ePathway User Guide

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Pathway 3.09 (Thick Client Version)

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EPATHWAY USER GUIDE

System Parameters

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Service Request Maintenance
Contact Maintenance
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User Field Types Maintenance

Web User Maintenance

Web User Maintenance Form

This form provides an option to search for a Web User. The user can be one who is currently registered in both ePathway and Pathway, Pathway only or ePathway only.

User Search Profile form

Select Using Initial Registration Details
If this checkbox is checked on, then a search based on the 'Select Using Initial Registration Details' will be performed. This checkbox is automatically checked on when selecting this menu option.

By using the checkbox 'Select Using Customer Profile Details' checkbox a search for either a Customer or a Company Representative can be entered.

Registered in ePathway
When using the 'Select Using Initial Registration Details' the user can define the search to cover just those who are registered in ePathway, those not yet registered in ePathway or search over all entries.

User Name
This is the name the External User has chosen to be known by in ePathway. The standard Pathway wildcard search function is available.

Surname
This is the Surname of the person registered to be able to use ePathway. The standard Pathway wildcard search function is available.

Given Names

This is the Given Names of the Person registered to be able to use ePathway – this field would normally be used in conjunction with the Surname. The standard Pathway wildcard search function is available.

Company Names

This is the Name of the Company that is linked to a person/s who is/are able to use ePathway. The standard Pathway wildcard search function is available.

Email Address

This is the email address of the person who registered a request to be able to use ePathway Applications and/or Certificates. The standard Pathway wildcard search function is available.

Activation Status

Use the drop down list to filter user registration records that are part way through, or have completed the Activation Process.

Customer Registration Type

Use the drop down list to filter user registration records by type. AUTOUSER, EXTUSER, NEWUSER.

Select Using Customer Profile Details

If this checkbox is checked on, then a search based on Customer Profile Details will be performed.

Role Type

This Drop Down selection allows the user to determine which Role Type is to be selected. The choices are Customer or Customer Representative.

Customer – Select the name of the individual person or Company who is a registered user of ePathway.

Company Representative – Select the name of the Company Representative who is linked to the Customer.
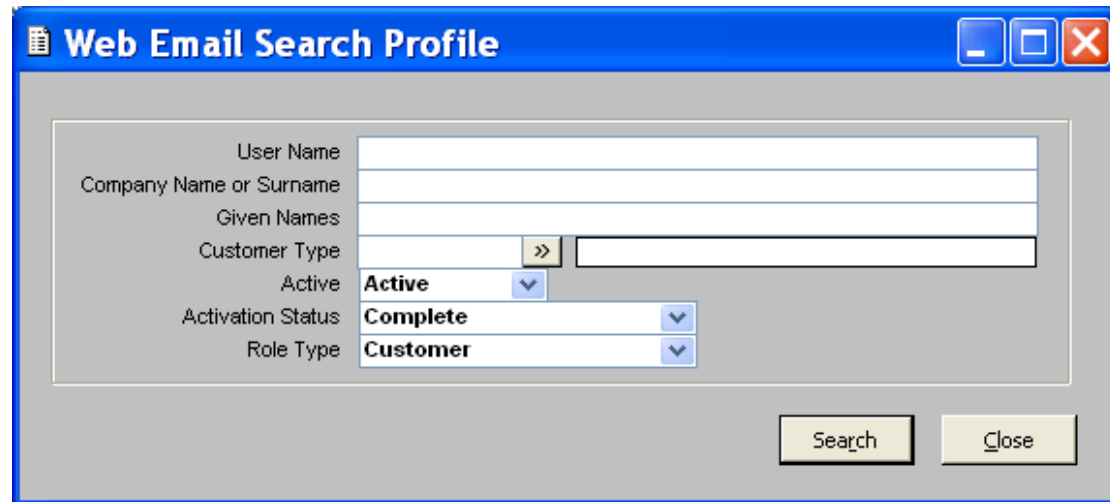
Company Name or Surname

Enter the relevant name details, the standard Pathway wildcard search function is available.

Given Names

If the selection is for a customer an additional search of Given Names is able to be utilised. The standard Pathway wildcard search function is available.

Web Email Search Profile

This form allows for the sending of an email to registered users allowing the selection via several means.

Web Email Search Profile

User Name
Search for a specific User(s) using their name as the search profile – normal wild card searching applies here.

Company Name or Surname
Search for a specific User(s) Surname or Company name as the search profile – normal wild card searching applies here.

Given Names
This field is used in addition to the Surname field to search for a specific User(s) Surname as the search profile – normal wild card searching applies here.

Customer Type
Enter in the Customer Type or select a specific Customer Type using the Drop Down list to search for all Users of a specific Customer Type.

Active
The user is able to search for Active, Inactive or Both Active and Inactive Users.
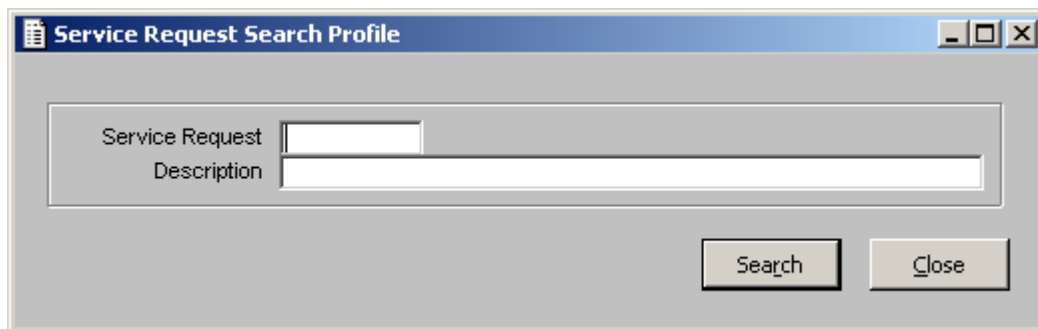
Activation Status
This field enables the user to search for ePathway Users by status, the relevant statuses are Incomplete, Declined, Complete, Exceeded Activation Attempts, Document Generated and Expired.

Role Type
This field allows the user to search for Company User or the Company's Representative.

Service Request Maintenance

Service Request Search Profile Form

Service Request Search Profile Form
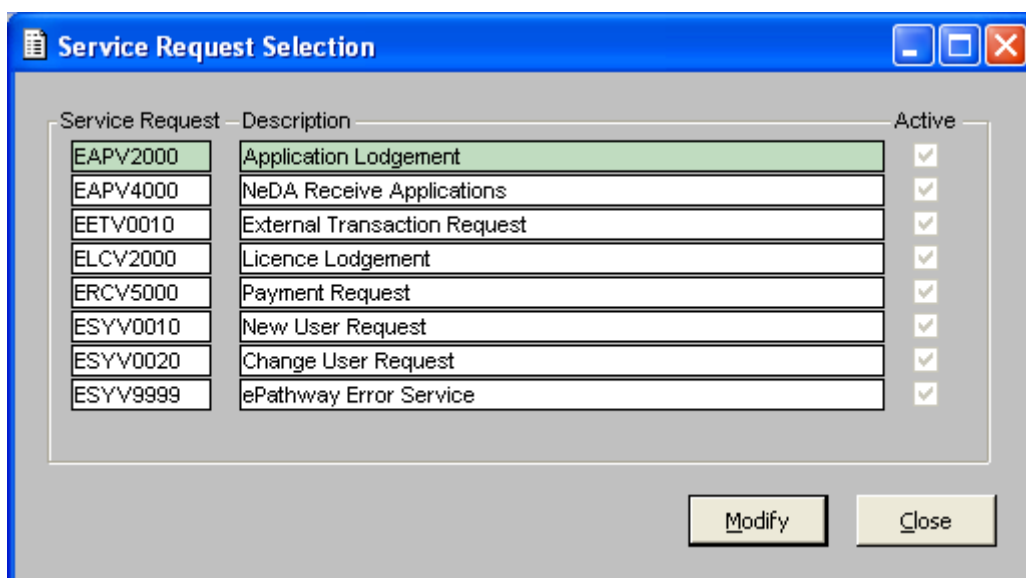
Service Request/Description

Service Requests are non-modifiable codes that are used internally by the system to alert the relevant person of some action that has taken place. The code may not be maintained, however it is possible however to amend the description although this is not recommended.

Service Request Selection Form

This form lists the different Service Requests that can be used to notify a corporate user when a certain action or process has been performed.

For example :

When an Application is lodged via ePathway, you can determine whether either just an email is sent to the user or if a Customer Request is also created.

Service Request Selection Form

Service Request/Description

Service Requests are non-modifiable codes that are used internally by the system to alert the relevant person of some action that has taken place. The code may not be maintained, however it is possible however to amend the description although this is not recommended.

Active Indicator

Those Service Requests that have the active tick against them are able to be used within the system.

A service Request is modified by the user either highlighting the relevant Service Request and selecting Modify or by double clicking on the required Request.

Service Request Maintenance Form

This form allows you to setup the message text and the system defaults for each Service Request.

Note: If a Service Request record is created at the ePathway module 'type' level and its Recipient (rather than the Service Request record itself) is removed, no email will be sent following an ePathway transaction. That is, the system level Recipient (for the ePathway module) only acts as an override in the absence of the Service Request record. This flexibility enables councils the ability to not send internal emails at the module 'type' level."

Service Request Maintenance Form

Service Request

This screen shows the various Service Request that are available within ePathway with their email messages and who is to receive them.

Email Message Entity

This message is sent to the relevant person who is designated to manage the various requests.

Active Indicator
If the Active Indicator is on the Service Request is available for use.

Subject
Subject text may be entered for the email.

Email Message
The body of the email message may be altered if desired, however the removal of the standard variable is not recommended.

This email message is sent to the designated recipient listed below.

Recipient
If Council is not using the standard Pathway Customer Service Module then a designated user is able to be entered here as the email recipient. By detailing out on this field, a user may be selected from all registered Pathway Users.

> Note: If a Service Request record is created at the ePathway module 'type' level and its Recipient (rather than the Service Request record itself) is removed, no email will be sent following an ePathway transaction. That is, the system level Recipient (for the ePathway module) only acts as an override in the absence of the Service Request record. This flexibility enables councils the ability to not send internal emails at the module 'type' level."

Options – Customer Service Request Type Maintenance
Select this button if Council is using the standard Pathway Customer Service Module – it will lead the user to enter the standard Customer Request details which are sent out as a default.

Customer Service Request Type Maintenance Form

This form allows you to set the defaults for the Customer Request when it is created by the Service Request.

Customer Service Request Type Maintenance Form

Service Request

Indicates the function that will initiate the creation of a Customer Request. In the example above, a Customer Request will be created when a new Application is lodged via ePathway.

Request Type Code

Use the popup to select the Request Type that will be created by this service.

Requestor Type Code

Use the popup to select the Requestor Type that will assigned to the Request Type created by this service.

Contact Type Code

Use the popup to select the Contact Type that will assigned to the Request Type created by this service.

Actioning Officer

Use the popup to select the Actioning Officer that will assigned to the Request Type created by this service.

Receiving Officer

Use the popup to select the Receiving Officer that will assigned to the Request Type created by this service.
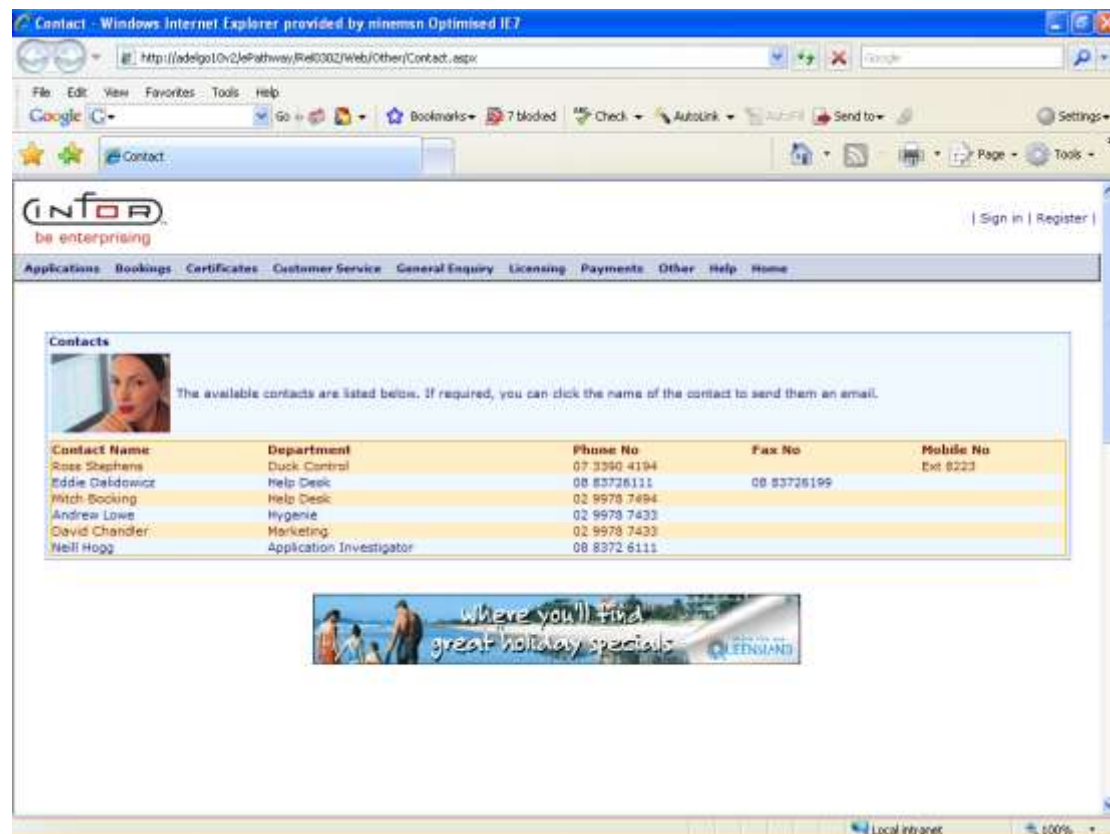
Responsible Officer

Use the popup to select the Responsible Officer that will assigned to the Request Type created by this service.

Contact Maintenance

Contact Maintenance Form

This allows for the creation and export of Council Contacts for various council departments.
They are available for enquiry via the Contact Us option under the Other Menu tree.

The web user simply needs to select one of the contacts and they will be automatically taken to their selected email program.

Enter the details that are to be displayed on the web site. If a new contact is required, press the Insert button and enter the relevant information.

Reminder: If any changes or additions are made, remember to export the data to ePathway.

Once exported, the information is immediately available to users of the web site.

Contact Maintenance Form

Department

Enter in a description of the Department that will appear on the ePathway Contact Us Web Page.

Name

Enter in the Name of the Contact that will appear on the ePathway Contact Us Web Page

Communication fields

Enter in the Communication Details that will appear on the ePathway Contact Us Web Page

User Field Maintenance

User Fields Maintenance Form

This form lists the fields that may be assigned via the Customer Type Maintenance option. All fields are set to Active as a system default. Therefore all fields are exported to ePathway for possible inclusion on the relevant web page.

User Fields Maintenance Form

XML Tag Name/Description
System Defined.

XML Tag Type
System Defined.

Max. Size
System Defined.

Entity
System Defined.

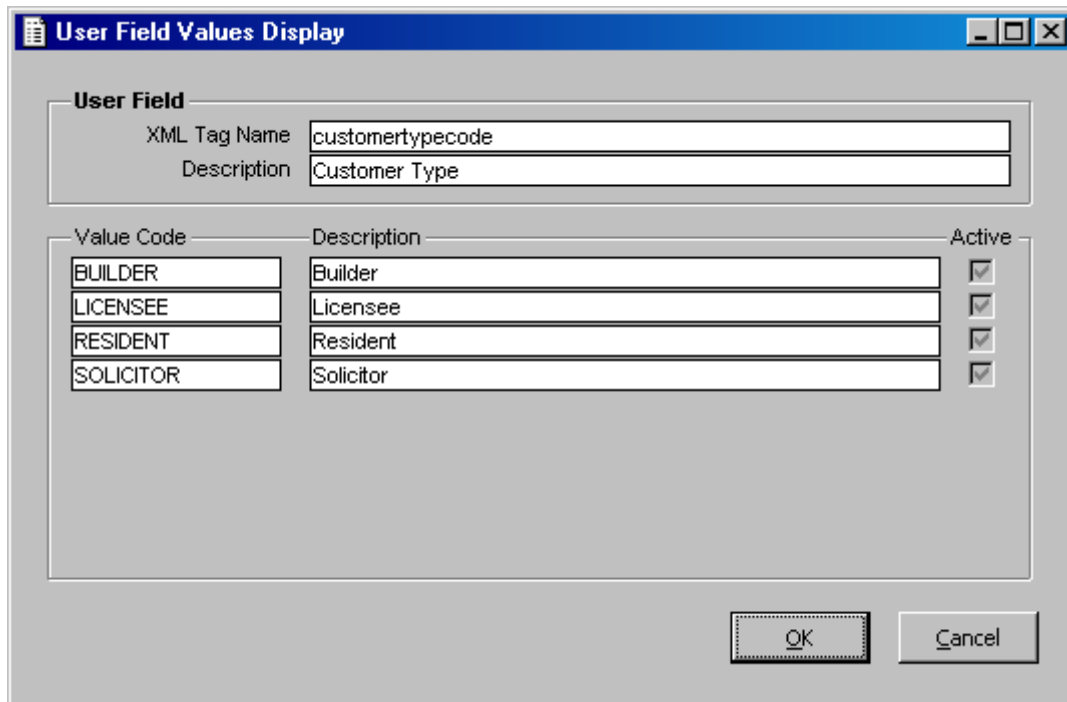**List Form**
System Defined.

Active Indicator
System Defined.

Values button
It is possible to assign user defined Name and Address - Communication and Information data elements to appear on the web page. This is achieved by selecting the popup button next to the XML field. You will be prompted to select, clear or cancel your selection.

User Field Values Display Form

This screen displays the list of Codes and Descriptions for the data type associate with a List of Values. The list of values is automatically extracted from the related Pathway module.

User Field Values Display Form

User Field – XML Tag Name/Description

Value Code/Description

Active Indicator

User Field Types Maintenance

User Function Type Maintenance Form

This form lists the different types of User Registration, Maintenance and Enquiry functions that can be performed via ePathway.

User Registration Field Types Maintenance Form

Function Type/Description

This is the list of user Registration function utilised by ePathway.
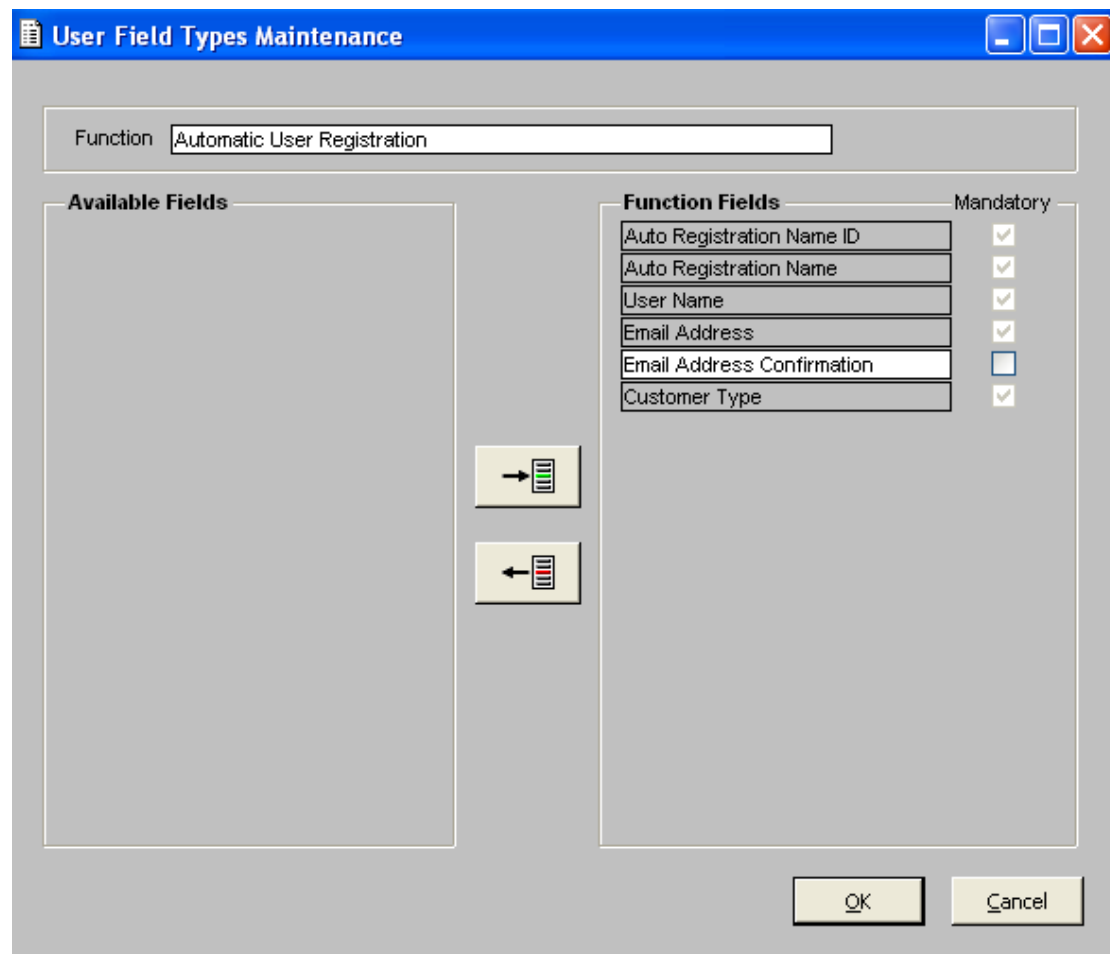
AUTOUSER – allows you to define the fields that will be used by the My Accounts automatic user creation process.

AUTO REGISTRATION ENHANCEMENTS

Previously, ePathway Automatic User Registration only allowed for a user to retain the User Registration Identifier (i.e. the Pathway Name TPK number) as their username. Furthermore, all users who registered via this method had their Customer Type set according to a Pathway configuration that applied to all Auto Registrations.

An enhancement has now been made so that a user must now nominate a User Name and a Customer Type during Auto Registration.

Pathway -> System Administration -> ePathway -> System Parameters -> User Field Types Maintenance – AUTOUSER fields (button)

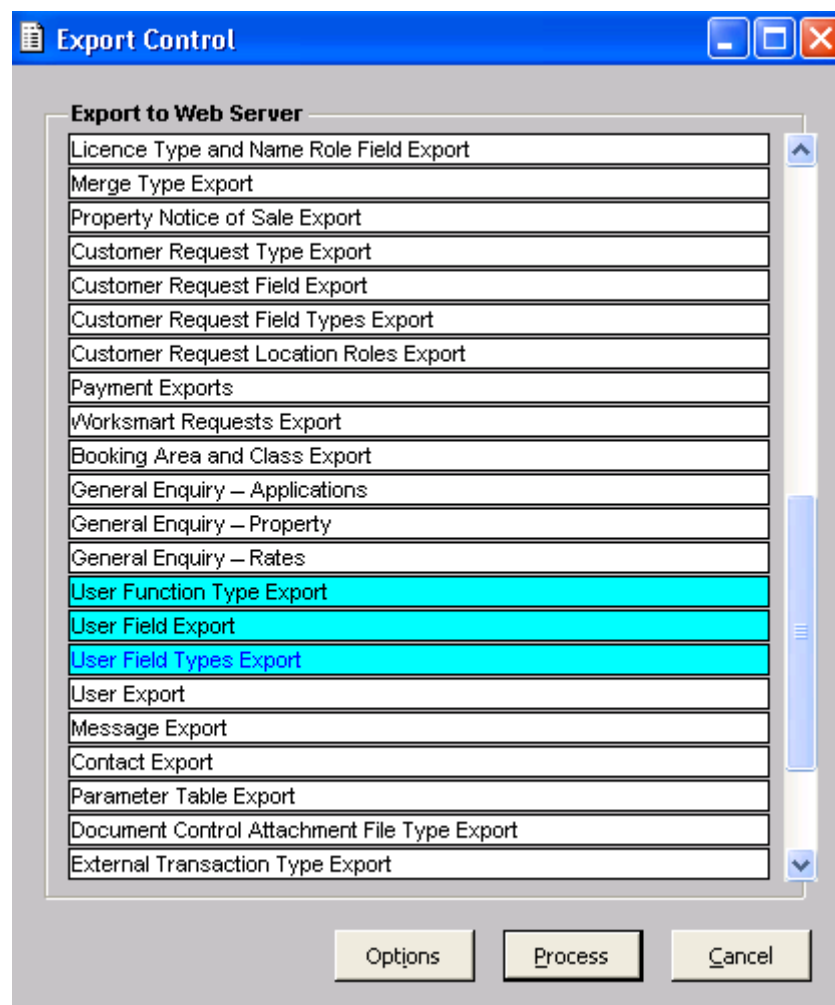These 2 new Function Fields will now be available for Auto Registration (see above).

Once an ePathway 'User Field Types' Export is run, the 2 new fields will be apparent in ePathway. For example,

Note: it is recommended that the 'User Function Type Export', 'User Field Export' and 'User Field Types Export' are all run simultaneously as per the example above.

The ePathway Administrator will now have these fields available in ePathway for Automatic User Registration page setup. See below:

These 2 new 'mandatory' fields will now be required for ALL Auto Registrations. Depending on the Page Layout setup, the pages will appear (during registration) something like the following: Note: User may auto register by clicking on the hyperlink at the bottom of the Sign In page (which is accessible via MyAccounts).

Sign in

If you are a registered user please enter your sign in details below.
Alternatively you may click the available link to register yourself for this service.

User Name: Admin

Password:

Sign in

Want to register right now using the details on your council notice ? Click here

Forgotten your password ?

Step 1 of 4: Automated Registration

Automated Registration

Please enter the details as requested below so that we can authenticate you (this information can be found on any recent council rates, water or renewal notice etc).
Once successfully authenticated, you will be allowed to proceed with the registration process.

Notice Details

Auto Registration Name Id * 52769763

* Denotes that the field is mandatory.

Continue

Step 2 of 4: Auto Registration Details

Auto Registration Details

Email Confirm

Auto Registration Name *	SUSAN PAGE
Email Address *	nick.gabb@infor.com
User Name *	SUSANPAGE
Customer Type *	Rate Payer

* Denotes that the field is mandatory.

Continue

As a result of the above registration, a new user will be created in Pathway as follows:

Note: The User Name reflects the one defined within ePathway and the Customer Type also reflects the Customer Type nominated in ePathway.

CHANGEUSER – allows you to define the fields that will be presented to the registered web user. Any changes made via the web page will be attached to the Web Users record and accessible via Web User Maintenance. A notification email will be sent to a nominated Pathway User when any changes are submitted.

EXTUSER – allows you to define the fields that will be presented on the External User creation page. Please note that this functionality is only being used by Auckland City Council and is an Authorised function.

LOGINHELP – allows you to defined the fields that customer must complete to successful allow for their password to be changed. All submitted data is compared against their existing Web User data.

NEWUSER – allows you to define the fields that will be presented to the customer when the Registration process is selected from ePathway.

USERENQ -   allows you to define the fields that will be presented to the registered web user, when the User Enquiry option is selected via ePathway.

Active Indicator

This field can only be set off for the AUTOUSER function. All other User Registration functions are Mandatory.

Fields
Select this option to allocate the fields that will be exported to and display on the relevant web page.

Activation Required
Set this option 'On' if it is a requirement for the user to Activate their Registration record.

Note: This functionality is only available for the EXTUSER and NEWUSER Registration functions.

Activation Expiry Days
This allows you to set the number of days the customer has to Activate their User Registration record. This field will only appear if the Activation Required flag is set on. If the customer does not activate the user registration within the number of days, their user registration record will be cancelled.
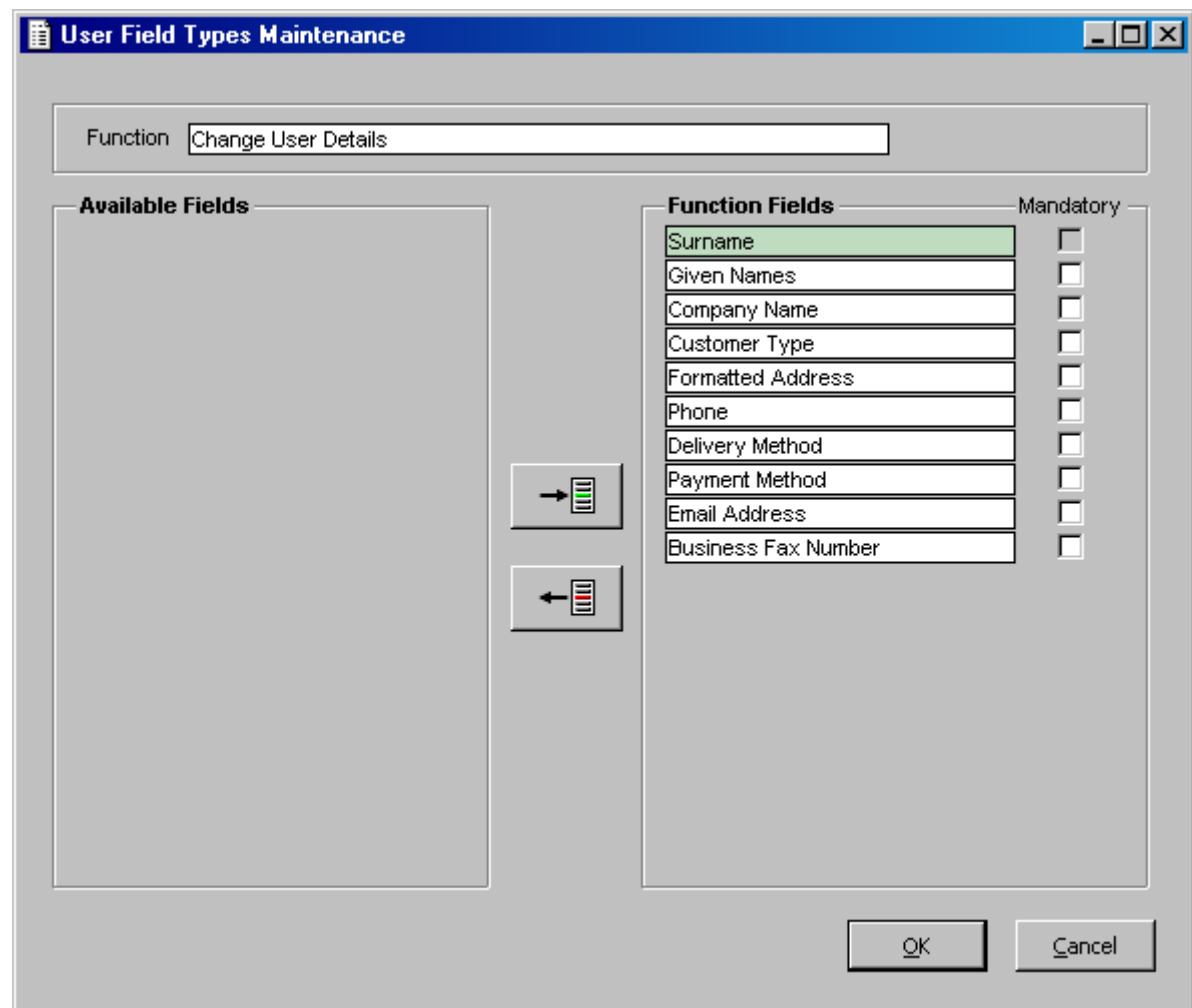
Activation Attempts
This allows you to set the number of attempts the customer has to Activate their User Registration record. This field will only appear if the Activation Required flag is set on. If the customer exceeds the number of attempts (that is, entering the Activation Code incorrectly) their user registration record will be cancelled.

User Field Types Maintenance Form

This form allows you to select the required fields for each User Function. The example below is for the Change User Details screen on ePathway. All the fields that have been assigned as Function Fields, will be displayed when the ePathway customer requests changes to the User Registration Record.

User Field Types Maintenance Form

Function
The description of the User Registration function selected.

Available Fields
Lists the fields that can be selected for export and inclusion on the relevant ePathway User Registration screen. Use the Select / Remove buttons to assign the fields that will be exported to ePathway.

Function Fields
Lists the fields that have been selected for export and inclusion on the relevant ePathway User Registration screen. Use the Select / Remove buttons to assign the fields that will be exported to ePathway.

Mandatory Indicator
Set this field 'On' if you require the customer to always enter details for this field. If this option is not set 'On' the displayed field will be optional.

System Processing

The following topics are covered in this section:

Message Audit Enquiry
Message Audit Purge
Web User Email
Web Server Export
Unprocessed Requests Enquiry
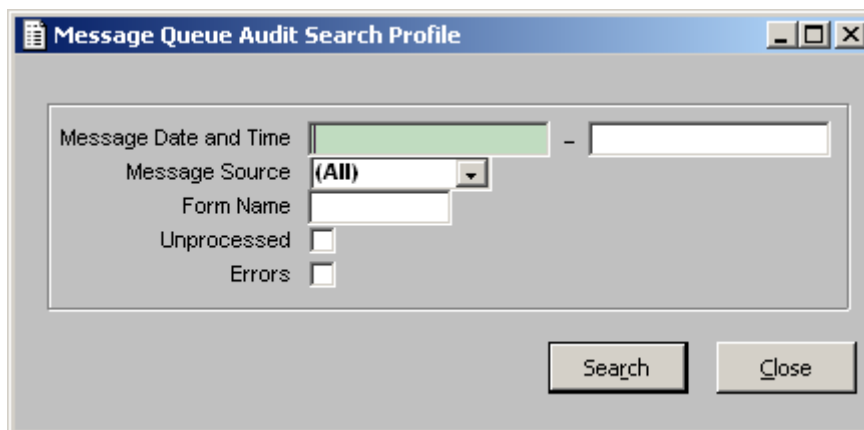
Message Audit Enquiry

Message Queue Audit Search Profile Form

This function allows you to view the system messages that have been either sent by Pathway or ePathway as part of daily processing.

Message Queue Audit search profile Form

Message Date and Time
Allows you to select message entries for a particular date / time range.

Message Source
Allows you to select whether the source of the message was Pathway or ePathway.

Form Name
Allows you to select message entries for a particular form.

Unprocessed
Allows you to select message entries that have not been processed.

Errors
Allows you to select message entries for processing errors.

Message Queue Audit Selection Form

This form lists the messages that have been created by either Pathway or ePathway.

Message Queue Audit Selection Form

Message Date and Time
The date and time of the transaction.

Message Source
The source of the message, Pathway or ePathway.

Form Name
The Pathway form that was used for the message.

Document Type
The type of document (function) that initiated the message.
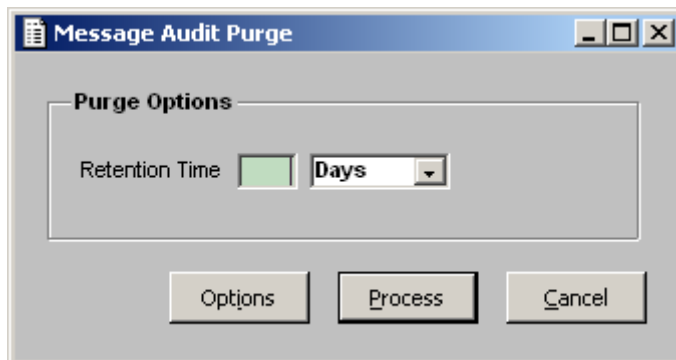
Error Description
The description of the error is applicable.

Message

Message Audit Purge

Message Audit Purge Form

This option allows you to purge Messages that have been processed between Pathway and ePathway. It is recommended that this process is run on a regular basis to conserve disk space.

Message Audit Purge Form
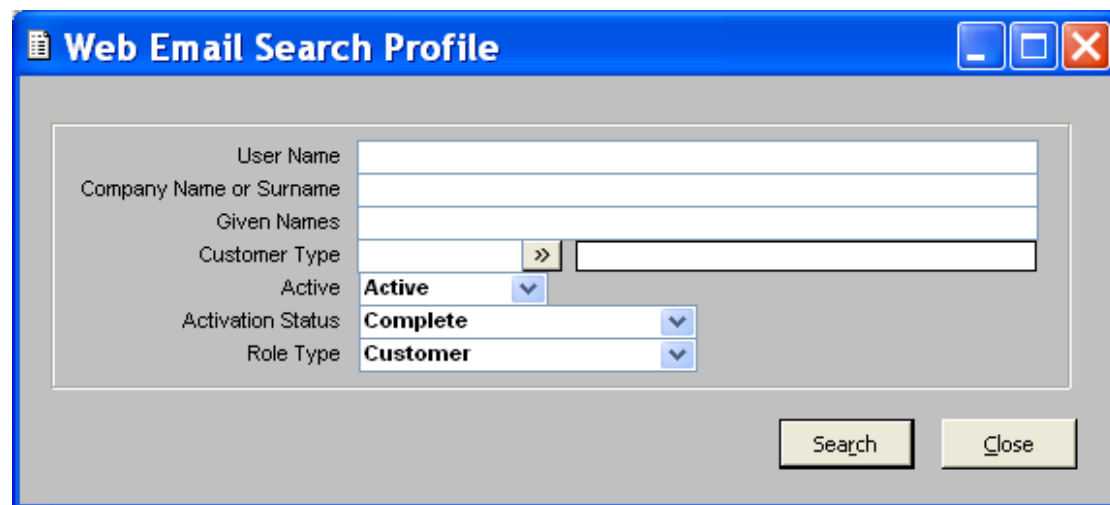
Purge Options – Retention Time

This function will delete Messages records that are older than the number of Days, Weeks or Months entered.

Web User Email

User Search Profile

This form allows you to search for Web User Registration records. The system will then return a list of records based on your selection criteria. An email with an attachment if required, can then be created and sent to the selected records.

Web email Search Profile

User Name
This is the name the External User has chosen to be known by in ePathway. The standard Pathway wildcard search function is available.

Company Name or Surname
This is the Surname of the person registered or the Company name to be able to use ePathway. The standard Pathway wildcard search function is available.

Given Names
This is the Given Names of the Person registered to be able to use ePathway – this field would normally be used in conjunction with the Surname. The standard Pathway wildcard search function is available.

Activation Status
Use the drop down list to filter user registration records that are part way through, or have completed the Activation Process.

Active
Use the drop down list to filter user status.
This Drop Down selection allows the user to determine which Role Type is to be selected. The choices are Customer or Customer Representative.

Customer – Select the name of the individual person or Company who is a registered user of ePathway.

Company Representative – Select the name of the Company Representative who is linked to the Customer.

ePathway User Maintenance

This form allows the user to select which of the Web Users they wish to send the email to. Those which were initially selected are listed under Available Web Users and those which are to receive the email are listed under Web Users to Receive Email.

ePathway User Maintenance

Customer Type
This is the Customer Type selected in the previous form.

Order By
This enables the user to display the select Web Users in Surname, Given Name order or in User Name order.

Selected Web User Name
This is the user name of one of the selected Web Users; this may be moved to the right hand side of the form to enable them to receive the email.

Selected Web User Formatted Name
This is the formatted name of the one of the selected Web Users; this may be moved to the right hand side of the form to enable them to receive the email.

Selected Web User Email Address
This displays the email address that will be used for the email message.

Selected Web User Name
This is the user name of one of the selected Web Users; this may be moved to the left hand side of the form to disable them from receiving the email.

Selected Web User Formatted Name
This is the formatted name of the one of the selected Web Users; this may be moved to the left hand side of the form to disable them from receiving the email.
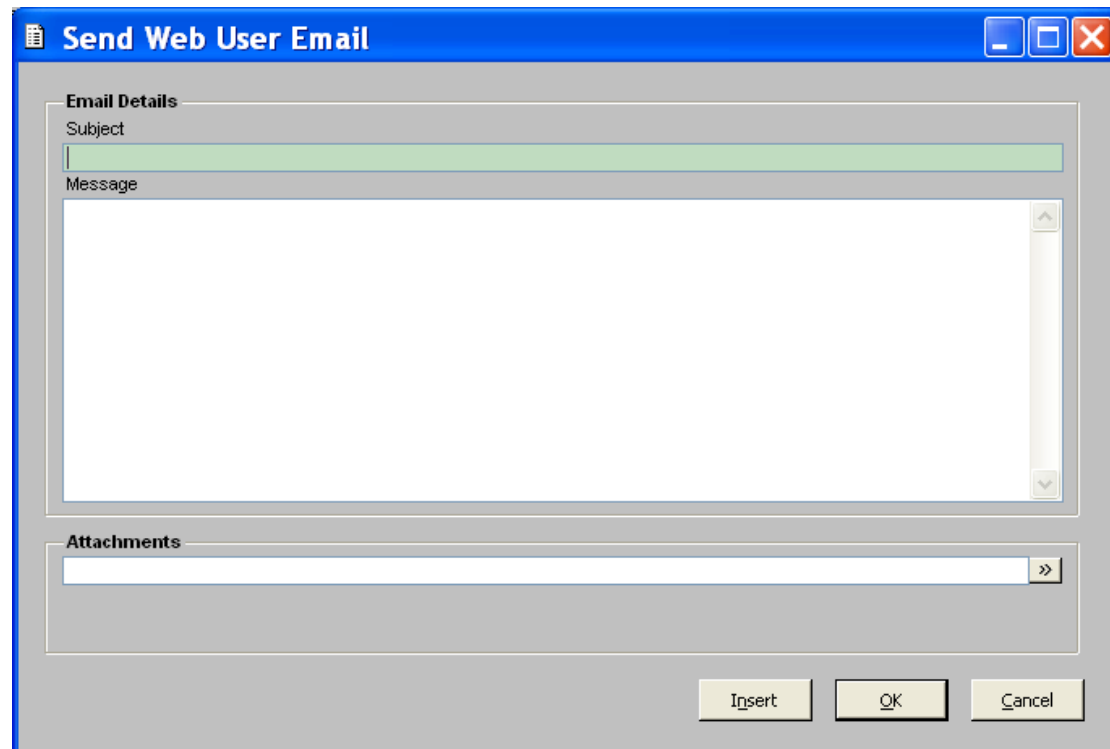
Selected Web User Email Address
This displays the email address that will be used for the email message.

Send Web User Email

This form is used to set up the email details that are to be sent to the Web User. There are 3 parts to the form, one for the Subject, one for the main message and one for the attachment if required.

Send Web User Email

Email Details – Subject
This is the Subject title of the Email to be sent to the Web Users.

Email Details – Message
This is the actual message that is to be sent to the Web Users.

Email – Attachments
The user is able to attach a file to the email, by detailing out the user can select from their nominated File Paths what attachment they wish to send to the Web User. Normal consideration should be taken of the type and size of the file.

User Selection Form

This form allows selecting of one or more ePathway users to who you want to send an email to. Use either the Shift or CTRL key to select one or many records, and then press the email button to display the email data entry screen.

User Selection Form

User Name
The User name created by the customer.

Registered
Indicates whether they are currently registered for ePathway use.

Customer
Name details from the associated Name and Address record.

Company Representative
Company details from the associated Name and Address record.

Active flag
Indicates whether the record is active.

eMail
To send an email, simply highlight the selected records and press the email button. You will now be presented with a screen that allows you to create the email content and send it as a BCC.

Web Server Export

Web Server Export Form

Whenever any parameters are entered or changed in Pathway, they will need to be exported to ePathway to allow them to be utilised on the web site. This is achieved by taking the following menu option.

Select the relevant parameters to be exported to ePathway and select the process button.

As the parameters have to be passed to the ePathway database through the Council's firewall to the DMZ Zone, there will be a delay between the exporting of the parameters from Pathway until they are available in ePathway. If the parameters are not changed in a reasonable time, please refer to the IT Department who will investigate the reason for the delay.

Web Server Export Form

Web Server Export for MSF Control

In order for the 'Disable MSF' parameters to be reflected in ePathway, an export must be run for each of the relevant Types/Classes. Specifically, where parameters have been updated, the following exports will need to be run in order to disable MSF for the appropriate types/classes:

- Application Type Export
- Licence Type Export
- Merge Type Export
- Payments Export
- Booking Area and Class Export
- Animal Registration Export
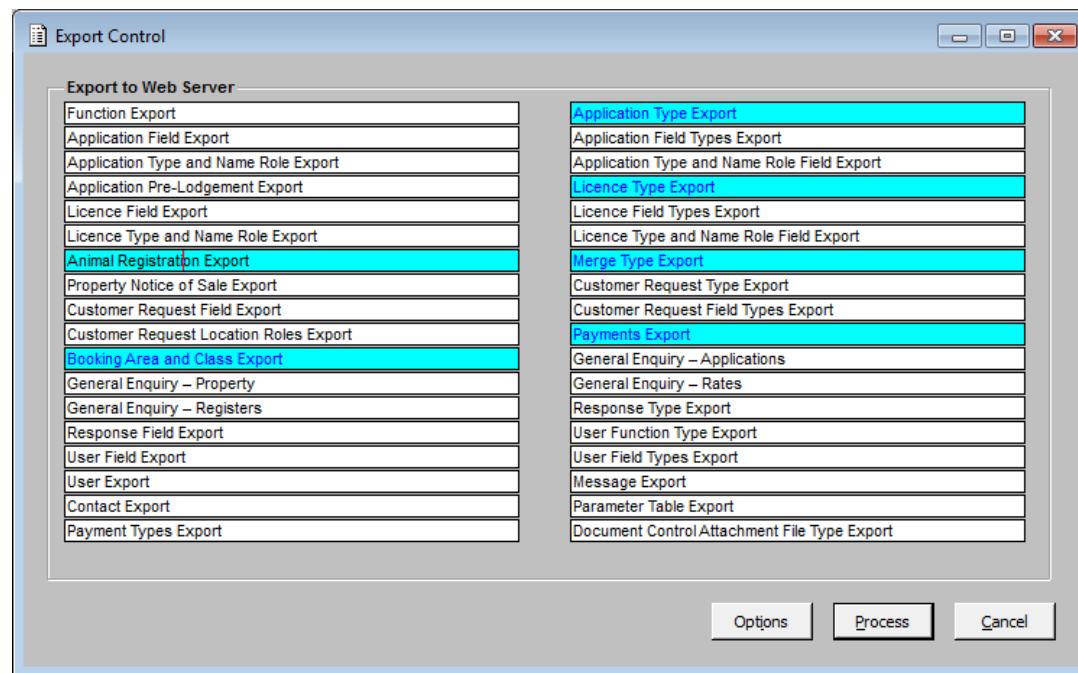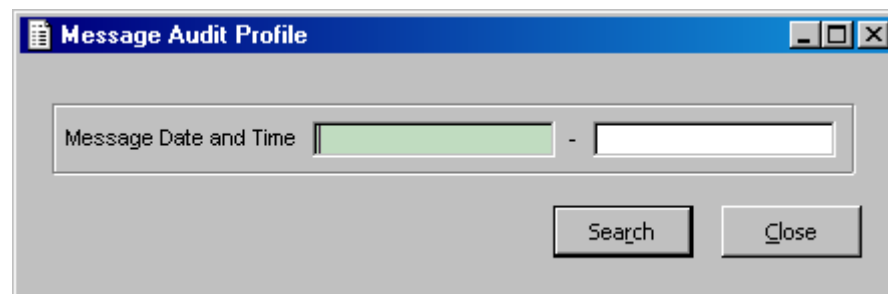
Export Control showing processes requiring selection

Unprocessed Requests Enquiry

Message Audit Profile Form

Click on Search to perform a search to display ALL available messages. Alternatively enter a Date range and click search to locate only the recent or relevant messages.
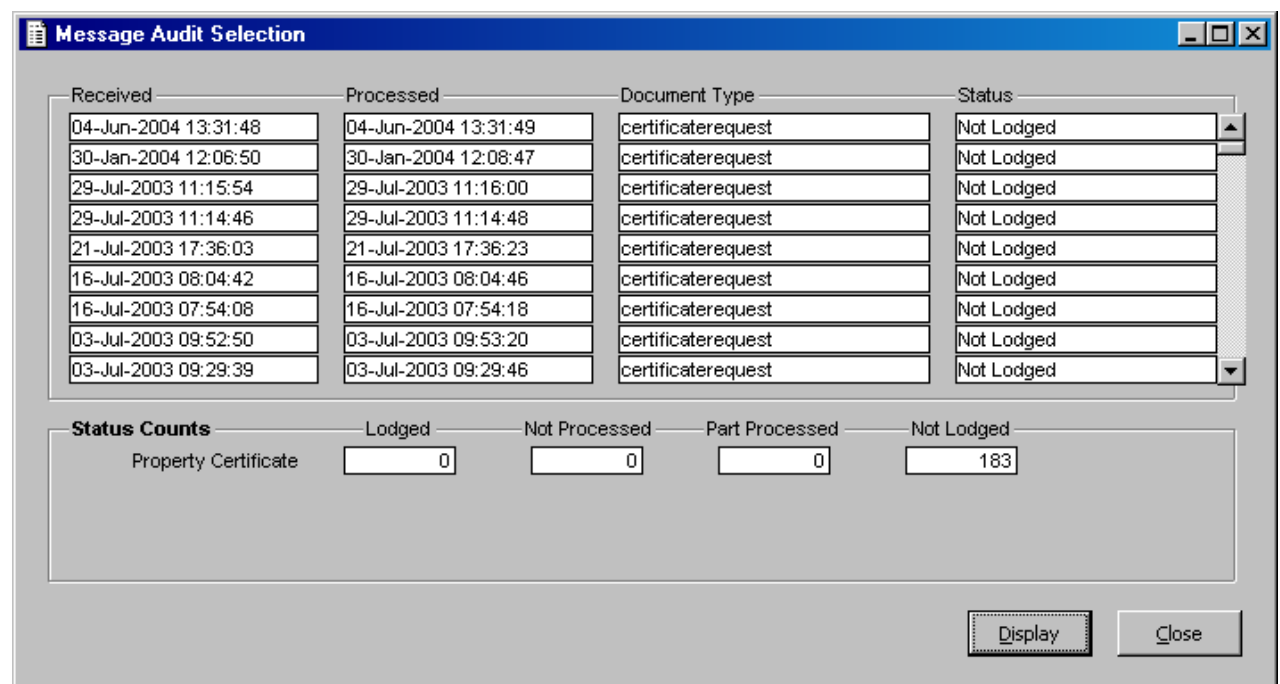
Message Audit Profile Form

Message Date and Time
Allows you to enter a date and time range to limit the number of records returned.

Message Audit Selection Form

The Message Audit Selection form will display all messages where a problem has occurred with processing the ePathway request. Highlight the required record and click on Display to see further details.

Message Audit Selection Form

Received
The date the request was received by Pathway

Processed
The date the request was processed by Pathway

Document Type
The type of XML document that was sent to Pathway.

Status
The current status of the Message.

Lodged - Not Processed
Lodged - Part Processed
Not Lodged
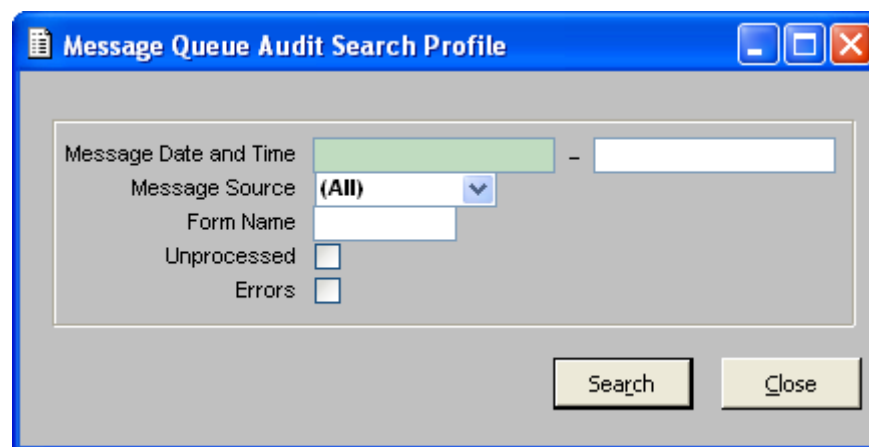
Status Counts - Property Certificate

Indicates the number of records at each status level.

Message Queue Audit Search Profile

This form allows you to search for processed, un-processed or error messages send by Pathway or ePathway.

Message Queue Audit Search Profile

Message Queue Audit Maintenance Form

Message Queue Audit Maintenance Form

Message Date and Time
The date and time the message was received.

Message Source
The source of the message – Pathway or ePathway

Form Name
The Pathway or ePathway form

Document Type
The type of transaction.

Document Id

Processed
The date and time the transaction was processed

Error Description
The description of the error if applicable.

XML Document
The complete XML document.

Application Lodgement Parameters

The following topics are covered in this section:

Lodgement Field Maintenance

This form lists all the fields that can possibly be exported and included on the ePathway Application Lodgement pages.

Lodgement Field Maintenance Form

XML Tag Name/Description
The internal XML Tag Name and Description.

XML Type
The field type assigned to the field.

Maximum Size
The maximum field length assigned.

Active Indicator
This field is system mandatory for some fields, but may be set to in-active here or at Application Class and Type levels. This allows for certain fields, for certain application types, to be excluded from the export process.

Options Detail Button
The options button allows you to link user defined data elements to certain fields.

Lodgement Field Mapping Maintenance Form

This form details the links between the ePathway XML tags and data elements in Pathway. It is used to direct data to fields that are user defined within Pathway. For example, ePathway generates a unique ID number for all records; this ID can be used to find the created record in Pathway. The ID number is placed into a nominated Reference Type within the module.

It is strongly recommended that each of the detail buttons are visited on the Lodgement Maintenance Field Form, to confirm that imported data for user defined fields are assigned correctly.

Lodgement Field Mapping Maintenance Form

Lodgement Field

This form allows you to assign difference Reference Types for different Application Class / Type combinations. When an application is lodged, the system generated ePathway ID number will be created for the Reference Type.

Load into Table

The Pathway Table that will receive the data.

Qualified by Table

The field within the table that will store the data.

Qualified by Field

The description of the field within the Pathway table.

Application Type

The list of Pathway Application types that have been identified for export and inclusion on the web pages.

Qualified by Row

The selected Reference Type assigned to the Application Type.

Name Role Field Maintenance

Name Role Selection Form

This form lists the Applications Name roles that can possibly be included on the ePathway Application Lodgement web pages.

To include a Name Role in the export process, simply highlight the name role and press the Select option. You will then be taken to the Name Role Field Maintenance form, upon return to this form the Name Role will be bolded.

To de-select a name role, highlight the name role, hit Select, then press F11 to delete the role links. Upon return to this form the name role will not be bold.

Name Role Selection Form

Application/Code/Description

Indicates the Pathway Module, for example LAP – Applications, LLC – Licensing etc.
The Code indicates the standard name role types available within the selected module. The description is the description of the role type.

Search Profile – Role Number/Description

You can use either the Role Number and/or Role Description, to limit the type of Name Role displayed.

Name Role Field Maintenance Form

This form lists the fields that can possibly be included within the Name Role Maintenance and Enquiry functions of ePathway.

Name Role Field Maintenance form

Name Role
Indicates the Pathway Module, for example LAP – Applications, LLC – Licensing etc.
The Code indicates the standard name role types available within the selected module. The description is the description of the role type.

XML Tag Name/Description
The internal XML Tag and Description assigned to the Pathway field.

Search Field
This is an internally defined field that controls whether the field can be used to search for records in the Pathway Name and Address Register.

Mandatory
Allows you to define whether mandatory input is required for this field.

Active Indicator
Indicates whether the field is active and can be exported to ePathway. This gives you flexibility to control which fields are exported to ePathway.

Delete All
Use this option if you wish to remove a previously assigned Name Role type from the ePathway export process.

Application Class and Type Maintenance

Application Class Selection Form

This form lists the Application Classes that may be export and included within the ePathway Application Lodgement process.

To select a Class, simply highlight the desired record and press Select. You will then be presented with the Application Type select/remove form. When you have selected one or more Application Types, the Application Class with be bolded upon return to this screen. To de-assign an Application Class, highlight the Class, press Select, remove all Application Types and press OK.

The Application Class will no longer be bold when you return to this screen.

Application Class Selection Form

Class/Description
The Application Class Code and Description as defined within the Applications module.

Search Profile – Class/Description
Allows you to search for Applications Classes by Code and/or Description.

Application Type Maintenance Form

This form allows you to assign the Application Types that will be exported to and available on, the ePathway Application lodgement screen.

Use the select/remove options to assign / de-assign Application Types.

Application Type Maintenance Form

Class Details
The Application Class Code and Description as defined within the Applications module

Application Type
The list of available Application Types that may be included on the web site.

ePathway Application Type Details
The list of Application Types that will be exported to the ePathway Application Lodgement function.

Detail Button
Select this option to set the functional and data defaults for the Application Type.

Application Type Maintenance Form

Use this form to set the functional and data defaults for the Application Class / Type. These settings will be used to control the functionality available during the ePathway Application Lodgement process.

Application Type Maintenance Form (2)

Class Details
The Application Class Code and Description.

Application Type Details
The Application Type Code and Description.

Location Details
The Location options are set within Applications Parameter Maintenance, they indicate whether the Application can be lodged at Property, Parcel or Street Level.

Lodgement for Land in Other Council
Please Note: No functionality currently exists for this option.

Display Alternative Address Message
This option can be used to display a message when an Alternative Address is selected in ePathway. The check box is now available in ePathway Applications, Licensing and Customer Service.

If the 'Display Alternate Address Message' flag is switched OFF, the existing Alternate Address display and selection functionality will remain. If the flag is switched ON, a message will appear warning a user when they have selected an Alternate Address.
The message will prompt the user to select the 'Primary Property Address' or a different property altogether. This flag is available for each Application Type, License Type and Customer Request Type. The flag will be initially defaulted to OFF for all Types.

Status Change Email
This option can be used to send an email to the person who lodged the ePathway Application when a change of status has been made to the Application.

Display Additional Cost Message

If the 'Display Additional Cost Message' is checked on, the current ePathway message will be displayed.

Application Type	ED-ePathway Application Lodgement
Properties	27 Greenhill Road, Wayville SA 5034
Lodgement Fee	$40.00 *

* Please be aware that additional fees may be incurred once your application is processed.

Continue

If 'Display Additional Cost Message' is not checked on, the ePathway message will not be displayed.

Application Type	ED-ePathway Application Lodgement
Properties	27 Greenhill Road, Wayville SA 5034
Lodgement Fee	$40.00

:

Continue

The 'check boxes' will be set 'Off' by default for new Applications and License's. As the existing parameters exist within ePathway, it is not possible to create a conversion program to set the new options in Pathway to maintain these. Therefore, existing customers will be advised to check their existing settings in ePathway, prior to the upgrade, and set the new parameters in Pathway according to their requirements.

➢ 'Display Additional Cost Message' Check Box = ON

➢ 'Display Additional Cost Message for Zero Fees' Check Box = ON

The message will be displayed for Zero and Non-Zero Fees

➢ 'Display Additional Cost Message' Check Box = OFF

➢ 'Display Additional Cost Message for Zero Fees' Check Box = dimmed and cannot be set

The message will not be displayed for Zero and Non-Zero Fees

➢ 'Display Additional Cost Message' Check Box = ON

➢ 'Display Additional Cost Message for Zero Fees' Check Box = OFF

The message will not be displayed for Non-Zero Fees only.

Display Additional Cost Message for Zero Fees

If the 'Display Additional Cost Message for Zero Fees' is checked on, the current ePathway message will be displayed.

Application Type	ED-ePathway Application Lodgement
Properties	27 Greenhill Road, Wayville SA 5034
Lodgement Fee	$00.00 *

* Please be aware that additional fees may be incurred once your application is processed.

Continue

If the 'Display Additional Cost Message for Zero Fees' is checked off, the ePathway message will not be displayed.

Application Type	ED-ePathway Application Lodgement
Properties	27 Greenhill Road, Wayville SA 5034
Lodgement Fee	$00.00

Continue

> ➤ 'Display Additional Cost Message' Check Box = ON

> ➤ 'Display Additional Cost Message for Zero Fees' Check Box = ON

The message will be displayed for Zero and Non-Zero Fees

> ➤ 'Display Additional Cost Message' Check Box = OFF

> ➤ 'Display Additional Cost Message for Zero Fees' Check Box = dimmed and cannot be set

The message will not be displayed for Zero and Non-Zero Fees

> ➤ 'Display Additional Cost Message' Check Box = ON

> ➤ 'Display Additional Cost Message for Zero Fees' Check Box = OFF

The message will not be displayed for Non-Zero Fees only.

Disable MSF
The "Disable MSF" parameter is now available on the Application Type Maintenance screen. Note that this is only visible when the MSF authorised function is enabled and the "MSF control" parameter has been enabled. This "Disable MSF" flag will initially default to OFF.

Note: Since the 'type' is the actual class/type of the Application, the "Disable MSF" setting will be specific to the selected type when paid by credit card during the lodgement process.

Active
This option controls whether this Application Type is exported to ePathway.

Options – Application Type and Name Role Maintenance
This form allows you to assign the Application Name Roles you want to be available within the ePathway Application Lodgement process.

Use the select / remove options to select the role types.

Select the detail button next to the assigned role type to set its defaults.

Application Type and Name Role Maintenance
This form allows you to set the defaults for the selected Name Role.

Automatic Name Default
This option can be set to either;

Personal User Name
Company or Personal User Name
Property Owners
(none)

It is used by the lodgement process to attempt to automatically populate the name role with the Registered Users Company Name, Personal Name or the Property Owners Name. If the Application is being lodged by a Public User, only the Property Owner option is applicable.

Name Searching
This option can be set to either;

All Names
Applicant Names Only
(none)

It is used to define whether searches can be performed over the Pathway Name and Address Register. If the setting is All Names, any name can be enquired upon and selected for the role type. If the setting is Applicant Names Only, only names that are linked to the Applications Module as an applicant can be searched for and selected. If the setting is (none), no searching is allowed.

Allow entry of multiple names
If this is set on, then multiple names can be linked to the name role type. Otherwise only an single name can be selected.

Options – Application Type and Field Maintenance

This option allows you to define the fields that will be exported to ePathway for the selected Application Class / Application Type. It also allows you to nominate the fields that will require mandatory data entry.

If you select the Delete All option, the Application Type for the selected Class will not be exported to ePathway. Data is not deleted from the Pathway Applications module.

Options – Dimension Fields

This option allows you to select the dimensions that will be exported to ePathway for the selected Application Class / Application Type. It also allows you to nominate the dimensions that will require mandatory data entry. If the dimension is required for fee calculation, it will be made system mandatory and cannot be excluded from the export process.

Options – Miscellaneous Data Fields

This option allows you to define which Miscellaneous Data fields will be exported to ePathway for the selected Application Class / Application Type. It also allows you to nominate the Miscellaneous Data fields that will require mandatory data entry.

Options – Category Fields

This option allows you to define which Major / Minor Development Categories will be exported to ePathway for the selected Application Class / Application Type. It also allows you to nominate which Category will require mandatory data entry.

Options – Component Fields

This option allows you to define which Building Components will be exported to ePathway for the selected Application Class / Application Type. It also allows you to nominate which Component will require mandatory data entry.

Options – Consent Fields

This option allows you to define which Consent Types will be exported to ePathway for the selected Application Class / Application Type. It also allows you to nominate which Consent Type will require mandatory data entry.

Options – Condition Role Fields

Options – ePathway Property Type Selection

The ePathway Property Type Selection form allows users to nominate which Property Types will be 'selectable' from within the ePathway Application Lodgement process for this Application Type.

All existing ePathway Application Types will have all Property Types 'selectable' by default (i.e. appear on the right-hand side).

It will be at the discretion of the council as to whether they want any Property Types 'non selectable' in ePathway. It should be noted that Application Types defined after the release will not have any Property Types 'selectable' by default.

A property that has a 'non-selectable' Property Type will not be available for selection within ePathway for a particular Application Type. If this property is a part of a property hierarchy it will be displayed but not selectable. Alternatively if this property is a stand-alone 'base' property not within a property hierarchy, then it will not be displayed at all.

Note: if a Property Type is 'inactive' at a Property System Parameter level then it is not displayed or selectable anywhere in ePathway.

Property information in ePathway will now be displayed in property tiers. The indentation of sub-properties will now reflect the Property Selection structure in Pathway.

All of the above Property Selection enhancements are now consistent for each ePathway Applications, Licensing and Customer Service.

Application Type and Conditional Field Maintenance Form

Application Type and Conditional Field Maintenance Form

Class Details

Application Type Details

Application Type Field

Application Type Conditional Field

Application Type Conditional Field Value

Bookings Management Parameters

The following topics are covered in this section:

ePathway Bookings Parameter Setup

The ePathway Bookings Parameter form enable the user to control what Bookings parameters are made available on the web. Councils are able to control what Classes, Facilities, Attributes, Areas, Activities, Resources and Conditions are relevant to ePathway Bookings.

ePathway Bookings Class Selection form

This form allows the user to select Booking Classes to be made available on the web. The LHS of the form displays the available Classes which may be selected via the Select button to be available for ePathway.   The Modify button will only be available when Classes exist on the RHS.

Note: If a Booking Class is removed from the RHS of the form, all parameters will be lost. A warning message will display to alert the user: e.g. "All associated Parameters for Booking Class - Event Class are about to be deleted, continue? Yes,No"

The Booking Class box displays all available Pathway Booking Classes which may be selected for inclusion in ePathway. These Classes display in a tree structure.
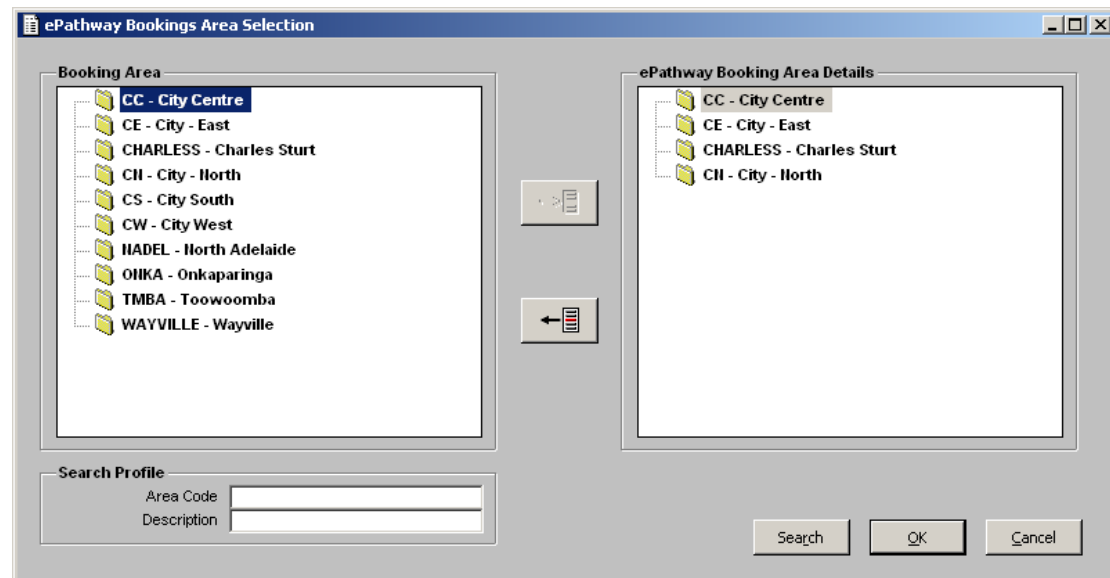
The ePathway Booking Class Details box displays any Booking Classes which have been selected to be available on the web.

ePathway Bookings Class Selection form

ePathway Bookings Area Selection Form

This form is used to select Booking Areas to be made available on the web. These will display in a tree structure. One or more Areas may be selected using the 'select button' to be added to the RHS of the form.

The Search Profile may be used to quickly locate a specific Booking Area or to limit the display to include only specific ones. Wildcard searching is available, e.g. A search using C* in the Area Code field will retrieve all Area Codes beginning with C on the LHS.

ePathway Bookings Area Selection form

ePathway Bookings Class Maintenance form

This form displays when a Booking Class on the RHS has focus and the Modify button is selected. It allows all details to be set up and maintained. All fields in the Details section are mandatory and must be completed.

ePathway Bookings Class Maintenance form

Booking Class
These fields display details of the selected Booking Class.

Default Receiving Officer

These fields allow a Default Receiving Officer to be nominated. This Officer will default into the Receiving Officer field for all Booking Requests submitted over the web for this Booking Class.

Default Responsible Officer

These fields allow a Default Responsible Officer to be nominated. This Officer will default into the Responsible Officer field for all Booking Requests submitted over the web for this Booking Class.

Default Customer Type

These fields allow a Default Customer Type to be set up for use over the web.

References

Three Reference Types are available to gather details about the person logging the Booking Request. These are as follows:

- Name Reference
- Email Reference
- Contact Number Reference

The Reference Types available for ePathway are the same as those set up for Pathway Bookings.

Reserved Booking Time

The Reserved Booking Time is the number of minutes measured from when the user invokes a Booking via ePathway. If a Booking made over the web is not confirmed by the user within this time period, then the Booking will be cancelled.

Active

The Active flag controls whether the Bookings Class is active and available for use.

Disable MSF

The "Disable MSF" parameter is now available on the Booking Class Maintenance screen for each selected Booking Class. Note that this is only visible when the MSF authorised function is enabled and the "MSF control" parameter has been enabled. This "Disable MSF" flag will initially default to OFF.

Options – Activity Types

Each Booking Class in ePathway may contain specific Activity Types. Whilst these are sourced from Bookings, a council has the flexibility to include only those required for Booking made via the web.

Options – Attributes

Each Booking Class in ePathway may contain specific Attributes. Whilst these are sourced from Bookings, a council has the flexibility to include only those required for Bookings made via the web.

Options – Facility Types

Each Booking Class in ePathway may contain specific Facility Types. Whilst these are sourced from Bookings, a council has the flexibility to include only those required for Bookings made via the web.

Options – Resource Types

Each Booking Class in ePathway may contain specific Resource Types. Whilst these are sourced from Bookings, a council has the flexibility to include only those required for Bookings made via the web.

ePathway Activity Type Selection Form

This form allows a council to set up specific Activity Types for a Booking Class which will be able to be selected via the web.

ePathway Activity Type Selection Form

Booking Class
These fields display details of the selected Booking Class.

Activity Types
The Activity Types available for the selected Booking Class display in a tree structure on the LHS of the form. Parent Activity Types may be expanded to display any Child Activity Types. Activity Types may be selected via the 'Select' button and added to the RHS of the form to be included in the Activity Types available for the Booking Class over the web.

Note: A Parent Activity Type must be selected before a Child Activity Type can be selected. (The Select button will not be available if this is attempted, and a message will display in the Task Bar: "Activity Type cannot be selected ! The Parent has not been selected."

ePathway Activity Type Details
The RHS of the form displays the Activity Types which have been selected to be made available for the Booking Class in ePathway. The Activity Types display in a tree structure with Child Activity Types displayed under their Parent.

Selected Activity Types may be made inactive by checking OFF the Active flag in the 'ePathway Activity type Maintenance form'. If an Activity Type is made inactive this will display in the Activity Type Details box, e.g.
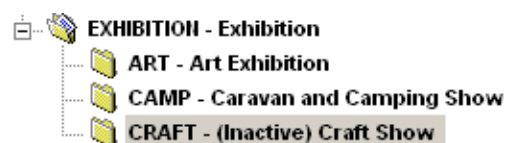
Search Profile

The Search Profile may be used to quickly locate a specific Activity Type or to limit the display to include only specific ones. Wildcard searching is available, e.g. A search using C* in the Activity Type Code field will retrieve all Activity Types (Parent and Child) beginning with C on the LHS.

ePathway Activity Type Maintenance form

The ePathway Activity Type Maintenance form allows the user to set up various parameters applicable to Activity Types. A Discount Reason may be set up to apply a Discount amount to an Activity whenever it is used in a Booking. In addition, the Activity Type may be made inactive from this form.

ePathway Activity Type Maintenance form

Booking Class
These fields display details of the selected Booking Class.

Activity Type
These fields display details of the selected Activity Type.

Discount Reason
A Discount Reason may be applied to an Activity Type. This Discount amount will then be applied to any Bookings made using this Activity Type.

Active
An Activity Type may be made inactive by checking OFF the Active indicator. The word (inactive) will then display in the Selection form to indicate this status.

ePathway Attributes Selection Form

This form allows specific Attributes to be set up for a Class. These Attributes may then be applied to a Facility. One or more Attributes may be selected using the 'select button' to be added to the RHS of the form.

The Search Profile may be used to quickly locate a specific Attribute or to limit the display to include only specific ones. Wildcard searching is available, e.g. A search using W* in the Attribute Code field will retrieve all Attribute Codes beginning with W on the LHS.

ePathway Attributes Selection form

ePathway Facility Type Selection Form

Specific Facility Types and Sub-Types are able to be selected for use in ePathway. One or more Facility Types may be selected using the 'select button' to be added to the RHS of the form.

The Facility Types available for the selected Booking Class display in a tree structure on the LHS of the form. Facility Types may be expanded to display any Facility Sub-Types. Facility Types may be selected via the 'Select' button and added to the RHS of the form to be included in the Facility Types available for the Booking Class over the web.

> Note: A Facility Type must be selected before a Facility Sub-Type can be selected. (The Select button will not be available if this is attempted, and a message will display in the Task Bar: "Facility Sub-Type cannot be selected ! The Parent Facility Type has not been selected."

The Search Profile may be used to quickly locate a specific Facility Type or to limit the display to include only specific ones. Wildcard searching is available, e.g. A search using P* in the Facility Type Code field will retrieve all Facility Type Codes beginning with P on the LHS.

Specific Facilities may also be selected for a Facility Type via the 'Modify' button

ePathway Facility Type Selection form

ePathway Facility Selection Form

Specific Facilities and Sub-Facilities are able to be selected for use in ePathway. One or more Facilities may be selected using the 'select button' to be added to the RHS of the form.

The Facilities available for the selected Booking Class display in a tree structure on the LHS of the form. Facilities may be expanded to display any Sub-Facilities. Facilities may be selected via the 'Select' button and added to the RHS of the form to be included in the Facilities available for the Booking Class over the web.

Note: A Parent Facility must be selected before a Sub-Facility can be selected. (The Select button will not be available if this is attempted, and a message will display in the Task Bar: "Sub-Facility cannot be selected ! The Parent Facility has not been selected."
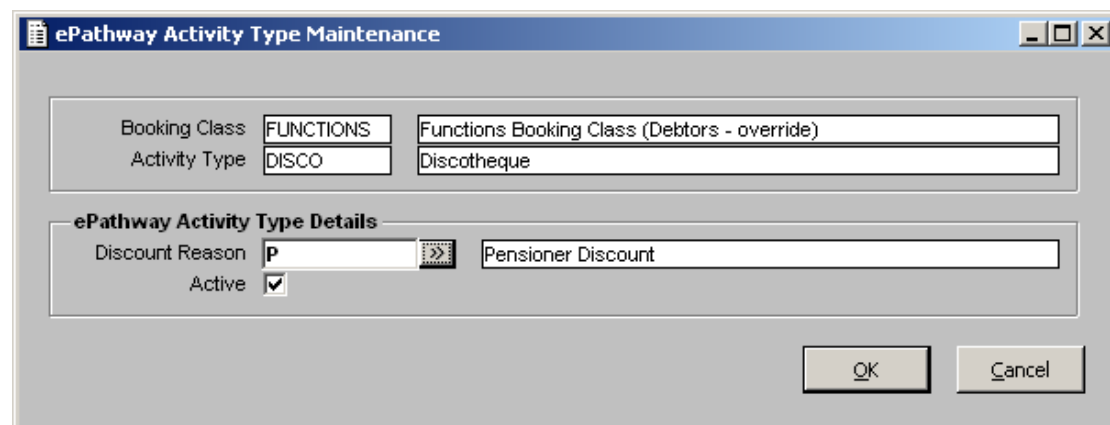
The Search Profile may be used to quickly locate a specific Facility or to limit the display to include only specific ones. Wildcard searching is available, e.g. A search using P* in the Facility Code field will retrieve all Facility Codes beginning with P on the LHS.

Resources may also be selected for a Facility via the 'Modify' button.

The Service Request button (new in Release 3.06) allows Service Request information to be defined at the Bookings Facility Type level. This will effectively override parameters set at the system level. See Internal Email Options.

ePathway Facility Maintenance form

For each Facility which is made available on the web, a council is able to select specific Resources. This form is used to select these Resources. These will display in a tree structure on the LHS. One or more Resources may be selected using the 'select button' to be added to the RHS of the form.

Additionally, for each Facility a 'Force Payment' indicator may be switched ON. This flag controls whether the booking of the Facility must be paid for immediately online or whether payment can be made at a later date. A 'Discount Reason' may also be defined against an ePathway Bookings Facility to apply a Discount when the Facility is booked.

Note: Resource Types must be set up in parameters before the display of available Resources attached to a Facility can be displayed on this form.

ePathway Facility Maintenance form

Booking Class
These fields display details of the selected Booking Class.

Facility
These fields display the selected Facility to which the Resources are attached.

Discount Reason
A 'Discount Reason' may be defined against an ePathway Bookings Facility to allow a council to apply a Discount when the Facility is booked.

Force Payment
For each Facility a 'Force Payment' indicator may be switched ON. This flag controls whether the booking of the Facility must be paid for immediately online or whether payment can be made at a later date. If the flag is set ON, then payment for the Booking must be made at the time of booking over the web.

Active
The Active indicator determines whether the Resources defined in this form will be available for export to the web.

Resource
The Resources available for the selected Facility display in a tree structure on the LHS of the form. Resources may be selected via the 'Select' button and added to the RHS of the form to be included in the ePathway Facility Resource Details.

ePathway Facility Resource Details
The RHS of the form displays the Resources which have been selected to be made available for the Facility in ePathway. The Resources display in a tree structure.

Search Profile

The Search Profile may be used to quickly locate a specific Resource or to limit the display to include only specific ones. Wildcard searching is available, e.g. A search using C* in the Resource Code field will retrieve all Resources beginning with C on the LHS.

ePathway Resource Type Selection form

Specific Resource Types for a Booking Class are able to be selected to be made available for ePathway Bookings.

This form is used to select Resource Types for a Booking Class to be made available on the web. These will display in a tree structure. One or more Resource Types may be selected using the 'select button' to be added to the RHS of the form.
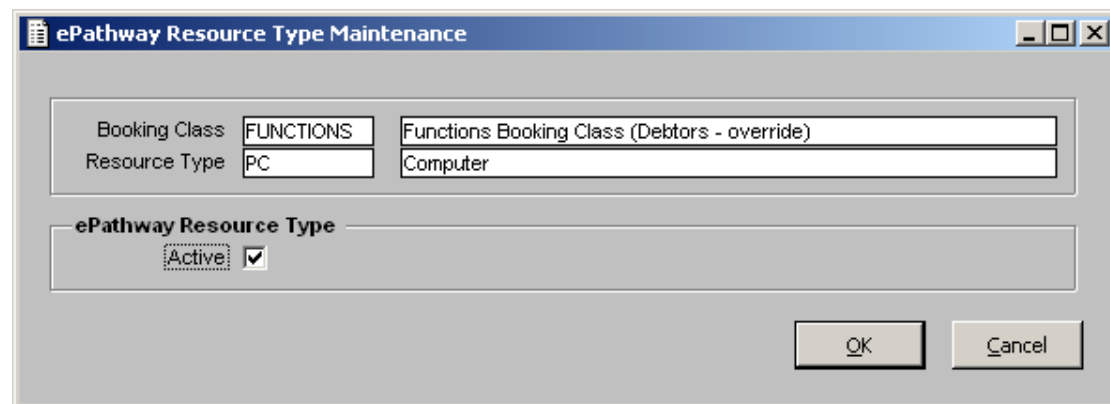
The Search Profile may be used to quickly locate a specific Resource Type or to limit the display to include only specific ones. Wildcard searching is available, e.g. A search using C* in the Resource Type Code field will retrieve all Resource Types beginning with C on the LHS.

ePathway Resource Type Selection form

ePathway Resource Type Maintenance form

This form allows the user to flag a Resource Type as active and available for use within ePathway.

ePathway Resource Type Maintenance form
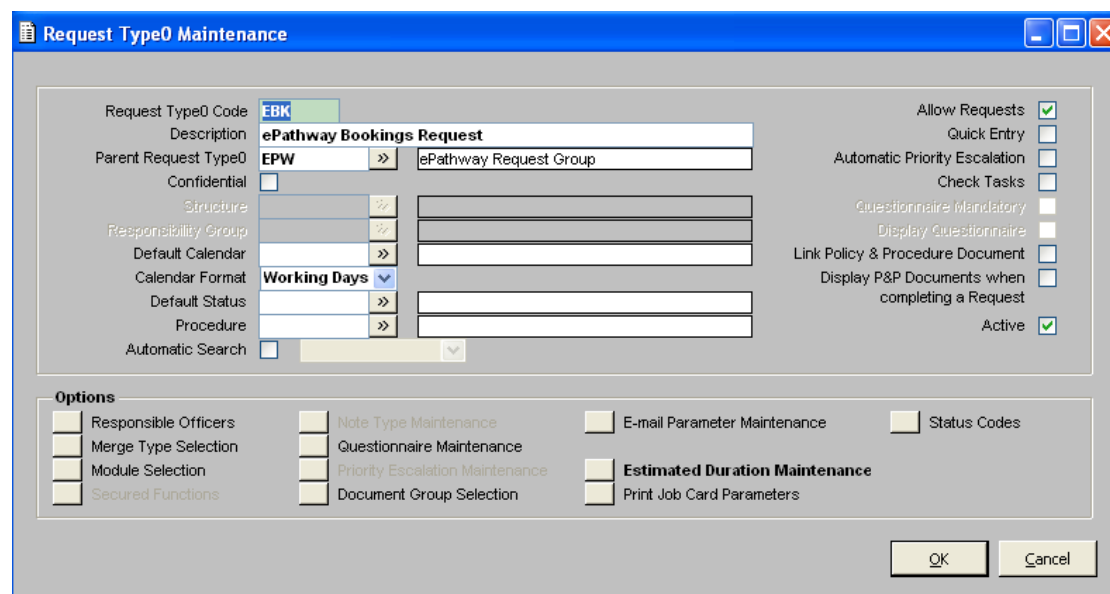
Internal Email Options

In order for notification emails to be sent to internal council staff following an ePathway Booking Request, the following parameters need to be reviewed and updated where necessary.

Customer Request Type

A new or existing Customer Request Type will be required. This will allow ePathway Booking Requests to associate an internal Customer Request record to each booking. This feature is consistent with other ePathway modules (e.g. Application Lodgement, Certificates etc). For example,

Customer Service -> Parameters -> Request Type Maintenance -> NEW

Service Request Maintenance

A new Bookings Service Request has been automatically created using initial data. This record needs to be reviewed and updated by council where appropriate. For example,
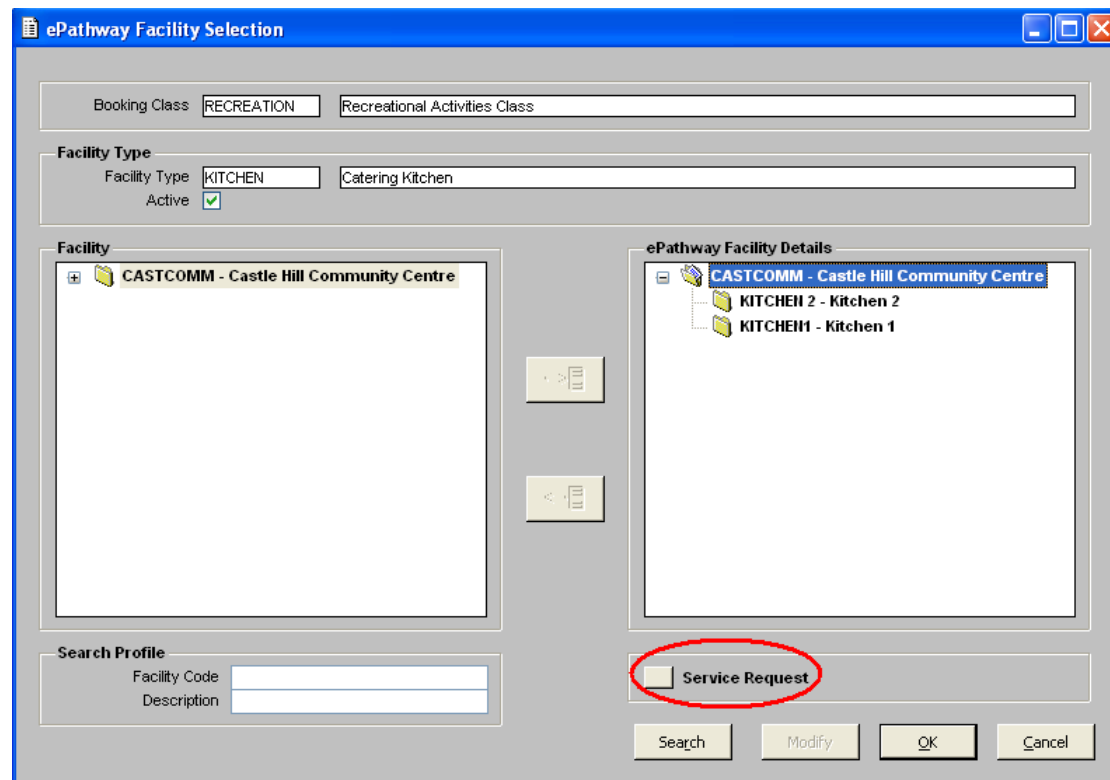
System Administration -> ePathway -> System Parameters -> Service Request Maintenance -> EBKV0070 (Process Booking)

The Subject and Email Message may be updated by council as required. Currently, if left unchanged, the Facility description will appear in the place of %DESCR% in the email message.

The 'Recipient' should be set to the council officer who by default will receive the ePathway Booking Request notifications.

By clicking on the Customer Service Request Type Maintenance button, a council may review and modify the Customer Service details. For example,

Facility Type Level Service Request
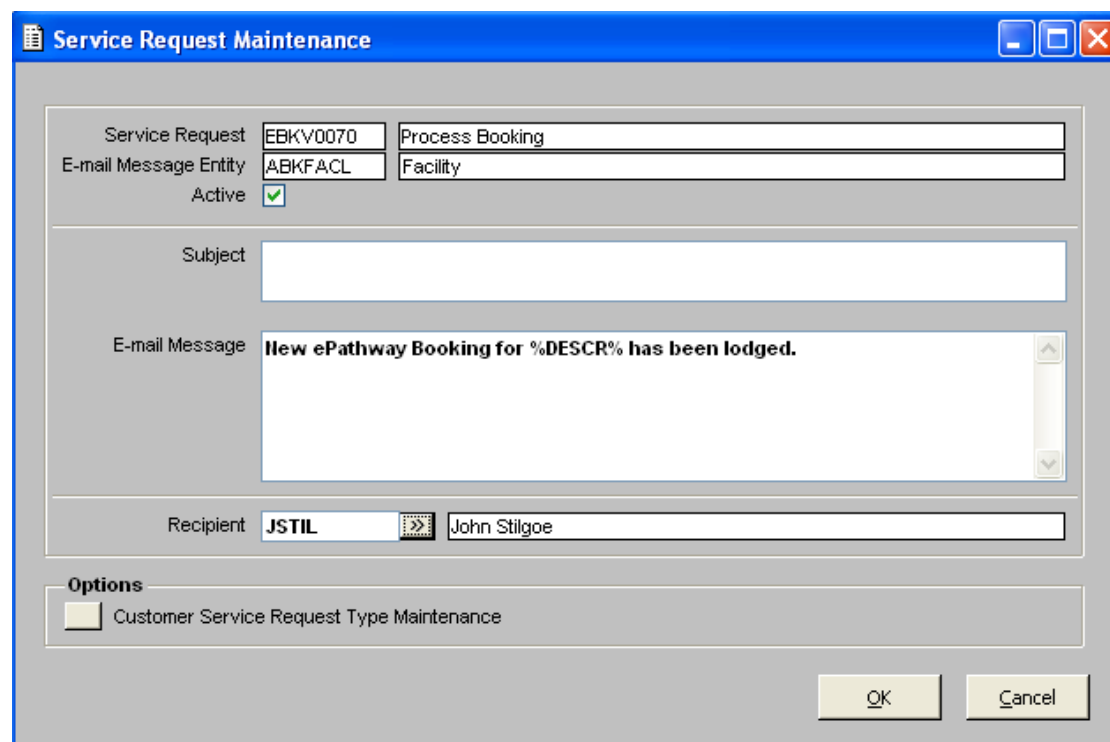
For added flexibility, Service Request information can also be defined at the Bookings Facility Type level. This will effectively override the parameters set at the system level. For example, for a Facility Type of 'Kitchen', the emails may need to go to a specific council officer.

Clicking on the Service Request button will allow a council to review and update the Service Request (and Customer Request) details. It should be noted that initially the details will default to the system level parameters. For example,

Note: These parameters may be defined for both the Facility Type and Facility Sub-Type.

As a result of the setup above, an internal officer would expect to receive an email similar to the following shortly after the lodgement of a booking request.
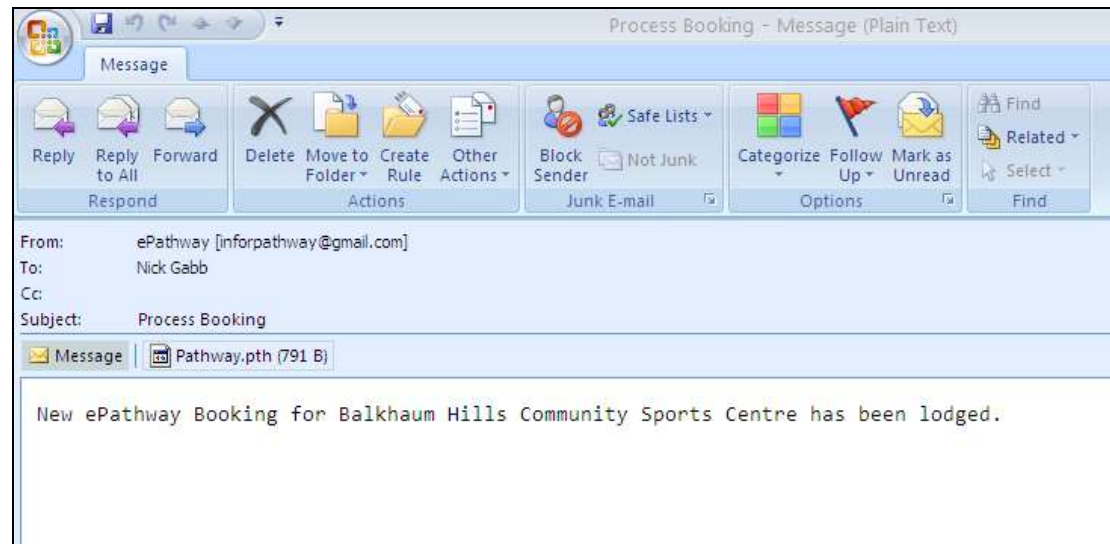
It should be noted that a Pathway glyph will appear on each notification email. This allows the council officer to immediately access the Booking Maintenance screen in Pathway for this particular record.

Creating a Booking on the Web

The following details describe the process of creating a Booking over the web in ePathway.

Create a New Booking in ePathway

There are four major steps in creating a new booking within ePathway. These steps consist of:
1. Selecting a booking class
2. Searching for and selecting a facility
3. Specifying the dates/times to book the facility (and any selected resources)
4. Making the booking payment

Selecting a Booking Class

The first step in making a new booking in ePathway is to select a Booking Class.
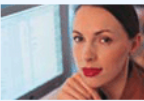
Booking Class Selection page

When a Booking Class is selected, this determines what Facilities, Resources, and Activity Types are available to be selected.

Browse Facilities

The Browse Facilities page allows the ePathway user to search for Facilities based upon different search criteria specified by the user. Search criteria include:

- Facility Type
- Activity Type and Sub-Type
- Area
- Attributes
- Resource Types
- Capacity Ranges

Browse Facilities page

Based upon the search criteria entered (if any) the Facilities that match all requirements specified by the user are displayed on the right side of the page, where only one Facility can be selected by the user to book. Once a Facility has been selected, the user is taken to the Booking Facility Details page.

The type of user that accesses this page and the Booking Class that is selected, determines whether any Facilities are available for selection. If a public user or a registered ePathway user, without a Pathway Debtors account, selects a Booking Class with an accounting method of Pathway Debtors (with no override), then the user will only be able to search for Facilities, as the facilities will not be available for selection (and subsequent booking).

Booking Facility Details

The Booking Facility Details page allows the user making a Booking, to specify the Resources to book and the dates/times at which to book the Facility. It is possible to attempt to book the Facility (and any of its Resources) on three separate dates/times in one step. The dates/times that the Facility is available to be booked are displayed at the bottom of the page along with the conditions associated with the Facility.

Booking Facility Details

Below are the details for your selected facility, please choose resources associated with this facility, and the date and time you want to book.

Facility

Facility	Kensington Church Hall
Area	City - East
Detail	Smallish Hall suitable for Dances, and balls.
Location	Anzac Highway ADELAIDE
Capacity	100

Please select resources you want to use

☐ Piano3

Please select an activity sub-type

Activity Type [Dance ▼]

Activity Sub-Type [Barn Dance ▼]

Booking Date and Time

Date	(dd/mm/yyyy)	**Time** From	(hh:ss) To	(hh:ss)
Date	(dd/mm/yyyy)	**Time** From	(hh:ss) To	(hh:ss)
Date	(dd/mm/yyyy)	**Time** From	(hh:ss) To	(hh:ss)

Available:

1. Monday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
2. Tuesday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
3. Wednesday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
4. Thursday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
5. Friday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
6. Saturday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099
7. Sunday from 12:00 AM to 11:59 PM between 25/07/2005 and 31/12/2099

Conditions

1. Heritage 1. Damage to Building. Writing or adhesives on the walls is prohibited
2. Security Provisions. Safety of patrons. No passouts allowed during the evening.

Book

Booking Facility Details page

It is a requirement that the user select an Activity Sub-type at this stage if one has not already been selected.

If the Facility or any of the selected Resources are not available for any one of the dates/times requested by the user, then the Booking Request does not proceed. Instead an error message is displayed indicating the dates/times the Facility is not available.

Booking Facility Details page showing date/time clash error messages

EPATHWAY BOOKING FACILITY CALENDAR

A new calendar has been introduced to the ePathway Bookings Module (Release 3.05). This new calendar allows an ePathway user to view and select 'available' dates and times for a facility on the calendar.

Currently Pathway Bookings has a standard feature that will allow a council administrator to view a monthly calendar to determine when a Facility is available. Similar functionality has now been introduced into ePathway Bookings so that users can check availability prior to entering dates and times. This will avoid the previous scenario whereby a user entered dates and times only to find that the facility was actually not available.

Booking Interval

The new Facility Calendar allows a user to scroll through the months of a year and select one or many dates for a booking. For each date nominated, the user is able to nominate a Start Time and End Time. The intervals of the start and end times are controlled by an ePathway Page Layout parameter for a facility. For example, a council may decide that for a particular facility, a 60 minute interval is sufficient and therefore no Bookings lodged via ePathway may contain a lesser interval. The new parameter appears as follows:

Layout -> Page Layout -> ePathway Bookings Management -> Facilities

As can be seen in the screenshot above, the 'Locker Room' facility is available in 15 minute intervals.

The time interval nominated for a particular facility will ultimately determine the intervals available on the 'Weekly Calendar'. For example,
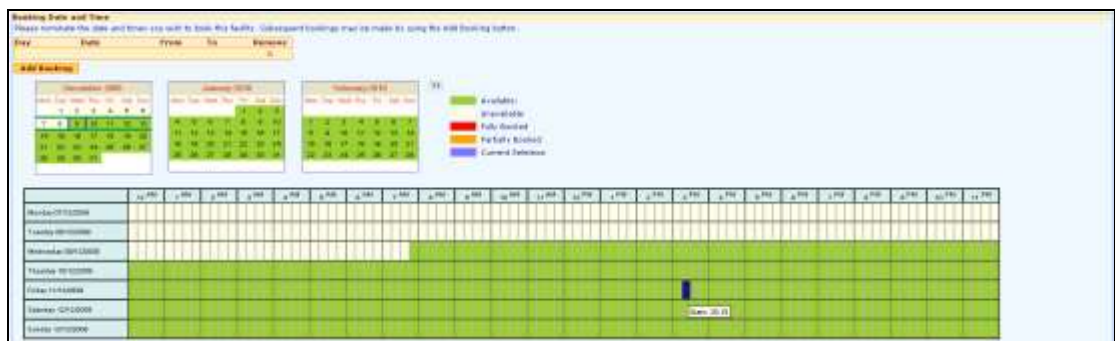
The screenshot example above represents a 15 minute interval, which effectively is the minimum allowable interval for the purposes of ePathway Bookings.

Alternatively, a council may require that a particular facility is to be booked in hourly (i.e. 60 minute) intervals. This would be represented as follows:

For simplicity and ease of use it is recommended that councils nominate either 15, 30 or 60 minutes as their standard Facility intervals.

Booking Facility Details

The ePathway Bookings 'Step 3 of 4: Booking Facility Details' has been enhanced to now include a Calendar that displays which dates and times a facility is available (versus already booked).

Booking Facility Details (Step 3 of 4)

Due to the size of the Booking Facility Details screen, the screenshot above only reflects the calendar portion of the screen. The Facility, Activity Types and any Resources (optional) must have already been nominated on this screen prior to nominating the booking date(s) and times. This reflects existing standard ePathway Bookings functionality.

Using the Booking Facility Calendar

Initially, the Booking Lines (underneath the Booking Date and Time Heading) will be empty. In order to create a Booking Line, the user must select the required date from the 'Monthly Calendar' and then select the required 'Start Time' and 'End Time' from the 'Weekly Calendar'.

Note: The user may not need to select the actual date from the monthly calendar if the required day belongs to the current week. The reason for this is because the 'current' week will already have focus and be displayed in the Weekly Calendar.

Upon nominating the 'Start Time' interval in the Weekly Calendar, a new Booking Line record (above the monthly calendar) will automatically be created. Initially this will set the 'End Time' to the end of the first 'interval'. For example, if 30 minute intervals are being used, and a Start Time of 8:00am was nominated, the end time would initially be set to 8:30am. The End Time may then be subsequently updated by clicking a later time for that day in the Weekly Calendar. This nominated booking interval will be highlighted to allow the user to see what they have selected. For example,

Once the 'End Time' has been nominated, the user may click the 'Book' button to continue to the confirmation page. From this point on, standard functionality will be evident.

Multiple Booking Lines

In order to create multiple bookings within the same request, the 'Add Booking' button may be used following the creation of the first Booking Line. Clicking the Add Booking button will create an empty Booking Line and allow the user to select another date and time combination.

There will be no limit to the number of dates (and times) nominated per Booking. Theoretically this implies that an ePathway user could create a pseudo 'Recurring Booking'. For example, using the calendar functionality described, a user could book a facility every Monday between 9:00 -> 10:00 for the next 12 months. This approach would be rather tedious however a 'Recurring Bookings' function will target this requirement and be released as a future ePathway development.

Due to the introduction of the new Booking Facility Calendar, the 'Booking.BookDateLineCount' ePathway system parameter (i.e. the number of date lines user can book in one booking request) was removed as it is no longer relevant.

Configuration -> System Parameters

Booking Line Deletion

The user has the ability to delete a Booking Line at any point by clicking the 'delete' glyph/icon. For example,

Availability Status

Similar to Pathway, the ePathway calendar will display whether or not a Facility for a specific date (and time) is 'available', 'unavailable' or 'partially available'. For example,

- Green indicates 'Available' for bookings.
- White indicates 'Unavailable' for bookings.
- Red indicates 'Fully Booked' and therefore unavailable
- Orange indicates 'Partially Booked', and hence only available at specific times for that day.
- Blue/Purple indicates 'Current (starting time) Selection' in the Weekly Calendar.

In the Monthly Calendar, the week which currently has focus will be highlighted. This will initially default to the current calendar week.

It should be noted that these colours can be changed by council via the relevant ePathway stylesheets.

The Weekly Calendar will present the user with the available times for a Facility. The available times will be determined by both:

a) Existing Bookings for a Facility
b) General Availability for a Facility

General Availability is governed by the Pathway Booking Facility parameters.

Bookings Management -> Bookings Management Parameters -> Class Parameters -> (select Class) -> Facilities button -> (select Facility) -> Available Times button

The Facility Available Date Maintenance screen allows an administrator to nominate Available Days and Date ranges, as well as the Available Times for the Facility. This is standard Pathway Bookings functionality however it is also relevant to the ePathway Facility Weekly Calendar display.

The Facility Available Time Maintenance parameters will be directly reflected within the new ePathway Weekly Calendar. For example,

Important Note: Start and End Times defined in Pathway parameters should not be of a denomination less than 15 minutes (i.e. the minimum 'interval' defined for a Facility in ePathway system parameters). For example, an 8:50am (or 9:10am) Start Time should not be used, as the Weekly Calendar (in this example) relies on a minimum 15 minute interval. Specifically in this case either 8:45am, 9:00am, or 9:15am should be used as a compatible Start Time.

Monthly Advance

The Facility Calendar initially allows a user to book a facility for any date within the current month and the following 2 months. By clicking the 'arrow' glyph adjacent the Monthly Calendar, a user may move forward 3 months at a time and book dates further into the future. For example,

It should be noted that there will be no 'specific' booking details displayed (e.g. who/what/why for previously existing bookings) in ePathway as this is solely a Pathway administration requirement. As far as the ePathway user is concerned, a date (and time) is either available or unavailable and if further information is required then the user would need to contact the council.

If a facility is unavailable for the required date/time(s), the ePathway user may use the page 'back' arrow to return to Step 2 and search for another Facility. For example, the user may use the search profile to find all facilities allowing for specific activities, within a particular area, and with a specific capacity.

As with all standard ePathway functionality, any new instructions or messages that appear in conjunction with this new Booking Facility Calendar functionality will be user-definable and thus configurable by the ePathway Administrator.

Booking Confirmation

The Booking Confirmation page is where the user is able to see a summary of all the Booking dates/times for the Facilities that have been selected.

Booking Confirmation page for a public ePathway user

To confirm the Booking requests made, the user must enter their contact number (email address is only applicable to public ePathway users) and select a method of payment. The payment method options available to the user are determined by:

- Whether or not the 'Force Pay' flag is activated against the Facility within ePathway parameters
- What the Accounting Method is set to for the selected Booking Class
- Whether the user is a public user or a registered ePathway user
- Whether the user is a registered ePathway user with a Pathway Debtors account

If the 'Force Pay' flag is activated on the Facility, then the payment method will always be Credit Card.

The options available for each type of accounting method set for a Booking Class are outlined below.

Booking Class –   Cash Accounting Method (no override)

A Booking Class with a Cash Accounting Method (with no override) only allows public and registered users of ePathway to pay by Credit card. Registered users may also raise a Cash Invoice, to pay at a later date.

However, if the facility has its 'Force Pay' flag activated, then the only payment method available is Credit Card.

Payment Methods Available to Users – Cash (no override)			
	Debtor Invoice	**Cash Invoice**	**Credit Card**
Public User	✗	✗	✓
Registered User	✗	✓	✓
Registered User with Debtors	✗	✓	✓

Account			

Booking Class   –   Cash Accounting Method (debtors override) / Debtors Accounting Method (cash

> > > *override)*

A booking class with a Cash Accounting Method, with a Debtors override, allows public and registered ePathway users (without a Pathway Debtors account) to pay by either Credit Card or raise a Cash Invoice.

Registered ePathway users, with a Debtors account, can pay by Credit Card or raise a Debtors Invoice.

Payment Methods Available to Users – Debtors (Cash override) / Cash (Debtors override)			
	Debtor Invoice	Cash Invoice	Credit Card
Public User	�×	�×	✓
Registered User	�×	✓	✓
Registered User with Debtors Account	✓	✗	✓

Booking Class   –   Debtors Accounting Method (no override)

A Booking class with a Debtors Accounting Method, with no override, only allows registered ePathway users, with a Pathway Debtors account, to make bookings. Public users or registered ePathway users without a Pathway Debtors account cannot make bookings in such classes.

Note that for these Booking Classes, facilities **Do not** have the 'Force Pay' activated by default.

Payment Methods Available to Users – Debtors (no override)			
	Debtor Invoice	Cash Invoice	Credit Card
Public User	✗	✗	✗
Registered User	✗	✗	✗
Registered User with Debtors Account	✓	✗	✗

Booking Header Status

After a Booking Request has been confirmed by the ePathway user, the status of the Booking is set accordingly. If the user set the payment method to Credit Card, then the booking has automatically had its status set to "Confirmed" (or its equivalent). Otherwise, if the payment method was set to Invoice, then the booking has its status set to "Awaiting Response" (or its equivalent).

Cancel Booking Request Line

Beside each booking line request is a 'Cancel' check box, which allows the user to select specific Booking Lines and to cancel those Booking Line requests, by pressing the 'Cancel' button.

Additional Facility Booking Requests

The user is able to select additional Facilities to be booked by pressing the 'More Facilities' button on the Booking Confirmation page. When this button is pressed, the user is brought back to the 'Browse Facilities' page. The user is able to search for and select a Facility to book, where the process of selecting Resources and specifying dates/times for the booking, are repeated.

Booking Facility Details – Booking Maintenance

From the Booking Confirmation page, the user is able to select any of the Booking Lines. Once a Booking Line has been selected the Booking Facility Details page is displayed, giving the user a summary of the booking line details. Details include:

- Dates/times facility is to be requested for booking
- Facility and resource fees (if any resources were selected)
- Resources selected or available for selection

Booking Facility Details page – Booking Maintenance

The user is able to modify the booking details where the dates/times and Resources selected are able to be modified and updated. Availability checks are performed to make sure that the amendments made do not cause clashes with other bookings.

Payment Entry (Credit Card payments only)

The Payment Entry page is where the total amount to be paid for the Booking Request is displayed for a Credit Card payment. This is where the user selects their card details (type, number, expiration date, and card holder name).

Payment Entry page

Booking Submission

The Booking Submission page contains reference details regarding the Booking and the payment.

Booking Submission page

The Booking Number is a customer's reference to the Booking Request and the Payment Reference Number is a reference to the payment made. The status of the booking is also displayed, indicating whether the booking is confirmed (or its equivalent) or it is awaiting council approval (or its equivalent).

Edit Booking

A user is able to edit the bookings that have not been confirmed by going to the 'Booking' option within the ePathway menu bar and selecting 'Edit Booking'.

ePathway menu bar displaying the 'Edit Booking' option

When this option is selected by a user, the 'Modify an existing Booking' page is displayed to the user, showing all booking records that have not yet been confirmed by the user.

Edit Booking page showing all booking requests that have not been confirmed by an ePathway user

The user is able to navigate to the Booking Confirmation page by selecting a Booking, where the user is able to confirm, or make further modifications to the Booking Request. The user is also able to select Booking Requests (via their respective check boxes) and cancel those requests by pressing the 'Cancel' button.

Public users accessing the Edit Booking function are only able to access those unconfirmed Booking Requests that have been created within the current ePathway session. At no other stage will public users be able to edit any of their Booking Requests. In effect, if the user closes their web-browser, their ePathway session has been terminated.
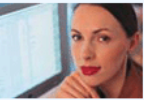
Booking Enquiry

The booking enquiry function allows ePathway users to search for and display details (i.e. the status) of the booking requests that have been confirmed.

Public ePathway users enquiring about the status of their bookings are required to enter their email address and the booking number of the booking request that was submitted.

Booking Enquiry page for a public ePathway user

Registered ePathway users have more flexibility in the way they are able to enquire about the booking requests they have made. Registered ePathway users are able to search for their Booking Requests by a specific booking number, by lodgement date, or to display all Booking Requests.

Booking Enquiry page for a registered ePathway user when searching for all booking requests

Booking Enquiry page for a registered ePathway user when searching by lodgement date

Booking Enquiry page for a registered ePathway user when searching for a specific booking

When the search for Bookings is complete, a table of all booking requests made by a particular user, is displayed where the user is able to display the details for a Booking Request by clicking on its respective 'Details' link.

Number of Bookings Found: 1					
Booking Number	Booking Class	Activity Name	Activity Sub-Type	Status	Details
1118	Recreational Activities Class	Park Barbecue	Park Barbecue	Awaiting Response	Details

Booking Enquiry page showing the table of booking requests made by a user

Only those Booking Requests that were created via ePathway will be displayed for ePathway users, no bookings created within council will be displayed.

Licence Entry Parameters

The following topics are covered in this section:

Licence Class and Type Maintenance

Licence Class Selection Form

This form lists the Licence Classes that may be export and included within the ePathway Licence Lodgement process.

To select a Class, simply highlight the desired record and press Select. You will then be presented with the Licence Type select/remove form. When you have selected one or more Licence Types, the Licence Class with be bolded upon return to this screen. To de-assign an Licence Class, highlight the Class, press Select, remove all Licence Types and press OK.

The Licence Class will no longer be bold when you return to this screen.

Licence Class Selection Form

Class/Description
The Licence Class Code and Description as defined within the Licensing module.

Search Profile – Class/Description
Allows you to search for Licence Classes by Code and/or Description.

Licence Type Maintenance Form

This form allows you to assign the Licence Types that will be exported to and available on the ePathway Licence lodgement screen.

Use the select/remove options to assign / de-assign Licence Types.

Licence Type Maintenance Form

Class Details
The Licence Class Code and Description as defined within the Licensing module

Licence Type
The list of available Licence Types that may be included on the web site.

ePathway Licence Type Details
The list of Licence Types that will be exported to the ePathway Licence Lodgement function.

Licence Type Maintenance Form

Use this form to set the functional and data defaults for the Licence Class / Type. These settings will be used to control the functionality available during the ePathway Licence Lodgement process.

Licence Type Maintenance Form

Class Details
The Licence Class Code and Description.

Licence Type Details
The Licence Type Code and Description

Location Details
The Location options are set within Licensing Parameter Maintenance, they indicate whether the Licence can be lodged at Property, Parcel or Street Level.

ePathway Licence Type Details

Lodgement for Land in Other Council
Please Note : No functionality currently exists for this option.

Display Alternative Address Message
This option allow for the display of a message when an Alternative Address is selected in ePathway. The check box is now available in ePathway Applications, Licensing and Customer Service.
If the 'Display Alternate Address Message' flag is switched OFF, the existing Alternate Address display and selection functionality will remain. If the flag is switched ON, a message will appear warning a user when they have selected an Alternate Address.
The message will prompt the user to select the 'Primary Property Address' or a different property altogether. This flag is available for each Application Type, License Type and Customer Request Type. The flag will be initially defaulted to OFF for all Types.
Figure 7 represents the new message that will appear in ePathway when an 'Alternate Address' is selected and the 'Display Alternate Address Message' flag is switched ON.

Status Change Email

This option allows for the sending of an email to the person who lodged the Licence when the status of the Licence is amended.

Disable MSF
The "Disable MSF" parameter is now (as of Release 3.05) available on the Licence Type Maintenance screen. Note that this is only visible when the MSF authorised function is enabled and the "MSF control" parameter has been enabled. This "Disable MSF" flag will initially default to OFF.

> Note: Since the 'type' is the actual class/type of the Licence, the "Disable MSF" setting will be specific to the selected type when paid by credit card during the lodgement process.

Active
This option controls whether this Licence Type is exported to ePathway.

Display Additional Cost Message
If the 'Display Additional Cost Message' is checked on, the current ePathway message will be displayed.

Application Type	ED-ePathway Application Lodgement
Properties	27 Greenhill Road, Wayville SA 5034
Lodgement Fee	$40.00 *

Please be aware that additional fees may be incurred once your application is processed.

Continue

If 'Display Additional Cost Message' is not checked on, the ePathway message will not be displayed.

Application Type	ED-ePathway Application Lodgement
Properties	27 Greenhill Road, Wayville SA 5034
Lodgement Fee	$40.00

Continue

The 'check boxes' will be set 'Off' by default for new Applications and License's. As the existing parameters exist within ePathway, it is not possible to create a conversion program to set the new options in Pathway to maintain these. Therefore, existing customers will be advised to check their existing settings in ePathway, prior to the upgrade, and set the new parameters in Pathway according to their requirements.

➢ 'Display Additional Cost Message' Check Box = ON

➢ 'Display Additional Cost Message for Zero Fees' Check Box = ON

The message will be displayed for Zero and Non-Zero Fees

➢ 'Display Additional Cost Message' Check Box = OFF

➢ 'Display Additional Cost Message for Zero Fees' Check Box = dimmed and cannot be set

The message will not be displayed for Zero and Non-Zero Fees

➢ 'Display Additional Cost Message' Check Box = ON

➢ 'Display Additional Cost Message for Zero Fees' Check Box = OFF

The message will not be displayed for Non-Zero Fees only.

Display Additional Cost Message for Zero Fees

If the 'Display Additional Cost Message for Zero Fees' is checked on, the current ePathway message will be displayed.

Application Type	ED-ePathway Application Lodgement
Properties	27 Greenhill Road, Wayville SA 5034
Lodgement Fee	$00.00 *

* Please be aware that additional fees may be incurred once your application is processed.

Continue

If the 'Display Additional Cost Message for Zero Fees' is checked off, the ePathway message will not be displayed.

Application Type	ED-ePathway Application Lodgement
Properties	27 Greenhill Road, Wayville SA 5034
Lodgement Fee	$00.00

Continue

➢ 'Display Additional Cost Message' Check Box = ON

➢ 'Display Additional Cost Message for Zero Fees' Check Box = ON

The message will be displayed for Zero and Non-Zero Fees

➢ 'Display Additional Cost Message' Check Box = OFF

➢ 'Display Additional Cost Message for Zero Fees' Check Box = dimmed and cannot be set

The message will not be displayed for Zero and Non-Zero Fees

➢ 'Display Additional Cost Message' Check Box = ON

➢ 'Display Additional Cost Message for Zero Fees' Check Box = OFF

The message will not be displayed for Non-Zero Fees only.

Licence Type and Name Role Maintenance Form

This form allows you to assign the Licensing Name Roles you want to be available within the ePathway Licence Lodgement process.

Use the select / remove options to select the role types.

Licence Type and Name Role Maintenance Form

Name Roles not available for entry during Lodgement
This is the list of name role that can be selected for export to ePathway

Name Roles available for entry during Lodgement
This is the list of name roles that will be exported to ePathway

Licence Type and Name Role Maintenance Form (2)

Licence Type and Name Role Maintenance Form

Automatic Name Default
This option can be set to either;

Personal User Name
Company or Personal User Name
Property Owners

(none)

It is used by the lodgement process to attempt to automatically populate the name role with either the Registered Users Company Name, Personal Name or the Property Owners Name. If the Licence is being lodged by a Public User, only the Property Owner option is applicable.

Name Searching
This option can be set to either;

All Names
Licensee Names Only
(none)

It is used to define whether searches can be performed over the Pathway Name and Address Register. If the setting is All Names, any name can be enquired upon and selected for the role type. If the setting is Licensee Names Only, only names that are linked to the Licence Module as an licensee can be searched for and selected. If the setting is (none), no searching is allowed.

Allow entry of multiple Names
If this is set on, they multiple names can be linked to the name role type. Otherwise only an single name can be selected.

Licence Type and Field Maintenance Form

This option allows you to define the fields that will be exported to ePathway for the selected Licence Class / Application Type. It also allows you to nominate the fields that will require mandatory data entry.

Licence Type and Field Maintenance Form

If you select the Delete All option, the Licence Type for the selected Class will not be exported to ePathway. Data is not deleted from the Pathway Licensing module

Mandatory/Active Flags
You can set this flag to either make the field mandatory or optional input.

Conditional Field

Licence Type and Conditional Field Maintenance Form

Licence Type and Conditional Field Maintenance Form

Options – Category Fields

This option allows you to define which Major and Minor Licence Categories will be exported to ePathway for the selected Licence Class / Licence Type. It also allows you to nominate which Category will require mandatory data entry

Options - ePathway Property Type Selection
This button allows users to define which Property Types will be 'selectable' when nominating a property in ePathway Application Lodgement.

Options – Service Request

Options – Dimension Fields
This option allows you to define which dimensions will be exported to ePathway for the selected Licence Class / Licence Type. It also allows you to nominate the dimensions that will require mandatory data entry. If the dimension is required for fee calculation, it will be made system mandatory and cannot be excluded from the export process

This option allows you to define which Miscellaneous Data fields will be exported to ePathway for the selected Licence Class / Licence Type. It also allows you to nominate the Miscellaneous Data fields that will require mandatory data entry.

This option allows you to define which Premise Codes will be exported to ePathway for the selected Licence Class / Licence Type. It also allows you to nominate which Premise Codes Data fields require mandatory input.

Options – Consent Fields

This option allows you to define which Consent Codes will be exported to ePathway for the selected Licence Class / Licence Type. It also allows you to nominate which Consent Code requires mandatory input.

Licence Entry Fields Maintenance

Lodgement Field Maintenance Form

This form lists all the fields that can possibly be exported and included on the ePathway Licence Lodgement pages.

Lodgement Field Maintenance Form

XML Tag Name/Description
The internal XML Tag Name and Description.

XML Type
The field type assigned to the field.

Maximum Size
The maximum field length assigned.

Active Flag
This field is a system mandatory for some fields, but may be set to in-active here or at Application Class and Type levels. This allows for certain fields for certain application types to be excluded from the export process.

Options
The options button allow you to link user defined data elements to certain fields.

Lodgement Field Mapping Maintenance Form

This form details the links between the ePathway XML tags and data elements in Pathway. It is used to direct data to fields that are user defined within Pathway. For example, ePathway

generates a unique ID number for all records, this ID can be used to find the created record in Pathway. The ID number is placed into a nominated Reference Type within the module.

It is strongly recommended that each of the detail button are visited on the Lodgement Maintenance Field Form, to confirm that imported data for user defined fields are assigned correctly.

Lodgement Field Mapping Maintenance Form

Lodgement Fields
This form allows you to assign difference Reference Types for different Licence Class / Type combinations. When an licence is lodged, the system generated ePathway ID number will be created for the Reference Type.

Load into Table
The Pathway Table that will receive the data.

Qualified by Table
The field within the table that will store the data.

Qualified by Field
The description of the field within the Pathway table.

Application Type
The list of Pathway Application types that have been identified for export and inclusion on the web pages

Qualified by Row
The selected Reference Type assigned to the Application Type.

Lodgement Field Value Maintenance Form

Lodgement Field Value Maintenance Form

Lodgement Fields

List Form Name

By Licence Type

Licence Details

Active Flag
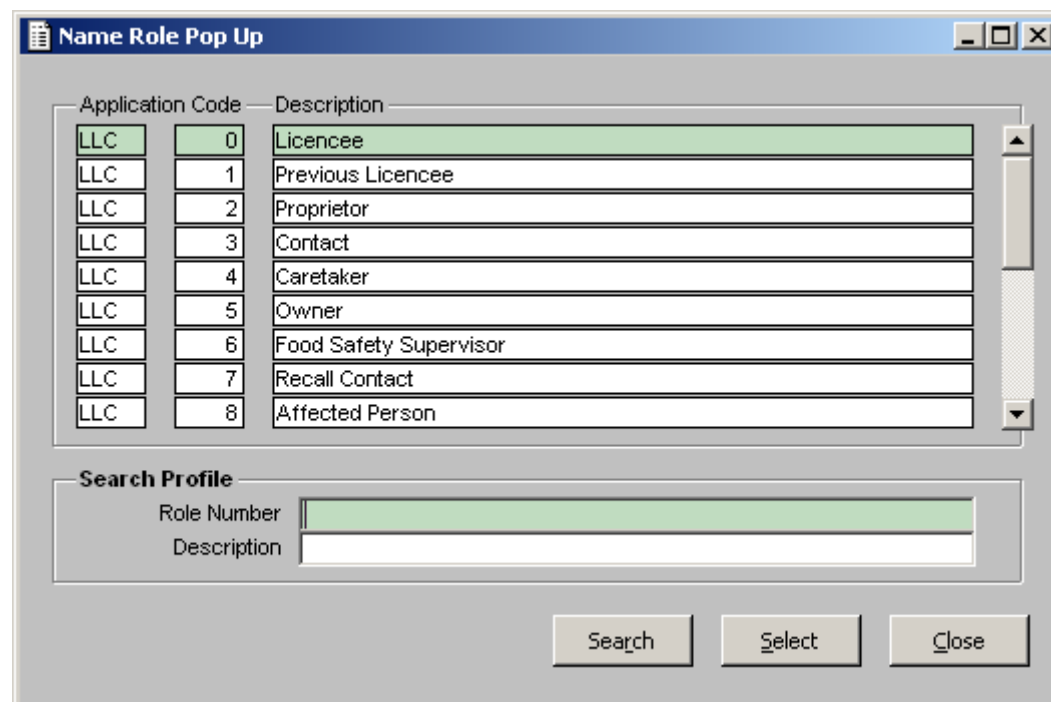
Name Role Field Maintenance

Name Role Pop Up Form

This form lists the Licensing Name roles that can possibly be included on the ePathway Licence Lodgement web pages.

To include a Name Role in the export process, simply highlight the name role and press the Select option. You will then be taken to the Name Role Field Maintenance form, upon return to this form the Name Role will be bolded.

To de-select a name role, highlight the name role, hit Select, the press F11 to delete the role links. Upon return to this form the name role will not be bold.

Name Role Pop Up Form

Application Code/Description

Indicates the Pathway Module, for example LAP – Applications, LLC – Licensing etc.
The Code indicates the standard name role types available within the selected module. The description, is the description of the role type.

Search Profile – Role Number/Description

You can use either the Role Number and/or Role Description, to limit the type of Name Role displayed.

Name Role Field Maintenance Form

This form list the fields that can possibly be included within the Name Role Maintenance and Enquiry functions of ePathway.

Name Role Field Maintenance Form

Name Role Details

Indicates the Pathway Module, for example LAP – Applications, LLC – Licensing etc.
The Code indicates the standard name role types available within the selected module. The description, is the description of the role type.

XML Tag Name/Description

The internal XML Tag and Description assigned to the Pathway field

Search Field

This is an internal defined field that controls whether the field can be used to search for records in the Pathway Name and Address Register.

Mandatory Flag

Allows you to define whether mandatory input is required for this field.

Active Flag

Indicates whether the field is active and can be exported to ePathway. This gives you flexibility to control which fields are exported to ePathway.

Customer Request Parameters

The following Topics are covered in this section:

Customer Request System Parameters
Customer Request Field Maintenance
Customer Request Type Maintenance
ePathway Customer Service Questionnaire Functionality

Customer Request System Parameter Maintenance

ePathway Customer Request System Parameter Maintenance Form

This form allows you to set the defaults for the ePathway Customer Request function. The defaults will be used when a Customer Request is created via ePathway.

ePathway Customer Request System Parameter Maintenance Form

Requestor Type Code

This is the Requestor Type Code that will be assigned to the Request.

Contact Type Code

This is the Contact Type Code that will be assigned to the Request.

Actioning Officer

This is the Actioning Office that will be assigned to the Request.

Receiving Officer

This is the Receiving Officer that will be assigned to the Request.

Responsible Officer

This is the Responsible Officer that will be assigned to the Request.

Customer Request Field Maintenance

Customer Request Field Maintenance Form

This form lists all the fields that can possibly be exported and included on the ePathway Customer Request pages.

Customer Request Field Maintenance Form

XML Tag Name/Description
The XML tag that has been assigned to the Pathway field.

XML Type
This determines whether the field is integer, list of values, single data line, comment field etc.

Maximum Size
This controls the maximum amount of data that can be entered into the field.

Active Indicator
Indicates whether the field is active and can be exported to ePathway. Fields can be set in-active if you do want them available on the ePathway screens.

Options
This button allows for the definition of the user defined Pathway data fields that will accept information from ePathway.

Customer Request Field Mapping Maintenance Form

This form details the links between the ePathway XML tags and data elements in Pathway. It is used to direct data to fields that are user defined within Pathway. For example, ePathway

generates a unique ID number for all records, this ID can be used to find the created record in Pathway. The ID number is placed into a nominated Reference Type within the module.

It is strongly recommended that each of the detail button are visited on the Customer Request Maintenance Field Form, to confirm that imported data for user defined fields are assigned correctly.

Customer Request Field Mapping Maintenance Form

XML Tag Name/Description
This form allows you to assign different Reference Types for different Customer Request Types. When an request is lodged, the system generated ePathway ID number will be created for the Reference Type.

Load into Table
The Pathway Table that will receive the data.

Qualified by Table
The field within the table that will store the data.

Qualified by Field
The description of the field within the Pathway table.

Request Type Code/Qualified by Row
The list of Pathway Request types that have been identified for export and inclusion on the web pages.

Customer Request Type Maintenance

Request Type Maintenance Form

This form allows you to select the Customer Request Types that will be available for export and inclusion on the ePathway screens.

Use the select / remove buttons to assign or de-assign a request type.

Request Type Maintenance Form

Request Type
The list of Request Types available for selection.

ePathway Request Type Details
The list of Request Types that will be exported to ePathway.

Search Profile – Request Type Code/Description
These options allow you to search for request types by Code or Description.

Request Type Maintenance Form

This form is presented when you select the modify button for a Request Type.

It allows you to define the defaults for the Request Type.

Request Type Maintenance Form

Request Type Code

The Code and description for the selected Request Type.

ePathway Request Type Details

The defaults that were entered in the Customer Request System Parameter Maintenance screen, will be displayed here. If required, you can change any of the above defaults if you wish the Request to be actioned by a different officer, or Requestor Type and Contact type codes.

Questionnaire Required

Set this flag 'On' if you require the ePathway customer to complete the questionnaire.

One Questionnaire per Request Type is able to be made the default for ePathway.

If the 'Questionnaire Required' flag is checked ON, then the Questionnaire fields will become available and will be mandatory. As a result, when a Web Server Export is done for Customer Service to ePathway, the Questions attached to the Questionnaire selected here will be exported.

> Note: The converted Questionnaire for each request Type will be used, in the conversion process, as the default ePathway Questionnaire. i.e. the Questionnaire fields on the ePathway Request Type Maintenance form (ECRG9001) will be populated with the code and description of the converted Questionnaire. This selection will subsequently be able to be modified by the user.

> Note: Any existing Questionnaires in ePathway will need to be revisited to ensure the Questions are still relevant

Note: The ePathway Customer Request Export will only export the Questionnaire if it is 'Active' and will only export Questions where the current date falls within the 'Effective Date' range for each particular Question (if nominated). Once the data is exported to ePathway it is recommended that the ePathway administrator reviews the Customer Request Pages to ensure that the questions appear as required. If significant changes to a Questionnaire (defined for use in ePathway) are made in Pathway it is recommended that councils redefine their associated web page layouts to cater for these differences.

Display Alternative Address Message
This option allow for the display of a message when an Alternative Address is selected in ePathway. The check box is now available in ePathway Applications, Licensing and Customer Service.
If the 'Display Alternate Address Message' flag is switched OFF, the existing Alternate Address display and selection functionality will remain. If the flag is switched ON, a message will appear warning a user when they have selected an Alternate Address.
The message will prompt the user to select the 'Primary Property Address' or a different property altogether. This flag is available for each Application Type, License Type and Customer Request Type. The flag will be initially defaulted to OFF for all Types.
Figure 7 represents the new message that will appear in ePathway when an 'Alternate Address' is selected and the 'Display Alternate Address Message' flag is switched ON

Active Indicator
Indicates whether the ePathway Request Type is active and be exported.

Options – Request Type and Name Role Type Maintenance
This from displays the Name Roles that have been linked to the Customer Request type. If you do not want the name role exported to ePathway, it must be removed via the Request Type Maintenance menu option.

Automatic Name Default
This option can be set to either;

Personal User Name
Company or Personal User Name
 (none)

It is used by the lodgement process to attempt to automatically populate the name role with either the Registered Users Company Name or Personal Name.

Options – Request Type and Property Role Type Maintenance

This form allows you to select the Property role types to be made available when a new Request is created.

The Mandatory and Multiple Links settings are controlled via Request Type Maintenance.

Options – Request Type and Field Maintenance
This form allows you to either make a field active or in-active and to control whether mandatory input is required.

The Delete All option will remove any changes made on this form and restore the system defaults.

ePathway Property Type Selection
This button allows users to define which Property Types will be 'selectable' when nominating a property in ePathway Application Lodgement
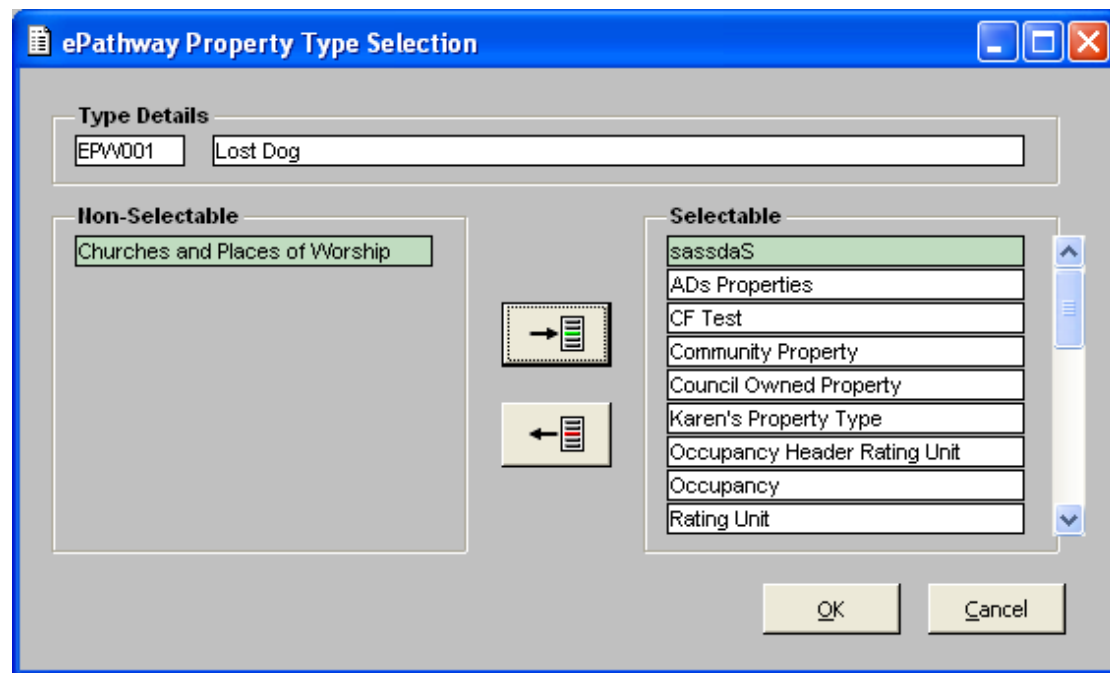
ePathway General Enquiry

The following topic is covered in this section:

Applications Enquiry Parameters

Applications Enquiry Parameters

Applications Enquiry Parameters Options Form

When setting up Applications for the ePathway General Enquiries 3 options are available and require setup for the process. These are :-
- Application Enquiry Field Maintenance
- Application Enquiry Stakeholders
- Application Enquiry List Parameters

Upon selecting one of these options will display the Application Selection form so that the Class required for ePathway can be chosen and set up.
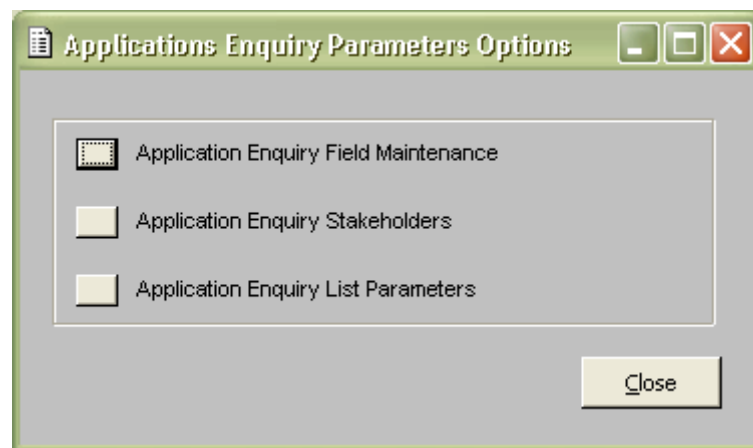
Applications Enquiry Parameters Options form

Application Enquiry Field Maintenance
Selecting this option will display the General Enquiry Field Maintenance form where fields that are required to be used when constructing the Enquiry form can be assigned.

Application Enquiry Stakeholders
Selecting this option will display the Stakeholder Roles Maintenance form where the Roles Types can be assigned that will be able to display information for Applications where the fields have been set as 'secured'.

Application Enquiry List Parameters
Selecting this option will display the General Enquiries List Maintenance form where criteria regarding the information and selection of applications can be set for each Class.

General Enquiry Field Maintenance Form

The General Enquiry Field Maintenance form is displayed when the Application Enquiry Field Maintenance has been selected from the Applications Enquiry Parameters Options form.

The form allows the User to assign the fields that will be able to be used when constructing the Enquiry form within ePathway.

This form assigns the fields that will be able to be used when constructing the enquiry form.
The following fields have been included for selection:

- Application Class
- Application Type
- Application Description
- Formatted Application Number
- Application Number
- Application Year
- Status
- Decision
- Responsible Officer (Primary Responsible Officer)
- Application Date
- Lodgement Date
- To be Commenced by Date
- To be Completed by Date
- Work Commenced Date
- Work Completed Date
- Expiry Date
- Overriding Site Address

Along with fields from the following areas:-

Name Details fields
> Name Role Type
> Name Formatted Name
> Name Formatted Address

Property Details fields
> Formatted Property Address
> Title
> Ward

Application Fees fields
> Application Fee Type
> Accepted Fee Amount
> Paid
> Balance
> Extra fields
> Accepted Fee Tax
> Bank Guarantee
> Calculated Fee
> Paid NonCash
> Paid Tax
> Refunded

Application Inspections fields
> Inspection Type
> Inspection Date
> Inspection Time
> Inspection Area
> Inspection Result
> Inspection Officer

Application Work Flow Tasks fields
> Application Task Type
> Actual Started Date
> Due Date
> Actual Completed Date

Task Responsible Officer

Application Consents fields
Consent Details
Consents Decision Types
Consents Decision Description
(NOTE this field is actually the Comments entered not the actual description).
Consents Decision Date)
Consents Effective Date
Consents Decision Authority
Consents Decision Number
Consents Decision Year
Consents Under Appeal

Decision fields
Decision Type
Decision Description
(NOTE this field is actually the Comments entered not the actual description).
Decision Date
Effective Date
Decision Authority
Decision Number
Decision Year
Decision Under Appeal

Applications Enquiry Parameters Options form

Application Details
The selected Application Class Code and Description as displayed in this area. This information is non maintainable.

Available
The Available fields that can be used for the Enquiry function are displayed in this area of the form. Once a field has been assigned then it is removed from the Available list and displayed in the Assigned area.

Assigned

The Assigned fields that can be used for the Enquiry function are displayed in this area of the form. Once a field has been assigned then it is removed from the Available list and displayed in the Assigned area.

Enquiry Type Maintenance

The Enquiry Type Maintenance form is displayed when the Application Enquiry Stakeholders option has been selected from the Applications Enquiry Parameters Options form.

The form displays the Application Types that are available for the nominated Application Class. Detailing out on a Type will display the Stakeholder Roles, Attachment Types and Response Types available for the Application Type.

Enquiry Type Maintenance form

Application Details

The selected Application Class Code and Description as displayed in this area. This information is non maintainable.

Type / Description

The Application Type and Description of Application Types available for the selection Class are displayed in this area. The Stakeholders Detail option is available for each Application Type displayed.

Stakeholders

Selecting the Stakeholders Detail option for an Application Type will display the Stakeholders Role Maintenance form.

Attach. Types

Selecting the Attachment Types button for an Application Type will display the Attachment Type Selection Form.

Response

Selecting the Response button for an Application Type will display the Application Response Maintenance Form.

Stakeholder Roles Maintenance Form

The Stakeholder Roles Maintenance form is displayed when the Stakeholders Detail option has been selected from the Enquiry Type Maintenance form for an Application Type.

The form displays the Application Name Role Types that are available for the nominated Application Class / Type and allows the assigning of those Name Roles that will be able to display information that has been set as 'secured' within ePathway General Enquiry.

Stakeholders are individual web users who are able to view 'secured' elements within ePathway General Enquiries. If the web user is on the Application as one of the nominated Name Role records then they will be able to display the 'secured' element. If the web user is not one of the nominated Name Roles records for the Application then the 'secured' element will not be displayed to the web user.

Enquiry Type Maintenance form

Application Details
The selected Application Class Code and Description as displayed in this area. This information is non maintainable.

Type Details
The selected Application Type Code and Description as displayed in this area. This information is non maintainable.
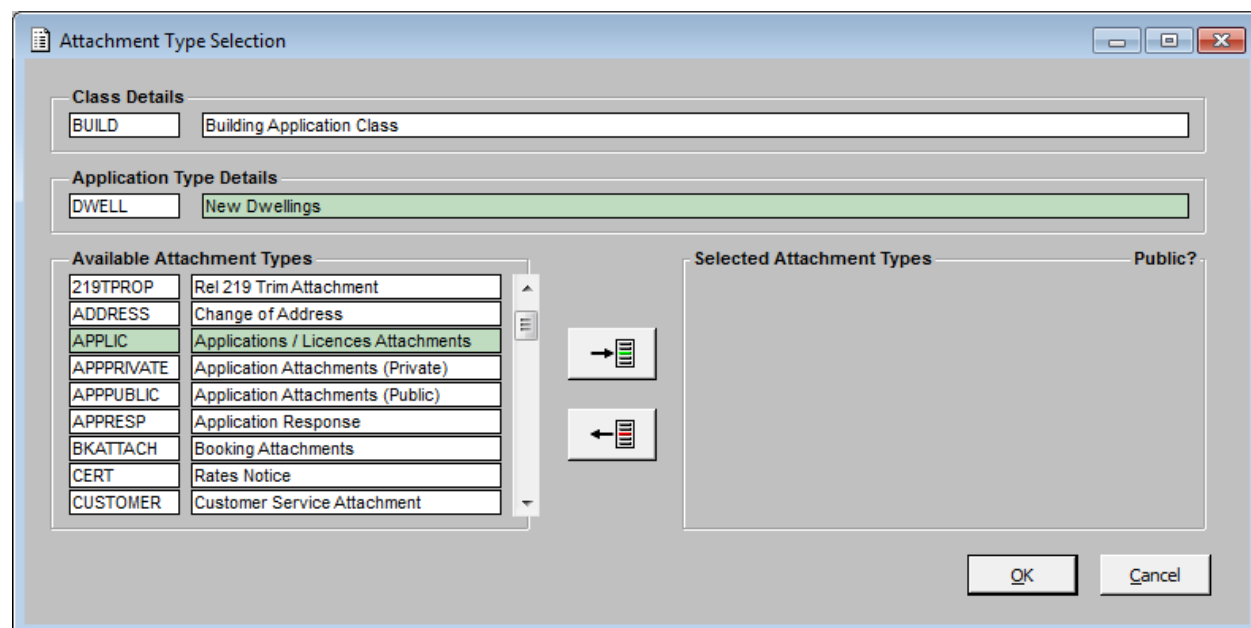
Available Name Role Types
The Available Name Role Types for the selected Application Class / Type are displayed in this area. Once a Name Role Type has been assigned it is removed from the Available list.

Assigned Name Role Types
The Assigned Name Role Types list displayed those Name Role Types that have been nominated to be used for the display of 'secure' elements within the ePathway General Enquiry function for this Application Class / Type.

Attachment Type Selection Form

This form allows you to select which Attachment Types are to be presented in ePathway for the current Application Type.

Attachment Type Selection form

Available Attachment Types
List of all attachment types.

Selected Attachment Types
List of selected attachment types.

Public?
The Attachment Types selected on the right side of the form will be accessible by all Stakeholders. Those marked as Public will be accessible by all users regardless of whether they are Stakeholders. Those on the left-hand side of the form will remain private and not seen via ePathway.

Application Response Maintenance

Application Responses functionality is available for applications lodged in both ePathway and Pathway. In alignment with this, the ePathway General Enquiry module supports the display of information pertaining to an application irrespective of where the application was lodged.

Application Response Maintenance Form

Response URLs

The ePathway External Request Broker has been modified to allow direct URL links to an Application Response. This allows Council to define the URL links that will appear within the Application Letters email functionality. RFI Response, Referral Response, and Objection URLs will allow customers immediate access to the respective ePathway response maintenance screens for the application. The User Registration URL will allow Council to configure where in ePathway the customer is directed in order to register (e.g. New User Registration or Automatic User Registration).

Each of the URLs needs to provide the URL required for their External Request Broker (ERB) and the associated General Enquiry List Type code e.g.
http://*sitedomain*/ePathway/*Production*/Web/GeneralEnquiry/ExternalRequestBroker.aspx?Type=*EnquiryListType*

The system will add each of the other query string parameters required by the ERB when it resolves the Merge Field value. So if we have an E-Mail template with {{ MERGEFIELD: EAP_FurtherInfo_Resp_URL }} embedded within, the system will take that URL and add to it the required Query String parameters for the ERB to present the correct form which may result in the following example URL:
http://auadwlg13v2/ePathway/Rel0308/Web/GeneralEnquiry/ExternalRequestBroker.aspx?Type=ENQLIST&Module=EGELAP&Class=1PCTA&ResponseType=FINFO&ApplicationId=187132&ForceLogin=true

The User Registration Merge Field (ePathway_Registration_URL) is resolved unmodified from that entered on the above form. And so should be entered as the URL required for user registration.

Customer Initiated Further Info. Response Type

Customer Initiated Objection Response Type
Two Customer Initiated Response Type parameters allow a Council to group customer supplied information that was not requested by Council (i.e. where there was no RFI or where there was no objection invitation). Both Further Information and Objections may be customer initiated and in order to automatically populate these in Pathway Application Responses, these parameters are required.

Allow Multiple Further Information Responses
Z_EGEG9180_EGERESP_MULTIRFI
If this is checked on, then the Responses displayed on the summary form will include those already responded to which have not expired. If this is unchecked, then only those Responses that have not yet been responded to will be included.

Allow Multiple Referral Responses
Z_EGEG9180_EGERESP_ MULTIRRESP
If this is checked on, then the Responses displayed on the summary form will include those already responded to which have not expired. If this is unchecked, then only those Responses that have not yet been responded to will be included.

Allow Multiple Objection Responses
Z_EGEG9180_EGERESP_ MULTIOBJCT
If this is checked on, then the Responses displayed on the summary form will include those already responded to which have not expired. If this is unchecked, then only those Responses that have not yet been responded to will be included.

Allow Customer Initiated Further Info whilst outstanding
Z_EGEG9180_EGERESP_ OUTSRFI
Whether Customer Initiated responses for Further Information can be made whilst there are still outstanding Response invitations for that type. E.g. If a letter has been issued to a customer to prompt for Further Information and this parameter is checked, then the customer will be allowed to either submit Further Information for the issued letter and/or submit another unsolicited Further Information response via a separate option on the Application Response summary page. If the parameter is unchecked then instead the customer must first respond to the council initiated Further Information invitation before they can submit an uninvited Further Information response.

Allow Customer Initiated Objections whilst outstanding
Z_EGEG9180_EGERESP_ OUTSOBJCT
Whether Customer Initiated responses for Objections can be made whilst there are still outstanding Response invitations for that type. E.g. If a letter has been issued to a customer to prompt for Objections and this parameter is checked, then the customer will be allowed to either submit further objections for the issued letter and/or submit another unsolicited Objection response via a separate option on the Application Response summary page. If the parameter is unchecked then instead the customer must first respond to the council initiated Objection invitation before they can submit an uninvited response.

Application Type and Further Information Maintenance
Clicking this button will take you to the Further Information Merge Types maintenance form that will allow you to select which Merge Types are applicable for "Further Information" Responses.

Application Type and Referral Maintenance
Clicking this button will take you to the Referral Response Merge Types maintenance form that will allow you to select which Merge Types are applicable for "Referral" Responses.

Application Type and Objection Maintenance

Clicking this button will take you to the Object Merge Types maintenance form that will allow you to select which Merge Types are applicable for "Objection" Responses.

Service Request

Clicking this button will take you to the Service Request Maintenance form where you can set up details for an email notification and customer service request creation (if required).

Further Information/Referral/Objection Response Merge Types Maintenance Form

This form will allow you to select which Merge Types are applicable for "Further Information/Referral/Objection" Responses.

Since RFIs are initiated within the Pathway Application Letters option, Merge Types effectively govern the different types of RFI available. Furthermore, the way in which the further information provided by the customer gets classified will be dependent on the type of RFI.

To allow for more than one type of Response, the Further Information/Referral/Objection Response Maintenance option is available. Councils are able to define the Merge Types and their associated Response Types for use within ePathway.

Further Information Merge Types Maintenance

Available Merge Types

List of all valid Merge Types for the Application Class.
Select to the right hand column those merge types that should trigger a Further Information/Referral/Objection Response record in ePathway.

Selected Merge Types

List of all selected Merge Types for the Application Class and Further Information/Referral/Objection Responses.

Letters generated using any of the selected merge types will trigger a Response Request record in ePathway.

Clicking the detail button will take the user to the Further Information/Referral/Objection Response Maintenance form where further settings are available for the merge type.

Further Information/Referral/Objection Response Maintenance

For each Merge Type selected, the detail button adjacent allows for configuration of the valid Response Types. This will determine the Response Types that will be selectable within ePathway for this particular Merge Type / Letter.

This Response Type will be the one that is automatically populated in Pathway following a response to an RFI.

Further Information Response Maintenance

Available Response Types
List of available Response Types (as defined within Application Parameters >> Response Type Maintenance)

Assigned Response Types
List of selected Response Types.
These Response Types will be available for selection in ePathway for the particular merge type. This value is populated in Pathway following a successful response submission.

Default
The 'Default' flag will determine which Response Type is selected by default when the user first enters the Further Information Maintenance screen in ePathway.

Response Expiry
A 'Response Expiry Period' parameter is available to allow council to 'expire' the option to respond to a request. The option to respond to an RFI in ePathway will be removed after the configured number of days. This parameter should be aligned to any workflow processes surround the applications progress.

The Expiry date calculation says:

ExpiryDate = LetterIssueDate + ExpiryDays
If (ExpiryDate > Today Then Treat as Expired

An expiry period of 1 day would be as follows:
Assuming 'today's' date is 10th October 2013
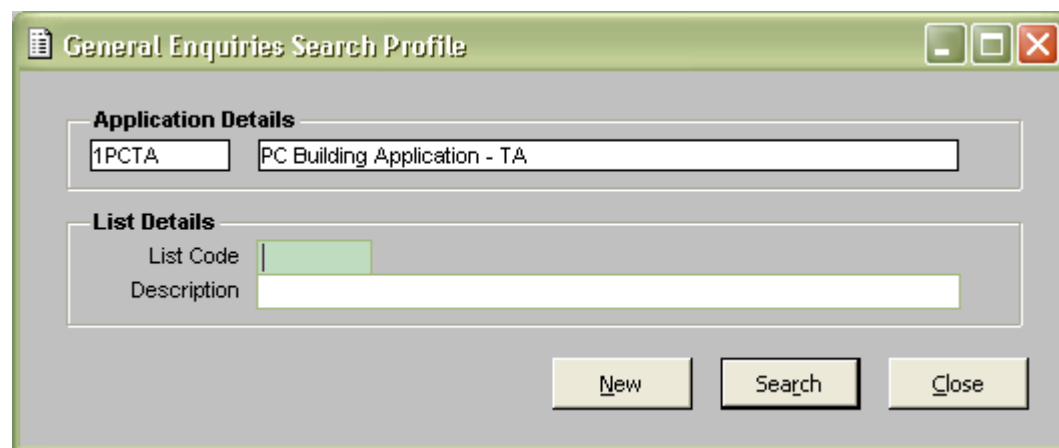
If the issue date of the document is 9-Oct-2013
The Expiry becomes 10-Oct-2013
And 10-Oct-2013 is not greater than today (10-Oct-2013).
The Response would be unavailable from midnight on 10th October.

General Enquiries Search Profile Form

Z_EGEF9020
The General Enquiries Search Profile form is displayed when the Application Enquiry List
Parameters option has been selected from the Applications Enquiry Parameters Options form.

The form allows the User to create a new List or search for an existing List.

General Enquiries Search Profile form

Application Details
The selected Application Class Code and Description as displayed in this area. This
information is non maintainable.

List Details – List Code
The List Code field can be used to search for an existing List in the system. This field can be
left blank.

List Details - Description
The Description field can be used to search for an existing List in the system. This field can
be left blank.

General Enquiries List Selection Form

The General Enquiries List Selection form is displayed when a search has been performed
from the General Enquiries Search Profile and more than one record has matched the entered
criteria. It displayed the Lists that are available.

The form allows the User to modify an existing List or create a new List.

General Enquiries List Selection form

Application Details
The selected Application Class Code and Description as displayed in this area. This information is non maintainable.

Type / Description
The Type Code and Description of existing Lists are displayed in this area.

General Enquiries List Maintenance Form

The General Enquiries List Maintenance form displays information relating to a List that is available for setup within ePathway General Enquiries. Unlimited User Defined Enquiry Lists can be created.

The selection criteria is where the list is defined – ie which Application records will be displayed in the List. Other select criteria can also be set using the Options buttons which appear at the bottom of the form. Any combination of Application Type, Decision, Status and Work Flow Task can be used to define the List.

NOTE:- If information is changed on this display form then it is necessary to re export the information to ePathway. Information changed within the Options section does not need to be re exported.

General Enquiries List Maintenance form

Application Details
The selected Application Class Code and Description as displayed in this area. This information is non maintainable.

List Code
The List Code can be a 6 character alpha/numeric code.

Active
The Active flag is used to identify those Lists which are available. The Active flag is automatically flagged ON when creating a new List.

Description
The Description field is used to clarify the use of the List. This is a 50 character field.

Selection Criteria - Omit Applications Lodged Before
When a date is entered into the Omit Applications Lodged Before field the system will only display records lodged after that date. The test is performed against the Application Lodgement Date. If a Web User enters a date range on their advanced search screen which is wholly or partially prior to the nominated Omit Before Date, a Warning Dialog message is displayed and the Start Date is defaulted to the parameter setting.

Access – ePathway Users
The ePathway Users option allows the assigning of the List to the relevant ePathway Users. Selecting this option will display the Application List User Maintenance form.

Access – Auto Allocate to New Users

If the Auto Allocate to New Users is flagged on then when a new Web User is registered and they have the ePathway General Enquiry Function assigned to them, this List will automatically become available to them.

Leave this field blank if the List is not to be granted automatically to any new Web Users that have the ePathway General Enquiry Function.

Searching

Councils may define Lists that are very broad and contain many records or a narrow List that would typically contain very few records. It is desirable to be able to customise whether the Web User is pre-emptively presented with a search page prior to the List. For example,the search page may not be required for a narrow List, but required for a broad List.

The following options are available within the Searching section of the form.

Display Search Page before List (Pre-emptive Search Page)
This option can be used to set whether the Search Page appears prior to the Enquiry List being displayed or whether it is bypassed. If it is to be bypassed, the Omit Search Page and Show Applications Lodged Last Days parameter needs to be entered to restrict the selection so as to not degrade performance by returning an unnecessarily large result set.

Omit Search Page and Show Applications Lodged Last nnn Days
The Omit Search Page and Show Application Lodged parameter is automatically set ON if the Display Search Page before List has been flagged Off.

If the Display Search Page parameter is flagged off then this parameter needs to be entered to restrict the selection so as to not degrade performance by returning an unnecessarily large result set.

If the Last Days field is set to Zero then Applications lodged on the current day will be retrieved.

If the Last Days field is left as null then all Lodgement Dates will be retrieved (this will be limited by the 'Omit Applications Lodged Before Date').

When set to a value, ie 90, Applications lodged within the last say ninety days will be retrieved (providing they match the other filter criteria and the Omit Date does not fall within the date range).

Show Search Button on List
If this parameter is checked on, the List Display will include an Advanced Search button. When the Web User clicks this button, they will be presented with the Application Search Page to enable them to re-define the selection criteria. This option is independent of whether the Search Page displayed pre-emptively or not.

Display Options – Detail Page – Email ePathway Contact

If Emails are to be made available to the Web User then Council can define whether the Emails are to be sent to a nominated ePathway Contact and / or the Primary Responsible Officer for the Application.

The selected ePathway Contact will display in the field below the flag for the Email ePathway Contact. The ePathway Contact can be selected by using the Detail option beside the display field.

NOTE: - if both the Email options are flagged OFF then the Email option is not available within the Web Detail Page for the Application within this Enquiry List.

Display Options – Detail Page – Email Primary Responsible Officer

Where this parameter has been set the Primary Responsible Office for the Application will be used for the Email.

This field can be used in conjunction with the Email ePathway Contact field.

NOTE: - if both the Email options are flagged OFF then the Email option is not available within the Web Detail Page for the Application within this Enquiry List.

Display Options – Detail Page – Name Roles
When the Name Roles option is selected, a select/remove option is available to define the Name Role Types that can be displayed when a Detail Enquiry is performed for the List.

NOTE:- If no Name Roles are defined within this option then no Name Roles will be available for display within the Web Page.

Display Options – Detail Page – Workflow Tasks
When the Workflow Tasks option is selected, a select/remove form is available to define the Workflow Task Role Types that can be displayed when a Detail Enquiry is performed for the List.

The Tasks nominated here are separate from the Options Workflow Task Types Search filter option.

NOTE:- If no Name Roles are defined within this option then no Name Roles will be available for display within the Web Page.

Allow Further Information
Ticking this flag on will include "Further Information" requests (ePathway Responses function) to be displayed on this Enquiry List.

Allow Referral Response
Ticking this flag on will include "Referral Responses" (ePathway Responses function) to be displayed on this Enquiry List.

Allow Objection
Ticking this flag on will include "Objection Responses" (ePathway Responses function) to be displayed on this Enquiry List.

Allow Public Objection
Ticking this flag on will include "Public Responses" (ePathway Responses function) to be displayed on this Enquiry List. Public Objections are generally set up in a separate Enquiry List (although not mandatory).

Options
The Application General Enquiry Lists can be filtered by Workflow Task Types, Status, Decisions and Application Types.

Filtering on Status and Application Types is an efficient way to reduce the number of Applications viewable in a List while Workflow and Decisions filtering takes more calculation time and so may slow down the search process.

Once detail has been set behind the Option it will be bolded.

Foreign Available Role Types Maintenance Form

The information displayed will change depending on whether the Name Roles or Workflow Task option was selected from the Display Options section for the List. This form allows for the selection of the Name Roles/Workflow Task that will be displayed when a Detail Enquiry is performed

Foreign Available Role Types Maintenance form – Name Roles

Foreign Available Role Types Maintenance form – Workflow Tasks

Application Details

The selected Application Class Code and Description as displayed in this area. This information is non maintainable.

List Code

The List Code and its description are displayed in these fields.

Available Name Role Type / Workflow Tasks

The Name Role Types / Workflow Tasks that are still available for selection are displayed in this area. Use the Select/Remove buttons to add or remove a Name Role Type / Workflow Task.

Assigned Name Role Types / Workflow Tasks

The Name Role Types / Workflow Tasks that are assigned are displayed in this area. Use the Select/Remove buttons to add or remove a Name Role Type / Workflow Task.

ePathway Enquiry List and Application Workflow Task Type Maintenance Form

This form allows for the selection of the Application Workflow Task Type to be used for the filtering of Applications to be displayed for the General Enquiry using this List.

One or more Workflow Tasks can be selected. The system will check that the Application has a Workflow Task that is equal to one of the Codes selected.

ePathway Enquiry List and Application Workflow Task Types Maintenance form

Application Details

The selected Application Class Code and Description as displayed in this area. This information is non maintainable.

List Details

The List Code can be a 6 character alpha/numeric code.

Available Workflow Task Types

The Available Workflow Task Types for the Application Class are displayed in this area. Workflow Tasks can be added or removed using the Select / Remove buttons.

Assigned Workflow Task Types

The Assigned Workflow Task Types are displayed in this area. Workflow Tasks can be added or removed using the Select / Remove buttons.

Status

An additional filter 'Task Status' can also be set for the assigned Workflow Task.

Upon assigning a Workflow Task the Status is defaulted to All. This can be changed by using the dropdown option to the other options available.

The Status options available are :-

All   Any Application with this Task will be included, regardless of the Status of the Task

Complete   The Task must be completed. i.e. an Actual Completion Date has been recorded on the Task.

Incomplete The Task has been started but not completed

Overdue   The Task is not completed and has an Estimated Completion Date that is less than the current date.

Note that the Statuses of Current, Pending and Suspend are not available.

General Enquiries List Maintenance Form

Application General Enquiry Lists can be filtered by the following properties:
- Workflow Task Types
- Status
- Decisions
- Application Types

Filtering on Status and Application Types is an efficient way to reduce the number of Applications viewable in a List while Workflow and Decisions filtering takes more calculation time and so may slow down the search process.

The information displayed depends on the Option selected from the List Maintenance form. This can be:-
- Application Types
- Decisions
- Status

Application Types
Where Application Types are displayed one or more Application Type can be assigned.

Decisions
Where Decisions are displayed one or more Decision Types can be assigned. The Decision Type is used to display Applications that have a current Decision that is equal to one of the codes selected. The system checks the Decision Date for the most recent record. If a Decision Code is not selected, all Applications, with or without a Decision record will be selected.

Status
Where Statuses are displayed one or more Status Codes can be assigned. The Status Code will be used to display Applications that have a current Status equal to one of the Codes selected.

ePathway Enquiry List and Application Types Maintenance form

ePathway Enquiry List and Status Maintenance form

ePathway Enquiry List and Decisions Maintenance form

Application Details

The selected Application Class Code and Description as displayed in this area. This information is non maintainable.

List Details

The List Code can be a 6 character alpha/numeric code.

Available

The Available List information will change depending on the Option selected from the List Maintenance form.

The detail can be one of the following :-
- Application Types
- Statuses
- Decisions

Use the Select / Remove buttons to add or remove the information for the List.

Assigned

The Assigned List information will change depending on the Option selected from the List Maintenance form.

The detail can be one of the following :-
- Application Types
- Statuses
- Decisions

Use the Select / Remove buttons to add or remove the information for the List.

Property Enquiry Parameters

Property Enquiry Parameters Options Form

When setting up Property for the ePathway General Enquiries 3 options are available and require setup for the process. These are:-
- Property Enquiry Stakeholders
- Property Enquiry List Parameters
- Enquiry List Assignment
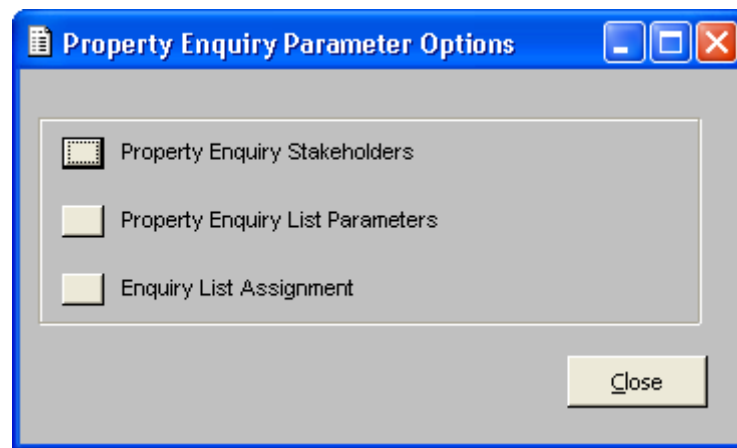
Property Enquiry Parameters Options form

Options

Property Enquiry Stakeholders
Selecting this option will display the Stakeholder Roles Maintenance form where the Roles Types can be assigned that will be able to display information for Properties where the fields have been set as 'secured'.

Property Enquiry List Parameters
Selecting this option will display the General Enquiries List Maintenance form where criteria regarding the information and selection of properties can be set.

Enquiry List Assignment
Selecting this option assign the General Enquire List to be used by other ePathway modules.

Stakeholder Maintenance Form

The Stakeholder Roles Maintenance form is displayed when the Property Enquiry Stakeholders Detail option has been selected from the Property Enquiry Type Maintenance form.

The form displays the Property Name Role Types that are available and allows the assigning of those Name Roles that will be able to display information that has been set as 'secured' within ePathway General Enquiry.

Stakeholders are individual web users who are able to view 'secured' elements within ePathway General Enquiries. If the web user is on the Property as one of the nominated

Name Role records then they will be able to display the 'secured' element. If the web user is not one of the nominated Name Roles records for the Proeprty then the 'secured' element will not be displayed to the web user.

Stakeholder Maintenance form

Available Name Role Types

The Available Name Role Types are displayed in this area. Once a Name Role Type has been assigned it is removed from the Available list.

Assigned Name Role Types

The Assigned Name Role Types list displayed those Name Role Types that have been nominated to be used for the display of 'secure' elements within the ePathway General Enquiry.
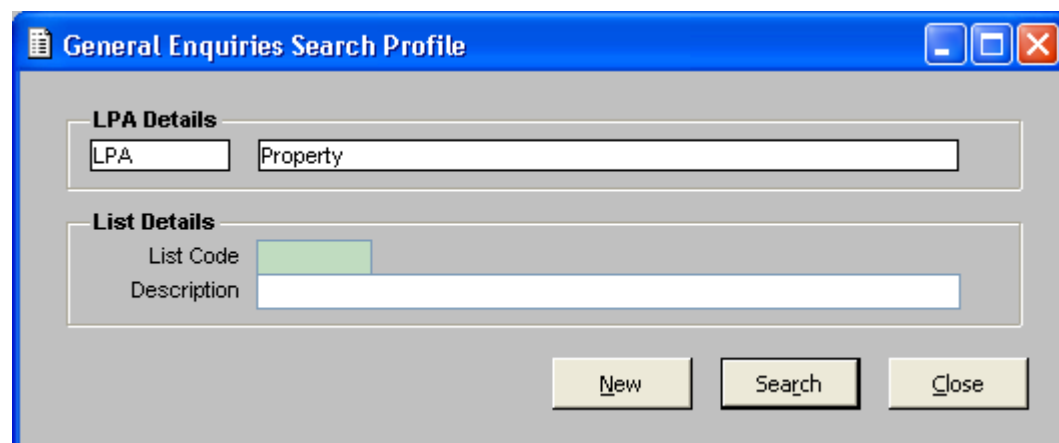
Enquiry List Maintenance

The Enquiry List Maintenance search form is displayed when the Property Enquiry List Parameter option is selected.

General Enquiries Search Profile Form

The General Enquiries Search Profile form is displayed when the Property Enquiry List Parameters option has been selected.

The form allows the User to create a new List or search for an existing List.

General Enquiries Search Profile form

LPA Details

The module Code and Description as displayed in this area. This information is non maintainable.

List Details – List Code

The List Code field can be used to search for an existing List in the system. This field can be left blank.

List Details - Description

The Description field can be used to search for an existing List in the system. This field can be left blank.

General Enquiries List Selection Form

The General Enquiries List Selection form is displayed when a search has been performed from the General Enquiries Search Profile and more than one record has matched the entered criteria. It displayed the Lists that are available.

The form allows the User to modify an existing List or create a new List.

General Enquiries List Selection form

LPA Details
The module Code and Description as displayed in this area. This information is non maintainable.

Type / Description
The Type Code and Description of existing Lists are displayed in this area.

General Enquiries List Maintenance Form

The General Enquiries List Maintenance form displays information relating to a List that is available for setup within ePathway General Enquiries. Unlimited User Defined Enquiry Lists can be created.

The selection criteria are where the list is defined – ie which Property records will be displayed in the List. Other select criteria can also be set using the Options buttons which appear at the bottom of the form.

NOTE:- If information is changed on this display form then it is necessary to re export the information to ePathway. Information changed within the Options section does not need to be re exported.

General Enquiries List Maintenance form

LPA Details
The selected module Code and Description as displayed in this area. This information is non maintainable.

List Code
The List Code can be a 6 character alpha/numeric code.

Active
The Active flag is used to identify those Lists which are available. The Active flag is automatically flagged ON when creating a new List.

Description

The Description field is used to clarify the use of the List. This is a 50 character field.

Searching

Councils may define Lists that are very broad and contain many records or a narrow List that would typically contain very few records. It is desirable to be able to customise whether the Web User is pre-emptively presented with a search page prior to the List. For example, the search page may not be required for a narrow List, but required for a broad List.

The following options are available within the Searching section of the form.

Display Search Page before List (Pre-emptive Search Page)

This option can be used to set whether the Search Page appears prior to the Enquiry List being displayed or whether it is bypassed. If it is to be bypassed, the Omit Search Page and Show Applications Lodged Last Days parameter needs to be entered to restrict the selection so as to not degrade performance by returning an unnecessarily large result set.

Show Search Button on List

If this parameter is checked on, the List Display will include an Advanced Search button. When the Web User clicks this button, they will be presented with the Application Search Page to enable them to re-define the selection criteria. This option is independent of whether the Search Page displayed pre-emptively or not.

Display Options – Detail Page – Name Roles

When the Name Roles option is selected, a select/remove option is available to define the Name Role Types that can be displayed when a Detail Enquiry is performed for the List.

> NOTE:- If no Name Roles are defined within this option then no Name Roles will be available for display within the Web Page.

Display Options – Detail Page – Conditions

When the Conditions option is selected, a select/remove option is available to define the Condition Types that can be displayed when a Detail Enquiry is performed for the List.

> NOTE:- If no Condition Types are defined within this option then no Conditions will be available for display within the Web Page.

Options – Property Types

Filtering on Property Types is an efficient way to reduce the number of Properties viewable in a List.

Once detail has been set behind the Option it will be bolded.

Enquiries List Assignment
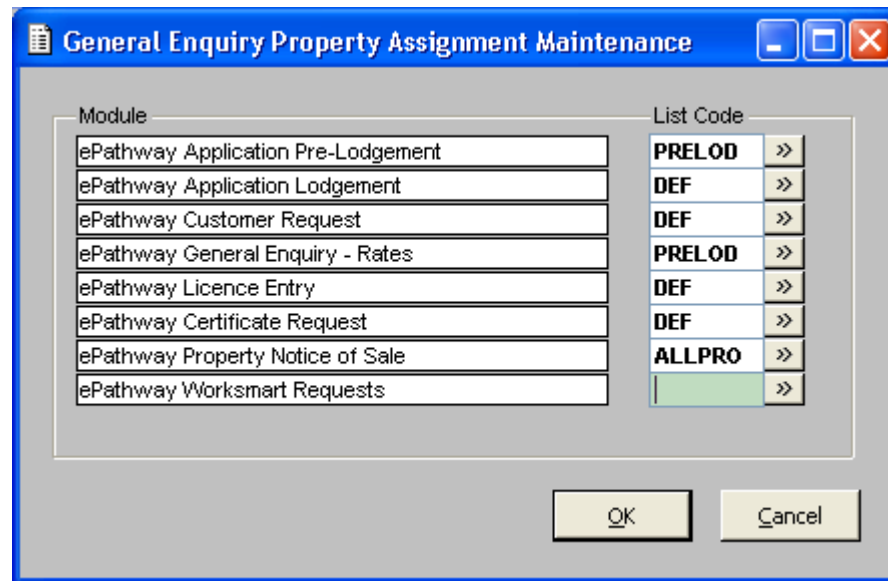
This option allows the nomination of a Property Enquiry List to be used when the Property Information Glyph is selected from the modules listed below.

When the List Code Popup is selected, a list of available Property Lists will be displayed for selection.

Rates Enquiry Parameters

Rates Enquiry Parameters Options Form

When setting up Rates for the ePathway General Enquiries 2 options are available and require setup for the process. These are :-

- Rates Enquiry List Parameters
- User Defined Description Maintenance
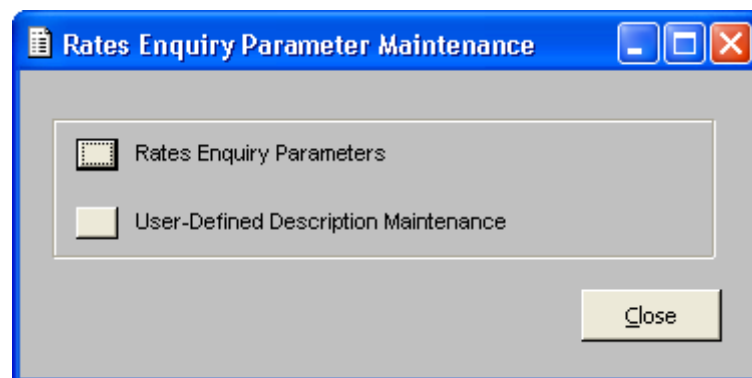
Rates Enquiry Parameters Options form

NOTE: Rates enquiry is only available for an ePathway registered customer and only for Rates they are linked to as Ratepayer.

Options

Rates Enquiry List Parameters
Selecting this option will display the General Enquiries List Maintenance form where criteria regarding the information and selection of rates assessments can be set.

User-Defined Description Maintenance
This option allows you to define 'user text' to override the existing Pathway 'default text'. This will specifically allow for user-defined descriptions of all Factor Types, Valuation Types and Rate Types. For example, the Factor Type, 'Annual Value' (i.e. the default description) could be user-defined and named 'Rating Period Value'.

General Enquiries List Parameter Maintenance Form

The General Enquiries List Maintenance form displays information relating to a List that is available for setup within ePathway General Enquiries.

The selection criteria are where the list is defined – ie which Rates Assessment records will be displayed in the List. Other select criteria can also be set using the Options buttons which appear at the bottom of the form.

NOTE:- If information is changed on this display form then it is necessary to re export the information to ePathway. Information changed within the Options section does not need to be re exported.

General Enquiry Rates Parameter Maintenance form

LRA Details

The selected module Code and Description as displayed in this area. This information is non maintainable.

Controls - Display Previous Rating Periods

If this option is set to 'True', the system will allow for Previous Rating Period transactions to be displayed. An option in ePathway is available to allow for the selection of a previous Rating Period using a hyperlink/dropdown. If this option is not set, only transactions for the current rating period, based on the Rates Accounting System Parameters, will be displayed.

The 'Rates Enquiry Details' screen will only allow the customer to select Rating Periods that they are eligible to see (i.e. from the date at which they gained ownership of the property or the date of the earliest information in Pathway, whichever is later).

Display Options – Detail Page – Name Roles

When the Name Roles option is selected, a select/remove option is available to define the Name Role Types that can be displayed when a Detail Enquiry is performed for the List.

NOTE:- If no Name Roles are defined within this option then no Name Roles will be available for display within the Web Page.

Display Options – Detail Page – Valuation Types

When the Valuation Types option is selected, a select/remove option is available to define the Valuation Types that can be displayed when a Detail Enquiry is performed for the List.

NOTE:- If no Valuation Types are defined within this option then no Valuations will be available for display within the Web Page.

Options – Status

Filtering on Assessment Status is an efficient way to reduce the number of Assessments viewable in a List.

Once detail has been set behind the Option it will be bolded.

User-Defined Description Maintenance Form

This option allows you to define 'user text' to override the existing Pathway 'default text'. This will specifically allow for user-defined descriptions of all Factor Types, Valuation Types and Rate Types. For example, the Factor Type, 'Annual Value' (i.e. the default description) could be user-defined and named 'Rating Period Value'.

General Enquiry - Registers

The ePathway General Enquiry Registers functionality allows Web Users to search and view Pathway Registers information online.

Councils may decide which Pathway Registers, as well as which Register Fields will be available online as well as which fields (or module links) within each Register the Web User may search upon. The ePathway administrator is able to define the online page layout for each Register List, including a Summary View and a Detail View.

It should be noted that ePathway General Enquiry Registers is only intended to be an enquiry facility. The proposed ePathway Register maintenance functionality will be undertaken in a future Pathway Release.

This is an Authorised Function – "ePathway General Enquiry - Registers". Access to this function will not be available unless the Authority Code is purchased. It should be noted that authorisation to the other existing General Enquiry modules does NOT entitle a council to access General Enquiry Registers.

eRegisters Authorised Function Maintenance Form

PATHWAY PARAMETERS

A new menu option has been added to the 'ePathway -> General Enquiry Parameters' menu group. The 'Register Enquiry Parameters' menu option allows a council to define the parameters that will control what Register information will be available in ePathway.
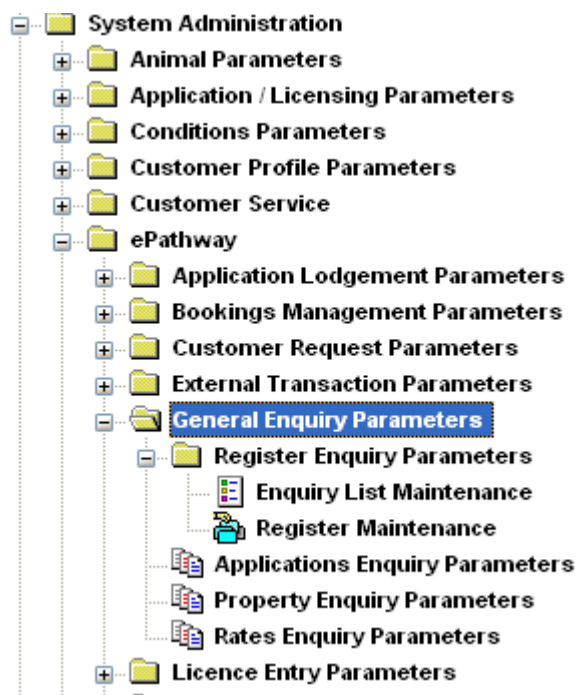
Register Maintenance

The Register Type Maintenance option presents the council with the ability to assign the Register Types to be available within ePathway. Once a Register Type has been assigned, the administrator will be able to assign the Register Fields (using <detail> button adjacent) that are also to be made available in ePathway.
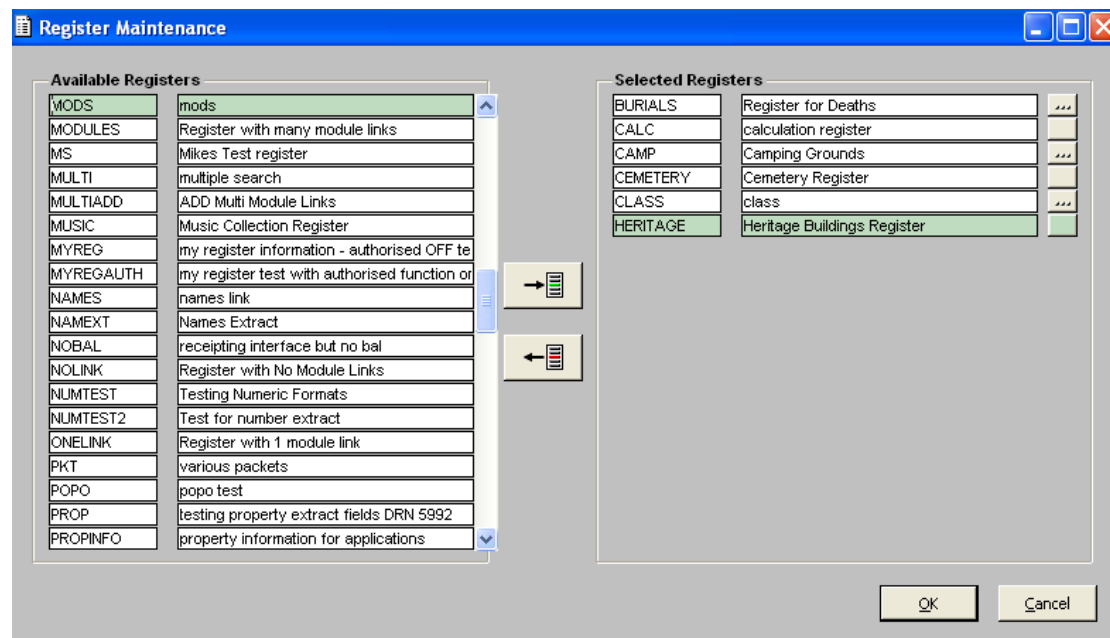
Register Field Allocation

The Register Field Maintenance option will allow the council to select the Register Type fields to be utilised within ePathway.

Register Field Maintenance Form

Registers Enquiry - Available Fields
This is a list of fields that are available for selection to display in ePathway. For the field to be available it must be moved to the right hand side of the form ie Selected Fields
Any amendments made to the fields will require the Web User Export function to be run.
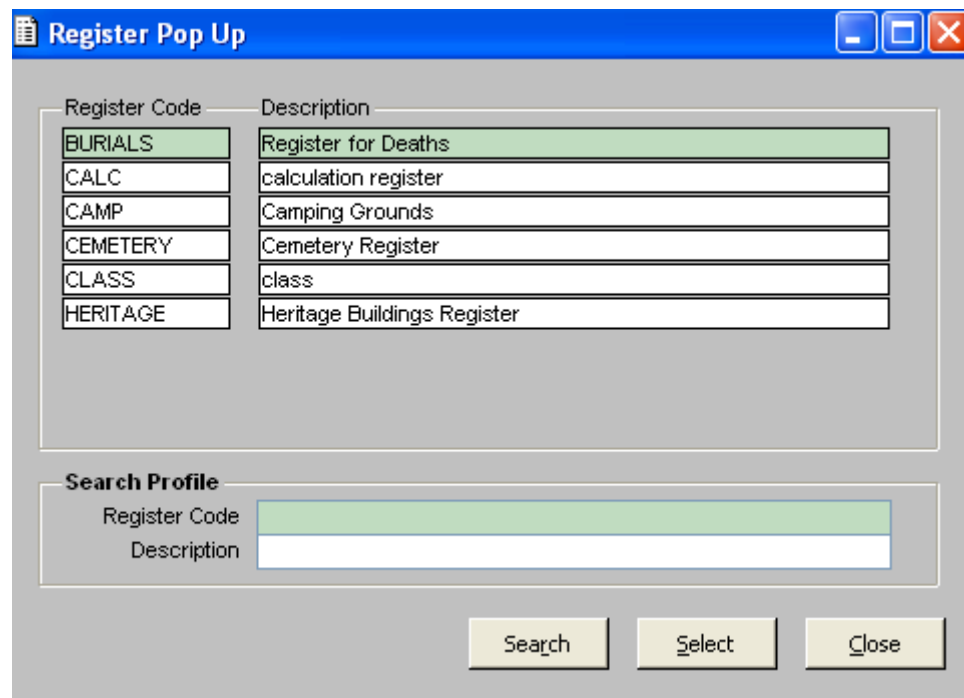
Registers Enquiry – Selected Fields
This is the list of fields that have been selected for display in ePathway. To deselect a field highlight the field and move it to the left hand side of the form.
Any amendments made to the fields will require the Web User Export function to be run.

Enquiry List Maintenance

The Enquiry List Maintenance option allows the administrator to configure Register Enquiry Lists that are to be available in ePathway. Only those Registers that were selected in Register Maintenance will be available for selection.
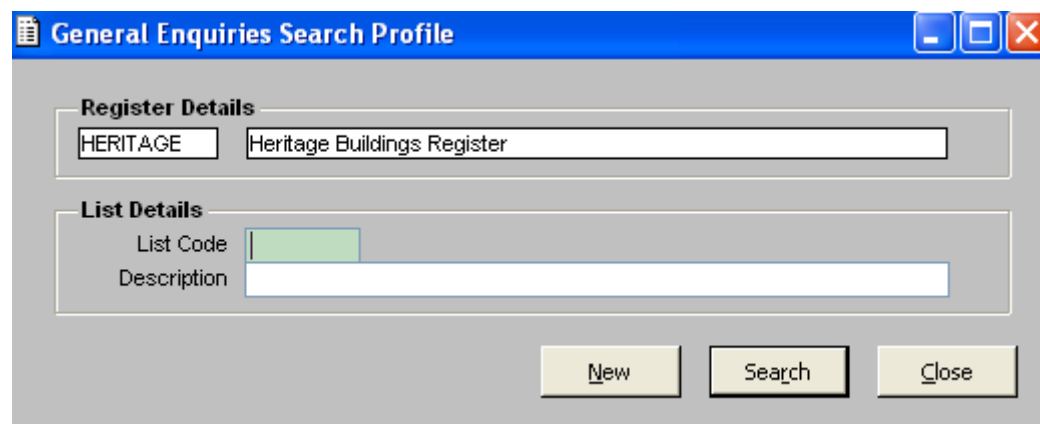
Registers Pop Up form

Once a Register Type is selected, a search profile is made available allowing an administrator to find any existing Register Enquiry Lists.

Either an Enquiry List Selection screen or an Enquiry List Maintenance screen will appear depending on whether there is one or multiple matching Enquiry Lists for a given Register Type.

The council administrator will be able to use the General Enquiry List Maintenance screen to configure the display and search criteria for a Register List. For example,

General Enquiry List Maintenance - List Details

The List Code and Description are editable, as is an 'Active' flag which will determine whether or not the List is exported to ePathway. It should be noted that councils may define multiple General Enquiry Lists for the same Register Type. For example, a council may wish to define a Heritage Housing Register list for all 'BUNGALOW' style houses as well as a similar Register list for all 'VICTORIAN' style houses.

General Enquiry List Maintenance - Searching

Councils may define Lists that are very broad and contain many records or a narrow List that would typically contain very few records. For this reason, it is desirable to be able to customise whether the Web User is pre-emptively presented with a search page prior to the List. For example, the search page may not be required for a narrow List, but required for a broad List.

The following options are available within the Searching section of this screen.

> Display Search Page before List (Pre-emptive Search Page)
> This option can be used to set whether the Search Page appears prior to the Enquiry List being displayed or whether it is bypassed.
> Show Search Button on List
> If this parameter is checked on, the List Display will include a Search button at the bottom of the screen. When the Web User clicks this button, they will be presented

with the Register Search Page to enable them to re-define the selection criteria. This option is independent of whether the Search Page is displayed pre-emptively or not.

General Enquiry List Maintenance - Display Options – Detail Page

If Emails are to be made available to the Web User then council can define whether the Emails are to be sent to a nominated ePathway Contact and / or the Primary Responsible Officer (for the Register List). The selected ePathway Contact will display in the field below the flag for the Email ePathway Contact. The ePathway Contact can be selected by using the Detail option beside the display field.

Note: If the Email option is flagged OFF then the Email option will not available within the ePathway Detail Page for the Register record within this Enquiry List.

General Enquiry List Maintenance - Selection Criteria

The Selection Criteria is simply a list of the fields that were selected for this Register Type (see previous section 'Register Field Allocation'). These fields may be configured at an administrator level in order to *always* filter the register's content based on the Enquiry List profile. This is, the administrator can enter values in these fields (e.g. BUNGALOW for the House Style) and this will imply that ePathway will only ever display 'BUNGALOW' style houses for this Enquiry List.

Register Field validation will ensure that only valid data and data types may be entered within these fields. This implies that the rules defined for the Register within Pathway will control what may be entered.

The 'Search' flag will allow the administrator to determine which Register Fields ePathway will allow the Web User to filter on. For example, the Web User will be able to filter on a 'Current Value' range. It should be noted that the administrator may only define a 'range' for Date (i.e. Text Field Type with DATE validation) and Numeric fields.

If a Register Field has been entered (i.e. 'BUNGALOW' for House Style for example) by the administrator, the Search flag will be dimmed and non-editable. Alternatively, if the Search flag is set ON, then the Register Field will be dimmed and non-editable. These options are mutually exclusive however the Search flag will initially be defaulted to OFF. It should be noted that only 'Text' (including dates) and 'Numeric' Field Types may be defined (by administrator or Web User) as searchable fields.

The searching functionality outlined above will give council the flexibility to control what information is presented to Web Users and how much control they have in further refining Register data.

Register Module Links

Generally those Register Fields with a 'popup' button adjacent to them reflect Register Module Links. The above Heritage Housing example shows that both 'Property Address' and 'Name' module links are valid. If the 'Search' flag is switched ON for this type of field, ePathway allows for some system defined filtering. For example, the example Heritage Register List allows 'property' and 'owner' links. This implies that it is possible to configure the Register List so that the Web User is able to filter the Enquiry List based on these attributes. This equates to the 'upfront' Property Searching filters available within General Enquiry Applications however, here we have now extended this functionality to include 'Names'.

Note: Only Property and Name module link searches are available for the purposes of General Enquiry Registers. This implies that any other Register modules links will only be available for display (and not filtering) in ePathway. Furthermore, for ALL Register Module links, the administrator will not be able to enter a filter value in General Enquiry List Maintenance screen.

More information on the ePathway General Enquiry Registers search functionality will appear later in this document.

Customer Type Maintenance

The new ePathway 'General Enquiry Registers' function is now available for allocation to ePathway Web Users via the Customer Type Maintenance option.

System Administration -> Customer Profile -> Customer Type Maintenance

Customer Type Maintenance Form

Customer Type Functions Form

Furthermore, ePathway General Enquiry Registers 'Types' are also available for allocation. When the administrator 'right clicks' the allocated function and select 'Types' option, they will be presented with the option to nominate which Register Lists are to be available for this Customer Type. For example,

List Type Customer Function Type Maintenance Form

Customer Profile Function Maintenance

The function "ePathway General Enquiry - Registers" will now be available for allocation to a Web User via Customer Profile Parameters - Customer Profile Maintenance. It should be noted that if the Customer Type associated with the Customer profile record has the 'Auto Update Users' option set on, the new function will be automatically allocated and cannot be changed via this maintenance option.

The 'Type' option adjacent the function will show the Register Lists that have been assigned for this Web User.

ePathway Web Server Export

A new function 'ePathway General Enquiry - Registers' has been added to the ePathway Web Server Export Control process. This will allow for the relevant parameters to be exported to ePathway and therefore align with the Pathway parameter setup.

As with each of the ePathway functions, it is important that this process is run on a regular basis to export any new parameters that may be required.
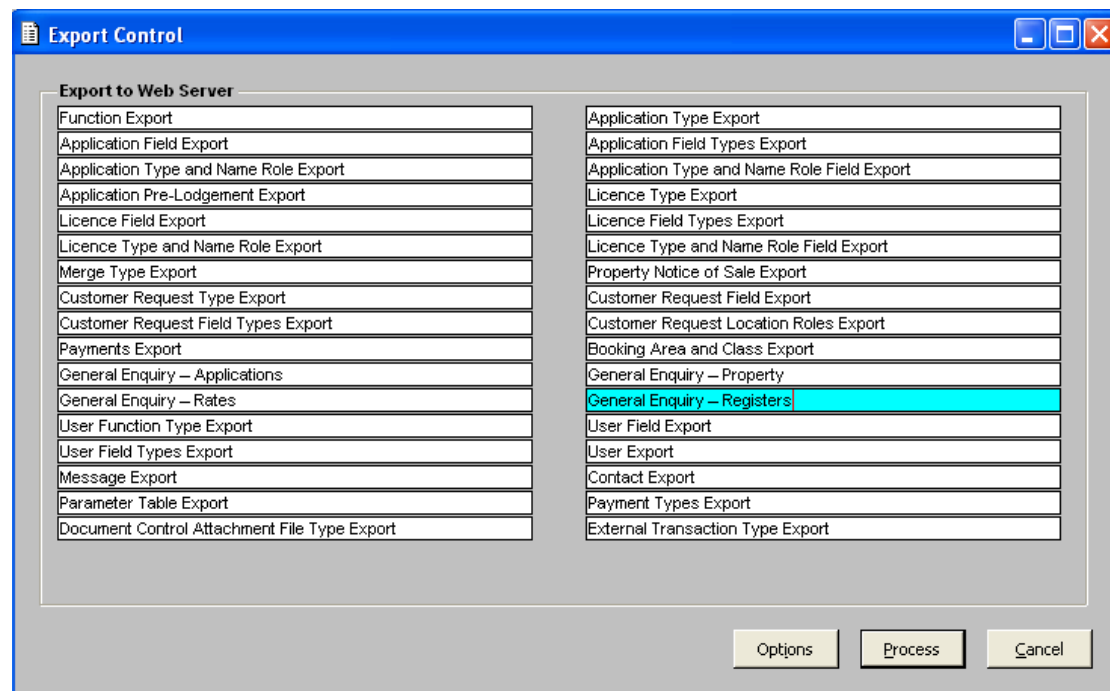
EPATHWAY PARAMETERS

Once an export has been run, ePathway is now ready for further configuration and processing.

Page Layout

The council may define the layout of the General Enquiry Register pages. Each Register Enquiry List has a defined set of fields and the council may customise the display of Register pages.

As per standard General Enquiry functionality there are two types of page to define. The first is the Summary View which will display multiple Register records, one per line. The council has the ability to select the fields that display on this page and in what sequence.

The second page is the Detail View which allows for the display of the additional details for each Register record (presented in the Summary View). The Page Layout option allows the council to group and sequence the fields, override labels and provide user-defined text descriptions for each field and field grouping. Each Register Enquiry List may have a different page layout.

For example,

Summary View

When the Summary layout link is clicked, the layout pages for that summary list will be displayed. For example,

Summary Views can be created by selecting fields from the 'exported' Register Enquiry List fields. Column Sequence and width are customisable and the initial sort order can also be set.

The resulting Summary View for the previous example might appear as shown below.

3 of 4: Summary View

Heritage Housing Register (BUNGALOW)

Listed below are the results for the enquiry that you requested. If available, you can click on the first column to display the details for that entry.

Year Built	House Style	House Name
1939	Bungalow	The Villa
1956	Bungalow	The Castle
1930	Bungalow	The Hacienda
1920	Bungalow	La Casa
1945	Bungalow	Big Brother House
1930	Bungalow	Casa Mia
1939	Bungalow	The Villa
1920	Bungalow	Leon
1945	Bungalow	John
1930	Bungalow	Wangaratta
1939	Bungalow	Tudorama
1920	Bungalow	House of Chow
1844	Bungalow	Jacinta
1939	Bungalow	Jack's House
1939	Bungalow	Home
1939	Bungalow	Home Sweet Home

Page 1 of 2

1 ▶

Detail View

The Detail View displays information for a single Register record and information can be presented with 'user defined' headings. The configuration Detail link to the right of the Enquiry List definition within Page Layout parameters will allow access to the screen below.

Enquiry List Page Group Layout
This page defines layout for your selected Enquiry List Page Group:
Module: CRS Pathway Module
List: Heritage Housing Register (BUNGALOW) (Detail)
Group: House Info
Add Fields: ⦿ All Fields ◯ Remaining Fields only

Seq.	Field Label	Label O'ride	Data Type	Width	Hover Text	Alignment	Wrap/Height	Same Row	Omit Null	Boolean Display	Delete
1	House Name	☐	String	200		Left	☐	☐	☐		☐
2	Address(Memo)	☐	Memo	200		Left	☐	☐	☐		☐
3	Current Value	☐	Double	200		Left		☐	☐		☐
4	Year Built	☐	Integer	200		Left		☐	☐		☐
5	Frontage (metres)	☐	Double	200		Left		☐	☐		☐
6	Roof Type	☐	ListMulti	200		Left		☐	☐		☐
7	Roof Material	☐	ListMulti	200		Left		☐	☐		☐
8	Purchase Price	☐	Double	300		Left		☐	☐		☐
9	House Style	☐	ListMulti	200		Left		☐	☐		☐
10	Heritage Papers	☐	String	200		Left	☐	☐	☐		☐
11	Heritage Certif. Issued	☐	String	200		Left	☐	☐	☐		☐

The resulting Detail View for the previous example will appear as shown below.

Much of the standard functionality contained within the other General Enquiry Modules (i.e. General Enquiry Applications, Property & Rates) is available when constructing Summary and Detail views for General Enquiry Registers. For example, the concept of a 'placeholder' will allow a council to include a variety of information within the Register. As a result of these features, a considerable amount of flexibility in terms of layout and design is available.

If a detail field of Field Type 'Text' happens to contain a web site address (e.g. www.realestate.com), ePathway will render it as a hyperlink and subsequently will allow the Web User to click on this field and be directed to the web relevant page.

GENERAL ENQUIRY REGISTERS

If the Web User (whether 'Public' or 'Registered') has access to multiple Register Enquiry Lists, a Select Enquiry List page will be displayed allowing them to select which list they want to view.

If the Web User has access to only one Register Enquiry List, (or accessed the list directly via the External Request Broker) then the Select Enquiry List page will be skipped and the Web User will be presented directly with the Enquiry List (or that Enquiry List's upfront search page if relevant – see later in the document for details).

The ePathway General Enquiry Register List will initially be displayed in a Summary View. Each Register record will be displayed on a single line, with the fields and their sequence as defined in the administration Page Layout. For example,

The number of records displayed in the list will be determined by a system parameter. If more records exist than can be displayed on the page then a page count will be displayed on the page and a previous/next page link will appear beneath the list, allowing the Web User to page through the result set.

A hyperlink on each record (i.e. on the first field) will allow the Web User to drill down into a Register Details page.

The Register Details page will show the detail fields for a particular Register record. The layout, sequence, labels and grouping of the fields will have been defined within administration Page Layout.

Images

A Register record may contain an image (e.g. a photo). A glyph (e.g. a camera) will be used to represent the image and the Web User will need to click on the glyph to view the image.

Note: Only common file extensions known to the browser will be supported. For example, bmp, jpeg, etc

Document Links

Register records in Pathway may have documents linked. When a Register Detail page is displayed the document file name will be retrieved from Pathway and a document link glyph will be displayed. When the Web User clicks the link, a request will be made to Pathway to transfer the document to the web server and this document will be then be displayed.
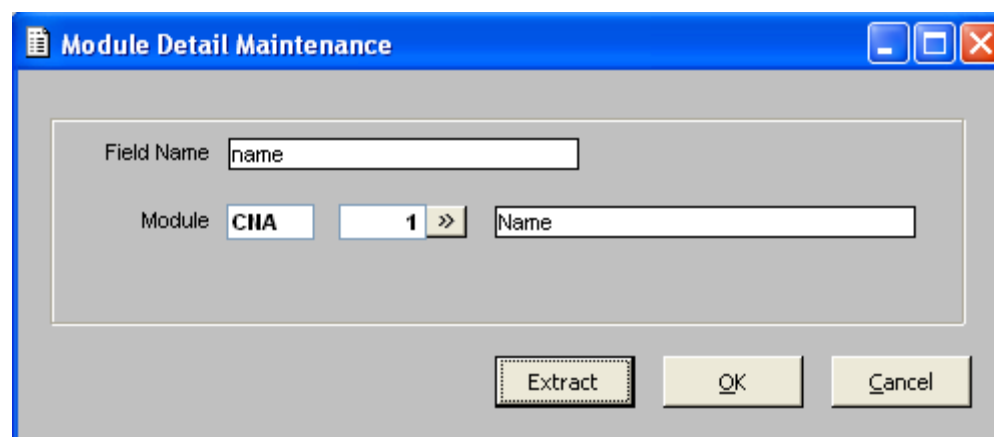
Note: Only common file extensions known to the browser will be supported. For example, pdf, doc, .txt

Names Details and Security

Council is ultimately responsible for the Names information that may appear within a Registers Enquiry List. If a council wishes to not display any Names (Register Module link) information they can achieve this by simply not selecting the Names Module fields in the Pathway General Enquiry Register parameters.

Alternatively, the Pathway Names module has the ability to flag persons as 'private' and in these circumstances the name will not be displayed in ePathway. For example, something like **NAME IS PRIVATE** will appear in ePathway. This is standard functionality for each of the existing General Enquiry modules.

A council is able to nominate which Names fields they wish to appear within the Register display. This is based upon the standard Registers functionality whereby the administrator nominates the 'Extract' fields. For example, the council may wish to provide Name details but not address details for a particular Register. This can be done from within Register Field Maintenance -> Module Link (CNA) and clicking the 'Extract' button:

The result of the above Extract definition is that a Memo field will appear in ePathway containing the 'Title' and 'Name'. The same principles apply to Property module links. See previous Detail View screenshot for an example of this.

Stake Holders and Security

As with existing General Enquiry modules (e.g. General Enquiry Applications), a 'Secure' flag is available on the Page Layout fields (Summary and Detail Pages). This flag controls whether or not we display or hide field data for a stakeholder. For example, if the 'Secure' flag is ON for a particular field (e.g. Capital Valuation for a property), then only a registered Web User who has a Names role link to the Register record (e.g. the property owner) would see this information.

Search Page

Depending on the parameter configuration settings for the particular Enquiry List, the Web User will either see the list immediately or will first be presented with a search page into which they may enter search criteria.

In the case of General Enquiry Registers this search page allows for filtering by any of the register 'Search' fields (flagged in Pathway Enquiry List parameters) as well as the standard Property related searches if relevant to this Register Enquiry List. In addition to this, a new Names search filter may be available if appropriate for the particular Enquiry List. This is an extension upon what is already provided for General Enquiry Applications which only allows for Property related search options.

The following configuration screen allows council to nominate the Register Fields, Property and/or Name Search options which may be available to the administrator and subsequently the Web User.

ePathway -> Layout –> General Enquiry Search

The new Name Search option simply contains Surname/Company and Given Names as the available search fields. The Title, Address, Parcel Search, Valuer General and GIS Search are also available as per standard General Enquiry Applications.

The 'User Defined Search' option contains all of the nominated Register Enquiry List fields flagged as 'Search' fields by the Pathway administrator (e.g. Current Value).
The User Defined search option will allow the administrator to configure the 'Fields' (via hyperlink) and subsequently, User Text and Sequence may be defined. For example,

The General Enquiry Search option configuration will only be available for a Register Enquiry List if Search Criteria configured in Pathway allow for it. This is, the Search flag must have been set ON for either the field or module link field for it to be available here. For example, if no Register Fields were flagged as 'Search' fields, then this option would not be available. Similarly, if a Register Enquiry List had no Property Link, then the Title, Address and Parcel search options would not be available.

An example of what the Web User would be presented with for the above General Enquiry Search configuration would be the following:

Clicking on the 'Search' button above would invoke an 'open search' across all records for the Register List. If a Web User enters details into the profile fields, this will obviously refine the result set.

Payments Parameters

The following topics are covered in this section:

Payments System Parameters

Receipting System Parameter Maintenance Form

Receipting System Parameter Maintenance form

Drawer ID

Use the Popup option to select the Drawer ID that will be used when a payment is made via ePathway. The Drawer will be used to accept and process all payments made via ePathway Payments and My Accounts.

Note: It is important that this draw is reconciled on a regular basis.

Cashier Name

Use the Popup to select the Cashier ID that will be use when a payment is made via ePathway. The Cashier ID will be used to accept and process all payments made via ePathway Payments and My Accounts.

Payment Group

Use the Pop Up to select the Payment Group that will be used when a payment is made via ePathway. [For sites wishing to collect Merchant Service Fees via ePathway, they must now nominate a Payment Group rather than a Payment Type. This allows a Council to have multiple Payment Types (i.e. Card Types) available within ePathway.]

A Detail button allows access to the Payment Types which form part of the selected Payment Group. These details are for information purposes only and cannot be maintained from this form.

Next Reference

This is a System Generated sequential number, that is updated every time a Bank Deposit listing is run for the nominated ePathway Drawer ID. It is used as the Bank Reference for each payment transaction and is prefixed by EP.

Select User Payment Types

Selecting this button allows the Payment Module Types to be allocated to Users. If this parameter is checked ON, Users and Customer Types must have Payment Module Types allocated, if it is OFF, ALL Payment Module Types will be available.

Display Cashier Warning
A 'Display Cashier Warnings' flag has now been introduced to the Receipting System Parameters.

Previously, Cashier Warnings were only ever displayed to the user in an email following a payment. Furthermore, Cashier Errors were displayed using a standard/non-specific Receipting Error message on the Payment Edit/Submit screen.

If the new 'Display Cashier Warnings' flag is switched ON, ePathway will report the actual Cashier Warning messages on the Confirm Payment screen. Conversely, if the new 'Display Cashier Warnings' flag is switched OFF, existing functionality will be maintained.

In addition to this, if the new 'Display Cashier Warnings' flag is switched ON, ePathway will report the actual Cashier Errors on the Payment Entry screen. Alternatively, if the new 'Display Cashier Warnings' flag is switched OFF, a standard/non-specific Receipting Error message will be displayed on the Payment Entry screen.

Note: As mentioned earlier, Cashier Errors were always reported on the Edit/Submit screen however this validation now takes place at the time of payment entry irrespective of the 'Display Cashier Warnings' setting. It should also be noted that once a Cashier (or other Receipting) Error is experienced, the user will not be able to proceed with the payment.

Setup
In order for the actual Cashier Warnings/Errors to be available to appear in ePathway, a Web Export of the Messages will need to run. For example,
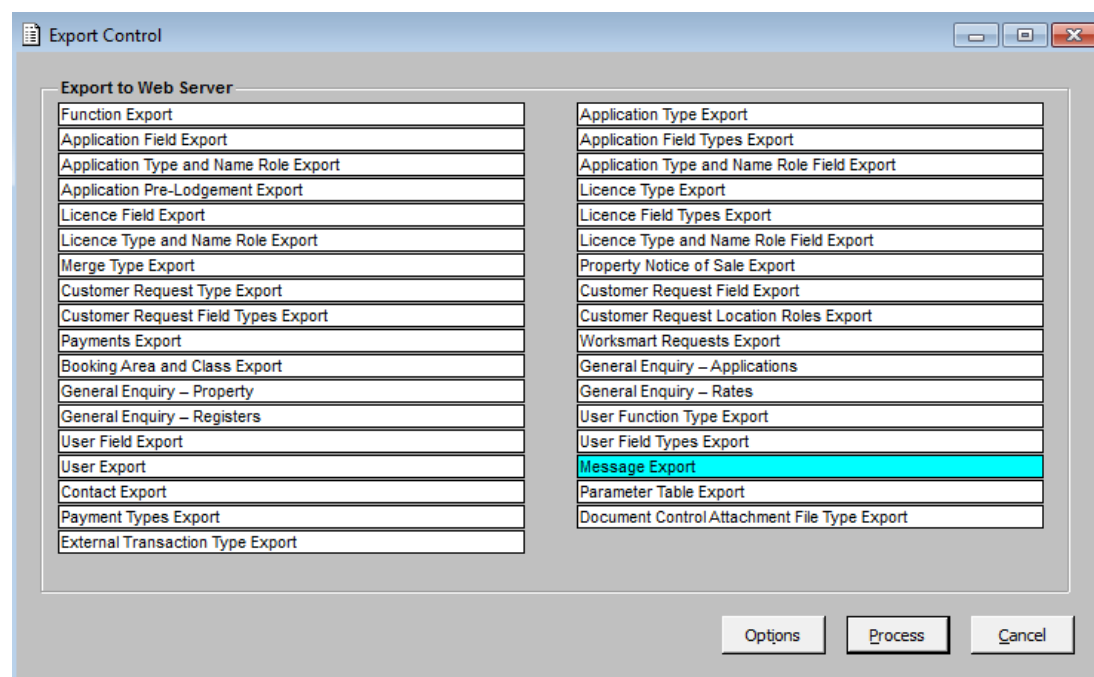
Note: The 'Display Cashier Warnings' flag will need to be switched ON prior to running the web export.

Consider the following Rates Cashier Warnings:

Working Examples of ePathway Payments

A) Cashier Warning applicable and 'Display Cashier Warnings' flag is switched ON

Pathway Assessment (#11) with Cashier Warning

B) Cashier Error applicable and 'Display Cashier Warnings' flag is switched ON

Pathway Assessment (#14) with Cashier Error

C) **Cashier Warning applicable and 'Display Cashier Warnings' flag is switched OFF**

Note: If the 'Display Cashier Warning' flag is OFF and there is a Cashier Warning, the email to the user will contain the Cashier Warning but nothing will be reported in ePathway (i.e. existing functionality).

D) Cashier Error applicable and 'Display Cashier Warnings' flag is switched OFF

MSF Control
A system level parameter (specific to ePathway) is now available (as of Release 3.05) to allow sites to optionally enable the enhanced 'MSF Control' functionality. This parameter enables the 'class/type level' MSF control functionality and determines whether or not the transaction (type/class) level parameters are available or not.

See further details under Merchant Service Fee Control.

Payment Fields Maintenance

Payment Fields Maintenance Form

Payment Fields Maintenance Form

XML Tag Name/Description
These fields shows the XML tag Name and description for the field.

XML Tag Type
This field shows the type of data that the field may contain.

Maximum Size
This field shows the maximum field size that is allowed for this field.

Entity
This field shows the entity name if one is used for this XML tag.

List Form
This field shows the list form if one is used for this XML tag.

Active Indicator
If this field is set on then the field is active and able to be used.

Values Button
This field is currently not in use.

Payment Module Maintenance

Payment Module Maintenance Form

Payment Module Maintenance form

Payment Module
This is the list of Authorised ePathway Payment modules. Any module flagged as 'Active' can be exported to ePathway for Page Setup and activation. This then allows web customers to pay the charges via selected payment gateways.

Active Indicator
This field allows you to set the payment module as 'Active' or 'In-Active'. If this option is changed, a ePathway Web Server Export must be performed to update ePathway.

Types
Select this option to select type and field level data elements to be exported to ePathway.

Payment Types Maintenance Form

NOTE: The Payable heading and 'Detail Out' button will only appear for Infringement and Animal Payments.

This form allows you to select from the list of Available Types. The selection will vary depending on the Payment Module select. For example:

The Infringements Module allows for selection at Infringement Type level.

Payment Type Maintenance – Infringements Module

Use the Select/Remove options to assign / de-assign payment types.

The Animals Module also has the Payable button available.

Payment Type Maintenance – Animal Registration Module

Selecting the Payable option will display the Payable Status Maintenance form.

Payments Module
The description of the Pathway module.

Available Types
This is the list of payment types that may be selected and presented to the customer on the ePathway Payments menu option.

Note : Only the Infringements and Animals modules allowed for multiple payment types.

Selected Types
The list of Payment types that have been assigned and may be exported to ePathway.

Fields
Select this option to assign the fields for the payment type that will appear on the ePathway Payments screen.

Disable MSF
Select this option to not include a Merchant Service Fee component when paying for the Infringement.

If this field is left blank and Council are using the Merchant Service Fee functionality an additional charge is added to the payment to cover the MSF fee.

Payable Status Maintenance Form

The Payable Status Maintenance Form allows for the selection of which statuses are allowed to be paid via ePathway.

Payable Status Maintenance – Infringements Module

Payable Status Maintenance – Animal Registration Module

A Status Message must be entered when the Allow Payment flag is turned OFF. Note that any changes made to the Status Messages in Pathway will require the information to be re-exported to ePathway. Once exported an override for the message can be added via the Module Message Text option within ePathway.

If the Allow Payment flag is turned OFF for the status 'Not Registered in Previous Period' then renewal payments via ePathway will not be allowed for Animals not registered in the immediately previous registration period. In this case the entered status message will be displayed to the user and payment will not proceed.

If the Allow Payment flag is turned ON for the status 'Not Registered in Previous Period' then renewal payments via ePathway will be allowed for Animals not registered in the immediately previous registration period. If the animal type parameter 'Allow Renewal for Unregistered Animals' is OFF the registration will be changed to a 'New' registration otherwise the registration will remain as a 'Renewal'.

Status
These columns show the status Codes and Descriptions that may be used within the Infringement process or Animal Payments process.

Allow Payment
This column is used to indicate whether an infringement which has this status applied is allowed to be paid via ePathway.

In Animal Payments, if the Allow Payment flag is turned OFF for the status 'Not Registered in Previous Period' then renewal payments via ePathway will not be allowed for Animals not registered in the immediately previous registration period. In this case the entered status message will be displayed to the user and payment will not proceed.

In animal Payments, if the Allow Payment flag is turned ON for the status 'Not Registered in Previous Period' then renewal payments via ePathway will be allowed for Animals not registered in the immediately previous registration period. If the animal type parameter 'Allow Renewal for Unregistered Animals' is OFF the registration will be changed to a 'New' registration otherwise the registration will remain as a 'Renewal'.

Status Message
This column allows the user to add in a Status Message which is displayed within ePathway when the infringement is paid or attempted to be paid.

If the 'Allow Payment' option is set off then a Status Message must be entered otherwise the Status Message can be left blank if desired.

Type Fields Maintenance Form

The Type Fields Maintenance form allows fields to be selected for display in the ePathway Payments module.

Three new payment fields will now be available within ePathway (as of Release 3.04). Specifically, a "Property Address' field may now be displayed for a Rates payment (i.e. Rates/Water/Trade Waste) and both 'Current Contact" and "Offence Location" may now be displayed for all of the Infringement Type payments.

To utilise these new fields, a council may configure these fields initially within Pathway and then subsequently within ePathway.

PATHWAY -> System Administration -> ePathway -> Payments Parameters -> Payments Module Maintenance

The 'Property Address' field is display only and neither this flag nor the corresponding 'Mandatory' flag can be maintained (i.e. they are always dimmed and non-editable). This feature is similar in the way in which the system 'Mandatory' field operates. 'Display Only' at a system level implies that a council is forced to utilise this field in display only mode. Conversely a council may define any other payment fields as 'Display Only' assuming they are not mandatory.

Type Fields Maintenance Form

Note: Rates payments will also include this payment field.

Similarly, all of the Infringement Payment Types will now allow for the new fields, 'Offence Location' and 'Current Contact'. For example, an Animal Infringement,

Once these Payment Type fields have been configured it is important that an 'ePathway Web server' export is run in order to pass this information to ePathway. The 'Payments Export' option is to be selected for this process.

Within ePathway, a system administrator now has these new fields available. For example, within 'Page Layout' Fields for an Animal Infringement, both 'Offence Location' and 'Current Contact' are now available. For example,

Note: These fields are both display only and of 'string' data type. The 'Display Only' flag is set according to the Pathway configuration and therefore cannot be edited (i.e. dimmed). Once these fields are configured, the administrator should save these and reload the configuration cache.

As a result of the above configuration, the payment pages for an Animal Infringement will now be represented as follows:

The 'Offence Location' is now displayed on the Payment Confirmation screen. The 'Current Contact' does not exist and therefore '***NOT AVAILABLE***' appears.

Note: The '***NOT AVAILABLE***' message will also appear in the case whereby a name is flagged in Pathway as 'private'.

An example of the new 'Property Address' field for a Rates or Trade Waste payment may be seen below:

Payment Type
The description of the Pathway module.

Available Fields
A list of fields that can be assigned will be displayed. Use the Select/Remove buttons to assign the fields that will be exported to ePathway. The selected fields can be arranged on the ePathway Payments page, by using the ePathway Page Layout option.

Note : Some fields are System Mandatory and cannot be de-assigned. They are required as the base input fields for the ePathway Payment function. All other fields are optional.

Selected Fields
Displays the list of fields that will be exported to ePathway for inclusion on the ePathway Payments screen.

Mandatory Indicator
Note : Some fields are System Mandatory and cannot be de-assigned. They are required as the base input fields for the ePathway Payment function. All other fields are optional.

Other fields can be set as Mandatory if required.

Display Only Flag
If this flag is set on, the data related to this field will be presented to the customer, but cannot be changed. For example, you may want to show the customers Outstanding Balance, but not allow them to override the amount.

My Accounts Module Parameters

My Accounts Module Maintenance Form

This parameter allows council to define which modules will be available for Payment through the ePathway 'My Accounts' Function. Using the move buttons in the middle of the form, move the required Modules to the right of screen.

The Payable checkbox indicates that this Module will be available for payment within ePathway. The Payable indicator will default to ON, but may be checked OFF.

My Accounts Module Maintenance form

Available Modules
A list of Pathway Modules available for payment via the My Accounts function. Use the Select/Remove buttons to assign / de-assign any module.

Selected Modules
A list of Pathway Modules that can be paid via the ePathway My Accounts function.

Payable Indicator
Indicates whether the module will accept payment or is for enquiry purposes only.

Card Types

Note: This enhancement is a spin-off from the development done for the authorised function, 'Merchant Fee - External & ePathway' in Release 3.03. A bulletin (i.e. 'ePathway Payment Gateway') was sent out (13-JUN-2008) advising sites of this course of action.

To allow for upfront Card Number Validation and the flexibility of multiple Payment Types (and hence multiple MSF rates), it was necessary to re-design the Card Types Maintenance screen. Within System Parameters, Card Types Maintenance now consists of the following features:

- System defined Card Types (initial data and non-configurable e.g. VISA)

- User-definable Card Type descriptions

- An Identifier field used to map an ePathway Card Type to a Payment Gateway Card Type in the situation where a Payment Gateway requires a Card Type to be passed. This basically replaces the previously existing functionality whereby Card Types were defined by council against the 'EPATH' Payment Type (initial data).

  Note: Currently this field will be relevant to CommWEB (DPS) sites only – and these sites will be required to set up these Identifiers immediately following the Release 0303 deployment. For example, the CommWEB Gateway may expect 'VS' in the case of a VISA credit card type – therefore 'VS' will be required within this identifier field.

The ePathway System Administrator will be able to access the Card Types screen via Configuration >> System Parameters >> *Card Types (hyperlink)*

This page displays all Credit Card Types available in ePathway. An administrator may update the Description and Active fields.
Note: Some Payment Gateways require the Card Type therefore the purpose of the Identifier field is to represent what is actually sent to the Payment Gateway for each Card Type. (Please refer to your Payment Gateway documentation).
Note: Payment Type is only relevant to sites authorised to apply Merchant Service Fees.

Card Type	Description	Identifier	Active
AMEX	Amex Card		☑
BANKCARD	Bank Card		☐
DINERS	Diners Card		☑
MASTERCARD	Master Card		☑
VISA	Visa Card		☑

Save   Cancel

The system defined Card Types above will be used for Card Number Validation (and where relevant) Identifier mapping. See Card Number Validation section for more details on this.

ePathway Processing

As per standard functionality, a customer will initiate and lodge an ePathway transaction (e.g. a Property Certificate). As one of the final stages of this transaction, the customer will be prompted to enter payment details (e.g. Card Number & Expiry Date) into the Payment Entry screen.

Card Number Validation

The Payment Gateway will (as always) determine Card Type based upon the Card Number passed. However, ePathway will now use the Card Number entered (by a user) to do some initial validation prior to invoking the Pathway Gateway. Specifically, the Card Number will be checked to see if it is valid and if it is not, an error message will be presented to the user. This will in effect prevent invalid Card Numbers from being passed to the Payment Gateway.

Previously, some Payment Gateways required that ePathway prompted for Card Type as the first step in Payment Entry. Due to this enhancement, it is now unnecessary to prompt a user for Card Type as ePathway will now determine the Card Type based on the Card Number.

NOTE: An exception to this is the uTransact Payment Gateway which will still prompt for Card Type prior to invoking the Payment Gateway. In this case the payment entry and validation take place externally within the Payment Gateway itself.

Once the Pay button is clicked, standard processing will invoke the Payment Gateway and subsequently Pathway. Once the payment has been accepted via the Payment Gateway advising that funds have been transferred to the Council's Banking Account, Pathway will then process the Payment Amount.

Merchant Service Fee – ePathway

EPATHWAY RECEIPTING

Pathway Parameters

As with External Receipting ePathway Receipting/Payments did allow for Merchant Service Fees to be calculated. To allow for this to occur, several changes have been made within ePathway and Pathway.

If Councils wish to apply differing Merchant Service Fees (for each credit card they allow to be used when making a payment), a method of identifying which credit card attracts what % Merchant Service Amount was required.

The ePathway System Parameter Maintenance screen has been amended (see System Administration >> ePathway >> Payments Parameters >> Payments System Parameters). For sites wishing to now collect Merchant Service Fees via ePathway, they must now nominate a Payment Group (rather than a Payment Type as it was previously). This allows a Council to have multiple Payment Types (i.e. Card Types) available within ePathway.

Once a Payment Group is nominated, a Payment Types detail button will be available and all of the Types relevant to the Group will be accessible. The following screen displays all of the Payment Types (for the relevant Group) as they are seen from the Pathway Parameter menu >> Receipting >> Receipting Parameters >> Payment Group Filter >> Payment Types. This Payment Types screen displays various details including the MSF rate applicable.

Once the required Payment Group/Types are defined for ePathway, these are to be exported to ePathway as part of the standard Payment Export function. See below:
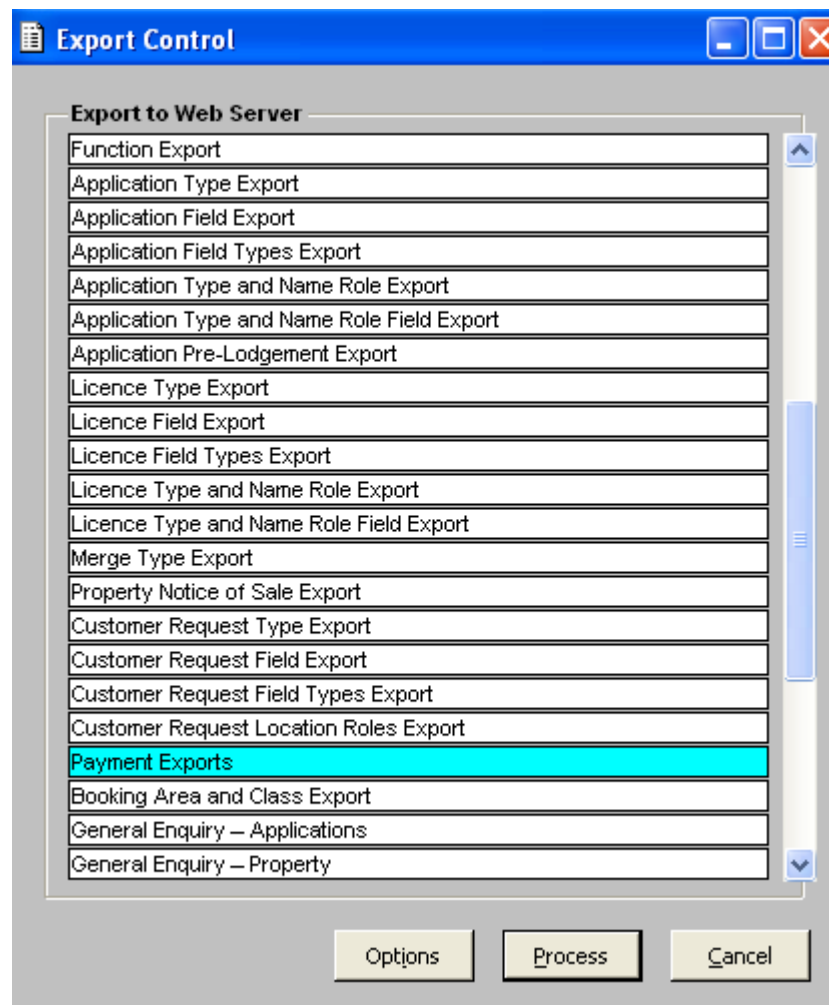
ePathway Parameters

To allow the flexibility of multiple Payment Types (and hence multiple MSF rates), it was necessary to re-design the Card Types Maintenance screen. Within System Parameters, Card Types Maintenance consists of the following features:

- System defined Card Types (non-configurable e.g. VISA)

- User definable Card Type descriptions

- An Identifier field used to map an ePathway Card Type to a Payment Gateway Card Type in the situation where a Payment Gateway requires a Card Type to be passed. This basically replaces the previously existing functionality whereby Card Types were defined by council against the 'EPATH' Payment Type (initial data).

  Note: Currently this field will be relevant to CommWEB (DPS) sites only – and these sites will be required to set up these Identifiers immediately following the Release 0303 deployment. For example, the CommWEB Gateway may expect 'VS' in the case of a VISA credit card type – therefore 'VS' will be required within this identifier field.

- Payment Type dropdown available to map Pathway Payment Types (which are imported from Pathway) to ePathway Card Types. **Sites will be required**

to set these up immediately following Release 0303 deployment. These are mandatory and ePathway Payments will not be supported otherwise.

The ePathway System Administrator will be able to access the Card Types screen via Configuration >> System Parameters >> *Card Types (hyperlink)*

This page displays all Credit Card Types available in ePathway. An administrator may update the Description and Active fields. Note: Some Payment Gateways require the Card Type therefore the purpose of the Identifier field is to represent what is actually sent to the Payment Gateway for each Card Type. (Please refer to your Payment Gateway documentation). Note: Payment Type is only relevant to sites authorised to apply Merchant Service Fees.

Card Type

Card Type	Description	Identifier	Payment Type	Active
AMEX	Amex Card		Amex Card	☑
BANKCARD	Bank Card		Bank Card	☐
DINERS	Diners Card		Diners Card	☑
MASTERCARD	Master Card		Master Card	☑
VISA	Visa Card		Visa Card	☑

Save   Cancel

The above Card Types will be used for both Card Number validation and subsequently the calculation of MSF. See Card Number Validation section for more details on this.

ePathway Processing

As per standard functionality, a customer will initiate and lodge an ePathway transaction (e.g. an Application or Certificate). As one of the final stages of this transaction, the customer will be prompted to enter details into the Payment Entry screen. Once a customer has entered their Card Number (and leaves this field - to update the Card Expiry Date for example) the Merchant Service Fee calculation will take place and will be displayed as follows:

Please enter your Credit Card details below, and then click the "Pay" button to process your payment.

Card Number *   4000000000000000
Expiry Month   01
Expiry Year   2008
Payment Amount $251.00   *(please note the above payment includes a $2.00 merchant fee)*
Reference   CR-1257

Pay

Note: If no Merchant Service Fee is required to be charged then the screen will remain the same.

Card Number Validation

The Payment Gateway will (as always) determine Card Type based upon the Card Number passed. However, ePathway will now use the Card Number entered (by a user) to do some initial validation prior to invoking the Pathway Gateway. Specifically, the Card Number will be checked to see if it is valid and if it is not, an error message will be presented to the user. This will in effect prevent invalid Card Numbers from being passed to the Payment Gateway. If the Card Number is valid, the Payment Type relating to the Card Type will be used to determine the MSF rate applicable to the payment amount.

Previously, some Payment Gateways required that ePathway prompted for Card Type as the first step in Payment Entry. Due to this enhancement, it is now unnecessary to prompt a user for Card Type as ePathway will now determine the Card Type based on the Card Number.

NOTE: An exception to this is the uTransact Payment Gateway which will still prompt for Card Type prior to invoking the Payment Gateway. In this case the payment entry and validation take place externally within the Payment Gateway itself.

Once the Pay button is clicked, standard processing will invoke the Payment Gateway and subsequently Pathway. This is, once the payment has been accepted via the Payment Gateway advising that funds have been transferred to the Council's Banking Account, Pathway will then process the Payment Amount and Merchant Service Fee. If the fee being paid is taxable, the Merchant Service Fee will also potentially contain a taxable component.

Please see Taxation Calculations section above for more details.

Merchant Service Fee Control

There was a business requirement for ePathway to be able to conditionally charge a Merchant Service Fee (MSF) for credit card payments based on the specific type of transaction being paid. For example, a council may require MSF to be charged for Rates payments, but by contrast not be charged for Infringement payments.

ePathway (online) Payments / Lodgements
Two new parameters have been introduced to control which ePathway payments/lodgements are to attract MSF. These are:

1.   System Level (Receipting Parameter level)
2.   Transaction (Class/Type level – as applicable)

Note: It must be noted that these parameters apply purely to ePathway payments / lodgements and have no impact whatsoever on credit card transactions done directly via Pathway Receipt Entry.

The combination of these parameters will enable ePathway to conditionally charge a Merchant Service Fee (MSF) for credit card payments based on the specific type of transaction / lodgement being paid. For example, a council may wish not to charge MSF for Infringement payments, however for various other types of payments (e.g. Rates) MSF does need to be charged as per normal.
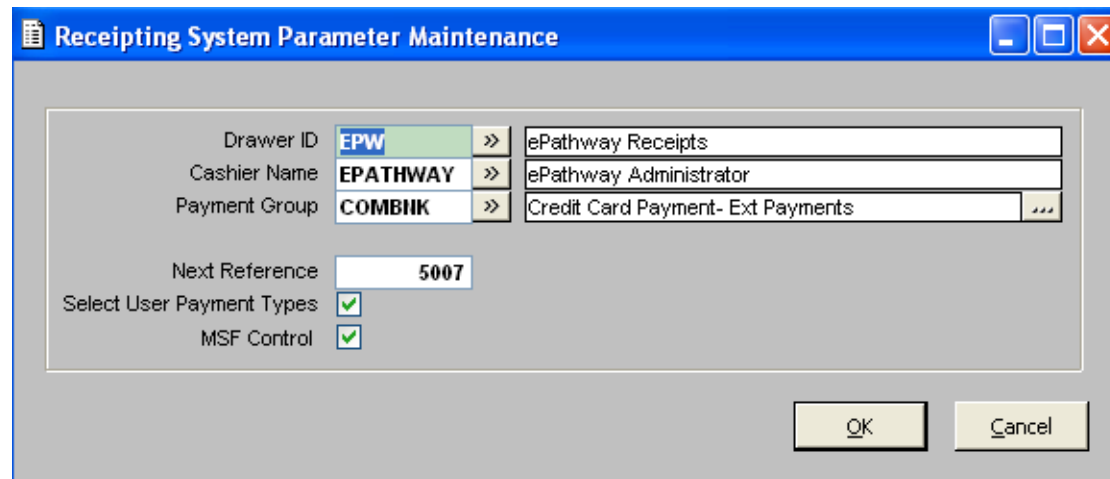
It must be noted that the fee rate (i.e. MSF rate) does not change based on the type of transaction being paid, but rather purely as to if the fee is applied (charged) or not.
The MSF fee rate charged is based purely on the type of credit card being used. For example payments via Visa might attract a 1% fee, whereas American Express by contrast might attract a higher fee (e.g. 1.5%). This functionality will remain unchanged.

"MSF Control" system parameter
A system level parameter (specific to ePathway) is now available to allow sites to optionally enable this enhanced "MSF Control" functionality. This parameter will ultimately enable this "class / type level" MSF control functionality and determine whether or not the transaction (type/class) level parameters are available or not.

This parameter has been added to the ePathway Receipting System Parameter Maintenance form in Pathway. For example,

System Administration -> ePathway -> System Parameters -> Receipting System Parameters
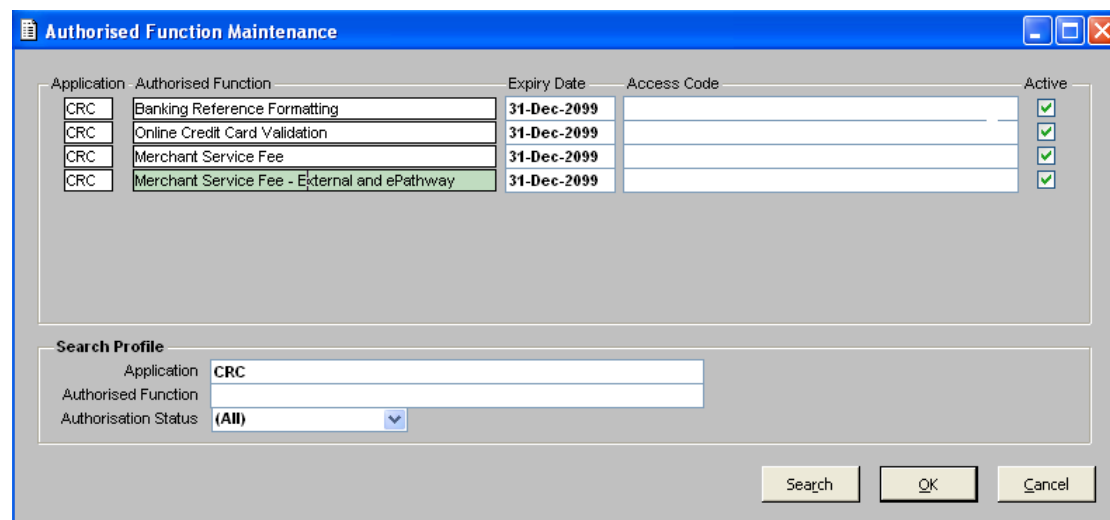
The 'MSF Control' parameter will initially be defaulted to OFF.

> Note: This new 'MSF Control' parameter will only be available if a council is authorised to the 'Merchant Service Fee – External and ePathway' Authorised function. For example,

"Disable MSF" type level parameter
A new "Disable MSF" parameter is now available to ePathway.

Firstly, by way of background, all ePathway transactions (only those payable by credit card are of relevance here) are based on a Class &/or Type structure (or the equivalent). For example, Applications and Licensing have one or more 'types' within a 'class'. Bookings by contrast only have 'classes' and Certificates only have 'types' (i.e. merge types). The Payments module is similar in that it has Receipting Applications (e.g. IF, RA, AP, LC etc) and in the case of IF (i.e. Infringements) that is further broken down into Infringement 'types' (e.g. Parking, Animal and Environmental etc).

For maximum flexibility, this new "Disable MSF" parameter has been provided at the lowest level of either 'class' or 'type' as applicable to the module. This means that different types of transactions within the same module can be configured differently. Using Payments as an example, all (or only some) Infringement types could be configured to charge MSF. For

example, if it became a requirement that MSF could be charged for Environmental Infringements but not for Parking or Animal Infringements then this scenario would be possible under this new functionality.

When the "Disable MSF" flag is on, it will prevent MSF being applied to those payment / receipt lines, otherwise MSF will be applied as per current standard functionality.

Payments

The "Disable MSF" parameter has been added to the Payment Type Maintenance screen for each selected Payment Type. Note that this is only visible when the MSF authorised function is enabled and the "MSF control" parameter has been enabled. This "Disable MSF" flag will initially default to OFF. This implies that for those specific incidents where a council wants to disable MSF, they may do so by checking this flag ON. For example,

System Administration -> ePathway -> Payment Parameters -> Payment Module Maintenance -> (Types button)

The same also applies to all other receipting modules – for example Licence payments (i.e. the new "Disable MSF" is available for the selected "Licence" receipting types). For example,

IMPORTANT : It is important to note that in relation to Payments the 'type' here is merely the payment type (i.e. paying a Licence) not the 'class/type' of the Licence itself – so therefore the "Disable MSF" parameter setting here applies to all Licence payments made via the Payments module, regardless of their class or type.

Licence Entry and Application Lodgement

The "Disable MSF" parameter is now available on the Licence Type Maintenance screen. Note that this is only visible when the MSF authorised function is enabled and the "MSF control" parameter has been enabled. This "Disable MSF" flag will initially default to OFF. For example,

System Administration -> ePathway -> Licence Entry Parameters -> Licence Class and Type Maintenance

Note: Since the 'type' is the actual class/type of the Licence, the "Disable MSF" setting will be specific to the selected type when paid by credit card during the lodgement process.

The same applies for Application Lodgement. For example,

System Administration -> ePathway -> Application Lodgement Parameters -> Application Class and Type Maintenance

Certificates

The "Disable MSF" parameter is now available on the Merge Type Maintenance screen for each selected Certificate Merge Type. Note that this is only visible when the MSF authorised function is enabled and the "MSF control" parameter has been enabled. This "Disable MSF" flag will initially default to OFF. For example,

System Administration -> ePathway -> Property Administration Parameters -> Certificate Request Parameters
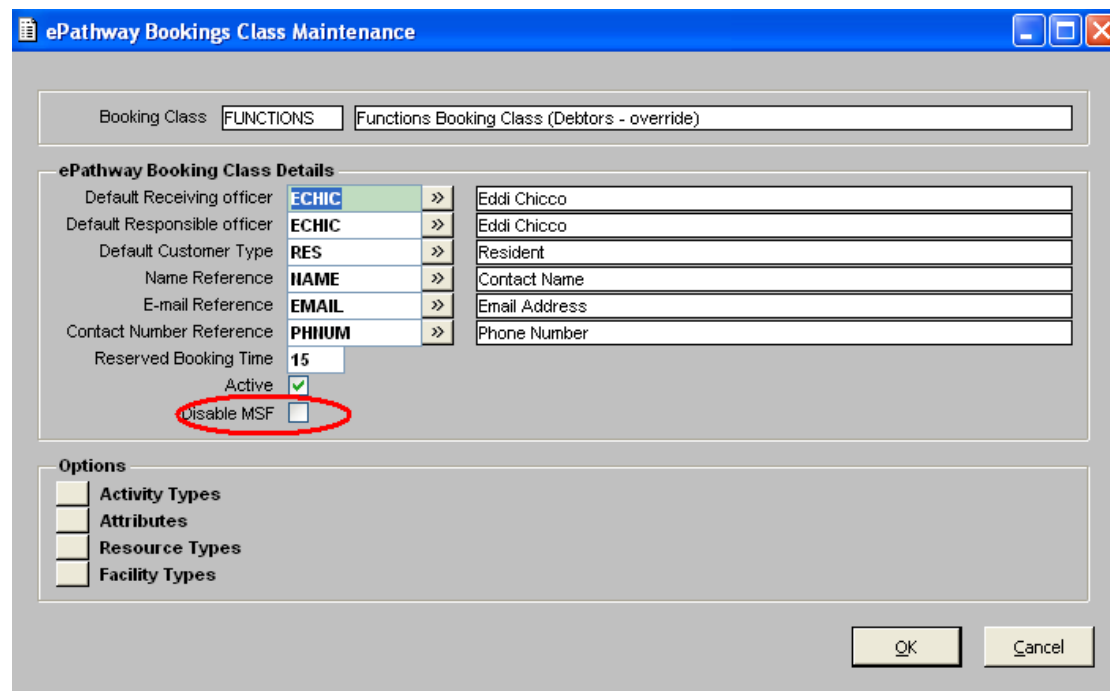
Bookings

The "Disable MSF" parameter is now available on the Booking Class Maintenance screen for each selected Booking Class. Note that this is only visible when the MSF authorised function is enabled and the "MSF control" parameter has been enabled. This "Disable MSF" flag will initially default to OFF. For example,

System Administration -> ePathway -> Bookings Management Parameters -> ePathway Booking Class Selection

Web Server Export
In order for the 'Disable MSF' parameters to be reflected in ePathway, an export must be run for each of the relevant Types/Classes. Specifically, where parameters have been updated, the following exports will need to be run in order to disable MSF for the appropriate types/classes:

- Application Type Export
- Licence Type Export
- Merge Type Export
- Payments Export
- Booking Area and Class Export

System Administration -> ePathway -> System Processing -> Web Server Export

Credit Card Payment Entry
At credit card entry / payment time – the MSF will be calculated based on only those types of payments / lodgements (as applicable) that were configured with their "Disable MSF" parameter off.

The MSF fee is shown on the credit card payment page – a typical example is as shown below (standard functionality).

Note: The MSF fee ($0.01 in the example below) is not physically calculated or displayed until the user has entered their credit card number on the web page. This is because the Card Number (specifically the Issuer Identification Number portion (IIN) being the first 6 digits) is used to derive the type of card (e.g. Visa or Amex), which in turn determines the MSF fee (based on the Pathway 'Payment Type' (e.g. "VS") that has been linked to that Card Type). If the user then keys a different card number then the calculation is repeated.

IVR Integration
Whilst the functionality described above will only control ePathway charging MSF for 'online' payments, the underlying components will be compatible through to the IVR implementation.

The IVR system requires its own "Disable MSF" style parameter to be able to flag which types of Payments need to have MSF applied versus not, and ideally that parameter will be able to be specified at the lowest (i.e. 'class / type') level for maximum flexibility and consistency / alignment with ePathway.

Specific to MSF, it would be expected that both the IVR and ePathway systems would be configured the same – although this is purely at the discretion of the council.
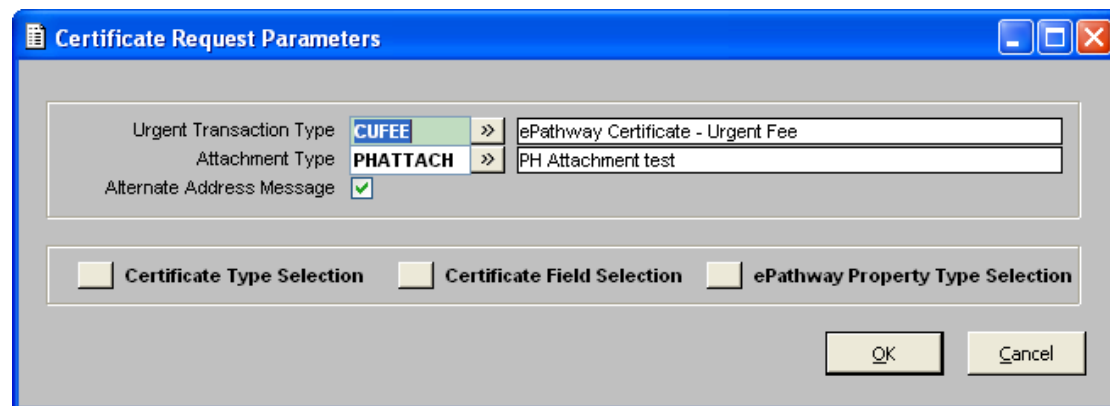
Property Administration Parameters

The following topic is covered in this section:

Notice of Sale Field Maintenance

Certificate Request Parameters

Certificate Request Parameters Form

This form allows the ePathway Administrator to assign the fields that will be exported to ePathway for a Certificate Request.

Certificate Request Parameters

Urgent Transaction Type

This field allows the ePathway Administrator to assign an 'Urgent Transaction Type' fee to the Certificate Requests. If a fee has been assigned and exported to ePathway it will appear as an optional checkbox on the ePathway Confirmation page. This enables the user to flag that a Certificate Request is urgent and inturn will be given high priority and incur the additional fee set in this field.

Attachment Type

This field allows the ePathway Administrator to assign the Attachment Type that will be used to select the appropriate type from the Paperclip Parameters. When an ePathway Certificate request is received with an attachment, the system will reference the Attachment Type setting and link the Attachment to the Property record.

Alternate Address Message

This check box when selected will result in a message being displayed on the ePathway Property Search screen informing the user that the property selection made is an alternative address.

Certificate Type Selection

This button when selected opens the 'Certificate Type Selection' form which allows the ePathway Administrator to assign and un-assign the Certificate Types that will be made available in ePathway.

Certificate Field Selection

This button when selected opens the 'Certificate Field Selection' form which allows the ePathway Administrator to assign and un-assign the fields that can be placed on the Certificate Details screen in ePathway.

ePathway Property Type Selection

This button when selected opens the 'Property Type Selection' form which allows the ePathway Administrator to assign and un-assign the Property Types that are allowed for ePathway.

Transaction Types Pop Up Form

This form allows the selection of the Urgent Transaction Type.

Code
This field details the code for the Transaction Types.

Description
This field details the description for the Transaction Types.

Search Profile Code
This field allows for the entry of all or part of a code with the appropriate operand to search on.

Search Profile Description
This field allows for the entry of part or full Description for searching upon. Once details entered, the Search button should be selected to proceed with the Search.

Certificate Type Selection Form

This form allows the ePathway Administrator to assign and un-assign the Certificate Types that will be made available in ePathway.

Available Certificate Types

This column displays the list of merge types that are available to be assigned to ePathway Certificate Requests. The select/remove arrows can be used to assign the merge types from the left hand side to the right hand side.

Selected Certificate Types

This column displays the list of fields that have been assigned to the ePathway Certificate Request Function and will be exported to ePathway. The select/remove arrows can be used to un-assign the merge types from the right hand side to the left hand side.

Merge Type Detail button
This button when selected opens the 'Merge Type Maintenance' form which allows the ePathway administrator to set up the Request Type parameters for the Certificate Type and assign additional miscellaneous receipt transaction fees.

Merge Type Maintenance Form

This form allows the ePathway Administrator to set up the Request Type parameters for the Certificate Type and assign additional miscellaneous receipt transaction fees.

Merge Type

These fields are the selected merge type code and description of the merge type that is being maintained. These fields are not maintainable.

ePathway Request Type

This dropdown box allows the ePathway Administrator to assign whether a particular merge type is a 'Request Only' or if it is to be 'Automatically Generated'. 'Request Only' will require a council user to manually issue a Certificate in Pathway whereas the 'Automatically Generated' option issues the Certificate automatically.

ePathway Transaction Type

This field allows the ePathway Administrator to select the Transaction Type fee that will be added to the cost of the Merge Type. Additional Transaction Type fees can be assigned using the Insert button.

Debt Type

Debt Type is available if the following conditions have been met:

·   LDR Accounts Receivable Application is active

·   Customer Profile system indicates that Pathway or ePathway Property Certificates can be paid for by Debtors Invoice or Credit Balance

Where Pathway Accounts Receivable is being used, (as defined in the System Parameters) this parameter allows the nomination of the Debt Type that is to be used when generating the Invoice. It allows selection from the valid Pathway Debtors Debt Types.

Having this field at the Merge Type level enables customers using Pathway Accounts Receivable to separate the Debt Types (and therefore Ledger Accounts) per Merge Type.

If a Fee is specified for the Merge Type, then the Debt Type is mandatory.

Request Level
This field allows the ePathway Administrator to select which level the particular merge type will apply to. The levels that can be selected are 'Parcel', 'Property' and 'Both'.

Disable MSF
The "Disable MSF" parameter is now (as of Release 3.05) available on the Merge Type Maintenance screen for each selected Certificate Merge Type. Note that this is only visible when the MSF authorised function is enabled and the "MSF control" parameter has been enabled. This "Disable MSF" flag will initially default to OFF.
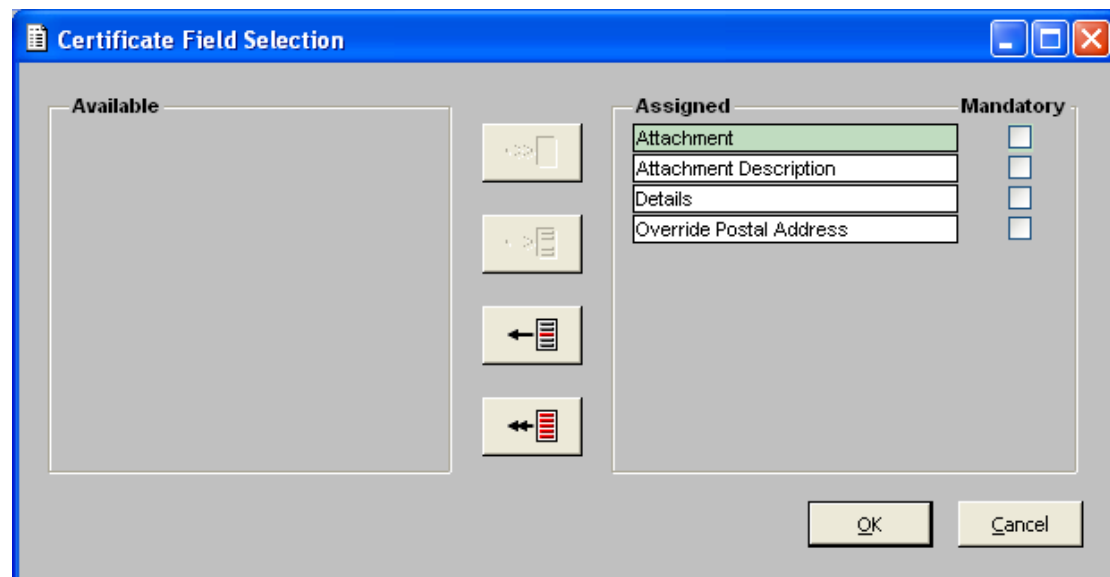
Additional Fees
The ePathway Administrator can use the Insert button to assign additional fees (i.e. fixed Miscellaneous Receipt Transaction Types). This allows the ePathway Administrator to assign additional fees to a particular merge type which will then be included in the cost and receipt generated in ePathway for that merge type.

Service Request Button
This button when selected will open the 'Service Request Maintenance' form which allows the ePathway Administrator to link a Service Request at a Certificate Type level (therefore making it optional for various Certificate Types).

Certificate Field Selection Form

This form allows the ePathway Administrator to assign and un-assign the user definable fields that will be exported to the ePathway Details page.

Available Field Selections
This column displays the list of fields that are available to be assigned to ePathway Certificate Requests. The select/remove arrows can be used to assign the fields from the left hand side to the right hand side.

Assigned Field Selections

This column displays the list of fields that have been assigned to the ePathway Certificate Request Function and will be exported to ePathway. The select/remove arrows can be used to un-assign the fields from the right hand side to the left hand side.

Mandatory Checkbox
This Checkbox allows the ePathway Administrator to make a field mandatory. If checked on it will be a mandatory field on the ePathway Details page.

ePathway Property Type Selection Form

This form allows the ePathway Administrator to assign and un-assign the property types that will be available for selection in ePathway.

Type Details
These fields show the type code and description to which the selected property types apply.

Non-Selectable
This column displays the list of property types that are available to be assigned to ePathway Certificate Requests. The select/remove arrows can be used to assign the property types from the left hand side to the right hand side.

Selectable
This column displays the list of property types that have been assigned to the ePathway Certificate Request Function and will be exported to ePathway. The select/remove arrows can be used to un-assign the property types from the right hand side to the left hand side.

Notice of Sale Field Maintenance

Notice of Sale Field Maintenance Selection Form

This option list the fields that may be exported to ePathway. If the field has been Assigned, that field will be exported to ePathway. Conversely, if the field is Available, then that field will not be exported to ePathway.

The 'Mandatory' Check Box allows you to define which fields are mandatory for the completion of the Notice of Sale transaction created via ePathway . If this is 'On', then the field will require mandatory input in ePathway. If the Check Box is 'Off', the field will be optional within ePathway. ePathway also allows you to determine whether the field has to be completed by the Initiating or Completing Solicitor.

> Note: System mandatory fields, for example Sale Type, Sale Date, cannot be set to non-mandatory.

Notice of Sale Field Selection

Available Fields
This column displays the list of fields that may be used within the ePathway Notice of Sale Function. One or All fields can be selected by using the Select/Remove buttons.

Assigned Fields
This column displays the list of fields that have been assigned to the ePathway Notice of Sale Function and will be exported to ePathway. One or Many fields can be de-selected by using the Select/Remove buttons. Note, that if the field has been flagged as mandatory, it cannot be removed from the Assigned list.

Mandatory
The 'Mandatory' Check Box allows you to define which fields are mandatory for the completion of the Notice of Sale transaction created via ePathway . If this is 'On', then the field will require mandatory input in ePathway. If the Check Box is 'Off', the field will be optional within

ePathway. ePathway also allows you to determine whether the field has to be completed by the Initiating or Completing Solicitor.

WorkSmart Requests Maintenance

The following topics are included in this section:

WorkSmart Name Role Maintenance

No Help yet available on this topic.

WorkSmart Fields Maintenance

No Help yet available on this topic.

Purge Request Log

No Help yet available on this topic.

Purge Request Log

Animal Registration Parameters

Overview

There was a business requirement to allow Councils the ability to cater for online entry of new Animal Registrations via ePathway for its Customers and to be able to process and review the new Animals within Pathway.

The following is a high level overview of the Animal Registration Process. It resembles functionality for existing modules such as Applications and Licensing for a consistent online experience, but is tailored to be relevant for Animal Registration.

→ Customer lands on the ePathway site
→ Customer selects the Type, Class and appropriate Registration Period e.g. Dog Registration >> Normal Desexed >> Full Year
→ Customer may be a Public or a Registered User.
→ Customer enters property location.
→ If a customer is a Public User then the name details will be displayed for entry.
→ If a customer is a Registered User then relevant details from the Registered User will be defaulted into the name details and will be displayed for entry/modification.
→ Customer enters animal details
→ Customer attaches any required supporting documentation
→ Customer may select to register another animal
→ Customer pays (if necessary)
→ Confirmation email and receipt is sent to customer
→ Pathway Customer Request is created and sent to nominated council officer (as per Applications) - optional
→ Animal registration record is sent to Pathway and the animal record created, registration record created and the receipt linked. Disc number will be blank.
→ A special process is now available to enable disc allocation for Animals created from ePathway.
→ Staff will review the records, create and link a name if necessary, change details on the animal record if necessary.
→ When all data is correct Council will allocate a start and end disc number for the interim records and run the Update process.
→ The disc numbers will be allocated to the Registration records and an optional Letter Request will be produced.
→ Any invalid records will not be updated and will remain Not Yet Allocated until resolved.

The parameters for ePathway Animal Registration are available via new menu options:
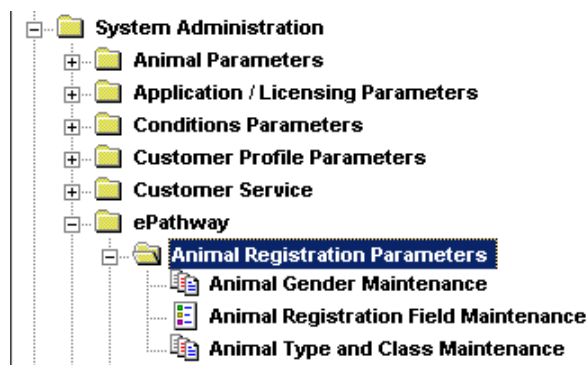
EPathway General Functionality

The following 'standard' ePathway Functionality for existing modules is included for Animal Registration:

ePathway setup allows separate definition of parameters depending upon the Animal Type. For example, Dog Registrations are separate to Cat Registrations and can be tailored accordingly.

Each Animal Class has its own associated:
- Agreement Page
- Email Header and Footer
- Confirmation Instructions
- Submission Instructions
- AGLS Metadata Title Prefix

Each Animal Class has its own Page Layout which can be defined. As per existing modules this allows multiple pages and multiple page groups within. Each page and group has standard Sequence, Title, Image URL, Image Text and Instructions. And groups have Group Rules and Label Width definition.

Each Animal Class for each page Group allows the sequencing and assignment of the required Fields with specific Labels, Hover Text, etc.

Support is provided for all current Payment Gateways with by-pass where the calculated fee is zero. (e.g. Guide Dogs do not attract a fee).

Support for the Shopping Cart functionality.

Audit Event Notification for successful and unsuccessful registration of an animal record, with the ability to Monitor / not Monitor events.

The use of the standard ePathway Property Search / Select facility.

In-built use of the External Names Function.

The Request Broker has been updated for Animal Registration.

Help File URL's have been created for Animal forms.

New Top Level Menu and associated menu Items e.g. New Animal, Edit Animal

Maintain the text for System Images required by the Animal Registration pages.

The creation of a Customer Service Request on lodgement of an Animal Registration (optional) as per other modules e.g. Application Lodgement.

Use the ePathway Error Service to create a Customer Request where required (failures).

Attachments function is included with small enhancement to allow description to be tailored and made Read Only.

ePathway References are created upon successful submission.

Pathway Parameters for ePathway

Authorised Function and the ePathway Animal Registration Module

Application Code Maintenance
The Application Code Maintenance form now includes the EAN module for ePathway Animal Registration. This needs to be Active in order for the new functionality to be available within Pathway.

System Administration >> System Parameters >> Application Code Maintenance

Authorised Functions Maintenance

A new Authorised Function has been created for the ePathway System Module (ESY) which determines whether the ePathway Animal Registration function is licensed.

This must have a valid Access Code and be Active in order for Animal Registration to be available for ePathway.

System Administration >> System Parameters >> System Parameter Maintenance >> License Details >> Authorised Function

Service Request Maintenance

A nominated Pathway User (or Group) will be notified when a new Animal Registration record has been submitted. The e-mail format and recipient can be set as well as whether a Customer Service Request will be generated (with the new animal as a linked Module).
System Administration >> ePathway >> System Parameters >> Service Request Maintenance

<u>Application Function Maintenance</u>
The new EANREG Application Function has been created for ePathway Animal Registration so it can be assigned to Customer Profiles (see later sections for screen image examples).
System Administration >> Customer Profile Parameters >> Application Function Maintenance >> [EANREG …]

Animal Fees
Whenever Animal Registration Fees are changed the Web Export via Pathway for Animal Registrations **must be performed**. Until this is performed any changes will not be reflected in ePathway.

The Process is:

- Change Class Fees in Pathway

- Run System Administrator Menu (Production) >> System Administration >> ePathway >> System Processing >> Web Server Export for Animal Registrations.

- Run Configuration >> Reload Configuration Cache in ePathway

Animal Gender Maintenance

Animal Gender Maintenance

A new parameter form has been created to allow the selection of which Gender codes already established for Animal Registration are to be used for ePathway. Those selected are shown on the right-hand-side of the form. Only these Gender codes will be available in ePathway.

Genders Not Authorised to Register Animals
This column shows all Gender codes that have been defined in the Pathway Animal Module.

Genders Authorised to Register Animals.
This column shows all Gender codes that will be made available in ePathway.

Animal Registration Field Maintenance (Module Level)

Animal Registration Field Maintenance

The system will pre-populate the main fields available for ePathway Animal Registration. Also, as fields are later assigned for each Animal Type/Class combination the field names will be automatically added to the list for References and Questionnaires.

XML Tag Name
This column contains the XML Tag Names for each of the fields for this Animal Class.

Description
This field contains the textual description of the field.

Field Type
This field displays the field type. It is not maintainable.

XML Type
This field displays the XML field type. It is not maintainable.

Maximum Length
This field displays the maximum field size for the element.

Active
This field determines whether or not the field is available.
Some fields may be turned off if not required.
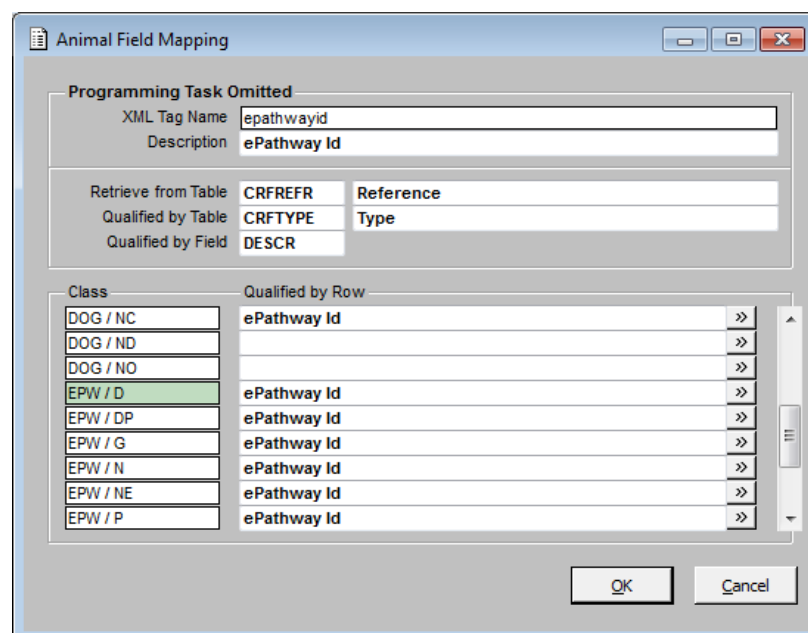
Options
Clicking this button will take the user to the Animal Field Mapping form.

Animal Field Mapping

Detail out in the Options column to assign Reference Types (if required) to map to ePathway Fields.

In this example the ePathway ID that is assigned to the Animal will be written to the Animal Reference identified as ePathway Id.

Important Note

If the External Names Authorised Function is **not** in use then you will need to create a Memo Type to hold the Name and Address Details entered by the customer.

Assign the memo type to the Field called Lodgement Memo.

Retrieve from Table

The name of the table that will receive the data.

Qualified by Table

The 'parameter' table for the table where the data is to be written:
e.g. CRFTYPE for References, CMOTYPE for Memo.

Class

This field contains the Animal Type and Class that is being assigned a mapped value.
The first part of the code is the Animal Type Code and the second part of the code is the Class Code.
It is recommended that a field is mapped for all Types and Classes.
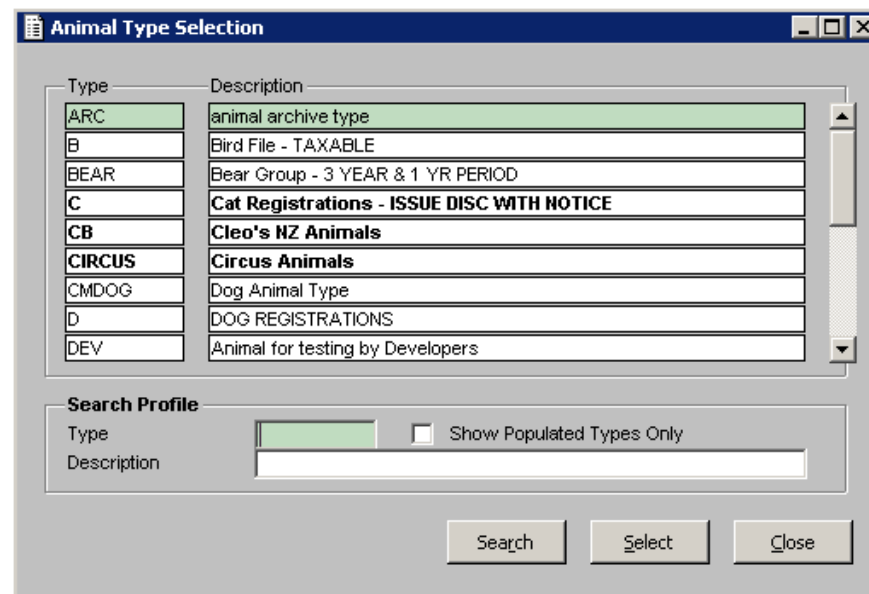
Qualified by Row

This field contains the description of the mapped field.

Animal Type and Class Maintenance

Animal Type Selection

Upon selecting the Animal Type and Class Maintenance menu option the Animal Type Selection form is presented to show each of the potential Animal Types that can be defined for use with ePathway. By default none will be automatically selected, but as we define ePathway parameters for each Type they will be bolded on the Selection form to show they have parameters defined behind them.
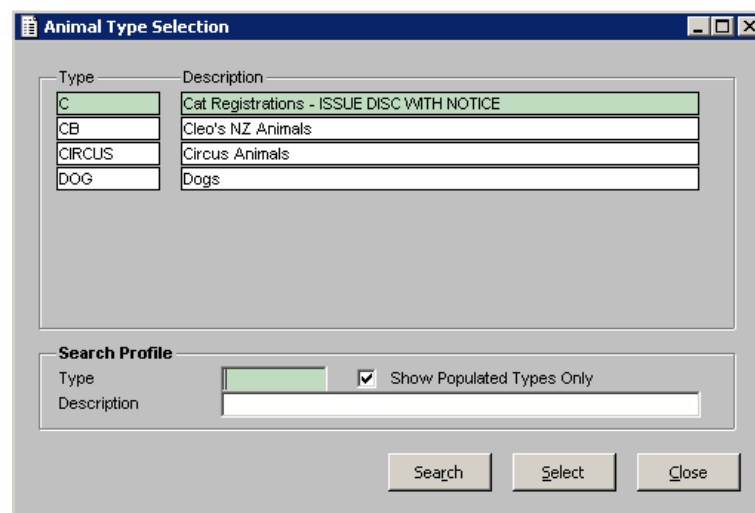
Note that we can filter the selection form to only show Types that have parameters behind them by checking the "Show Populated Types Only" check box and pressing the Search button which may be useful for sites and test environments with a large number of Types defined.

Animal Class Selection

Upon selecting an Animal Type we are presented with the Animal Class Maintenance form. Here we can choose the associated Animal Classes to use for ePathway and access the Animal Class level parameters.

The Animal Colour selection form is also available on this form to determine the Colours we want available for selection for this Animal Type. Animal Colours are selected at the Type level.

Once an Animal Class is selected (ie. On the right-hand-side of the selection part of the form), the parameters for the Animal Class can be established by pressing the detail button [...] next to the Animal Class to present the following form.

Classes that this type can not Register
This column contains a list of all Classes for this Animal Type.
Select the Classes that you wish to allow for New Registration via ePathway.
You may choose for example not to select "Dangerous Dogs" for registration via ePathway.

Classes that this Type can Register
This column contains a list of all Classes that are allowed for New Registration via ePathway.

Detail Button
The detail button will take the user to the Animal Class Maintenance form where further parameters for the Class are available.

Animal Colour
Clicking this button takes the user to the Animal Colour Maintenance form.

Animal Colour Maintenance

The Animal Colour Maintenance form allows selection of Colours to be used by ePathway at the selected Animal Type level.

Note that this differs from the Pathway Animal Registration module where they are defined at the module level. This allows us to choose a subset of colours more relevant to the particular

Animal Type to reduce the subsequent selections presented to online Customers. E.g. Some colours may be more relevant to Cats than Dogs. (E.g. Tortoiseshell)
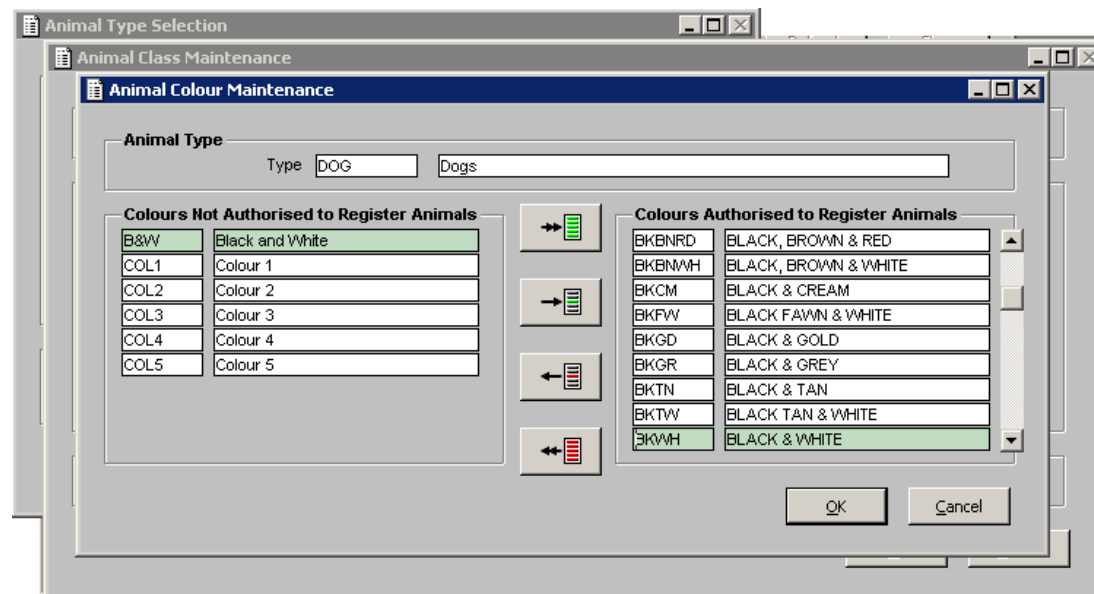


Colours Not Authorised to Register Animals
This column contains a list of all Colours available to the Animal module.

Colours Authorised to Register Animals
This column contains a list of all Colours that will be available to ePathway for this Animal Type.

Animal Class Maintenance

Upon selecting the Animal Class details we have access to the Animal Class level parameters including Name Roles, Fields and Animal Breeds.
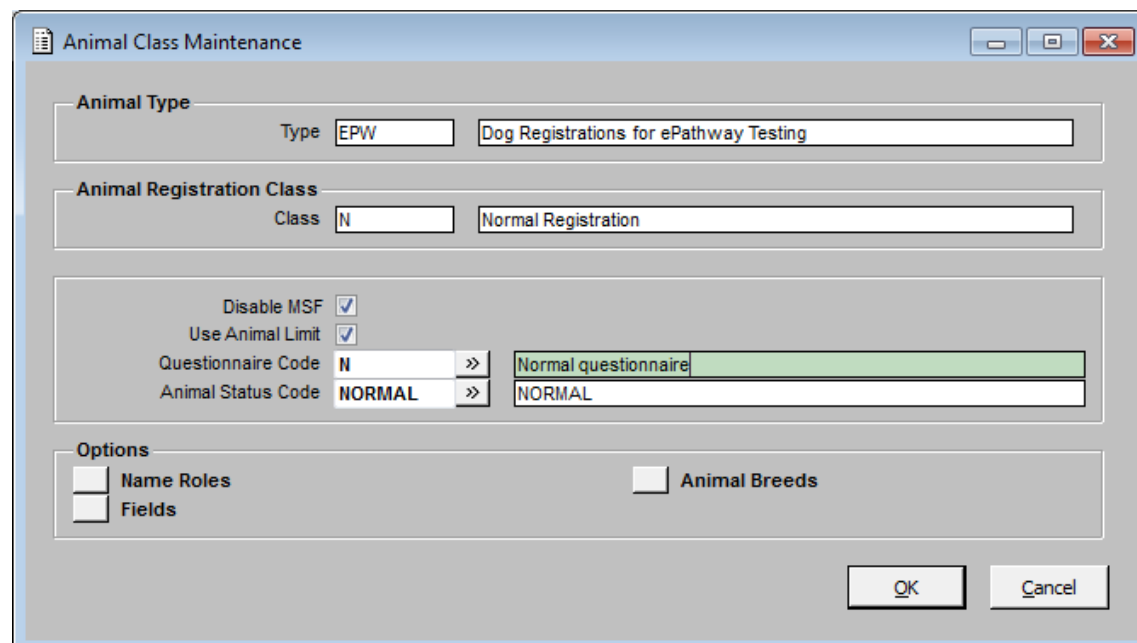
Here we can determine the following fields:

Disable MSF

This field determines whether the Merchant Service Fee (MSF) will be used when calculating the final fee for the Animal Registration for this Animal Class. The Disable MSF only applies where the Authorised Function Merchant Service Fee - External and ePathway is in use

Use Animal Limit

Checking this flag on will display a warning on the ePathway Animal Disc Allocation process if the animal being registered exceeds the number allowed. Please note that setting this flag does not stop the customer from registering the animal.

This field determines whether number of Animals per property limit will be acknowledged during the ePathway Disc Allocation process in Pathway.

Questionnaire Code (Optional)

This field allows a Questionnaire to be associated with this Animal Class. The Questions from this Questionnaire can then be optionally used when defining the ePathway Page Layout in order to prompt the Customer for Answers. The Customers response to the questions will then map back to the Animal Registration created when the Animal is Submitted and be available through standard Pathway Questionnaire functionality.

Animal Status Code

This field determines the status that will be applied to animals registered via ePathway.

Name Role Maintenance

This form allows for the definition of the fields that make up the Owner Name details. This form is at the Animal Class. For example, you may record different name details for Pensioners as for non-pensioners.

Unlike other modules (such as Applications), Animals only allows for the one Name Role being the Owner

The parameters on this form behave in the same manner as other existing modules (such as Applications and Licensing) and allows determination of how the Name may be defaulted, search filtering etc.

Automatic Name Default

This option can be set to either;

Personal User Name
Company or Personal User Name
Property Owners
(none)

It is used by the registration process to attempt to automatically populate the name role with the Registered Users Company Name, Personal Name or the Property Owners Name. If the Registration is being lodged by a Public User, only the Property Owner option is applicable.

Name Searching
This option can be set to either;

All Names
Owner Names Only
(none)

It is used to define whether searches can be performed over the Pathway Name and Address Register. If the setting is All Names, any name can be enquired upon and selected for the role type. If the setting is Owner Names Only, only names that are linked to the Property Module as an Owner can be searched for and selected. If the setting is (none), no searching is allowed.

Allow entry of multiple names
If this is set on, then multiple names can be linked to the name role type. Otherwise only a single name can be selected.

Mandatory
If this flag is set on then a Name must be entered.
If this flag is off then a name is not mandatory.

Use eMail Address
For the Primary Name Role (i.e. Role 0) this parameter has been introduced which determines if the e-Mail address used in ePathway is defaulted from this Role for Public Users.

This means if you lodge a record as PUBLIC user then the email address you enter on the name roles form in ePathway carries over to the confirmation page rather than re-entering the address again there.

Fields Button
Clicking this button takes the user to the Name Role Fields maintenance where further name set up parameters are established.

Important Note: it is important to access the Name Role Field form regardless of whether any changes are to be made, as the list of fields is created on first entry to the form for the current Animal Class.

Name Role Fields Maintenance

Choose the Fields button to access the Fields to be used for the Owner role. It is important to visit this form regardless of whether any fields are to be deselected as the initial list of chosen fields is created upon first entry into this form for an Animal Class.

XML Tag Name
This column contains a list of XML Tag Names for all of the available Name fields.

Description
This column contains the description of the XML Tag for all of the available Name fields.

Mandatory
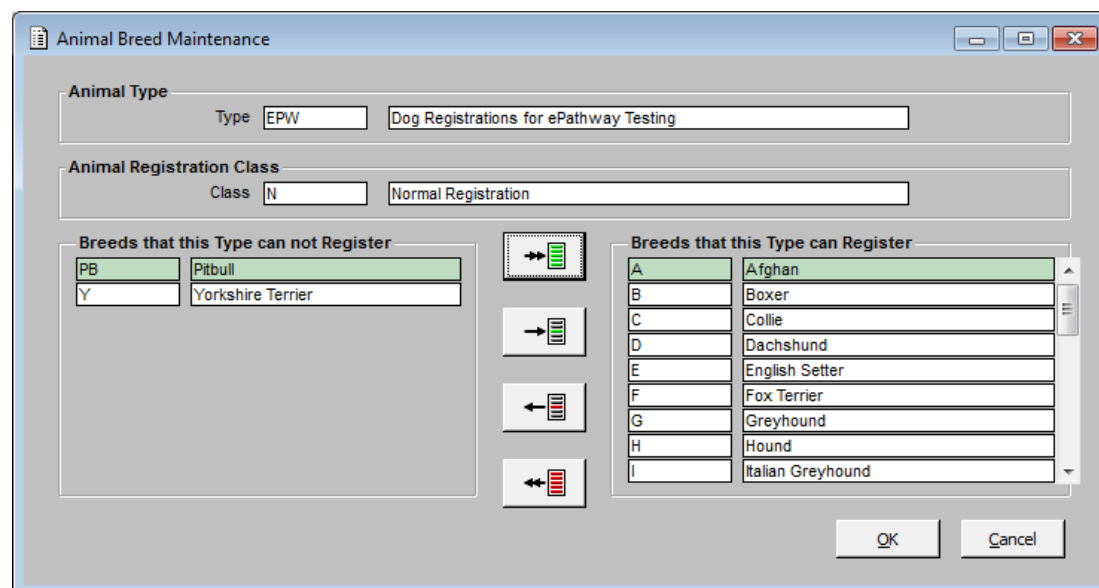When this flag is set On then the field will be mandatory in ePathway.
Active
When this flag is set On then the field will be made available to ePathway.
If this flag is set Off then the field will not be available in ePathway.

Animal Breed Maintenance

This form allows for the allocation of Animal Breeds that are to be published to ePathway.
This is done per Animal Class.

Breeds that this Type can not Register

This column contains a list of all Animal Breeds available to the Animal Type.
Breeds remaining in this column will not be available to epathway.
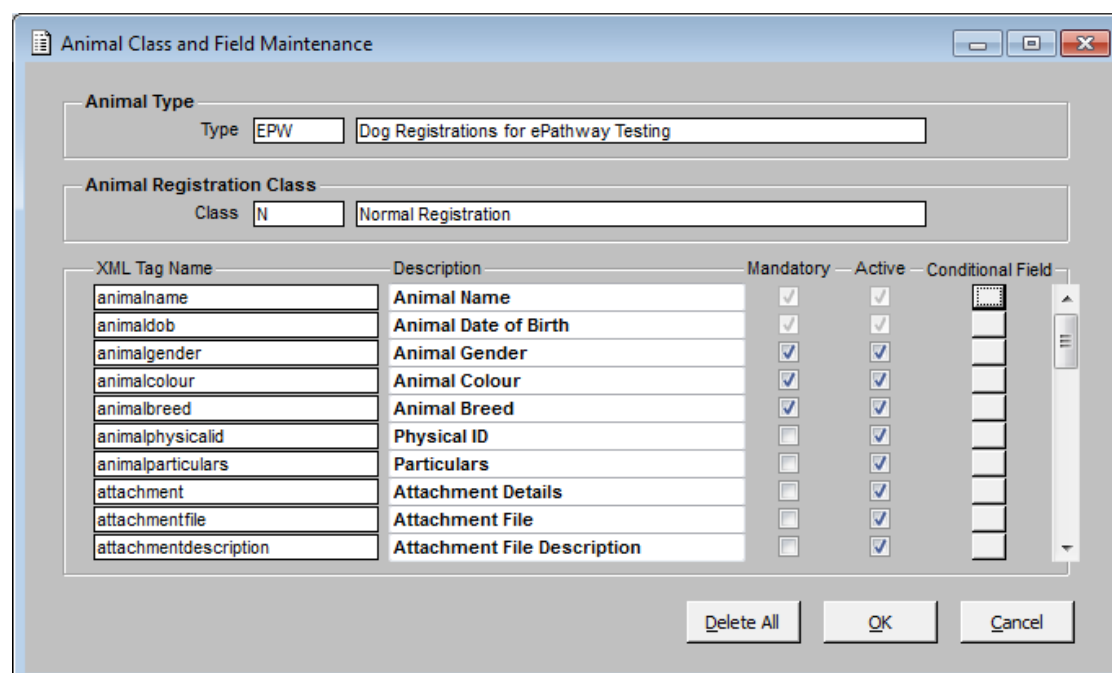
Breeds that this Type can Register

This column contains a list of all Animal Breeds that will be available in ePathway for this Registration Class.

Fields Maintenance (Class Level)

The Fields Maintenance form contains the Animal Registration fields required at the Animal Class level for ePathway together with their XML Tag Names.

For any given Animal Class a field may be 'deactivated' and will not be displayed in ePathway. Likewise, for different Classes, certain fields may be mandatory or not.

Class
This field contains the current Animal Class that is being maintained. The settings are for this class only.

XML Tag Name and Description
This field contains the XML Tag Name and the textual description of the field.
All the fields available to this class are listed.

Mandatory
This flag indicates whether or the not the field should be flagged as mandatory in ePathway.

Some fields are 'system' mandatory and cannot be changed.

Active
This flag indicates whether or the not the field should be available to the Class. If the flag is OFF then the field will not be available to ePathway.
If the flag checkbox is not editable then the field has been de-activated at the module level.
(See Animal Registration Field Maintenance).

Customer Profile Maintenance / Web User Maintenance

In order for users (including the Public ePathway user) to use ePathway Animal Registration the Web User will need to be setup to have permission for the ePathway Animal Registration function and also the Animal Types within.

The Functions button can be used to assign ePathway Animal Registration to the user.

Once assigned, the detail button […] on the Customer Profile Maintenance form can be used to select the Animal Types available.

Once assigned, the Animal Types can be selected via the […] detail button.