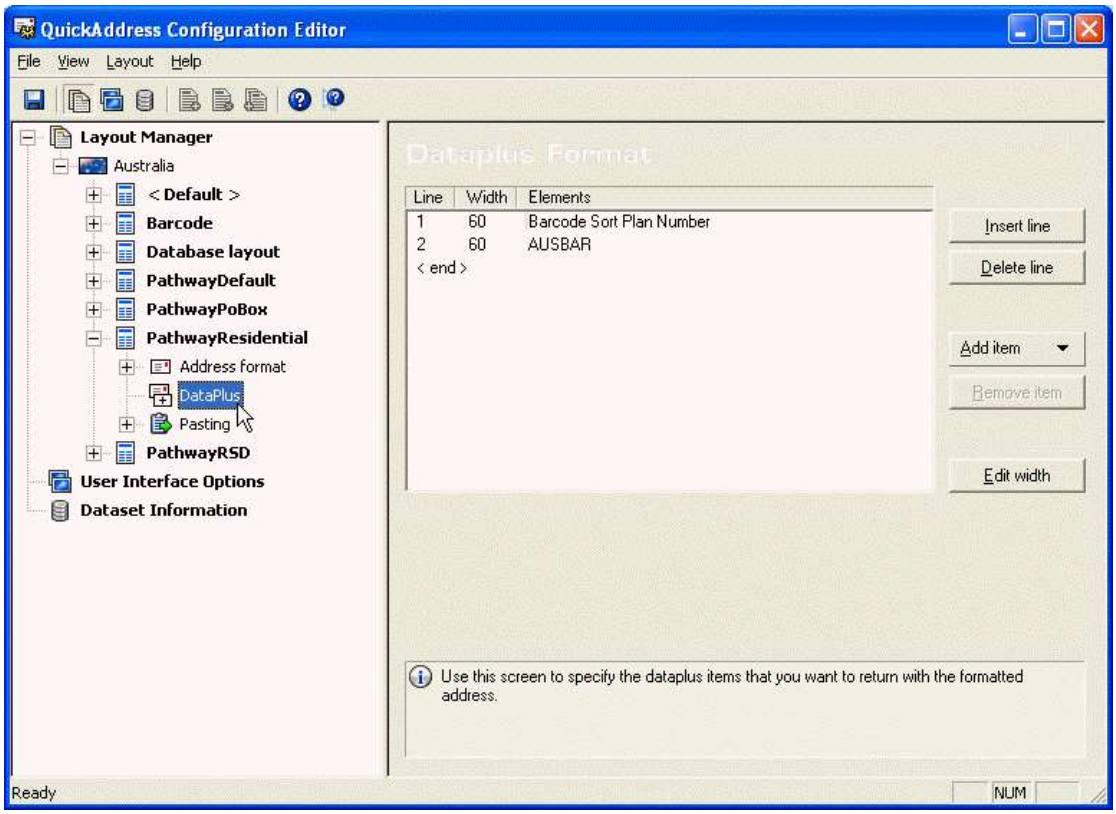


Fig 12: QuickAddress Configuration Editor – DataPlus Format

When defining the QuickAddress Layout, the 'Separate address elements' checkbox must be checked on in the Address Format Options (see *Fig 13* below).

Whether or not the QuickAddress Layout template specifies that street name qualifiers should be abbreviated (see *Fig 13* below) depends on how the street component address qualifiers are defined in Pathway.

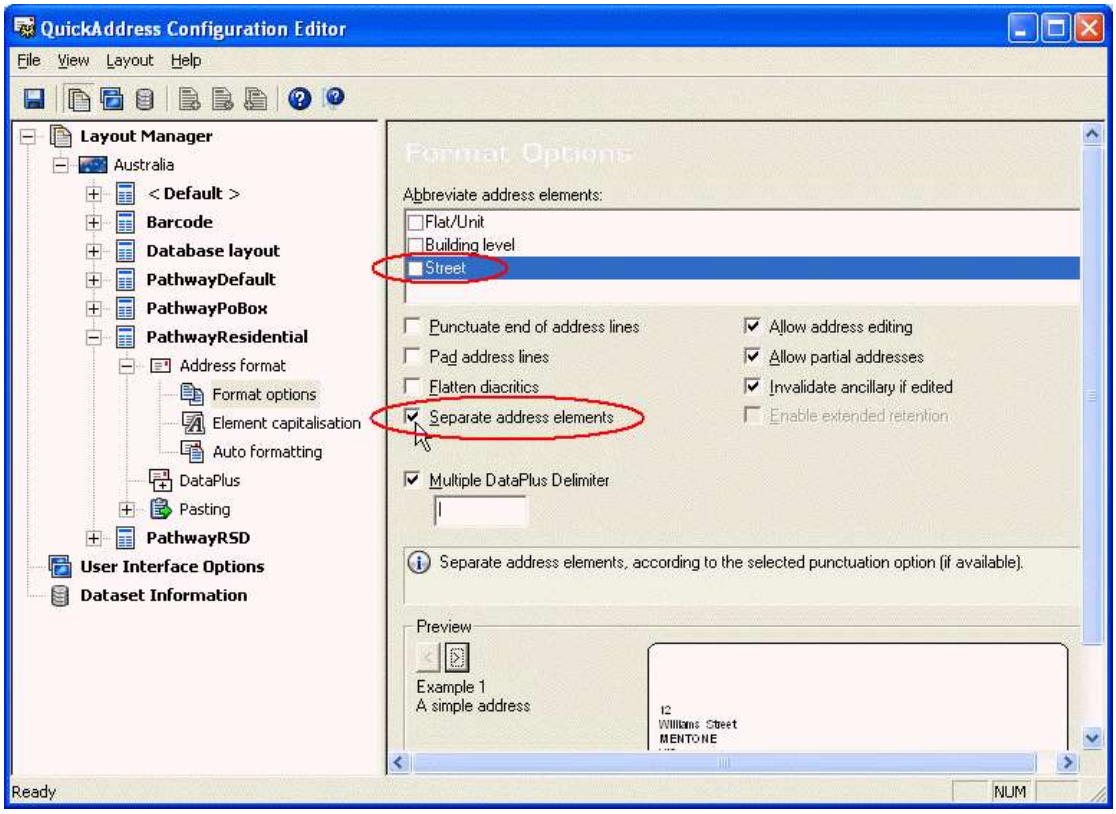


Fig 13: QuickAddress Configuration Editor – Format Options

If the street Component Type in Pathway specifies that qualifiers should be used (i.e. the Use Qualifier checkbox for the Component Type is checked on), the 'Abbreviate Street' check box for the QuickAddress Layout should be checked on or off according to whether or not the qualifier definitions for the street component include an abbreviation.

If the street component qualifier definitions all include an abbreviation (*Fig 14a*), the 'Abbreviate Street' check box for the QuickAddress Layout may be checked either on or off.

Fig 14a: Address Component Qualifiers – with Abbreviations

If some street component qualifier definitions have no abbreviation, the 'Abbreviate Street' check box should be checked off. **Note:** This is the most likely – and recommended – scenario.
If none of the street component qualifier definitions include an abbreviation (*Fig 14b*), the 'Abbreviate Street' check box for the QuickAddress Layout should be checked off.

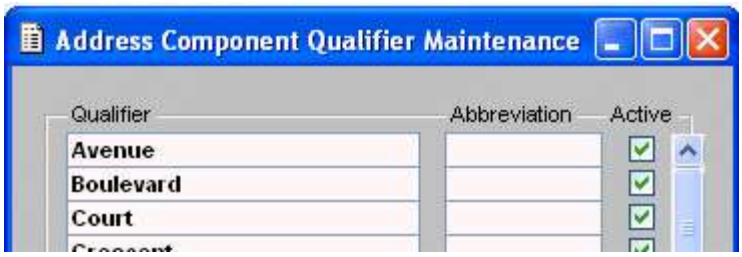


Fig 14b: Address Component Qualifiers – with no Abbreviations

If the street component qualifiers are defined in abbreviated form (*Fig 14c*), the 'Abbreviate Street' check box for the QuickAddress Layout should be checked on.

Fig 14b: Address Component Qualifiers – in abbreviated form

If the street Component Type in Pathway specifies that qualifiers should not be used (i.e. the Use Qualifier checkbox is checked off), then the qualifier will be assumed to be included as part of the street name. In this case the 'Abbreviate Street' check box for the QuickAddress Layout should be checked on or off according to Council's data entry standard for the abbreviation of street name qualifiers.

The QuickAddress User Interface

The QuickAddress user interface is invoked when the New button is pressed on the Address Search Profile form. Typically the required address will not have been found following an address search within Pathway, and the operator will seek to create a new address via the New button.

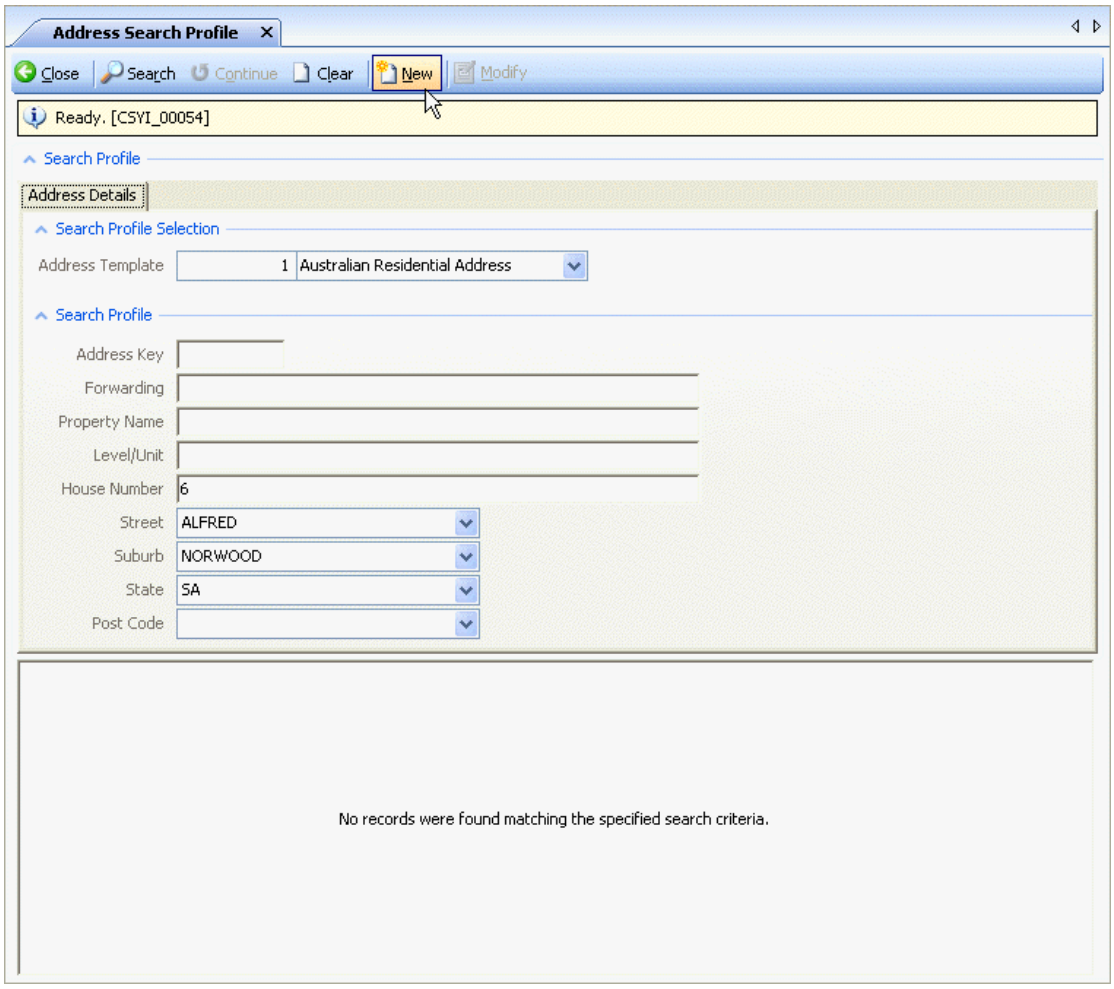


Fig 15: Address Search Profile

If QuickAddress is in use, Pathway will first check that the selected Address Template is valid for use with QuickAddress (i.e. the Template must have the Validate checkbox checked on and a QuickAddress Layout selected in the QuickAddress parameters).

If the Address Template is not valid for use with QuickAddress, Pathway will continue on to the Address Maintenance form as normal.

If the Template is valid for use with QuickAddress, Pathway will invoke the QuickAddress user interface, which will appear in Single Line mode with the search field pre-populated with the address details from the Address Search Profile form (the operator may use the radio buttons to switch between Single Line and Typedown modes at any time).

Note: A full description of the use of the QuickAddress user interface is beyond the scope of this document. Please refer to the QuickAddress documentation or training materials for more information.

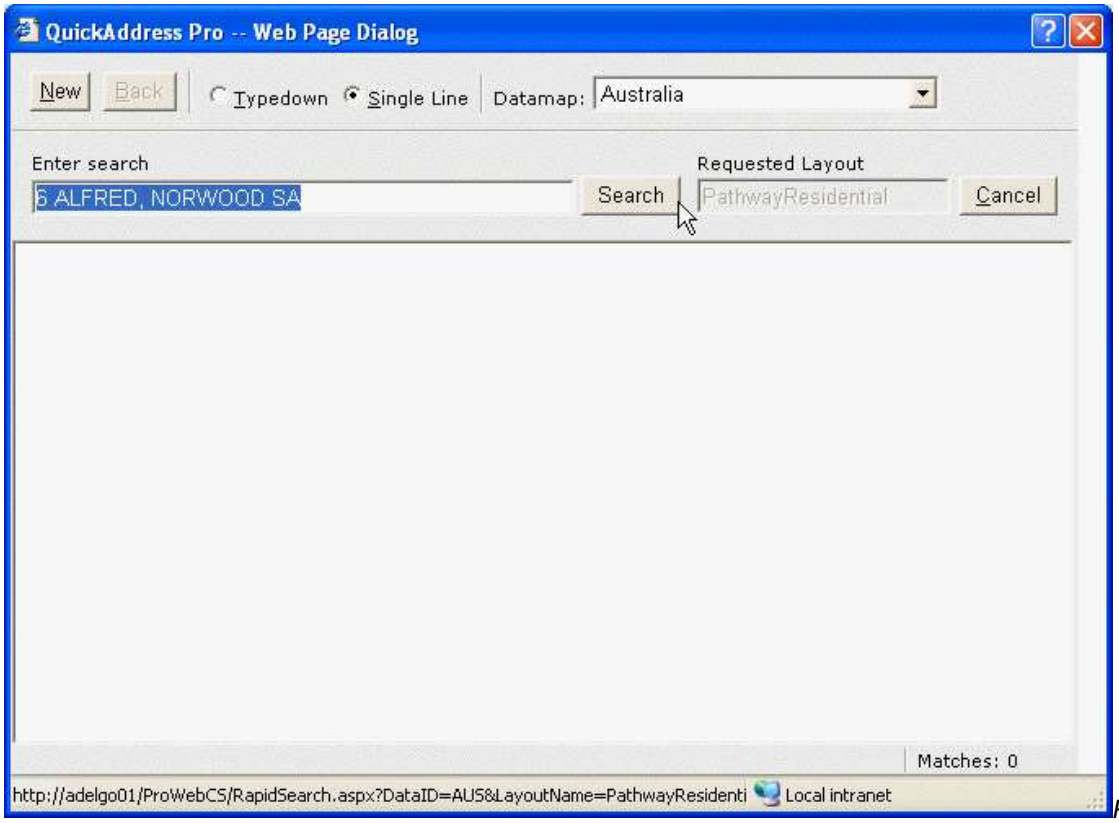


Fig 16: QuickAddress user interface – Single Line mode

Pressing the Search button will cause QuickAddress to return a list of addresses that match the search criteria

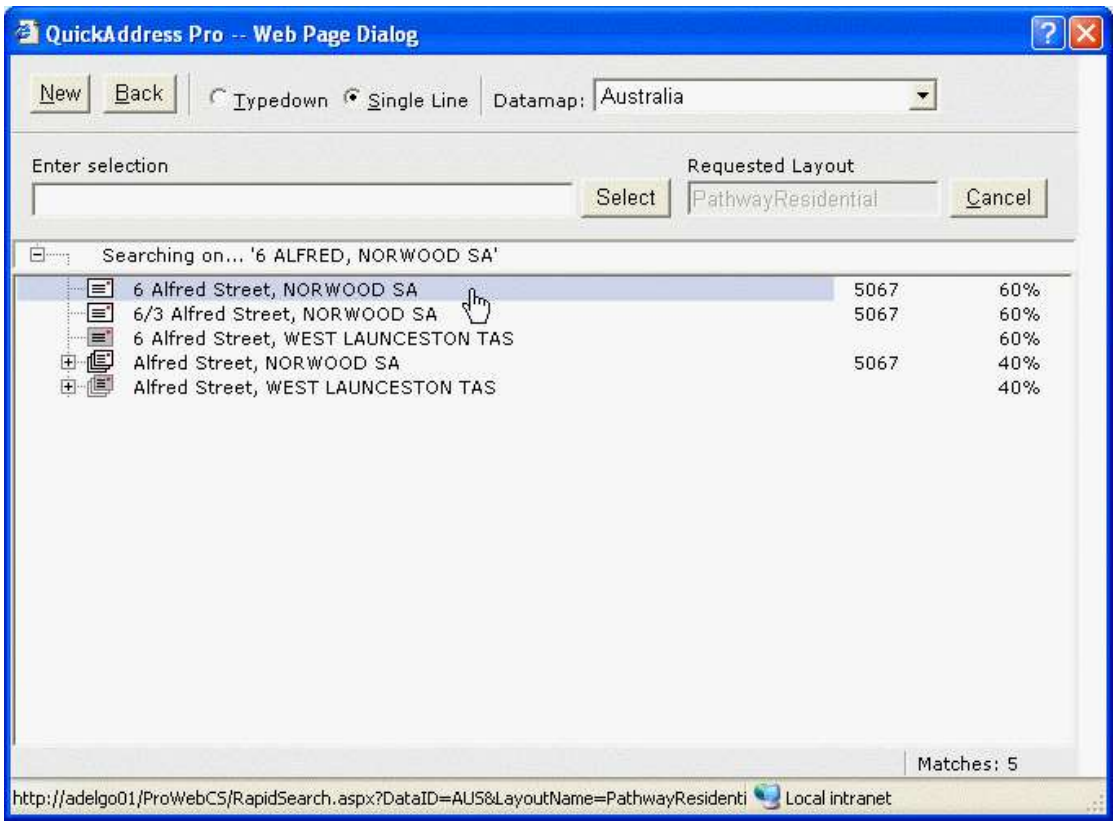


Fig 17: QuickAddress user interface – Single Line mode – displayed matches

Selecting one of the addresses and pressing the Select button will cause QuickAddress to display the selected address for confirmation:

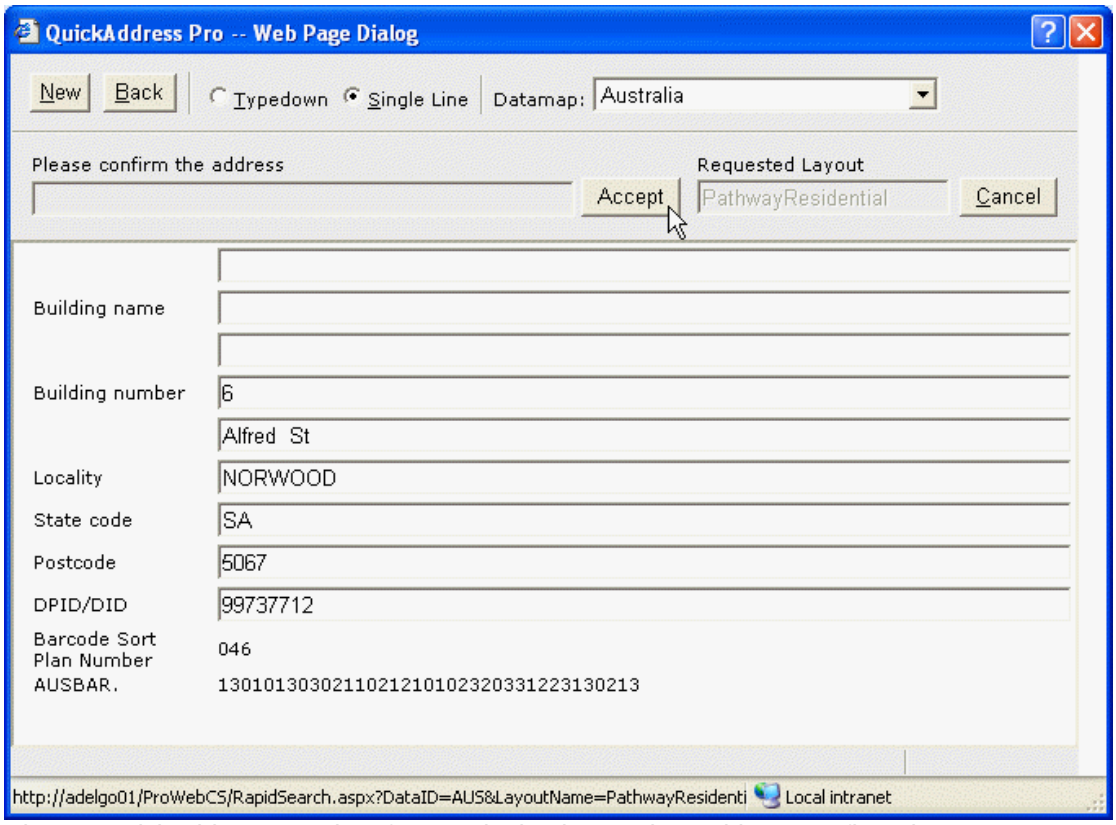


Fig 18: QuickAddress user interface – Single Line mode – address confirmation

Pressing the Accept button will cause the selected address to be returned to Pathway and displayed in the Address Maintenance form.

The Back button may be used to step backwards through the user interface search process at any time, or a new search may be started via the New button. The Cancel button may be used to cancel the search process and return to Pathway, where the Address Maintenance form will be displayed showing the address details from the Search Profile form.

Note: Before Pathway calls the QuickAddress user interface, the licence information for the QuickAddress DataSet will be requested from the QuickAddress server. If the server issues a licence status warning, Pathway will display the warning to the operator:

Fig 19: Licence Status warning

Warning messages are only displayed to the same operator once per session.

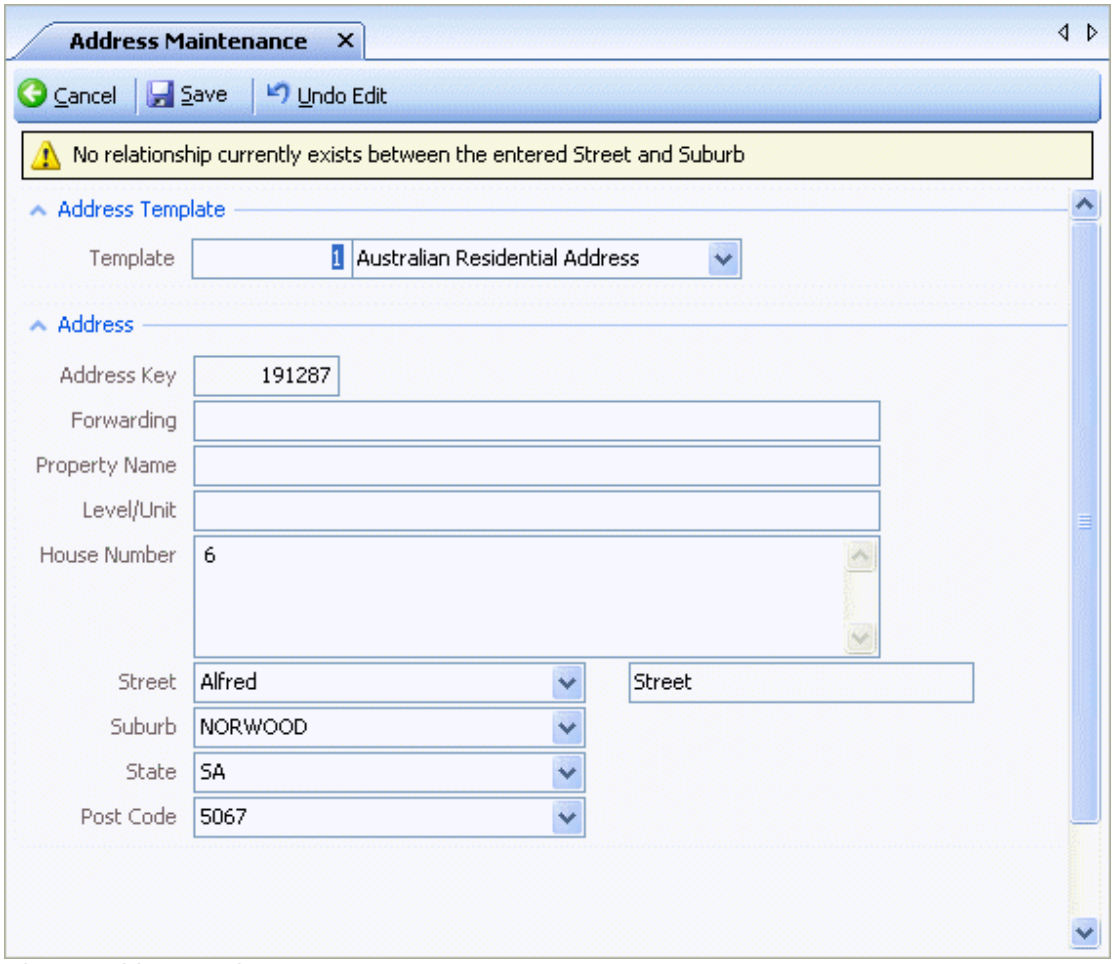


Fig 20 Address Maintenance

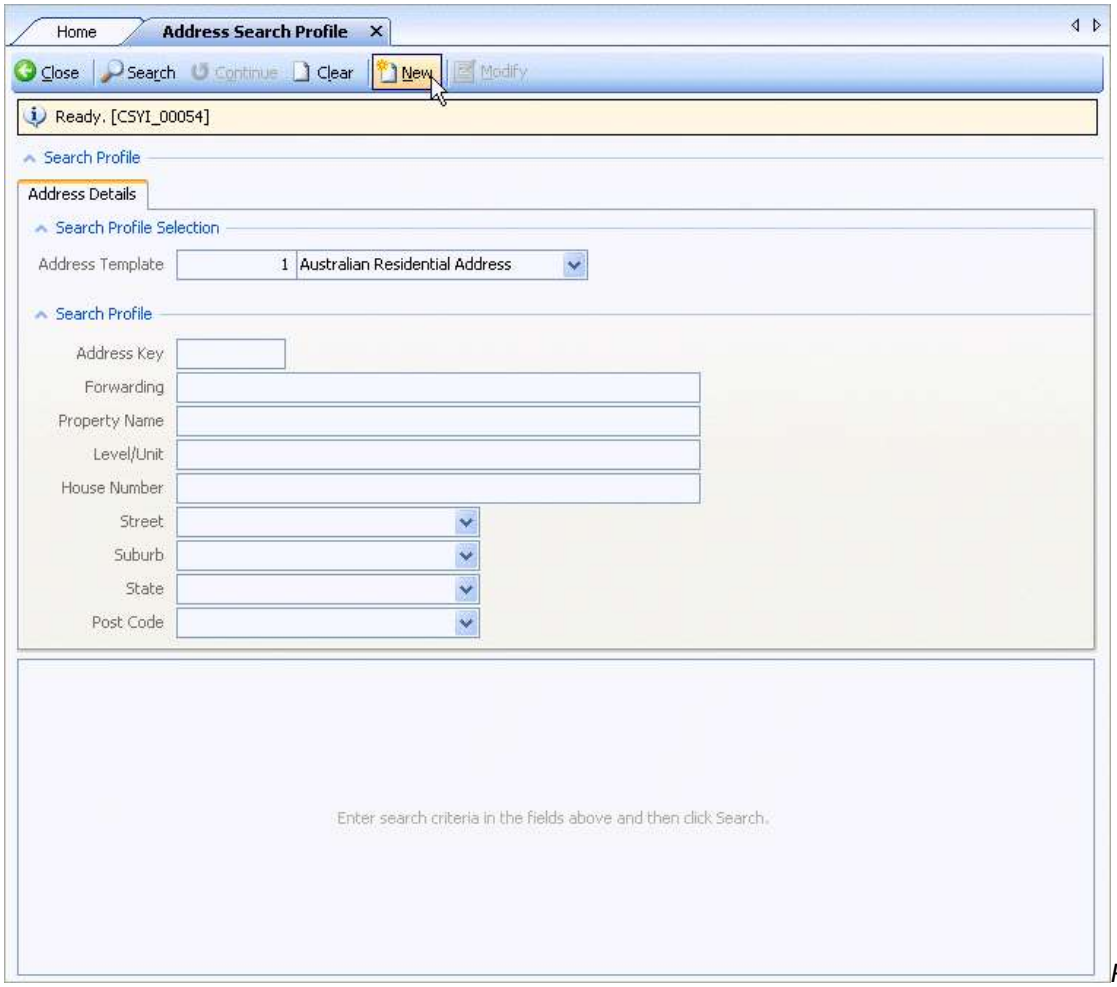


Fig 21: Address Search Profile

If the New button on the Address Search Profile form is pressed and there are no address details entered in the search profile fields, the QuickAddress user interface will be called in Typedown mode (the operator may use the radio buttons to switch between Typedown and Single Line modes at any time).

Typedown mode allows the operator to start by entering a broad term such as the postcode or suburb, and refine the search by narrowing it down to street name, then building number. The typedown process is designed to allow an address to be located and selected with minimal typing.

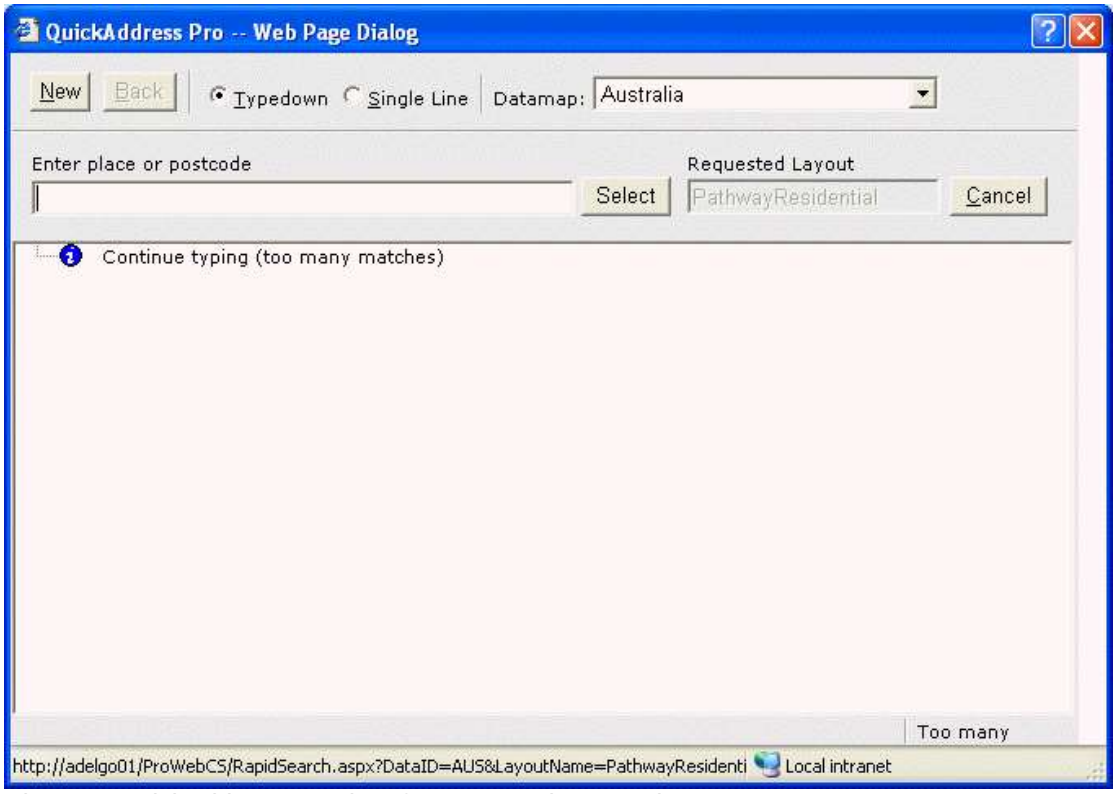


Fig 22a: QuickAddress user interface – Typedown mode

In this example, entering a valid postcode results in the postcode being displayed in the tree:

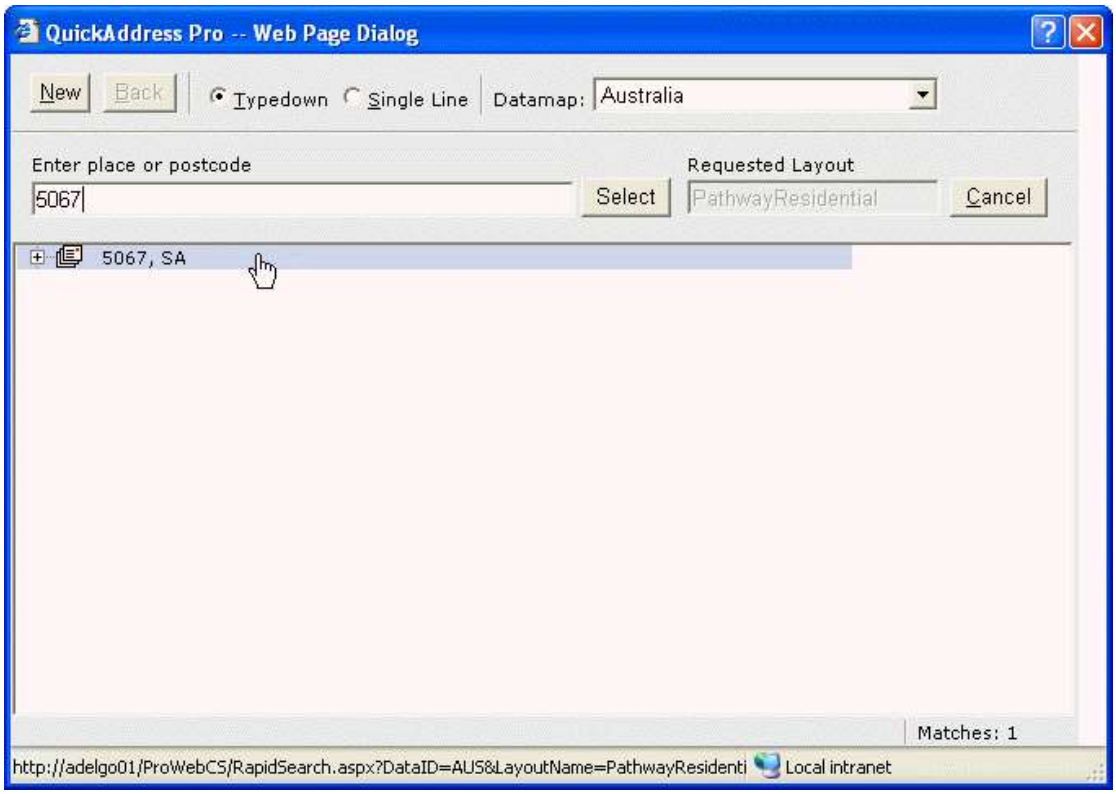


Fig 22b: QuickAddress user interface – Typedown mode – Post Code entry and selection

Selecting the postcode (either by pressing the Select button ort the Enter key), then entering the first few letters of the street name updates the tree showing all matching street names for the selected postcode:

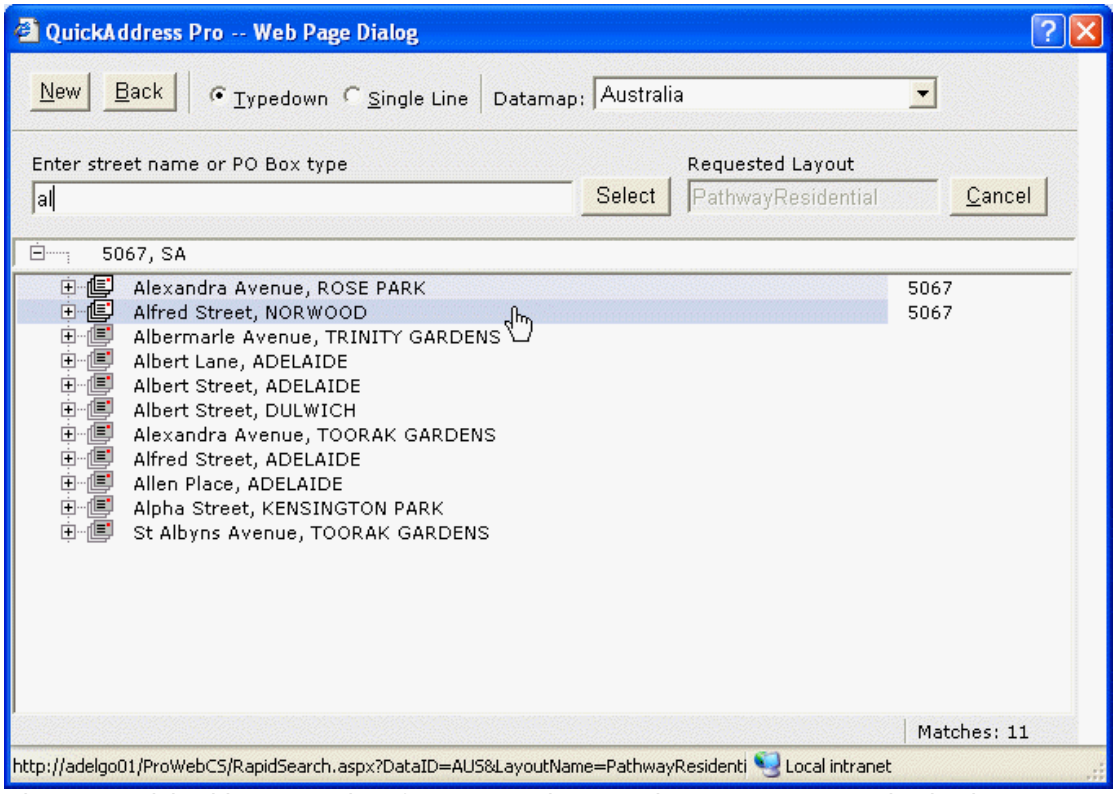


Fig 22c: QuickAddress user interface – Typedown mode – Street entry and selection

Selecting the street causes the building numbers for the street to appear in the tree:

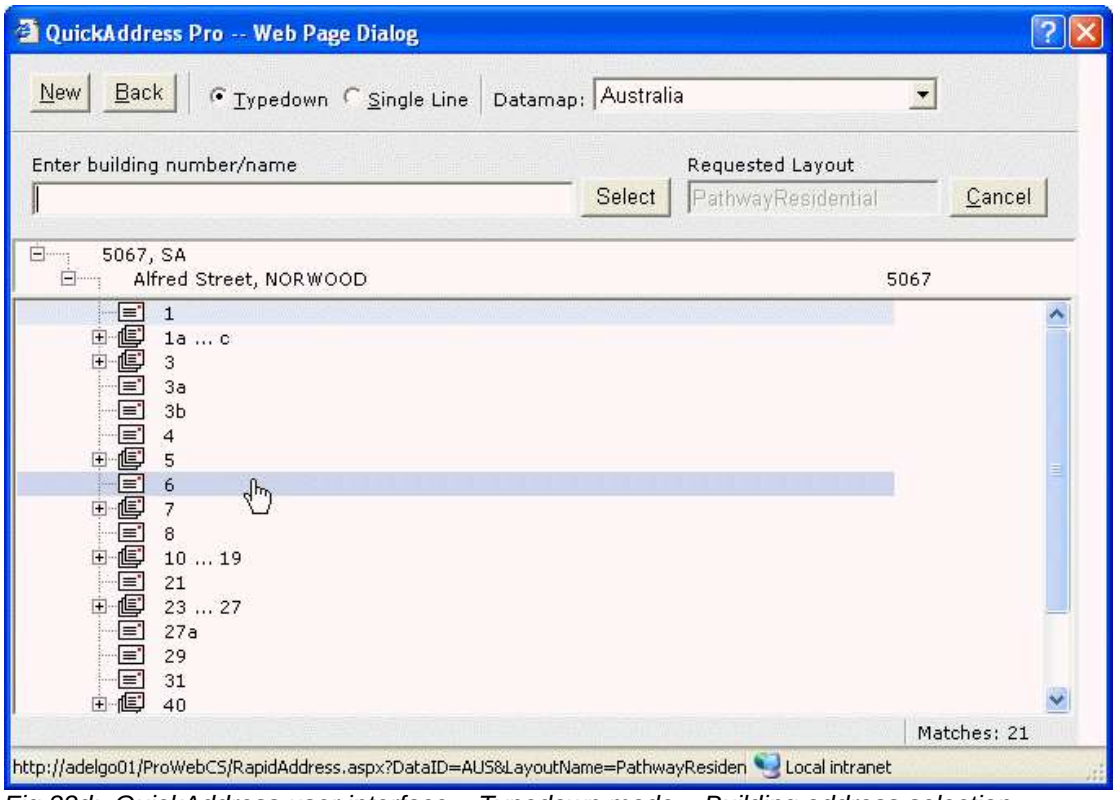


Fig 22d: QuickAddress user interface – Typedown mode – Building address selection

Selecting the building number will cause QuickAddress to display the selected address for confirmation, as for Single Line mode:

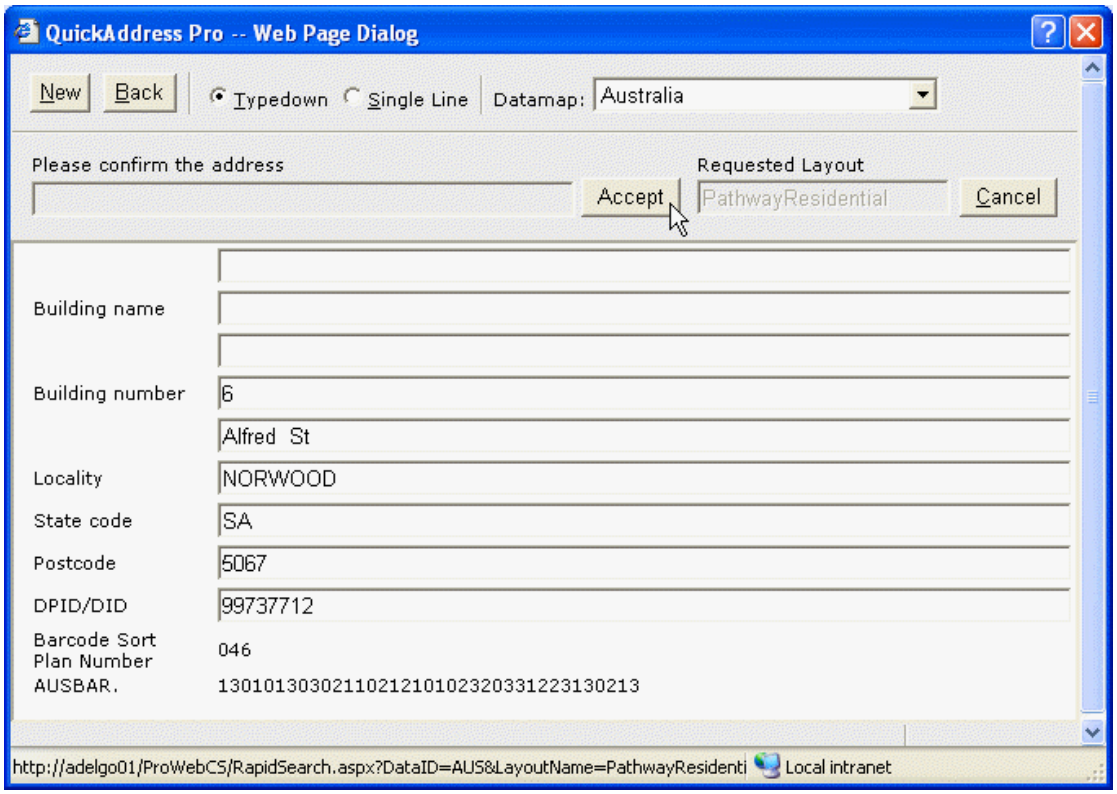


Fig 23: QuickAddress user interface – Typedown mode – address confirmation

Pressing the Accept button will cause the selected address to be returned to Pathway and displayed in the Address Maintenance form.

QAS-AUS DPID Refresh

A DPID data batch update process has been provided via the *Name and Address Register* ► *Name and Address System Housekeeping* ► *QAS-AUS DPID Refresh* menu option.

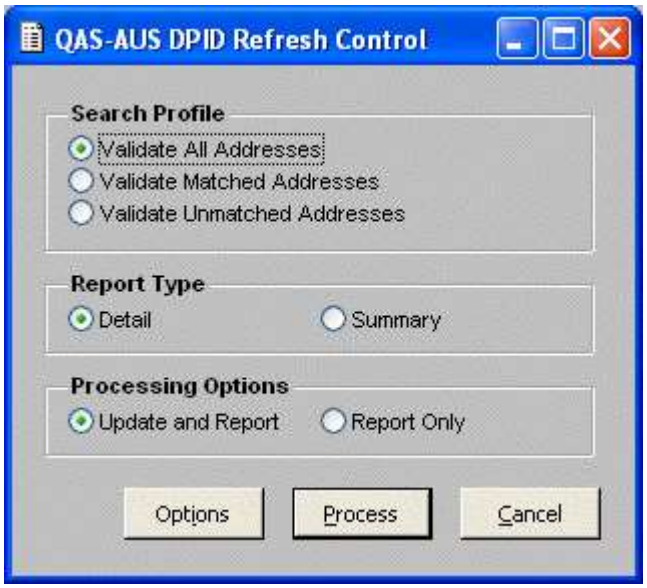


Fig 24: QAS-AUS DPID Refresh Control

The control form allows the submission of a batch job to validate all addresses, matched addresses or unmatched addresses. The batch process may be run in report-only mode, or update-and-report mode. The report may be produced either in summary or detail format.

The control form may also be accessed via the *System Administration* ► *Integration* ► *DPID Parameters* ► *QAS-AUS DPID Refresh* menu option.

QuickAddress Web Server

The files for the QuickAddress web server (customized for use with Pathway) are included on the Pathway release media, and are available in the *.\msc\QuickAddress* folder once the Release has been installed. This folder contains a folder named PathwayQas, which should be copied to the IIS web server folder structure on the server on which QuickAddress Pro Web is installed, for example: *C:\Inetpub\wwwroot\PathwayQas* . It will then be necessary to configure IIS to serve web pages from this location.

Infor currently intends to provide an installer to automate this process; in the meantime, please contact Infor Public Sector support for instructions.

Note that the QuickAddress Pro Web installer will install its own default web server pages in *C:\Inetpub\wwwroot\ProWebCS* if the installation option is specified when QuickAddress Pro Web is installed. These default pages are not customized for Pathway, and will not work with Pathway.

QAS-NZL Parameter Maintenance

Pathway now supports validation of New Zealand addresses via the QuickAddress Pro Web third-party DPID validation product. A separate Authorised Function has been provided to facilitate this. Customers wishing to validate addresses using the QuickAddress NZL DataSet as the base DataSet will need the new Authorised Function (and the NZL DataSet PAF file from QuickAddress). Customers wishing to validate addresses using the QuickAddress AUS DataSet as the base DataSet will need the existing Authorised Function (and the AUS DataSet PAF file from QuickAddress).

Because an alternative DataSet (NZG) is available for New Zealand addresses, it is now possible to specify an overriding DataSet for each template. The base DataSet is determined by the DPID product selected in the Integration System Parameters – QuickAddress Pro Web (AUS) or QuickAddress Pro Web (NZL) – and will be used for searching unless an overriding DataSet Id is specified for the Template.

Note that the overriding DataSet Id can be for any QuickAddress DataSet that is installed, so an Australian site that has the Authorised Function code for the Australian version could set up a Template for New Zealand addresses validated against the NZL DataSet without the need for the Authorised Function code for the New Zealand version: all that is needed is the NZL DataSet from Quick Address.

QAS-NZL Parameter Maintenance

Parameters for QAS-NZL are maintained on the QAS-NZL Parameter Maintenance form (accessed via the *System Administration* ► *Integration* ► *DPID Parameters* ► *DPID Product Parameters* menu option):-

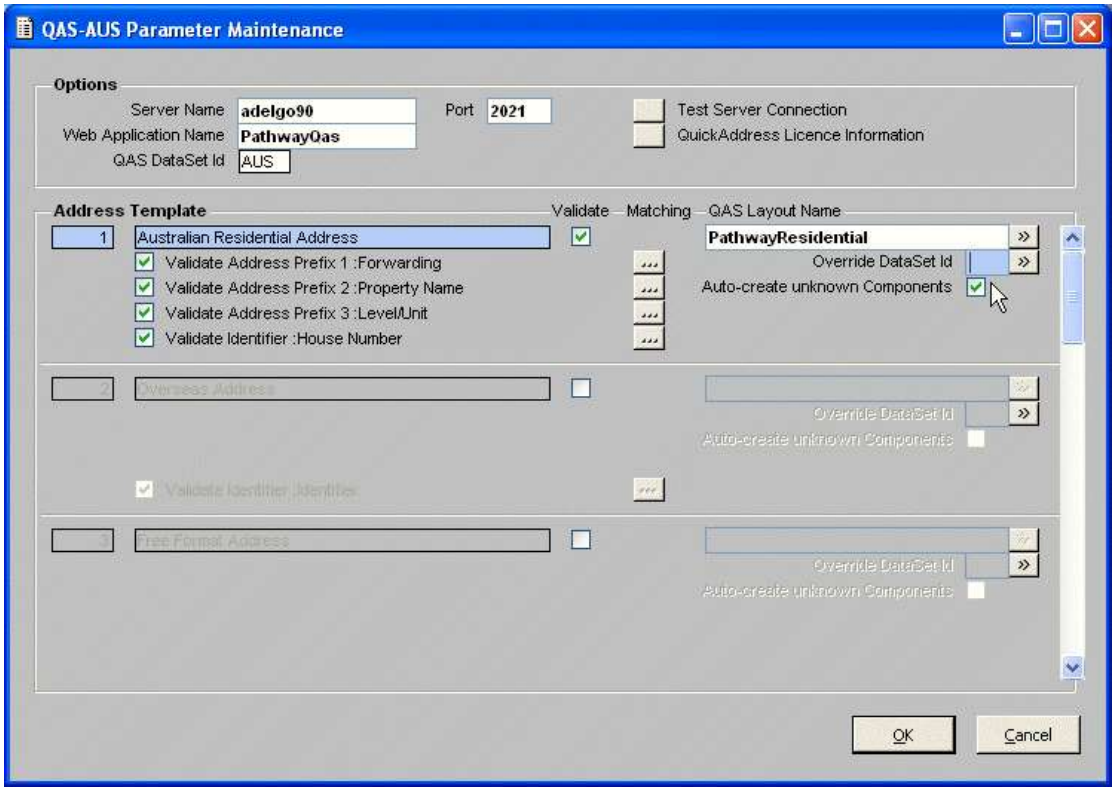


Figure 1: QAS-AUS Parameter Maintenance

Note: The QAS-AUS Parameter Maintenance form and QAS-NZL Parameter Maintenance form are identical in appearance and functionality. The notes below apply to both forms.

Two new fields have been added to each address template occurrence, an editbox with associated pop-up button, Override DataSet Id, and a checkbox, Auto-create unknown Components, as shown in Figure 1 above.

The Override DataSet Id editbox allows the user to override the default data set for the template (shown in the QAS DataSet Id field in the Options Area frame – 'AUS' in the above example) with an alternative dataset. A list of available DataSets will be retrieved from the QuickAddress server: any overriding DataSet Id entered will be checked against this list, and unknown DataSets will be disallowed.

The Override DataSet Id pop-up button may be used to call the QuickAddress DataSet Pop-Up form to allow the desired DataSet to be selected:-

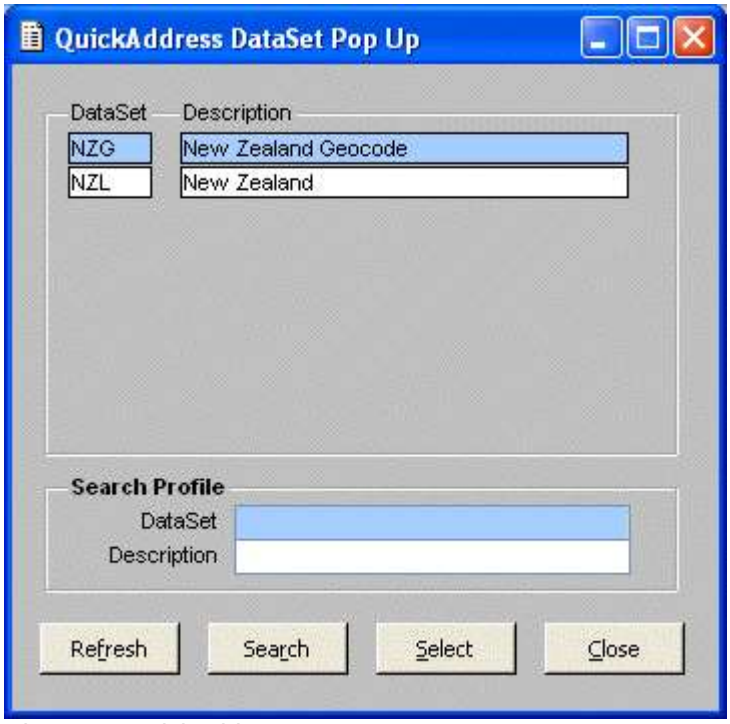


Figure 2: QuickAddress DataSet Pop-Up

The form retrieves the list of installed DataSets from the QuickAddress server. The currently-selected DataSet from the QAS-NZL Parameter Maintenance form will be highlighted.

The Select button may be used to return the selected DataSet to the QAS-NZL Parameter Maintenance form.

The Search button may be used in conjunction with the Search Profile fields to display a subset of the DataSets returned by the QuickAddress server.

The Refresh button may be used to re-retrieve the list of valid DataSets from the QuickAddress server.

The Auto-create unknown Components checkbox specifies whether unknown (to Pathway) Address Components can be created automatically (with a single double-click action) when the address returned from QAS is added.

The QuickAddress Licence Information detail button in the Options area frame of the QAS-NZL Parameter Maintenance form now displays the licence information for *all* installed QuickAddress DataSets:-

Figure 3: QuickAddress Licence Information

Changes to the interface in the Smart Client

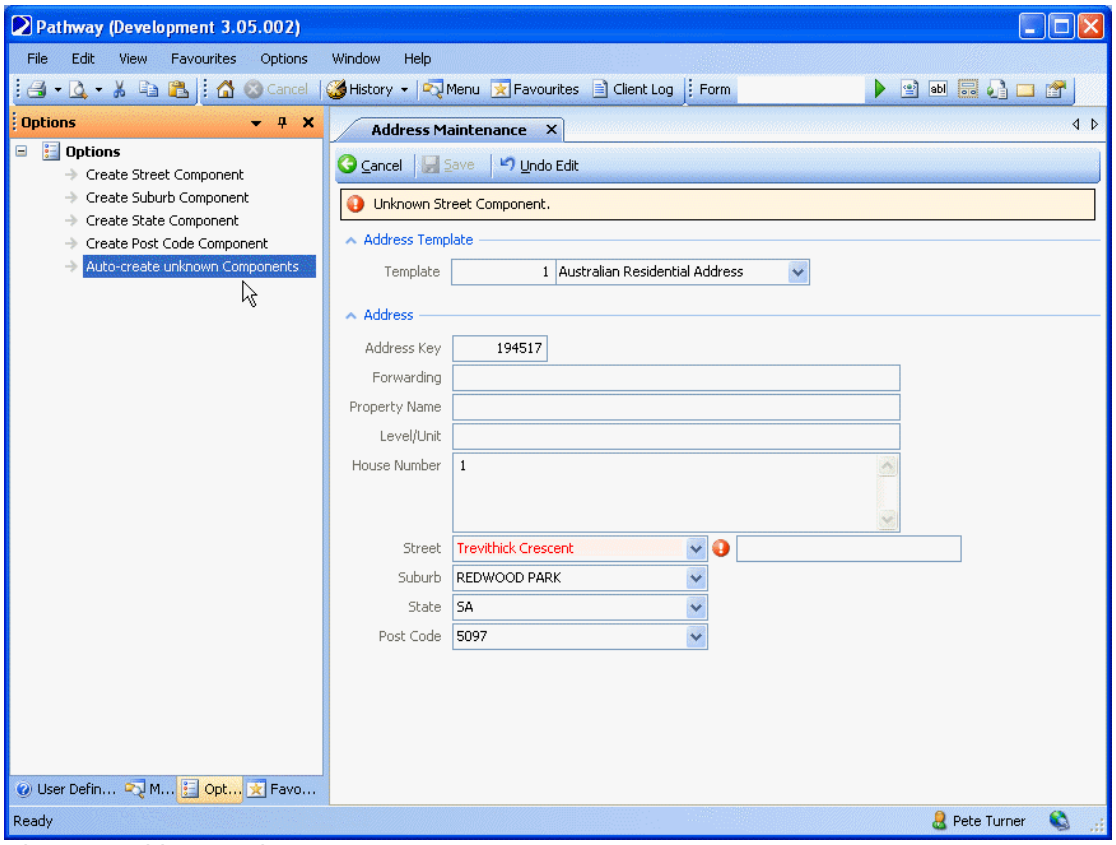


Figure 4 Address Maintenance

When the address selected in QuickAddress is returned to Pathway, Pathway attempts to match each element (Street, Suburb, State and Post Code) to an existing address component within Pathway. If the component is successfully matched, it will be displayed in the appropriate field on the Address Maintenance form. If a component is not matched, it will be highlighted as an unknown component. Either the individual Create Component option or the new Auto-create unknown Components option

(which will automatically create all the unknown components with no further user interaction) may be used to create the component. In either case, there is now no need to rekey the missing component.

Wellington Interface

Wellington Interface

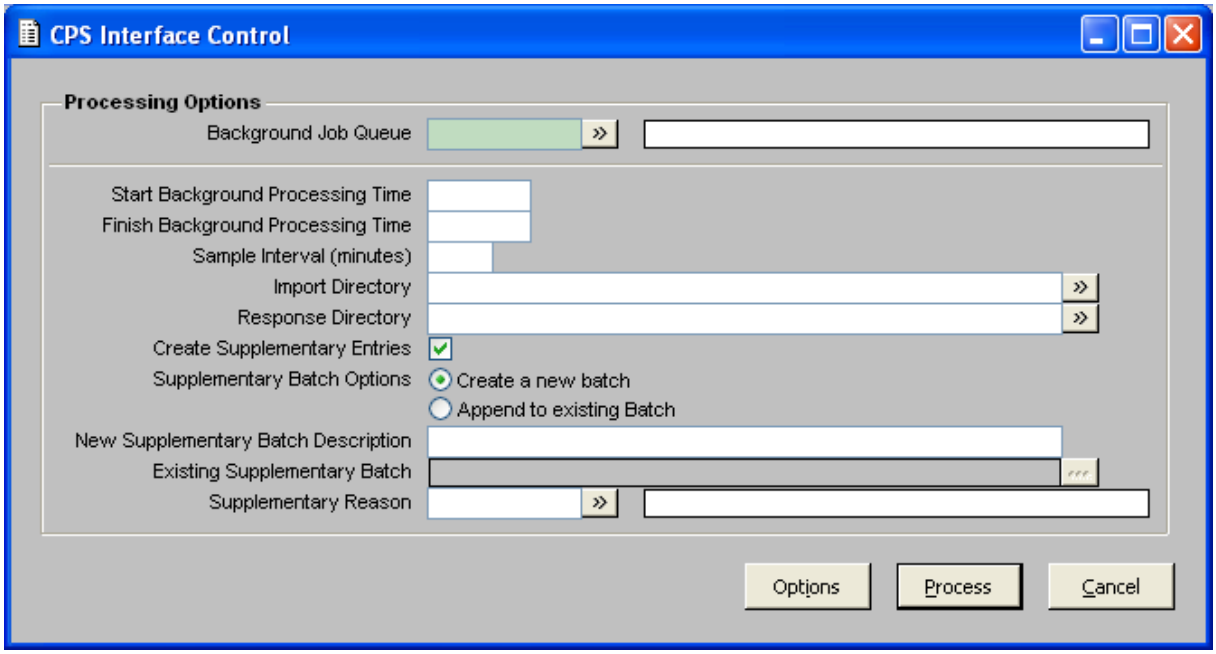
The Wellington Interface is the means that enables Wellington City Council to transfer Property, Customer and Valuation data from their Core Property System (CPS) to Pathway. Wellington City Council does not use Pathway Property or NAR to maintain Property and Names information. The structure and format (XML) of the Interface files has been predetermined with Wellington City Council.

CPS Interface Control Form

This form controls the Background Job Queue and the hours of operation of processing of the Interface files. It also controls if a Supplementary entry is to be created for an assessment where there is a change in Valuation in the current period detected.

Once a job is submitted to the selected job queue, it generates a new job based on the Sample Interval (minutes) entered. It looks for the presence of files in the Import Directory and when processed deletes the file. Files are processed in file number order. Upon completion of processing a Response File is written out with a status of either OK or ERROR. The response files are written to the Response Directory and need to be reviewed by Wellington City staff. Any reported errors need to be corrected and the file re-processed.

Each files processed contains **one** assessment/property combination and has all of the CPS details for that assessment. Only certain parts of the file are selected and updated by Pathway.



CPS Interface Control Form

Background Job Queue

Enter or select from the Pop Up the Background Job Queue that will be used for processing Wellington Interface files. This queue should not be used for any other purpose.

Start Background Processing Time

Enter the time for the first job to be processed on the selected Background Job Queue.

Finish Background Processing Time

Enter the time for the last job to be processed on the selected Background Job Queue. After this time new jobs will not be regenerated to the specified Background Job Queue.

Sample Interval (minutes)
Enter the number of minutes between jobs to be submitted to the Background Job Queue. This interval determines how often jobs are regenerated to the specified Background Job Queue.

Import Directory
Enter or select from the Pop Up the path of the folder where the Interface files will be written to. Only files in this folder will be processed. Files are processed in file number order.

Response Directory
Enter or select from the Pop Up the path of the folder where the Response files will be written to. It is the responsibility of the users to review the files in this folder and move or save them to an appropriate place.

Create Supplementary Entries
This field controls if a Supplementary entry will be created for an assessment when process the CPS Interface files. It also controls the availability of additional Supplementary fields on the form.

- If this is set OFF:
  All the new Supplementary Rates fields below it will be unavailable (dimmed) and no Supplementary Entries will be created.
- If this is set ON:
  The 'Supplementary Batch Options' field will be defaulted to 'Create a new Batch' and the Supplementary Rates fields appropriate to this setting will be available (see fields below). Supplementary Entries will be created where the imported data meets specific criteria.

Supplementary Batch Options
This field is only available when the 'Create Supplementary Entries" is set ON. The available options are:

- Create a new Batch (this is the default value)
- Append to an Existing Batch

New Supplementary Batch Description
This field is mandatory when available. It is only available when "Create Supplementary Entries" is set ON and "Supplementary Batch Options" is set to 'Create a new Batch'. Enter the description to be assigned to the new Supplementary Batch that will be created for the current System Date.
NOTE: If a Supplementary Batch already exists for the current system date, an error will be issued stating that a new batch cannot be created and Supplementary entries must be appended to an existing batch.

Existing Supplementary Batch
This field is mandatory when available. It is only available when "Create Supplementary Entries" is set ON and "Supplementary Batch Options" is set to 'Append to existing Batch'. Enter or select from the pop up an existing Supplementary Batch with status of 'Open'.

Supplementary Reason
This field is mandatory when available. It is only available when "Create Supplementary Entries" is set ON. Enter or select from the pop up the Reason for the Supplementary Batch. All Supplementary entries created will then have this Reason.

APPENDIX A

POSTman Rapid

POSTman Rapid in the Name and Address Module

Modifications have been made to the Name and Address Module (CNA) to accommodate the use of POSTman Rapid to find valid addresses and paste them into the Name and Address Register.

These instructions do not detail the setting-up/configuration of the POSTman Rapid product itself; detailed documentation accompanies the actual product for that purpose.

IMPORTANT - Updated Version of POSTman Rapid

Direct Marketing Services have made modifications to the POSTman Rapid product so that Paste Action files and Address Types cannot be changed by a user when a search using POSTman Rapid has been instigated from Pathway Address Maintenance. Direct Marketing Services have advised that these modifications will be included in 'the 2010.1 PAF CDs'.

This updated version of POSTman Rapid MUST BE INSTALLED to implement the interface to Pathway Address Maintenance correctly.

Creating POSTman Rapid Paste Action Files

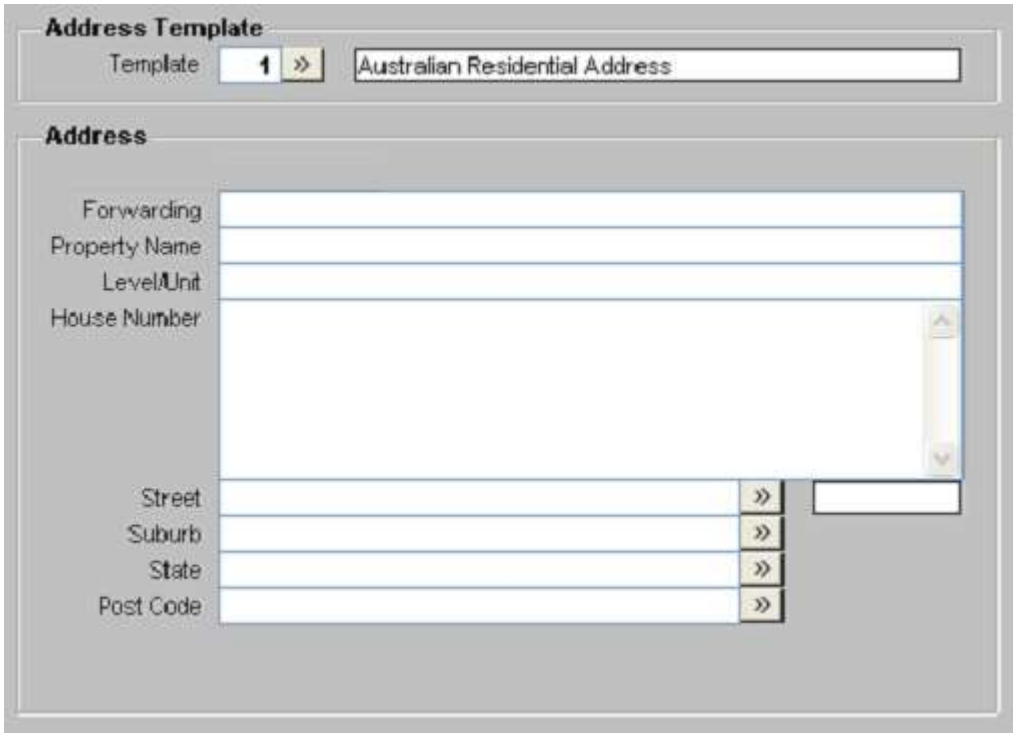
The following instructions should be read in conjunction with the POSTman Rapid documentation pertaining to Paste Action files.

To enable POSTman Rapid to format and return address details, a Paste Action file must be specified for each CNA Address Format to be used.

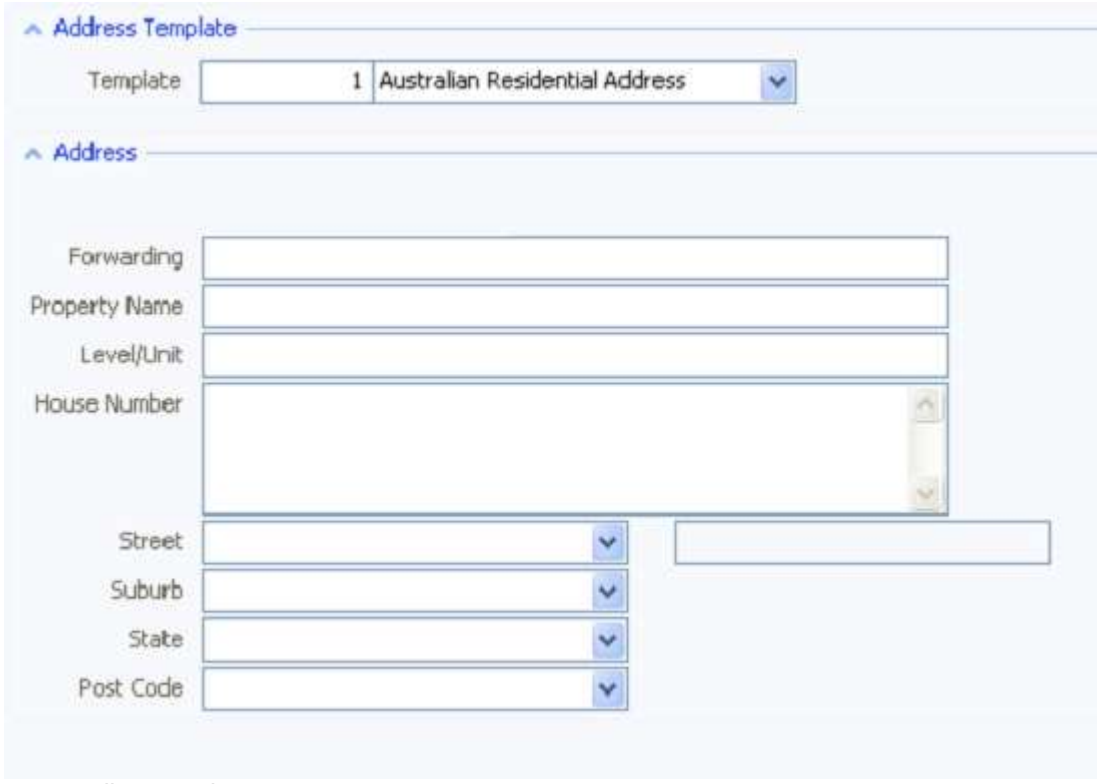
As a preliminary step for the Smart Client, an overriding window title for the user interface MUST be set in the Pathway.Deploy file for the Pathway environment in which POSTman Rapid will be used. This setting is required so that POSTman Rapid can locate the form to which it will paste its data. Furthermore, if a site has some employees who access Pathway via the Smart Client and other employees who access Pathway via the Thick Client simultaneously, the overriding window title setting in Pathway.Deploy must correspond with the setting of 'TitleUNIFACE' in the SetL.asn file for the Thick Client.

a) Paste Action file – formatted address

The following are Thick Client and Smart Client examples of a Pathway Address Template for a formatted address as it is applied in the Address Maintenance form:

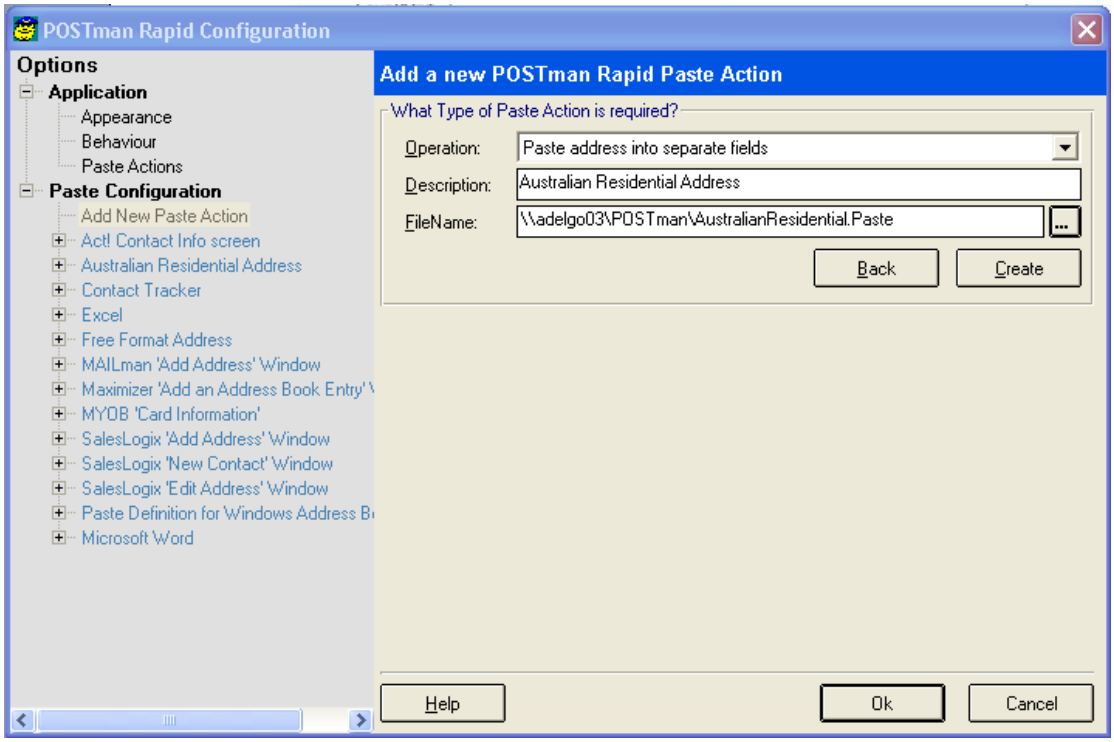


Thick Client Version

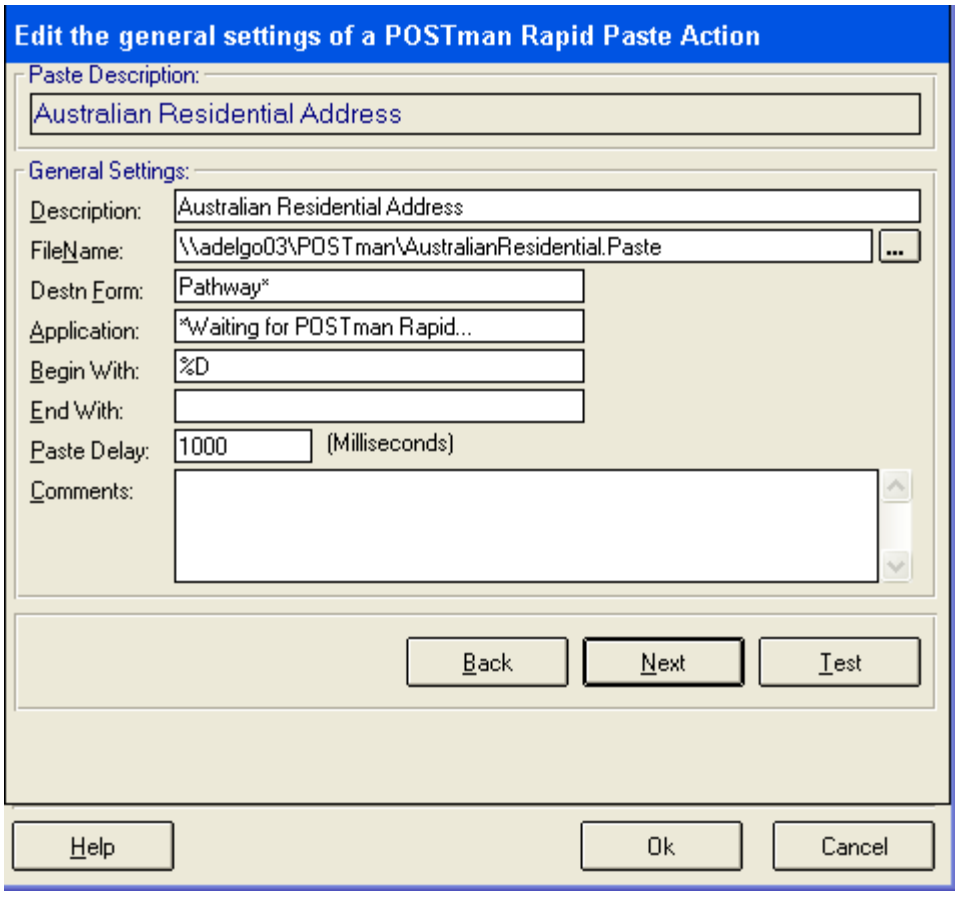


Smart Client version

The Paste Action file is created by accessing the Paste Configuration option in POSTman Rapid and invoking the Add New Paste Action option:



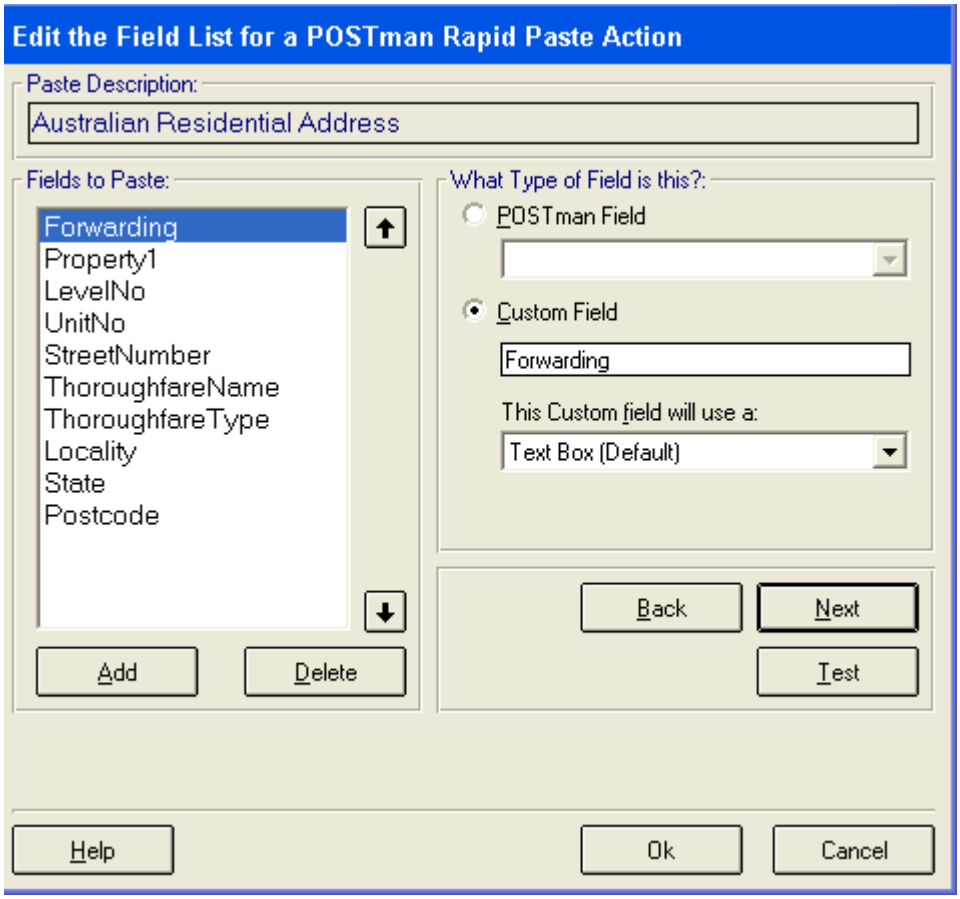
The Operation must be set to ‘Paste address into separate fields’. An appropriate Description and FileName must be entered. When the Create button is invoked, the general settings form is presented as follows:



The requirements for the fields on this form are as follows:

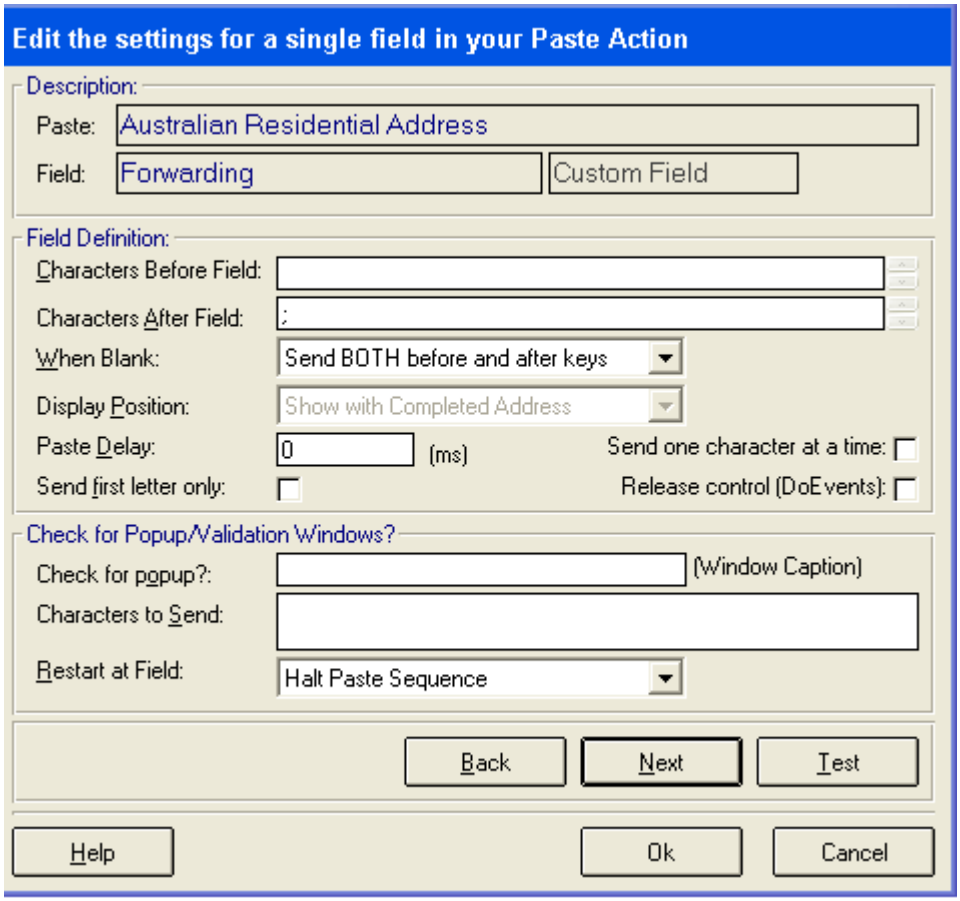
1) Description: Can be edited if required;
2) FileName: Can be edited if required;
3) Destn (Destination) Form: Must be set to a portion of the overriding window title (not the full title) with an asterisk appended - the example setting above assumes that the overriding window title has been set to 'Pathway Production';
4) Application: Must be set to '*Waiting for POSTman Rapid…';
5) Begin With: Must be set to '%D';
6) End With: Leave blank;
7) Paste Delay: This may need to be varied (Refer to POSTman Rapid documentation);
8) Comments: Any desired notes or comments can be entered.

When all entries on this form are complete, the Next button is invoked to assign actual data fields.



The Paste Action file must contain entries for each of the fields included in the Pathway Address Template. There may be no corresponding POSTman data fields for some Pathway fields but, where this so, a 'Custom Field' must be included; the Pathway field 'Forwarding' in the example is such a field. Other Pathway fields may require the assignment of multiple POSTman fields; the Pathway field 'Level/Unit' in the example is a composite field and so two POSTman fields (LevelNo and UnitNo) have been included. Also, the Pathway field 'Street' will be handled as a composite field and as such will require the assignment of two POSTman fields corresponding to its name and qualifier (or type).

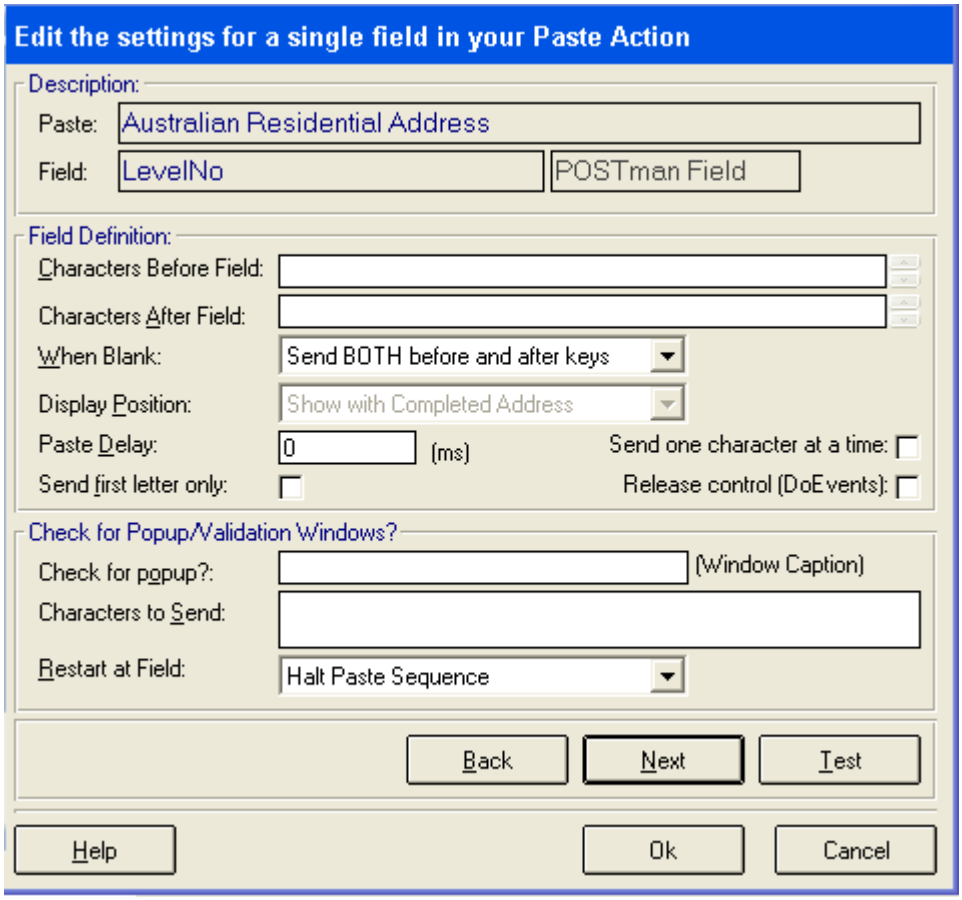
When all fields are assigned, the 'Next' button is invoked to access the settings required for each of the Paste Action fields:



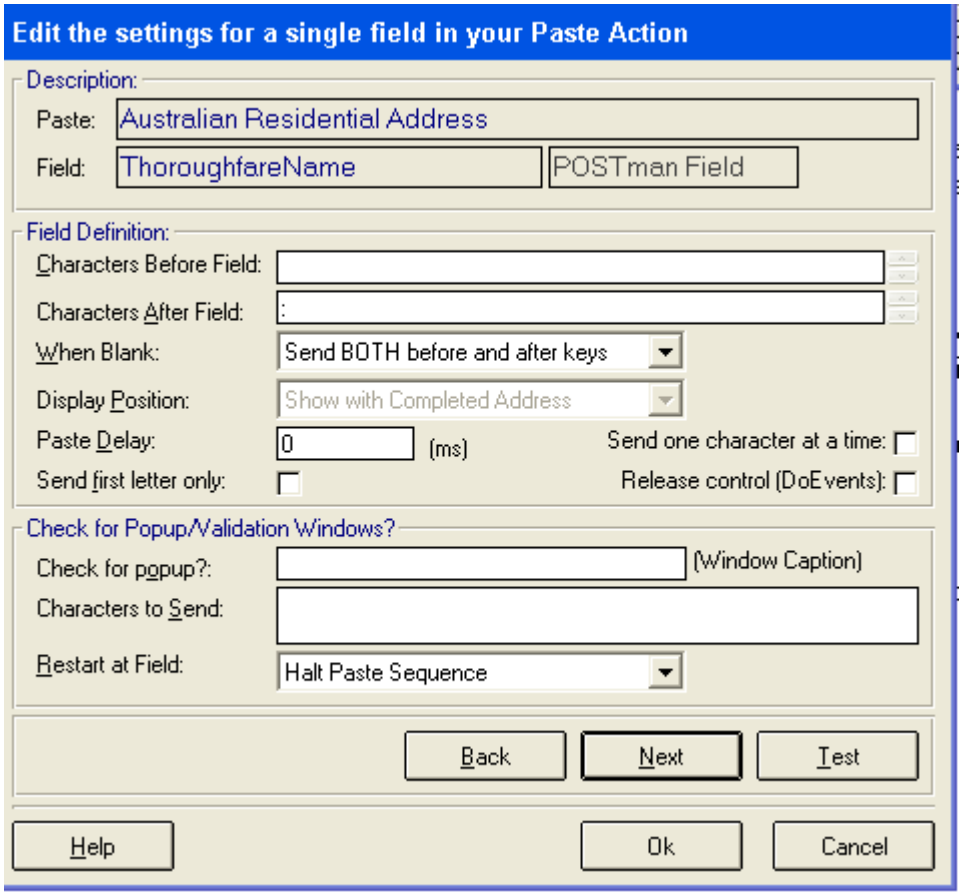
The requirements for the fields on this form are as follows:

1) Characters Before Field: Leave blank;
2) Characters After Field: MUST be set to ';' i.e. a semi-colon;
3) When Blank: MUST be set to 'Send BOTH before and after keys';
4) Send first letter only: MUST be set off;
5) All other fields: Ignore for our purposes.

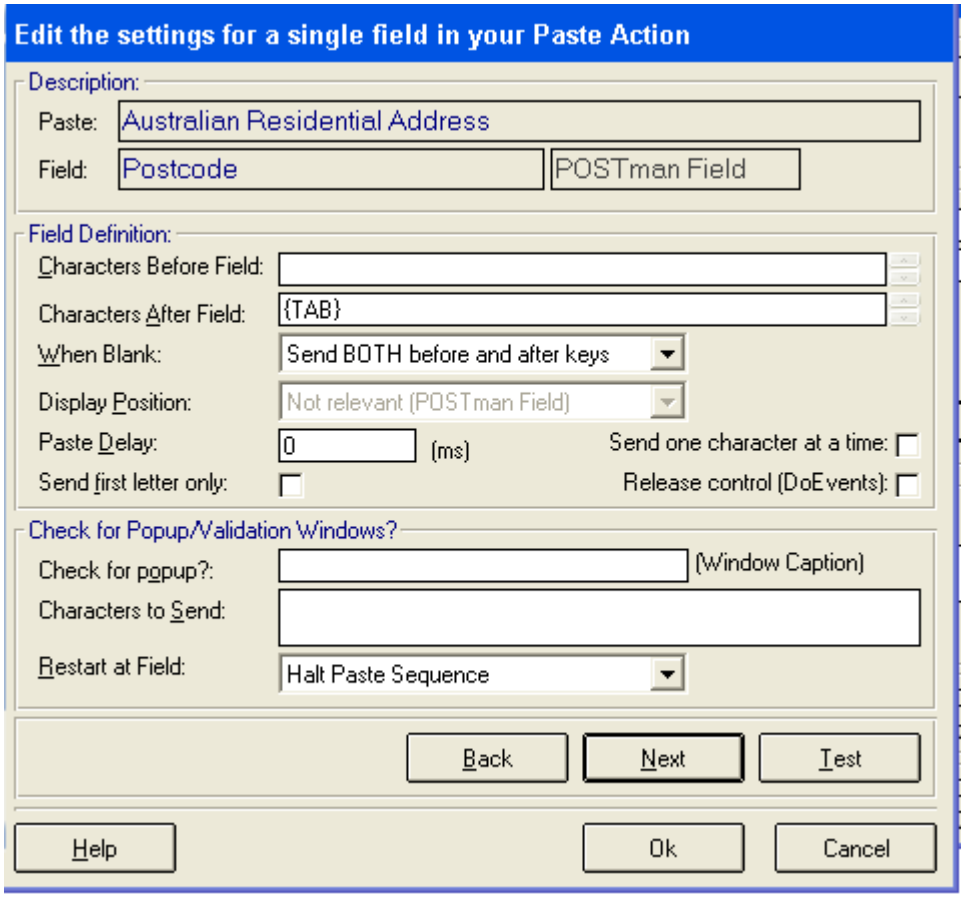
All these requirements will be the same for all fields except the first POSTman field assigned for a composite Pathway field (in the example, 'Level/Unit' and 'Street') and the last field assigned for the Paste Action (in the example, Postcode).



In the case of composite Pathway fields like ‘Level/Unit’ in the example, the ‘Characters After Field’ setting MUST be left blank. This will have the effect of pasting either the Level No OR the Unit No into the Pathway field.



The Pathway 'Street' field is handled as a special composite field and, as such, the 'Characters After Field' setting of the first assigned POSTman field (in the example, 'ThoroughFareName') MUST be set to a colon (i.e. ':'). This will enable the two components of the street name to be identified and pasted into the Pathway Address Template correctly.



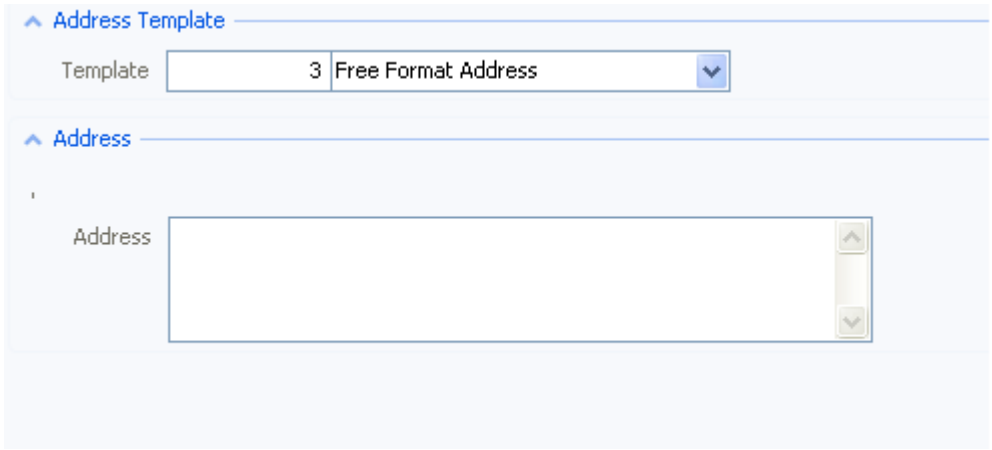
The 'Characters After Field' setting of the last field assigned to the Paste Action (in the example, 'Postcode') must be set to '{TAB}'.

After all fields have been assigned and their individual settings entered, the OK button is invoked to save the Paste Action file.

b) Paste Action File – free format address

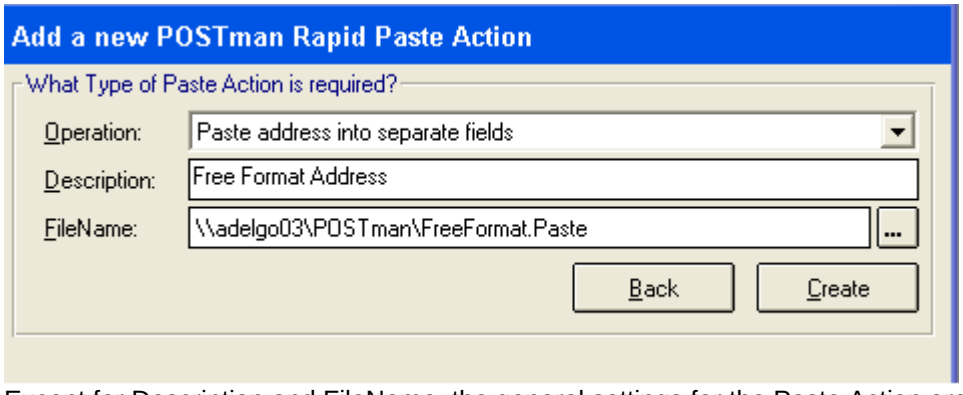
The following are Thick Client and Smart Client examples of a Pathway Address Template for a 'free format' address as it is applied in the Address Maintenance form:

Thick Client version

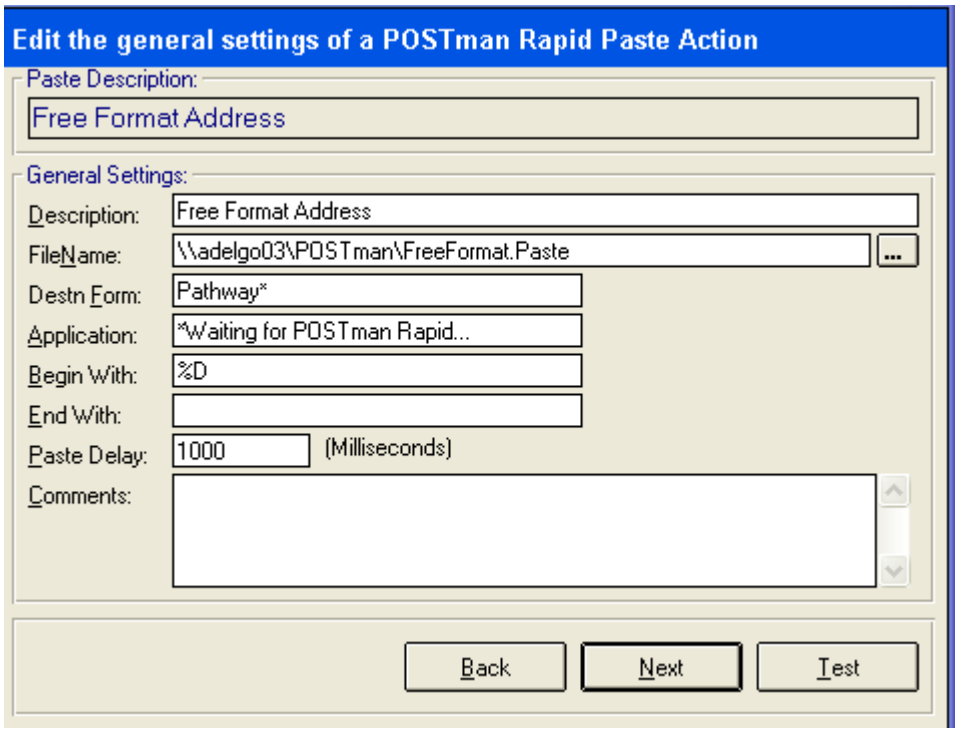


Smart Client version

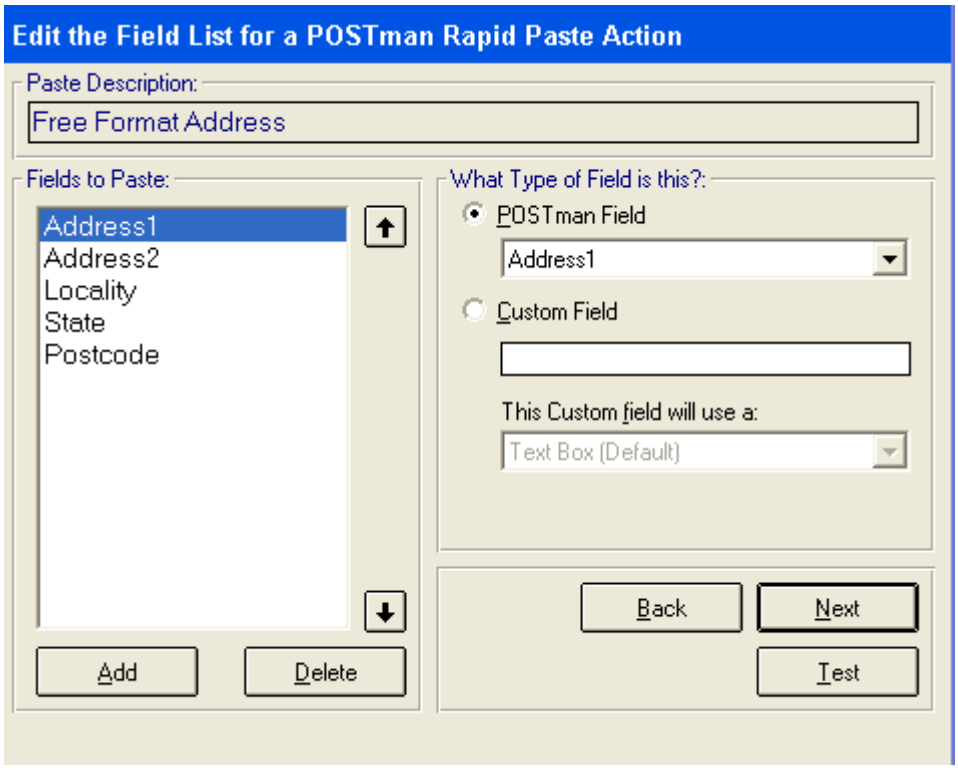
As was the case for a formatted address when specifying the type of Paste Action, the Operation must be set to 'Paste address into separate fields' and an appropriate Description and FileName must be entered.



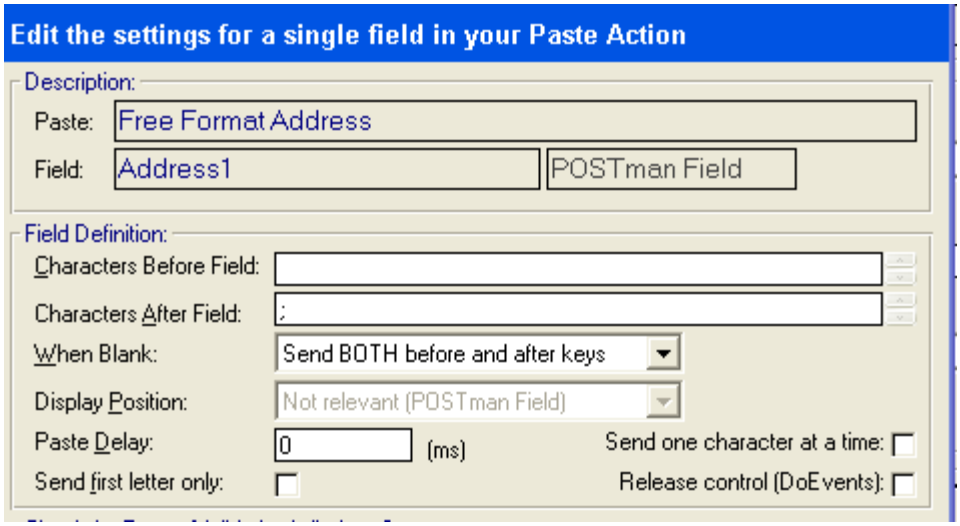
Except for Description and FileName, the general settings for the Paste Action are exactly the same as for a formatted address:



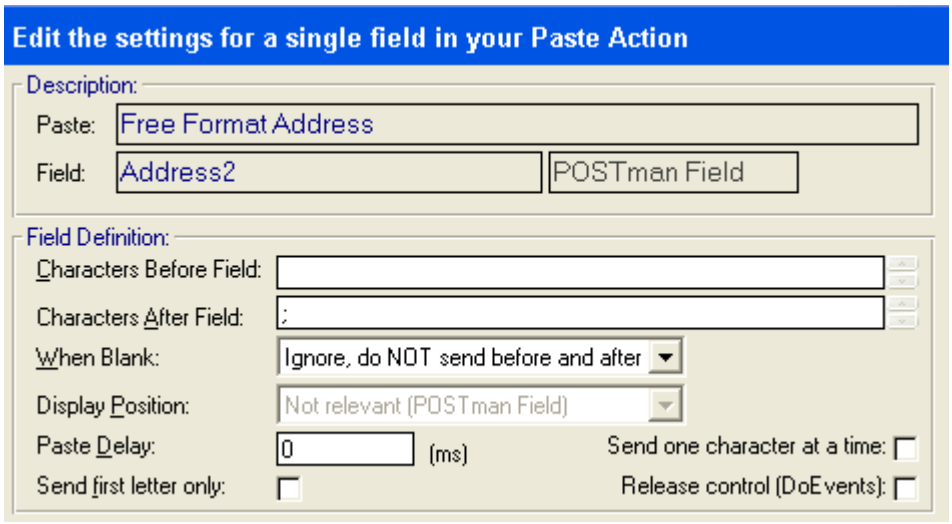
Fields are assigned to the Paste Action in the same manner as for a formatted address:



However, where the semi-colon character (;) was used to separate fields in the case of a formatted address, this same character must now be used to separate (or delineate) lines in a free format address. This character is to be entered as the 'Characters After Field' setting for the field after which a new line is to commence:



The 'When Blank' setting can be varied so that a new line is not commenced when a field returns no data:



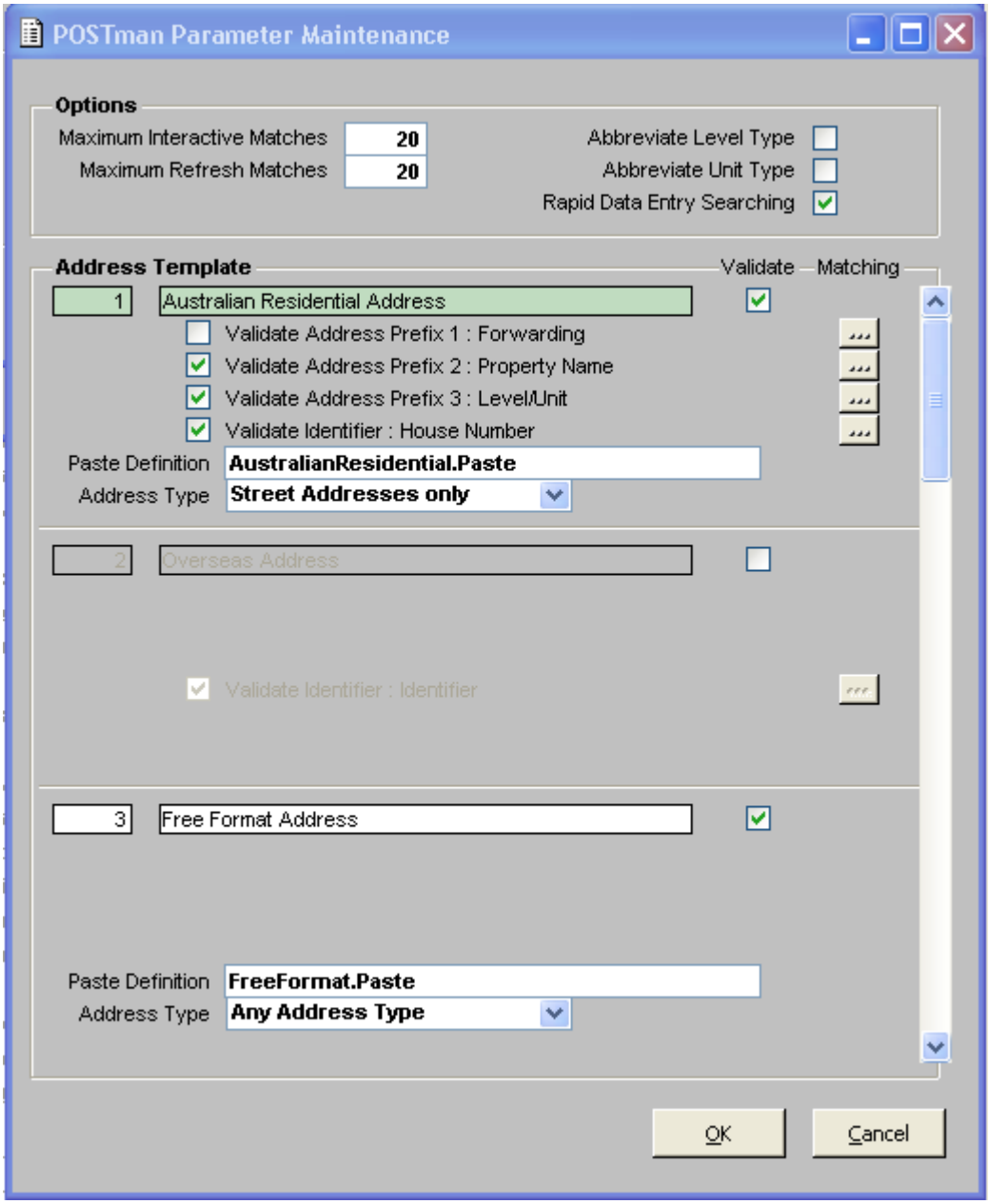
Where it is required to have multiple fields on the same line, one or more spaces should be entered as the 'Characters After Field' setting of all but the last field of the fields comprising the line. The setting for the last field will be either the semi-colon or, in the case of the last field of the address, '{TAB}'.

In the example, it is probably appropriate to have the fields Locality, State and Postcode appear in the address as a single line. Therefore, the 'Characters After Field' setting for Locality and State would one or more spaces and, as Postcode is the address' last field, its 'Characters After Field' setting would be '{TAB}'.

After all fields have been assigned and their individual settings entered, the OK button is invoked to save the Paste Action file.

Pathway POSTman Parameters

New fields have been added to the POSTman Parameter Maintenance form to control address searching and pasting using POSTman Rapid.



Firstly, the field ‘Rapid Data Entry Searching’ has been added under the Options section at the head of the form. Setting this field on enables address searching and pasting using POSTman Rapid from the Address Maintenance and POSTman Near Match Selection forms; if it is not set on, this facility is not available.

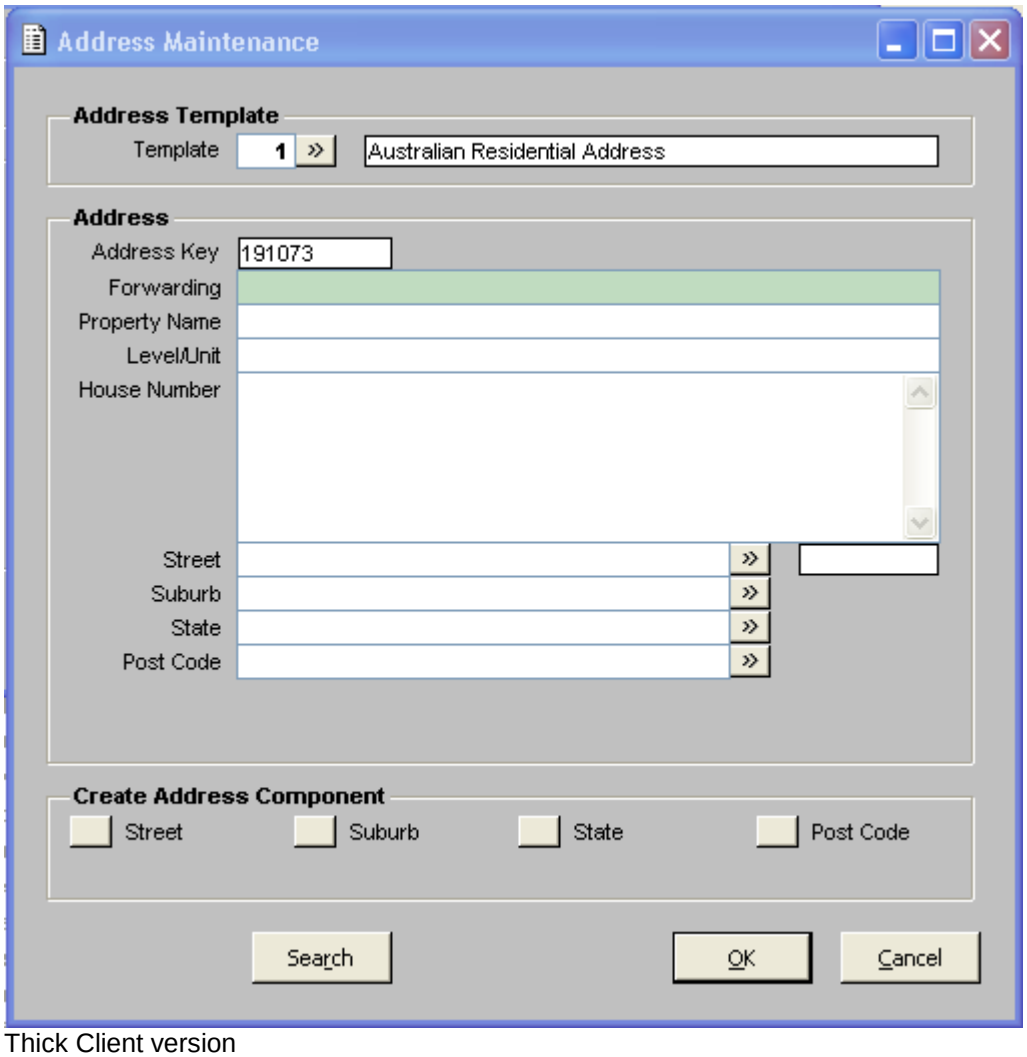
Secondly, the fields ‘Paste Definition’ and ‘Address Type’ have been added to the Address Template records. These fields are available for an individual Template record when both the ‘Rapid Data Entry Searching’ flag and the Template’s ‘Validate’ flag are set on. If the ‘Rapid Data Entry Searching’ flag is ON but the ‘Validate’ flag is OFF for a particular Template, address searching and pasting will NOT be available when entering an address using that Template.

The ‘Paste Definition’ field must contain the name of the Paste Action file created for the particular Template in POSTman Rapid. The entry MUST NOT contain the full path of the file; only the file name and the ‘.Paste’ extension are required. If this entry is left blank for a particular Template, address searching and pasting will NOT be available when entering an address using that Template.

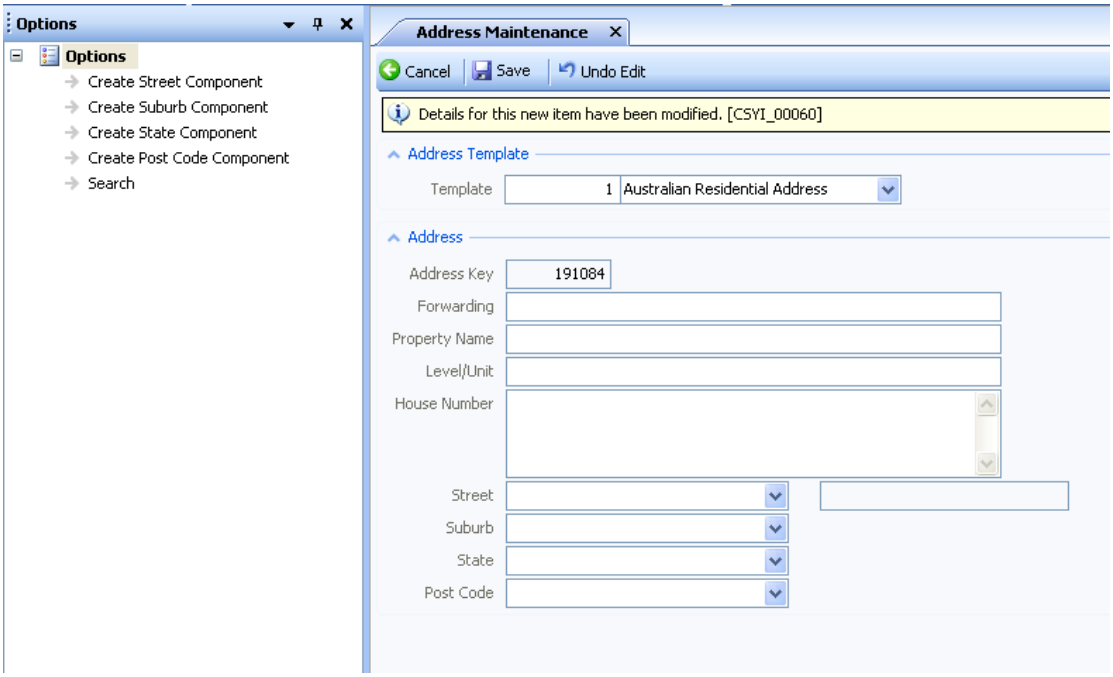
The ‘Address Type’ field is used to specify the type of address search that POSTman Rapid will undertake for an address being entered using the particular Template. The field can be set to ‘Any Address Type’, ‘PO Box Addresses Only’ or ‘Street Addresses Only’.

In summary, for address searching and pasting to be available for an individual Template, the ‘Rapid Data Entry Searching’ flag must be ON, the Template’s ‘Validate’ flag must be ON and the name of the Template’s Paste Action file must be entered in the Template’s ‘Paste Definition’ field.

Address Searching and Pasting When Adding New Addresses



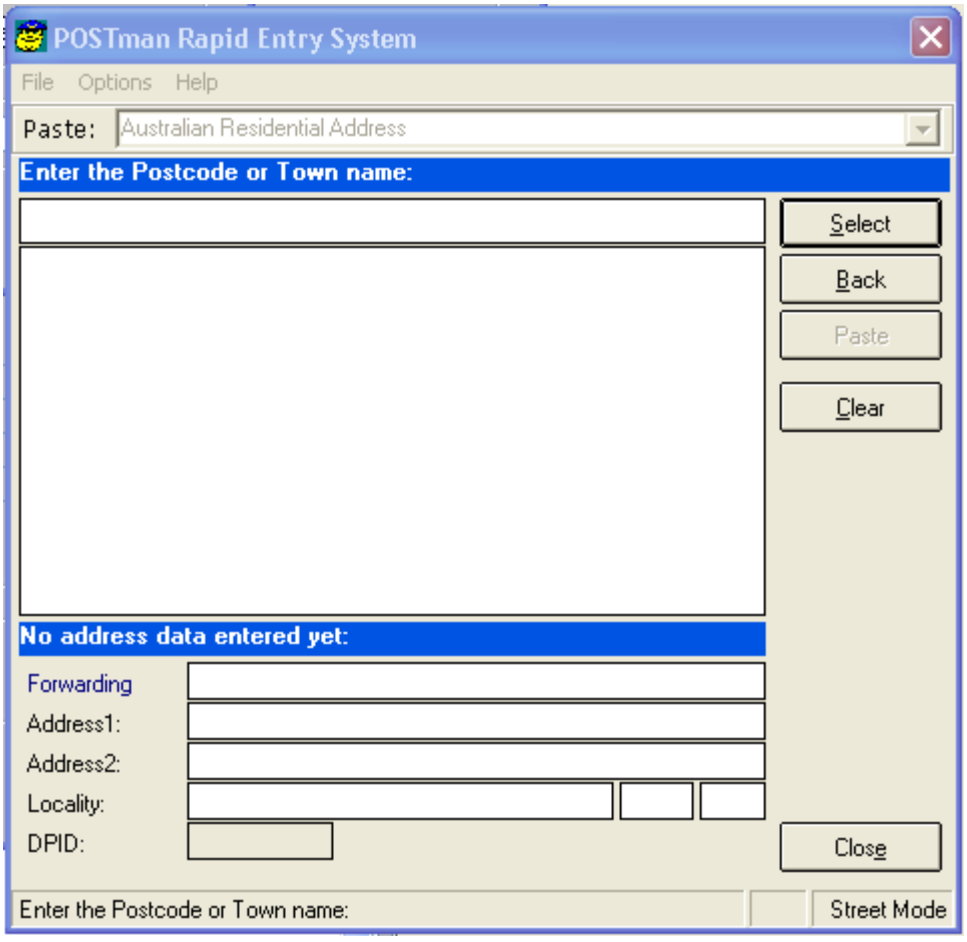
Thick Client version



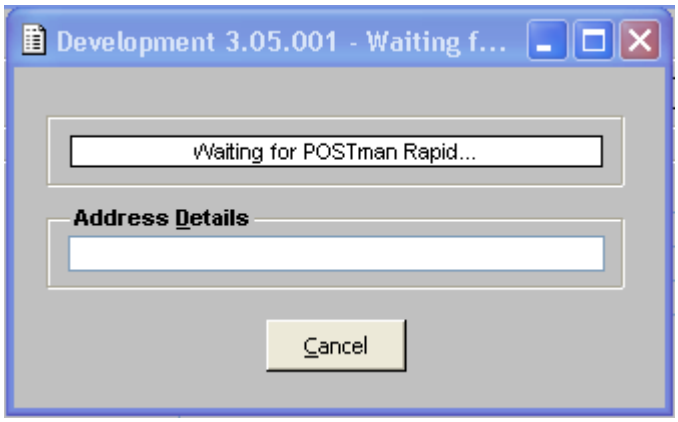
Smart Client version

When adding a new address, the Search button is available in the Thick Client and the Search option is available in the Smart Client for the selected Address Template when all the relevant parameters have been entered correctly (see the previous section – Pathway POSTman Parameters).

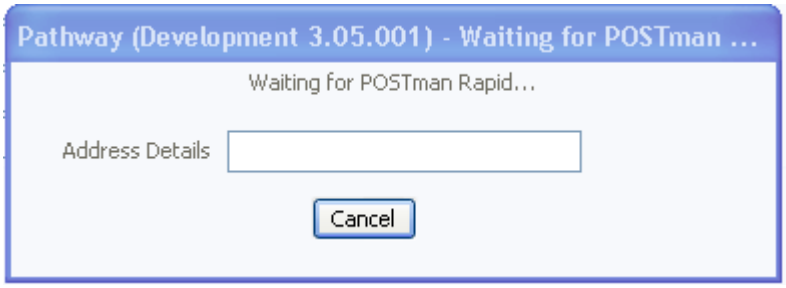
The button or option is invoked to display the POSTman Rapid Entry System form:



The components of the required address are entered/selected in accordance with the prompts provided by POSTman Rapid. When the entry/selection of all address components is complete, the Paste button is invoked to paste the address data back to Pathway.



Thick Client version

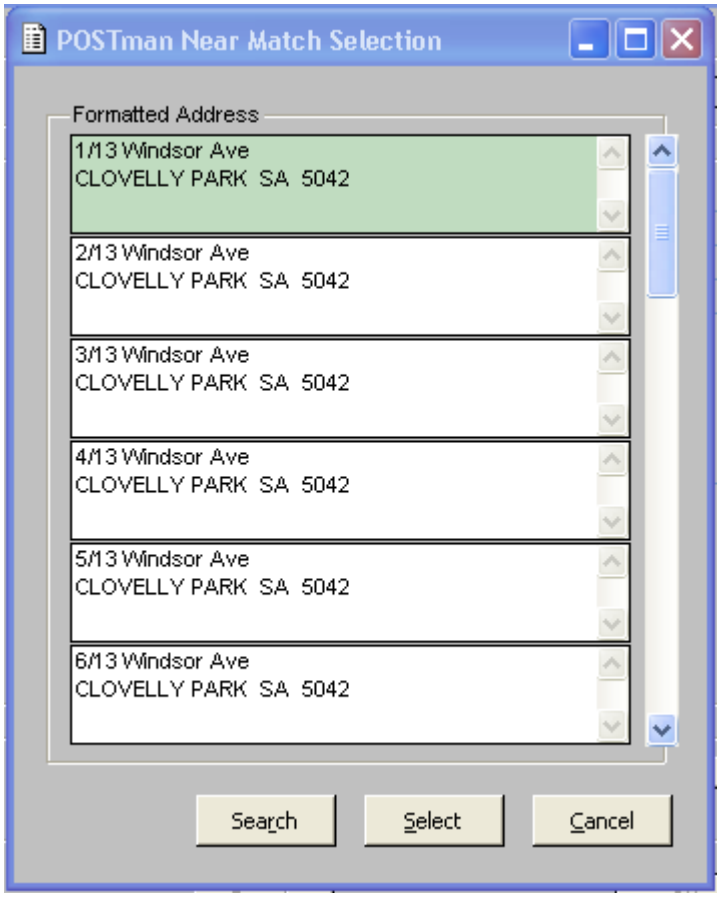


Smart Client version

In conjunction with the display of the POSTman Rapid Entry System form, the 'Waiting for POSTman Rapid…' form is presented. This form acts as the intermediary between the Pathway Address Maintenance form and the POSTman Rapid Entry System form. It is the actual Pathway form that receives the address data from POSTman Rapid and directs it through a conversion process so that the data can be pasted into the Address Maintenance form correctly.

Ordinarily, there should be no need for a user to interact with this form and in all likelihood it will be concealed behind the POSTman Rapid Entry System form. In the normal course of events, it will disappear when data is pasted into it. A user may need to interact with the form only when they invoke the Close button from the POSTman Rapid Entry System form. In such case the only interaction to be attempted should be to invoke the Cancel button; DO NOT attempt to enter data in the Address Details field.

After a full address has been entered/selected in POSTman Rapid and the Paste button invoked, the address data is converted and the Pathway database is checked for the presence of an existing address record corresponding to the entered/selected address. If such a record exists, it is retrieved and presented in the Address Maintenance form but, if no such record exists, a new address record is created and presented in the Address Maintenance form. Where the record is an existing one, the Search button (Thick Client) /option (Smart Client) is no longer available.



A Search button is also available on the POSTman Near Match Selection form (see above) for the selected Address Template when all the relevant parameters have been set correctly (see the previous section – Pathway POSTman Parameters). The form displayed above is from the Thick Client but a similar form is also available in the Smart Client.

The POSTman Near Match Selection form may be displayed when the user enters new address details into the Address Maintenance form and invokes the Save button. When the Save button is invoked, an attempt to validate the address in the POSTman Enterprise product is made and, if that attempt fails, a list of 'near match' addresses is presented to allow the user to select an alternative address if they so wish.

Alternatively, the user may choose to invoke the Search button. This button invokes exactly the same course of action as the Thick Client's Search button and the Smart Client's Search option on the Address Maintenance form i.e. the POSTman Rapid Entry System form is presented to allow the entry/selection of a valid address.