System User Guide

Feedback
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Pathway 3.09 (Thick Client Version)

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SYSTEM USER GUIDE

System Parameters

The following topics are covered in this section:

User Defined Help

User Defined Help allows you to define help text for a particular form. The User Defined Help function can also incorporate the Memo function allowing Word documents etc to be incorporated into the User Defined Help. Additionally an URL path can be nominated. This could be particularly helpful if you define Procedures and wish to have these available as online User Help.

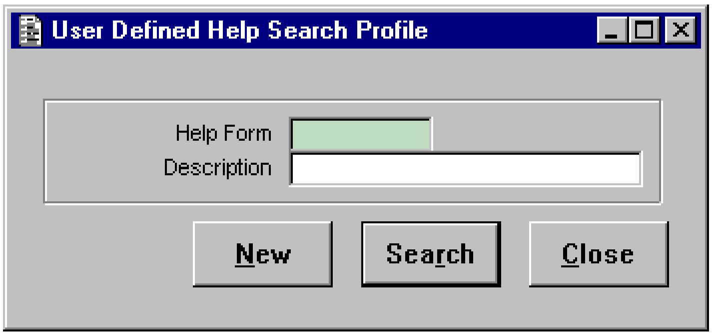
The User Defined Help is associated to a form and not to individual fields within a form. A message will be displayed in the Message frame informing the user that User Defined Help exists for the form. To display the User Defined Help select the Help option and then User Defined or use ALT SHIFT F1 to display the text.

Form names can be found by using Help and selecting About Form or by using CONTROL SHIFT F1 while displaying the form you wish to define User Help for.

User Defined Help Search Profile Form

The User Defined Help Search Profile form allows you to create new Help Text for a form or select existing Help Text that has been defined for a form.

Select the New Button to create Help Text for a new form. To select existing Help Text either leave the fields blank and select the Search button to show all forms which have User Defined Help or enter in the Help Form and or Description to limit the search to a required selection.



1- User Defined Help Search Profile

Help Form
Enter a Form Name on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

This field can be left blank.

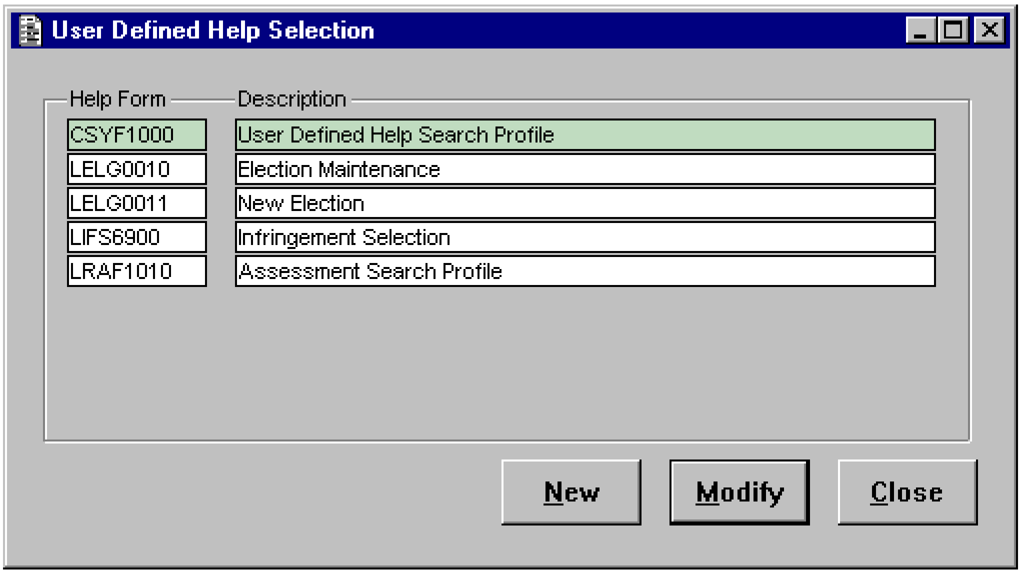
Description
Enter the Description of the form on which to base your search and use the Search button to initiate the search. Wildcard searching is available on this field.

This field can be left blank.

User Defined Help Selection Form

The User Defined Help Selection form is displayed when the Search button has been selected on the User Defined Help Search Profile form.

This form displays the forms which have User Defined Help associated to them. Select the form you wish to modify or select the New button to create Help for a new form.



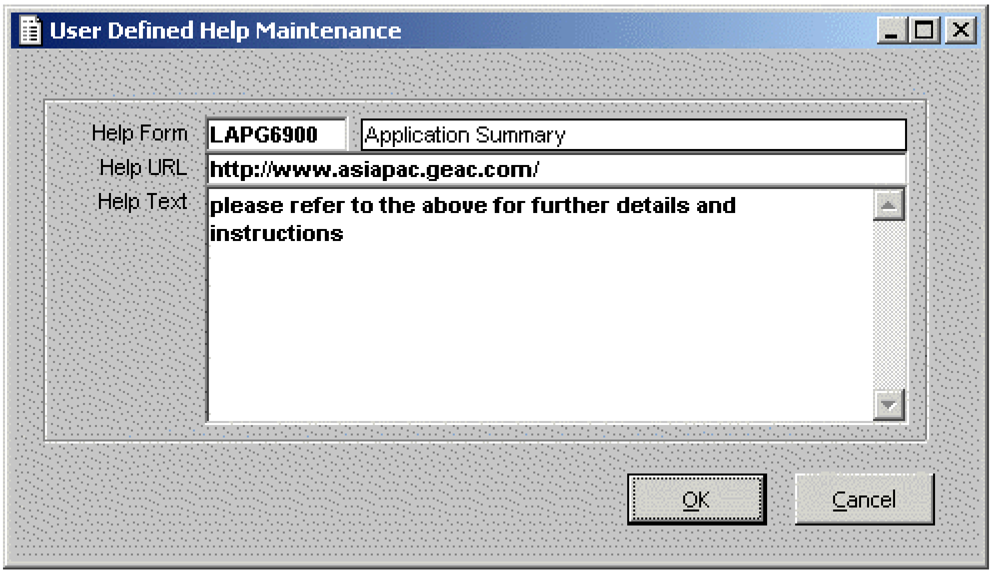
User Defined Help Selection Form

Help Form
Forms which have had User Defined Help associated to them are listed on this form for selection.

Description
The Description of the Form that has had User Defined Help associate to it is displayed in this field.

User Defined Help Maintenance Form

The User Defined Help Maintenance form shows the Form Name, Description and User Defined Help Text. The Memo function is available for use within your Help Text while in maintenance display.



User Defined Help Maintenance Form

Help Form
The Help Form is shown or entered in this field. This is the Form name found by using Help and selecting About Form or by using CONTROL SHIFT F1 while displaying the form you wish to define User Help for. The description of the Form is shown in the field next to the Help Form.

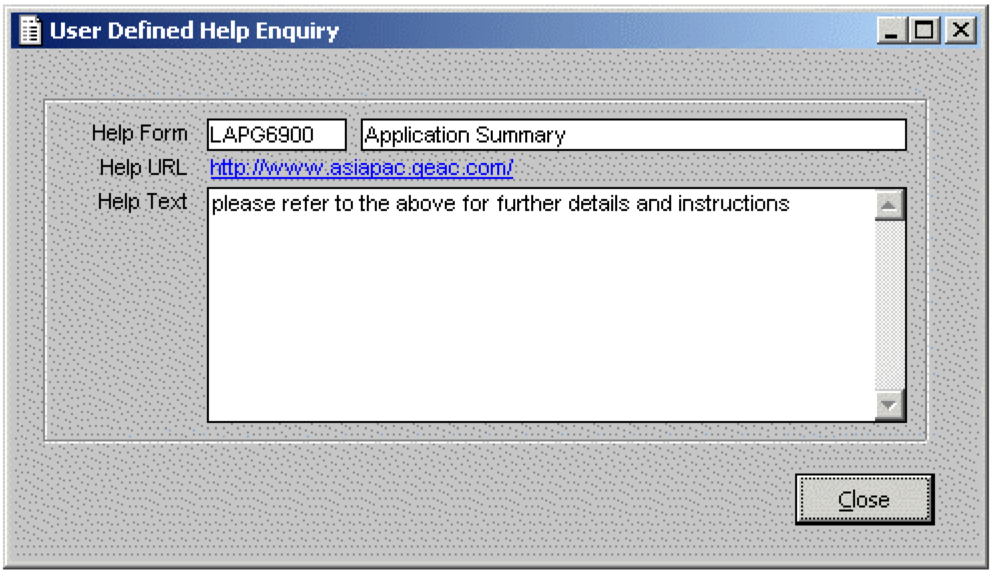
Help URL

If the User Help is to be accessed via the Intranet then the URL path can be entered into this field. This then enables the User to Click on the Path and open up the required information.

Help Text
In Maintenance display enter in the User Help Text that is to be displayed for the form nominated. Text will wrap around automatically while typing. By double clicking in this field the zoom function activates. This will show the User Defined Text already entered (if any) and allow entry of information. Auto wrap will automatically occur while typing.

User Defined Help Enquiry Form

The User Defined Help Enquiry form shows the Form Name, Description and User Defined Help Text. The Memo function is available for use within your Help Text while in maintenance display. Additionally if a URL path has been defined then the User is able to click on the path to display the required information.



User Defined Help Enquiry Form

Help Form
The Help Form is shown in this field. This is the Form name found by using Help and selecting About Form or by using CONTROL SHIFT F1 while displaying the form you wish to define User Help for. The description of the Form is shown in the field next to the Help Form.

Help URL
If the User Help is to be accessed via the Intranet then the URL path is displayed in this field. This then enables the User to Click on the Path and open up the required information.

Help Text
In Enquiry display the User Help Text that is to be displayed for the form nominated is shown. Text will wrap around. By double clicking in this field the zoom function activates. This will show the User Defined Text already entered.

Creating User Defined Fields

Within the system there is the ability to create fields as required where no appropriate field exists to cater for the data.

The ability to create these fields is restricted to those users with the appropriate security level.

Note: Caution should be exercised when creating User Defined Fields. These fields and any associated data are not available in any forms or standard reports generated by the system.

Note: User Defined Fields are created against a particular component of a record. For example in Name and Address Maintenance there are three main data types on the form, the Name, Communication Details and Information Details. Your cursor must be located on the correct data type. For instance, to create a User Defined Field against the Name your cursor must be located in the name data type area e.g. on the Surname field. It is recommended that you always position the cursor on the first field within the data type that you wish to attach the User Defined Field to.

Field types available are :-

- Text fields only
- Image fields only
- Both Text and Image

Textual fields may be validated against a predefined list of valid data. In addition, an entry format may be defined for textual fields.

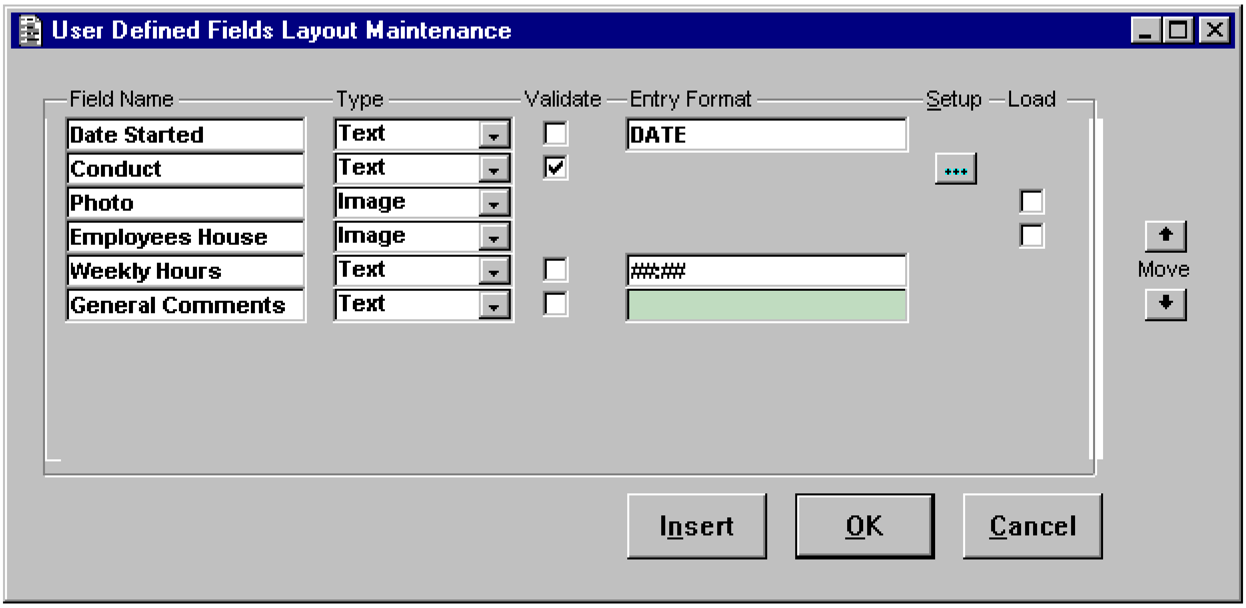
The User Defined fields function is accessed from the "Associated" menu item. Selecting the "Fields" item will enable you to establish and maintain user-defined fields.

If no user-defined fields exist then you will be presented with the User Defined Fields Layout Maintenance form. If user defined fields already exist you will be presented with the User Defined Fields Maintenance Form, at this point you should choose the Setup button to access the Layout form.

To maintain User Defined fields that are of a type "Image" select the Images/Objects item from the "Associated" menu item.

User Defined Fields Layout Maintenance Form

This form is used to establish User-Defined Fields.
Press the Insert Button to create a new user defined field.



Create User Defined fields form

Field Name
Enter the description of the User Defined Field. This field description will be displayed to the user when entering data.

Type
Select the data type from the drop down list box. The following data types are available:-

- Text
- Image
- Both (Text & Image)

Validate
This is a check box type field. It will only be displayed if the data type for the user-defined field is Text.

If the check box is switched on then the user is restricted to data that is established in a predefined list. See the User Defined Values Maintenance form.
If the check box is not switched on then the user may enter any alphanumeric data (subject to formatting rules).

Entry Format
This field is only displayed if the data type for the user-defined field is Text. If no input mask is required then leave this field blank.

This field determines what input and validation is required by the system. The following input masks are available:-

Mask Entry	**Description**
DATE	This mask will force the user to enter a valid date in the field.
#	This mask will force the user to enter a numeric value in each position designated in the mask. e.g. ##.## will force an entry of 2 significant digits, a point and two fractional digits. For example 37.26
*	An asterisk in this field allows any alphanumeric input.
?	Indicates that the field requires the entry of a single alphanumeric character. For every question mark in the Entry Format field the user is required to enter a character. For example ??? requires the input of 3

	alphanumeric characters.
(Any other alpha numeric character)	If any other character is placed in the Entry Format field then that character is required. For example if the entry format is ?A? then the user is required to enter a single alphanumeric character, followed by an A, followed by another single alphanumeric character. e.g. BAG. The characters entered here are case sensitive.

The masks may be used in combination with each other (except for the date mask).

e.g.
##, A*   The user must input two numbers, a comma, an A and any other characters.

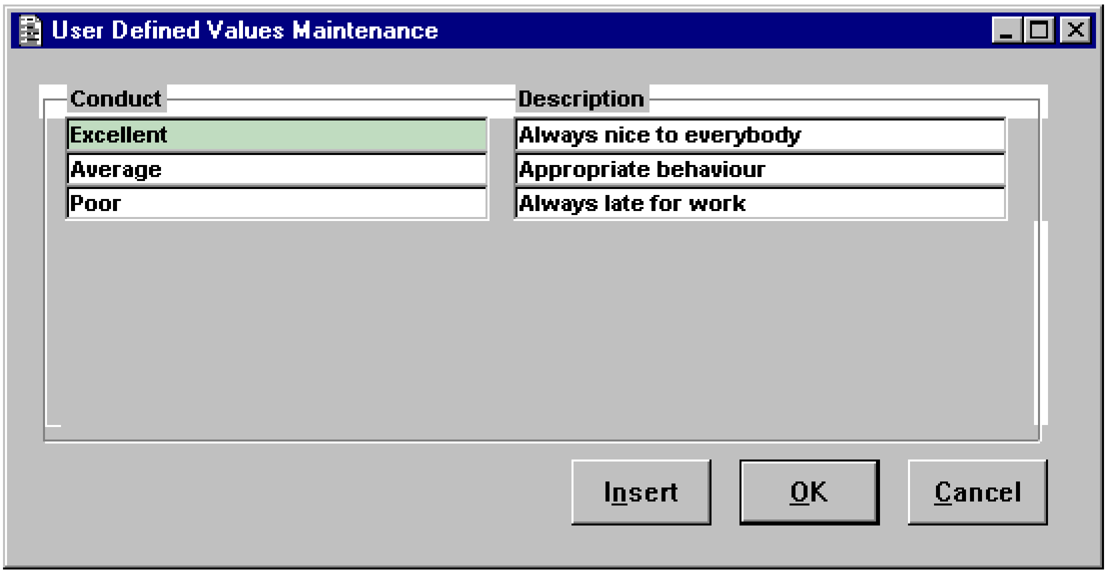
Setup Button
If the Validate Field has been checked on, activating this button will take you to the User Defined Values Maintenance form to establish the valid data for the user-defined field.

Load
This field is only available with user defined fields that are of a type "Image".
By checking this box on, the image that the user selects will be copied and stored within the database.
No editing of the image is allowed if the image is stored within the database.
By leaving this check box blank, the system will "link:" to the image file selected by the user.

Move Up/Down Buttons
These buttons are used to sequence the user defined fields in the order in which you wish to present them to the user.
By selecting a record and clicking the "Up" button, the record will be moved up the list of available fields.
By selecting a record and clicking the "Down" button, the record will be moved down the list of available fields.

User Defined Values Maintenance Form

This form allows the establishment of valid input data for a user-defined field, where the user-defined field has been marked as "Validate". See the User Defined fields Layout Maintenance form for information on the Validate field.



User Defined Values Maintenance Form

Field Name (e.g. Conduct)

This column contains the user values required for the user-defined field. The field name is reflected at the top of the column. In this example the field name is Conduct.
Any values entered in this form will be available for a user to select when editing the appropriate user defined field.

Description
Enter the description that is appropriate for the value entered in the field name value column.
This field is mandatory.

Using User Defined Fields

Your site may have established other fields that are not a normal part of the system. To access these fields your cursor must be located in the right position on the form.

Typically, your system supervisor will have specific instructions on how to gain access to user defined fields on forms where they have been established.

By way of example we are going to use the Name and Address system.

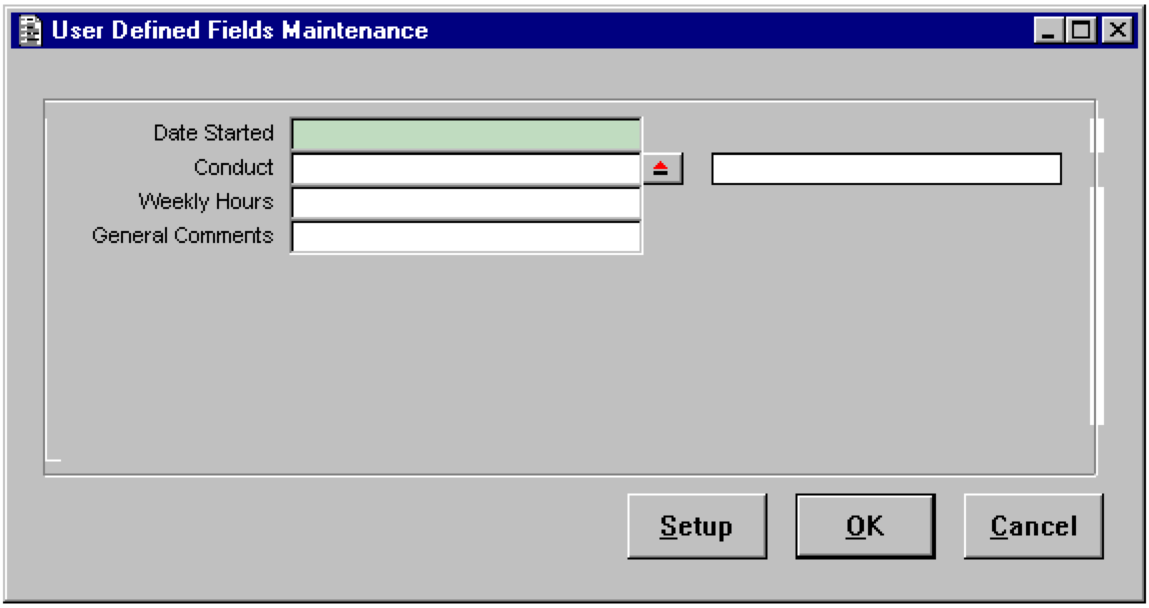
To gain access to the User Defined fields on the Personal Name Maintenance form your cursor should be located in one of the name fields.

Select Associated, Fields from the menu bar at the top of the screen.

This will display the User Defined Fields Maintenance Form.

User Defined Fields Maintenance Form

This form will allow entry of data into User Defined fields that are Text based. For User Defined fields that are of an Image type select Associated, Images/Objects from the menu bar at the top of the screen.



2*User Defined Fields Maintenance form*

Field Name
The field name associated with each field is user definable. As such the contents being entered into each field are also at the discretion of your organisation. Your system supervisor will provide you with valid documentation about the contents of each field.

Where a Pop Up Button is displayed against a field then entry is limited to only that contained within the Pop Up list. To gain access to the list you may either double click in the field or activate the Pop Up Button.

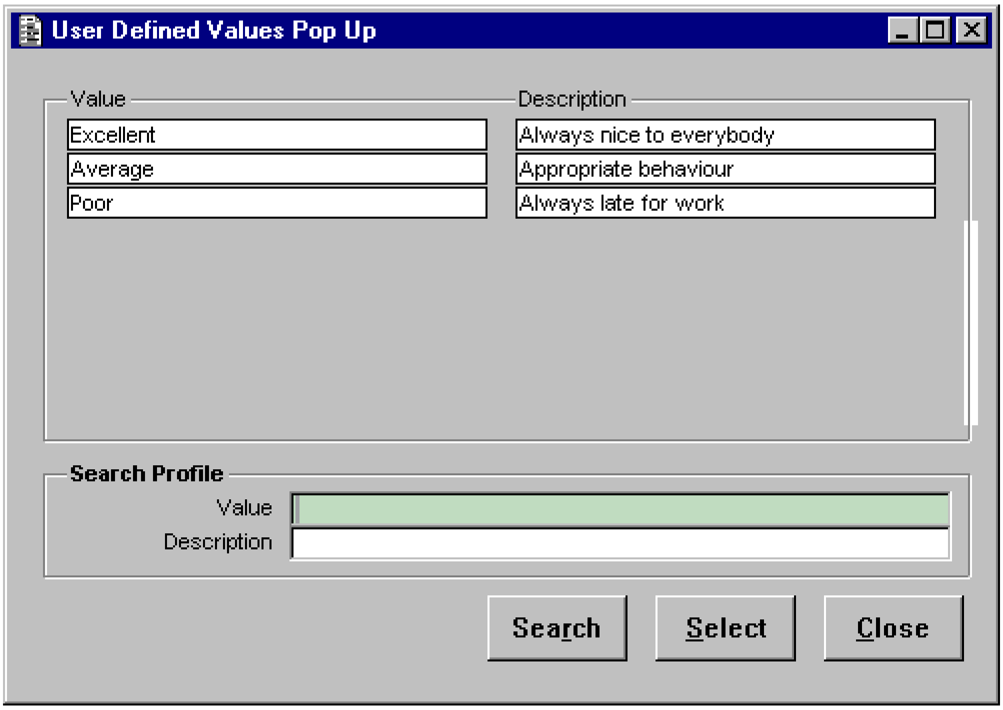
Where data is selected from a Pop Up list then the description is automatically populated in the field to the right.

Description

This field is only displayed if a list of valid input has been defined. The description of the data for the field will be automatically displayed.

User Defined Values Pop Up

This form displays a list of all valid input for the user-defined field you are editing.
Select the required text from the list using the Select Button or by double clicking on the occurrence.



3*User Defined Values Pop Up*

Value
This field contains the text that will be inserted into the user-defined field.

Description
This field contains the meaning of the inserted text. This text will be displayed on the User Defined Fields Maintenance Form alongside the text.

User Defined Images Maintenance Form

This form is used to assign images to a user-defined field.
The scroll bar on the right hand side of the form is used to move from one image to another. For example, if three User Defined fields are present, use the arrows on the scroll bar to move between the fields.

User Defined Images Maintenance Form

Refresh Button

This button is used to update the image in the form.
If the image has been modified using an appropriate image product then pressing Refresh will update the image to the latest version.

Edit Button

Activating this button will initiate the appropriate image product selected by your site to allow modification of the image file.

After editing the image the Refresh Button should be used to update the image on this form.
If the image has been stored in the database (as opposed to "linking" to the image) this option is not available. If this option is selected the message "Editing is not allowed on objects loaded into the database" will be displayed.

Load Button

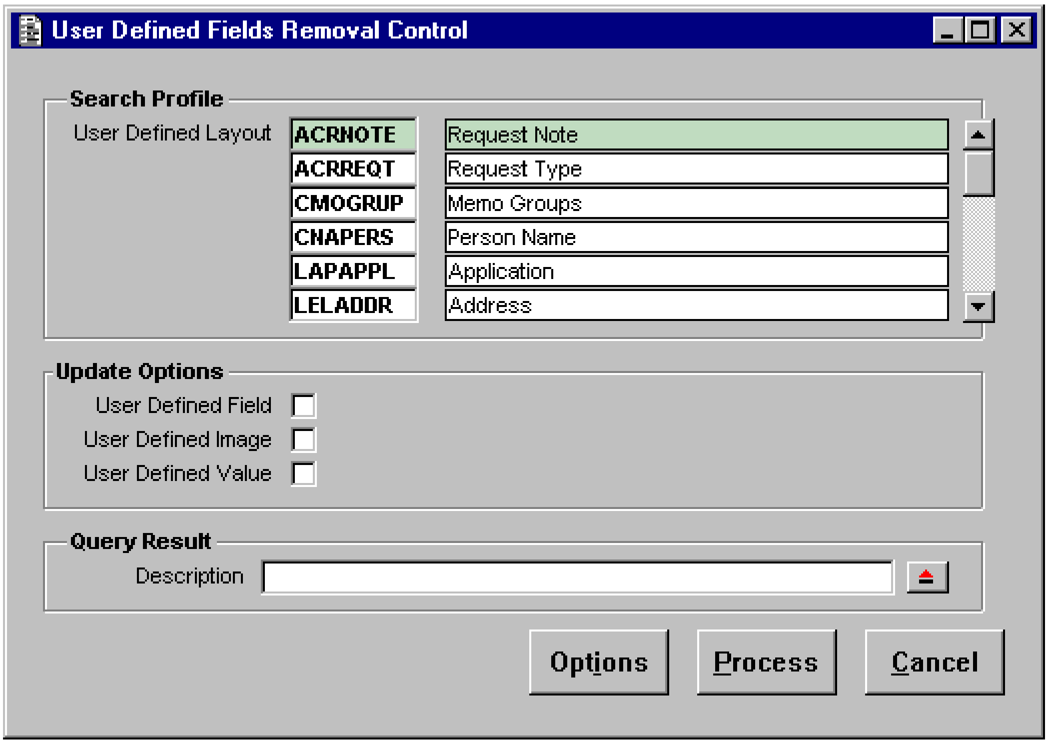
Activate this button to load an image into the User Defined Field.

If an image already exists in this field you do not have to delete it. When the new image file is selected it will replace the existing image.
When activating Load you will be presented with the "File Open" dialogue box. Select the appropriate drive and file name of the image you wish to load and press OK.

User Defined Fields Clean-up

The User Defined Fields Removal Form is used to remove the User Defined Field records that point at a deleted application record. For example, if a User Defined Field value was attached to a specific animal and the animal record was subsequently deleted, then the User Defined field value would not be deleted. A user Defined Field value would exist in CSYUFLD that did not point to anything as the LANANML record no longer existed.

User Defined Fields Removal Control Form



User Defined Fields Removal Control Form

Search Profile - User Defined Layout

The Search Profile – User Defined Layout shows those entities which have User Defined Fields associated to them. Highlight the Entity from which you wish to remove the user defined fields.

Update Options - User Defined Field

Tick on this Option to remove User Defined Fields for the selected User Defined Layout which have been defined as Field. At least one Update Option must be nominated for the process to continue.

Update Options - User Defined Image

Tick on this Option to remove User Defined Fields for the selected User Defined Layout which have been defined as Image. At least one Update Option must be nominated for the process to continue.

Update Options - User Defined Value

Tick on this Option to remove User Defined Fields for the selected User Defined Layout which have been defined as a Value. At least one Update Option must be nominated for the process to continue.

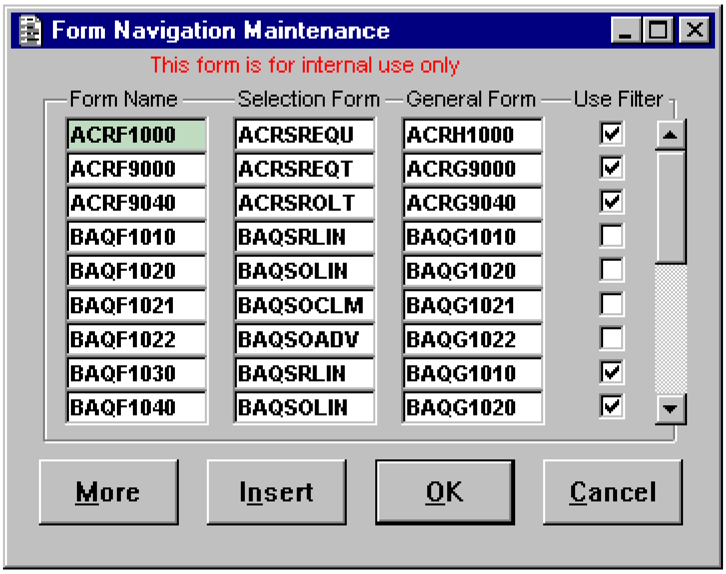
Query Result - Description

This field may be used to specify a previously created query definition to identify a group of records. Alternatively, a query may be selected from the pop up.

Form Navigation Maintenance

Form Navigation Maintenance Form

The Form Navigation Maintenance Form shows those processes which the user has defined as using a Filter Form. Ticking off and on the Use Filter field controls this process.



Form Navigation Maintenance Form

Form Name
The name of the Filter form is shown in this field. This is non maintainable.

Selection Form
The associated Selection form for the Filter form listed is shown in this field. This is non maintainable.

General Form
The associated General form for the Filter form listed is shown in this field. This is non maintainable.

Use Filter
Ticking the Use Filter field will instigate the use of the Filter Form listed.

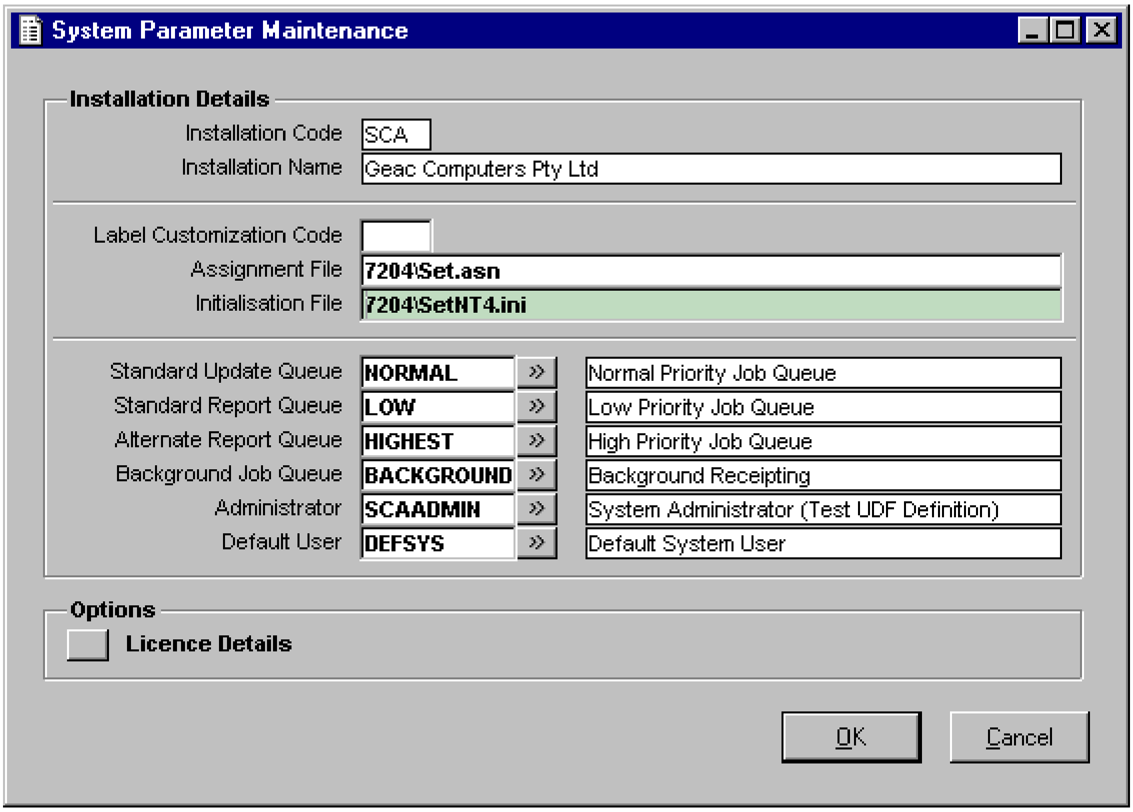
System Parameter Maintenance

This form allows the setting of certain system level items.

Licence Details are entered during the first log onto the Pathway System or via the System Administration / System Parameters / System Parameter Maintenance menu option.

System Parameter Maintenance Form

This form controls system level settings. It sets the installation code and other Licence details for Pathway.
The site administrator in conjunction with Infor staff specify most settings on this form and subordinate forms.



System Parameter Maintenance Form

Installation Code
This field contains a unique code for your site. Infor will supply the code.

Installation Name
This field contains the full name of your organisation. E.g. City of South Infor. The name entered here will be used on report headers etc.

Label Customization Code
Where non-standard language labels are required then the overriding code is entered here. This field should not be changed unless instructed by Infor.

Assignment File
This field contains the relative path location and name of the system assignment file (for example, ".\7206\Set.asn"). This will be defined during installation. If this field is left empty then an appropriate default will be automatically used.

For example, if the current Uniface version is 7.2.06 then a default of “.\7206\Set.asn” will be automatically used.

Initialisation File
This field contains the relative path location and name of the system initialisation file (for example, “.\7206\SetNT4.ini”). This will be defined during installation. If this field is left empty then an appropriate default will be automatically used.

For example, if the current Uniface version is 7.2.06 and the current operating system is Windows 2000 then a default of “.\7206\SetW2K.ini” will be automatically used.

Standard Update Queue

This field defines the system default standard update job queue. This job queue may be overridden at the Application Code level. This job queue will be used during the processing of batch jobs.

For example, you may nominate a job queue called UPDATE at the system level where all update jobs are sent. However, you wish to keep Rates Updates separate, so at the Application Code level for Rates you would nominate an overriding job queue.

Standard Report Queue

This field defines the system default standard report job queue. This job queue may be overridden at the Application Code level. This job queue will be used during the processing of batch jobs.

For example, you may nominate a job queue called NORM at the system level where all report jobs are sent. However, you wish to keep Rates reports separate, so at the Application Code level for Rates you would nominate an overriding job queue.

Alternate Report Queue

This field defines the system default alternate report job queue. This job queue may be overridden at the Application Code level. This job queue will be used during the processing of batch jobs.

For example, you may nominate a job queue called ALTN at the system level where report jobs may be sent. However, you wish to keep Rates reports separate, so at the Application Code level for Rates you would nominate an overriding job queue.

Background Job Queue

This field defines the job queue that is used currently for background processing of receipts. This will be expanded to other processes in the future. Only job queues that have a Job Queue Type of ‘Background Job Queue’ are available for selection from within the Pop Up. This field must have a job queue entered for the background processing of receipting to occur.

Administrator

This field contains the user id to be used to grant system administrator access. When logging on with the User ID nominated here you will be given access to certain items otherwise denied. For example, logging on as the system administrator will give you the authority to create user defined fields (as opposed to just be able to enter them).

Default User

This field contains the user id to be used as the “default user” within a responsibility structure.

When a user is not nominated specifically within a Responsibility Structure that user will take on the attributes associated with the “Default User Id”.

This user id does not have to be a “real” person. The user id may just be called DEFAULT and would normally never be used by anyone to actually “logon” to the system with.

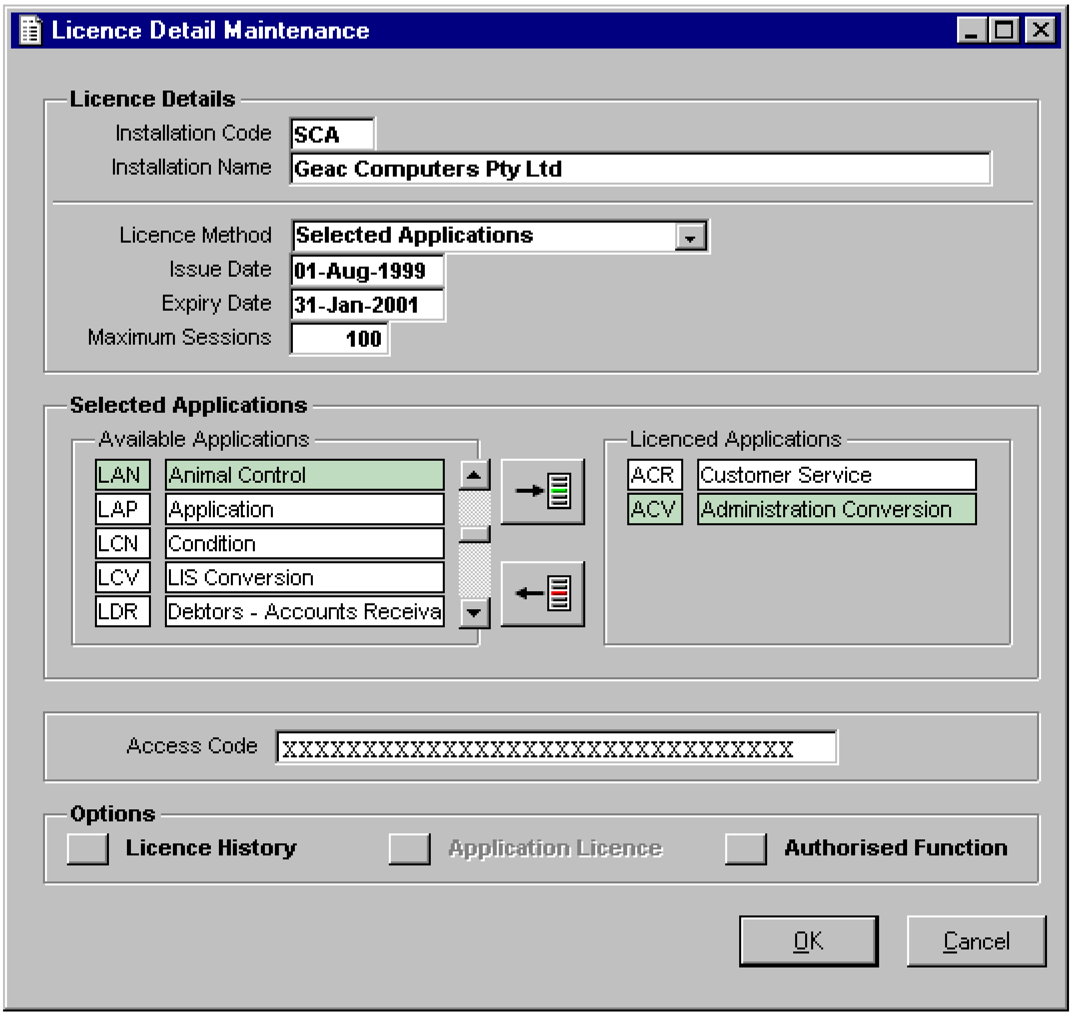
Options - Licence Details
Selection of this button displays the Licence Detail Maintenance form.

Licence Detail Maintenance

The “Licence Detail” Option Button on the System Level Parameters form enables Licence details to be displayed

Licence Detail Maintenance Form

The Licence Detail Maintenance form enables the Infor Licence parameters to be defined and set.



0-4 Licence Detail Maintenance Form

Installation Code
This field contains a unique code for your site. Infor will supply the code.

Installation Name
This field contains the full name of your organisation. E.g. City of South Infor. The name entered here will be used on report headers etc.

Licence Method
The number of Active Sessions concurrently logged on the Pathway menu system is controlled by the Maximum Sessions setting regardless of the Licence Method.

<u>All Applications</u>
There is no limit to the number of Active Sessions concurrently using a specific Pathway Application.

Selected Applications & Sessions
The number of Active Sessions concurrently using a specific Land Information or Administration Systems Pathway Application is controlled by an Access Code for each Pathway Application. Refer to the Pathway Application Based Licence Details section for more information.

Selected Applications
There is no limit to the number of Active Sessions concurrently using specific Licensed Pathway Applications.

Issue Date
The Issue Date is the date when Infor Computers Pty Ltd issued the Access Code.
The issue date is used to allow the Maximum Number of Active Sessions to be exceeded for a period of 60 days after the Issue Date.
i.e.:
If the number of Active Sessions exceeds the Maximum Sessions within 60 days of the Issue Date then the user is presented with a warning message but access to the menu system is granted.
If the number of Active Sessions exceeds the Maximum Sessions 60 days after the Issue Date then the user is presented with an error message and access to the menu system is denied.

Expiry Date
The Expiry Date is the date when the Access Code becomes invalid thus prohibiting any user access to the Pathway System. The expiry date is used for temporary evaluation copies of the system.

Maximum Sessions
The Maximum Sessions is the number of Active Sessions that can be concurrently logged onto the Pathway menu system.

An Active Session is deemed to be the unique combination of User Name and Client Personal Computer.
i.e.
- If user XYZ starts a Pathway session on a Client then this is one Active Session.
- If user XYZ starts another Pathway session on the same Client then this is still only one Active Session.
- If user XYZ starts another Pathway session on a different Client then this is an additional Active Session.
- If user XYZ and user ABC are logged onto the same Client then this is considered to be two Active Sessions.

Available Applications
The available Application Codes and their Descriptions are shown in these fields. By using the central Select buttons the Applications that are required for use by Council need to be moved to the Licensed Applications fields.

Note: The Available Applications information is only displayed when the Licence Method is 'Selected Applications'.

Licensed Applications
The Applications which have been Licensed for use are displayed in these fields.

Note: The Licensed Applications information is only displayed when the Licence Method is 'Selected Applications.

Access Code
The Access Code is issued by Infor Computers Pty Ltd and is based on the Licensing Details specific to each installation.

Options – Licence History Button
Selection of this button displays the Licence History Summary Maintenance Form.

Options – Application Licence Button
Selection of this button displays the Application Code Maintenance Form.

Note: The Application Licence Button is only available for selection if the Licence Method is 'Selected Applications & Sessions'. For all other Licence Methods this button is dimmed.

Options – Authorised Function Button

Selection of this button displays the Authorised Function Maintenance Form.

Licence History Maintenance

The “Licence History” Option Button on the System Level Parameters form enables Licence Utilisation levels for the current and previous days to be viewed.

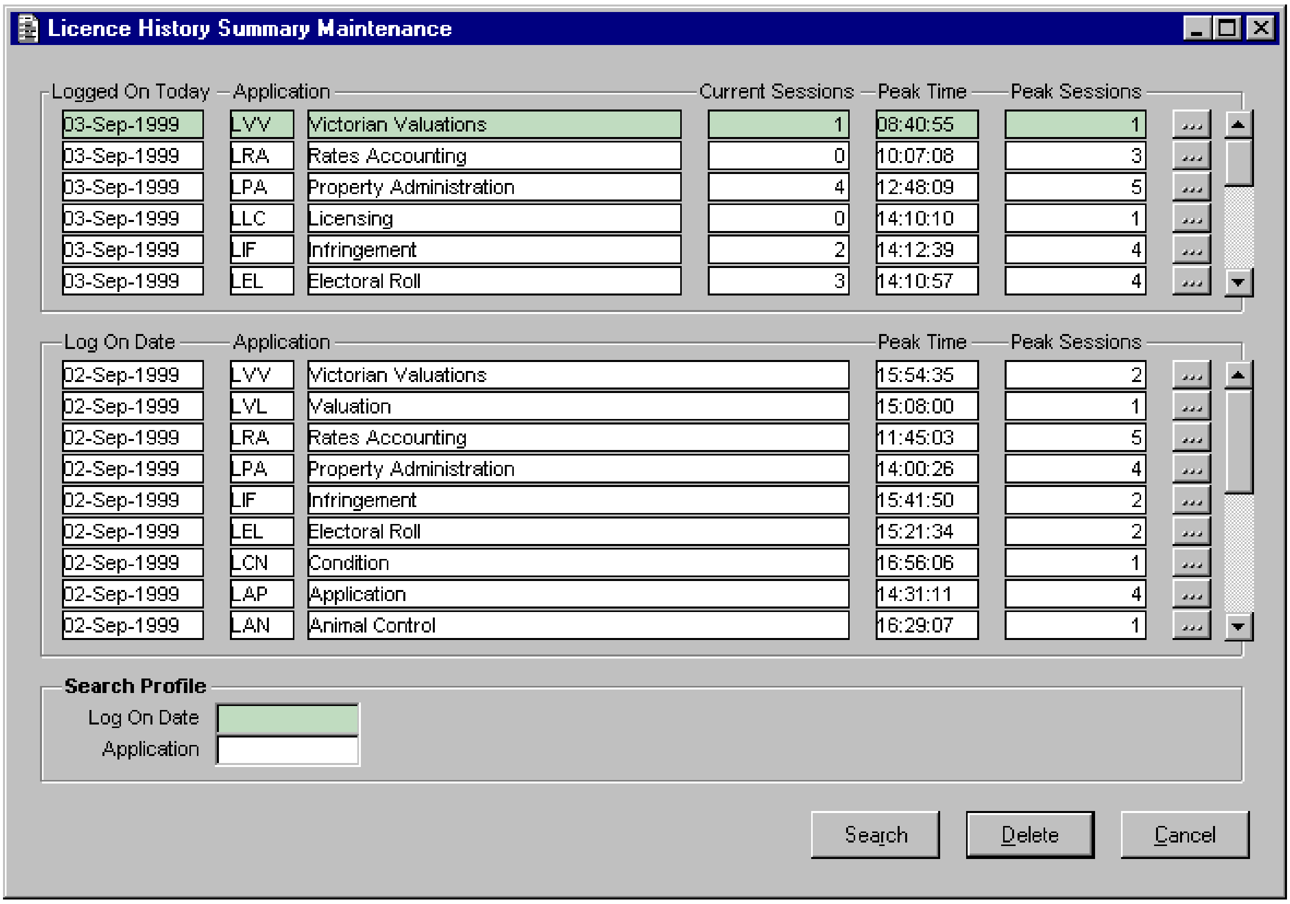
Licence History Summary Maintenance Form

This facility is useful to determine whether the peak number of Active Sessions is approaching the Maximum Number of Sessions.

The form is in two sections. The top section relates to active for the current date i.e. Today’s date and the bottom half relates to active for previous days. The Peak Time and Peak Sessions fields highlight the total number of users for that Application for a particular day.

Note that the information displayed on this form will be different depending on the type of Licence Method in place. If the Licence Method being used is All Applications or Selected Applications then the only entries displayed on the Licence History Summary Maintenance form will be for CSY System. If the Licence Method being used is Selected Applications and Sessions then those applications which have a licence will also show on this form along with the CSY System application.

The use of the Delete button is only allowed on the bottom half of the form. Entries under the Logged On Today area are not able to be deleted.



Licence History Summary Maintenance Form

Logged on Today
The date shown in the Logged on Today field will be the current date i.e. Today’s date.

Application

The Application Code and Description are shown. If All Applications or Selected Applications licence then the only application to be shown will be CSY System. If Selected Applications and Sessions licence, then those applications with a licence will display along with the CSY System application.

Current Sessions
The Current Sessions value is the number of users who are currently signed onto the application at the time the form was displayed.

Peak Time
Peak Time relates to the time for a particular date that the highest number of users where concurrently signed onto that application.

Peak Sessions
Peak Sessions relates to the number of users that were signed on at the Peak Time. This represents the highest number of users that where concurrently signed onto that application. It is not the total number of users for that application for the whole day.

Detail Button
The “Detail” Button adjacent to each Licence History record enables the Active Sessions at any particular point in time during that day to be determined.

Log on Date
The Log on Date is the date that a user signed onto that particular Application.

Application
The Application Code and Description are shown. If All Applications or Selected Applications licence then the only application to be shown will be CSY System. If Selected Applications and Sessions licence then those applications with a licence will display along with the CSY System application.

Peak Time
Peak Time relates to the time for a particular date that the highest number of users where concurrently signed onto that application.

Peak Sessions
Peak Sessions relates to the number of users that were signed on at the Peak Time. This represents the highest number of users that where concurrently signed onto that application. It is not the total number of users for that application for the whole day.

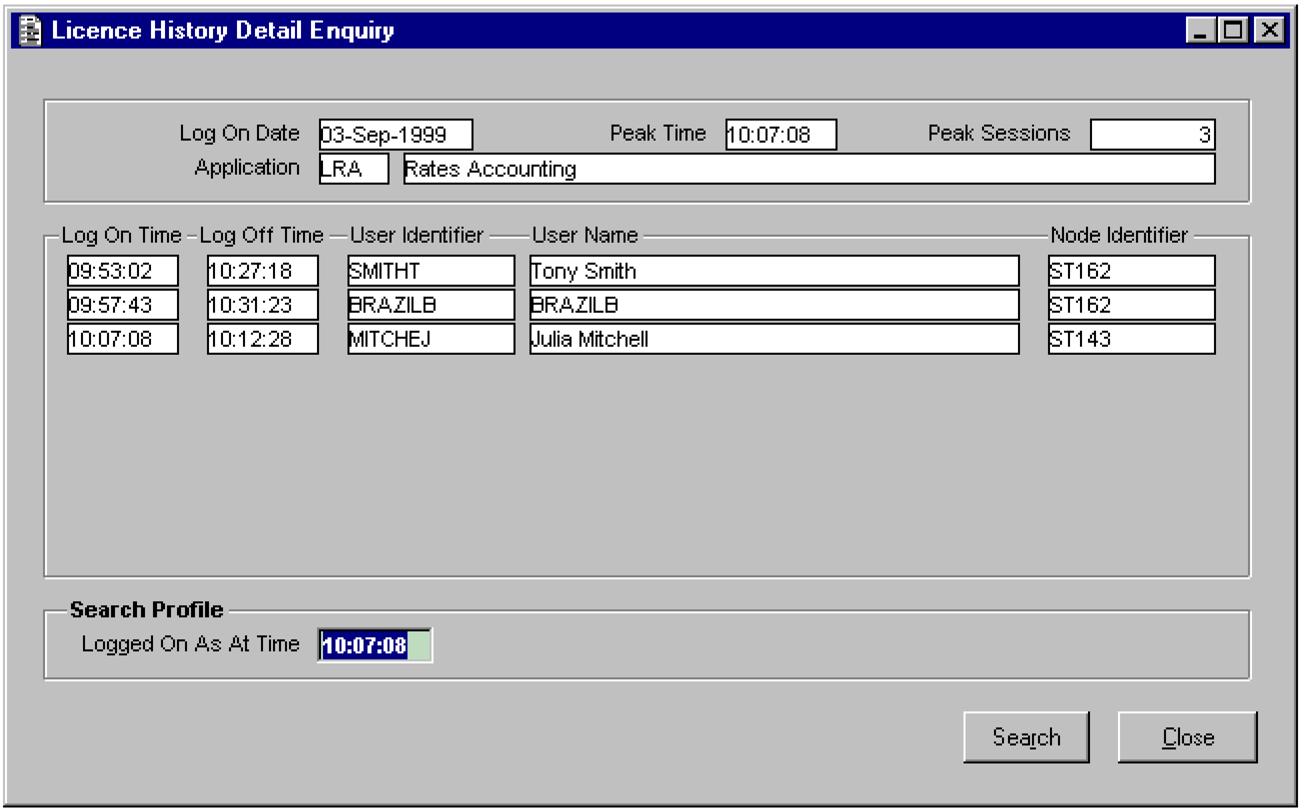
Detail Button
The “Detail” Button adjacent to each Licence History record enables the Active Sessions at any particular point in time during that day to be determined.

Search Profile – Log on Date
Using the Search Profile Log on Date you are able to position the bottom half of the form at the date entered in this field when the Search button is selected. This field can be used by itself or in conjunction with the Application field.

Search Profile – Application
Using the Search Profile Application you are able to display in the bottom half of the form the log on date entries for the nominated Application. No other applications are displayed. This field can be used by itself or in conjunction with the Log on Date field.

Licence History Detail Enquiry Form

The Licence History Detail Enquiry Form displays the users who have been or are still signed onto the application. When first displaying this form it will position at the Peak Time which was shown on the Licence History Summary Maintenance form. By changing the time in the Search Profile – Logged On As At Time, you are able to determine who was signed onto the application at a particular time.



Licence History Detail Enquiry Form

Log On Date
The Log On Date is the date for the selected application entry detailed out on from the Licence History Summary form.

Peak Time
The Peak Time represents the time that the highest number of concurrent users where signed onto the application for the selected application entry detailed out on from the Licence History Summary form.

Peak Sessions
The Peak Sessions value represents the highest number of concurrent users signed onto the application at the Peak Time.

Application
The Application Code and Description are shown for the entry detailed out from the Licence History Summary form.

Log on Time
For each of the User Entries the time that the user actually logged onto the application is displayed in this field.

Log Off Time
For each of the User Entries the time that the user actually logged off the application is displayed in this field. This field will be blank if the user is still currently signed onto the application.

User Identifier
The User Identifier is the User ID for the person who had or is currently signed onto the application.

User Name
The User Name is the name of the person who had or is currently signed onto the application.

Node Identifier
The Node Identifier is the workstation or PC ID that the user was using at the time of signing onto the application.

Search Profile – Logged On As At Time

The value defaulted into this field represents the Peak Time. This then defaults the Peak Time / Sessions information on the form showing those users who were signed on at the Peak Time.

Changing the time in this field and using the Search button will show those users who were logged on to the application at the time nominated in the Logged On As At Time field.

If Licence Details for the current date are being displayed then double-clicking on this field will update it to the current time to allow a search to be selected.

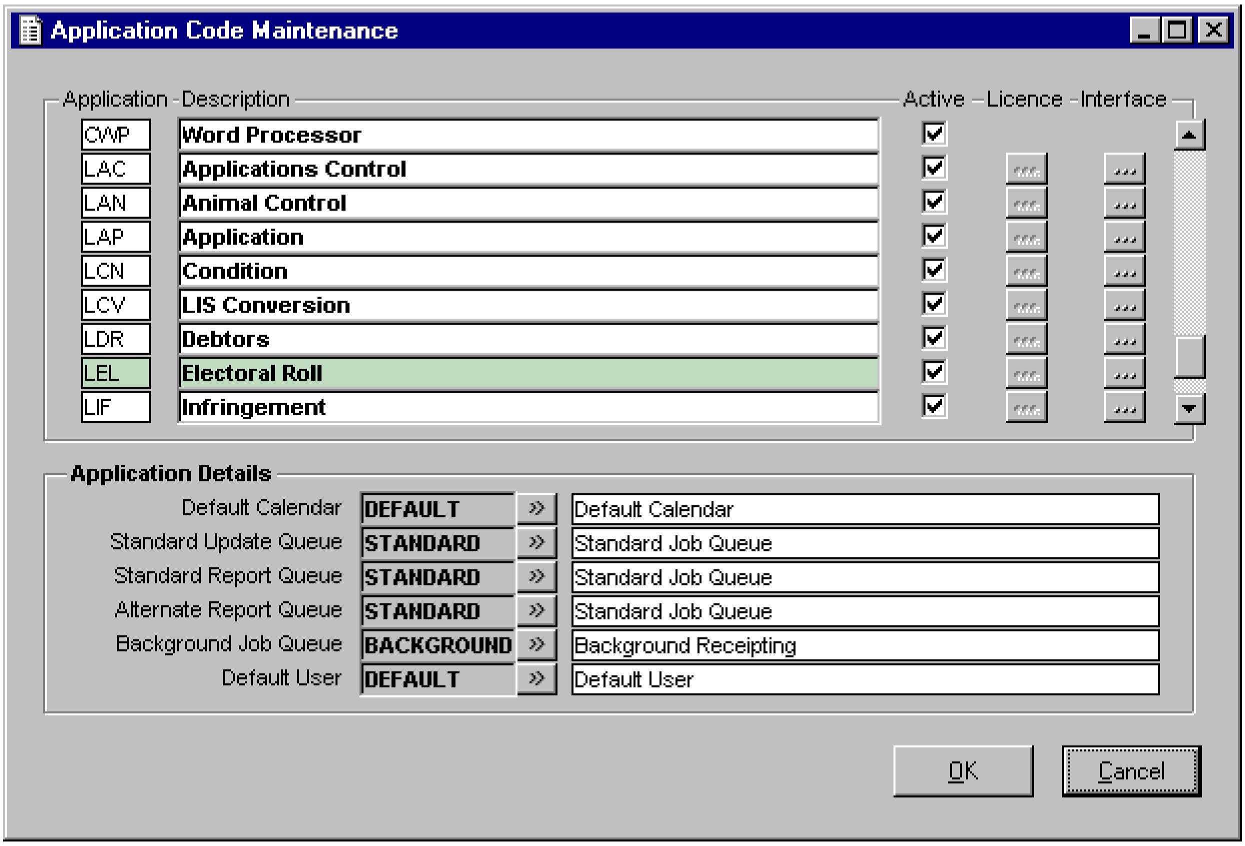
Application Code Maintenance

This function controls the maintenance of application codes throughout the Pathway system. Access to this information is via menu Application Code Maintenance or selecting the Application Licence Option from the System Parameter Maintenance form.

Application Code Maintenance Form

The Application Code Maintenance Form shows the Applications which are active and allows users to detail out to the Licence information (if Licence is Application Based) and also to the Interface form which shows the applications that interface with the application detailed from.

The Application Details information shown on the bottom half of the form relate to the application currently highlighted. It is therefore possible to have different setup information for each application.



Application Code Maintenance Form

Application
This field contains the unique code assigned by Infor to each Module.
This field is display only and may not be maintained.

Description
This field contains the description of the module.
This field may be changed, for instance, Customer Service may be changed to Customer Complaints.

Active
The active flag determines whether or not the module is in use.

If you are not using a module then the flag should be turned off. For example, if you do not wish to capture any Audit information, particularly during conversions, or in a testing environment, then turn off the Active flag.

Licence
Pressing this button will display the Application Access Code Maintenance form. This form contains details (at the application level) the number of concurrent licences, issue and expiry dates. This button is only available for Selected Application & Sessions based licence.

Interface
Pressing this button will display the Application Interface Maintenance form. This form controls which modules are accessible to the current module. For example, if you detailed out on the Applications module you would see that Customer Requests, Conditions, Application Control, Licensing, Property Administration and Infringements have been selected.

Default Calendar

This field contains the name of the default calendar that will be used by the module. If it has defaulted in from the system parameter it will be displayed in "grey". When the Calendar has been overridden from the system parameter it will be displayed in normal mode i.e. black on white.

Standard Update Queue

This field contains the name of one of the batch queues for each module. If it has defaulted in from the system parameter it will be displayed in "grey". When the batch queue has been overridden from the system parameter it will be displayed in normal mode i.e. black on white.

The queue nominated here will be available on batch processing forms (i.e. reports) to submit job to.

Standard Report Queue

This field contains the name of one of the batch queues for each module. If it has defaulted in from the system parameter it will be displayed in "grey". When the batch queue has been overridden from the system parameter it will be displayed in normal mode i.e. black on white.

The queue nominated here will be available on batch processing forms (i.e. reports) to submit job to.

Alternate Report Queue

This field contains the name of one of the batch queues for each module. If it has defaulted in from the system parameter it will be displayed in "grey". When the batch queue has been overridden from the system parameter it will be displayed in normal mode i.e. black on white.

The queue nominated here will be available on batch processing forms (i.e. reports) to submit job to.

Background Job Queue

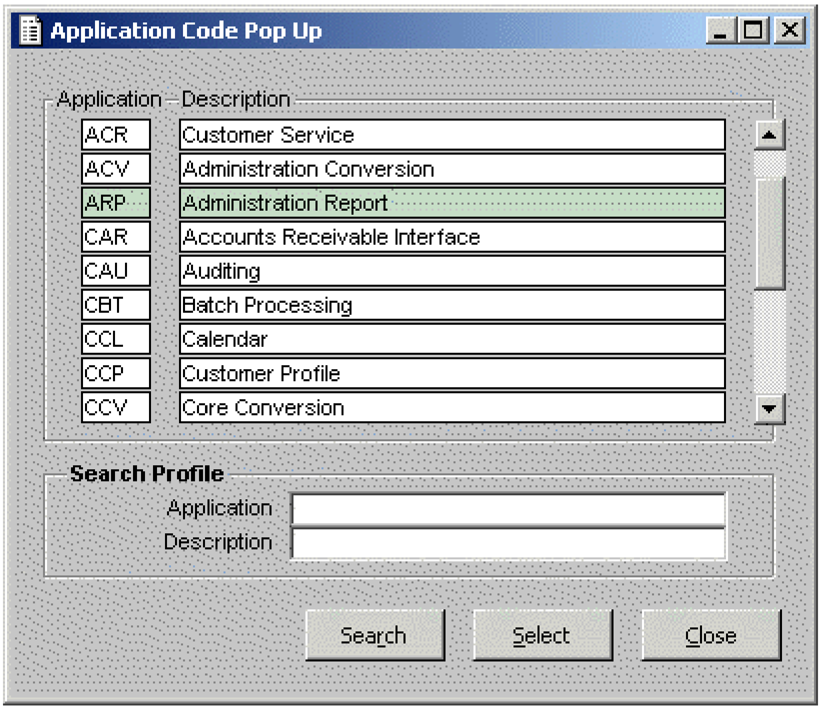
This field contains the name of one of the background job queues for each module. If it has defaulted in from the system parameter it will be displayed in "grey". When the batch queue has been overridden from the system parameter it will be displayed in normal mode i.e. black on white.

Default User

This field contains the name of the user id that has been nominated as the 'default' user for the module. The User id will be defaulted from the System Parameter however may be overridden. This default user id is used to assign default attributes for the responsibility system. If a user is not specifically nominated within a responsibility structure for a module then the user will take on the attributes assigned to the "default user". If it has defaulted in from the system parameter it will be displayed in "grey". When the Default User has been overridden from the system parameter it will be displayed in normal mode i.e. black on white.

Application Code Pop Up

The Application Code Pop Up form allows an Application Code to be selected in various forms throughout Pathway.



Application Code Pop Up Form

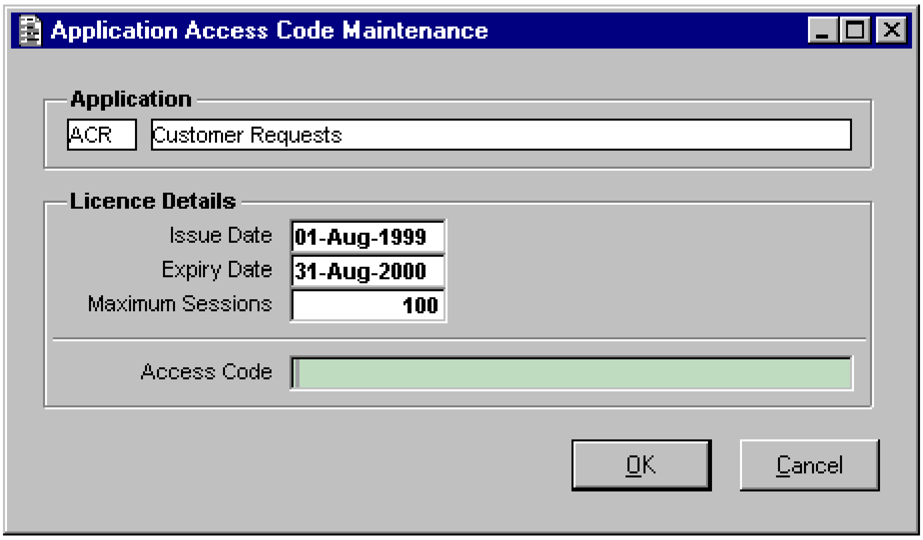
Application
This field displays the Application Code e.g. ACR.

Description
This field displays the Description of the Application Code e.g. Customer Service.

Search Profile – Application / Description
These fields allow a search profile to be entered on which to conduct a search. This function is useful when there are more than nine occurrences. Wildcard searching is available. Note that these fields are case sensitive.

Application Access Code Maintenance Form

This form controls the number of concurrent application sessions, issue and expiry date details.



Application Access Code Maintenance Form

Application

This field displays the application code and description for the licence details currently being displayed.

This field is display only and may not be maintained.

Issue Date
The Issue Date is the date when Infor Computers Pty Ltd issued the Access Code.
The issue date is used to allow the Maximum Number of Active Sessions for a specific Application to be exceeded for a period of 60 days after the Issue Date.
i.e.:
If the number of Active Sessions exceeds the Maximum Sessions within 60 days of the Issue Date then the User is presented with a warning message but access to the Application is granted.
If the number of Active Sessions exceeds the Maximum Sessions 60 days after the Issue Date then the User is presented with an error message and access to the Application is denied.

Expiry Date
The Expiry Date is the date when the Access Code becomes invalid thus prohibiting any user access to a specific Pathway Application. The expiry date is used for temporary evaluation copies of an Application.

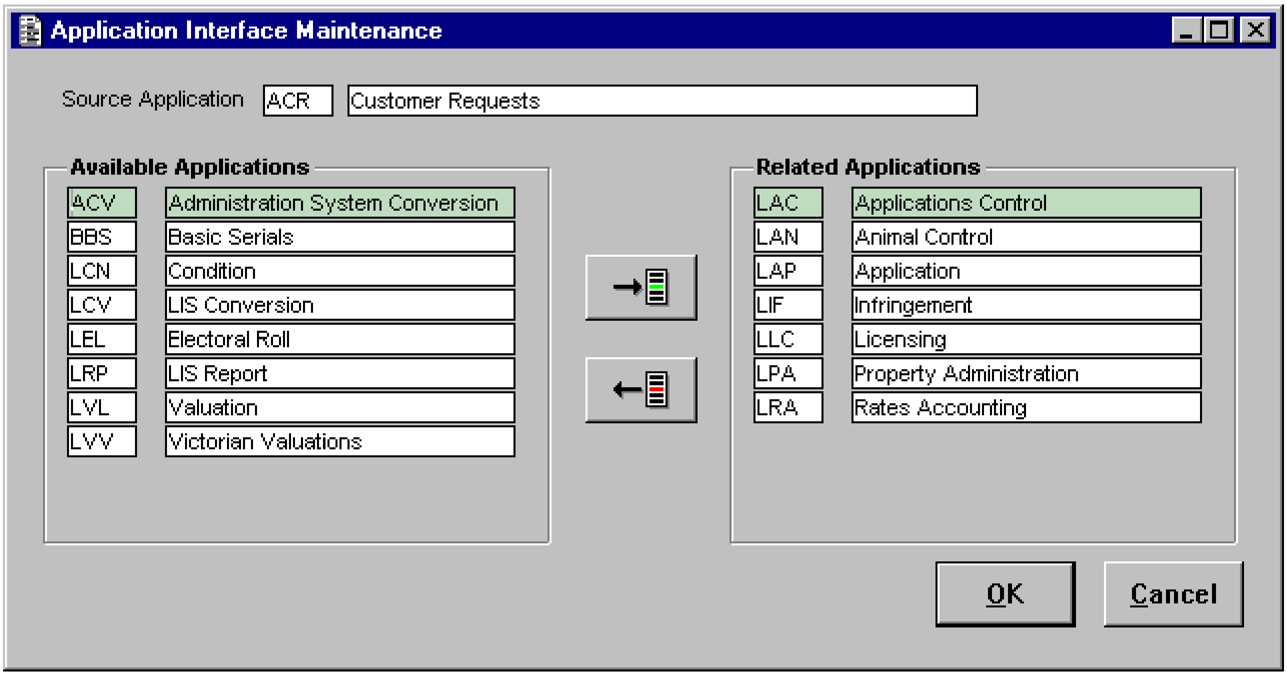
Maximum Sessions
The Maximum Sessions at this level is the number of Active Sessions that can be concurrently logged onto the specific Land Information or Administration System Pathway Application.
There is no limit to the number of Active Sessions concurrently using a Core System Pathway Application.
i.e.:
An Application and Sessions Based Licence is not applicable to any Pathway Application with a code commencing with the letter “C”. (e.g. CNA – Name & Address)

Access Code
The Access Code is issued by Infor Computers Pty Ltd and is based on the Application Licence Details specific to each installation.

Application Interface Maintenance Form

This form controls which modules are accessible to the current module. For example, if you detailed out on the Applications module you would see that Customer Requests, Conditions, Application Control, Licensing, Property Administration and Infringements have been selected.

These interfaces are established during installation.



Application Interface Maintenance Form

Source Application
This field displays the current application module for which you are assigning interfaces.

This field is display only and may not be maintained.

Available Applications
This column displays all available applications.

Related Applications
This column displays all modules that have been selected to be available to the current module. To restrict access for a particular module, de-select the appropriate application. For example, if you do not wish the Applications Module to be able to link to Infringements, then de-select the Infringements application from this column by pressing the Remove Button.

Add Button
Pressing this button will move the currently selected application from the Available Applications column to the Related Applications column.

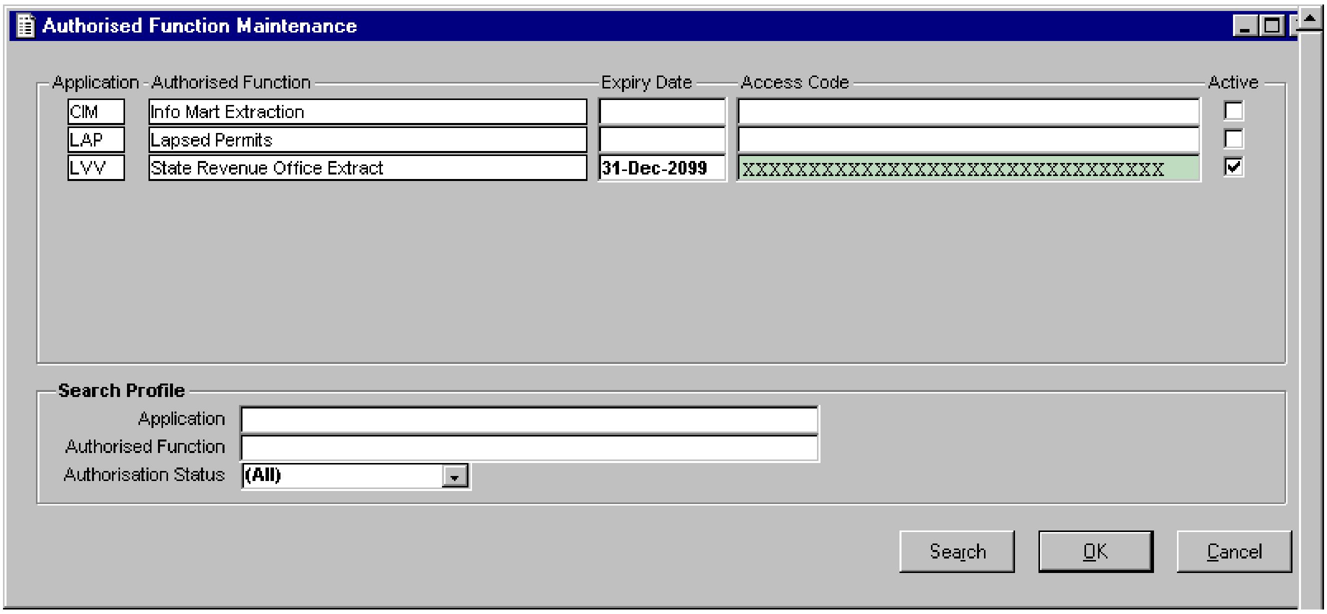
Remove Button
Pressing this button will move the currently selected application from the Related Applications column to the Available Applications column.

Authorised Function Maintenance

This function controls the maintenance of Authorised Functions throughout the Pathway system. This information is accessed by selecting the Authorised Function Option from the Licence Detail Maintenance form.

Authorised Function Maintenance Form

The Authorised Function Maintenance Form shows the Applications and their Authorised Function. Those Authorised Functions that have been authorised to be used will have an Expiry Date, Access Code and the Active Flag ticked on.



0-5 Authorised Function Maintenance Form

Application
The Pathway Application that the Authorised Function is associated to is shown in this field.

Authorised Function
The Authorised Function within a Pathway Application is described in this field.

Expiry Date
If an Access Code has been provided then the Expiry Date of the Access Code is displayed in this field. This date is supplied by Infor and although is maintainable, if changed a check is done to make sure that the correct Access Code has also been defined.

Access Code
An Access Code will be supplied by Infor if authorised to use the function. This Access Code will appear in this field.

Active
The Active field will be ticked on if the Authorised Function is available. If an Access Code and Expiry Date have been supplied then the Active field will also be set. If the Authorised Function is not required immediately, the Active field can be ticked off (with the Access Code still entered) and the Authorised Function will not be available. When the Function is required then all that is necessary to be done is to tick the Active field on.

Search Profile – Application

To display only those Authorised Functions for a particular Application, enter in the Application Code that is required, into this field. Wildcard searching can be used for searching for a particular Application or Application Codes that are similar.

Search Profile – Authorised Function

To search for an Authorised Function, enter in the name of the Authorised Function into this field. Wildcard searching can be used.

Search Profile – Authorised Status

There are three Authorisation Status to use for searching.

- All - which will display all Functions
- Authorised – which will display only those Functions that have been authorised for use
- Not Authorised – which will display only those Functions that have not been authorised for use.

User Maintenance

This function controls the maintenance of users within the Pathway system.

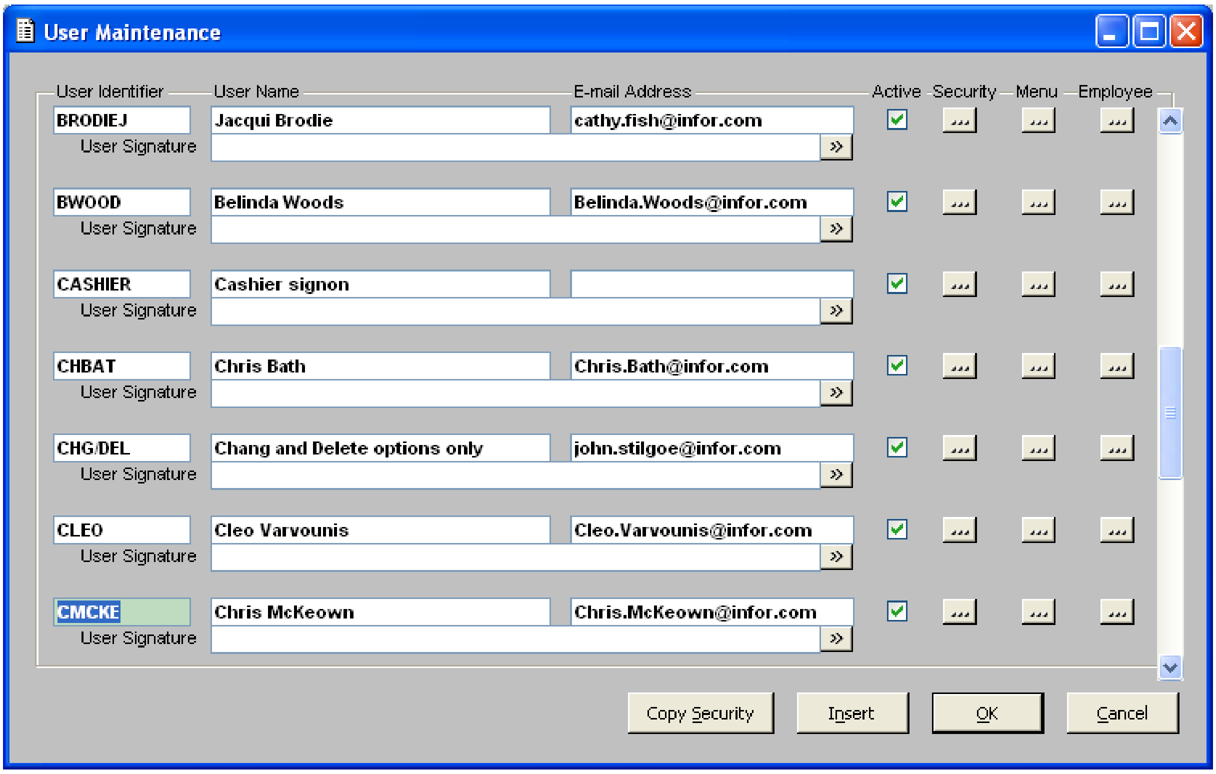
User Maintenance Form

To enable a user to logon to the system they must be established in User Maintenance. (See also the Menu System User Guide.)

This form is accessible via System Administration >> Menu >> User Maintenance.

Upon first displaying this form only ACTIVE Users are displayed. Inactive Users can be displayed by selecting the F7 then F8 keys to display ALL Users.

Additionally if F7 is used and the required User Identifier is entered followed by F8 to search then that User will be displayed whether they be Inactive or Active.



User Maintenance Form

User Identifier
This field contains a unique User Id for each user of the system.
Up to 20 alphanumeric characters may be entered.
This field is mandatory.

User Name
This field contains the user name associated with the user id.
This field is mandatory.

E-Mail Address
If you wish to take advantage of the e-mailing facilities within the system then the users e-mail address must be entered here. The internal e-mail address is generally used, however for external users the Internet address may be used.

Active
This field indicates whether or not the user id is active. If this flag is not turned on then the user id may not be used to gain access to the system.

Security Detail Button
This Detail button will allow access to ALL Security options for this User. This will enable the system administrator to maintain a Users access from one central location. These options are still maintainable within each of the Modules. Any changes to security made within the User Security option will automatically update module security.

Menu Detail Button

Employee Detail Button
Access to this option is secured by the Authorised Function "User Employee Contact Details". Selection of the Employee detail button displays the Employee Maintenance form showing the default Communication and Information Types defined on the User Employee Contact Details Maintenance form (Note: Types that are flagged as Active can be overridden or entered for this User).

User Signature
This field allows the selection or entry of a path pointing to an Image File that can be included as the User's signature. The document path will be validated and an error message will display if errors are found in the pathname. The Popup will cause a Windows 'FileBox' dialog to be displayed so that you may navigate to the location of the Image File. If the form is cleared using CTRL-G or F7, the User Signature field will be dimmed. It will also be dimmed when adding a User, until the User Name has been entered.

Merge Type Fields
The list of 'Document' management extract fields provided for inclusion on a Merge Type Template Document has been increased to include the following new fields:

Document_User_Id
Document_User_Name
Document_User_Signature

Note that the Document_User_Signature Merge Field will only return the UNC File Path to the user's Signature Image File. Therefore, in order to use this value, it is necessary to embed the Merge Field within an 'IncludePicture' directive. Within your document this should finish up looking like the following sample (Once the 'Toggle Field Codes' option has been selected for each field):

{INCLUDEPICTURE "{MERGEFIELD Document_User_Signature}" }

Note also that these Extract Fields refer to the identity of the User who generated a document. Where a document is re-generated, the user who performed the last generation is recorded for the document.

How to use the Document_User_Signature field in a Merge Document

The following steps may be followed to include a Signature Image file in a Pathway document:

1. In the Pathway Merge Type Maintenance Form, click on the Fields button
2. Assign the Merge Field Document_User_Signature
3. In the Merge Type Maintenance Form, click on the Edit detail button to open your Word Merge Document
4. Select the Microsoft Word Menu, Tools>>Options.
5. In the View tab, tick the Field codes check box and click OK. This will return you to your Word Document

6. Position your cursor in the document where you want the Signature to appear
7. Select the Microsoft Word Menu, Insert>>Field. The Microsoft Word Field popup box will appear
8. In the Field Names section double click on the word IncludePicture
9. The following statement will appear in your Word Document
   { INCLUDEPICTURE * MERGEFORMAT }
10. Place your cursor one space after the word INCLUDEPICTURE and insert the ‘Document_User_Signature’ Pathway Merge field
11. The statement will now appear as;
    { INCLUDEPICTURE { MERGEFIELD Document_User_Signature} * MERGEFORMAT }
12. Remove the, * MERGEFORMAT, from the statement.
13. The statement will now appear as;
    { INCLUDEPICTURE { MERGEFIELD Document_User_Signature} }
14. Enter " before the second open bracket and " after the first close bracket.
15. The statement will now appear as;
    { INCLUDEPICTURE "{ MERGEFIELD Document_User_Signature}"}
16. Return to Pathway and generate your document.

How to use the Document_User_Signature field in a Merge Document

The following steps may be followed to include a Signature Image file in a Pathway document:

In the Pathway Merge Type Maintenance Form, click on the Fields button

Assign the Merge Field Document_User_Signature

In the Merge Type Maintenance Form, click on the Edit detail button to open your Word Merge Document

Select the Microsoft Word Menu, Tools>>Options.

In the View tab, tick the Field codes check box and click OK. This will return you to your Word Document

Position your cursor in the document where you want the Signature to appear

Select the Microsoft Word Menu, Insert>>Field. The Microsoft Word Field popup box will appear

In the Field Names section double click on the word IncludePicture

The following statement will appear in your Word Document
{ INCLUDEPICTURE * MERGEFORMAT }

Place your cursor one space after the word INCLUDEPICTURE and insert the ‘Document_User_Signature’ Pathway Merge field

The statement will now appear as;
{ INCLUDEPICTURE { MERGEFIELD Document_User_Signature} * MERGEFORMAT }

Remove the, * MERGEFORMAT, from the statement.

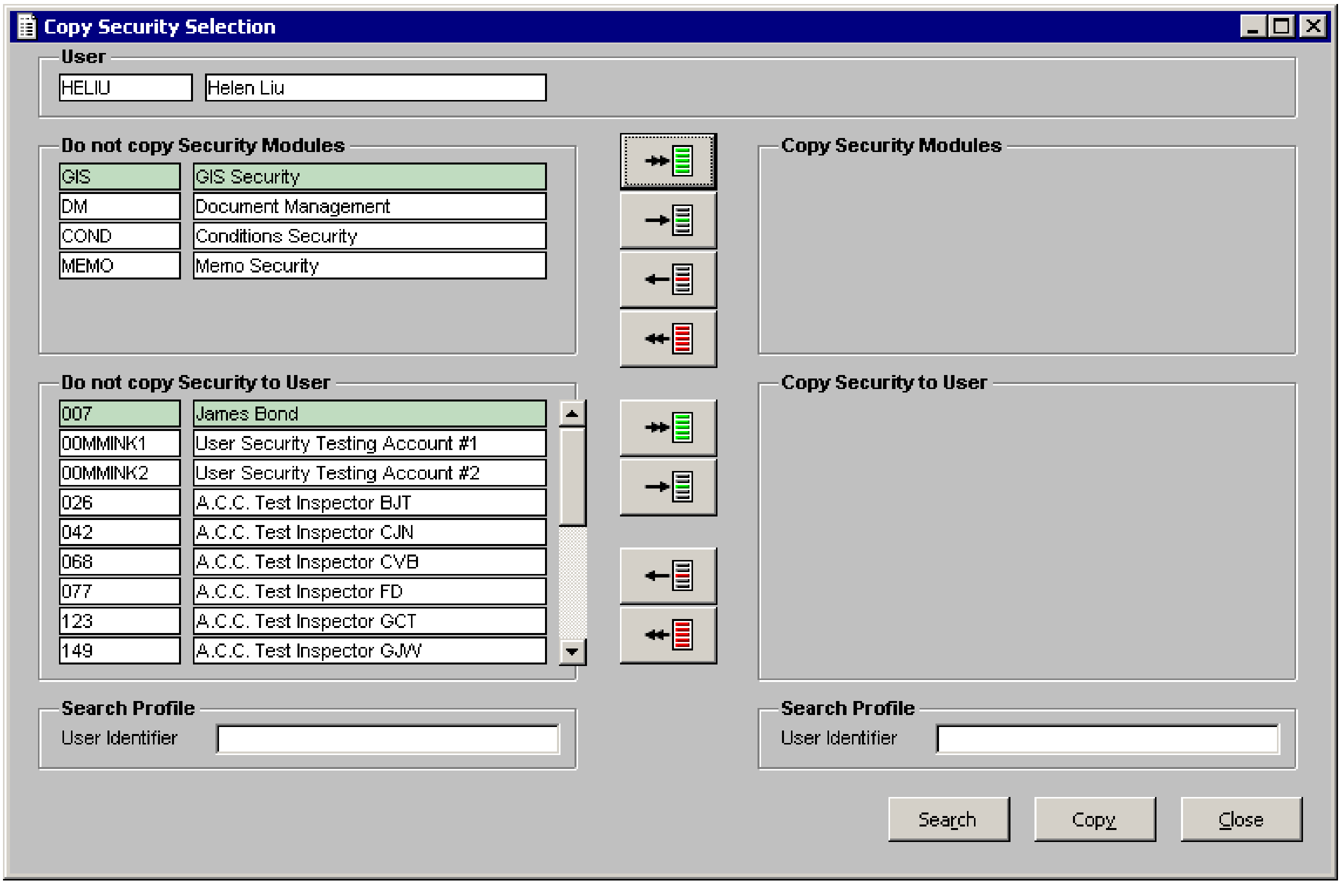
The statement will now appear as;
{ INCLUDEPICTURE { MERGEFIELD Document_User_Signature} }

Enter " before the second open bracket and " after the first close bracket.

The statement will now appear as;
{ INCLUDEPICTURE "{ MERGEFIELD Document_User_Signature}"}

Return to Pathway and generate your document.

Copy Security Button



Copy Security Selection Form

This form will Allow the System Administrator to set up on User profile with a generic Security setting, and the copy this security setting to all other users that fit the Security Profile. This will remove the need to set up security for each individual user.

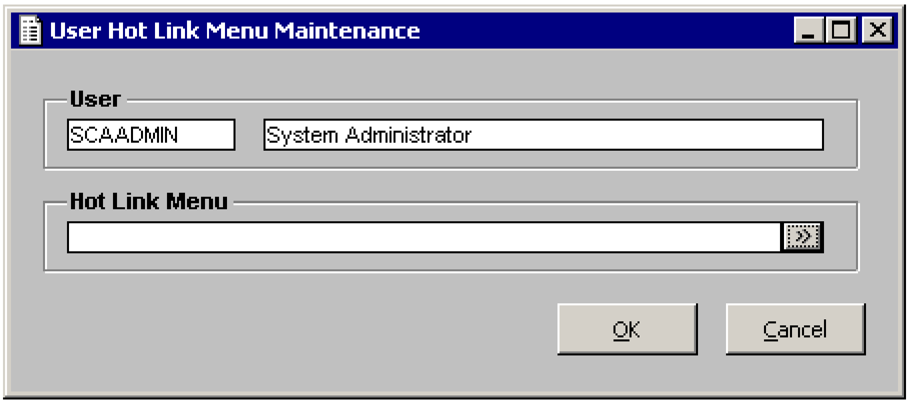
The screen is divided into two areas, one being the selection of the Module security to be copied and another being the selection of the User Profiles to copy the security settings to.

Using the move buttons in the middle of screen, assign those Module that you wish to copy, and then using the search profile at the bottom of screen or the scroll bar, locate and select those users that you wish to copy the security settings to.

Once you have completed your selections, Click on the Copy button to perform the Copy Security Function.

Any additional tailoring for individual users can then be performed.

Menu

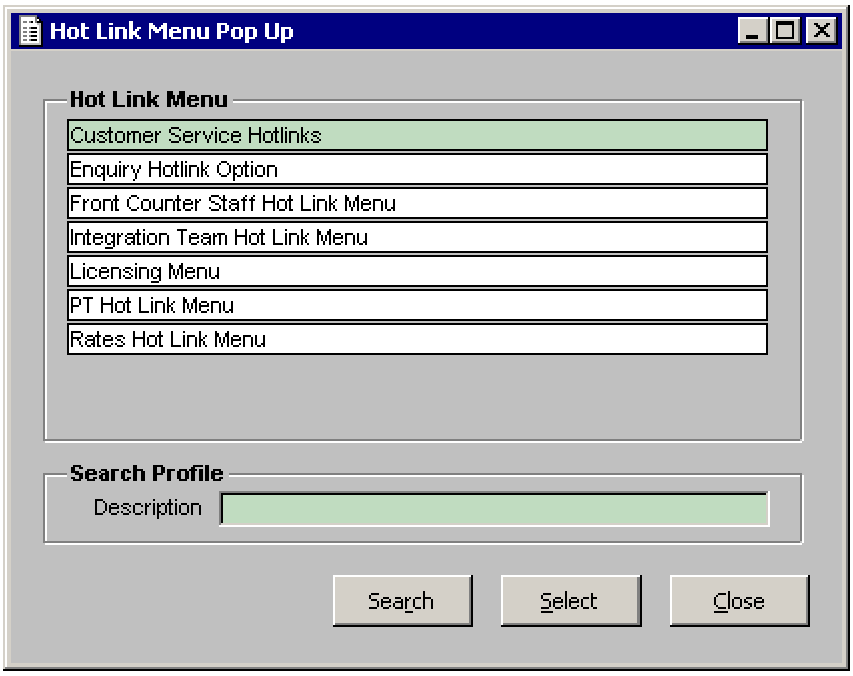


User Hot Link Menu Maintenance Form

The Menu Detail button will take you to Hotlink Menu Maintenance for the Selected User Profile. This will enable the Selection of an existing hotlink Menu to be assigned for this User. Use the Popup Button to select the required Hotlink User Menu.

Hot Link Menu

Use the Popup Button to select the required Hotlink User Menu from a list of pre-defined Hotlink Menus.



Hot Link Menu Pop Up Form

Highlight and click on select to attach the required Hot Link Menu for the nominated user. Use the Search profile at the bottom of screen to search for the Required Hot Link Menu. The list of Hot Link Menus must have been pre-defined in the following Menu Option:

System Administration >> Menu >> Hot Link Menu Maintenance

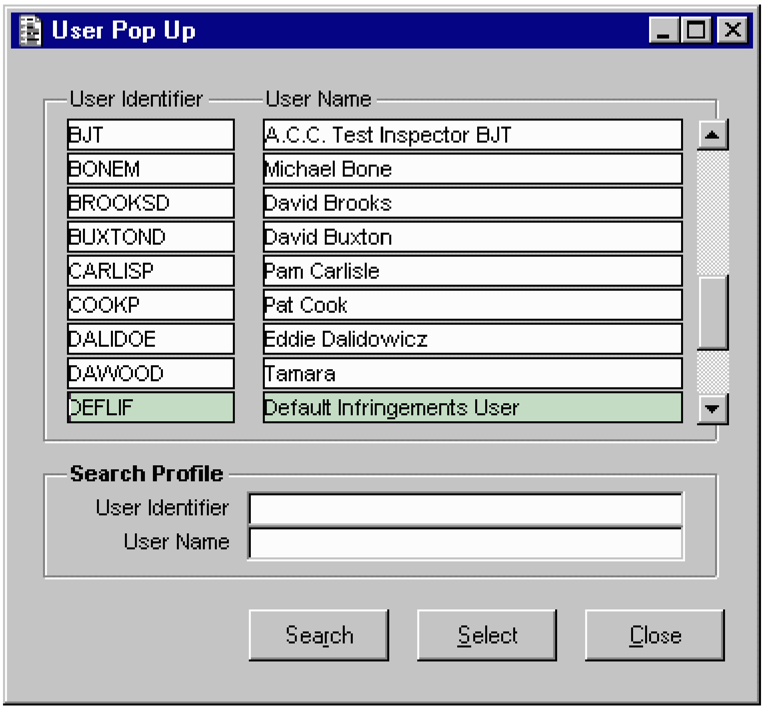
Hotlink Menus allow the user to invoke a list of Pathway options from any given Pathway screen. For example, this would allow a cashier to perform a property enquiry and then be returned to the Pathway Receipt Entry screen upon completion of the enquiry. This negates the need to either have multiple pathway sessions open or exit Receipt Entry to perform the search.

User Pop Up Form

The User Pop Up allows the selection of a User for a variety of fields throughout the system. Users are established in User Maintenance, which is accessible via System Administration >> Menu >> User Maintenance.

For example, Fields such as Responsible Officer and Receiving Officer within the Customer Service Module require selection of a User via the User Pop Up form.

The User Pop Up only displays Active Users when first displayed. When displaying this form via a Search Profile form it is possible to display Inactive Users by selecting the View / Display Inactive dropdown option on this form.



User Pop Up Form

User Identifier
This field displays a unique User Id for each user of the system. This field is display only and cannot be maintained.

User Name
This field displays the user name associated with the user id. This field is display only and cannot be maintained.

Search Profile - User Identifier
Enter a User Id on which to conduct a search. This field is useful when there are more than 9 User records in the system. Wild card searching is available in this field.

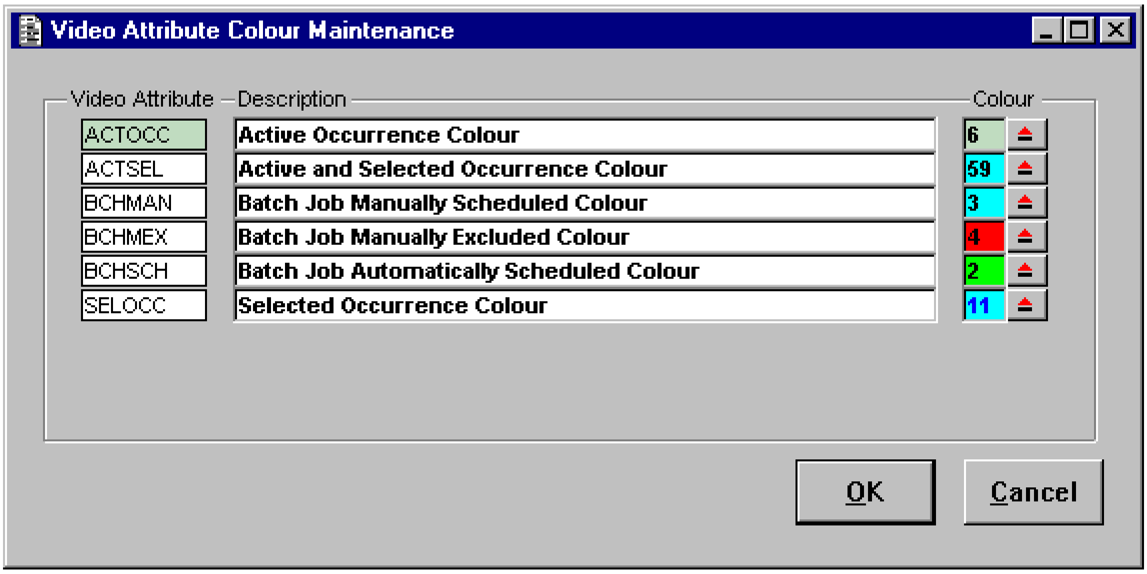
Search Profile - User Name
Enter a User Name on which to conduct a search. This field is useful when there are more than 9 User records in the system. Wild card searching is available in this field.

Video Attribute Colour Maintenance

This function controls the maintenance of video attribute colours within the system.

Video Attribute Colour Maintenance Form

This form is accessible via the System Administration >> System Parameters >> Video Attribute Colour Maintenance menu option.



Video Attribute Colour Maintenance Form

Video Attribute & Description
This field displays the code and description for the attribute you are currently setting.

ACTOCC – Active Occurrence Colour

The colour nominated here will be used when an occurrence has got focus. This is the normal state for an active record where the form being used is not a multi-select form e.g. Name Titles Maintenance.

ACTSEL – Active and Selected Occurrence Colour

The colour nominated here will be used when an occurrence is both the active occurrence and a selected occurrence. For example, on the customer service selection form (which is a multi-select form) you could select five occurrences. Only one of those occurrences would be the Active AND Selected occurrence, the other four would be selected occurrences only.

BCHMAN – Batch Job Manually Scheduled Colour

The colour nominated here will be used when viewing the batch calendar when scheduling jobs. Any dates that have manually scheduled jobs will be displayed in this colour.

BCHMEX – Batch Job Manually Excluded Colour

The colour nominated here will be used when viewing the batch calendar when scheduling jobs. Any dates where the user has manually excluded a day for a scheduled job will be displayed in this colour.

BCHSCH – Batch Job Automatically Scheduled Colour

The colour nominated here will be used when viewing the batch calendar when scheduling jobs. Any dates that have automatically scheduled jobs will be displayed in this colour.

Colour

This field displays the colour of the background and foreground for the attribute.
Select the required colour scheme from the colour pop up form by pressing the popup button associated with this field.

Search Profile Favourites

Search Profile Favourites are available on all Search Profile forms. Search Profile Favourites may be created, modified and selected via the Search pull-down menu option.

Search Profile Favourites can be used to save frequently used searches for later use.
The options are:
- Retrieve Search Profile Favourite
- Change Search Profile Favourite
- Save Search Profile as Favourite
- Default Search Profile Favourite Shift+F7

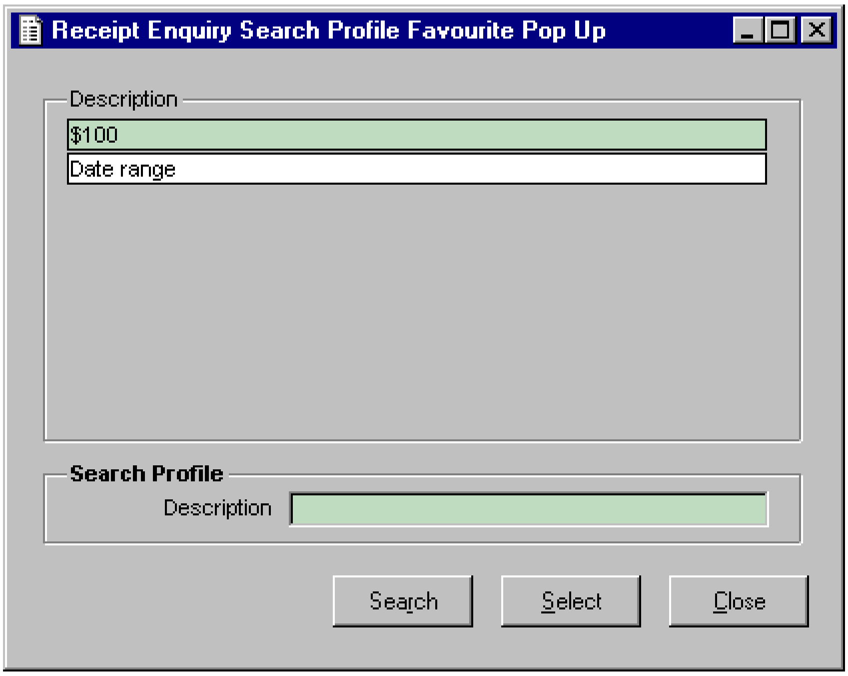
Default Search Profile Favourites are similar in concept to the 'Saved User Default' options available on Batch Processing forms.

If a user has recorded a Default Search Profile Favourite then the Search Profile fields will be populated with the previously recorded options whenever the menu option is selected. The cursor will also be positioned in the same field as when the favourite was initially saved.

If the user has changed the information on the selection form and they wish to have their Default Search Profile Favourite re-loaded to the selection form then the Shift+F7 keys can be used and the default favourite will be retrieved.

Search Profile Favourite Pop Up Form

This form displays a list of saved Search Profile Favourites to be used in a Search Profile Form.



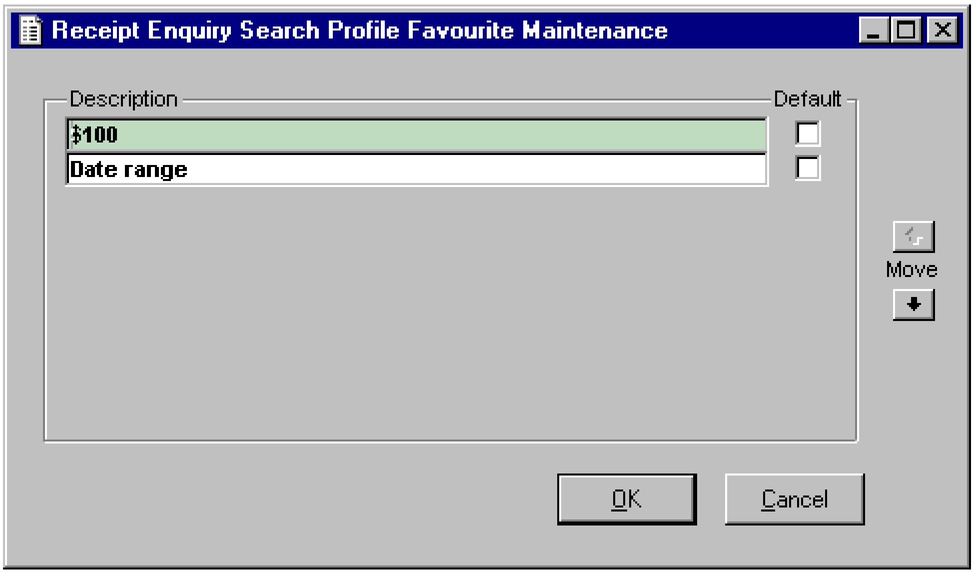
Search Profile Favourite Pop Up Form

Description
This field displays any saved Search Profile Favourites for selection.

Search Profile - Description
This field is used to search for a Search Profile Favourite to display in the Description field. Wildcard searching is available in this field. To conduct a search, enter a description and select the Search button.

Search Profile Favourite Maintenance Form

This form allows the user to enter and make changes to the Search Profile Favourite description as well as set up and maintain the default flag which indicates whether a Search Profile Favourite is to be used as the default Favourite.



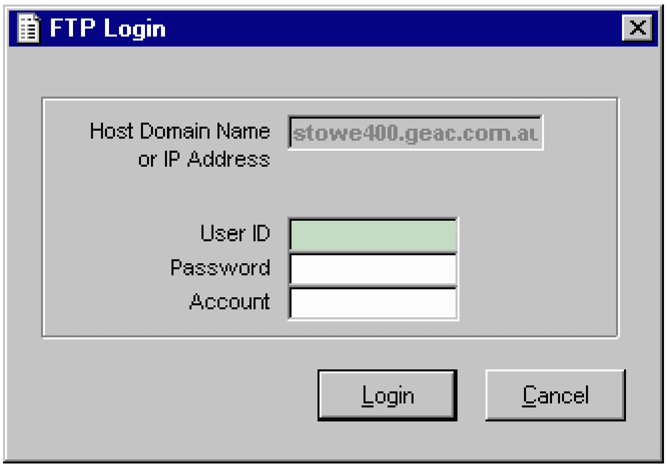
Search Profile Favourite Maintenance Form

Description
This field contains a description of the Search Profile Favourite. This field is maintainable.

Default
This flag should be checked on to establish a default Search Profile Favourite to be used whenever the Search Profile Form is accessed. The cursor will also be positioned in the same field as when the favourite was initially saved.

Move Buttons
Use the Move Buttons to reorder your Search Profile Favourites.

FTP Login Form



FTP Login Form

Host Domain Name or IP Address

User ID / Password

The User ID and Password are supplied by the Administrator of the Remote Server. They are used by the software to access the FTP location.

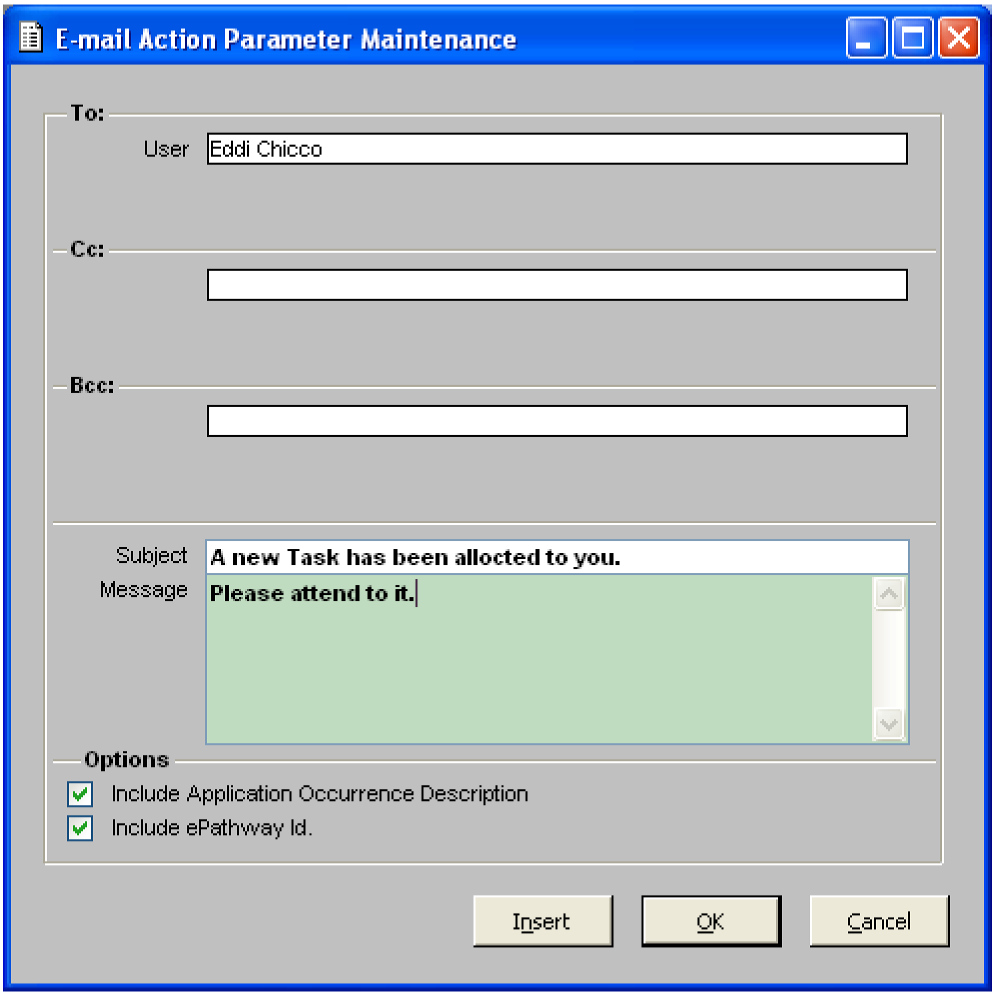
Account

The Account field is the Remote Server Account Number, which is supplied by the Administrator of the Remote Server. Most systems do not require this number, so it can be left blank.

Workflow Email Action Parameters

Email Action Parameter Maintenance Form

This form is used to enter details for an email action. The various Recipients may be entered as well as the Subject and Message to include on the email. An option also exists to include the Application Occurrence in the description text.



Email Action Parameter Maintenance Form

To
This field allows the email address of the intended recipient to be entered. Click the Insert button to allow entry. You will be prompted for a User or External address.

Cc
This field allows the email address of the intended ‘Copy to’ recipient to be entered. Click the Insert button to allow entry. You will be prompted for a User or External address.

Bcc
This field allows the email address of the intended “Blind Copy’ recipient to be entered. Click the Insert button to allow entry. You will be prompted for a User or External address.

Subject
Enter the Subject of the email in this field.

Message
Enter the Message of the email in this field.

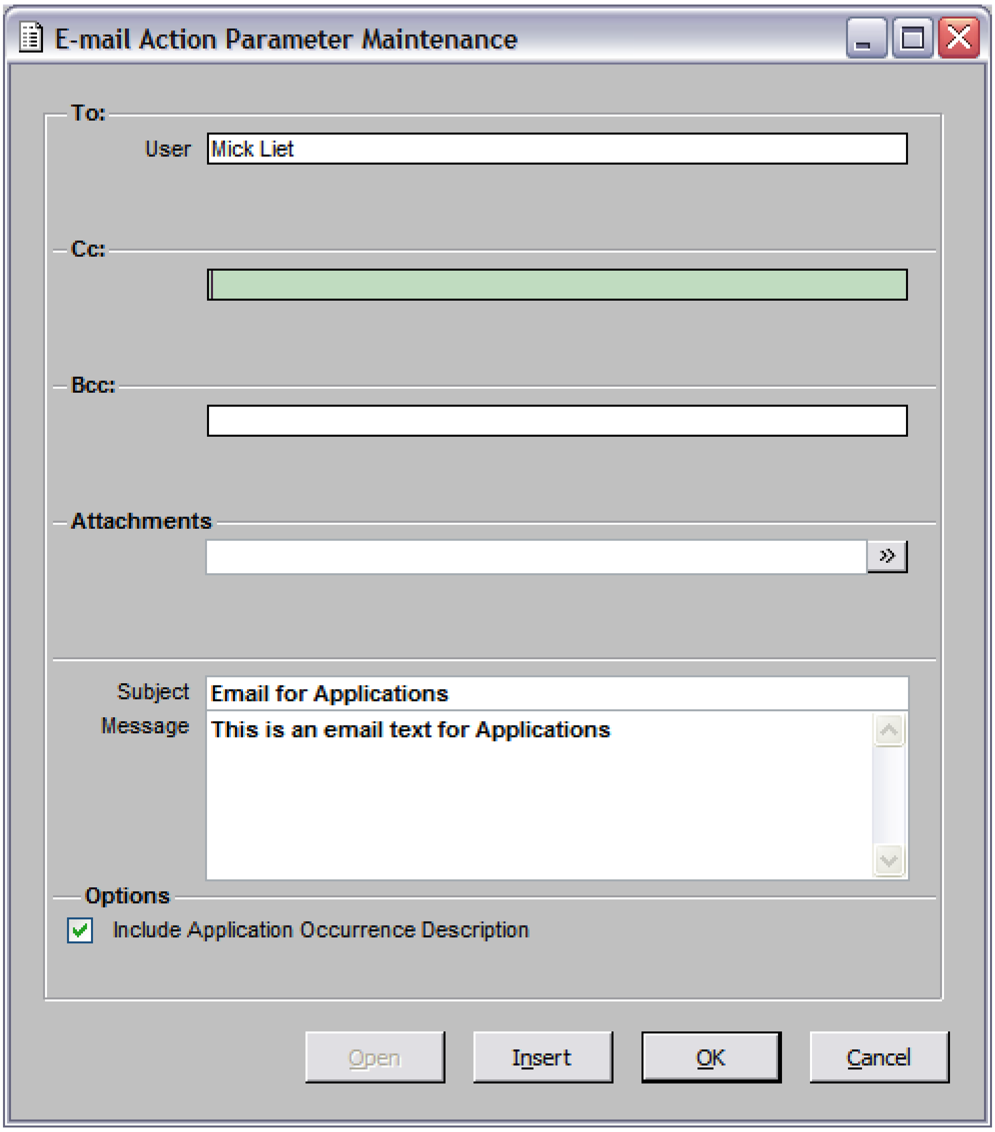
Options – Include Application Occurrence Description
Check this flag on if you wish to have the Description of the associated Application Occurrence included in the Subject Text of the email.

Options – Include ePathway ID
Check this flag on to enable the following functionality. When a Task, which has this User Action linked, is started, the ePathway ID number will be included in the subject line of the generated email provided that the Customer Request record was initiated via ePathway.

e.g. the Subject line of the generated email will contain the following information:

Subject: Request: 4046, General Complaint, ePathway Id: 54, A new request has been allocated to you

Email Action Maintenance Form



email Action Maintenance Form

To: User

This field displays the email address of the intended recipient which was set up in parameters. This name may be deleted and/or other users inserted. Click the Insert button to allow entry. You will be prompted for a User or External address.

Cc: User
This field displays the email address of the intended ‘Copy to’ recipient to be entered. . This name may be deleted and/or other users inserted. Click the Insert button to allow entry. You will be prompted for a User or External address.

Bcc: User
This field allows the email address of the intended “Blind Copy’ recipient to be entered. This name may be deleted and/or other users inserted. Click the Insert button to allow entry. You will be prompted for a User or External address.

Attachments
The ability to link attachments is an Authorised Function. Previously, although ad-hoc e-mail messages could be sent to users and external addressees from Workflow-enabled Pathway modules through the execution of tasks linked to the MAIL system action, these messages could not have associated user-defined attachments.

Enhancements have been made to the Workflow MAIL system action (as of Release 3.02) to allow for the selection of default file attachments of any type (such as .doc, .xls, .csv etc.) when defining parameters for a user action.

The previously existing *Insert* button is used to add filenames to a list in a new *Attachments* field group, much as *To*, *Cc* and *Bcc* addressees are added. When selected with the cursor in the new field group, the Insert button creates a slot for a filename to be specified. The pop-up button on the filename field can be selected to display the standard “Open File” dialog. Attachment filenames can also be “manually” edited, and can be deleted from the list using F11.

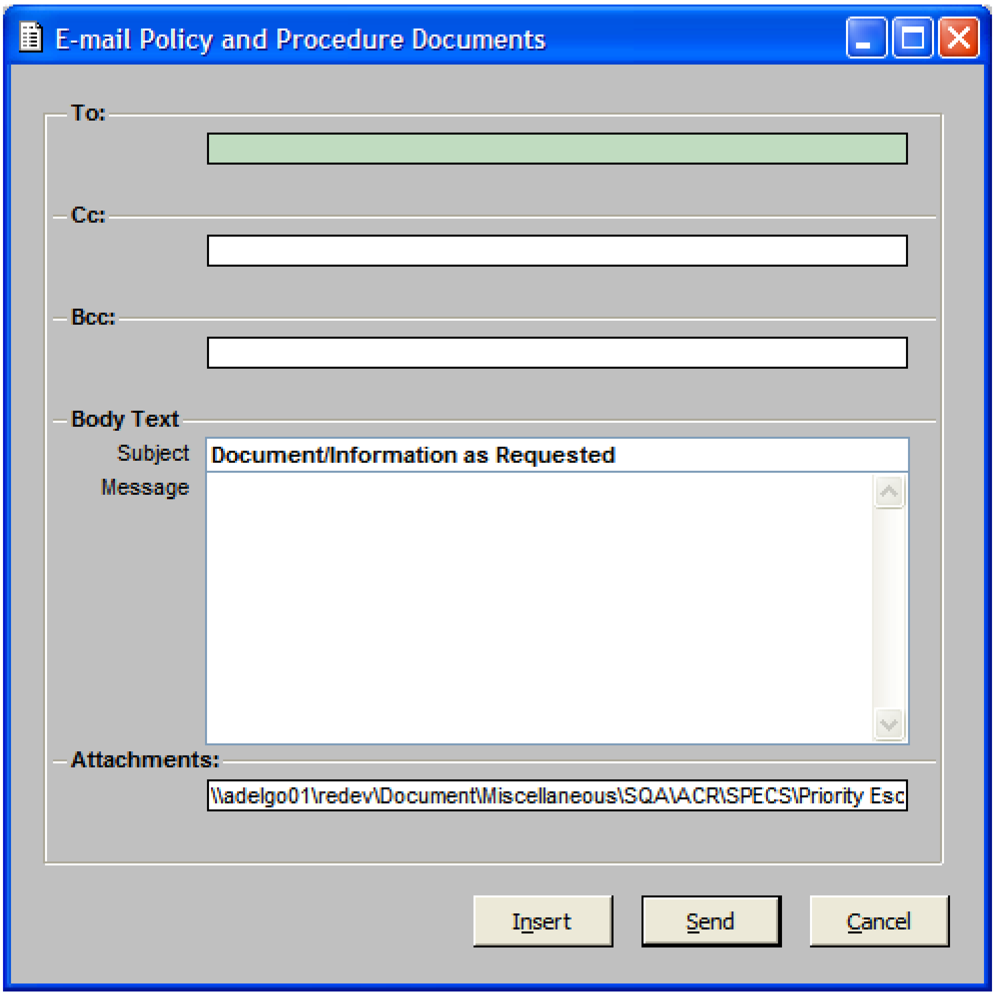
A new *Open* button allows attachments to be opened using the file associations defined in the Windows registry. When the Open button is selected, the current file in the Attachments list is opened within its associated Windows application.

Subject
This field displays the Subject of the email as was set up in parameters. This text may be modified.

Message
This field displays the Message of the email as was set up in parameters. This text may be modified.

Email Policy and Procedure Documents

The Email Policy and Procedure Documents form displays when the Email Button is selected on the Policy and Procedure Documents form. It allows details to be set up for emailing a document to a specified recipient.



Email Policy and Procedure Documents

To: User
This field displays the email address of the intended recipient which was set up in parameters. This name may be deleted and/or other users inserted. Click the Insert button to allow entry. You will be prompted for a User or External address.

Cc: User
This field displays the email address of the intended 'Copy to' recipient to be entered. . This name may be deleted and/or other users inserted. Click the Insert button to allow entry. You will be prompted for a User or External address.

Bcc: User
This field allows the email address of the intended "Blind Copy' recipient to be entered. This name may be deleted and/or other users inserted. Click the Insert button to allow entry. You will be prompted for a User or External address.

Subject
This field displays the Subject of the email as was set up in parameters. This text may be modified.

Message
This field displays the Message of the email as was set up in parameters. This text may be modified.

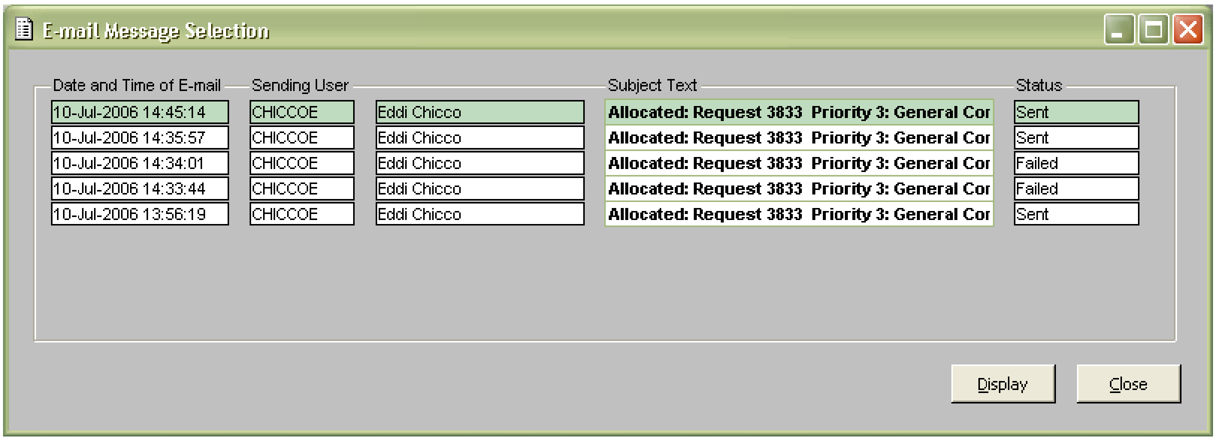
Attachments
The Attachments field is used to store the path pertaining to the attachment when an Internal System WP Document or an External WP Document is emailed.

Email History

The E-mail History function enables e-mails which are sent by applications to be automatically logged by Pathway. At present, the only application able to do this is Customer Service (ACR). E-Mails generated by Customer Service or by Workflow for Customer Service Requests will be logged and keyed by the Application Key (in this case, Request). This function is switched on and off at the system parameter level within Customer Service.

Email Log Selection form

The Email History option is available from the Options Pull-down Menu from Customer Service Request Maintenance/Enquiry. This option allows users to view the e-mail history for each Customer Service Request. The information which is available includes the Pathway user who caused the e-mail to be sent, the Subject text, the Date and Time of the e-mail, and a flag indicating if the MAPI interface call to send the e-mail was successful.



E-mail Log Selection Form

Date and time of E-mail
This field displays the Date and Time the E-Mail was actually sent by the background processor.

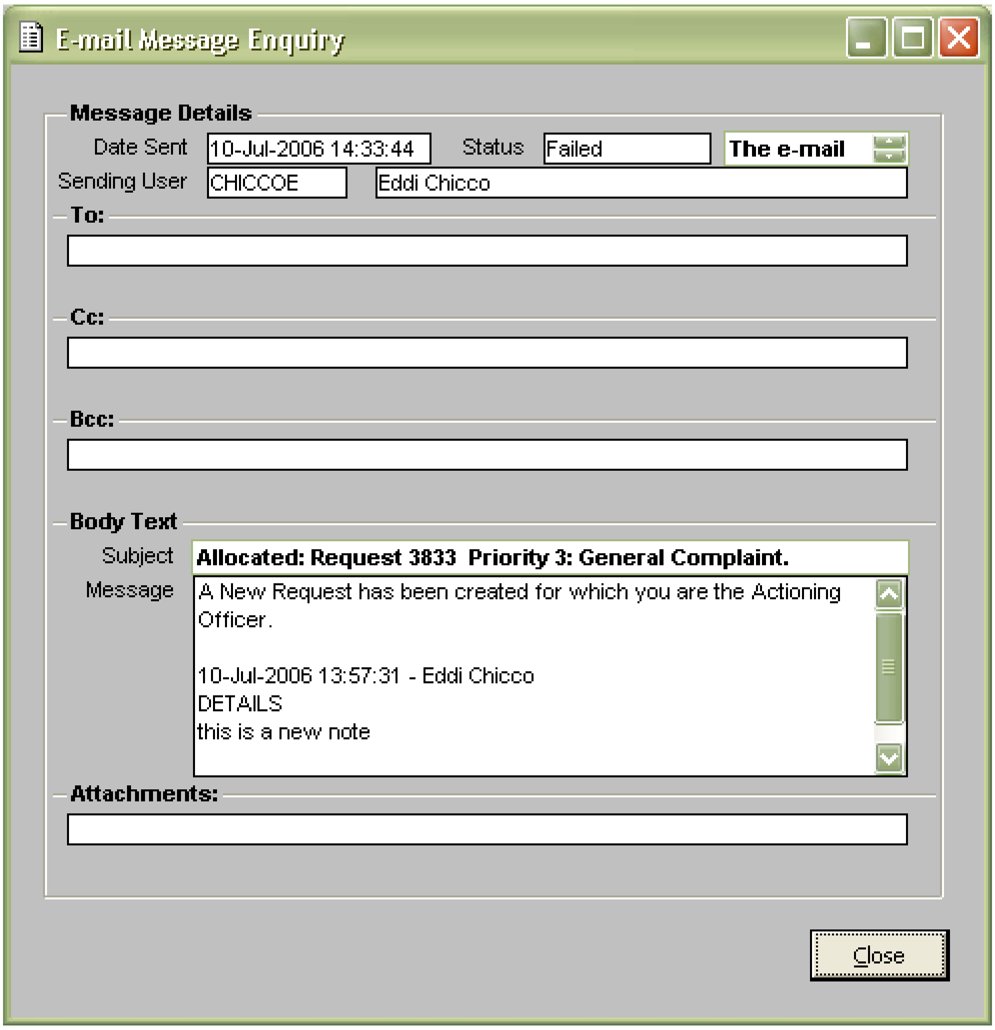
Sending User
These fields displays the UserID and Description of the User who caused the e-mail to be sent (Note that this will usually differ from the 'From' e-mail address on the e-mail itself.)

Subject Text
This field displays the Subject text of the e-mail.

Status
This field indicates whether the e-mail was sent or failed.

Email Log Enquiry Form

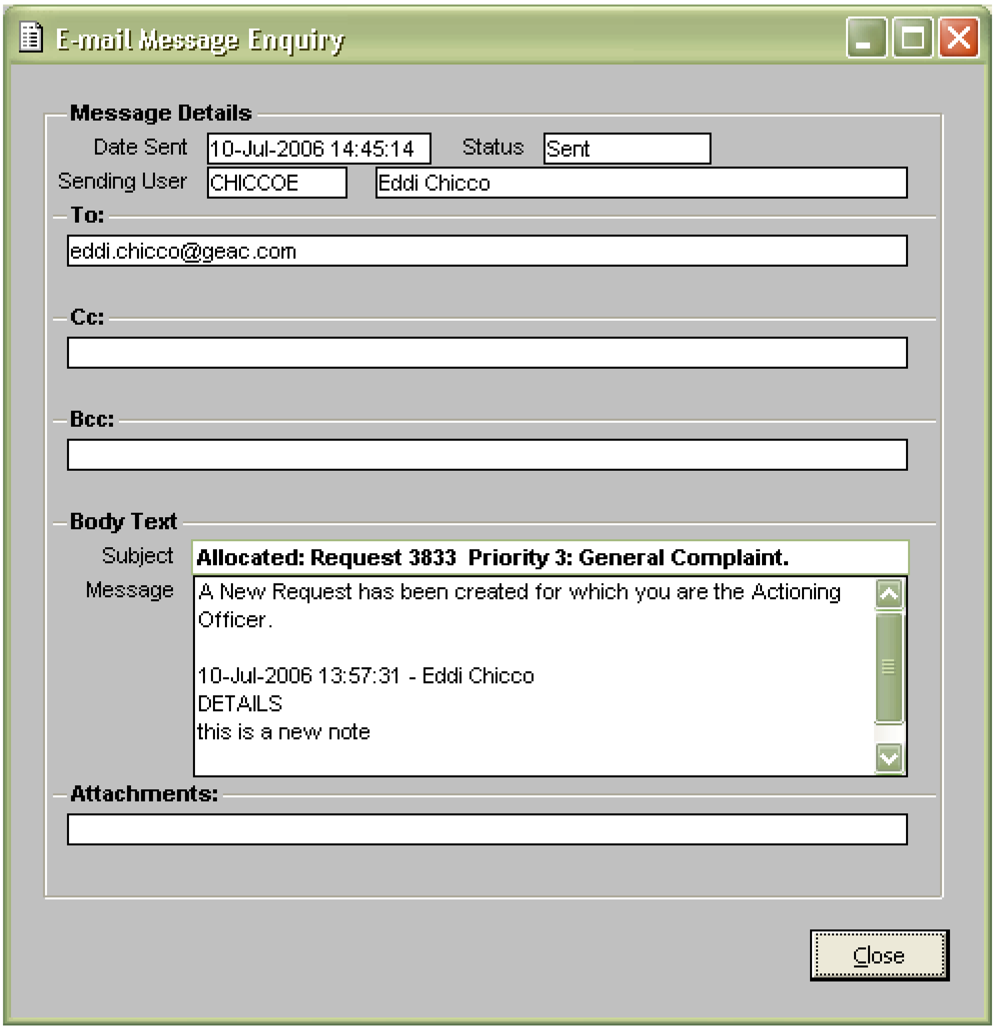
The Email Log Enquiry form displays when a selection is made from the Email Log Selection form, or directly from the Options/Email History option if only one email exists for a Request.
The details of the email are displayed, including the originating user, the Date and Time the email was sent, all recipients of the email, the message text and a list of any attachments included in the email.



E-mail Log Enquiry Form

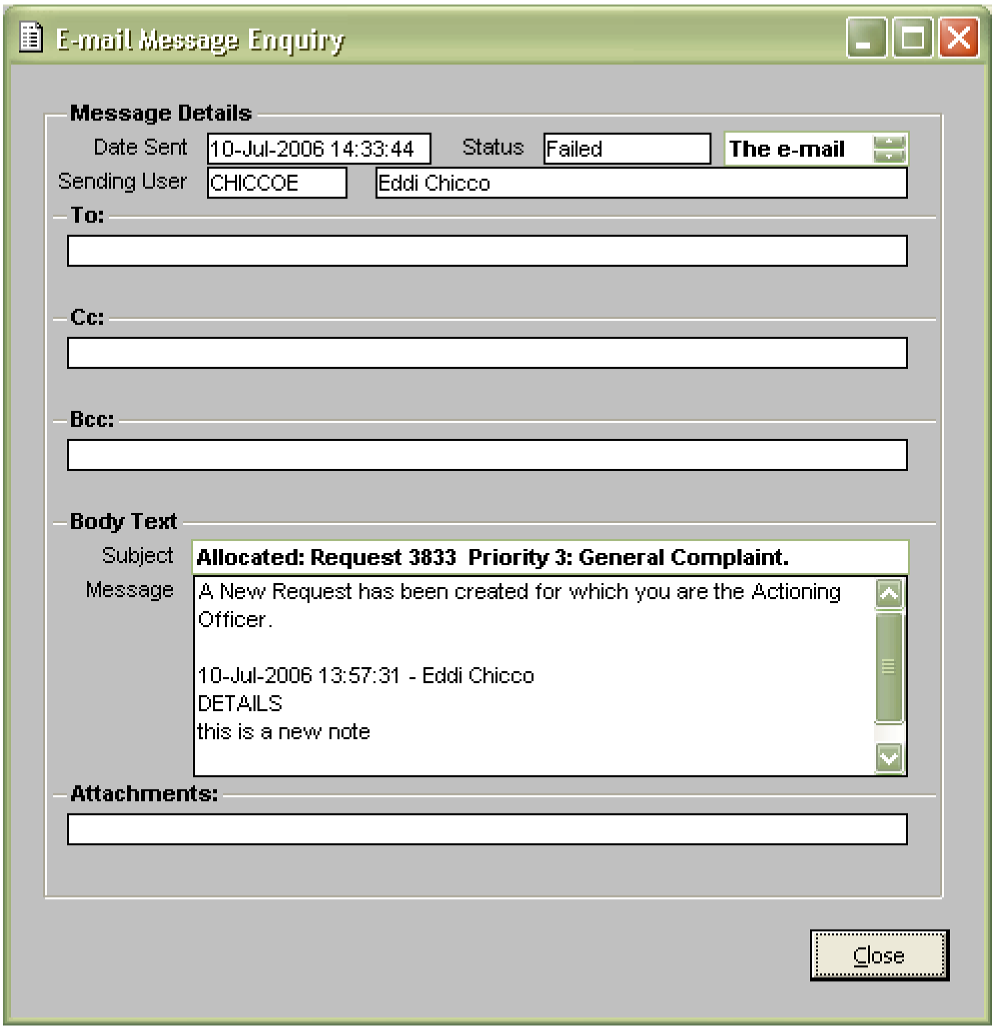
Date Sent
This field displays the date and time at which the email was sent.

Status
This field displays the Status of the E-mail. This will be either Sent or Failed. See example below.

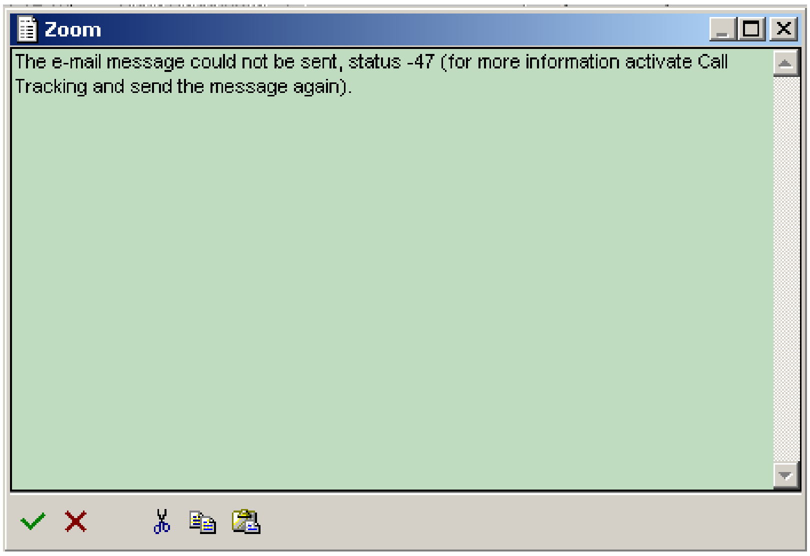


E-mail Message Enquiry showing error code field.

In the case of a failure to send an email, the error message field will display alongside the Status field. See example below.



Double-clicking this field allows the error text associated with the failure to be more fully viewed



Error Code field after zooming

Sending User

These fields display the User details of the person who sent the email.

To:

This field displays the addressee of the email.

Cc:
This field displays the ‘Carbon Copy’ details of the email

Bcc:
This field displays the ‘Blind Carbon Copy’ details of the email.

Body Text – Subject
This field displays the subject of the email. This text is system generated dependant on the type of email.

Body Text – Message
This field displays the message details as entered by the sender of the email.

Attachments
This field displays the path to any attachments included in the email. An example of this is when a Policy and Procedure Document is emailed to a customer and is attached to a Customer Request. Note that the attachments are only links to the original attached objects, not the objects themselves.

Creating a Pathway Shortcut

The executable Pathway.exe can be used to start a Pathway session. Pathway.exe is located in the "msc" subfolder of each Pathway 2.15 and later environment. Simply create a shortcut to Pathway.exe.

Starting a Pathway Session

PATHWAY.EXE
Previously it was possible to start a Pathway session using a shortcut with properties similar to the following:

Target:\\MyServer\MyShare\Uniface\7206\W2K\bin\uniface.exe/ini=.\7206\SetW2K.ini/asn=.\7206\Set.asn CSY
Start in:\\MyServer\MyShare\Pathway\Prod

This continues to be supported.

However, a simpler, easier approach based on the new executable Pathway.exe can also be used to start a Pathway session. Pathway.exe is located in the "msc" subfolder of each Pathway 2.15 and later environments.

Simply create a shortcut to Pathway.exe, for example, by right-clicking Pathway.exe in the desired environment and selecting "Send To >> Desktop (create shortcut)". Double-click the new shortcut to start a Pathway session.

When creating a shortcut to Pathway.exe there is no need to specify any command line parameters and the "Start in" folder can be left at its default value. For example, an actual shortcut for Pathway in Production may have the following properties:

Target: \\MyServer\MyShare\Pathway\Prod\msc\Pathway.exe
Start in: \\MyServer\MyShare\Pathway\Prod\msc

HOW PATHWAY.EXE WORKS
Pathway.exe will automatically determine the required information to start a Pathway session. It determines this based on the "Start in" folder of the shortcut. It will search this folder and its parent folders for the Pathway SetL.asn and SetP.asn configuration files. Having located these files it is then in possession of enough information to initiate a Pathway session.

If the "Start in" folder is not available (for example, if Pathway.exe file is simply double-clicked, rather than a shortcut) then the folder in which Pathway.exe is located and its parent folders will instead be searched for the required SetL.asn and SetP.asn configuration files.

Note that Pathway.exe uses the "UnifaceDirectory=" line in the SetL.asn file to locate Uniface and also uses the current operating system to determine whether SetW95.ini, SetNT4.ini or SetW2K.ini is required.

If this process fails, and enough information cannot be determined to start a Pathway session then a simple menu of known Pathway environments will be displayed. If there are no known environments then the menu will not be displayed. The list of known environments is located under the following registry key:

HKEY_CURRENT_USER\Software\Infor\Pathway

This registry key is automatically created or updated each time a Pathway session is started, provided that the current user has appropriate authority to this registry key. Note that this registry information is also used by the Pathway COM functionality and so should not typically be manually modified.

CREATION OF MS-SQL SERVER ODBC DATASOURCES
For SQL Server sites that use a direct ODBC connection to the database (rather than Polyserver) Pathway.exe will also automatically ensure that the correct ODBC datasource exists. If the ODBC datasource does not exist it will be automatically created, and if it has incorrect settings then it will be automatically corrected. This can only be performed if the "DatabaseServer=" line in the SetL.asn file contains the name of the database server. For example,

DatabaseServer=MyDatabaseServer

or, if SQL Server named instances are in use,

DatabaseServer=MyDatabaseServer\MyInstance

Reference is also made to the $UD1 line in the Pathway SetP.asn file in order to determine the required datasource name.

Note that the ODBC datasource will not be automatically created or corrected if access to the Windows registry is denied. If access to read, update or write the registry is denied then this step will be silently skipped and the datasource will not be automatically created or corrected (however the Pathway session will still be started, assuming that the ODBC datasource actually does exist and is correct).

To automatically create or correct the ODBC datasource the following access to registry keys and values is required:

HKEY_LOCAL_MACHINE\Software\ODBC\ODBC.INI\<datasource name>
(read/create this key, read/update/create values under this key)

HKEY_LOCAL_MACHINE\Software\ODBC\ODBC.INI\ODBC Data Sources
(read/update/create values under this key)

HKEY_LOCAL_MACHINE\Software\ODBC\ODBCINST.INI\SQL Server
(read values under this key)

HKEY_LOCAL_MACHINE\Software\Microsoft\MSSQLServer\Client\ConnectTo
(read/update/create values under this key)

HKEY_LOCAL_MACHINE\Software\Microsoft\MSSQLServer\Client\TDS
(read/update/create values under this key)

where <datasource name> is the ODBC datasource name, for example, "pthprod".

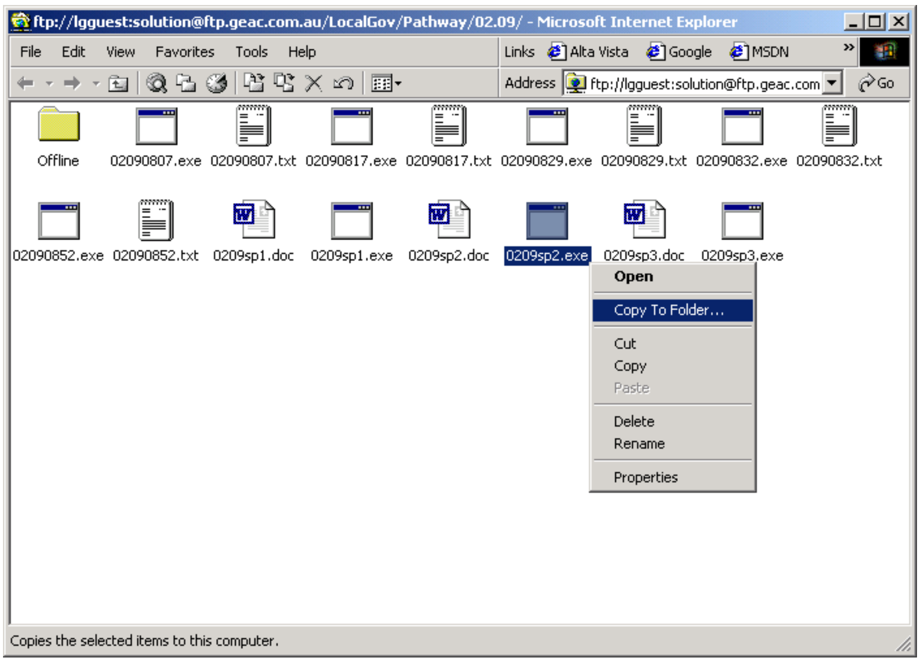
Downloading a Service Pack

The following instructions should be performed to download the service pack from the Internet.

1. Access the Infor ftp site by typing the following into the Address field of Internet Explorer or the Location field of Netscape and press Enter (note that 203.32.189.50 can be used in place of ftp.Infor.com.au):

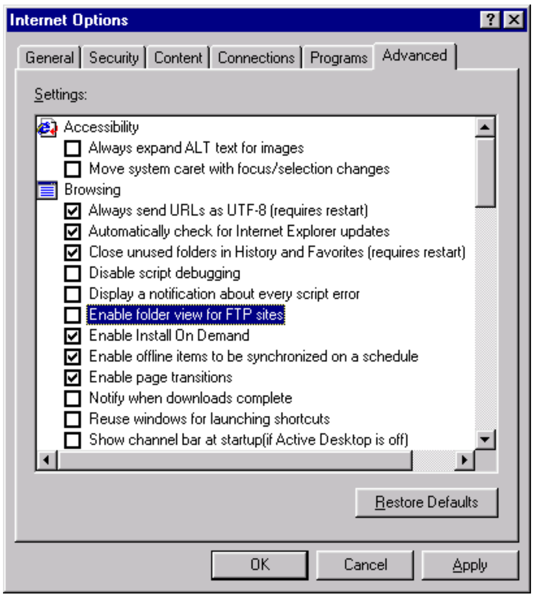
   ftp://lgguest:solution@ftp.Infor.com.au

2. If this is successful a “LocalGov” folder and a “Pub” folder should be visible.
3. Open the “LocalGov” folder.
4. Within this, open the “Pathway” folder.
5. Within this, open the appropriate release level folder, for example the “02.09” folder.
6. Right-click the required service pack (for example, 0209sp2.exe) and then select the “Copy To Folder…” option to save the service pack into a temporary directory (in Netscape select the option “Save Link As…”).



Note that if you are using Internet Explorer and encounter an error similar to the following:

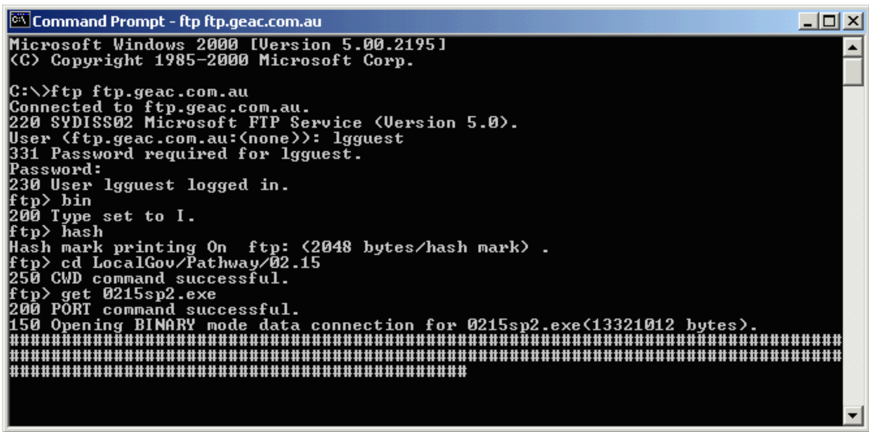
then open the "Tools >> Internet Options…" pull-down menu option, click on the "Advanced" tab and untick the "Enable folder view for FTP sites" checkbox (note that this may be termed "Web folders" or similar in earlier versions of Internet Explorer).



Close down all Internet Explorer sessions and then try downloading the service pack again. If this does not resolve the problem and you are using an older version of Internet Explorer then try using Internet Explorer 5.01 or later.

If this fails then click the 

button and select "Run…". Type in "cmd" and press enter. At the command prompt type in "ftp ftp.Infor.com.au" and press enter. Type in the user "lgguest" and password "solution". Type in "bin" and press enter. Type in "hash" and press enter. Then type in "cd LocalGov/Pathway/02.15" and press enter (changing "02.15" to the appropriate release). Now download the service pack by typing in, for example, "get 0215sp2.exe" and pressing enter.



Infomart Fix Installation

Several changes have been introduced to Infomart as of Pathway 2.16 that will enable sites to easily install, rebuild and manage Infomart using Pathway menu options.

The following instructions must be performed once for each fix that includes Infomart changes. If these instructions are not performed then the Infomart fix will not take effect. As always, you should refer to the Readme.txt file supplied with each fix for any other special instructions relating to the fix.

Note: The same machine requirements that apply to the installation of Infomart in the first instance also apply to the installation of an Infomart fix. As such, all sites should make themselves familiar with the contents of the Infomart Release 2.16 Installation Guide distributed as part of bulletin board topic number 280609 on August 2nd 2004 with particular emphasis placed on the section of the document titled “Pre-Installation Requirements”.

Instructions

Each Infomart fix includes a single Infomart Deployment file which contains the updated Infomart SQL scripts in an encrypted format. For example, the file may be called I02161234.cim. The data in the file must be imported into Pathway. It can then be used to automatically make the necessary database changes to Infomart.

1. Log on to Pathway as SCASYS.

2. Open the following menu option:

   System Administration >> Infomart >> Installation >> Import Deployment File

3. Enter the path to the *.cim file that was supplied with the fix. Note that the *.cim file will only be available after the service pack has been applied (navigate to the “fix” folder of the given Pathway environment, find the appropriate fix number subfolder and then open the *.cim file that should exist in the “new” subfolder). For example:

   \\MyServer\Pathway\Prod\fix\02161234\new\I02161234.cim

4. Click the Process button.

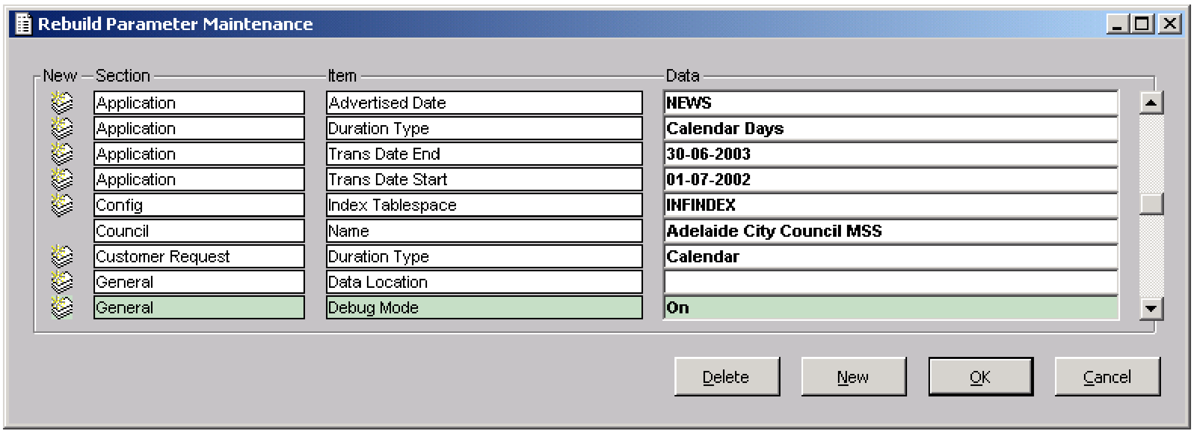
5. Click OK when the Processing Options Maintenance form appears. This will import the Infomart Deployment file into Pathway (several Notepad or Word documents may then automatically open up – they are not needed and can be closed).

6. Open the following menu option:

   System Administration >> Infomart >> Parameters >> Infomart Parameter Maintenance

7. Ensure that the Infomart parameters are correctly set for your environment. Note that this form allows parameter values to be viewed and altered before they are installed in the Infomart database. The icons on the left hand side of this form indicate that a parameter is new (as of the current fix) and that you have not yet modified the parameter from its default value.

   Note: Not all parameter values need to be modified and not all fixes will introduce new parameters.



The next step is to install the changes introduced by the fix to your Infomart database (i.e. steps 8, 9 and 10 below). This may include automatically creating new tables, changing existing tables, creating new stored procedures and changing existing stored procedures.

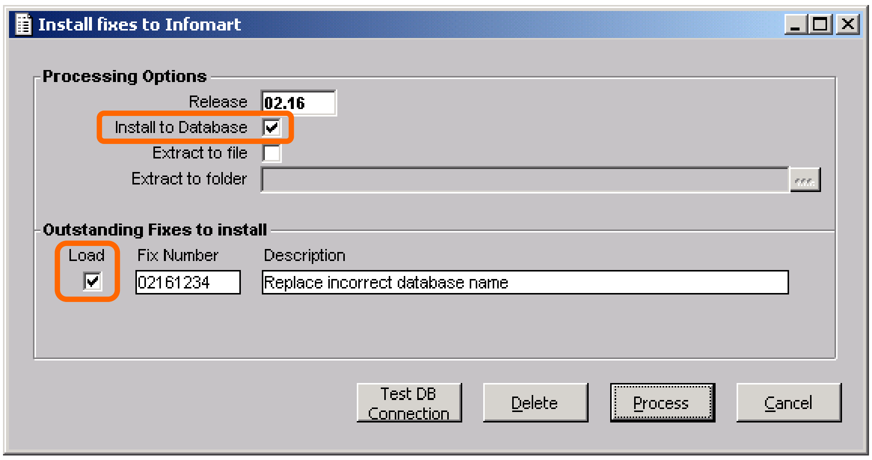
This will be performed using the "Install Infomart Scripts" menu option. It will automatically generate, tailor (based on settings in the Infomart "System Parameters" menu option) and then run the SQL scripts that will make the necessary alterations to Infomart database. Alternatively you may save the tailored SQL scripts to a file location of your choice for later execution.

Warning: Whilst running the "Install Infomart Scripts" process in the following steps any other applications running on the PC will be unavailable. The duration of each install will vary depending on the change being implemented.

8. Open the following menu option:

   System Administration >> Infomart >> Installation >> Install Infomart Scripts

9. Ensure that the "Install to Database" checkbox is ticked and that the "Load" checkbox is ticked beside the fix that you want to install. Optionally tick the "Extract to file" checkbox to save the Infomart scripts to a separate file for later reference.



Note that the bottom half of this form will display all fixes for which an import from an Infomart Deployment file has been performed (see step 3 earlier). The fix number will correspond to the

*.cim filename. In other words, in the above example screen shot, fix number 02161234 would have been imported from an Infomart Deployment file with a filename of I02161234.cim.

10. Click the Process button. The Infomart database changes for the fix will be performed.

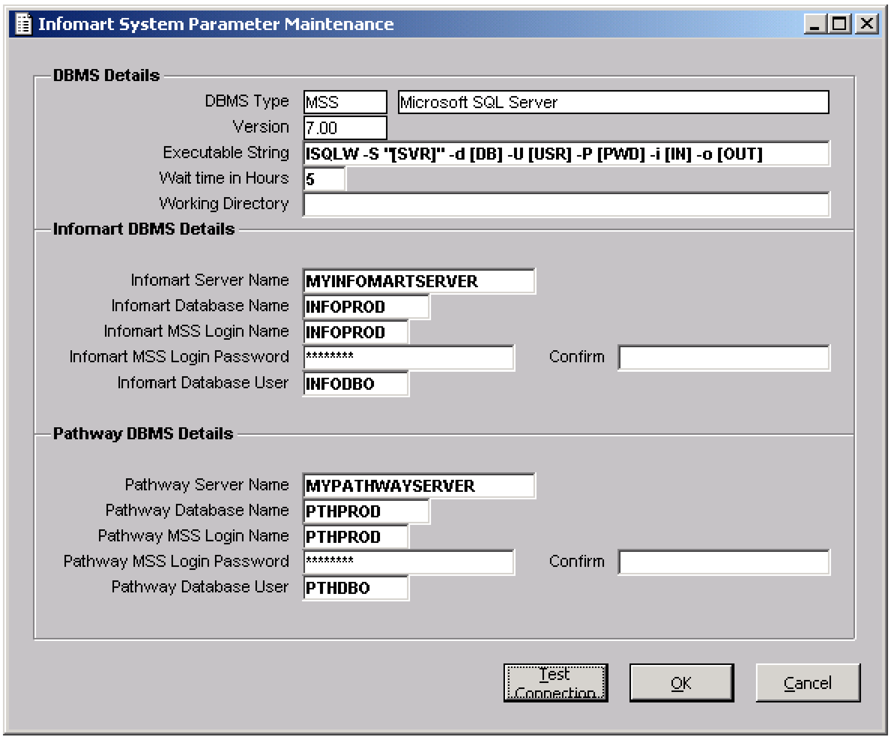
This completes the Infomart fix install instructions. See the next section for troubleshooting.

Troubleshooting

If there are any problems then open the following menu option.

System Administration >> Infomart >> Parameters >> System Parameters

Ensure that the parameters such as the database names and logins are correct. Click the "Test Connection" button to test the connection to the Pathway and Infomart databases.



Check the Pathway message frame for any error messages (use the View >> Message Frame pull-down menu option). The "Install Infomart Scripts" menu option may also produce log files on the root of the C: drive that provide more information about any problem.

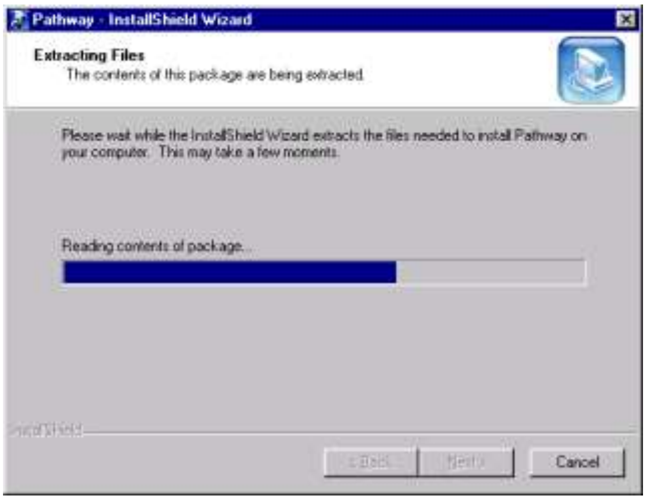
Applying a Service Pack

1. Ensure that no one is logged on to the environment that will have the service pack applied (in particular, it is recommended that you manually check that the **uobj.dol** and **W32COM.dll** files are not locked). Ensure that the **Batch Processor** and any **ePathway services** have been stopped.

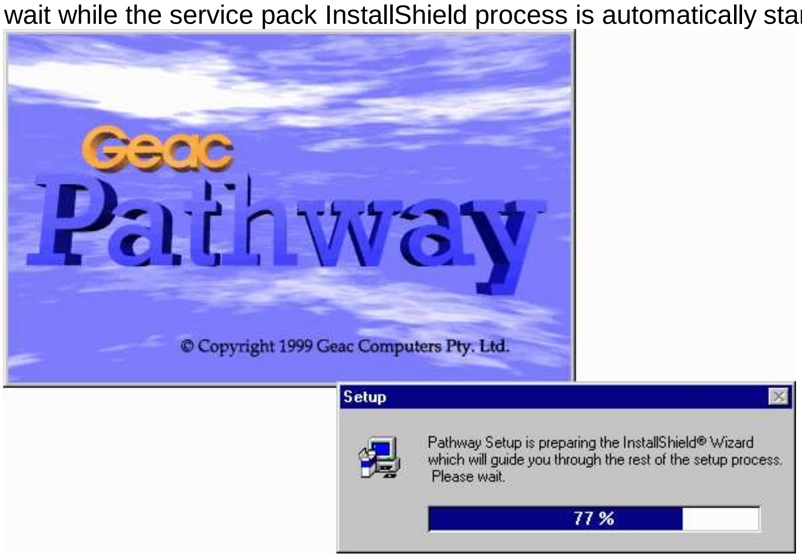
   Note, if ePathway is installed, it will be necessary to go into the Control Panel on that ePathway Application server, stop the **ePathway services** and then run “iisreset.exe” from a command line. After the service pack is installed, the **ePathway services** will need to be restarted using the Control Panel.

2. Log on to a PC that has authority to update the directory structure of the environment that will have the service pack applied.

3. Double click on the service pack executable file, for example “0203sp1.exe”. The following window should appear briefly.



4. And then wait while the service pack InstallShield process is automatically started.



5. Ensure that the “**Apply the patch**” task is selected (this is the default). Click “Next >”.

6. Enter the path of the environment to which you wish to apply the service pack. For example, to apply the service pack to a Training environment installed on the E: drive you may need to enter a path of “E:\Software\Pathway\Train”. Click “Next >”.

7. A window summarising your selections should appear. Verify that all the information is correct before continuing. Click “Next >” to begin the application of the service pack.

8. The files constituting the service pack will be copied into the “fix” subdirectory of the environment you have specified. A log of all actions taken will be written to **C:\Patch.log**.

9. The fixes that constitute the service pack will be applied.

10. If the service pack has been successfully applied then the following should appear. Click “Finish”.

This completes the automated portion of the service pack installation.

Note: All special instructions as indicated on the first page must now be performed manually.

Omitting Special Instructions

Note: The following should be performed with caution. Check with your IT Manager before proceeding.

It is now possible to apply a fix or service pack without performing the special instructions.

Any fixes or service packs created as of today will present this new option.

It can be used to apply a fix or service pack to a replicated file structure (for example, on a redundant file server or a remote site PC).

This is useful because it reduces the need for sites to manually copy the entire Pathway folder structure each time a fix or service pack is applied.

Service Pack Documentation

The following changes have been made to the Service Pack Document:

- The following format for Readme.txt file headers is now supported:

  Fix: 02192692
  Module: LPA
  DRN: 16773
  Author: MBone
  Date: 09-Sep-2005
  Case: 1586314, Caboolture, CSC-21127
  Case: 1586316, Adelaide, A-5388Z

- Additional lines have been included for "Module" and "Case" (AnswerLink case number, customer name and Reference Number).

- The lines are also in a different order to cater for customer preferences.

- More information is provided in the Fix Tables including:
  - DRN number
  - Entity Changes

- Page references
- Case Numbers/Customer Name/Reference Number