



# Cloud Portal for Pathway

## User Guide

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## Purpose of this document

This guide explains how Pathway integrates with Infor Cloud Portal and how it may be used to share information and streamline processes. It is intended to help both technical and non-technical users understand how to access Pathway within the Infor Cloud Portal, how to use available Pathway widgets, and what steps are needed to keep it operating smoothly. By following these instructions, you will learn how to log in, use the available features, and resolve common issues.

The document is ultimately intended to help you get started and make the most out of Infor Cloud Portal for Pathway.

## Overview

Pathway integration with Infor Cloud Portal allows organizations to connect with Pathway directly via the Cloud Portal environment - making it easier to share information, automate tasks, and deliver services through a single platform.

This integration also strengthens security and governance by centralizing authentication within the Cloud Portal. Administrators can streamline access controls, while users benefit from single sign-on and reduced complexity when navigating between Pathway and other Infor OS applications

By having Pathway embedded within the Cloud Portal, users will experience a consistent user interface for both Pathway and Platform features.

## Pathway in Cloud Portal

Pathway UX is now embedded within the Infor Cloud Portal and utilises Single-Sign-On (SSO) for authentication. This means that Pathway users can access Pathway directly through the Cloud Portal instead of logging in via a separate web application URL. Users simply sign in to Infor Cloud Portal and navigate to the Pathway application.

## Cloud Portal Widgets

Infor Cloud Portal features widgets that are single-purpose applications that provide at-a-glance information or quick access to interactive functions. Widgets can be contextual, meaning that they can communicate with the application frame to publish relevant in-context information to the user. Cloud Portal widgets use Infor APIs to manage secure connections, handle authentication, and ensure that data flows smoothly between systems.

## Features and Guidelines

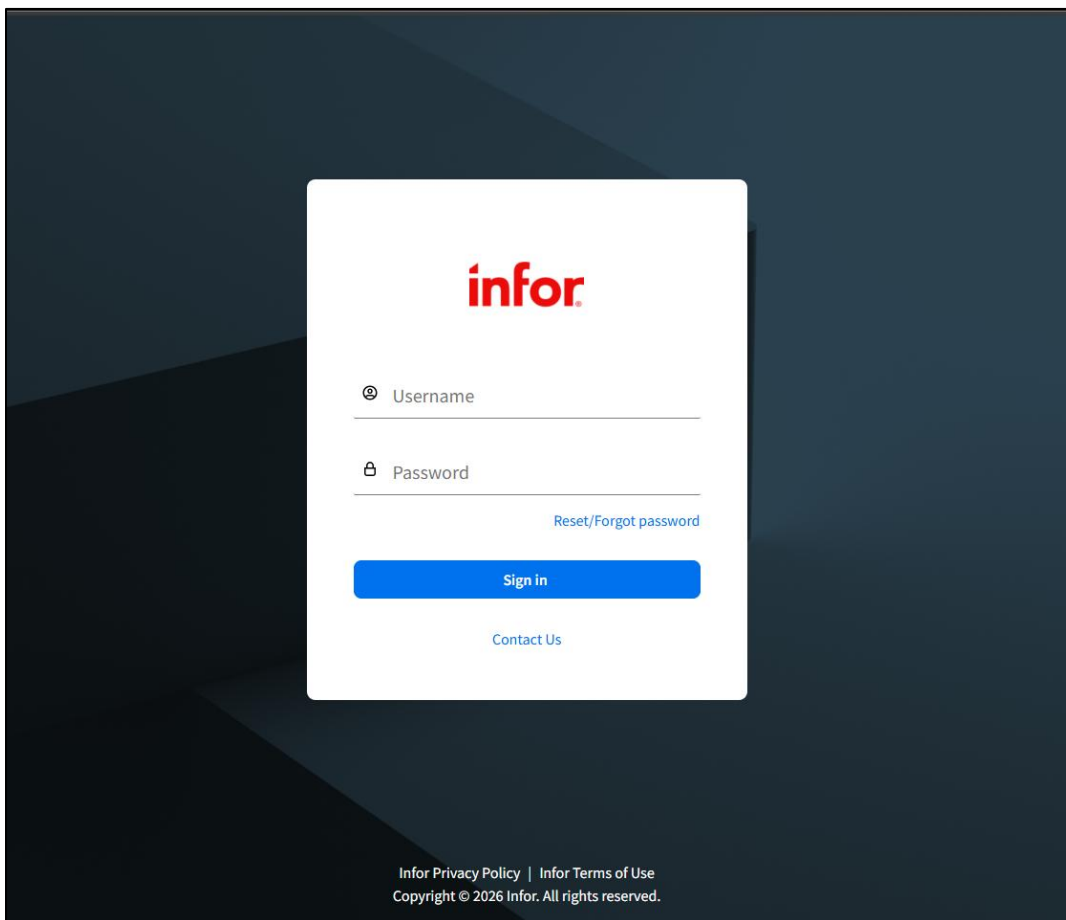
### Pathway in Cloud Portal

If customers decide to use Pathway embedded within the Cloud Portal, this presents some noticeable differences regarding how users will be able to access and use the Pathway application. Over time users will experience the benefits and additional capabilities when running Pathway within the Infor Cloud Portal.

The following screenshots represent how Pathway can be accessed through the Cloud Portal using Single Sign-On.

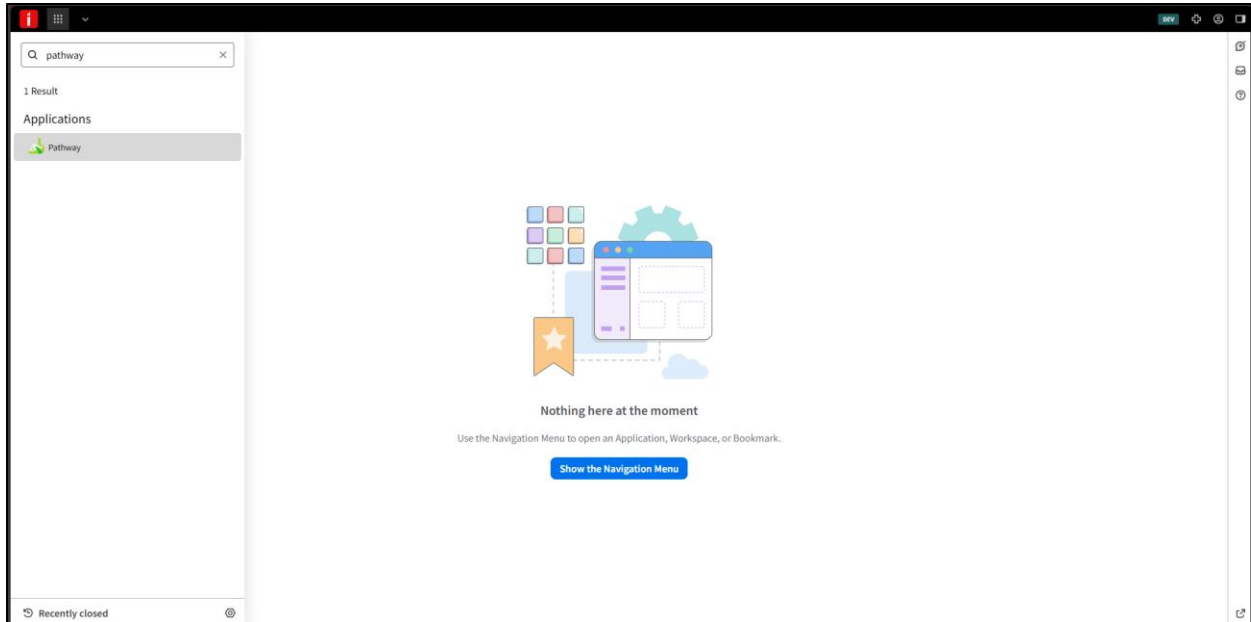
#### Cloud Portal login page

Given Pathway is configured in the Portal, users will be prompted with a new login form to access Pathway from the Infor Cloud Portal.



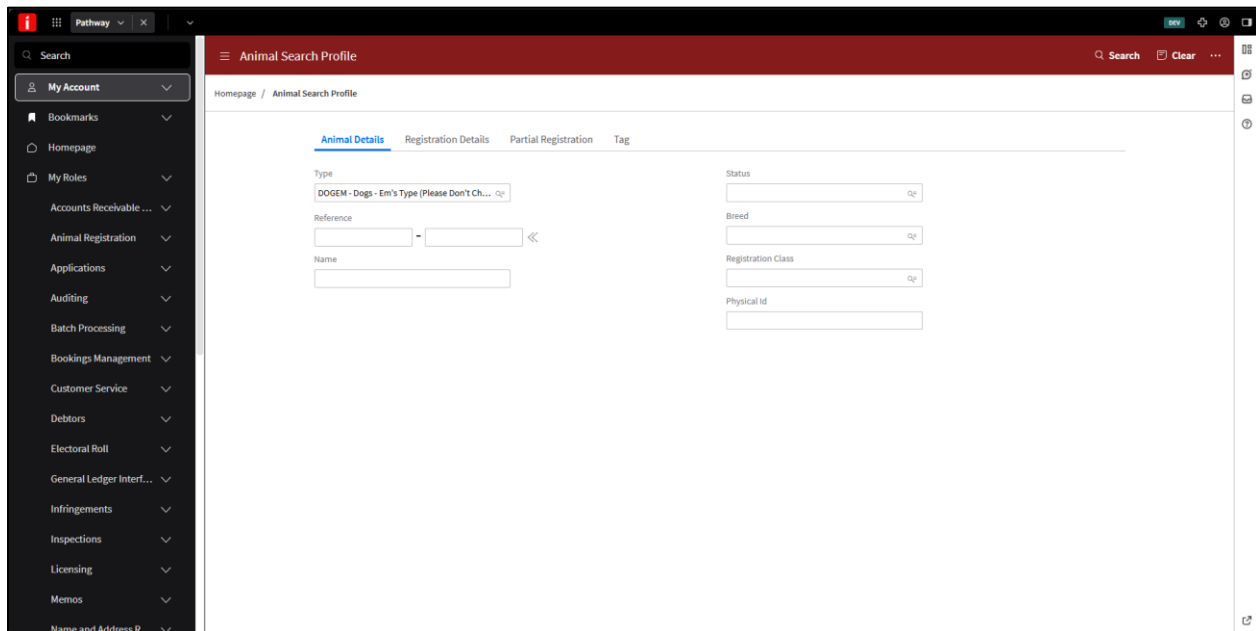
## Navigating to the Pathway

Users should have a security role **'Pathway-User'** assigned to their Portal account so they can find **Pathway** on the list of applications by searching for it on the Navigation menu within the Cloud Portal, or by navigating to **Portal** and browsing through the application lists.



## Pathway embedded in the Cloud Portal

The Pathway application will be opened as a new tab within the Cloud Portal and the user will be automatically logged in to Pathway UX (assuming the Pathway user's account was provisioned with SSO).



## Cloud Portal Insight Widgets

The available Pathway widgets are considered standard widgets. These widgets are available in the Widget Catalog. Standard Widgets can be configured as workspace widgets, insights widgets or can be both, but at present, the Pathway widgets are configured as insight widgets, which can be added through an insights group only.

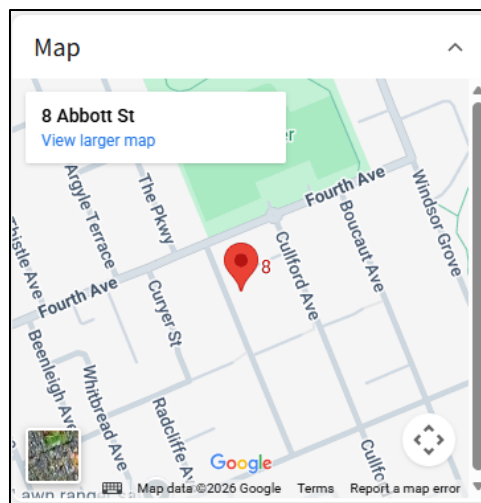
The following are specific widgets are now available:

### Map

The Map widget displays the address / location associated with a Pathway record. If a Pathway module supports multiple locations, the widget will show the primary address and if no primary address is designated, the widget will instead display the first address in the list.

The following Pathway modules support the Map insight widget:

- Customer Service
- Property Administration
- Applications and Licensing
- Animals
- Inspections



### Snapshot

The Snapshot widget will display key information regarding the Pathway record displayed. If a Pathway module supports multiple locations, the widget will show the primary address and if no primary address is designated, the widget will instead display the first address in the list. The details displayed will depend on the module supported by this widget.

The following Pathway modules support the Snapshot insight widget:

- Applications
- Licensing
- Customer Service
- Property Administration

Snapshot	
<b>Application Number:</b>	23/2011/APP1/123
<b>Type:</b>	Application Type 1
<b>Status:</b>	Lodged
<b>Location:</b>	8 Abbott Street, North Adelaide SA 5006
<b>Lodged:</b>	10-Feb-2026
<b>Applicants:</b>	G Bucol

## Workflow Tasks

The Workflow Tasks widget utilizes a task list component that will display all available Workflow Tasks from an Application or Licensing record. The workflow tasks that are displayed will follow the sequence as displayed within Pathway UX. Details such as the Workflow Task Name, Started Date, Completed Date, and the Status Indicator icon will be displayed in this widget.

Workflow Tasks	
'Umbrella' Task for Suspending/extending times Completed: February 10, 2026	Completed
Send Letter (Auckland)	Not Started
All User Tasks for Auckland Started: February 10, 2026	Started

The following Pathway modules support the Workflow Tasks insight widget:

- Applications
- Licensing

## Attachment

The Attachment widget displays all of the attachments for a Pathway record. The file name displayed in the widget represents the actual file name, and the hyperlink allows users to download the attachment. The file extension is also displayed for each attachment so that users are aware of the type of attachment.

The following Pathway modules support the Attachment widget:

- Customer Service: Requests
- Name and Address Register: Identity/Name
- Registers: Registry Entry
- Animal Registration: Animal Search
- Applications: Enquiry
- Licensing: Enquiry
- Inspections: Enquiry
- Property Administration: Enquiry
- Rates: Rates Assessment
- Booking: Requests

Attachment	
File Name	Extension
<a href="#">applicant form 3.pdf</a>	PDF

## Pre-requisites

1. Existing Pathway single-tenant (ST) SaaS customer (or customer who has signed a Pathway ST SaaS agreement) which includes the Infor OS (MT) Essentials license.
2. Infor OS was provisioned, and Portal OS user accounts were synchronized with Pathway. Refer to [Pathway in Cloud Portal](#) Provisioning section.
3. Pathway version at least 2026.01 and above.

## Provisioning

This section provides insights on how these Cloud Portal features are provisioned for eligible customers.

### Pathway in Cloud Portal

Pathway UX embedded in the Infor Cloud Portal will be made automatically available for all existing Pathway single-tenant (ST) customers who have gone live with SaaS and provisioned with an Infor OS environment. These eligible customers will have Pathway UX available in their Infor Cloud Portal once they have their environment and their user accounts synced.

User account synchronization is managed by the customer administrator in collaboration with the Pathway Services team. This process ensures that source records (e.g., Azure AD, Okta) are synced with Infor Federated Service (IFS) and that user claims remain consistently maintained within Pathway.

### Cloud Portal Widgets

Pathway Cloud Portal Widgets will be made available in all Infor OS environments provisioned to customers. These Pathway widgets can be browsed in the widgets catalog and added to an insights group.

## FAQs

### **Q: How do I login to Pathway UX via Infor OS?**

A: Pathway UX now supports SSO authentication from Infor Cloud Portal via the Infor Federated Services. With this, you will only need to login to Infor Cloud Portal and access will be provided to Pathway UX application within the Cloud Portal.

### **Q: I am a new user, how can I set up my credentials to use Pathway within Infor OS?**

A: Once your Infor OS account has been created by your tenant administrator, you will receive an email from *Infor CloudSuite Identities* that will include a link to set up your own account. Populate the fields and submit, once done you will be able to login to Infor OS portal.

### **Q: I can't find Pathway in my application list, what should I do?**

A: Please contact your tenant administrator or raise a support ticket to Pathway Support Team to verify whether the 'Pathway-User' role is assigned to your account. If not, request that the 'Pathway-User' role be added as one of your security roles.

### **Q: I tried opening the Pathway UX application inside Cloud Portal, but it just displays a white screen or an internal error message. What should I do?**

A: Try clearing the browser cache/history and enabling/disabling third-party cookies depending on your browser and see if this allows you to proceed. Otherwise, this may be caused by an invalid credential, so please reach out to Pathway Support Team to have your credentials validated and configured if needed.

### **Q: How can I access the Pathway insight widgets?**

A: To use Pathway Insight widgets, you first need to create an Insights Group for your embedded Pathway UX. Once the insights group is set up, you can browse the Widget Catalog and add widgets to it. The Pathway Insight widgets will appear in the widget catalog alongside other available widgets.

### **Q: Can I add the Pathway insight widgets to my Widget-based Workspace?**

A: No, the Pathway insight widgets are designed and configured only to be added inside an Insights Group.

## References and Appendices

### Glossary

Terminology	Definition
Infor Cloud Portal	Also known as Infor OS Portal, is an application framework that provides a common user interface for integrated Infor ERP applications.
Widgets	A widget is a small, single-purpose application that provides quick, at-a-glance information or quick access to simple interactive functions. Widgets are simpler and faster to access than full applications that may provide more functionality.
Widgets Catalog	The Widgets Catalog shows all widgets that you have permission to view.

### Infor Documentation for Infor OS Portal

Infor OS Portal Component	Infor Documentation
OS Portal Overview	<a href="https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=inforospug/ony1624482753147.html">https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=inforospug/ony1624482753147.html</a>
Security (IFS)	<a href="https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=inforos_security/cover.html">https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=inforos_security/cover.html</a>
Applications	<a href="https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=inforospag/lsm1436532871419.html">https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=inforospag/lsm1436532871419.html</a>
Insights Groups	<a href="https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=inforospug/sku1659722079583.html">https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=inforospug/sku1659722079583.html</a>
Widgets	<a href="https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=inforospug/awh1625083918094.html">https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=inforospug/awh1625083918094.html</a>

## Infor U OS Portal Trainings

Training	Infor U Training Link
OS Portal: Overview and Highlights	<a href="https://education.infor.com/course-list/course/01_9952303_eeen0050_ion">https://education.infor.com/course-list/course/01_9952303_eeen0050_ion</a>
Infor OS Platform: Security Overview	<a href="https://education.infor.com/course-list/course/01_9952306_eeen0051_ion">https://education.infor.com/course-list/course/01_9952306_eeen0051_ion</a>
Infor OS: Training Guide - Administering Workspaces and Insights	<a href="https://education.infor.com/course-list/course/01_9952310_den0059_ion">https://education.infor.com/course-list/course/01_9952310_den0059_ion</a>

## Infor Youtube Training Materials

Training	Infor Youtube Training Link
Infor OS Portal Admin Walkthrough	<a href="https://www.youtube.com/watch?v=h7hEhZP7HZo">https://www.youtube.com/watch?v=h7hEhZP7HZo</a>