Pathway UX
User Guide
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infor Pathway

Feedback
Your suggestions and comments regarding this documentation are highly regarded. Please contact Infor via https://concierge.infor.com

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1. About This Guide

This guide provides information about Pathway UX Client.

a. Intended Audience

This document is intended for all customers.

b. Contacting Infor

If you have questions about Infor products go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

2. Pathway UX Overview

These features are supported:

- A fully mobile solution designed to provide improved user experience.
- New interface provides better visual contrast, larger fonts and icons, ease of access to the menu, and is device independent.
- Display shrinks and expands depending on the device.
- All modules have user-defined summary displays to enable the tailoring of information presented to a target group or even individual users.

Default Summary forms are provided to get you going.

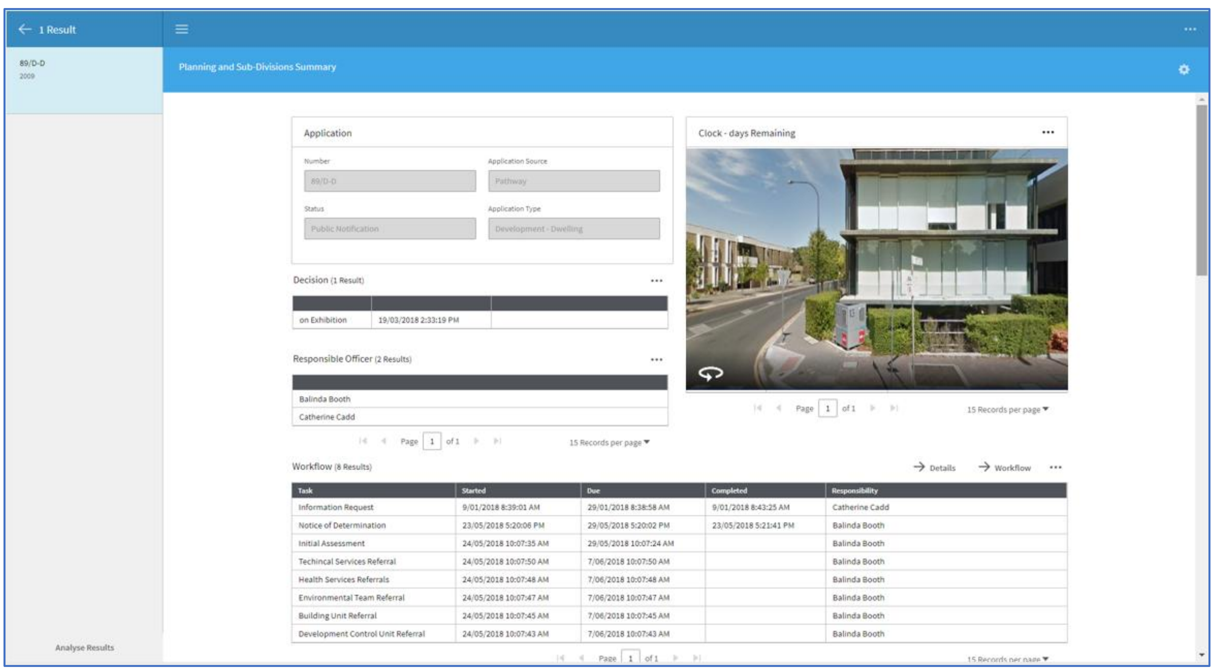


Image 1

Although Infor recommends the use of Chrome, other browsers that are supported are Firefox, Safari, and Edge.

NOTE: Internet Explorer is not supported and browser versions must be current.

3. Interface

This section gives you basic information on how to log on and log off to Pathway UX and navigation techniques.

a. Logging on to Pathway UX

Your IT Team provides you with a method for launching Pathway UX, which is a bookmark in a browser or an icon on your desktop. This method is completely site configurable.

Launch Pathway UX and the Log On screen is displayed.

Image 2

Enter your User ID and Password that has been provided by your IT Team, then click on the Sign in Button. Or your IT Team may have configured Single Sign On and UX will open without requiring a username and password.

b. Main Menu

The Home page is displayed with the main menu displayed on the left. The menu will change with your organisation role. The menu is shown in a collapsed view. The down arrow expands the Group.

At the top of the menu there are three sections that will be the same for all User Accounts.

- My Account
- Bookmarks
- My Roles

These will be expanded on in a later section.

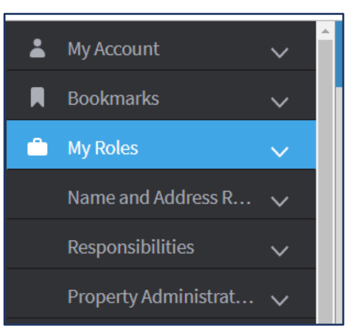


Image 3

c. Component Parts

Basic layout:

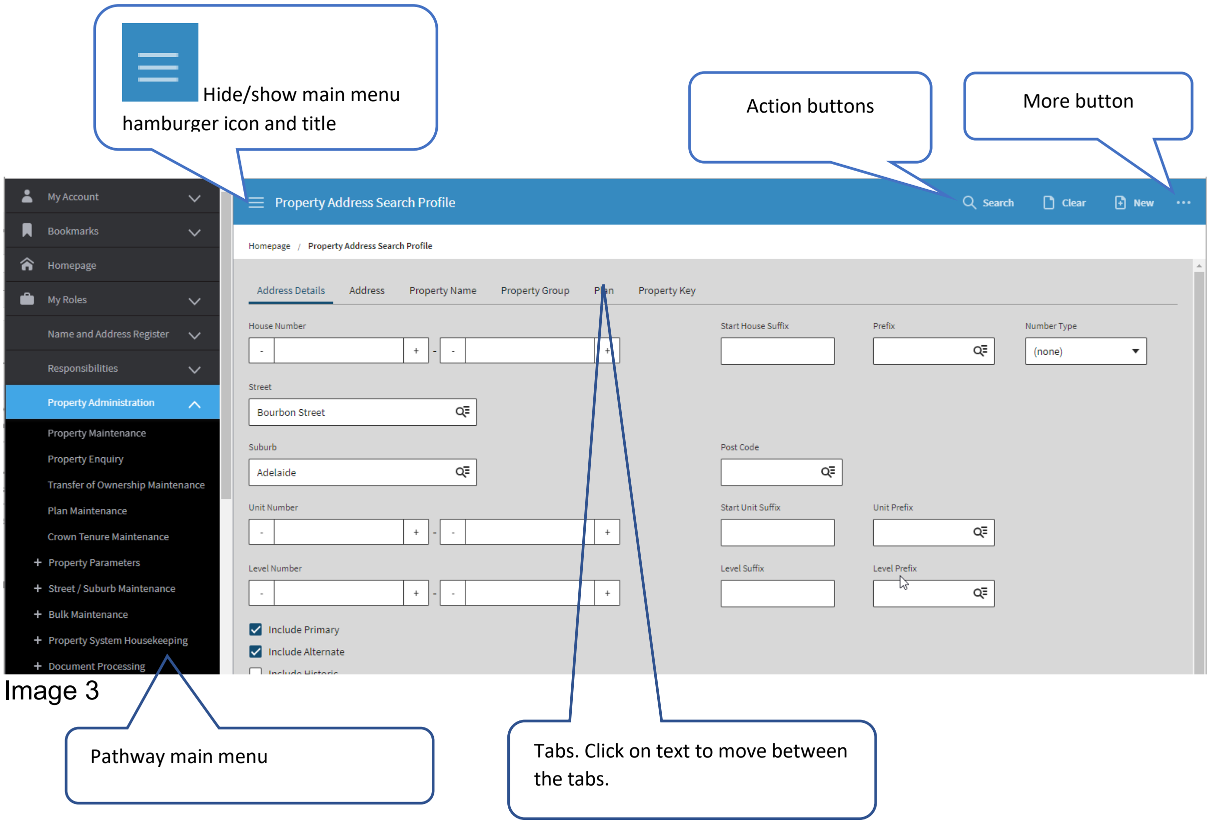


Image 3

d. Logging off

Expand the My Account menu group and click Sign Out.

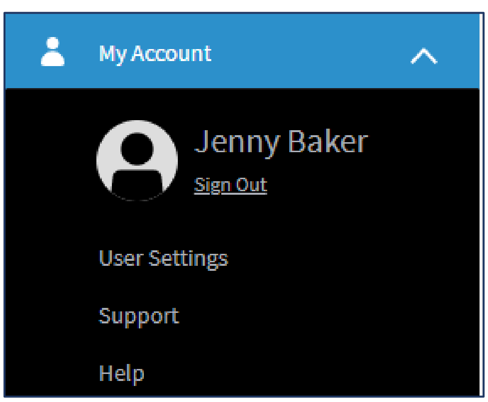


Image 4

4. Personalise Your Workspace

This section covers basic settings you can apply to personalise your UX workspace.

The available settings are controlled by your IT Team. For example, they can set the default colour for the Production, Acceptance, Testing and Training environments and restrict other User Accounts from changing this setting.

NOTE: If you are a system administrator: log on as your trusted mode user. Select My Account > User Settings > More (horizontal ellipse) > Default Settings. Settings applied will affect all User Accounts.

NOTE: If User Accounts cannot see a mode or colours menu it is likely the User Override has not been turned on in Default Settings.

a. Changing Mode and Accent Colours

In the top right corner of your screen in the title bar is the More button as shown in Image 5.

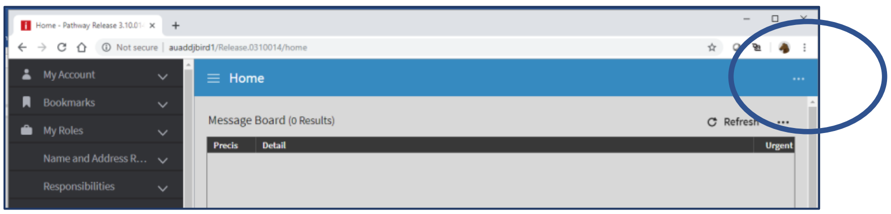


Image 5

Clicking the More button will display a sub-menu.

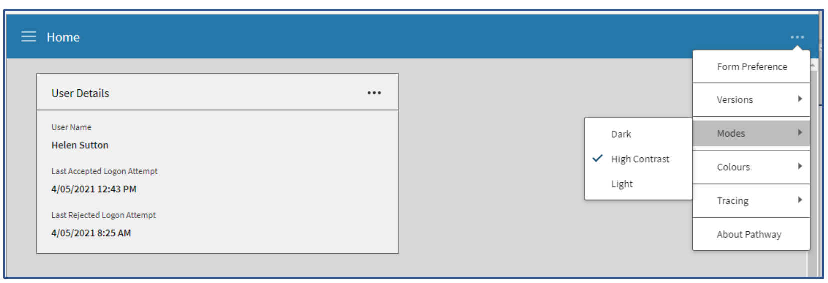


Image 6

From here select the Mode you wish to use. This Mode can be changed at any time.
Your Default Mode is set in User Settings which is covered later in this document.
In addition to the Mode, you may also select the colours that you wish to use, Image 6.

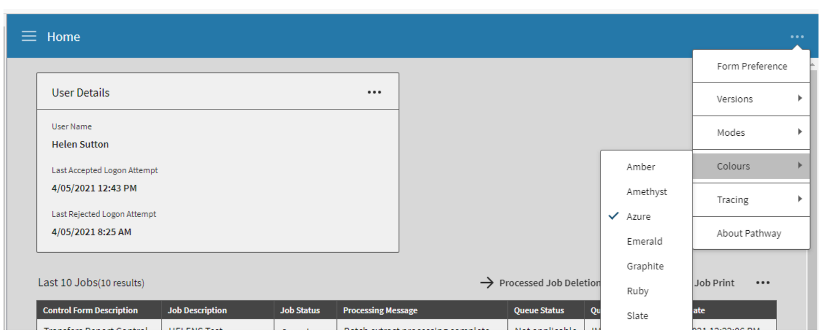


Image 7

b. User Settings

User Settings lets you nominate certain settings as your Default for various parts of your Workspace.

Select the My Account menu, Image 8 and then User Settings, Image 9.

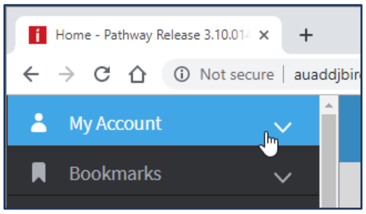


Image 8

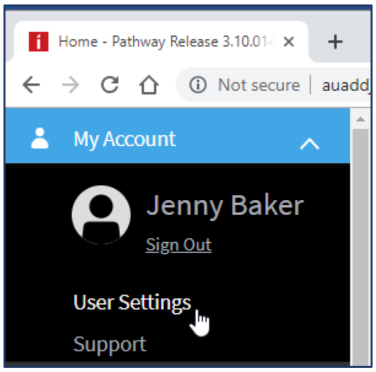


Image 9

User Settings include:

Culture	English is the only language available.
Versions	Select between Classic and New.
Mode	Select from Light, Dark or High Contrast.
Colours	Select a colour.
Compact Display Mode	Switching this mode on will condense some white space between fields. The font is also made smaller. This setting may be changed at any time.
Button Tooltips	Slide to the right to turn on Button Tooltips. Tooltips will show when the mouse is hovered over a button.
Open Options in Search Results	Slide to the right to automatically display the Options menu over the Summary display. Slide to the left to manually select the Options menu.
Option Badges	Whether to show the number of records in the Options menu.
Expand Behaviour	Where a display is divided into sections, there will be a Show More or Show Less field. This determines whether all sections should be opened, just the first, or none.
Grid Row Height	Where data is presented in a grid, what row height should be the default.
Auto Complete Page Size	Where inputting data such as a file location the setting determines how many matching results are displayed as the file location is entered.
Grid Page Size	When displaying records in a grid how many results should be displayed before Next Page is required.

Lookup Page Size	How many records are displayed in a Lookup List before Next Page is required.
Search Page Size	When searching for records how many records should display in the result list before a Continue is required.
Swap-list Page Size	Where a swap-list is used how many records should display before Next Page is required.
Sort	Whether the Menu is sorted Alphabetically or As Sequenced, the default menu order.
Open on Large Device	This setting determines whether the Main Menu will be automatically opened when using large device like a computer monitor. If the slider is on, the Menu will be displayed. If the slider is off, the Menu will not be displayed and will need to be opened via the Menu Hamburger.
Sort Internal Nodes First	If the slider is on, the menu branches (internal nodes) are sorted before any menu options in both the left-hand side panel and the right. It takes precedence over the Sort field. The Sort setting will then be used for sorting within the menu branches and within the menu options.
Disable Pathway Agent	The Pathway Agent is used for document processing, GIS interface and other interface processes. This should be set to enabled. At this stage the Pathway Agent cannot be used on iPad mobile devices and so could be disabled on those devices.

c. Help Menu

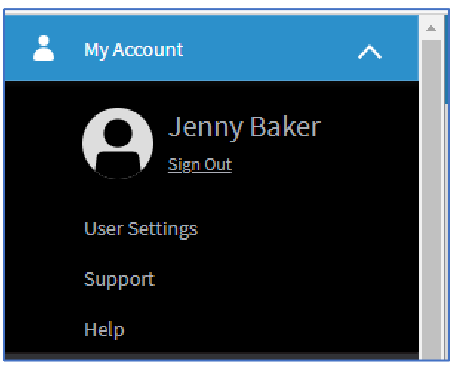


Image 10

This Help menu leads to limited documentation.

Help can also be found by using the F1 keyboard button on any form.

5. Working with Pathway UX

a. Menus

When a User Account has more than one menu they can now be found under the My Roles menu. These are the Roles that your IT Team have assigned.

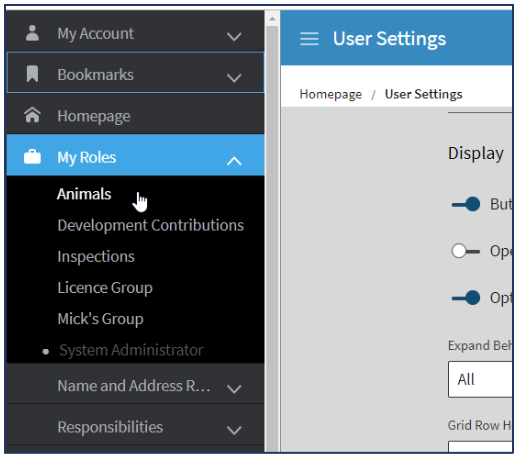


Image 11

b. Bookmarks

A Bookmark is a shortcut to a frequently used function. Bookmarks replace Favourites.

For example, if you are working in the Revenue Dept then you may use Assessment Maintenance frequently throughout the day.

To create a Bookmark for Assessment Maintenance:
1 Expand the Rates Accounting Menu.
2 Right mouse click on Assessment Maintenance.
3 Select Copy to Bookmarks.

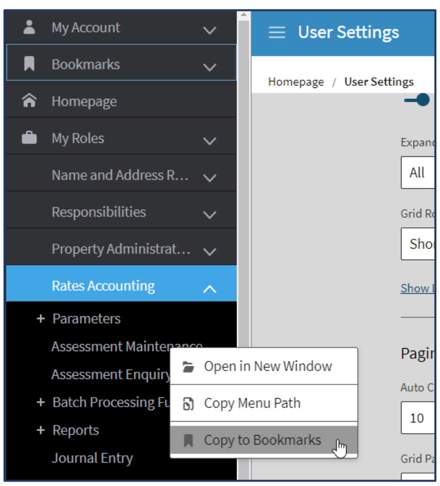


Image 12

To access your Bookmarks, expand the Bookmarks menu. Bookmarks are available to the program level only. Class based items, like Application Maintenance, do not include the Class setting.

c. Menu Searching

A Menu search field is available at the top of the Menu, Images 13 and 14.

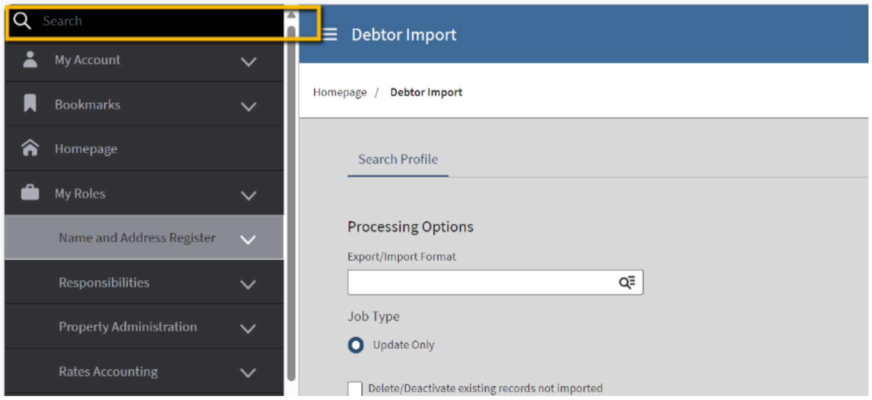


Image 13

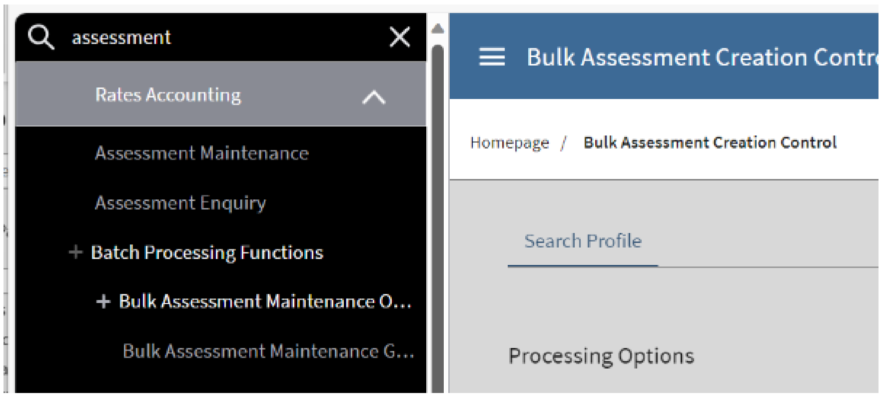


Image 14

d. Starting and Closing Programs

Programs are started directly via the Main Menu.

Programs do not have to be closed before selecting another program, however if you have unsaved changes you will be prompted to save them.

Example: you are in Assessment Maintenance, have finished your work and will now work in Property.

If the Menu is not displayed, click on the Menu Hamburger icon to display the menu.

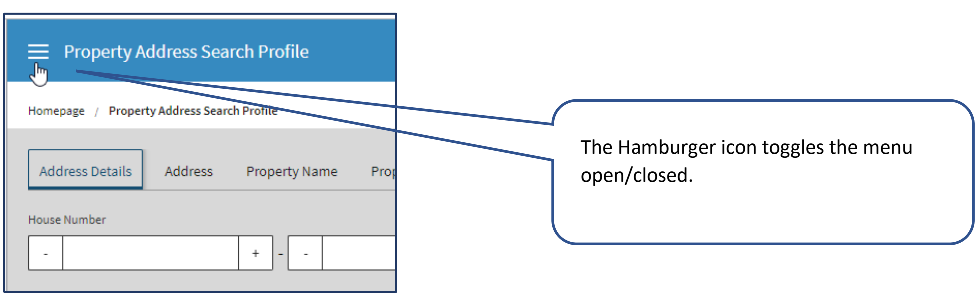


Image 15

You may either start Property Maintenance in a new Window (right mouse click on the menu) or start Property Maintenance immediately, Assessment Maintenance will close and the Property Search Profile will be displayed.

e. Opening in Another Tab

When dealing with multiple Pathway processes, the user can open each process in an individual browser tab or in a new browser window.

To run your selected process in a new tab, right-click the menu option and select Open in New Window.

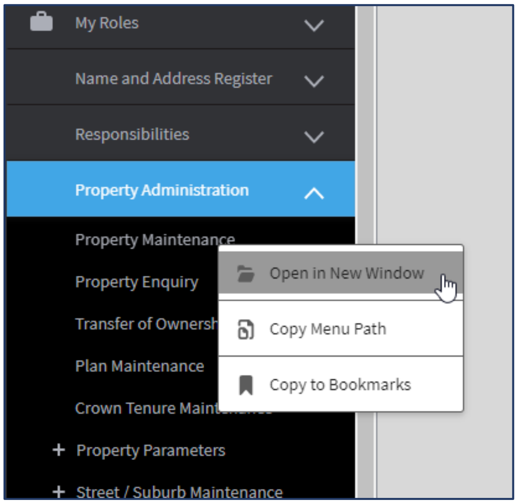


Image 16

Each tab heading reflects the process being performed at the time., Image 17.

Image 17

Your browser determines whether the option will be opened in a new tab, or a new window.

NOTE: Try holding down the Shift Key whilst clicking Open in New Window if you specifically want a new window.

f. Tabs within the Display

Some Displays have multiple tabs.

For example, the Property Search Profile has various search options presented in different tabs.

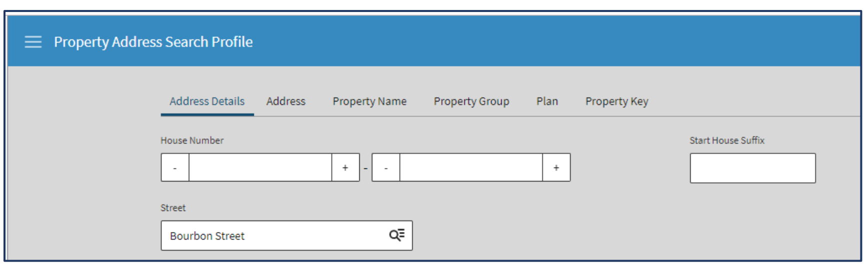


Image 18

To activate the tab, click on the heading. For example, click the Property Name tab to display the Property Name field.

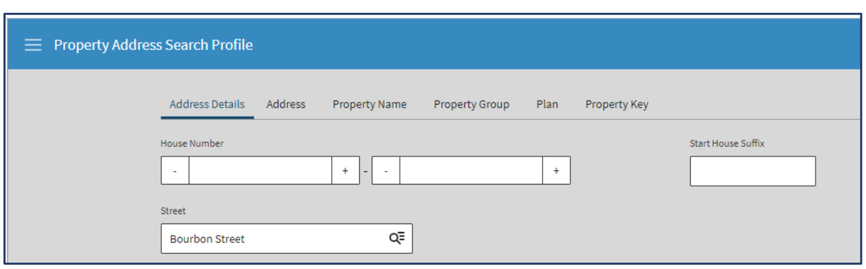
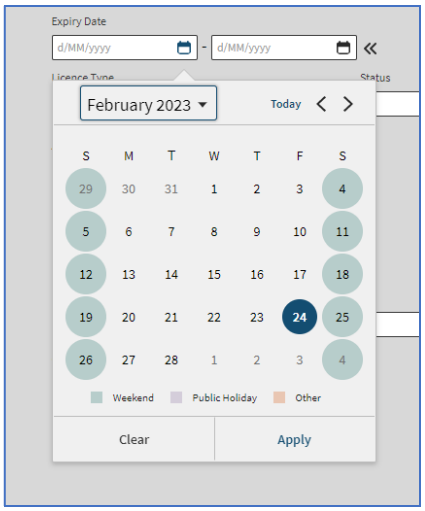
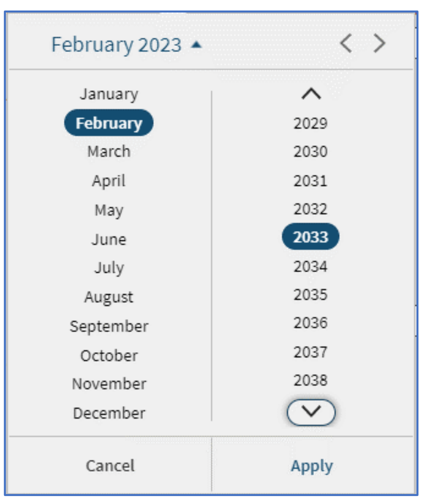
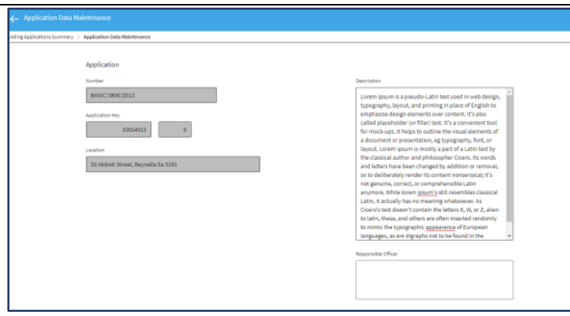
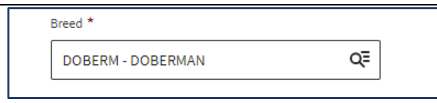
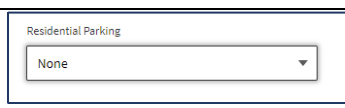
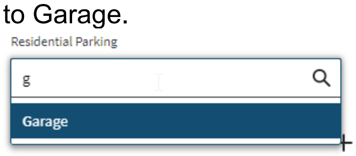


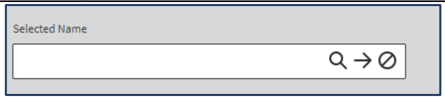
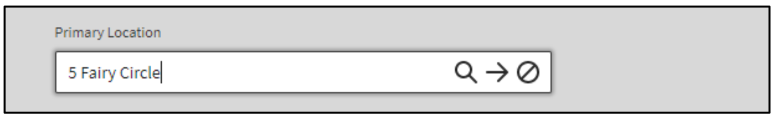
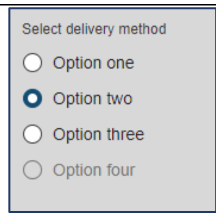
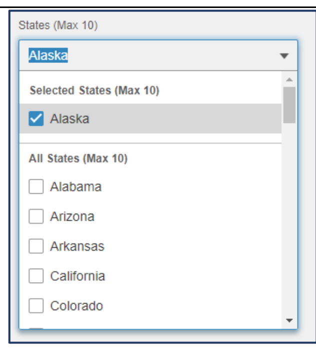
Image 19

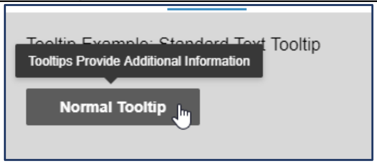
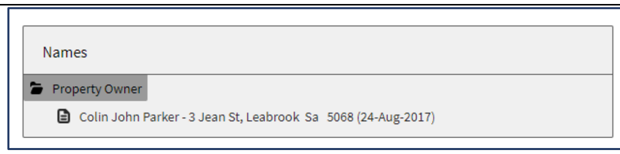
g. Types of Fields

The different types of fields available in Pathway UX are:

Field	Description
Date	Specify the date in dd-mm-yy format. For example, specify 020719 in the Lodgement Date field to indicate 2nd July 2019. Slashes are not required, and the date is automatically displayed as 2/07/2019. Date entry will default to the 'current month and year' where they are not specifically entered. For example: assuming current month is September and current year is 2020. User must tab out of the field. Entering 7 - Result: 7/09/2020 Entering 07 - Result 7/09/2020 Entering 710 - Result: 7/10/2020 Note: This field does not have a default value. You can also select the date through the Calendar pop-up window, Image 20.  Image 20  Image 21 **NOTE**: The dates provided use Pathway defined Calendars. This means that any date you need to enter must be set up in the Pathway Calendar system.
Time	Specify the time in 24 hour format. For example, specify 20000PM in the Time field to indicate 2:00:00 PM.

Field	Description
Spin box	 Image 22 Spin boxes are used for specifying numeric values. You can specify the number directly into the field or use the plus (–) and add (+) buttons to adjust the values.
Text	 Image 23 A text field is used to specify free format alphanumeric data.
Lookup	 Image 24 A lookup field is used where a set data value is specified. For example, when you click the Breed lookup field, a pop-up window shows a list of breeds for an Animal Registration. You can specify the code directly in the lookup field. If there is only one match the field is populated. If you specify an incorrect code or a code that does not have a match, the full list of valid entries is displayed. You can also search through the pop-up list. See Using pop-ups.
Drop-down	 Image 25 You can specify single or multiple characters in the field and the resulting list is narrowed to the matching items. For example, specifying “g” in the Residential Parking field narrows the field results to Garage.  Image 26

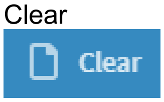
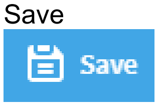
Field	Description
Search / View	 Image 27 This type of field is used typically where links are required to other modules. In this example it will link to a name in the Name and Address Register. Press the magnifying glass to navigate to the destination module e.g. Name and Address. The right arrow will navigate to a currently selected Name. The Stop icon will remove the current link. In some case's these fields are input capable. For Example: Application Lodgement: Property Address or Name can be entered; the navigation will then go to the appropriate module with the values pre-entered.  Image 28
Radio buttons	 Image 29 Radio buttons are used where the user is required to select only one of the values.
Multi-select	 Image 30 This field type is used where multiple values are acceptable. The list will remain open until the user has finished their selection. The check boxes are used for selecting.

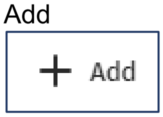
Field	Description
Tooltips	 Image 31 Tooltips (where provided) show additional information about the behaviour.
Busy indicator	 Image 32 This icon is displayed when the system is busy. User action is not permitted until completion.
Tree	 Image 33 Data is presented as a tree-like structure. Drill out is available on the sub-groups within the tree.

h. Action Buttons

Buttons that are not valid for a process are displayed as dimmed or not shown at all.

This table lists the action buttons used in Pathway UX:

Button	Description
Clear 	Clears the fields on a Search Profile. If you have specified values into fields but have not performed a search, the data in the fields are cleared. If you have performed a search and have returned to the form, the complete form is reloaded.
Save 	Saves the data that has been changed on the form. The standard behaviour is that the form is re-presented for further data entry. However, this behaviour is not possible in all instances and the user is automatically redirected to the appropriate form.
Undo 	Reverts any data entry that has been performed to its original or last saved state.
Search 	Performs a search based on the criteria specified.

More 	The More button indicates that further options are available for selection. This button is positioned on the Pathway UX title bar, the Form title bar, or against grids, depending on the functionality.
Options 	The Options button shows a list of valid maintenance options depending on your process.
New 	Creates a new record.
Back Arrow 	The back arrow is found next to the Form title and takes the user back one form. If there are unsaved changes, a message is displayed.
Menu Hamburger 	The main menu hamburger icon shows or hides the main menu.
Detail 	This button is found at the top of a grid of records. The user selects a record in the grid and clicks the Detail button for further information. This button can have text next to it where more than one Detail button is required. For example, these Detail buttons are displayed: 
Add 	This button is found at the top of a grid of records. The user can add a new record to the grid.

i. Pop-ups

Pop-ups are used where the user is required to select from a pre-determined list of values. For example, Land Use in the Property module.

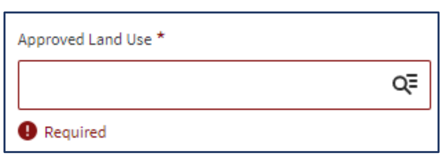


Image 34

If the Land Use code is known, specify the value directly into the field.

For example, specify 117 in the Approved Land Use field and tab out of field.

A wildcard may also be used.

For example, specify 1* in the Land Use Code field and tab out of field.

The search results show all matched entries. When you click an entry, it is returned to the field.

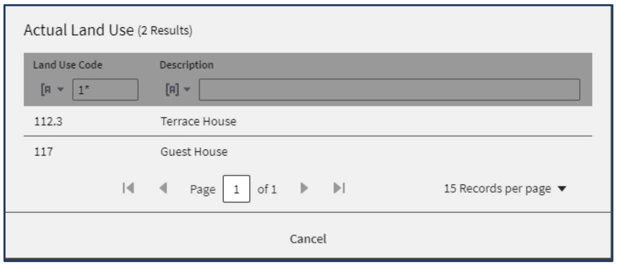


Image 35

If the code is not known, you can click the search button.

The full list of values is then presented.

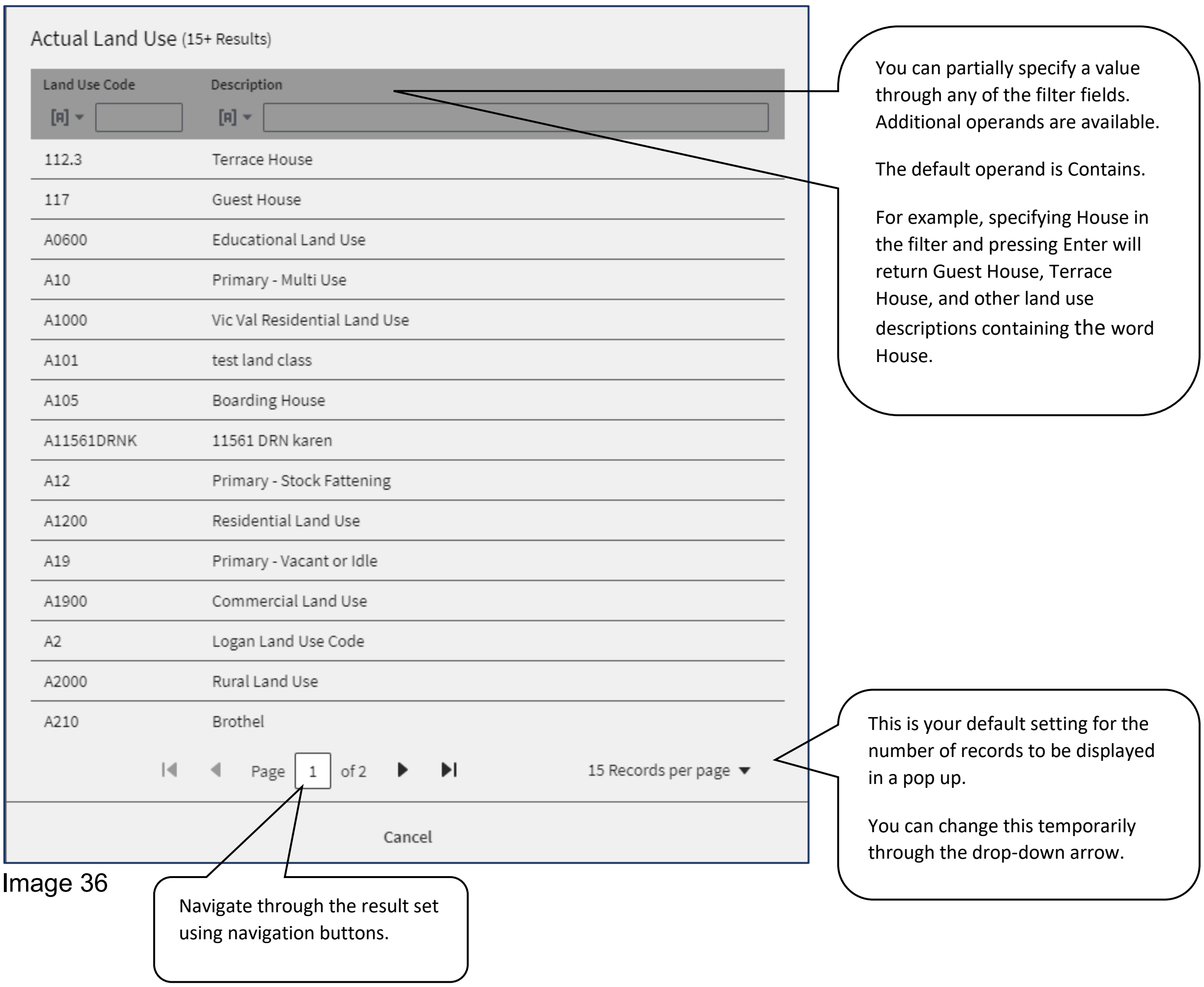


Image 36

The number of records returned is available at the top of the pop-up window, until you navigate to the last page it only reflects what you have displayed.

j. Function Keys

The UX Client does not have shortcut keys as they are not available as UX is a browser based.

UX can be run in multiple browsers and is device independent. This means the interface must be standard across a Windows PC, laptop, iPad, Android phone etc.

Using F9 as an example, it is not available to all those devices and so Shortcut keys are not supported in our UX standards.

k. Working with Grids

Grids are used where multiple records are displayed on a single form.

For example, the Dimension Maintenance form in the Application module contains a grid.

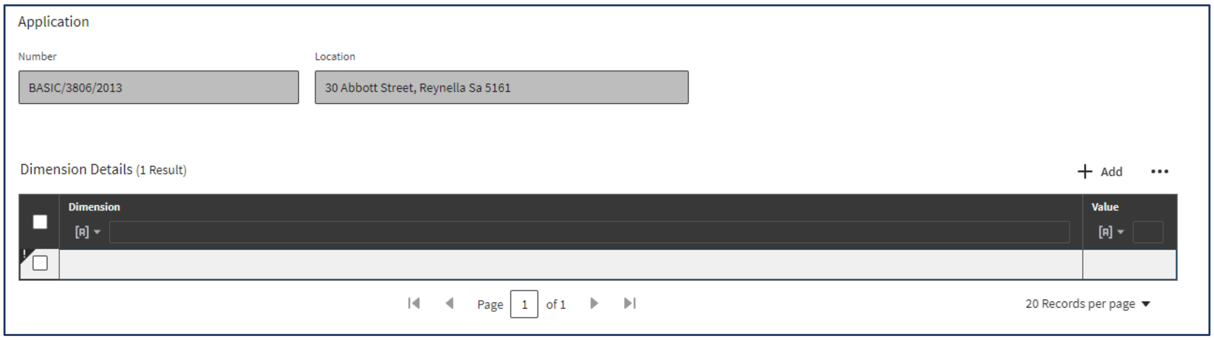


Image 37

To add a new blank record to the grid, click **+Add**.

Maintain the records as you usually would.

l. Searching

Where there are many records within the grid, use the filters at the top of grid to search the data within the grid.

Additional operands are available. The default is Contains.

m. Exporting to Excel

Select **More > Export to Excel** option to export the content of the grid to Excel.

Image 38

The file is displayed at the bottom of the browser page. This is standard grid behaviour across Pathway UX.

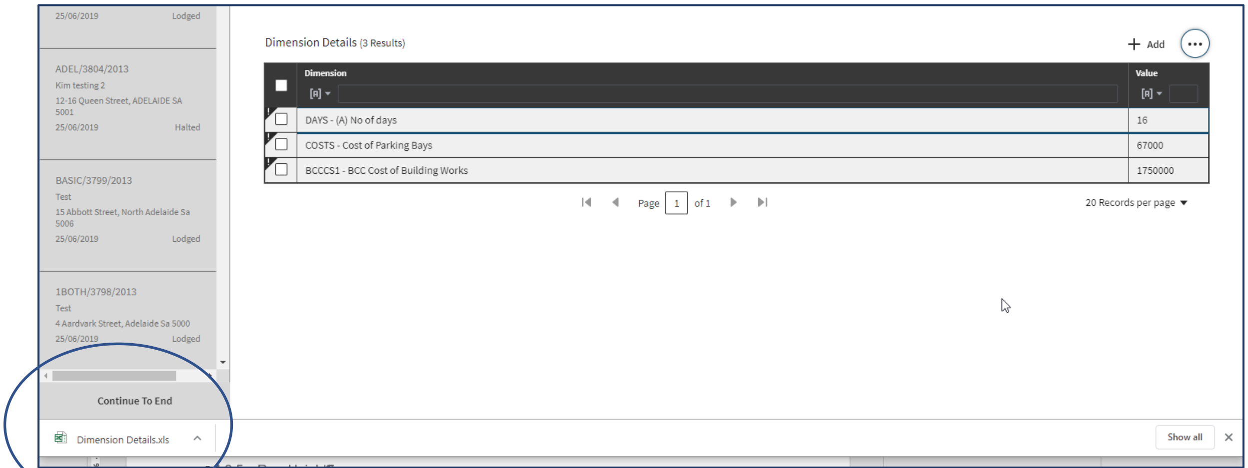


Image 39

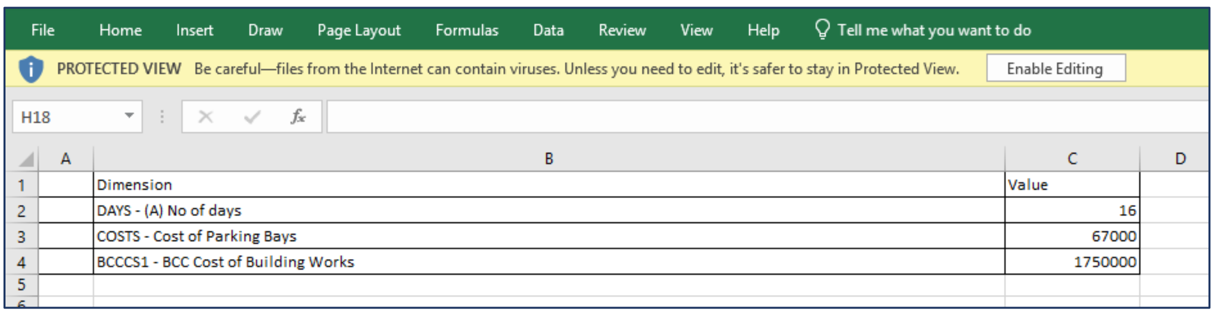


Image 40

n. Deleting a Record

To delete a record from the grid, select a check box and a new row is displayed at the top of the grid with the Remove button available.

Image 41

o. Row Height

You can change the row height for the grid temporarily through the More button.

For example, select More > Row Height > Short in the Dimension Details grid.

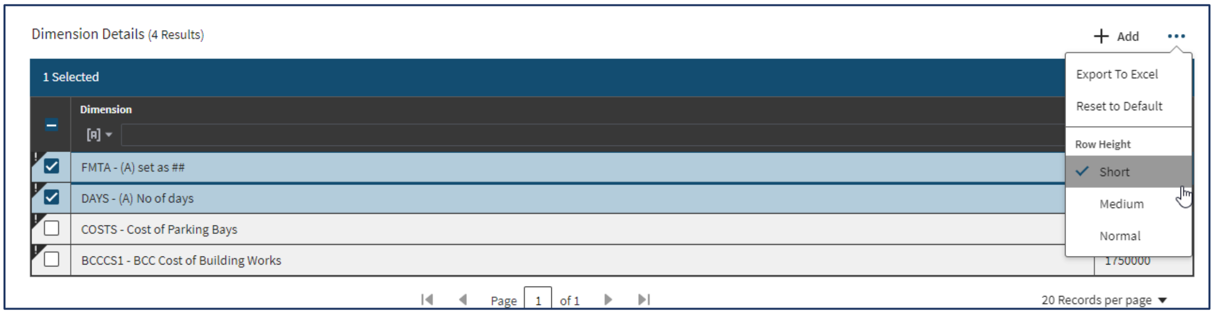


Image 42

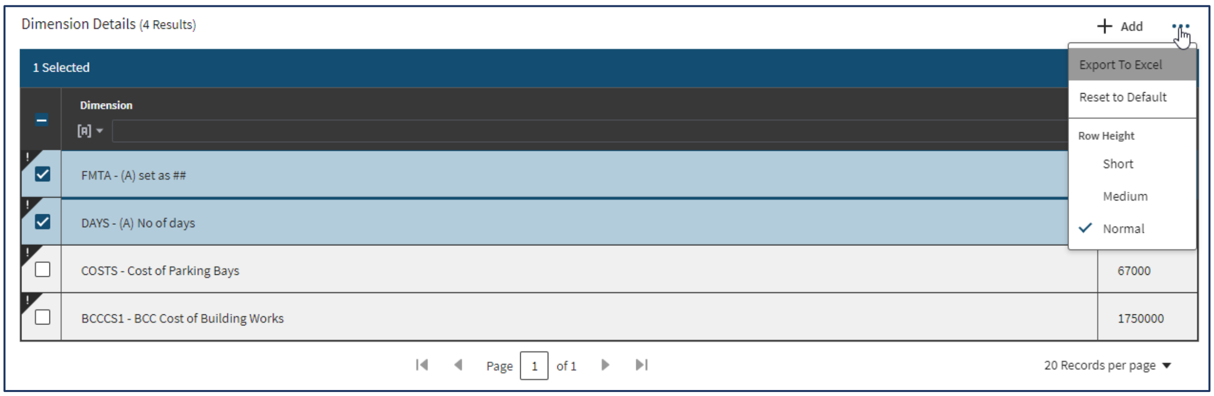


Image 43

p. Errors

Errors within the grid are displayed with a red exclamation mark.

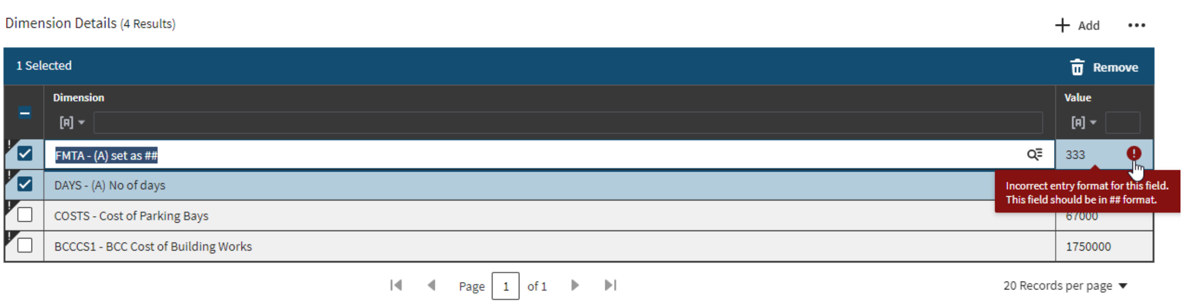


Image 44

On the left of the grid are information messages. Rest the mouse pointer on the information icon to display the tooltip.

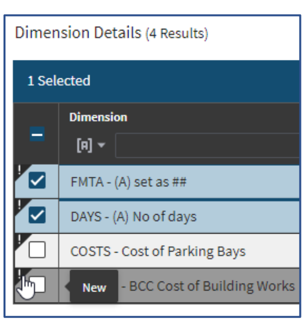


Image 45

q. Other Menu Options Through the Grid

You can view other maintenance options in some grids.

There is a limit to the number of options available at the top of grid. You can access these additional maintenance/enquiry options using the **More** button.

For example, click the **More** button to view the additional options in the Owners Names option in Animal Maintenance.

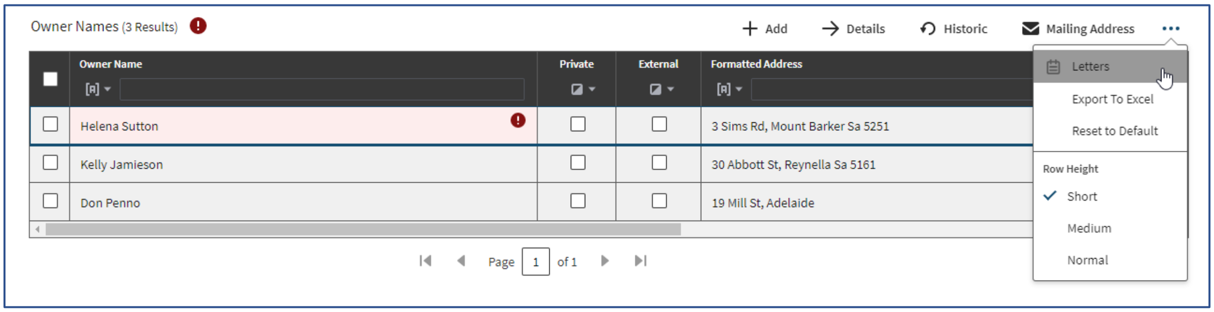


Image 46

r. Truncated Text

Text is sometimes truncated in the last column of a data grid because the text is wider than the last column. To view text that is truncated in the last column of a data grid:

- Hover the mouse over the righthand side edge of the column header until the mouse cursor changes to a resizing handle.
- While the mouse cursor is a resizing handle click and drag to the right.

This will result in a horizontal scrollbar being added to the bottom of the data grid. The rest of the text in the last column can then be viewed by scrolling the horizontal scrollbar at the bottom of the data grid to the right.

s. Working with Swap-Lists

A swap-list is a layout where the user can select from one column of data and move it to another. In previous versions of Pathway, swap-lists were referred to as Select/Remove forms.

In this example, a button is available on the Assigned section of the swap-list. When clicked, the user can move the selected data to the next maintenance form.

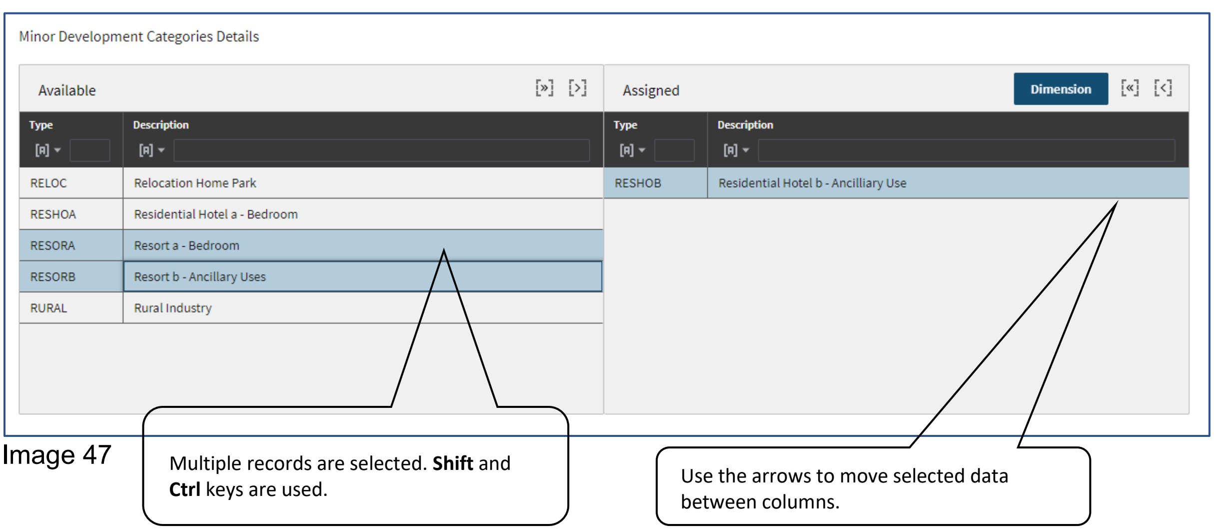


Image 47

t. Screen Print

Use the Snipping Tool provided by Microsoft, or an equivalent. You can choose to save the snip, print, copy to a Word document, or use Windows Print Screen function to copy to the clipboard.

u. Auditing

Auditing is available on all Maintenance/Enquiry Forms. It is not available on Summary Forms. It can be found on the forms Options button, Image 48.

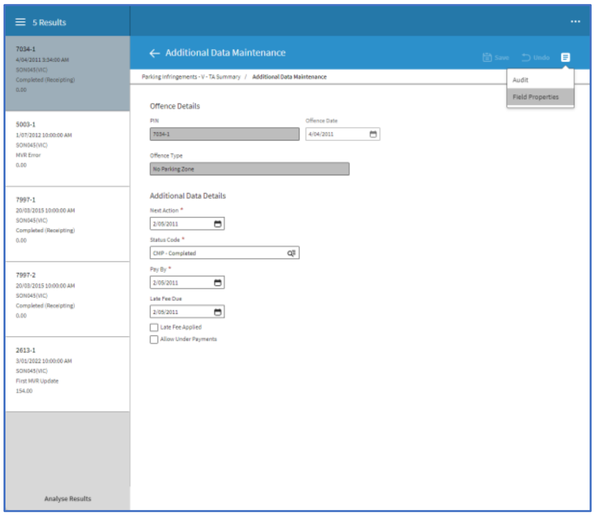


Image 48

v. Working with Profiles

Profiles provide a mechanism where multiple field values on a Search or Report form can be saved and reused. Once created, profiles can be updated or removed. The Search or Report can then be run using the field values saved in the Profile.

A default profile can be set, so that when the form is opened the values from the profile are automatically displayed on the form.

Profiles may be created for the individual User; in which case the end user creates them.

Alternatively, a Profile may be created for all users that access the form. A System Administrator setting nominates who can set up these types of Profiles.
Nomination of these users is set up in System Administration >> System Parameters >> System Function Maintenance and assigned to the PUBLICPROF Function.

Example 1: You are performing Property Maintenance for all of Dunn Street and this may take you a few days. You can create a Profile so that each time you open Property Maintenance, Dunn Street will be loaded and automatically searched.

To set this up:

- Fill in the Search Profile with the criteria you require.
- Select the More Button >> Profiles >> Manage. Listed underneath are the profiles that you have set up previously, Image 49.

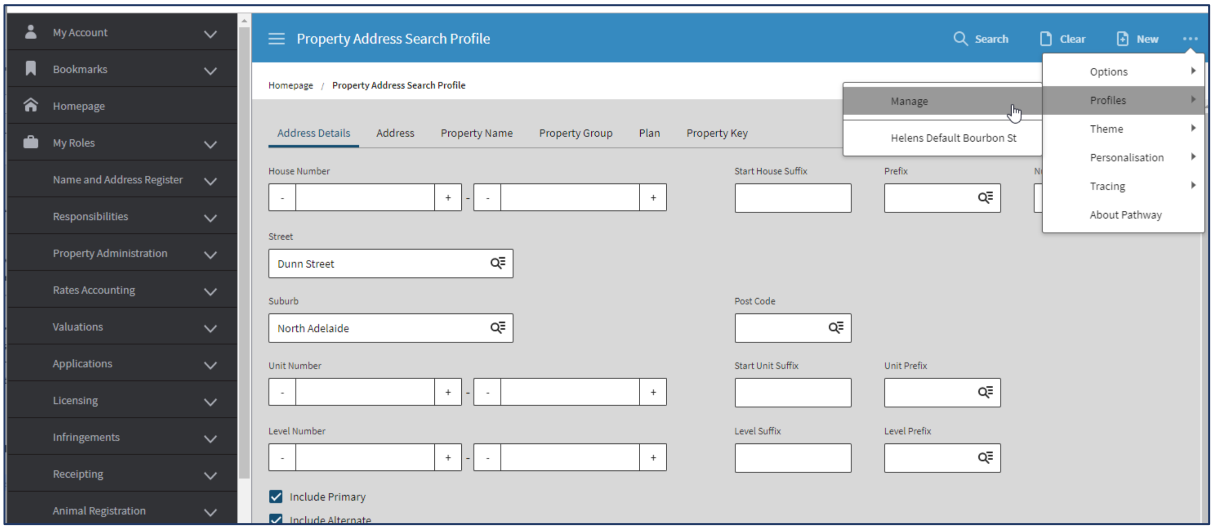


Image 49

The Manage Profiles screen will be displayed, Image 50. From here you can +Add a new profile, Modify or Delete an existing profile.

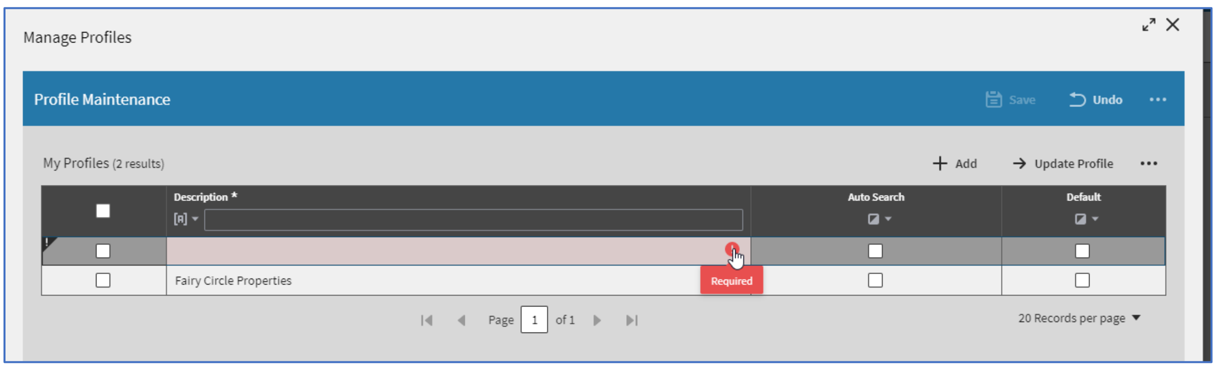


Image 50

- Enter a description for your new Profile.
- Auto Search: Check the flag on if you want it to automatically perform the search (the equivalent of pressing the Search Button for you).
- And whether this is the Default Profile. In our example you would check this on.
- Please note that any previously existing Profiles from Smart or Thick Clients are not migrated to the UX Client.
- It is recommended that screen dumps are taken of existing control forms in Thick or Smart Client where saved profiles are used, so that they can be established in UX.

Example 2: In Application Maintenance you prefer the search fields on a search profile to be closed up rather than a from to range, Images 51 and 52.

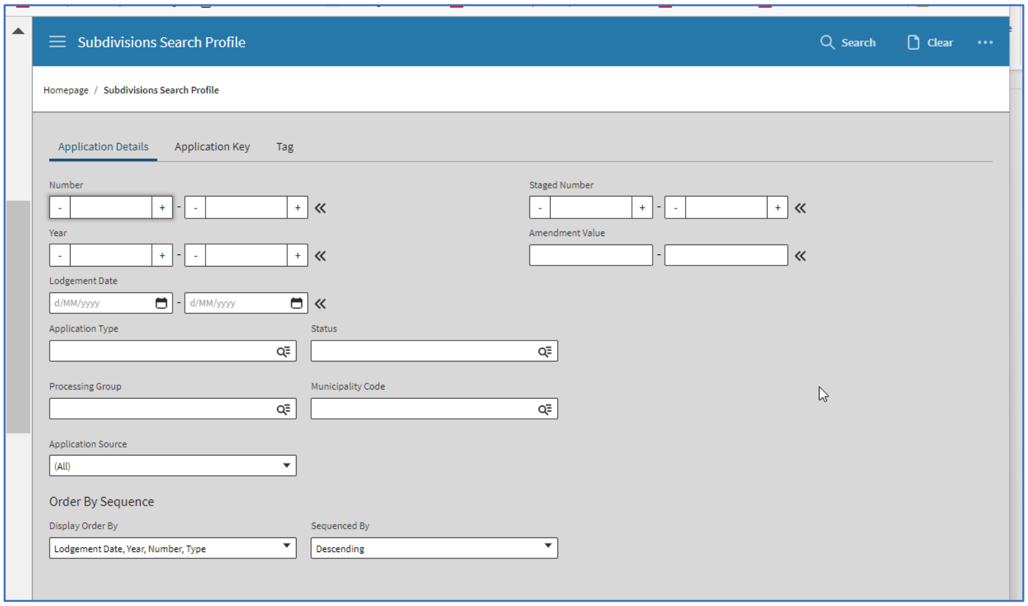


Image 51

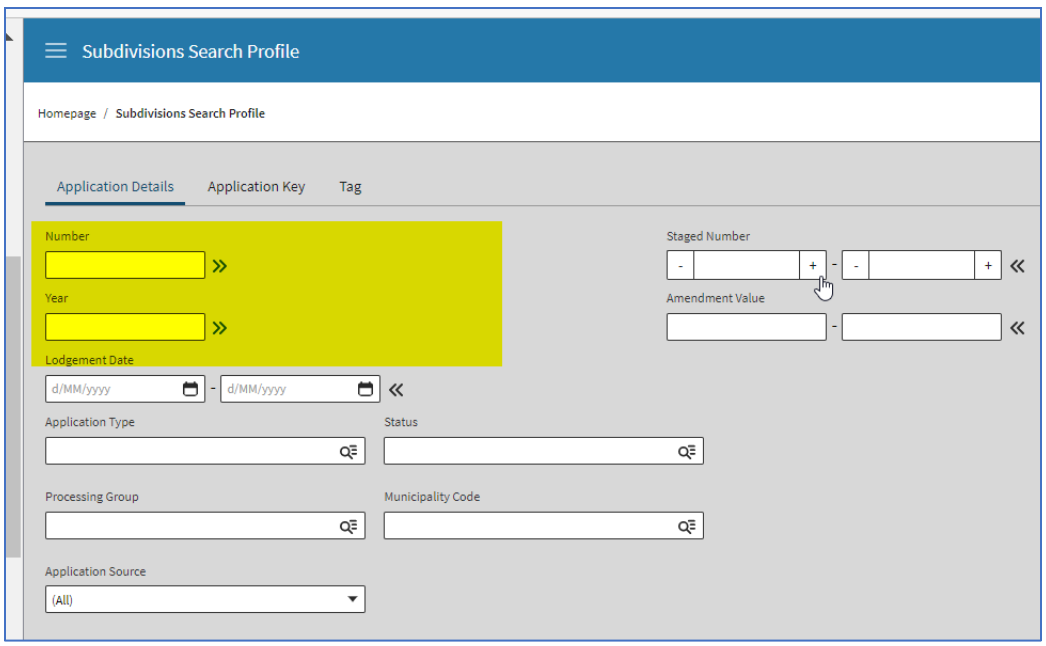


Image 52

- Fill in the Search Profile with the criteria you require.
- Select the More Button >> Profiles >> Manage.
- Create your Profile as shown in Image 53 and press Save.

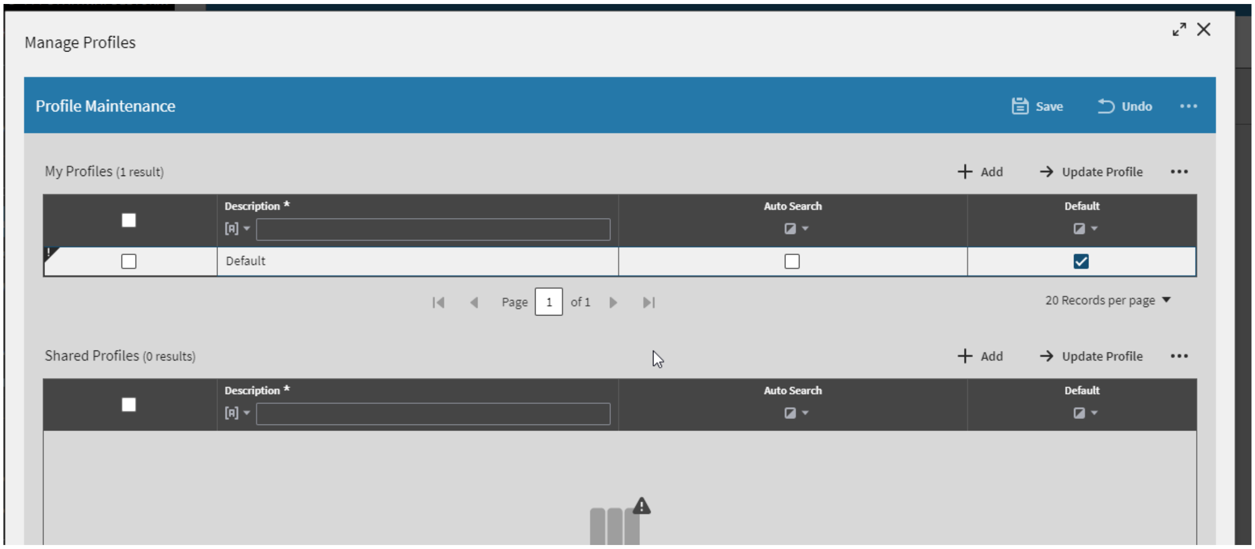


Image 53

Each time you load Application Maintenance the from to fields will be collapsed and this will need to be done for each Application Class in which you work.

6. Maintenance

One of the key changes for Pathway UX is the introduction of Summary Forms for all modules. Previously, Summary Forms were not available for some modules, for example, Animal Registrations and Infringements. Summary Forms are laid out by your System Administrator in a way that makes sense to your organisation and your work practices.

a. Selection and Maintenance

After you search for your records, the Summary Form is displayed with the matching records in the Result list.

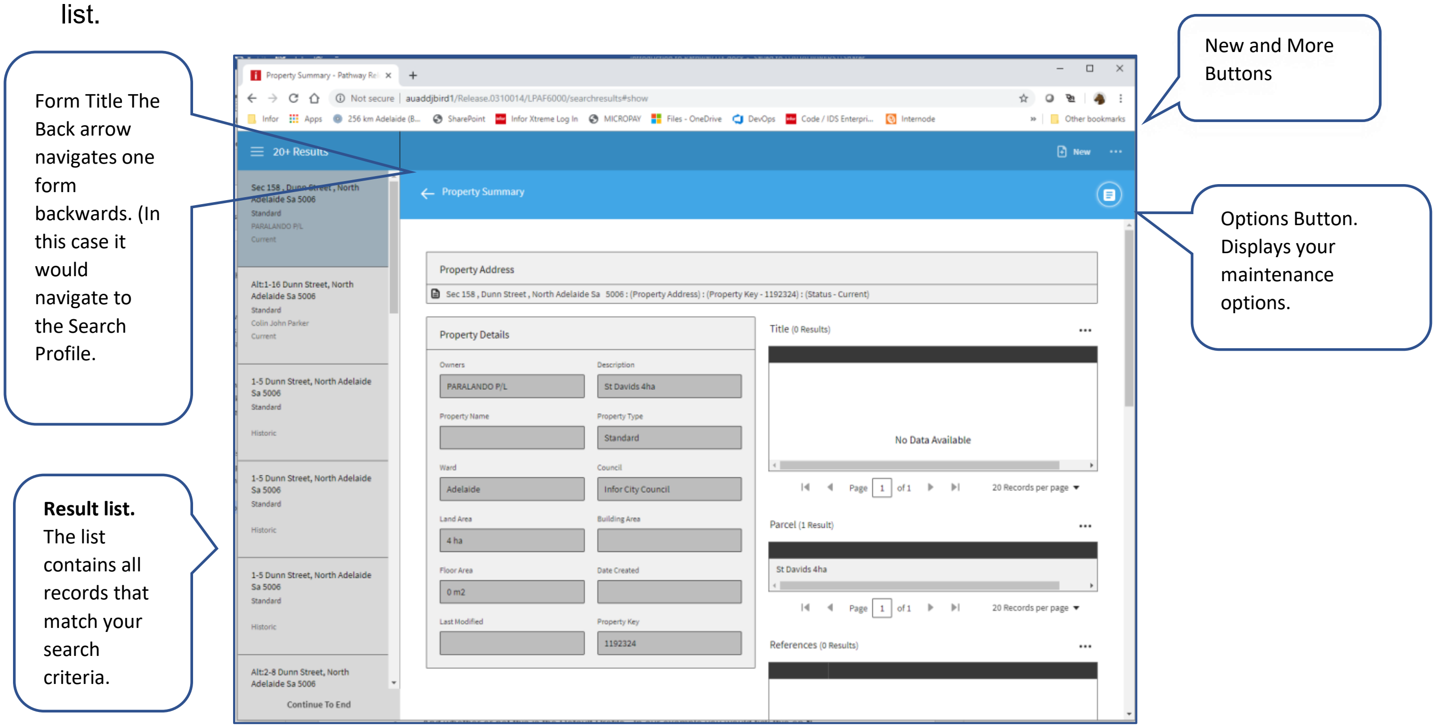


Image 54

b. Result List

The Result list shows all records matching your search criteria. When you click on a record, the record shows in the adjacent Summary Form, Image 55.

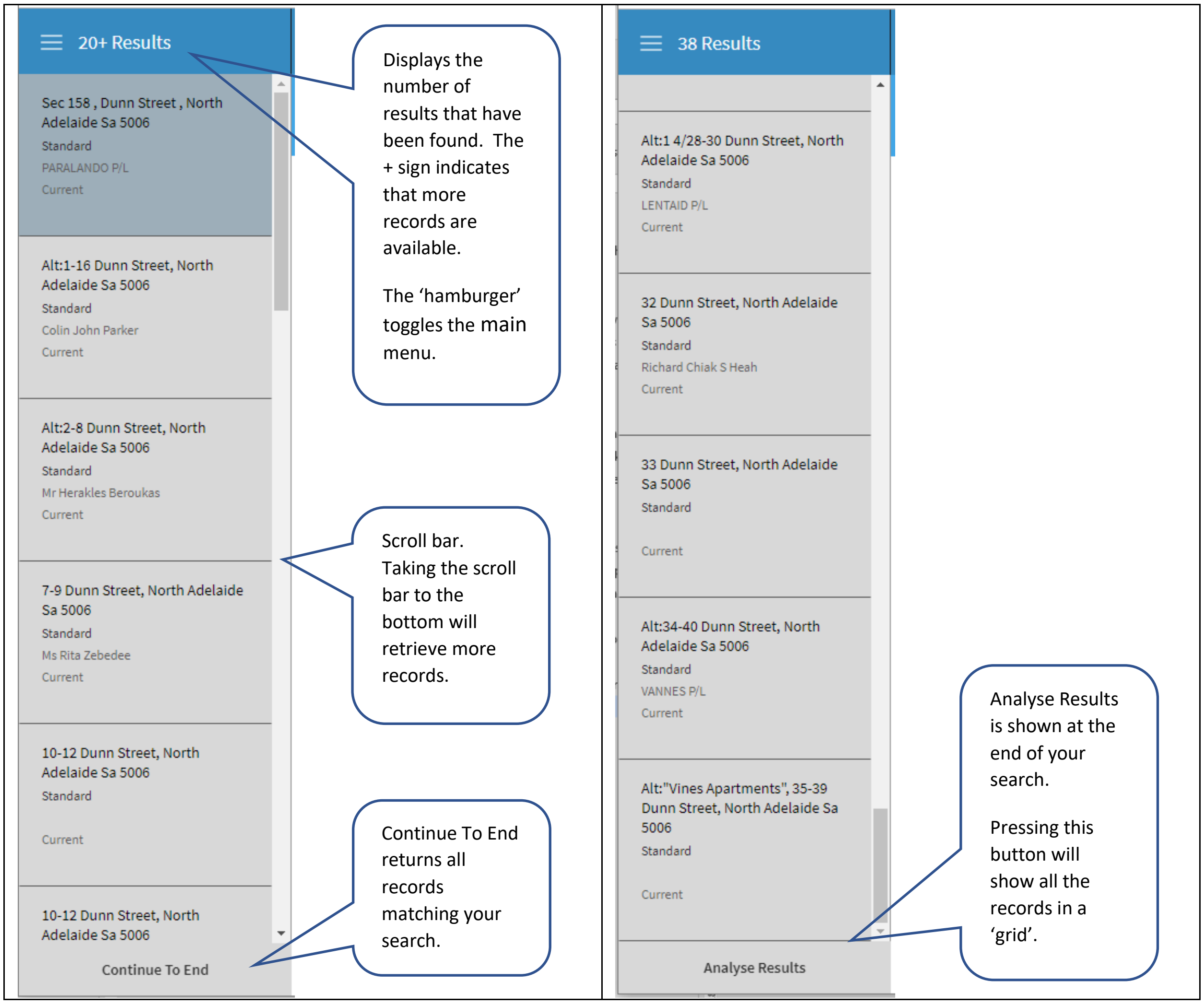


Image 55

To select all records returned from a search profile press the Continue To End button before pressing the Select All button.

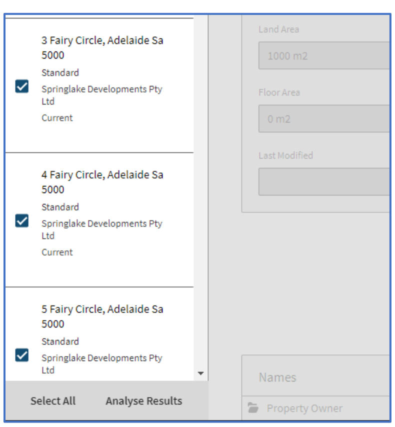
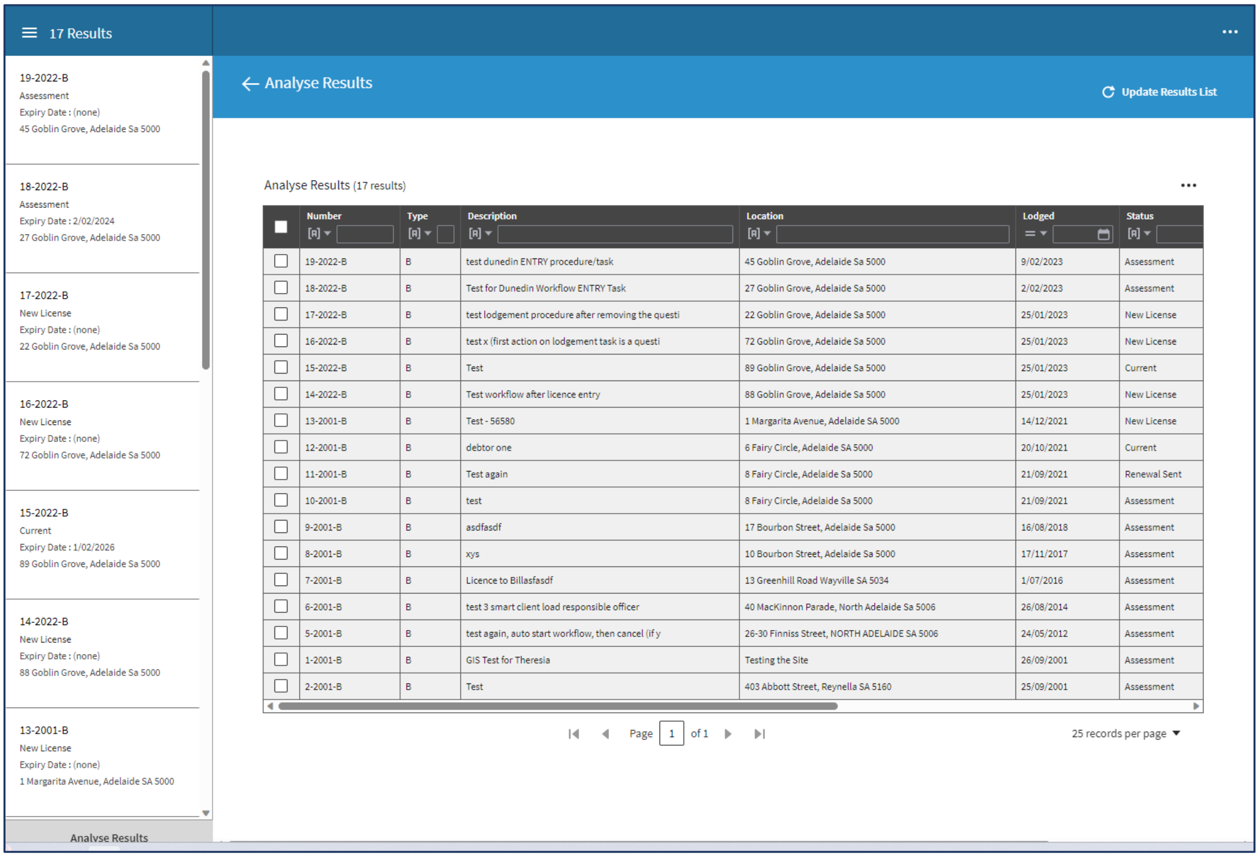


Image 56

c. Analyse Results

The search results are displayed in a grid.



Number	Type	Description	Location	Lodged	Status
19-2022-B	B	test dunedin ENTRY procedure/task	45 Goblin Grove, Adelaide Sa 5000	9/02/2023	Assessment
18-2022-B	B	Test for Dunedin Workflow ENTRY Task	27 Goblin Grove, Adelaide Sa 5000	2/02/2023	Assessment
17-2022-B	B	test lodgement procedure after removing the questi	22 Goblin Grove, Adelaide Sa 5000	25/01/2023	New License
16-2022-B	B	test x (first action on lodgement task is a questi	72 Goblin Grove, Adelaide Sa 5000	25/01/2023	New License
15-2022-B	B	Test	89 Goblin Grove, Adelaide Sa 5000	25/01/2023	Current
14-2022-B	B	Test workflow after licence entry	88 Goblin Grove, Adelaide Sa 5000	25/01/2023	New License
13-2001-B	B	Test - 56580	1 Margarita Avenue, Adelaide SA 5000	14/12/2021	New License
12-2001-B	B	debtor one	6 Fairy Circle, Adelaide SA 5000	20/10/2021	Current
11-2001-B	B	Test again	8 Fairy Circle, Adelaide Sa 5000	21/09/2021	Renewal Sent
10-2001-B	B	test	8 Fairy Circle, Adelaide Sa 5000	21/09/2021	Assessment
9-2001-B	B	asdfasdf	17 Bourbon Street, Adelaide Sa 5000	16/08/2018	Assessment
8-2001-B	B	xys	10 Bourbon Street, Adelaide Sa 5000	17/11/2017	Assessment
7-2001-B	B	Licence to Billasfasdf	13 Greenhill Road Wayville SA 5034	1/07/2016	Assessment
6-2001-B	B	test 3 smart client load responsible officer	40 MacKinnon Parade, North Adelaide Sa 5006	26/08/2014	Assessment
5-2001-B	B	test again, auto start workflow, then cancel (if y	26-30 Finniss Street, NORTH ADELAIDE SA 5006	24/05/2012	Assessment
1-2001-B	B	GIS Test for Theresia	Testing the Site	26/09/2001	Assessment
2-2001-B	B	Test	403 Abbott Street, Reynella SA 5160	25/09/2001	Assessment

Image 57

The user may double click on a row to drill through to the record.

d. Further Refinement of Results

The Analyse result grid may be further refined using the filter at the top of the grid. In the example in Image 58, we have returned all of the results of a search from the Licensing Search Profile (17 records).

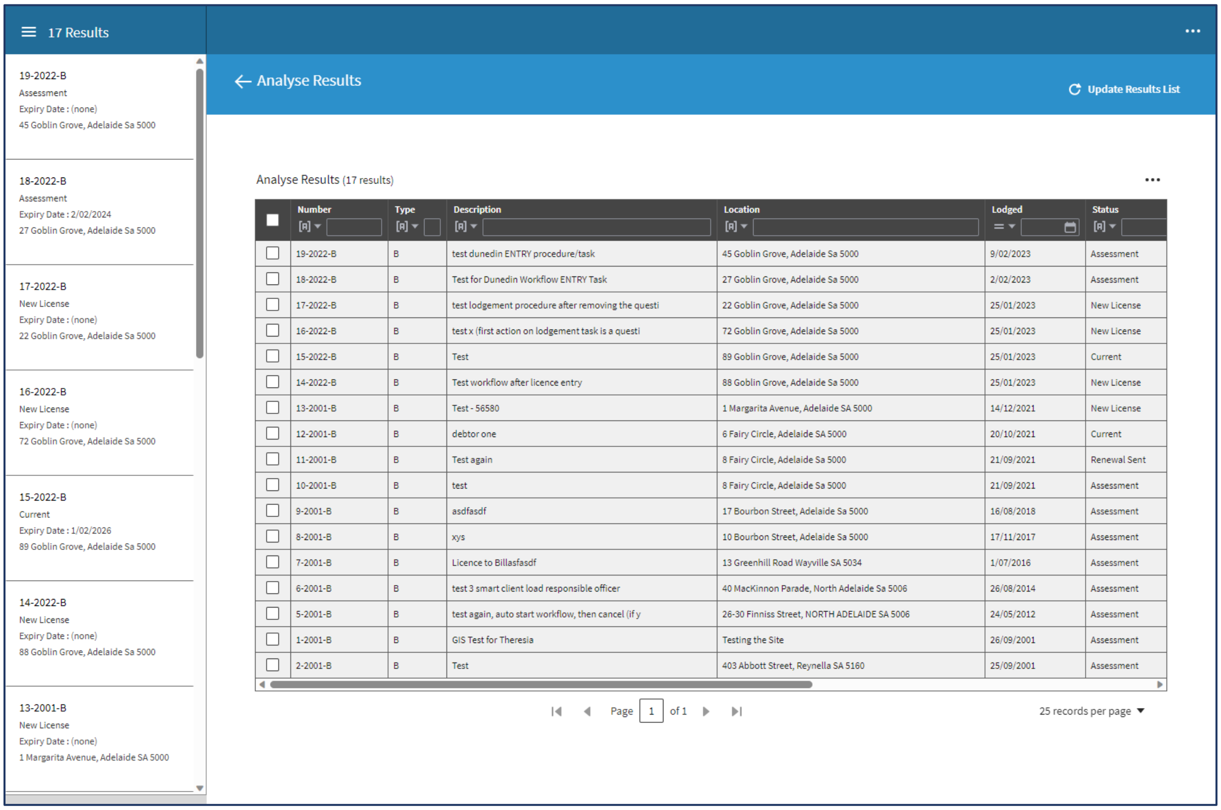


Image 58

To restrict the results to just those on Fairy Circle type Fairy into the filter at the top of the Location column, Image 59. The grid now shows those three results, Image 59.
The Result List at the left of the screen still shows the original search results. (17 records)

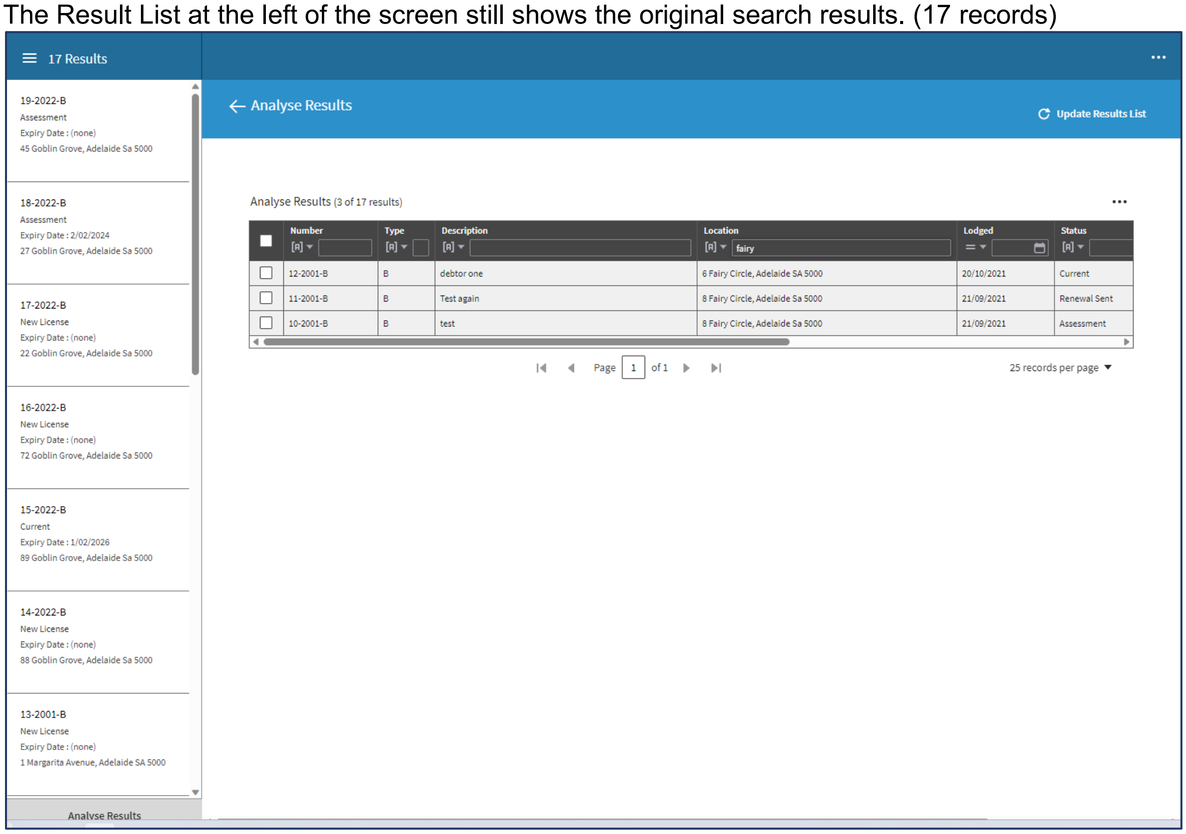


Image 59

By pressing the Update Results List button, top right Image 60, the result list now shows the records in the grid.

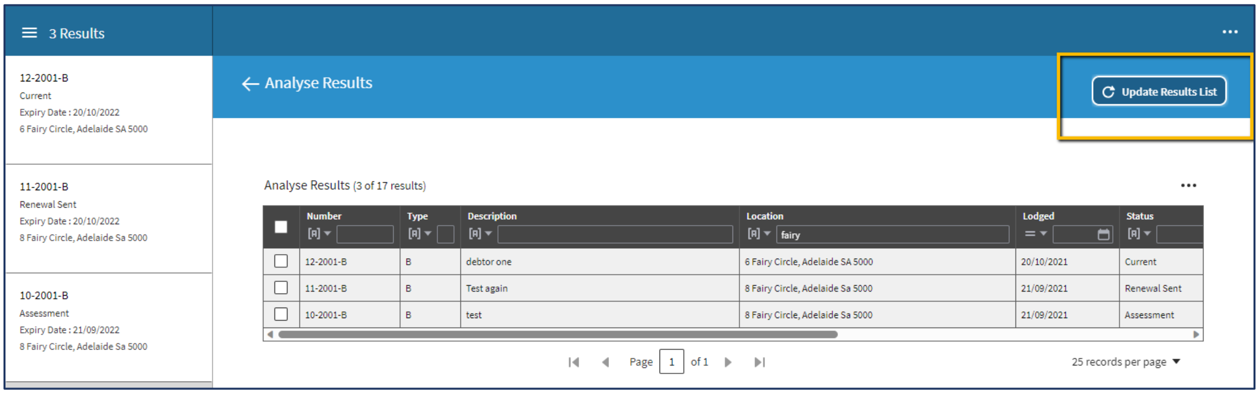


Image 60

The results could then export the grid to Excel or select one of the records that appear in the Result List. The Result List could also be used to perform bulk maintenance.

e. Memos and Conditions

Memos and conditions are displayed at the top of the Summary Form, Image 61.

f. Maintenance Options

Maintenance options are displayed using the **Options** button, Image 61.

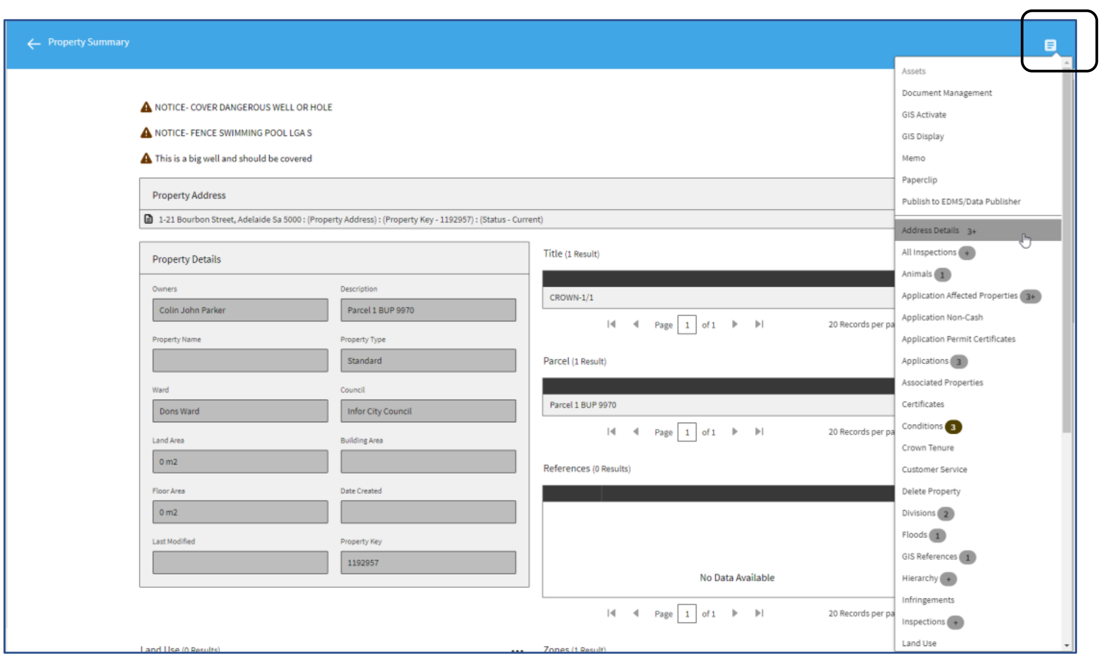


Image 61

The maintenance options to which you have been assigned will be displayed in the list.

Options that have data associated with them will display the ‘Option Badge’ and the number of records found (up to 3). Where more than 3 records are found a + sign will be displayed.

You may also double click on the Summary Form to navigate directly to the appropriate maintenance form.

You do not need to wait for the entire Summary Form to finish loading before selecting a maintenance option provided that the Urgent Memos have finished loading.

g. Summary Form Preference

The Form Preference option is found at the bottom of the Options list. For the Home page, it is found under the More menu.

With this option, you can hide or show the Summary Form Parts that are relevant to your roles and move them into the desired display order. The Summary Form Preference settings are saved for your User Id.

To hide a specific Part from the Summary Form:

- Use the grid filter to search for the description of the appropriate Part.
- Check off Visible to User and Save.

To show a specific Part to the Summary Form:

- Use the grid filter to search for the description of the appropriate Part.
- Check on the Visible to User and Save.

To change the order in which Parts are displayed on the Summary Form:

- Use the grid filter to limit the display of rows to those where the Visible to User column is Selected.
- Select a single Part and use the Up / Down Arrows in the grid header to move into the desired display order and Save.

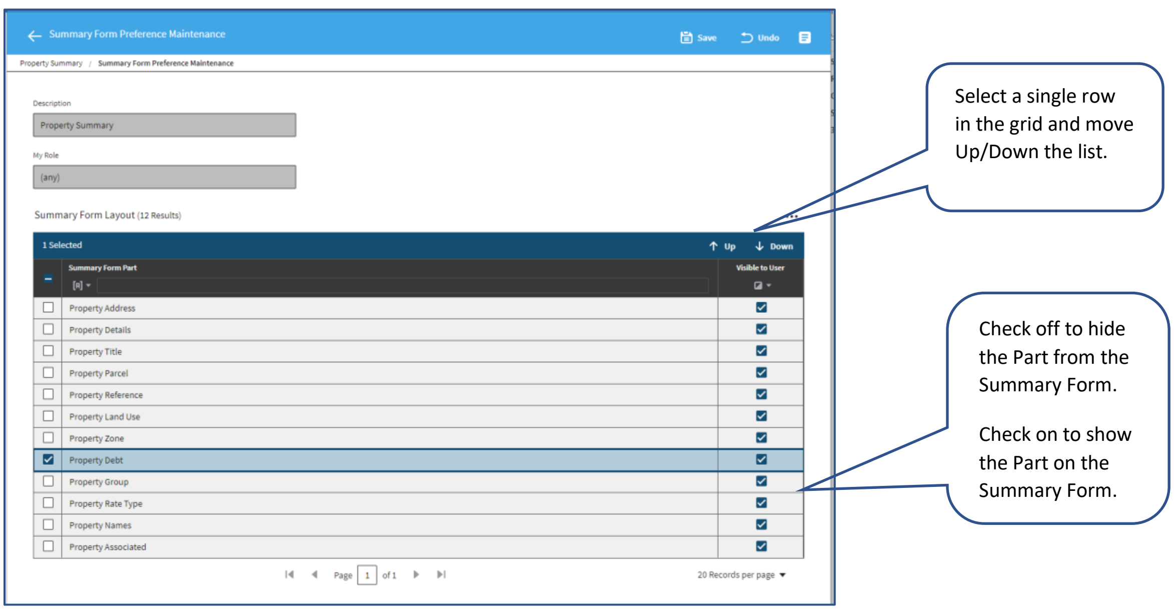


Image 62

h. Home Summary Form Chart Parts

Home Summary Form Charts are defined by your site and only available for the Home Summary form.

As with other Parts, the Form Preference option can be used to hide or show the Home Summary Form Charts that are relevant to your roles and move them into the desired display order.

i. Module Summary Forms In-Context Chart Parts

In-Context Charts are defined by Council and only available on the module Summary Forms.

As with other Parts, the Form Preference option on each module Summary Form can be used to hide or show the In-Context Charts that are relevant to your roles and move them into the desired display order.

j. Navigation

You can navigate through maintenance options using the breadcrumbs or the back arrow button next to the Form Title. You cannot navigate using the browser back arrow.

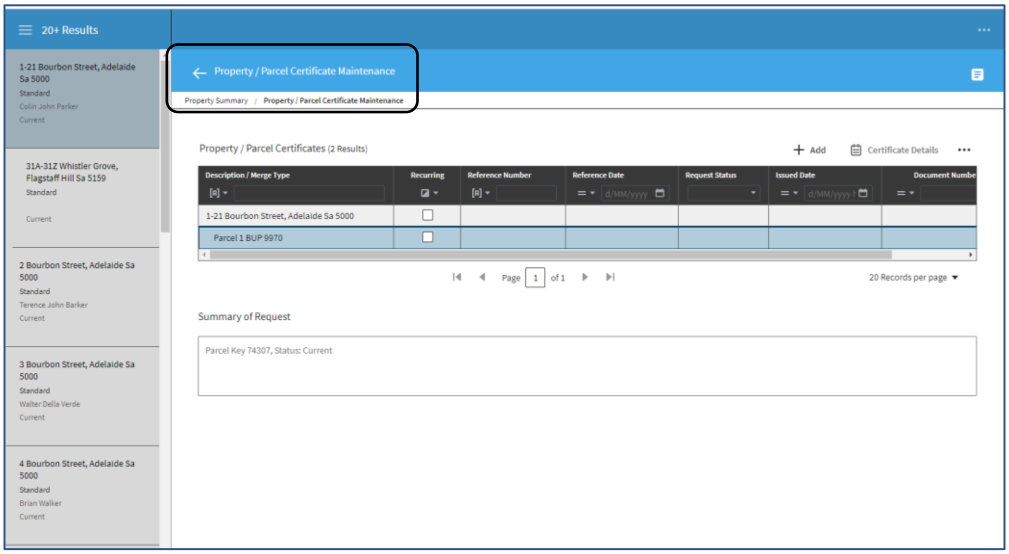


Image 63

k. Multi Record Maintenance

On some maintenance forms the user can select other records directly via the Result List without returning to the Summary Form. This is not available on all maintenance forms.

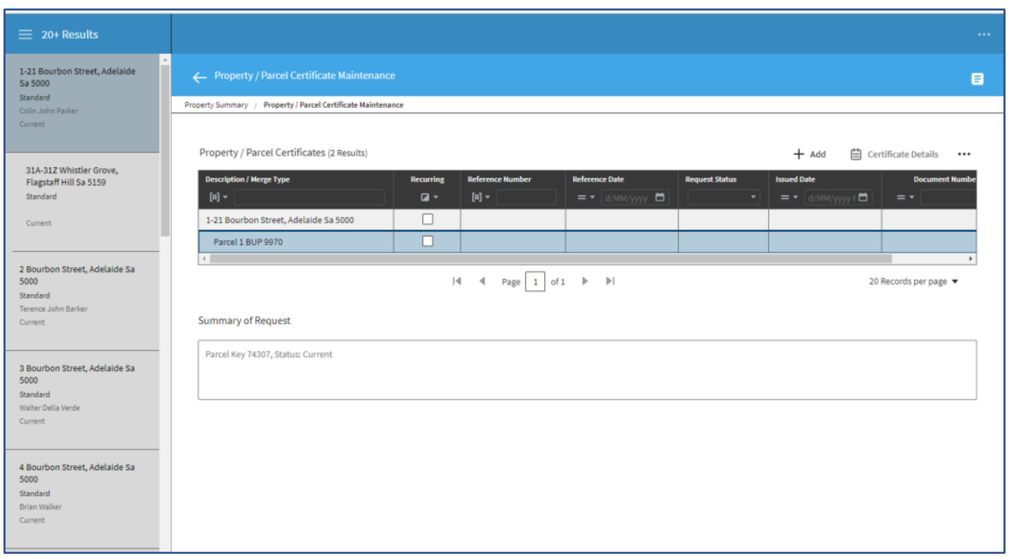


Image 64

In the example in Image 64, we have chosen the Certificate Maintenance option. Because other records in the result list are available the user may click on another record. If multi-record maintenance is not allowed the other records in the result list will be dimmed.

l. Bulk Button

The Bulk slider button is now displayed at the top of the Summary Form.

To perform bulk maintenance:

- Specify the data into the Search Profile and click Search.
- The Result List is displayed and the Summary Form is presented for the first record.

- The Bulk slider button is now displayed at the top right-hand corner of the page.
- To initiate Bulk Maintenance, click to move the Bulk slider button to the right, Image 65

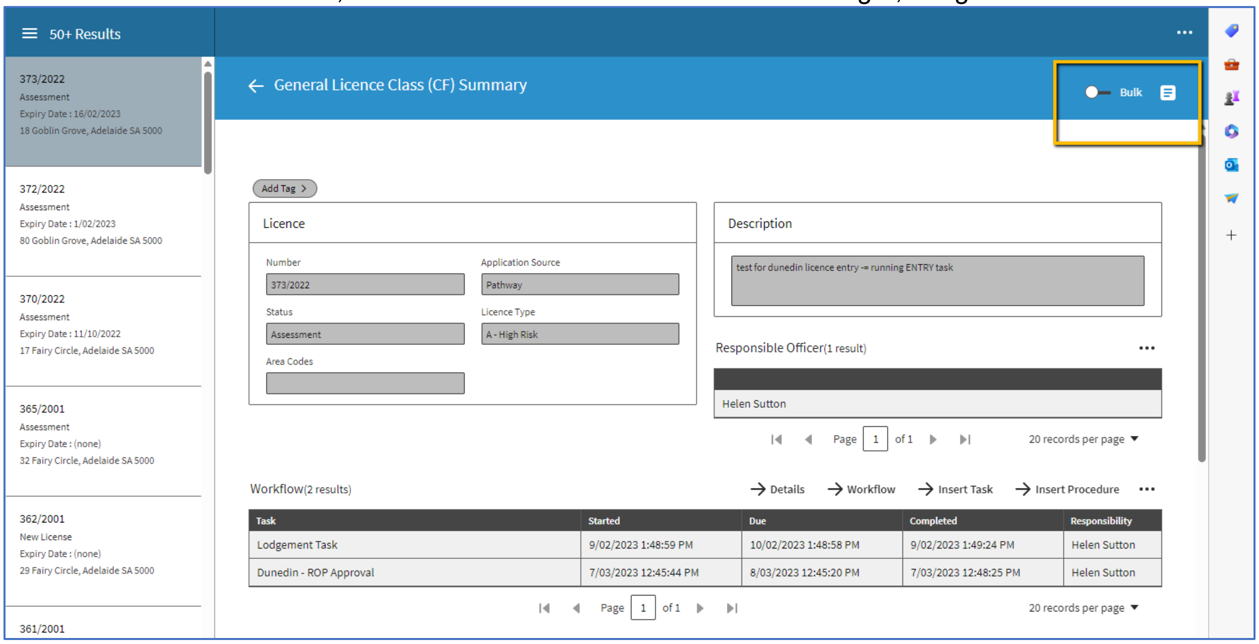


Image 65

The result list is displayed with a check box against each record matching your search criteria, Image 66.

The standard Options button is not displayed. Select the check box for each record to be included in the bulk maintenance. The available Bulk Maintenance Options are then displayed. Select one or many options to the right hand pane. Where more than one option is selected the functions will be performed in the order that has been selected.

Press Continue and the first maintenance form is displayed. Click Save and once the save is complete, the next bulk option is presented.

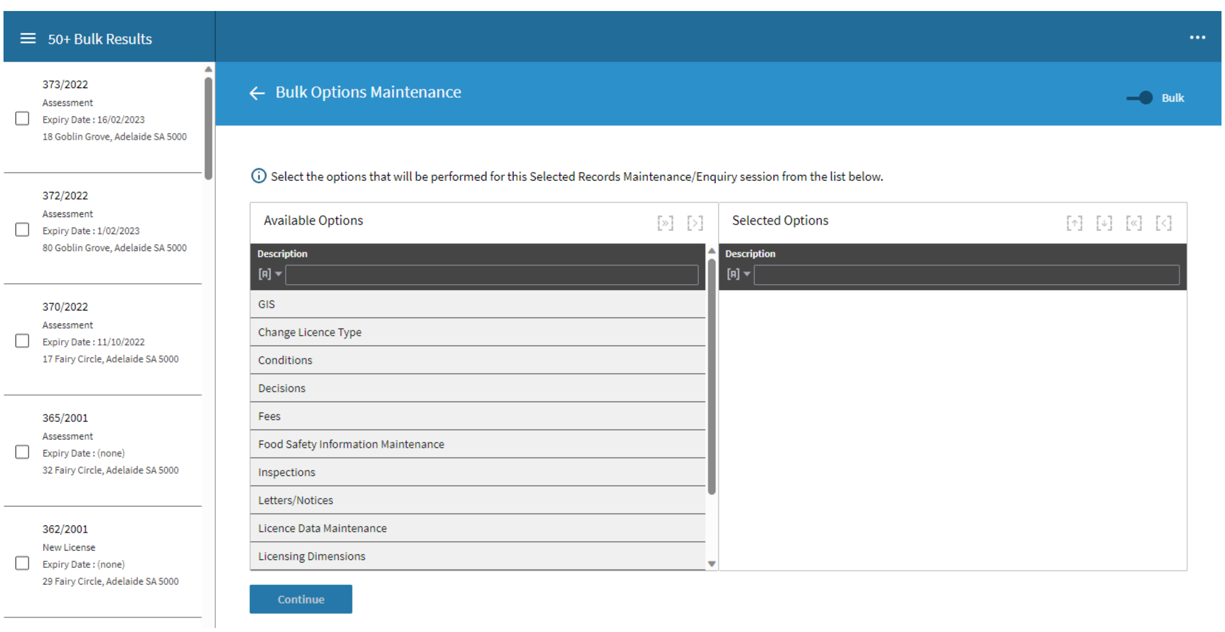


Image 66

m. Select All

Select All has been added to the bottom of the search profile results. The Select All button will be available whenever multiple records can be selected, including Bulk Maintenance. To select all records returned from a search profile press the Continue To End button before pressing the Select Al button.

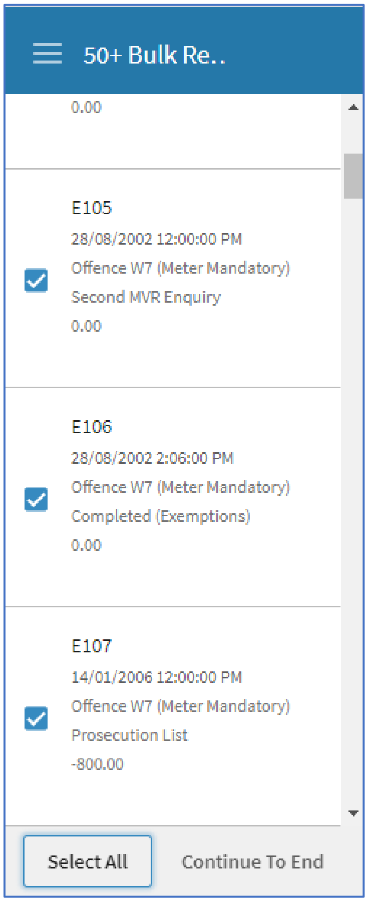


Image 67

n. Maintenance Options on Sub-Forms

Some maintenance options can in turn call other maintenance options. An example of this is Application Data Maintenance in the Applications module. Options are accessible through the Options button on the maintenance form, Image 68.

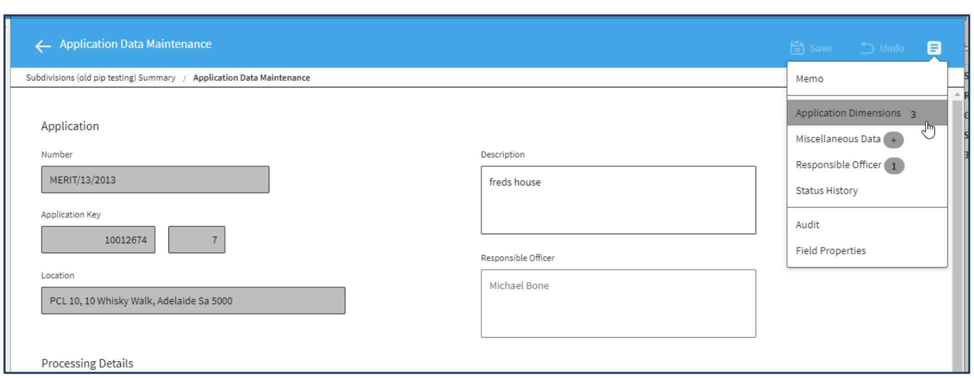


Image 68

o. Stand-Alone Forms with Options

Forms directly from the menu may have options to navigate to a sub-form. This is available from Options Button on the form. For example: Information Type Parameters shown in Image 69.

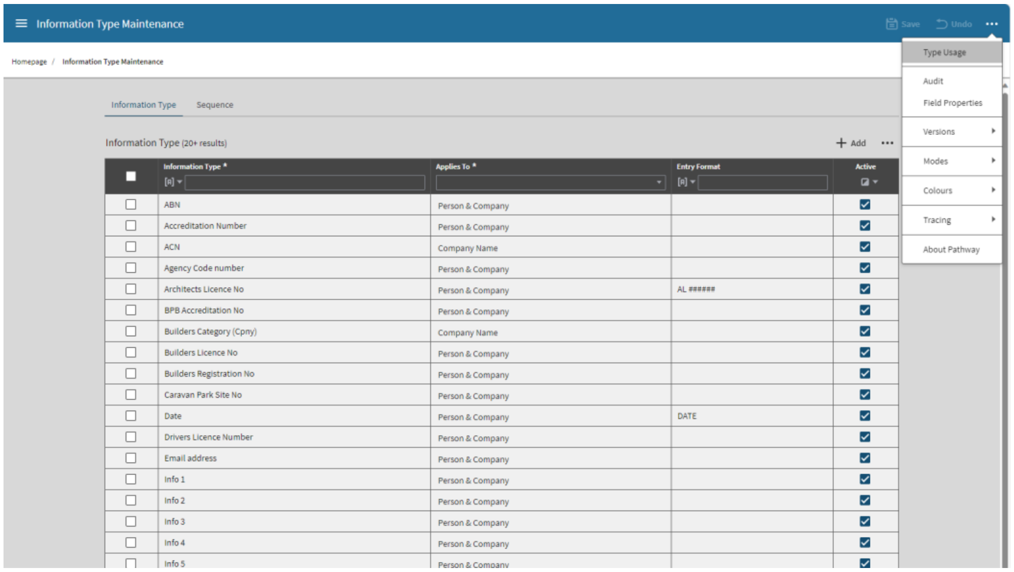


Image 69

p. Other Maintenance Notes

For some maintenance options, a new browser window is opened in Pathway UX. This is intended behaviour. For example, the Flood Maintenance in Property is opened in a new browser window. The back arrows can be used or simply close the browser window. If you have visited other browser pages or programs during your maintenance session, then you will be returned to those rather than UX Home.

7. Running Reports

You can run reports in Immediate mode or submit reports to Batch Queues for later processing. You can save the report criteria to a Profile. The notable difference in UX is that printing output can now be to your browser.

a. Report Options

To view the list of job options, select More > Options from the title bar, Image 70.

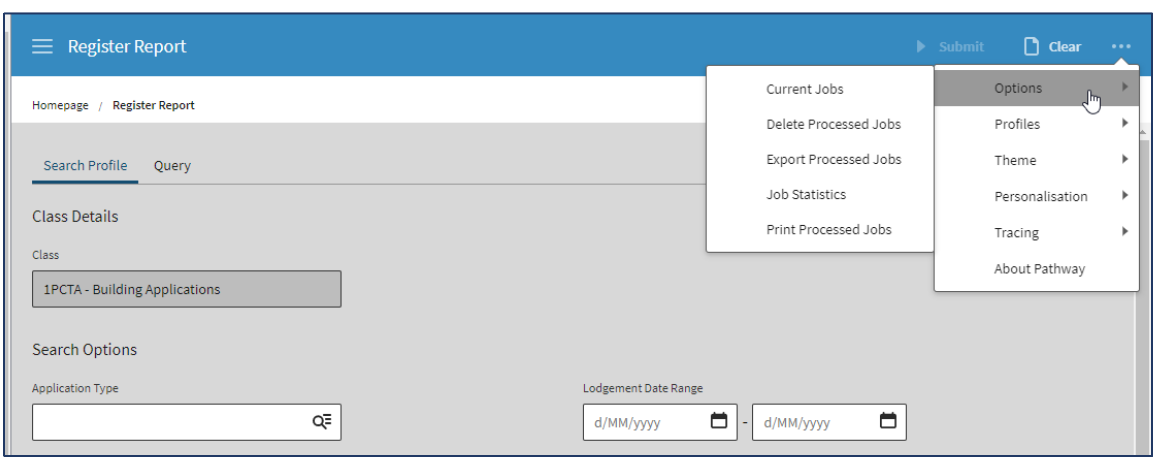


Image 70

b. Export Files

Where a job produces a file export such as the Application module ABS Report, there are two options. On the control form under Processing Options you will find the export details, Image 71.

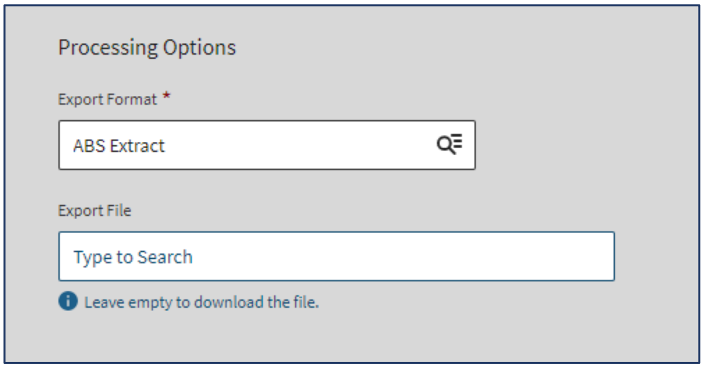


Image 71

You have the option to enter a value file name i.e. UNC path only, no mapped drives or leave the field blank. If the Export File is left blank a Download Button is available and when used the file can then be saved to another location. This method is the same as any download you would perform using a browser.

NOTE: the application server must have permissions to the file location.

c. Printing Multiple Reports

When the printing job produces multiple reports in UX, the Print Multiple Reports form will display a list of tabs above the report content section, one tab per report in addition to an All Reports tab that will merge all the reports into a single file.

8. Summary Forms

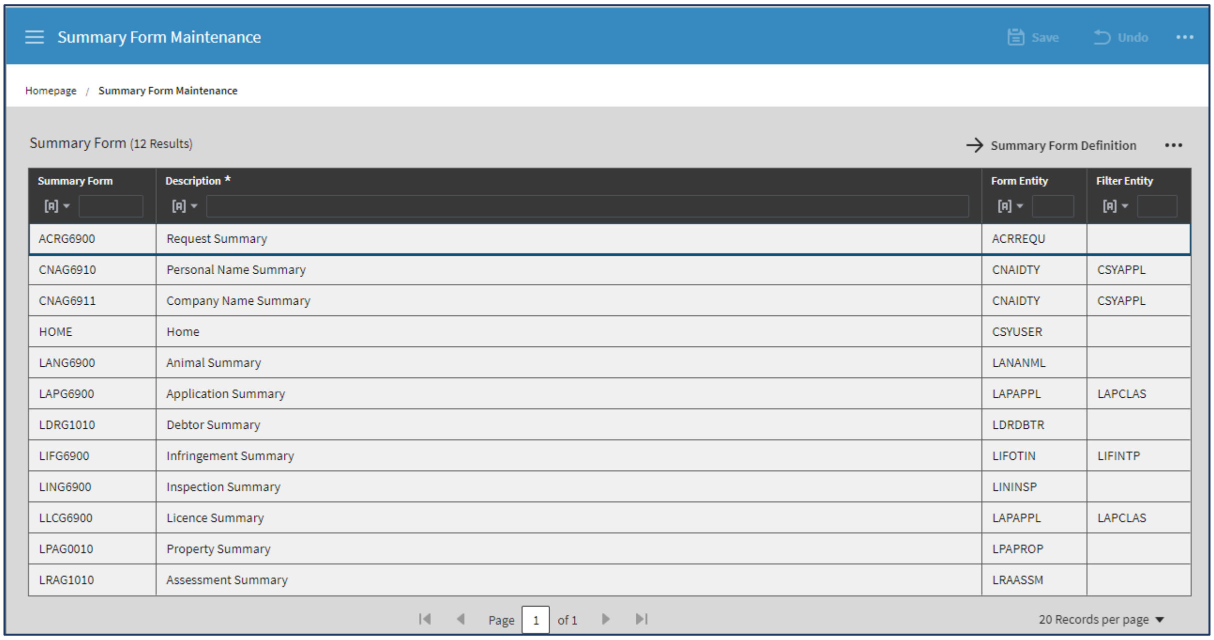
Summary Forms are available for all modules and the UX Home page. The first log on to Pathway UX will create the default Summary Form for each module and the UX Home page based on your existing Pathway Smart Client and Thick Client configuration.

The concept of My Roles has been introduced and replaces Menu Group.

Summary Forms are user definable and may be set differently for different Role Groups. For example, the Rangers may have a different Animal Summary form to the Customer Service staff. Summary Forms may also be unique down to Class/Type and even an individual User Account.

End Users have control over their Summary Form settings via the Form Preference option available to them on all summary forms. Refer to the Summary Form Preference section in this document for more information. Each individual user can specify the order in which shown parts are displayed and hide the parts that are not of interest. The hidden parts can be reinstated by the user at any time.

The System Administration >> System Parameters >> Summary Form Maintenance Summary Forms menu option allows Summary Forms to be maintained by the System Administrator, Image 72.


Summary Form Maintenance

Homepage / Summary Form Maintenance

Summary Form (12 Results)

Summary Form Definition

Summary Form	Description *	Form Entity	Filter Entity
ACRG6900	Request Summary	ACRREQU	
CNAG6910	Personal Name Summary	CNAIDTY	CSYAPPL
CNAG6911	Company Name Summary	CNAIDTY	CSYAPPL
HOME	Home	CSYUSER	
LANG6900	Animal Summary	LANANML	
LAPG6900	Application Summary	LAPAPPL	LAPCLAS
LDRG1010	Debtor Summary	LDRDBTR	
LIFG6900	Infringement Summary	LIFOTIN	LIFINTP
LING6900	Inspection Summary	LININSP	
LLCG6900	Licence Summary	LAPAPPL	LAPCLAS
LPAG0010	Property Summary	LPAPROP	
LRAG1010	Assessment Summary	LRAASSM	

Page 1 of 1

20 Records per page

Image 72

a. First Time Set-up for the System Administrator

The first time that you log on to Pathway UX there will be no Summary Forms in existence. Even the Home page will be blank, Image 73.

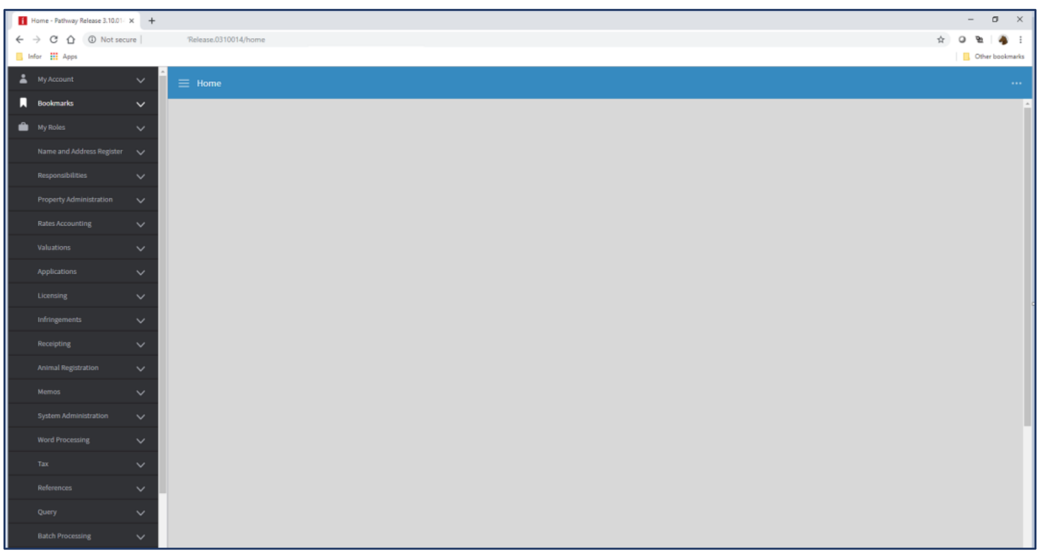


Image 73

A message will be displayed recommending that you set up Summary Forms. Press OK and you will be re-directed to Summary Form Maintenance.

Select More >> Options >> Summary Form Initial Data, Image 74.

Remember the initial Summary Forms will be built based on your existing configuration.

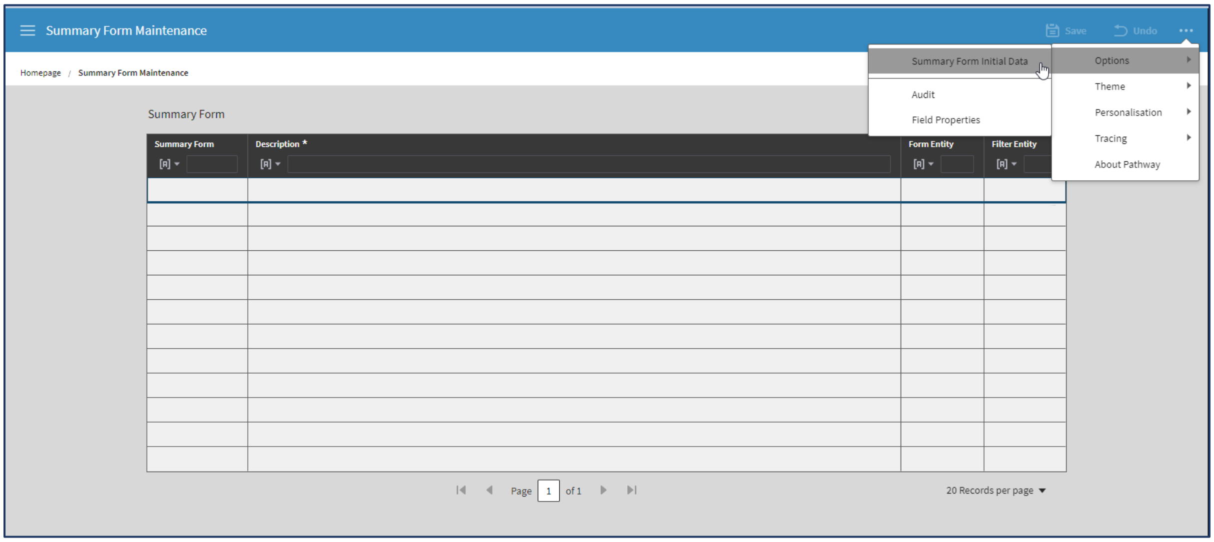


Image 74

b. Summary Form Definition

Maintain an existing, Infor provided, Summary Form or Copy/Create a new Summary Form. The Infor provided Summary Forms are available to all users. If a more targeted Summary Form is required, then a copy can be made of the default Summary Form and assigned to a particular User Role, Image 75.

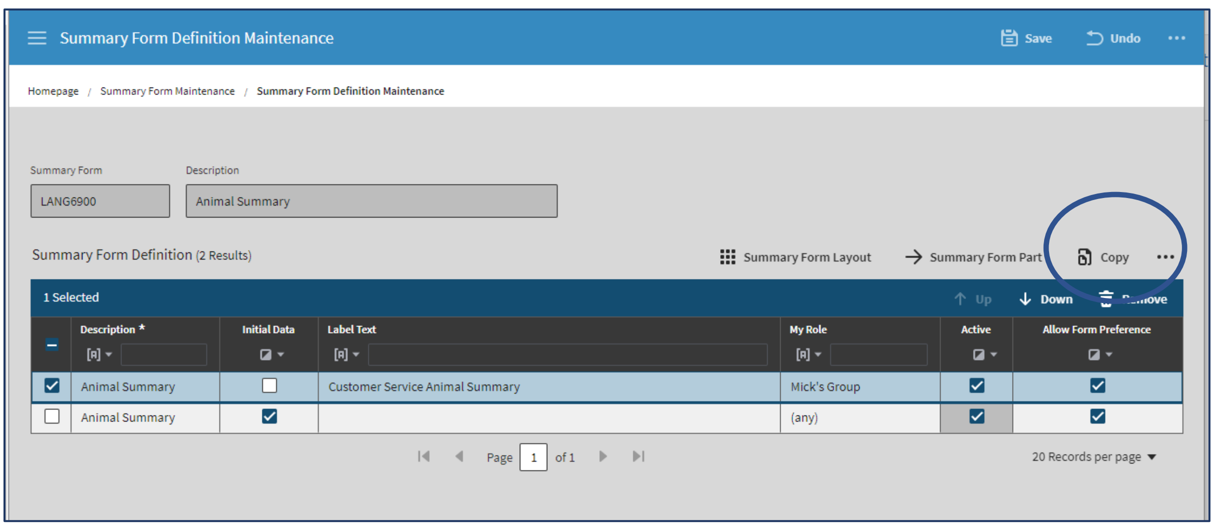


Image 75

In Images 76, 77 and 78, we are copying the Customer Service Animal Summary to create a new Summary Form for the Rangers. The Menu Group that the Rangers use is called INSPECT. The Summary Form will show Rangers Animal Summary in the Form Title.

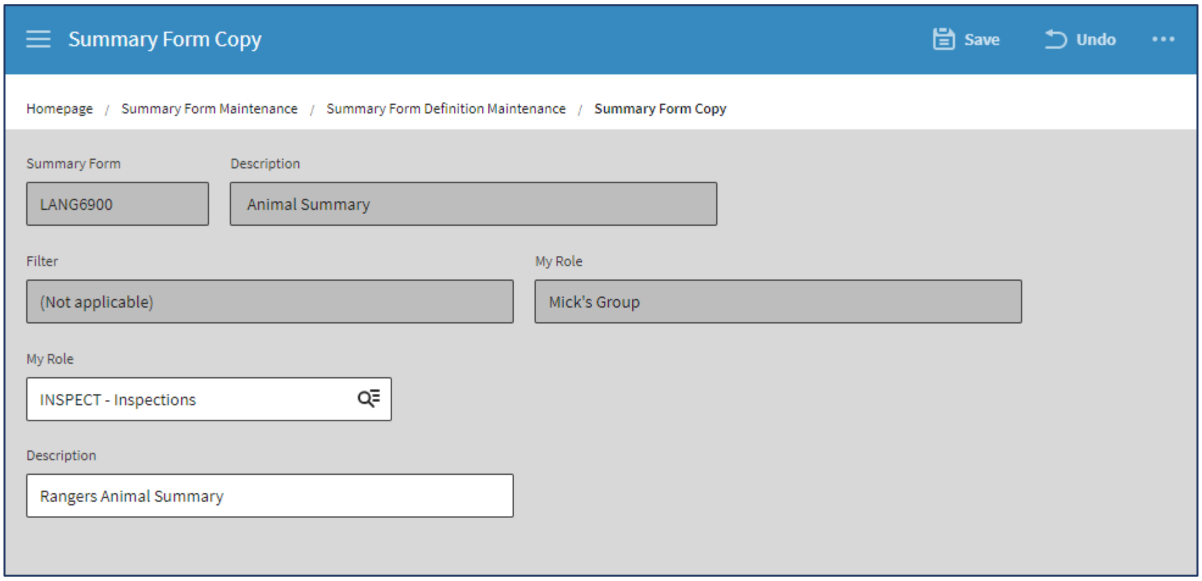


Image 76

We now have a new Summary Form that will be immediately available to the staff using the My Role of Inspections.

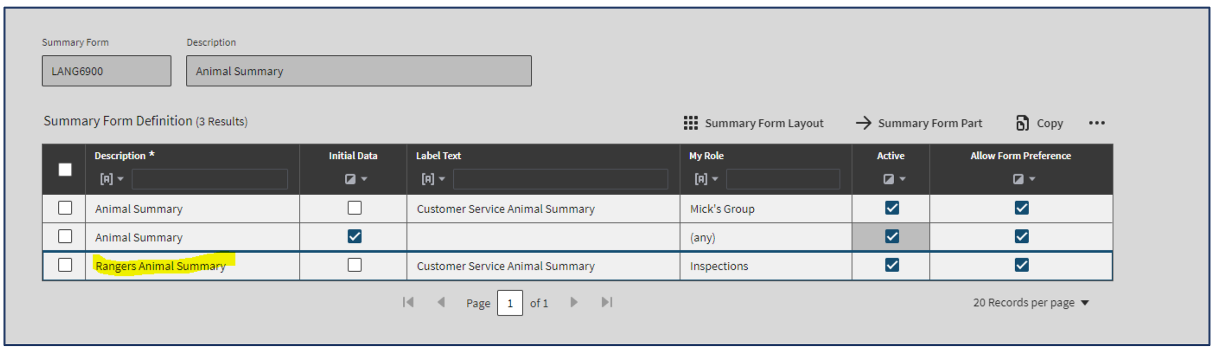


Image 77

c. Class/Type Based Summary Forms

For some Class/Type based modules such as Applications, Licenses, Infringements, Bookings and Registers it is possible to create a Summary Form that is applicable to a single Class/Type.

When the Copy is performed there is an optional field labelled Filter. For example, when copying a License Summary Form, the Filter drop down will contain all License Classes allowing you to create a Summary Form that is specific to the selected License Class.

d. Summary Form Parts

This option shows all the available parts that make up the summary form. The available parts will vary between modules, Image 78.

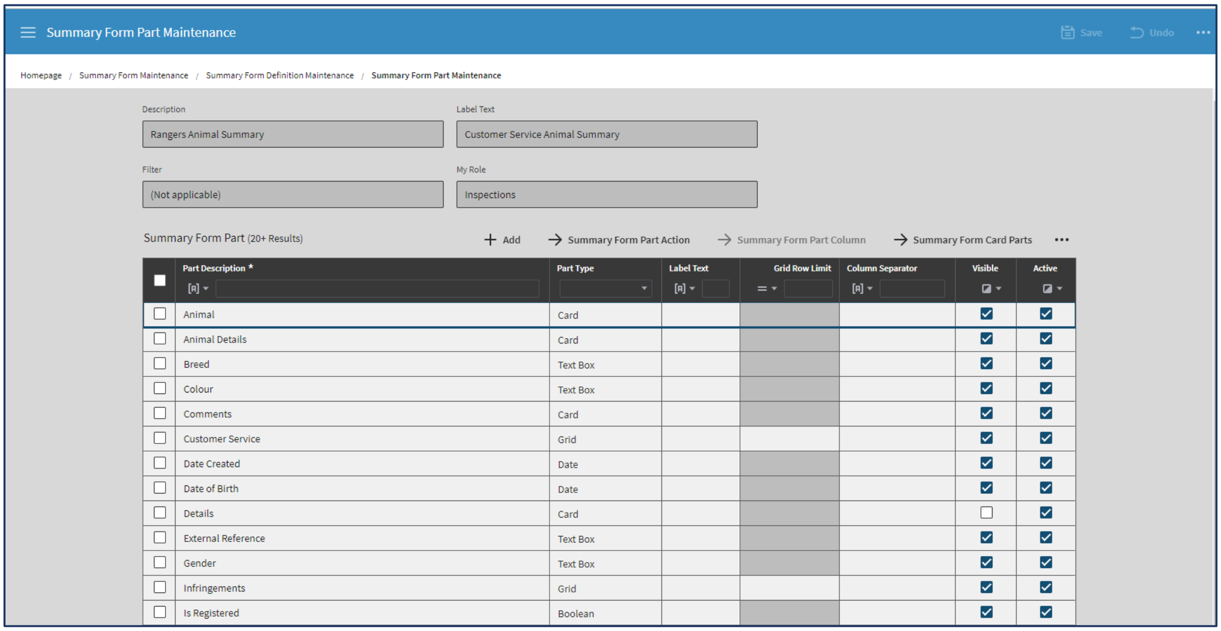


Image 78

There are various Part Types depending on the type of data being displayed. These Part Types are set and are not user definable.

Part Type	**Description**
Card	Displays multiple fields within a single frame. Drill out on Summary Form Card Parts to see the fields that may be included in the Card. You may create a Card Part and assign fields to it. These fields are sourced from the base entity, in this case it would be from LANANML.
Text Box	Individual field.
Grid	Data is displayed in a Grid. Drill out on Summary Form Part Column to see the columns contained within the grid.
Date	Individual field (date format).
Date/Time	Individual field (date/time format).
Time	Individual field (time format).
Tree	Data is presented in a tree type structure.
Boolean	Individual field (boolean).
Integer	Individual field (integer type).
Numeric	Individual field (numeric type).
Chart	Chart (Home Summary Form) and In-Context Chart (Module Summary Forms).
Text Area	Individual field. Used where an unknown amount of text may have been entered, such as in a comment field.

The Label Text column allows you to change the field label e.g. change Date Created to Record Created. Grid Row limit allows you to define the number of records displayed within a grid on the Summary Form. For example: In the Property Summary Form you may wish to limit the number of Owners that are displayed.

e. Summary Form Card Parts

This option allows you define what fields are available within a Card part type. It is only available where a row has been selected that is a Card Part Type. New fields may be added to the card part or remove existing fields. When Adding, you will be provided with a list of fields that are valid for the Card part. The order of the fields can be changed by checking a single field and using the Up / Down buttons to move it as shown in Image 79.

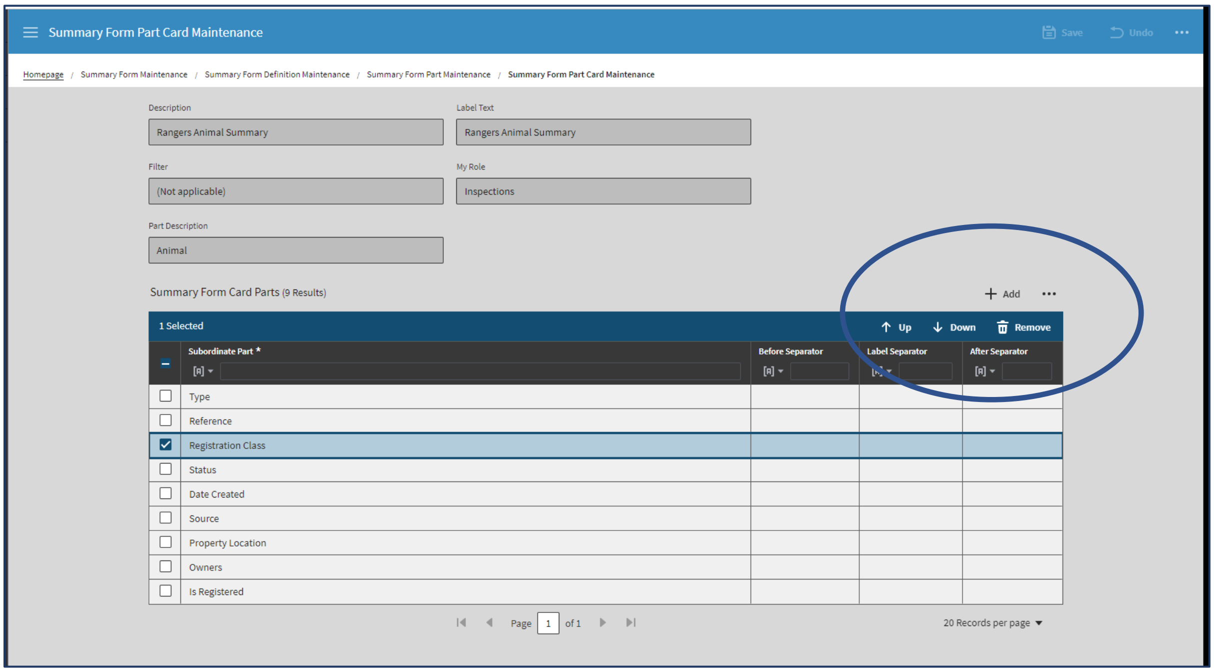


Image 79

The Before, Label and After Separator columns allow for html tags to be rendered, either before the part, within the part between label and value, or after the part.

e.g.
 [-]

If entered in the Label Separator column the [-] places a hyphen between the field label and the value.

f. Summary Form Part Column Maintenance

This option is only available for Grid Part Types. Image 80 shows the Customer Requests grid on the Animal Summary Form. The Labels have been overridden with more meaningful text.

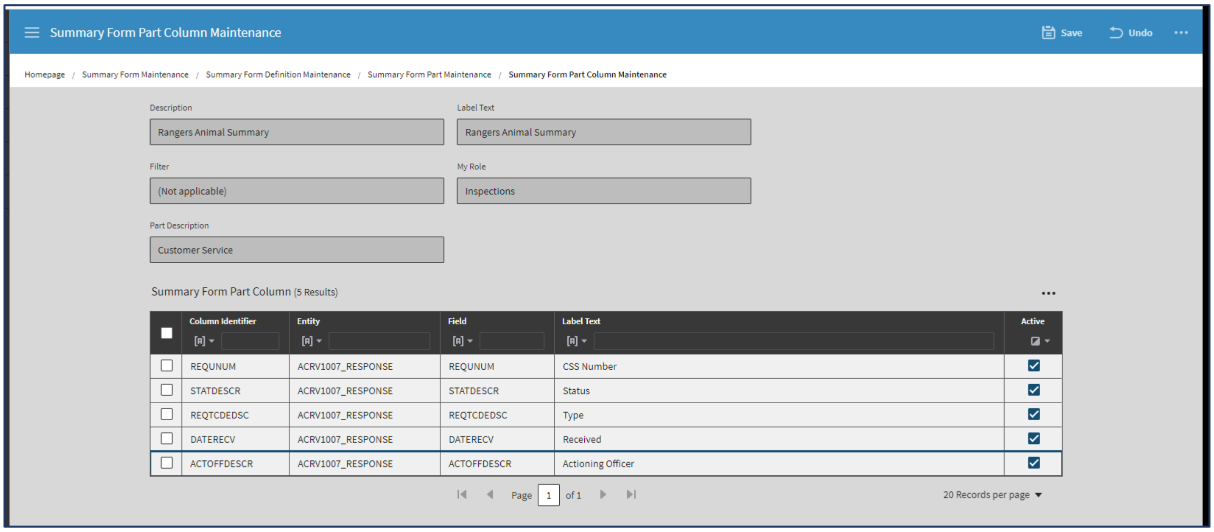


Image 80

Result:

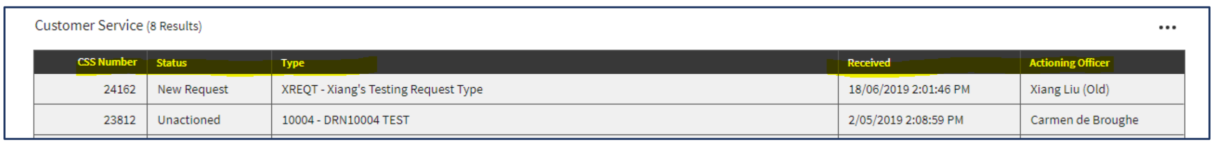


Image 81

g. Summary Form Layout Maintenance

This option, shown in Image 82, deals with the visibility and availability to individual User Accounts.

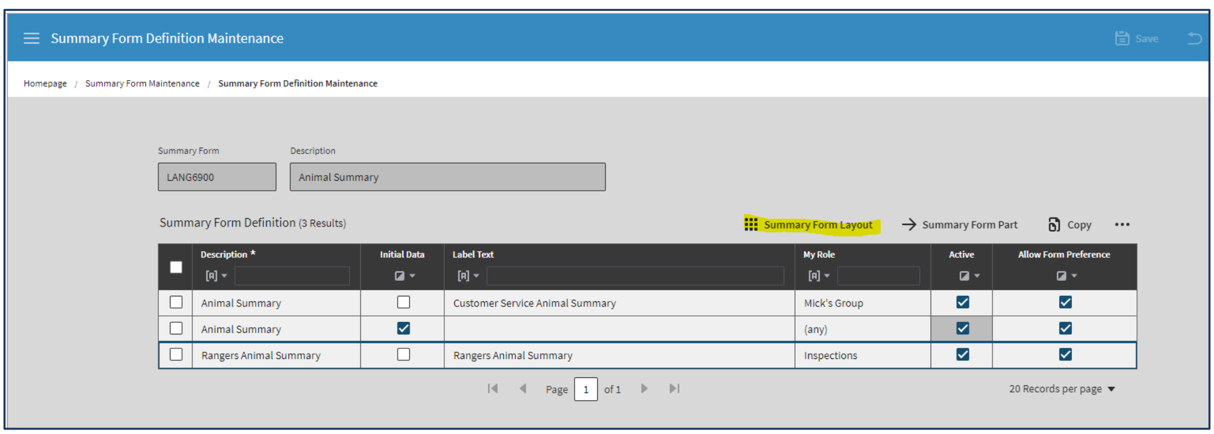


Image 82

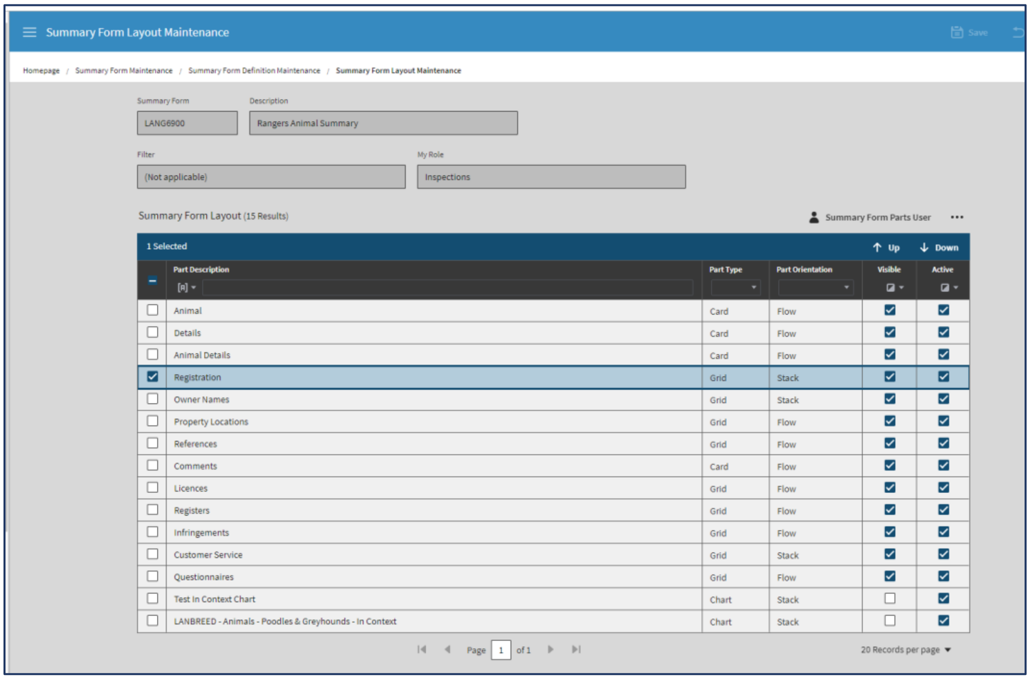


Image 83

The form shown in Image 83, determines the order in which each Part is displayed along with its visibility to the users. By checking on a Row the Up/Down buttons become available and the Part can be moved up or down the form.

h. Part Visibility

The Form Part, Layout Part Visible and Active check boxes determine whether a Part is available on a Summary Form Preference. If a Part is not available on a Summary Form Preference, then it will not be visible on the Summary Form. If a Part is available on Summary Form Preference, then set the Visible to User check box on the Summary Form Preference to indicate whether the Part is to be shown on the Summary Form.

For a Part with either the Form Part Active checked off OR the Layout Part Active checked off. The Part is not available on any users Summary Form Preference and therefore not shown on any users Summary Form irrespective of any other settings.

For a Part with both the Form Part Visible checked on AND the Layout Part Visible checked on. The Part is available on all users Summary Form Preference, apart from the individual users where the administrators have specifically removed visibility. Refer to Summary Form Parts User section of this document on how administrators can override the visibility of the part for individual users.

For a Part with either the Form Part Visible checked off OR the Layout Part Visible checked off. The Part is not available on all users Summary Form Preference, apart from the individual users where the administrators have specifically granted visibility. Please refer to Summary Form Parts User section of this document on how administrators can override the visibility of the part for individual users.

NOTE: There are other factors outside of the Summary Form layout that affect the visibility of parts of the Summary Form. For example, COR Responsibility or System and Module parameters.

Customers should note that where a Summary Form Part is empty i.e. contains no data it will be hidden. This is to avoid large empty spaces on the Summary Form.

The following forms are affected:

Summary Form	Part ID	Description
Application	LAPDECN	Application Decision
	LAPDIMS	Application Dimension
	LAPMAJC	Application Development Category
	LAPMDTA	Application Miscellaneous Data
	LAPV6909_CLOCKS	Application Clock
	LAPV6909_CONSENTS	Application Consent
	LAPV6909_DATES	Application Date
	LAPV6909_FEES	Application Fee
	LAPV6909_INSPECTIONS	Application Inspection
	LAPV6909_LOCATIONS	Application Location
	LAPV6909_NAMES	Application Name
	LAPV6909_OFFICERS	Application Responsible Office
	LAPV6909_REFERENCES	Application Reference
Debtors	LDRV3000_FINANCIALSUMMARY	Financial Summary
	LDRV3000_INDICATOR	Indicators
	LDRV3000_LDRABAL	Aged Balances
Infringements	LIFACTI	Infringement History
Licensing	LAPDECN	Licence Decision
	LAPDIMS	Licence Dimension
	LAPMAJC	Licence Development Category
	LAPMDTA	Licence Miscellaneous Data
	LAPV6909_CONSENTS	Licence Consent
	LAPV6909_DATES	Licence Date
	LAPV6909_FEES	Licence Fee
	LAPV6909_INSPECTIONS	Licence Inspection
	LAPV6909_LOCATIONS	Licence Location
	LAPV6909_NAMES	Licence Name
	LAPV6909_OFFICERS	Licence Responsible Officer
	LAPV6909_REFERENCES	Licence Reference
Property	LPAV0010_DEBT	Property Debt
	LPAV0010_GROUP	Property Group
	LPAV0010_INDICATOR	Property Indicator
	LPAV0010_LANDUSE	Property Land Use
	LPAV0010_PARCEL	Property Parcel
	LPAV0010_PROPERTY	Property Address Grid
	LPAV0010_REFERENCE	Property Reference
	LPAV0010_TITLE	Property Title
	LPAV0010_ZONE	Property Zone
	LPAV0012_ASSOCIATED	Property Associated
	LPAV0012_NAME	Property Names
	LPAV0012_PROPERTY	Property Address
	LPAV0012_RATETYPE	Property Rate Type
Rates	LRAV1000_FINANCIALSUMMARY	Financial Summary
	LRAV1000_INDICATOR	Indicators
	LRAV1000_INSTALMENT	Instalments

i. Summary Form Parts User

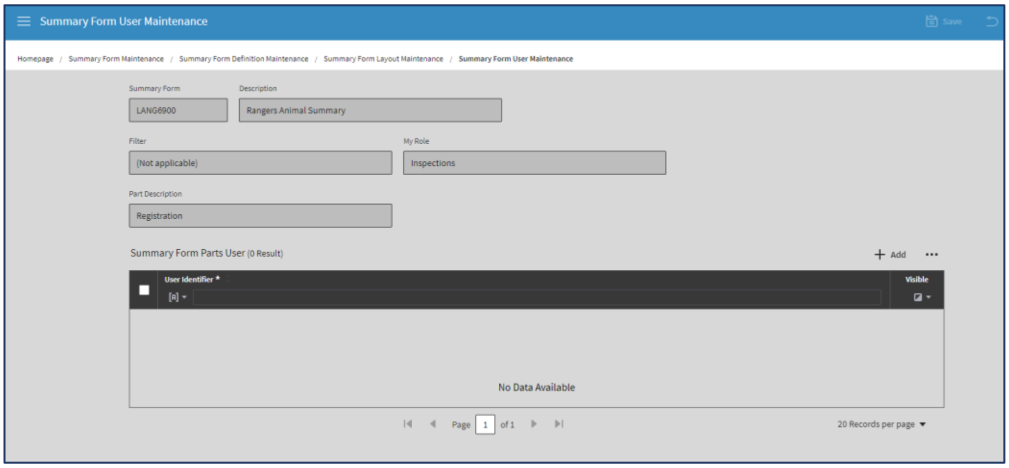


Image 84

This form will allow administrators to override the visibility of the part for individual users.

In our example for the Rangers Summary Form, check off Visible, Image 85, to make the Infringements Part unavailable on the Summary Form Preference for all users and therefore not shown on any Summary Form.

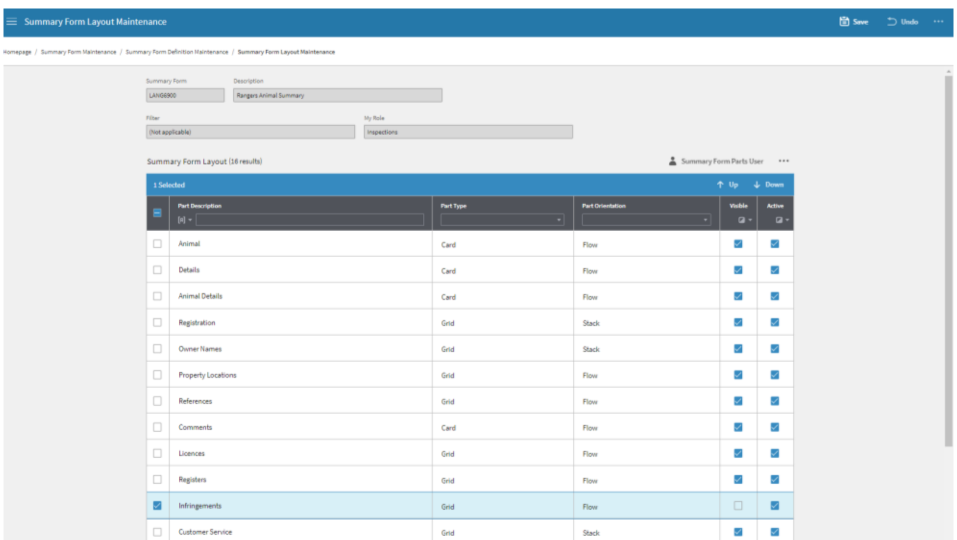


Image 85

However, on the Parts User Maintenance form, the insertion of the Supervisor user identifier with Visible checked on will make the Infringements part available on the Summary Form Preference for this staff member only.

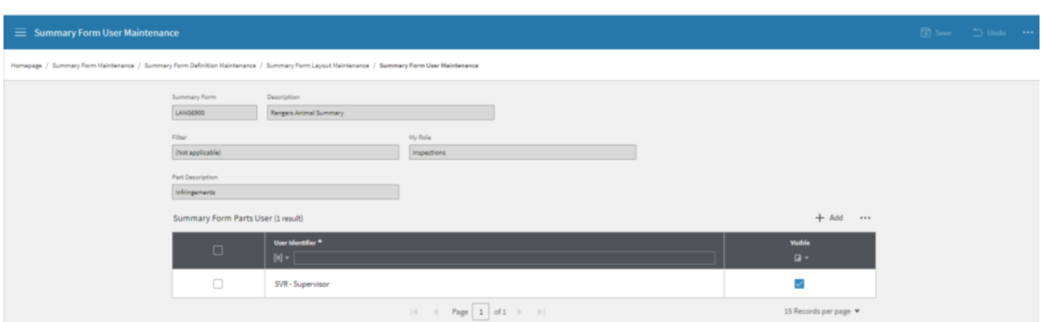


Image 86

j. Summary Form Charts

New Summary Form Charts are created in the same way as previously via System Administration >> System Parameters >> MyPathway Charts.

In-Context Charts are defined by Council and only available on the module Summary Forms. Once saved they automatically create a Chart Part on all instances of a module Summary Form.

Home Summary Form Charts are defined by Council and only available for the Home Summary form. Once saved they automatically create a Chart Part on all instances of a Home Summary Form.

On initial load of Pathway UX Summary Forms (see First time set-up) all existing:

- Smart Client module Summary Form In-Context Charts are created on the default UX module Summary form.
- Smart Client Home Page Charts are created on the default UX Home Summary form.

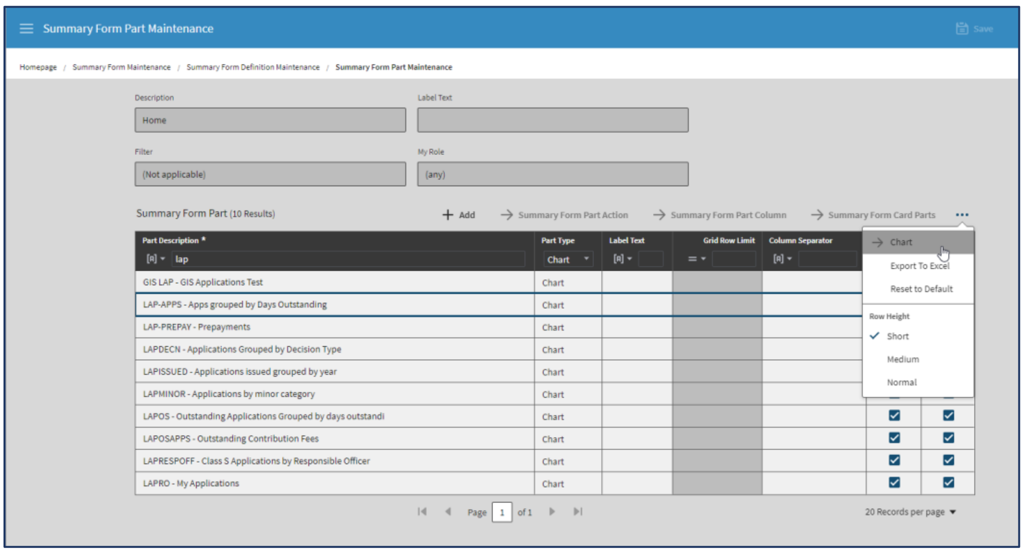


Image 87

k. Chart Visibility

The visibility of a Chart is controlled in a similar manner to a Part.

The Form Part and Layout Part Visible and Active check boxes determine whether a Chart is available on the Summary Form Preference. If a Chart is not available on the Summary Form Preference, then it will not be visible on the Summary Form. If a Chart is available on the Summary Form Preference, then set the Visible to User check box on in the Summary Form Preference to indicate whether the Chart is to be shown on the Summary Form.

For a Chart with either the Form Part Active checked off OR the Layout Part Active checked off. The Chart is not available on any users Summary Form Preference and therefore not shown on any users Summary Form irrespective of any other settings.

For a Chart with both the Form Part Visible checked on AND the Layout Part Visible checked on. The Chart is available on all users Summary Form Preference, apart from the individual users where the administrators have specifically removed visibility. Refer to Summary Form Parts User section of this document on how administrators can override the visibility of the part for individual users.

For a Chart with either the Form Part Visible checked off OR the Layout Part Visible checked off. The Chart is not available on all users Summary Form Preference, apart from the individual users where the administrators have specifically granted visibility. Please refer to Summary Form Parts User section of this document on how administrators can override the visibility of the part for individual users.

l. Assigning Home Summary Form Charts to Users

The Home Summary Form Charts are available at the Home Summary Form My Role level to all Users that have access to the Home Summary Form. The Default Home Summary Form is available to all users, its My Role setting is (any).

Sites can create separate Home Summary Forms based on Roles (Groups). This simplifies assigning Charts as a chart can be set as Visible to a Role specific Home Summary Form e.g. Rates and not Visible to all other Home Summary Forms.

For a Chart with both the Form Part Visible checked on and the Layout Part Visible checked on. The Chart is available on all users Summary Form Preference, apart from the individual users where the administrators have specifically removed visibility.

Where more fine level assignment of a Chart is required, for example a Rates Manager Chart, then check off Visible on the Form Part resulting in the Chart not being available on the Summary Form Preference for all users. Then use the Summary Form Parts User option to make the Chart visible to individual users.

Example 1: New Home Summary Form chart for the Rates Group:

- Create your query and Chart with In Context checked off and Save.
  Behind the scenes a Chart Part has been created and allocated to all Home Summary forms and would be available to all Users for selection via Summary Form Preference.
- Go to System Administration >> System Parameters >> Summary Form Maintenance
- Select the default Home Summary form and go to Summary Form Part.
- Locate the new Chart and check off Visible.
  Repeat for each Home Summary form that should NOT have access to the Chart.

Example 2: New Home Summary Form chart for the Rates Supervisor (within the Rates Group):

- Create your query and Chart with In Context checked off and Save.
  Behind the scenes a Chart Part has been created and allocated to all Home Summary forms and would be available to all Users for selection via Summary Form Preference.
- Go to System Administration >> System Parameters >> Summary Form Maintenance
- Select the default Home Summary form and go to Summary Form Part.
- Locate the new Chart and check off Visible.
  Repeat for each Home Summary form that should NOT have access to the Chart.
- Select the Rates Home Summary Page and go to Summary Form Part.
- Locate the new Chart and check off the Visible. This will make the Chart unavailable to the Rates Users for selection via Summary Form Preference.
- On the Rates Home Summary Page go to Summary Form Layout.
- Locate the Chart and select the Summary Form Parts User Button. Add the Rates Supervisor user and set the Visible flag checked on resulting in the Chart only be available on the Rates Supervisor Users' Summary Form Preference.

m. Summarising main points regarding Charts:

- The Default Summary Forms are created using a conversion process from existing Pathway settings and brought into UX.
- Current End Users will have any Dashboard Charts that they currently use displayed on their new UX Home Page.
- Customers can use the Default Set of Summary Forms; it is not necessary to create copies. A copy is only required where a User Group (Role) requires a totally different Summary Form.
- When a New User Account is created it is allocated all the Dashboard Charts however none of them will be visible. The user needs to select the Dashboard Charts they need and set them as Visible using Form Preference on their Home Page Summary Form (self-service).
  When you create a new Dashboard Chart in UX it is automatically added to the Home Page Summary Form. End users then select the dashboard and make it visible to them.

Dashboard Charts can be deleted via System Administration >> System Parameters >> MyPathway Charts. Alternatively, they can be marked as Inactive on the Home Page Summary form via System Administration >> System Parameters >> Summary Form Maintenance.

n. Clearing the Pathway UX Summary Forms

Follow these instructions to rebuild the Pathway Summary Forms and effectively reconvert the current configuration from the existing Pathway configuration into UX.

WARNING: this process will remove ALL previously defined UX Summary Form (Dashboard) settings and construct new UX Summary Form (Dashboard) settings based on the current Smart Client and Thick Client Summary Form (Dashboard) settings.

- Clear the UX Summary Form tables by executing the following SQL statements over the relevant Pathway Database:

```
truncate table csysmtp
truncate table csysmfm
truncate table csysmfp
truncate table csysmfu
truncate table csysmgp
truncate table csysmpt
truncate table csysmpa
truncate table csysmpc
truncate table csysmpp
truncate table ocsysmtp
truncate table ocsysmfm
truncate table ocsysmpt
truncate table ocsysmpa
truncate table ocsysmpc


update csynext set lastnum=1 where entity = 'csysmtp'
update csynext set lastnum=1 where entity = 'csysmfm'
update csynext set lastnum=1 where entity = 'csysmgp'
update csynext set lastnum=1 where entity = 'csysmpt'
update csynext set lastnum=1 where entity = 'csysmpc'
update csynext set lastnum=1 where entity = 'csysmpa'
update csynext set lastnum=1 where entity = 'csysmpp'
update csynext set lastnum=1 where entity = 'csysmfp'
update csynext set lastnum=1 where entity = 'csysmfu'
```

- Create the UX Summary Form Table Content by opening a UX Client.
- Select Summary Form Maintenance, Image 88.

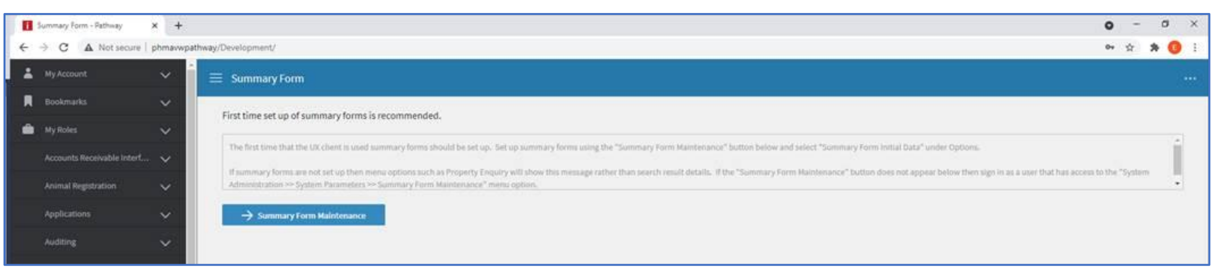


Image 88

- Select Options – Summary Form Initial Data, Image 89.

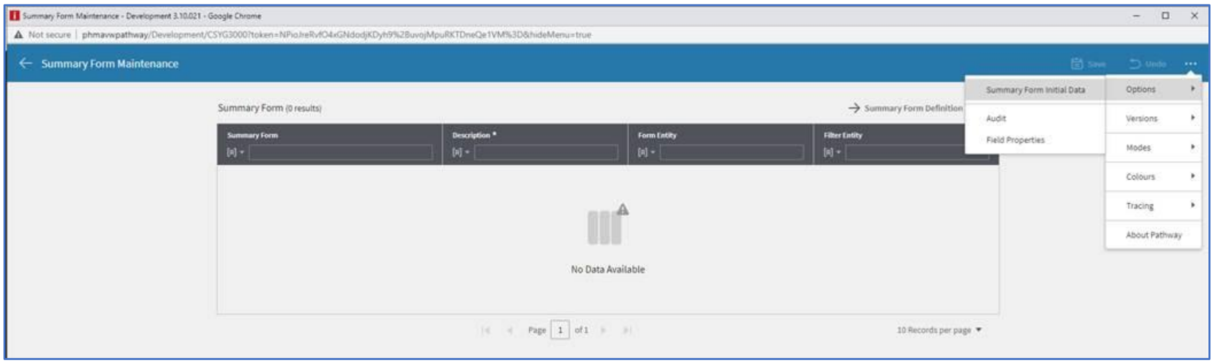


Image 89

- You should see the message shown in Image 90 once the process is completed.

Image 90

- Access Summary Form Maintenance to view what has been built, Image 91.

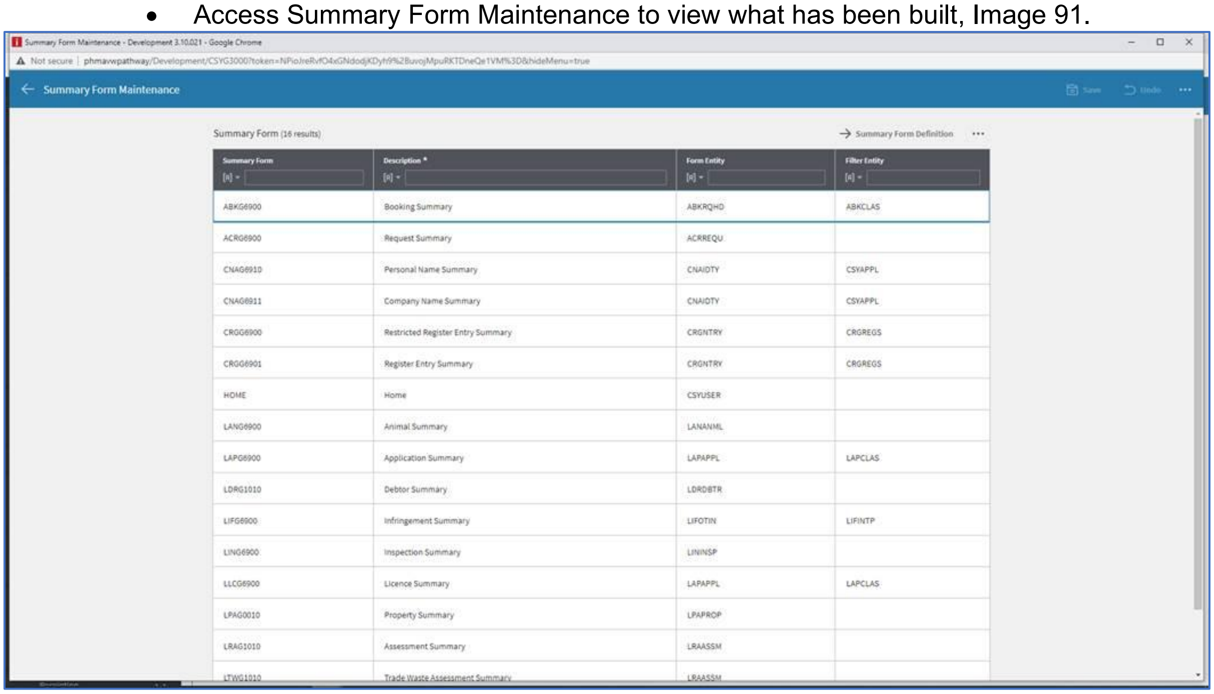


Image 91

9. Paperclip Attachments

Terminology and some slight modifications have been made around Attachment Types.

The file modes for an Attachment Type are Client and Server, Image 92. These modes replace the old Validation and No Validation settings.

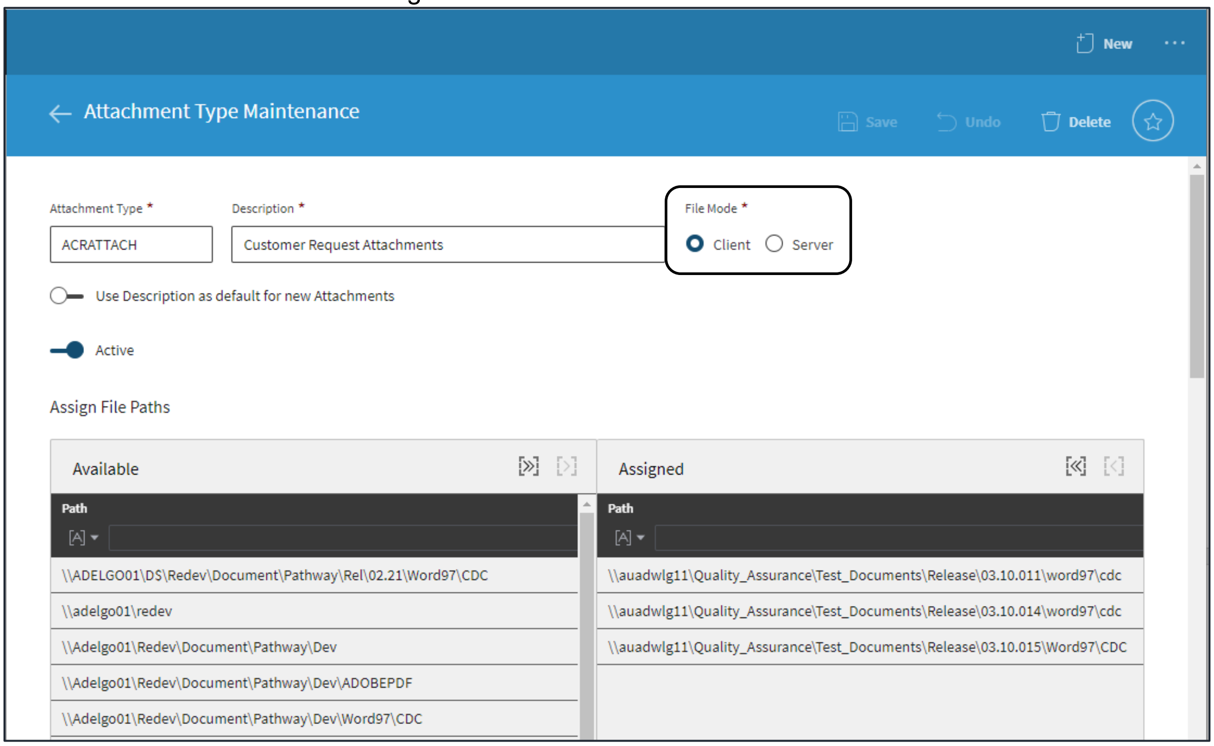


Image 92

A minimum of one Path must be assigned to each Attachment Type to be used in UX, as shown in Image 92.

a. Client Mode

When Client Mode is used, the user can search and select a file from any location they have access to, Image 93. Once selected and saved, a copy of the file is saved in the default location specified for the Attachment Type. For Client Mode a copy of the attachment file is always uploaded.

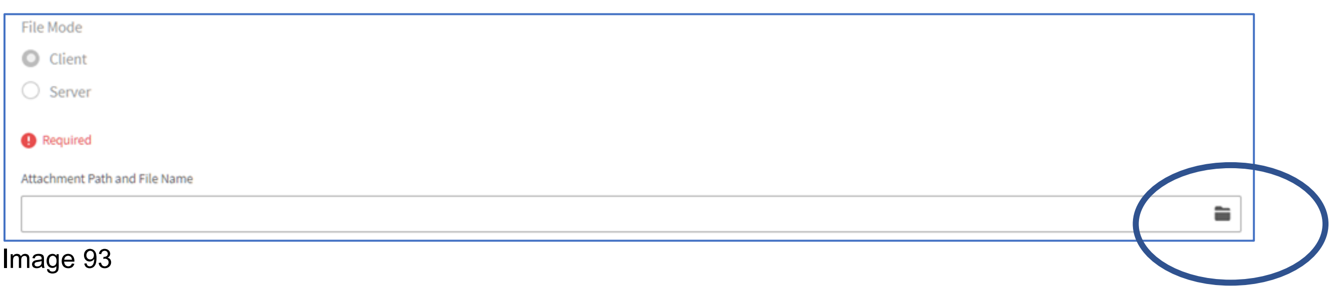


Image 93

b. Server Mode

When Server Mode is used, paths assigned to the Attachment Type are displayed with the help of autocomplete functionality. For Server Mode, the file path restriction is always on.

Click into the Attachment Path and File Name and backslash symbols (\\) automatically appear, Image 94. The autocomplete pop-up is triggered and initially all paths assigned to the Attachment Type are displayed. When a path is selected, the auto-complete pop-up changes to display valid directories below the one selected. Continue to select or specify information in the field to see the autocomplete pop-up change until you select a file.

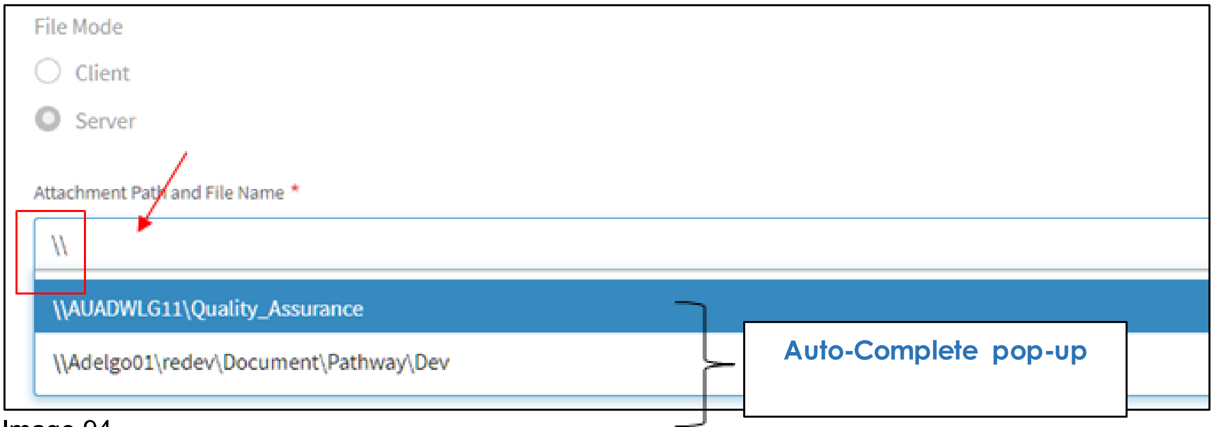


Image 94

c. Drag and Drop

Drag and drop is available in the following maintenance menu options:

- Animal Registration >> Animal Maintenance
- Applications >> Application Maintenance
- Bookings Management >> Booking Maintenance
- Customer Service >> Request Maintenance
- Debtors >> Debtor Maintenance
- Infringements >> Infringement Maintenance
- Inspections >> Inspections Maintenance
- Licensing >> Licensing Maintenance
- Name and Address Register >> Name and Address Maintenance
- Property Administration >> Property Maintenance
- Rates Accounting >> Assessment Maintenance
- Registers >> Register Entry Maintenance
- Trade Waste >> Assessment Maintenance
- Water Billing >> Assessment Maintenance

The default Attachment Type is set for the module and will be automatically selected but can be changed as required. The description will default if set to do so on the default Attachment Type but can also be overridden if required. Simply drag and drop one or more files onto the target area and they will be uploaded with the default description.

For any devices where drag and drop is difficult or not available the Select Files hyperlink allows the user to choose files available to the device to upload instead.

d. EDMS

EDMS integration is only triggered by Attachment Types with Server Mode.

10. Other information

a. Menu Security

In Thick and Smart Client Pathway the menu was the first level of security. If a function was not on the menu, then it could not be accessed. This is still true for UX Pathway.

UX differs from Smart Client and Thick Client. In Smart Client, if a function is on the menu such as Debtor Enquiry and the user does not have any COR (Responsibilities) permissions to the function, then the user could not access Debtor details. They can display records in the Selection Form but cannot go any further. This only applies to modules where COR is in use. For Thick Client, users cannot not get any further than the Search Profile. In UX if the User Account has Debtor Enquiry but does not have any specific COR access, then that user can see the contents of the Summary Form. They cannot go any further than the Summary Form as they do not have any maintenance COR Options available to them.

NOTE: It is recommended that UX User Accounts have one Role that enables them to perform all their duties.

b. Browsers

Major browsers are supported for Pathway UX e.g Chrome and Edge. The browser must be the current, or one previous, version. Pathway UX does not support Internet Explorer.

As Pathway UX runs in a browser there is the ability for a user to close browser at any time. This does NOT log off the user. If a change has been made on a Pathway page, then attempting to close the browser will provide a Leave Site message to the user, at which point they can opt to close the browser or continue in Pathway.

Workflow is an exception to this behaviour. If in a Workflow process, attempting to close the browser will generate a Leave Site message, regardless of whether changes have been made on the page.

c. Logging Off

The following information is to provide customers with information regarding the importance of users logging off the Pathway UX Client.

Signing out at the end of a Pathway UX client session also signs out the session on the Pathway application server and out of Word integration. The Pathway application server session is either signed out in this way by the user, or automatically because of timeout values for inactive sessions, which is configured in System Administration >> System Parameters >> Session Timeout Maintenance.

NOTE: It is recommended that timeout values are entered.

If a site has not configured timeout settings it becomes more important for users to sign out so that their inactive sessions are signed out from the Pathway application server. The Pathway UX client uses a persistent cookie for authentication and this is still present when the browser or application (for example, Microsoft Word) is closed and reopened. This cookie has information about the session on the Pathway application server and continues to work if the session remains signed in on the Pathway application server.

NOTE: It is important that timeout values are set to a level where your site is happy with the security risk.

d. Time-Out

This existing function is under System Administration >> System Parameters >> Session Timeout Maintenance. The timeout allows a time-period to be setup against each Pathway product, Image 95.

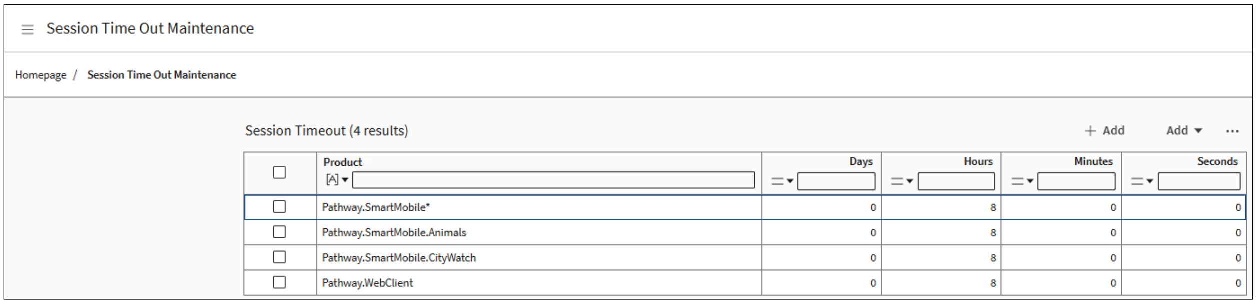


Image 95

Image 96 shows the message that is displayed when a single form times out.

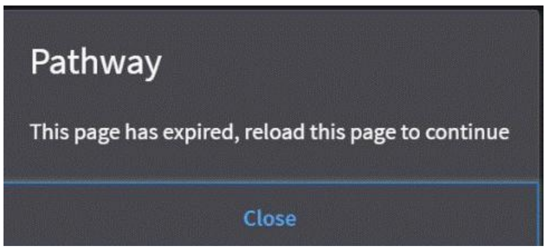


Image 96

e. Printers

Access printers under Batch Processing > Printer Maintenance. The only defined printers provided for Pathway UX are client and email printers, Image 97.

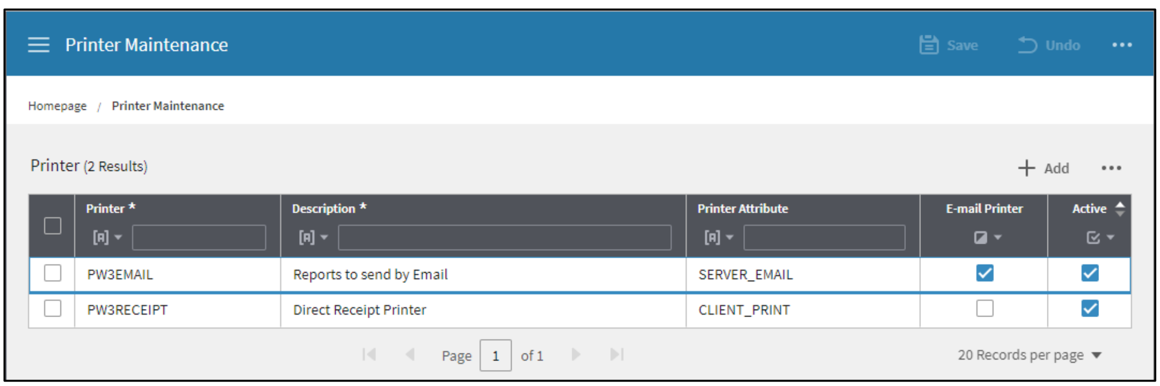


Image 97

Client Direct is the configuration for the existing receipt printer hardware.

The Email printer does not perform actual printing, but this printer is required for batch jobs that send email reports.

Previous values are not deleted and can still be viewed through Thick and Smart Clients. Client Direct printers only work on Windows Desktop devices and require the Pathway Agent to be installed. There are no Server or Local printers in UX.

f. Word Processing Setup

Previously when creating a Merge Type the Normal.dot on each client computer was used as the basis for the document e.g. font, margins etc C:\users\<user>\AppData\Roaming\Microsoft\Templates.

In UX Merge Types are based on a document located in the Pathway installation under the tpl directory called Default.doc. Set the Default.doc up to match your corporate styling, ensuring formatting is correct on new Pathway documents.

This document is used as the basis for:

- New Merge Type templates
- Standard Condition documents
- Standard Memo documents, where based on Word
- Land Use and Zone standard documents.

g. Word Processing Printing

Printing documents via UX will allow the selection of any installed printer device such as a Network Printer, OneNote and other printers. If you are using a VM installation then Printers will need to be installed on the VM and one printer nominated at the Default. The Agent must be installed. The Agent controls the document printing.

h. Printing Reports

Printing output from batch jobs is directed to a browser page and is available on all devices. The browser can then print to any physical printer it is capable of printing to.

When the printing job produces multiple reports in UX, the Print Multiple Reports browser form will display a list of tabs above the report content section, one tab per report in addition to an “All Reports” tab that will merge all the reports into a single file.

This functionality allows UX users to print or download any of the generated reports by simply clicking on the report’s tab and then click the Print or Download button. The name of the downloaded file for the “All Reports” tab is “Multiple Reports.txt” and will be the same as the report name for a single report download, e.g. “Unprocessed Drawers Report.txt”.

The font used by reports displayed in the browser has been set to the Google font Source Code Pro.

i. Batch Queues

There is no change to Batch Queue functionality.

j. Field Properties

Field Properties, Image 98, provide information on the field currently selected. Position your cursor on a field and go to the More Button in the Title Bar, then select Field Properties. Field Properties are not provided for Selection and Control Forms.

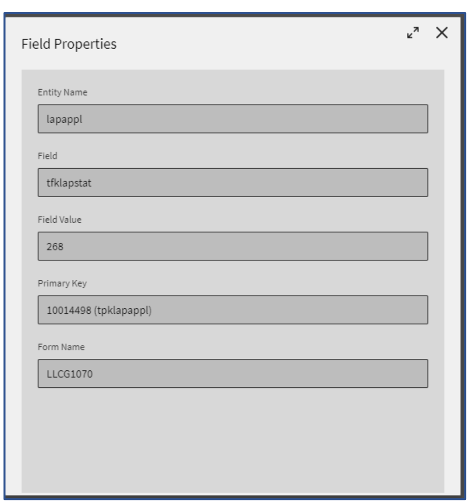


Image 98

k. Tracing and Log Files

To create a trace file, go to the form at the start of the process you want to trace. Click on the More

Button in the Title Bar, Image 99.

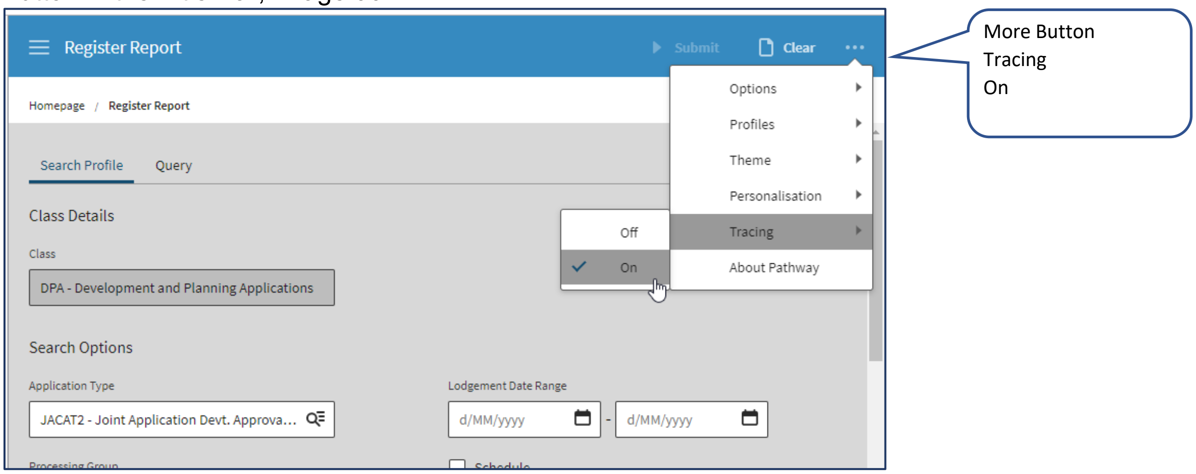


Image 99

- Turn Tracing On.
- Perform the process that you wish to capture.
- Turn Tracing Off.
- Support under My Account will automatically open. You can either download the log file to your PC (Internet Downloads Directory) or E-mail the log file directly.

l. Support

Support is under My Account > Support.

Support provides information about your Pathway UX installation and other administrator functions:

- E-mail Logs – Collects the system log file and emails to a nominated address.
- Download Logs – Collects the system log file and downloads it through your browser to your PC (Internet Downloads Directory). The Download Logs button will display an error message if it fails to complete the process.
- Clear Caches – Clears the server caches. Required if parameters have been changed in the Thick or Smart Clients and is run at any time.
- Debug – Downloads the Uniface Debugger. Usually done under direction of Pathway Support or Development Staff.
- Test Pathway Agent – Click the button to check the currently loaded Pathway Agent on the PC.

m. User Settings

The System Administrator can restrict User Settings, Image 100. To enable or restrict User Settings:

1. Log on with your System Administrator user.
2. Select My Account > User Settings to view and restrict each of the settings.
3. Select More > Options > Default Settings to set the user override value.

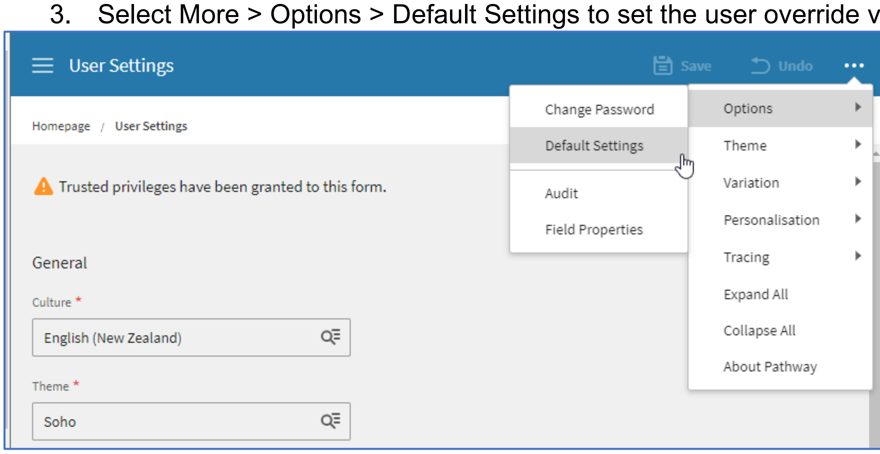


Image 100

11. Pathway Agent

The Pathway Agent is a (Windows) desktop application which ensures backwards compatibility between Pathway UX (an html application running in the user's browser) and client-side integration on Windows operating system devices.

No Agent is required, or available, for Pathway UX sessions running on non-Windows devices.

a. Summary of Functions

The following list outlines the functions supported by the Pathway Agent.

Word Processing
Microsoft Word integration including Merge Type and Extract Type Maintenance.

GIS/Map Integration
The majority of these GIS products only function on Windows devices because the integrated GIS software itself functions only on Windows devices:

- ADMAPG - Autodesk Mapguide
- ARCENG - ArcGIS Desktop
- ARCPRO - ArcGIS Pro (coming soon in 3.10.024)
- COMGIS - Generic COM GIS Interface (used by many different GIS suppliers)
- DDEDEF - Dynamic Data Exchange Default Implementation GIS Product (very old technology still used by some GIS suppliers)
- INFO - Infomaster
- INTRAM - IntraMaps
- MAPINF - MapInfo
- UXWS - Web Service and URL Interface (UX Client only)
- WEBMAP - GeoMedia Web Map Publisher.

Document Management / EDRMS
Pathway UX and EDMS Integration is only supported by GENCON (GENeric CONnector).The client-side functions documented in the GENCON software development kit (SDK) technical reference guide are provided by the Agent.

Client-side functions in GENCON include the optional alternate list viewer, alternate name viewer and alternate document viewer capabilities implemented in the GENCON drivers supplied by some EDMS vendors.

Delivery Point Identifier (DPID)
DPID address validation integration

It is worth noting that the client-side integration mode allows DPID software installed on premise to function when Pathway UX is deployed in the cloud.

Printing
The Agent is required in relation to printing is the networked printers are managed by the Windows operating system and therefore under certain circumstances when Pathway needs to know the destination printer (as opposed to the browser which can find out for itself) then the Agent is what is used to "talk to" the operating system to find out what's available.

3rd Party Integration / COM API
Starts and communicates with Pathway sessions. There are 65 separate functions provided by the Pathway UX COM API that are documented in the COM API's software development kit (SDK) technical reference guide.

Pathway COM API functions are called by many third-party software suppliers' integrations (E.g. Kapish's Pathway Integration add-on for TRIM, EzeScan's name and address and customer request integrations).

The COM API also provides the implementation for processing of ".pth" email attachments sent in notification emails from various Pathway functions (e.g. workflow tasks).

b. Agent Install

The Pathway Agent is installed through an MSI as part of the software installation, and you should be able to use any of the standard MSI switches for a clickless installation.

The only properties that should be set are all users, as this will make the selection to install the COM API.

Pathway.Agent.msi {properties} {standard switches}
Pathway.Agent.msi ALLUSERS=1 INSTALLCOMAPI=1 /qb

It would then be distributed to the client computers as determined by your site. It connects over Ports 8000 to 9000 randomly.

When the Pathway Agent is installed a hook is registered to allow the web browser to start it. When a user opens Pathway UX it will attempt to connect to the Pathway Agent if there was a recent connection that is cached. If the connection is unsuccessful, the Pathway Agent is started.

The Agent is displayed in the Windows System tray on the client computer, Image 101.

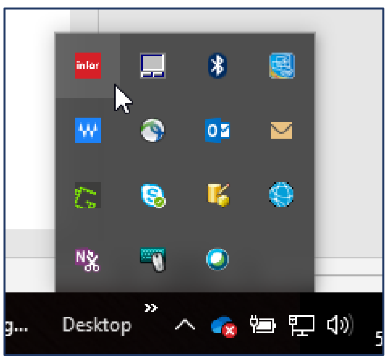


Image 101

Right-click the Agent icon to find out details about the Agent.

Only a single Agent is running at any time. One Agent handles multiple environments running at one time such as Production and Training. Where an environment uses a different version of the Agent a second Agent will be running.

You can test the installation of the Pathway Agent by selecting My Account > Support > Test Pathway Agent, Image 102.

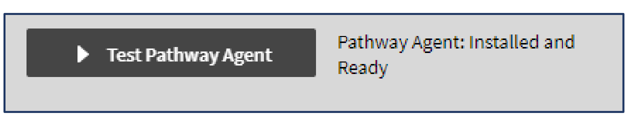


Image 102

You can view the installation of the Pathway Agent through the Control Panel, Image 103.

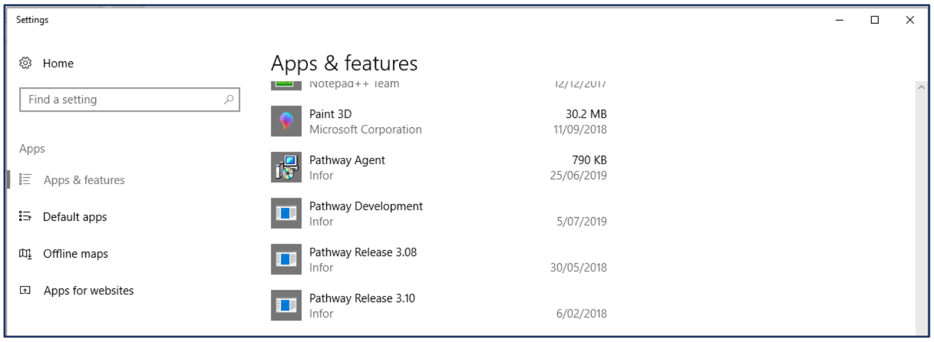


Image 103

c. Uninstall Agent

From Windows, go to Start >> Control Panel >> Programs and Features.
Select Pathway Agent.
Select Uninstall.

d. Manual installation

If the Agent has not been installed and a function is selected that requires the Agent, the message in Image 104 is displayed.

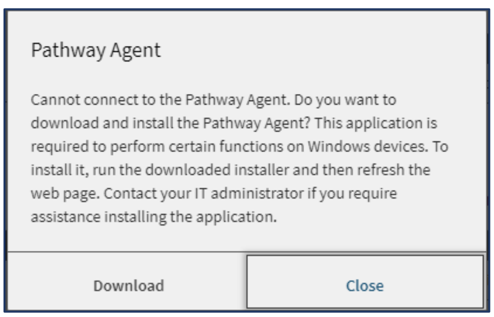


Image 104

Select Download and the msi is displayed at the bottom of the browser, Image 105.

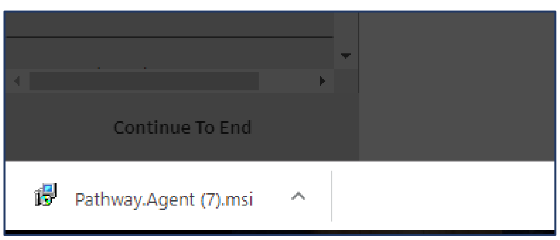


Image 105

To install the Agent manually:

Click on the msi to start the Wizard, Image 106.

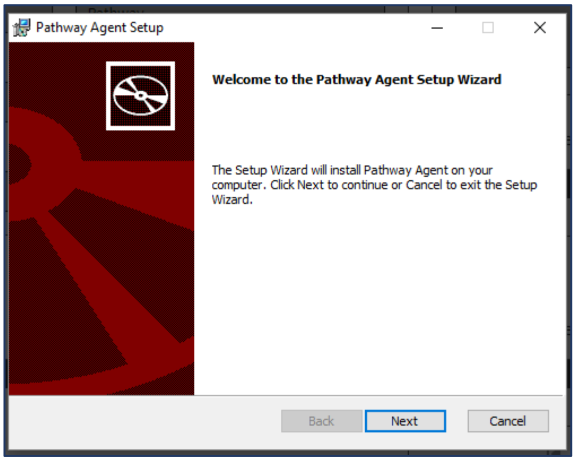


Image 106

Click Next, Image 106.

Select Install for all users of this machine as this option is the recommended configuration, Image 107.

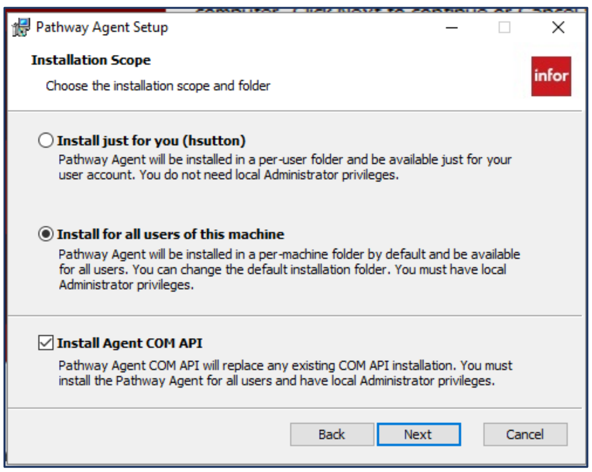


Image 107

Click Next to start the installation, Image 107.

The installation progress is shown, Image 108.

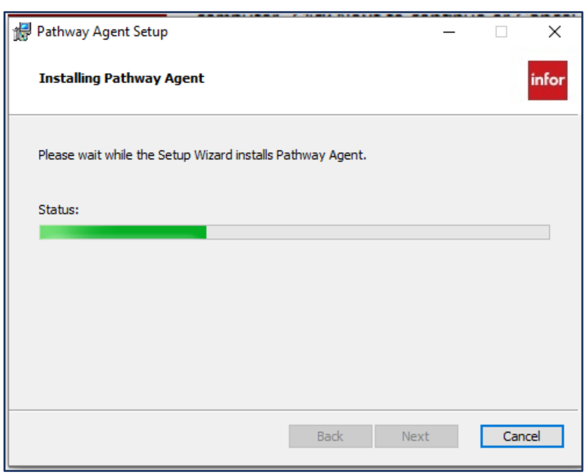


Image 108

Click Finish to complete the installation, Image 109.

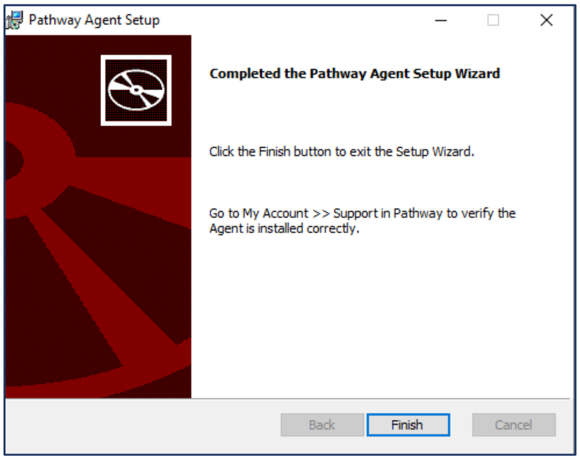


Image 109

Log off and log on again to Pathway.

If the Agent is required, a message may be displayed, depending on cached data.

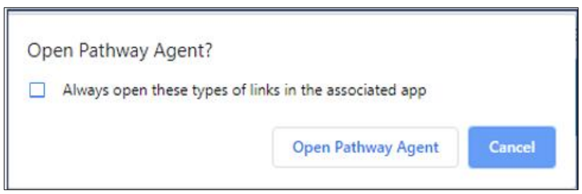


Image 110

Click Open Pathway Agent to check the message.

The Pathway Agent is not automatically run after installation. The pop-up window is a security feature of the browser and is expected behaviour.

If the Agent is not running and the web page needs the Agent, it is started on-demand and as required. It is not started unless the Pathway UX page requires it.

If you open the Support page, Pathway starts the Agent because the Agent is required. If the Agent is not already running, this prompt may be displayed. This is expected behaviour.

e. Troubleshooting

The agent runs on the local computer or on the server if using virtualization like Citrix. Agent-related logging will be stored under C:\ProgramData\Infor\Pathway.

f. Pathway Agent Version Check

If the version of the Pathway Agent installed on a client machine is lower than that available in the UX client, then a message will appear at the top of the Home page indicating that a newer version is available.

To find the Agent version, in the system tray in the tool bar of the client computer you will see the Infor icon, shown in Image 111. Right click on the icon and Image 112 will appear, which shows the Agent Version.

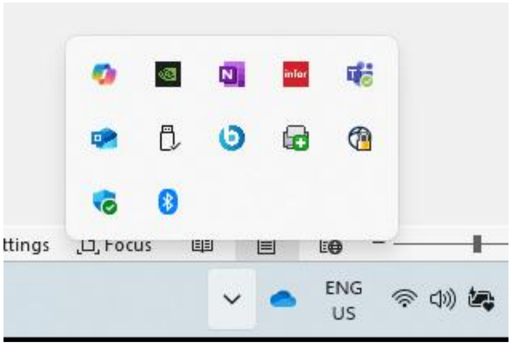


Image 111

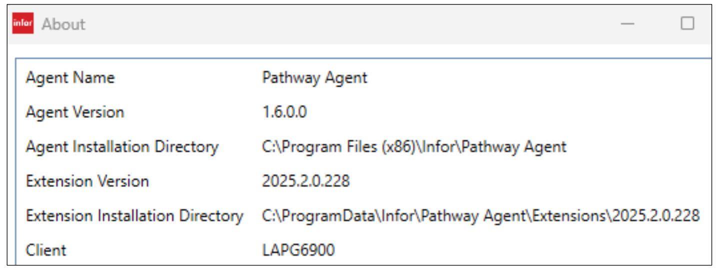


Image 112

g. Why does the message Open Pathway Agent keep appearing?

When the first Agent prompt appears, Image 113 (which is generated by the browser not Pathway), if there is an Always allow? check box, tick it ON and then click Open Pathway Agent.

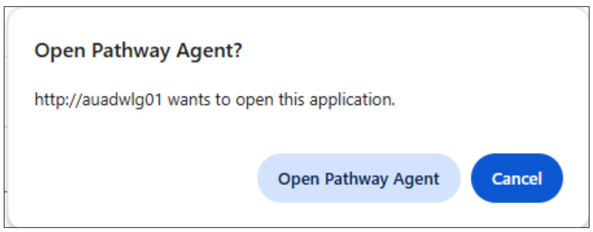


Image 113

If the Open Pathway Agent? prompt is not answered straight away, a second Pathway message Unable to establish communication message will pop-up, Image 114. Answer the Open Pathway Agent message first, then you can answer the second message.

Image 114

h. Pathway Agent Error on Starting

The main issue and probably the primary cause of problems is that the Agent is not starting up correctly, Image 115.

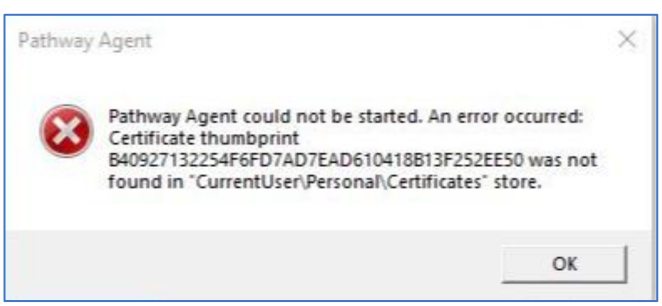


Image 115

Uninstall and reinstall the Pathway Agent to resolve this issue.

12. Change Log

Date	Section	Description of change
November 2020	User Settings	Addition of “Compact Mode”
	Bookmarks	Clarification of ‘Class’ based items.
	Types of Fields	Update to Date entry
		Update to Search/View
	Addition of new section	Showing and sorting your Dashboard Charts
	Addition of new section	In-Context Charts
	Change of section	Bulk Maintenance – complete re-write.
	Addition of new section	Menu Security
December 2020	Addition of new section	UX Client Title Page
January 2021	Change of section	Result List – addition of Select All button
February 2021	Addition of new section	Function Keys in UX
	Addition of new section	Truncated text in grid
	Addition of new section	Printing Reports
March 2021	Update to Analyse Results	Drill through to records.
	Addition of new section	Printing multiple reports
	Addition of new section	Select All button
May 2021	Name changes to “Personalise your Workspace”	Variation >> Mode Personalisation >> Colours
June 2021	Time-out settings	Addition of Time-out settings section.
	Clearing Summary Forms	Addition of new section – Clearing the Pathway UX Summary Forms
June 2021	Addition of new section	Addition of new section – Open Word? Dialog
August 2021	Change to Pathway Agent section	Small change to the msi paragraph regarding installation.
August 2021	Change to menu security	Removal of a section requiring Leaf options to be set under an internal node. Leaf options can now be placed at the top of the menu.
September 2021	Addition of new section	Help Menu
October 2021	Change Summary Form Preference, Home Summary Form Chart Parts, Module Summary Forms In-Context Chart and Summary Form sections	Summary Form Part visibility clarification.
October 2021	Addition of new section	Section to describe requirements for Document printing.
October 2021	Addition of new section to Pathway Agent.	Section describes the checking of Agent Versions.
December 2021	Addition of new section to Pathway Agent. Agent Q & A	Section describes more detail of the installation of the Agent.
June 2022	Pathway Agent Q & A	Update to the COM API Path in second image to C:\ProgramData\Infor\PathwayAgent\Pathway COM
September 2022	Paperclip Attachments	Addition of Drag and Drop feature
	Profiles	Update to Working with Profiles section.
November 2022	Signing In/Out	Addition of new section

Date	Section	Description of change
February 2023	Pathway Agent	Split out into its own Section. Added Introduction, Summary of Functions and Architecture.
February 2023	Working with menus	Update to “open in another window”
February 2023	Logging Off the UX Client	Addition of new section
February 2023	Pathway Agent	Update
February 2023	Types of Fields	Clarification
March 2023	Other >> Browsers	Explanation of ‘close browser’
May 2023	New Sub-Section	Q & A for Signout
August 2023	New Sub-Section	Auditing
August 2023	Pathway Agent	Manual Installation – change to image
September 2023	Clear Cache	Clarification of the Clear Cache function
September 2023	New Sub-Section	Web Forms and Static Files
September 2023	Update Analyse Results	Additional functionality added to the Analyse Results section.
October 2023	New Sub-Section	Stand-alone forms with Options
January 2024	New Sub Section	Menu Searching
August 2024	Download Logs	Updated with change for 2024.08 regarding error message
September 2024	Working with Profiles	Added System Administrator information for creation of public profiles.
	Summary Forms	Clarification of Summary Forms
	New Section “Summarising main points regarding Charts”	
April 2025	All	Review of entire document.