

Sprint Notes

2026.03

infor Pathway

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<https://www.infor.com/en-au/products/pathway>

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Introduction

This document describes the corrections and added functions made available in Sprint 2026.03 of the Pathway, ePathway and Pathway Smart Mobile software.

Included in this document are the following sections:

Online Help

This includes an overview of how to access Pathway Help.

Modules

Each module which has undergone modifications is included in this documentation. The related information is now contained in the following documents:

- Infor Pathway Sprint Notes 2026.03.pdf
- Infor Pathway Sprint Notes Summary 2026.03.xlsx

Online Help

Help documents can be accessed from within the Pathway UX Client by using F1 on the keyboard. This opens User Guide information for the UX page you are on, where it is available.

Other Pathway documents are available via

<https://docs.infor.com/pathway/2026.03/en-us/useradminlist/default.html>

System - Functionality

Customer Type Maintenance

Case: SYDN CS0801043
UX Client

Work Item: 67574
ERS:

CUSTOMER TYPE FUNCTIONS

The following corrections have been made to the Customer Type Maintenance:

- With no ePathway Receipting System Parameters set up, clicking on Customer Type Functions from Customer Type Maintenance would result in an error being displayed.
- With the ePathway Receipting System Parameter Select User Payment Types turned off, clicking on Types for the ePathway Payments customer type function would display an error instead of ePathway Payments.

User Maintenance

Case: IPSW CS0699205, IPSW CS0815438
UX Client

Work Item: 65840
ERS:

DOCUMENT MANAGEMENT USER SECURITY MAINTENANCE

Using the Document Management Security option in User Maintenance now displays security details for the current User Account instead of all User Accounts.

The filtering in the data-grid by Authority from the System Administration >> Integration >> Document Management Parameters >> Document Management User Maintenance also now works correctly.

External Web Service - Application/Licensing Search Filters and Results

Case:
UX Client

Work Item: 67051
ERS:

METHODS FOR SEARCHING APPLICATIONS AND LICENSING

Changes have been made to the following External Web Service methods for searching in Applications and Licensing to add extra Workflow Task filtering, and allow to include Tasks against matching Applications and Licences in search results:

- CIFV5550.FindApplications
- CIFV5550.FindApplicationsByName
- CIFV5550.FindApplicationsByLocation
- CIFV5550.FindLicences
- CIFV5550.FindLicencesByName
- CIFV5550.FindLicencesByLocation.

The additional Task filtering includes:

- Estimated Start Date range
- Actual Start Date range
- Estimated Completion Date range
- Actual Completion Date range.

The SDK documentation details the new Task filtering fields and how to indicate whether Applications/Licensing search results need to include Tasks against matching Applications and Licenses. Request SDK documents by creating a Concierge request.

DPID Product Parameters

Case: UX Client	Work Item: 68165 ERS:
--------------------	--------------------------

EXPERIAN PARAMETER MAINTENANCE
ADDRESS TEMPLATE MATCHING MAINTENANCE

Experian Parameter Maintenance has been updated to enable the Matching option only for Address Templates that have validation enabled.

Address Template Matching Maintenance has also been updated to automatically disable validation for Prefix 1, Prefix 2, Prefix 3, or Identifier when no matching options are selected for that validation.

DPID Product Parameters

Case: GLEN CS1512746 UX Client	Work Item: 68517 ERS:
-----------------------------------	--------------------------

ADDRESS TEMPLATE MATCHING MAINTENANCE
EXPERIAN MATCH PARAMETER MAINTENANCE
ADDRESS SEARCH PROFILE
ADDRESS MAINTENANCE
REBUILD FORMATTED ADDRESSES
ADDRESS REMOVAL CONTROL

Special characters will now be correctly displayed and Address Template Matching Maintenance will reliably open Experian Match Parameter Maintenance when these characters are present.

Data-grid

Case: MERRI CS1081750, DARE CS1219104, GEEL CS1266437 UX Client	Work Item: 64901 ERS:
---	--------------------------

DATA-GRID

The data-grid Export to Excel function has been updated to correctly format the numeric values, ensuring totals and other calculations work as expected in Excel.

Home Page

Case: MACK CS1290280 UX Client	Work Item: 67541 ERS:
-----------------------------------	--------------------------

HOME

Charts on the Home Page that display Property Transfers (LPATRAN) now successfully drill into the Property Transfer.

Classic Version

Case: UX Client	Work Item: 67803 ERS:
--------------------	--------------------------

DEPRECATION OF CLASSIC VERSION IN THE PATHWAY UX CLIENT

The Classic Version of Pathway has now been removed from User Settings with only the New version now available. This change has been made as the Classic Version is no longer being updated with the latest Infor Design Standards and features.

Sign Out

Case: UX Client	Work Item: 68316 ERS:
--------------------	--------------------------

INFOR OS SIGN OUT

Pathway would not completely reset the browser when a Pathway session had expired when running in Infor OS. This would require the user to access the environment directly to reset it and allow for the SSO process to initiate again.

Business Event Notifications - Customer Service

Case: WODO CS1555345, BALL CS1624388, ADEL CS1637190 UX Client	Work Item: 68472 ERS:
--	--------------------------

INTERACTIVE NOTIFICATION

The Customer Service Business Event Notification (BEN) process has been changed to use the correct From E-mail Address value on the relevant e-mail template when a notification is sent immediately upon a user completing Request Entry or Request Maintenance on a single Customer Service Request.

Popup Message

Case: UX Client	Work Item: 68623 ERS:
--------------------	--------------------------

ERROR ICON DISPLAY

An error icon is now displayed to indicate that the popup relates to an error, as not all popups may be errors. This will help distinguish between popups that should be treated as a system error rather than a warning or information message.

Security Functions Request Type Allocation

Case:
UX Client

Work Item: 68652
ERS:

ERROR ASSIGNING OR UNASSIGNING

An error message was displayed when attempting to assign or unassign the Secured Functions

MyPathway Charts

Case: LAKE CS1440993
UX Client

Work Item: 68196
ERS:

CHART MAINTENANCE

Using the Chart Parameters option to provide a Custom Result Description for a chart based on a Query for the ESYUSER entity will now correctly resolve this override description when used in a chart.

Animal Registration

Animal Renewal Reminder Control

Case: IPSW CS0457965, WHIT CS0903255, MRSC CS0952705 UX Client	Work Item: 61570 ERS:
--	--------------------------

ANIMAL REMINDER CONTROL

Previously, when the Animal Reminder was performed, the report displayed the full registration amount for existing registrations instead of the outstanding balance.

Also, when an Animal Reminder Processed Job is exported, the Renewal field now displays the outstanding balance for existing registrations.

ePathway Disc Allocation

Case: IPSW CS1120406 UX Client	Work Item: 67170 ERS:
-----------------------------------	--------------------------

EPATHWAY DISC ALLOCATION MAINTENANCE

When allocating a disc for an Animal that has multiple owners this process will now create the letter with all the owners as the concatenated addressees of the letter rather than just using the first owner as the addressee.

Animal Maintenance

Case: MRSC CS0939191, MACK CS0986374, KNOX CS1501094 UX Client	Work Item: 68258 ERS:
--	--------------------------

ANIMAL MAINTENANCE

When the Registration Class is changed in Animal Maintenance, all outstanding or overpaid registrations within the current registration period will now be updated with the new Registration Class and Adjustment transactions will be posted for any fee differences with a system generated comment. Therefore, when an Animal Registration Class is changed and then a receipt is processed for an outstanding registration, the Registration Class on the Animal record will not revert to the previous class.

NOTE: Where a comment is entered in Adjustment Entry, it will override the system generated comment.

Animal Maintenance

Case: UX Client	Work Item: 68337 ERS:
--------------------	--------------------------

RELATED LICENCE FOR ANIMAL

Previously, it was not possible to link a Licence to an Animal when in Related Licence for Animal. The Add button was not displaying the Licensing Classes available for selection.

Applications

Application Maintenance

Case: BALL CS0309414, BALL CS0384320,
RAND CS1371583, ADEL CS1428850
UX Client

Work Item: 64391
ERS:

APPLICATION SUMMARY

The performance of the Letters option has been improved so that there is no longer a timeout error when it is selected.

Application Maintenance

Case: IPSW CS0330878
UX Client

Work Item: 64559
ERS:

FEE PAYMENT ALLOCATION

Allocations in Bank Guarantees and Bonds will now calculate correctly when deposit fees have been paid and refunded.

Names Maintenance

Case: IPSW CS0547329
UX Client

Work Item: 64662
ERS:

NAMES MAINTENANCE

Names Maintenance now allows for a subsequent new name to be added after saving previous changes in the following modules:

- Applications
- Bookings
- Case Management
- Debtors
- Licensing
- Property
- Rates
- Trade Waste
- Water Billing.

This required changing the Role Type selection from a Radio Group to a drop-down. The drop-down also works better on smaller devices.

Application Lodgement

Case: IPSW CS1073121
UX Client

Work Item: 67014
ERS:

NAMES MAINTENANCE:

During Application Lodgement, editing and saving Names now remains on Names Maintenance until close is selected, enabling multiple changes to be made.

Application Parameters

Case: IPSW CS1087309, HILLS CS1117763, SHIL CS1348119 UX Client	Work Item: 67137 ERS:
---	--------------------------

OVERRIDING CONTRIBUTION ACCOUNTS MAINTENANCE
OVERRIDING FEE ACCOUNTS MAINTENANCE

Previously, the validation of the Non-taxable Type field was incorrect. The Non-taxable Type is mandatory when tax is not being applied to the Fee.

Application Maintenance

Case: IPSW CS1043818 UX Client	Work Item: 67521 ERS:
-----------------------------------	--------------------------

BUILDING COMPONENTS MAINTENANCE

When selecting a new component in the swap-list and then choosing a material, the newly assigned component will now be saved correctly.

Application Parameters

Case: WHIT CS1277882 UX Client	Work Item: 67545 ERS:
-----------------------------------	--------------------------

PPARS PARAMETER MAINTENANCE

PPARS Parameter Maintenance has been updated to allow multiple Objection Response Types to be selected. Responses matching these Response Types will be used by the Planning Permit Activity Reporting System (PPARS) extract to determine the number of submissions received for an application.

Planning Permit Activity Reporting (PPARS)

Case: WHIT CS1277882 UX Client	Work Item: 67545 ERS:
-----------------------------------	--------------------------

PPARS EXTRACT CONTROL - FULL/CORRECTIONS RETURN

PPARS Extract Control for Full and Corrections returns has been updated to allow multiple Objection Response Types to be selected. Responses matching these Response Types will be used by the Planning Permit Activity Reporting System (PPARS) extract to determine the number of submissions received for an application.

Owner Names Update Report

Case: DUNE CS1386264
UX Client

Work Item: 68641
ERS:

OWNER NAMES UPDATE CONTROL

The Owner Names Update Report menu option has been restored to the Applications > Batch menu.

Core Interface

External Data Validation

Case: UX Client	Work Item: 67732 ERS:
--------------------	--------------------------

*** Authorised Function ***

*** Australia only ***

NOTE: Changes have been developed for the Pathway UX client only.

INFORMATION DETAILS VALIDATION

New Authorised Function named Business Number Validation has been added to extend Pathway UX validation capabilities to the Name's Information Details. It is now possible to configure External Data Validation (EDV) Products with product Validation Usage of Business Number Validation and associate this product to any Information Type.

The screenshot shows a table with one row for 'Business Number Validation'. The columns are: Application (set to '[A]'), Description (set to 'Business Number Validation'), Expiry Date (set to 'd/MM/yyyy'), Access Code (set to '[A]'), Active (checked), and Status (set to 'Authorised').

Application	Description	Expiry Date	Access Code	Active	Status
[A]	Business Number Validation	d/MM/yyyy	[A]	☒	Authorised

Image 1 Business Number Validation Authorised Function

Access to the ABN Lookup web service provided by the Australian Business Register (ABR) is free of charge.

The configuration elements required are outlined below:

- System Administration >> Integration >> System Parameter Maintenance
- Name and Address Register >> Name and Address Parameters >> External Data Validation Product OR
- System Administration >> Integration >> External Data Validation >> External Data Validation Product
- Name and Address Register >> Name and Address Parameters >> Information Type Parameters.

Integration's System Parameter Maintenance

Via menu System Administration >> Integration >> System Parameter Maintenance.

Use the new Use Information Details External Data Validation switch to enable / disable the external validation of the information details if required. This setting is disabled by default when the authorised function is first enabled.

Image 2 System Parameter Maintenance

External Data Validation Product Search Profile

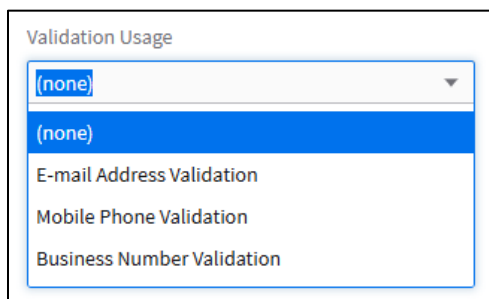
New Validation Usage option named Business Number Validation is available now.

Use External Data Validation Product Search Profile to search for the configured external data validation products and open maintenance.

This can be accessed via two menu options:

- System Administration >> Integration >> External Data Validation >> External Data Validation Product
- Name and Address Register >> Name and Address Parameters >> External Data Validation Product.

Image 3 External Data Validation Product Search Profile



Validation Usage

(none)

(none)

E-mail Address Validation

Mobile Phone Validation

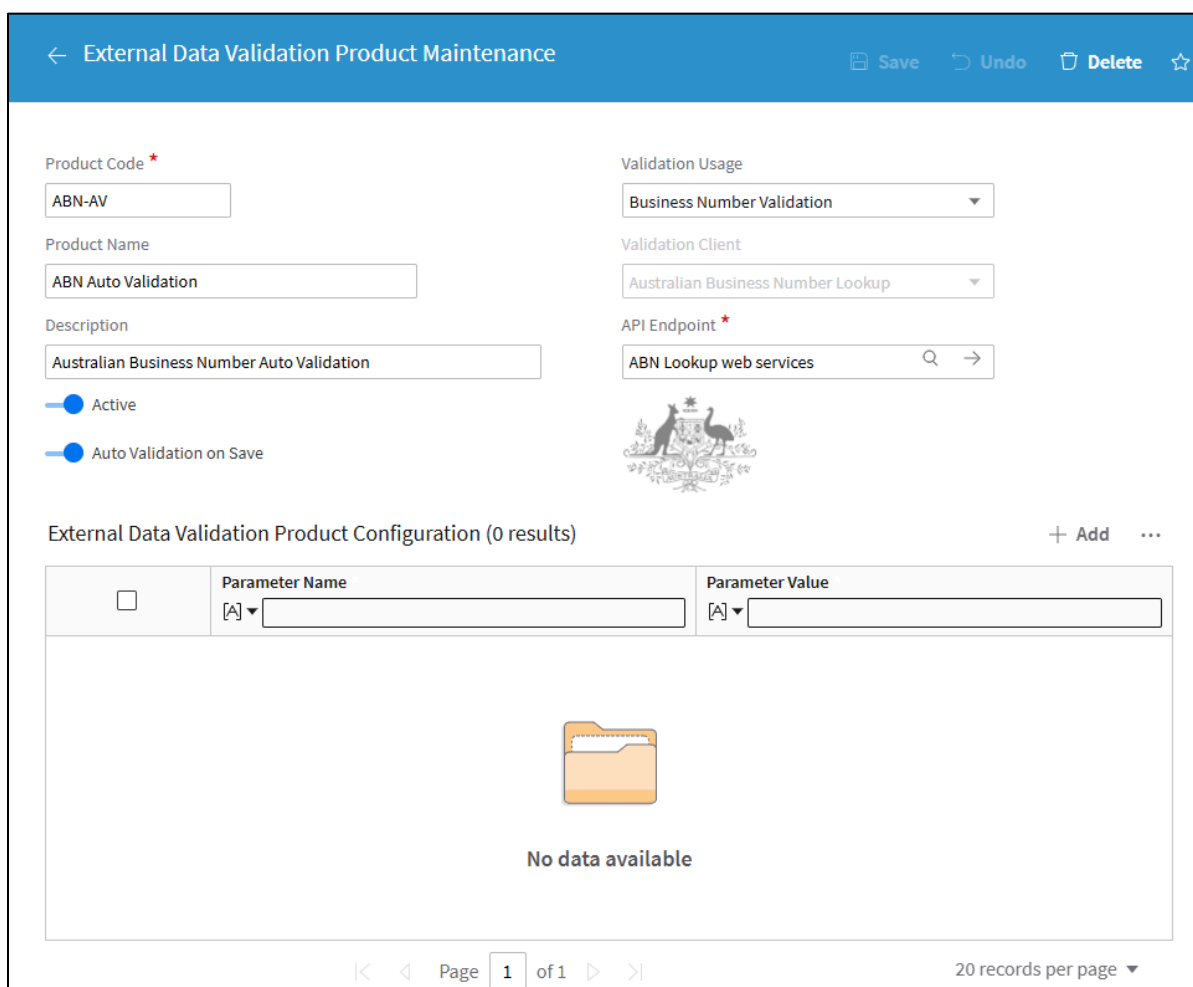
Business Number Validation

Image 4 Validation Usage allowed values

External Data Validation Product Maintenance

A new Validation Usage option, Business Number Validation, is now available. Selecting this option automatically sets the Validation Client value to Australian Business Number Lookup.

Use External Data Validation Product Maintenance to add, update, or delete external data validation products.



← External Data Validation Product Maintenance

Save Undo Delete ☆

Product Code *
ABN-AV

Product Name
ABN Auto Validation

Description
Australian Business Number Auto Validation

Validation Usage
Business Number Validation

Validation Client
Australian Business Number Lookup

API Endpoint *
ABN Lookup web services

Active

Auto Validation on Save

External Data Validation Product Configuration (0 results) + Add ...

	Parameter Name	Parameter Value
☐	[A]	[A]

No data available

Page 1 of 1 20 records per page ▼

Image 5 External Data Validation Product Maintenance

Name and Address Register - Information Type Maintenance

Via menu Name and Address Register >> Name and Address Parameters >> Information Type Parameters.

New fields have been introduced to support configuring data validation for an Information Type when required. Use the new fields below to configure the data validation for an Information Type when required.

- Data Validation:
 - Used to link a Data Validation Product to the Information Type when validation is required.
 - Only External Data Validation Products with usage of Business Number Validation will be available for selection.
 - Default value: Null.
- Validation Severity:
- Define whether errors returned by External Data Validation will prevent the form being saved.
- Allowed Values:
 - Null – (none)
 - E – Error
 - W – Warning
 - Default Value: Null
- This field becomes enabled and mandatory when a Data Validation value is selected; otherwise, it is disabled and not mandatory.
- Clearing the Data Validation field will automatically reset the Validation Severity to Null.

NOTE: Validation Severity is required because some returned errors do not necessarily make the value invalid. For example, when external system problems have prevented the validation request from completing.

NOTE: It is recommended that validation be set to Warning to ensure new Names and data changes can be saved as expected.

The screenshot shows the 'Information Type Maintenance' interface. It has a header bar with 'Information Type Maintenance', 'Save', 'Undo', and a menu icon. Below the header, there are tabs for 'Information Type' and 'Sequence'. The main content area is titled 'Information Type (20+ results)' and includes a '+ Add' button. A table lists several information types with their validation settings.

☐	Information Type	Applies To	Entry Format	Data Validation	Validation Severity	Active
☐	ABN	Person & Company	[A]	ABN-AV - Australian Business Number Auto	WARNING	☒
☐	Accreditation Category	Person & Company			(NONE)	☒
☐	ACN	Person & Company			(NONE)	☒
☐	Architect Reg. No.	Person & Company			(NONE)	☒

Image 6 Information Type Maintenance

The screenshot shows the 'Data Validation' lookup interface. It is titled 'Data Validation (2 results)'. It contains a table with columns for Product Code, Product Name, Description, and Active status. Below the table, there are pagination controls and buttons for 'Cancel' and 'Apply'.

Product Code	Product Name	Description	Active
ABN-AV	ABN Auto Validation	Australian Business Number Auto Validation	☒
ABN-MV	ABN Manual Validation	Australian Business Number Manual Validation	☒

Page 1 of 1 | 25 records per page

Cancel Apply

Image 7 Data Validation lookup

Personal Name Maintenance and Company Name Maintenance

Via menu Name and Address Register >> Name and Address Maintenance >> Name Search Profile > Select Name Type (Personal or Company) > Search.

Information Details data validation will be performed on the Personal Name Maintenance and Company Name Maintenance. Only Information Details records from an Information Type linked to an active External Data Validation Product can be validated. Based on the External Date Validation Product configurations, there are two supported validation methods:

- Manual Validation, using a Validate button in the data-grid header.
- Automatic Validation, which validates the data on Save.

Manual Validation

Select a single Information Details record and click the Validate button. The Validate button will only be enabled if the Validate on Save setting is not active for the External Data Validation Product linked to the Information Type of this Information Details record.

Automatic Validation

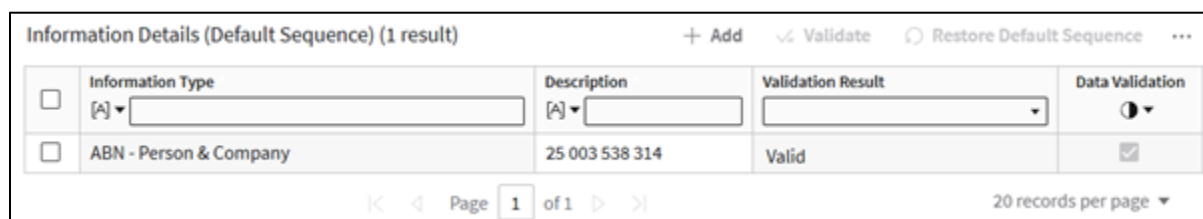
On Save, automatically validates the Description value using the linked External Data Validation Product. The Information Details record will be validated only when all conditions below are met:

- The Information Type of the Information Details record has an active External Data Validation Product configured.
- Either:
 - The value of the Description field has changed, or
 - The value of the Description field has never been validated before.

Tracking Validation Results

Two new fields have been introduced to the Information Details data-grid:

- Data Validation
- Validation Result.



Information Details (Default Sequence) (1 result)			
	Information Type	Description	Validation Result
☐	[A]	[A]	
☐	ABN - Person & Company	25 003 538 314	Valid

Page 1 of 1 | 20 records per page

Image 8 Information Details

Data Validation Field

Used to determine whether an External Data Validation Product is configured for the Information Details record. When a Product is linked, the field's Tooltip, Image 9, displays key information about the Product such as: Code, Name, Active status, and the Auto Validation on Save flag.

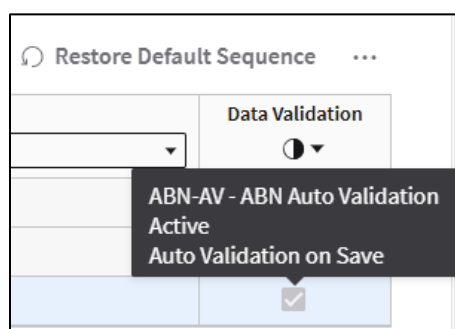


Image 9 Data Validation Field and Tooltip

Validation Result Field

Used to display previous validation results when available, in addition to the outcome of the latest manual or automatic validation performed by the user in the current session. The Validation Results allowed values are: Valid, Invalid and Undetermined. The field's Tooltip (Hover Text) displays more information such as the Entity Name, ABN, and the ABN status returned by the External Data Validation, Images 10, 11 and 12.

Information Type	Description	Validation Result	Data Validation
ABN - Person & Company	25 003 538 314	Valid	☒

Image 10 Validation Result Field

Description	Validation Result	Data Validation
25 003 538 314	Valid	☒

Image 11 Valid

Description	Validation Result	Data Validation
85 003 538 314	Invalid	☒

Image 12 Invalid

Validation Process

When External Data Validation is performed in the current session, the validation outcome is assessed and mapped into one of the allowed Validation Results as follows:

Validation Result	Description
Valid	The value has passed validation; the field can be saved normally.
Invalid	The value has failed validation; in this case we consider the value of the Validation Severity setting of the Information Type as follows: Error Validation Severity: The response will be displayed as an error; the field cannot be saved until the data is corrected. Warning Validation Severity: The response will be displayed as a warning; the field can be saved as per normal. Null: Validation Severity is not set, handle it same as the Error Validation Severity. This should never happen if the field is configured correctly.
Undetermined	The returned response will be displayed as a warning; the field can be saved normally. Sometimes the provider is unable to conclusively verify or invalidate the value.

For Manual Validation the results will be displayed directly in the data-grid using validation icons, Image 13.

Description	Validation Result	Data Validation
85 003 538 314	Invalid	☒

Image 13 Manual Validation

For Auto Validate on Save, the results will be displayed in a message dialog and when no errors exist, the form will Save and reload, Image 14.

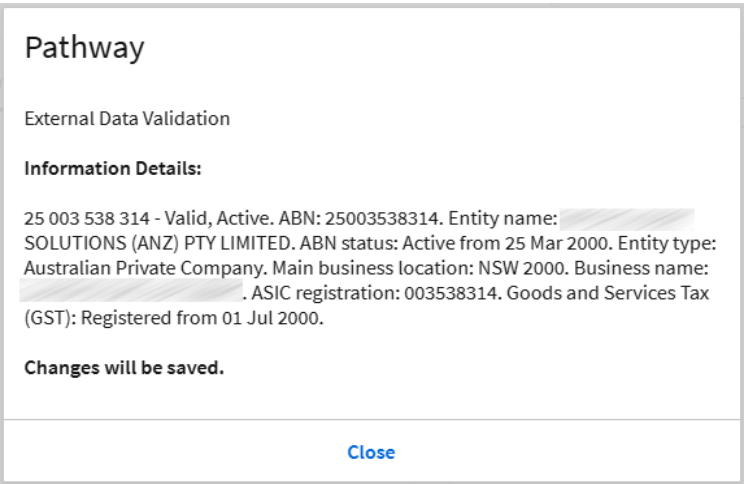


Image 14 Message dialog without errors

Otherwise, when errors exist, closing the message will display the validation results directly in the data-grid using validation icons, Images 15, 16, and 17.

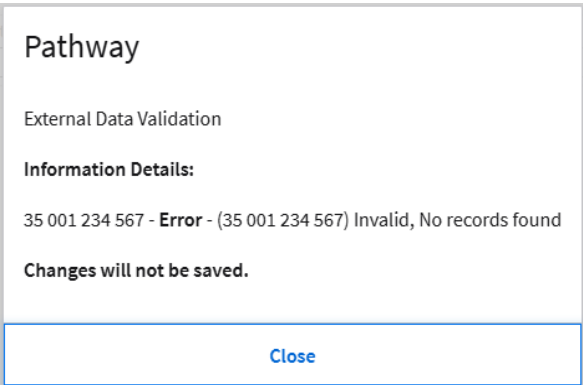


Image 15 Message dialog with error

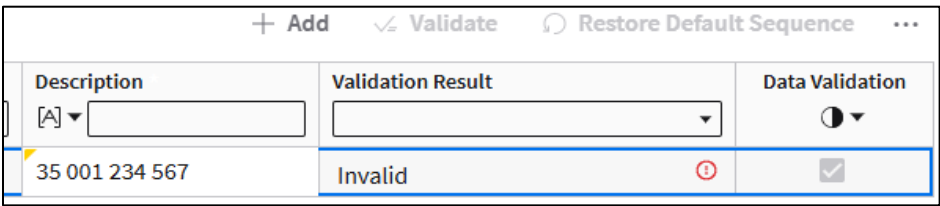


Image 16 Validation Icons

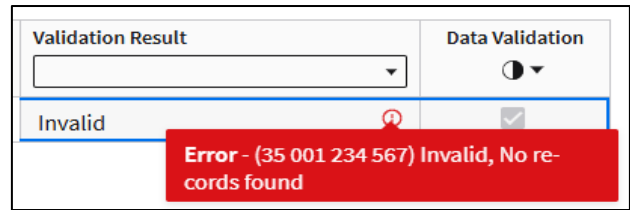


Image 17 Error Tooltip

NOTE: Existing Australian Business Number Information Type data has not been validated and will need to be reviewed.

AUSTRALIAN BUSINESS NUMBER LOOKUP WEB SERVICE SETUP

Disclaimer

Infor is not responsible for the customer's ABN Lookup account, its configuration, its availability, or any limitations imposed by the Validation Service Provider. Each customer is responsible for obtaining and maintaining their own active account with the ABN Lookup Web Service, including any required registrations, subscriptions, licensing, or prepaid credit balances (where applicable). The authentication key (GUID) issued by the ABN Lookup service is unique to each customer and must be used only by that customer.

By uploading their authentication information into Pathway, the customer authorises Infor to use that key solely for the purpose of retrieving data from the ABN Lookup service on the customer's behalf. Pathway does not use this key for any write operations and does not use it for any purpose other than performing the configured validation requests.

The ABN Lookup service provides the following usage statement: The Registrar of the Australian Business Register (ABR) monitors the quality of the information available on this website and updates the information regularly. However, neither the Registrar of the ABR nor the Commonwealth guarantee that the information available through this service (including search results) is accurate, up to date, complete or accept any liability arising from the use of or reliance upon this site.

API Endpoint Maintenance

Via menu System Administration >> Integration >> API Endpoints >> API Endpoint Maintenance.

Configure new API Endpoint to be used to access the ABN Lookup web services as follows:

Endpoint Name (Example)	ABN Lookup web services
Icon	ABR - Australian Business Register
Description (Example)	ABN Lookup web services used in the ABN Information Types External Data Validation (EDV)
Endpoint URL	https://abr.business.gov.au/abrxmlsearch/AbrXmlSearch.aspx
Authentication Type	API Key
Request Header (Name)	AuthenticationGuid
Request Header (Value)	The GUID provided by the ABN Lookup web service in the registration e-mail.

Pathway will automatically send requests to the API method SearchByABNv202001 for ABN Validation.

API Endpoint Maintenance

Save Undo Delete ☆

Endpoint Name *
ABN Lookup web services

Icon *
ABR - Australian Business Register

Description *
ABN Lookup web services used in the ABN Information Types External Data Validation (EDV)

Characters left 410

Endpoint URL *
https://abr.business.gov.au/abrxmlsearch/AbrXmlSearch.aspx

Authentication Type
API Key

Request Header (1 result) + Add ...

	Header Name	Header Value
☐	AuthenticationGuid	The GUID provided by the ABN Lookup web service in the registration email.

< < Page 1 of 1 > >

20 records per page ▼

Image 18 API Endpoint Maintenance

Australian Business Number Lookup Web Service Responses

The ABN Lookup web service returns a payload containing the original request and the search response. When the HTTP status code of the response is 200, the response body will contain one of the following:

- If the request was unsuccessful:
 - Exception
- If the request was successful:
 - Business entity

Exception

Exception is an application error; The Exception response body contains an Exception Code and Description.

For full list of exceptions refer to: <https://abr.business.gov.au/Documentation/Exceptions>

Business Entity

Pathway expects the ABN Lookup web service to return a business entity of type BusinessEntity202001.

The following attributes are extracted from the response business entity if available and displayed in the validation message:

- ABN
- ABN Status
- Replaced By
- Replaces ABNs
- Entity type: Generally speaking, a business entity is either an individual or a non-individual. For example, (IND) Individual/Sole Trader, (PRV) Australian Private Company, (PUB) Australian Public Company, ...etc.
- Entity Name: The name that appears on all official documents or legal papers. The entity name may be different from the business name. For individuals, this is the Legal Name; for non-individuals, it is the Main Name.
- Main Business Location: State and Postcode.
- ASIC number (ACN or ARBN or ARSN or ARFN)
- Business Name: A business name is the name the business operates under. A person must register a business name if they run a business in Australia and are not trading under their own name.
- Goods and Services Tax (GST)

Except for the ABN and ABN Status, all attributes are optional:

- This is to handle suppressed ABN details.
- The only information available on ABN Lookup for suppressed ABNs is the ABN, ABN status and GST and charity tax concession registrations.

For more information refer to:

- <https://abr.business.gov.au/Documentation/WebServiceResponse>
- <https://abr.business.gov.au/Help/Glossary>
- <https://abr.business.gov.au/Documentation/DataDictionary>

Pathway will map the http (200) OK response to Pathway validation results as follows:

Pathway Validation Result	Response Body
Valid	Business Entity where the Entity Status Code is Active
Invalid	Business Entity where the Entity Status Code is Cancelled and Exceptions with the following Code and Description: SEARCH - No records found. WEBSERVICES - Search text is not a valid ABN or ACN. WEBSERVICES - An ACN is invalid in ABN Search
Undetermined	All other Exceptions - Because not all exceptions are related to the ABN validity. For example: WEBSERVICES - System problems have prevented this request from completing.

For http errors such as (404) Page not found and (500) Internal server error, Pathway will throw an application-level exception that includes the details of the http error returned by this web service.

NOTE: New Zealand validation of Company Number Validation will be developed in a future release.

NOTE: This function will be available only to sites that have the required authority. Contact your Account Manager if your site requires this function.

Customer Service

Request Entry

Case: WTOR CS0769623
UX Client

Work Item: 63329
ERS: 114543

NOTES FIELD

The Notes field within Request Entry will now automatically expand its height to display more lines.

Debtors

Direct Debit Extraction

Case: IPSW CS0526203
UX Client

Work Item: 65607
ERS:

DIRECT DEBIT EXTRACTION

The Direct Debit Extraction process can be initiated from Debtors >> Batch Processing Functions >> Direct Debit Extraction and from Rates Accounting >> Batch Processing Functions >> Direct Debit Extraction. Both cater for extracting direct debit details for Debtors.

A new function has been added to Debtors >> Parameters >> Debtors Parameter Maintenance to enable an override prefix to be provided for use by the extraction process. The new field is called Direct Debit Extract Reference Prefix which has a default value of "RA" when not overridden. If there is a need to have the direct debit extract reference prefixed with a different value such as "DR" for debtor direct debit details this can now be easily changed.

SPECIAL INSTRUCTIONS

Where a batch queue is being used for the Direct Debit Extraction in either:

- Debtors >> Batch Processing Functions >> Direct Debit Extraction
- Rates Accounting >> Batch Processing Functions >> Direct Debit Extraction.

Restart the batch queue.

Batch Document Maintenance

Case: GEEL CS0741343
UX Client

Work Item: 66515
ERS:

BATCH DOCUMENT LINE MAINTENANCE

Previously, when a Project Code was selected in the Account override Allocation data-grid, the Account was not defaulted from the Ledger Project Offset Account and it was not a mandatory field.

Document Management

ePathway Core

Case: SYDC CS1765773
UX Client

Work Item: 69233
ERS:

EPATHWAY DOCUMENT LIST VIEWER

The new Document List Viewer option introduced to allow viewing of EDMS documents nominated as publicly viewable via ePathway, could previously produce an error message in log files saying **Field RETRDATE:d.CIFGENS not available** that could affect the operation of the viewer.

Electoral Roll

Election Maintenance

Case:
UX Client

Work Item: 68061
ERS:

ELECTION MAINTENANCE

Several changes have been made to cater for South Australian (SA) Electoral Roll legislation changes in relation to:

- The requirement to be able to enter Nominees for Companies and Owner/Occupier Groups, and
- The requirement to be able to enter a Head Lessee and have them extracted as an Owner if they are not an Occupier.

For additional details please refer to the Functional Specification which is available upon request.

ELECTION EXTRACT

Changes have been made to:

- Where an Owner/Occupier/Head Lessee is a Company, extract the Company's Nominee instead of the Company,
- Extract a Head Lessee as an Owner if not also an Occupier,
- Where there are multiple Owners, if a Voters Owner Group Nominee has been entered and that name is also an Owner, position that Owner (or their Nominee if the Owner is a Company) first in the Owner Group so it will be prioritised to receive the vote on behalf of the Owner Group. Similarly for Occupiers.

New exception report messages have been implemented.

If a Nominee is missing for a Company:

- Nominee missing for Company Owner XYZ Resources Pty Ltd
- Nominee missing for Company Occupier XYZ Resources Pty Ltd
- Nominee missing for Company Head Lessee XYZ Resources Pty Ltd.

If an Owner, Occupier or Head Lessee Nominee is not a Person name:

- Nominee ABCD Lawyers Pty Ltd is not a Person for John Citizen.

If a Voters Owner Group Nominee is not present as an Owner (or Head Lessee). Similarly for the Voters Occupier Group:

- Voters Owner Group Nominee ignored because name not extracted as an Owner or Owner Nominee
- Voters Occupier Group Nominee ignored because name not extracted as an Occupier or Occupier Nominee.

If a Company name Owner is present on multiple Titles for a Property and their Nominee(s) are entered on more than one and are different:

- Multiple different sets of Nominees on Property for Owner XYZ Resources Pty Ltd.

If a given name would have been extracted multiple times into the same Owner/Occupier Group. Only one example of this message is included:

- Owner John Smith already extracted as Owner Nominee.

Also, a correction has been made to prevent the Extract from terminating abnormally where an inactive name was present.

Also, a correction has been made to the Extract to prevent it creating a Group with no members in the situation where a property had multiple Owners (or multiple Occupiers) all with Denied Reasons. This situation previously caused the Election Merge stage to terminate abnormally.

ELECTOR SEARCH PROFILE

A change has been made to include the Vote Type Description e.g. Sole Owner in the search results displayed when searching using the Vote Details search tab.

A correction has been made to prevent a mostly blank form being displayed if a search is performed on the Vote Details search tab without entering any search criteria. This problem only occurred if there was many Votes extracted into the Election being maintained.

For SA Electoral Roll sites, the Nominee option is now available and allows for searching Nominees by Owner or Occupier. These Role Types are selected in the Advanced Options section of the Name Search Profile (Vote Search), after the Nominee option has been chosen.

ELECTOR MAINTENANCE

These changes have been made for SA Electoral Roll sites:

- The Group Nominee Application Received Date for a Vote that was extracted as an Owner Group Nominee or Voters Occupier Group Nominee is now displayed in the Votes grid.
- The State Roll/Nominee section has been renamed to Owner/Occupier for Nominee and now also displays the Company Nominee Application Received Date for a Vote that was extracted as an Owner Nominee or Occupier Nominee.

ELECTION VOTE ASSIGNMENT

Changes have been made for SA Electoral Roll sites to cater for the legislation changes around the handling of Nominees. For details, please refer to the Functional Specification which is available upon request.

ELECTION EXPORT

Changes have been made for SA Electoral Roll sites:

- The Vote Type (field VOTETYPE on the reporting entity LRPER02) can now also be one of the following values:
 - OWNNOM (Sole Owner Nominee)
 - GRPOWNNOM (Group Owner Nominee)
 - OCCNOM (Sole Occupier Nominee)
 - GRPOCCNOM (Group Occupier Nominee).
- Two existing reporting entity fields previously not used for SA sites are now extracted with the following values:
 - Field RCAPPRCVDAT contains the Application Received Date pertaining to the nomination of a Nominee to vote on behalf of a Company (as entered against an Owner/Occupier/Head Lessee Nominee).
 - Field RCEXPDATE contains the Application Received Date pertaining to the nomination of a Nominee to vote on behalf of a Group (as entered against a Voters Owner/Occupier Group Nominee).

ePathway System

Content Scanning of Uploaded Files

Case: UX Client	Work Item: 65028 ERS:
--------------------	--------------------------

FILE UPLOAD

The File Upload process has been improved so that issues with the file content, a virus or empty files will not trigger an error but instead will display a validation message.

Export Data

Case: UX Client	Work Item: 66838 ERS:
--------------------	--------------------------

EXPORT DATA

New pages have been created to view the Export Data, as this can be useful to correct any Exports that have a status of Error.

ePathway Verified Single Sign On

Case: UX Client	Work Item: 67190 ERS:
--------------------	--------------------------

*** Authorised Function ***

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

ePathway Verified Single Sign On, also referred to as Pre Authorised Single Sign-On, or PreAuthSso, has been introduced in ePathway. This function enables a site's identity provider e.g. Azure AD B2C, to securely redirect users to ePathway and perform automatic sign-in. This facilitates the creation and synchronisation of ePathway Web User accounts from the site's identity provider into ePathway. When a public user logs into the site's website and is redirected to ePathway, ePathway validates the identity provider request and automatically logs the public user into ePathway if the request is valid.

The PreAuthSso process will try to match an existing Pathway Name in the Name and Address Register (NAR) and automatically create an ePathway Web User account and register that account in Pathway. Meaning that customers can immediately start using ePathway with the functions assigned to the Default Customer Type.

The ePathway Web User account and the NAR record created or linked to it, can be checked by staff later for accuracy, duplicate names etc.

The PreAuthSso matching process is looking for an exact match based on the:

- Given Name/s,
- Surname,
- Default e-mail Communication Type as set up in Name and Address Register.

The second stage of the PreAuthSso exact match process requests an address. This is the final piece of data required before:

- the search for an exact match to an existing Name in Pathway, or
- the creation a new Name in Pathway.

ePathway supports two methods for capturing the address details that will attempt to be matched to the Pathway Default Address:

- Formatted Address, where all components are entered as a free format, Image 1, or
- Address Line 1 and Address Line 2, Image 2.



Image 1

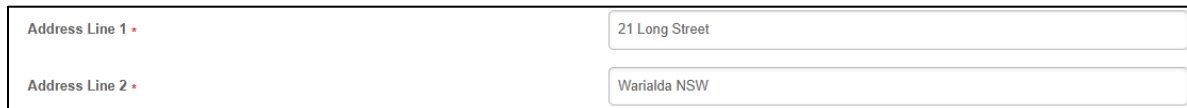


Image 2

The linking process is designed to support both formats by deconstructing the Default Address, where possible, and performing the best possible match based on the available information:

- If there is no matching address a new address will be created.
- If there are two Default Addresses that match, one will be selected.
- If the address can't be made to fit any of the defined templates under Name and Address Register >> Name and Address Parameters >> Address Template Parameters, the fallback is the Unknown Template selected in Name and Address Register >> Name and Address Parameters >> Name and Address System Parameters.
- Override Addresses are not part of the process.

RECOMMENDATION: Create a Customer Type like UNVER - Unverified and make it the Default Customer Type so that all new ePathway Web User accounts are created with that Customer Type. Once the ePathway Web User account has been verified, the Customer Type can be changed to another Customer Type like VER - Verified. This enables staff to review each registration to ensure duplicate names and addresses, or even duplicate ePathway user accounts, are corrected. A chart can be created to identify the UNVER - Unverified Customer Type.

Implementation Summary

Changes are required in these areas:

1. Pathway authorised functions:
 - ePathway Verified Single Sign-On and
 - Name and Address External Web Services is an existing authorised function.
2. Infor OS.
3. ePathway web config.
4. Pathway configuration.
5. ePathway System Parameters and Page Layout.

NOTE: This is a complex integration, so these notes are an overview only and not every system or process is included. Please contact the Services Team if you require further assistance with the implementation of this function.

Pathway Authorised Functions

Enable the required authorised functions under System Administration >> System Parameters >> System Parameter Maintenance – Options – Authorised Function, Image 3.

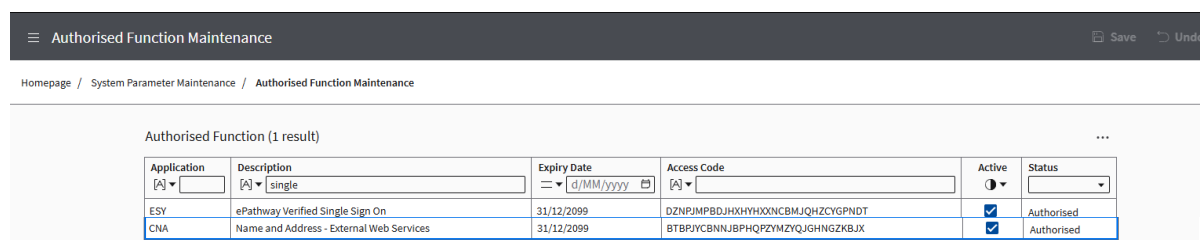


Image 3

Infor OS

From within Infor OS under API Gateway >> Authorized Apps create a new account with the IFS role of UserAdmin and download the credentials. In these instructions the account is referred to as ePathway Test.

Create the ePathway Test user by navigating to Infor OS Security >> User and click on '+' to create the new user and make sure to allocate the UserAdmin role to the user account, Image 4.

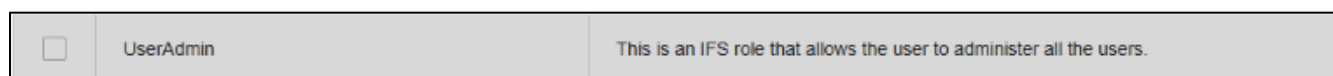


Image 4

This is a summary of the security rules now assigned to the ePathway Test user account, Image 5.

☐	Security Role	Description
☐	ACL_DW	ACL for Drawing
☐	EPM-CustomTest	Testing for User Roles
☐	Infor-SuiteUser	Users with this role have access to Portal
☐	IR-LNConsumer	Each user assigned this role has the rights to: run reports, view reports and set personal preferences (for languages, time zones etc.).
☐	TESTERP	Test all users assign.
☐	UserAdmin	This is an IFS role that allows the user to administer all the users.

Image 5

In the Infor OS portal, the IFS Service API Gateway should be Active as shown in Image 6.

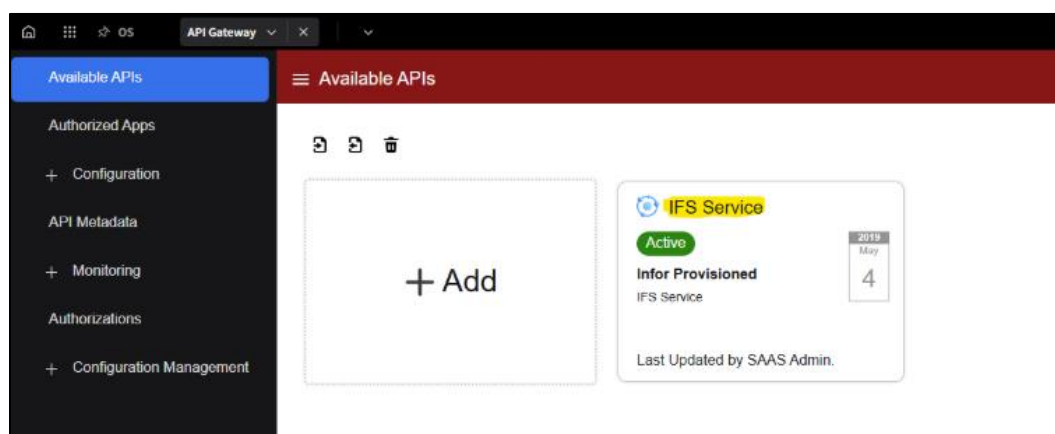


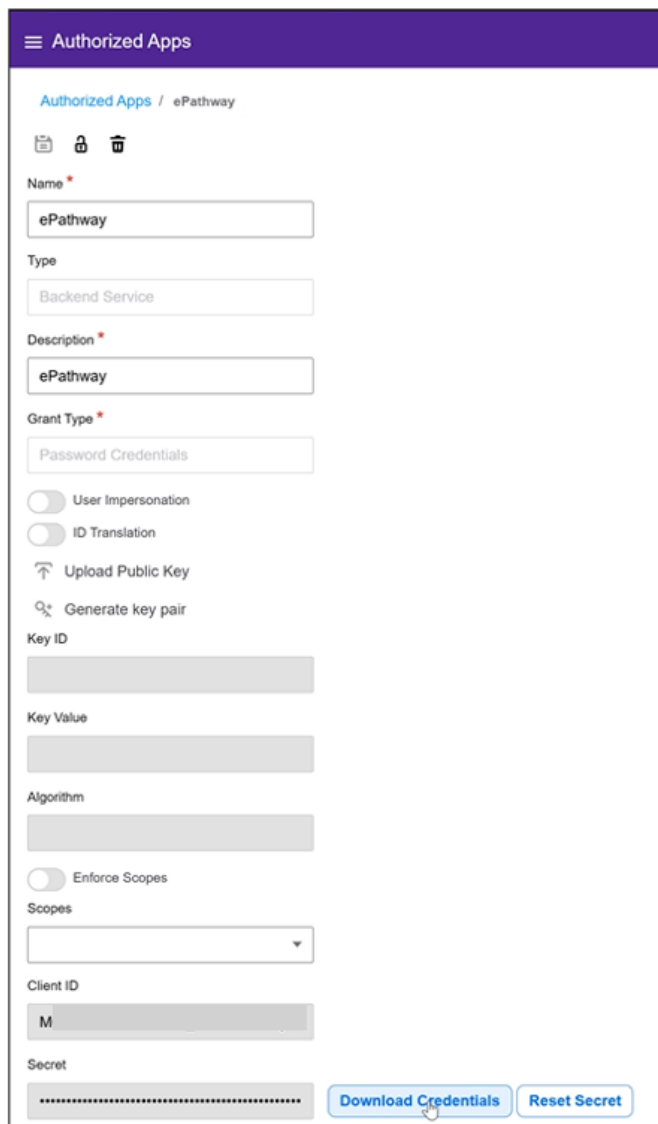
Image 6

You will need to create an Authorized App for ePathway, which will then have the ePathway test user account assigned to it. When creating the App:

- enter a Name
- set the Type to Backend Service
- enter a Description

- leave all other fields as shown.

Image 7 shows a completed Authorized App. Click on Download Credentials to open that screen.



The screenshot shows the 'Authorized Apps' configuration page for 'ePathway'. The page has a purple header with a menu icon and the text 'Authorized Apps'. Below the header, there is a breadcrumb 'Authorized Apps / ePathway' and three icons: a calendar, a lock, and a trash can. The form contains the following fields and controls:

- Name ***: Text input with 'ePathway'.
- Type**: Text input with 'Backend Service'.
- Description ***: Text input with 'ePathway'.
- Grant Type ***: Text input with 'Password Credentials'.
- User Impersonation**: Toggle switch (off).
- ID Translation**: Toggle switch (off).
- Upload Public Key**: Button with an upward arrow icon.
- Generate key pair**: Button with a key icon.
- Key ID**: Text input (empty).
- Key Value**: Text input (empty).
- Algorithm**: Text input (empty).
- Enforce Scopes**: Toggle switch (off).
- Scopes**: Dropdown menu (empty).
- Client ID**: Text input with 'M'.
- Secret**: Text input with masked characters (dots).

At the bottom right, there are two buttons: 'Download Credentials' and 'Reset Secret'.

Image 7

Image 8 shows the Download Credentials page. Click on Download to download the credentials that will be used to configure the ePathway System Parameters.

Download Credentials

Service account credentials will only be included if Create Service Account is enabled

☒ Create Service Account

Associate a user with this service account if the request needs to be made with user context.

Full Name

ePathway Test x

Select the scopes that this service account will access.

Scopes

Select the User Management property for ID translation

This will be your only opportunity to download these credentials. You are responsible for storing these credentials securely.

⚠ To retrieve a token service account key and secret are mandatory

DOWNLOAD

CANCEL

Image 8

The downloaded file will look like the text below:

```
{
  "ti": "MCESTESTE_U_TST", << SingleSignOn.InforOS.TenancyName
  "cn": "ePathway",
  "dt": "12",
  "ci": "MCESTESTE_U_TST~sdfr32432FJKDHKH#43f3lkjlkJLK", << SingleSignOn.InforOS.OAuth2.ClientId
  "cs": "SO91_O11pcPoFKEN...", << SingleSignOn.InforOS.OAuth2.ClientSecret
  "iu": "https://servername",
  "pu": "https://servername:443/MCESTESTE_U_TST/as/", <<
  SingleSignOn.InforOS.OAuth2.TokenEndpointUrl should be the url constructed from "pu" and "ot".
  "oa": "authorization.oauth2",
  "ot": "token.oauth2", << SingleSignOn.InforOS.OAuth2.TokenEndpointUrl should be the url constructed
  from "pu" and "ot".
  "or": "revoke_token.oauth2",
  "sc": [],
  "ev": "N1509114991",
  "v": "1.1",
  "saak": "MCESTESTE_U_TST...", << SingleSignOn.InforOS.OAuth2.ServiceAccount.Username
  "sask": "0EsU9hFC4..." << SingleSignOn.InforOS.OAuth2.ServiceAccount.Password
}
```

NOTE: ... means the value has been partially hidden and `servername` should be replaced with your site's server name.

Use this information to configure ePathway System Parameters.

ePathway Web Config

When the identity provider calls ePathway the process will verify the request for authenticity. Two new web config settings have been introduced for Signature validation, as shown in bold below.

```

<secureAppSettings>
  <!-- ORIGIN Request Validation Set up. -->
  <!-- When ePathway is connected with the external Council System (like AzureB2C or aws or
caching provider), this set up would necessary to validate the signature of incoming request. -->
  <!-- The secret which is shared with the external system to generate the signature. -->
  <add key="OriginSharedSecret" value="" />
  <!-- maximum allowed time difference (in seconds) to prevent replay attacks -->
  <add key="OriginAllowedDriftSeconds" value="300" />
</secureAppSettings>

```

NOTE: Don't forget to add your site's secret to the Config.

Pathway Configuration

In System Administration >> ePathway >> System Parameters >> User Field Types Maintenance there is a new user function type named PreAuthSSO, Image 9

Homepage / User Registration Field Types Maintenance

User Function Type (7 results) → Fields ...

Function Type	Description	Active	Activation Required	Activation Expiry Days	Activation Attempts
AUTOSSO	Automatic User Single Sign On	☒	☐		
AUTOUSER	Automatic User Registration	☒			
CHANGEUSER	Change User Details	☒			
LOGINHELP	Login Assistance	☒			
NEWUSER	New User Registration	☒	☐		
PREAUTHSSO	Verified Pre Authorised Single Sign On	☒			
USERENQ	User Enquiry	☒			

Image 9

Click on Fields to view the allocated fields. If the fields aren't assigned, please assign them and make all the fields mandatory except User Name, as it isn't required for the registration to be made, Image 10.

Homepage / User Registration Field Types Maintenance / User Field Types Maintenance

Function
Verified Pre Authorised Single Sign On

Available Fields		Function Fields			
Field		Field	Mandatory	Auto Update	Priority Update
On Behalf Of Company Name		User Name	☐		
Customer Type		Surname/Company Name	☒		
Address Line 1		Given Names	☒		
Address Line 2		Formatted Address	☒		
Formatted Address Id		Email Address	☒		
Mobile Phone Number					
Agency Code					
Licence No					
ACN					
Delivery Method					
Payment Method					

Image 10

NOTE: Fields related to Username, First Name, Last name and E-mail address will be displayed as read only fields in the ePathway Registration page.

NOTE: Formatted Address can be replaced with Address Line 1 and Address Line 2.

Run an export to ePathway via System Administration >> ePathway >> System Processing >> Web Server Export, Image 11, to make the fields available for use in ePathway.

Export:

- User Field Export
- User Field Types Export.

The screenshot shows the 'Export Control' interface. At the top, there's a 'Search Profile' bar. Below it, the section 'Export to Web Server (4 results)' displays a table of export options. The table has two columns: a checkbox and the export name. The options are 'User Function Type Export', 'User Field Export' (checked), 'User Field Types Export' (checked), and 'User Export'. Below the table, there's a 'Submission' section with a 'Description' field containing 'ePathway SSO' and a 'Run Type' dropdown set to 'Immediate'. Navigation controls at the bottom show 'Page 1 of 1' and '20 records per page'.

Image 11

ePathway Configuration

System Parameters

In ePathway under Configuration – System Parameters, turn on Advanced and scroll down to SingleSignOn. SingleSignOn parameters include parameters for other systems, so these are the specific parameters for this new function:

Configuration Setting	Configuration Detail	Side Notes
SingleSignOn.InforOS.IFSServiceEndpoint	IFS service endpoint used to access and verify user records (for ex, ifsservice/usermgt/v2/users/search). The URL should not include the method name.	The value should be ifsservice/usermgt/v2/users/search unless advised by Infor.
SingleSignOn.InforOS.IONApiBaseUrl	Infor OS API Base URL used to access ION APIs. This value can be obtained from the .ionapi file downloaded from Infor OS under Authorized Applications > Download Credentials.	
SingleSignOn.InforOS.OAuth2.ClientId	OAuth 2.0 client identifier issued by Infor OS, used for the Pre-Authorisation flow.	Use the downloaded credentials.

SingleSignOn.InforOS.OAuth2.ClientSecret	OAuth 2.0 client secret associated with the Infor OS client ID, used for the Pre-Authorisation flow.	Use the downloaded credentials.
SingleSignOn.InforOS.OAuth2.ServiceAccount.Password	Password for the Infor OS service account used to obtain OAuth2 access tokens, used for the Pre-Authorisation flow.	Use the downloaded credentials.
SingleSignOn.InforOS.OAuth2.ServiceAccount.Username	Username of the Infor OS service account used during OAuth2 token acquisition, used for the Pre-Authorisation flow.	Use the downloaded credentials.
SingleSignOn.InforOS.OAuth2.TokenDuration	Duration (in minutes) for which the OAuth2 access token remains valid, used for the Pre-Authorisation flow.	
SingleSignOn.InforOS.OAuth2.TokenEndpointUrl	Infor OS token endpoint, used for the Pre-Authorisation flow.	
SingleSignOn.InforOS.TenancyName	Infor OS Tenancy name. This can be obtained from the cloud url. ex: MCETESTAPAC_PROD	
SingleSignOn.PreAuthSSO.Enabled	The process authenticates users via a third-party claims provider such as Azure B2C. It requires integration setup; contact Infor for details on enabling this functionality.	This parameter appears only in the ePathway database and should be enabled using a script by setting the value to True.

A further parameter can be turned on under Registration. To turn this on turn Advanced off and scroll to Registration:

Configuration Setting	Configuration Detail	Side Notes
Registration.Email.PreAuthSso	Set this flag on if an e-mail is required to be sent to the customer on registration.	

ePathway Registration Page

Configure the registration page for the PreAuthSSO Registration process, Image 12, to capture user address details:

1. Navigate to Layout > Page Layout > ePathway User Registration > PreAuthSSO > Pages.
2. Select the page associated with PreAuthSSO Registration.
3. Configure the page to capture the required user information.

User Registration

This page allows you to maintain the Dynamic Layout for the User Registration types.

Code	Description			
NEWUSER	New User Registration	Disclaimer	Text	Pages (1)(2)
LOGINHELP	Login Assistance		Text	Pages (1)
USERENQ	User Enquiry		Text	Pages (1)
CHANGEUSER	Change User Details		Text	Pages (1)
AUTOUSER	Automatic User Registration	Disclaimer	Text	Pages
EXTUSER	External Logon User	Disclaimer	Text	Pages (1)(2)
AUTOSSO	Automatic User Single Sign On	Disclaimer	Text	Pages
PRAUTHSSO	Pre Authentication Single Sign On		Text	Pages (Undefined)

Legend:
 (1) Not all available fields have been included on the page/s.
 (2) Not all mandatory fields have been included on the page/s.

Cancel Update

Image 12

A sample page layout is show in Images 13 through to 16.

Pages

This page shows you all of the pages for the selected module type.

User Registration Type Verified Pre Authorised Single Sign On

Seq.	Title	Image Url	Image Text	Instructions	Delete
1	Complete Registration				Groups ☐

Cancel Add Update

Image 13

Page Group Fields

This page shows you all of the page groups for your selected page.

User Registration Type Verified Pre Authorised Single Sign On
Page Complete Registration

Seq.	Title	Group Rule	Image Url	Image Text	Instructions	Label Width	Delete
1	Your Details	No additional rules applicable				200	Fields ☐
2	Required Detail	No additional rules applicable				200	Fields ☐

Cancel Add Update

Image 14

Page Group Fields

This page shows you all of the fields available for the selected page group.

User Registration Type Verified Pre Authorised Single Sign On
Page Complete Registration
Group Your Details

Seq.	Label	Label O'ride	Width	Lines	Hover Text	Validator Regular Expression	Validator Message	Min. Value	Max. Value	Data Type	Boolean Display Action	Same Row	Display Only	Upper Case	Confirm Summary	Drop Down Select	Mandatory	Delete
1	Given Names	☐	200							String	☐	☐	☐	☐			☒	☐
2	Surname/Company Name	☐	200							String	☐	☐	☐	☐			☒	☐
3	Email Address	☐	200							String	☐	☐	☐	☐			☒	☐

Cancel View the Result Continue

Image 15

Page Group Fields

This page shows you all of the fields available for the selected page group.

User Registration Type Verified Pre Authorised Single Sign On
Page Complete Registration
Group Required Detail

Seq.	Label	Label O'ride	Width	Lines	Hover Text	Validator Regular Expression	Validator Message	Min. Value	Max. Value	Data Type	Boolean Display Action	Same Row	Display Only	Upper Case	Confirm Summary	Drop Down Select	Mandatory	Delete
1	Formatted Address	☐	200	2						Memo	☐	☐	☐	☐			☒	☐
2	User Name	☐	200							String	☐	☐	☐	☐			☐	☐

Cancel View the Result Continue

Image 16

NOTE: the User Name can be added into the same form as the Formatted Address and it is then displayed to the customer as a read only field during the registration process.

Registration E-mail

To send an e-mail at registration, configure the email text under ePathway User Registration > Page layout – PREAUTHSSO, Image 17.

PREAUTSSO Verified Pre Authorised Single Sign Or Text Pages (1)

Image 17

NOTE: When ION creates the user account in the system from council's identity provider, the process will already send an email to the user notifying the account should be ready in few minutes.

ePathway Error Messages

Within ePathway go to Layout – Text

Change the Value to Login & Passwords and Search will automatically occur, Image 18.

Configuration Layout Enquiries Certificates Impersonation Web Service Gateway Other Home

Text

This page allows you to maintain the static Text in the system. You can search by module or by the Text value itself.

Search by

Value

Search

Image 18

Scroll down to PreAuthSso. Image 19 shows the existing messages.

Code	Default Text	User Text	Hover Text
PreAuthSso.InvalidOperation	You are not permitted to perform this action. Please contact your administrator if you believe this is an error.		
PreAuthSso.MalformedRequest	Hmm.. Something looks incorrect. We could not process your request at this time. Please try again later		
PreAuthSso.ProcessError	We encountered an issue while processing your request. Our team has been notified. Please try again in a few moments.		
PreAuthSso.UnAuthorisedFlowRequest	This request is not authorised. Please ensure you are accessing the system through the approved single sign-on process.		
PreAuthSso.UserNotExist	Your account is currently being set up. We will notify you by email once the setup is complete. Alternatively, please try again later.		

Image 19

Verify New User Registrations

Each new user registration created by this process will automatically be attached to the default Customer Type. It is recommended that each new registration be attached to a default Customer Type called Unverified or Pending Verification to enable staff to verify the registration data and ensure duplicate names and addresses are corrected immediately.

Name Category EPWSSO will be automatically created when the first ePathway SSO registration generates the first name. The Name Category is hard coded in Pathway and can be used to search for Names created by the ePathway Single Sign On process.

Once the registration has been verified the Customer Type would be changed from Unverified to another verified Customer Type. You may also consider only offering basic functions in the Unverified Customer Type, providing more ePathway functions on the verified Customer Types.

Customer Types are set up under System Administration >> Customer Profile Parameters >> Customer Type Maintenance, Image 16.

Customer Type Maintenance							Save	Undo
Homepage / Customer Type Maintenance								
Customer Type (1 result)							+ Add	→ Customer Type Functions ...
☐	Customer Type [A] ▼	Description [A] ▼ ver	Default 0 ▼	Auto Update Users 0 ▼	Limited 0 ▼	Active 0 ▼		
☐	PENDVER	Pending Verification	☒	☐	☐	☒		

Image 16

To create the new Customer Type PENDVER Pending Verification click on Add, enter the code and description and tick Default on. Then click on Customer Type Functions to assign the functions an unverified ePathway user account should have access to. Images 17 and 18 show Customer Requests that have been assigned.

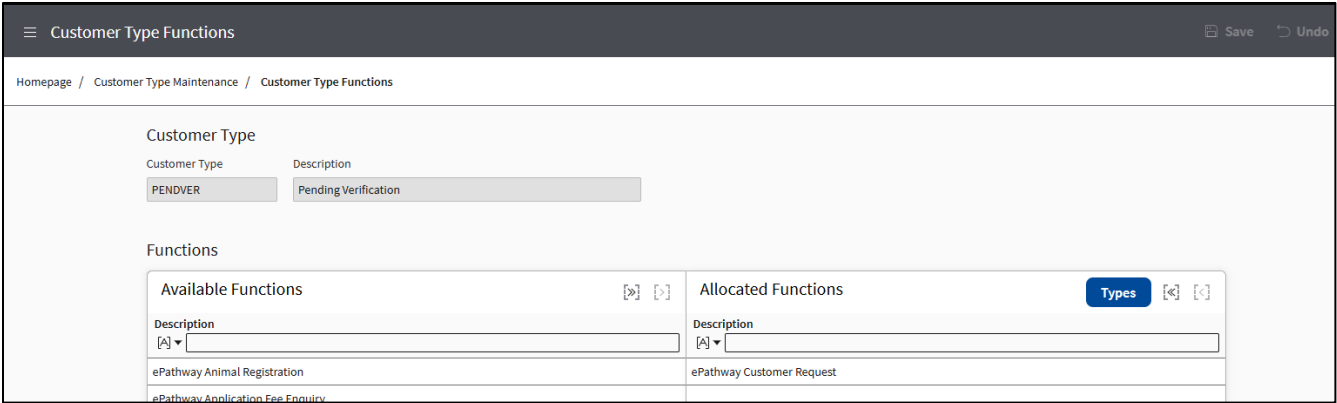


Image 17

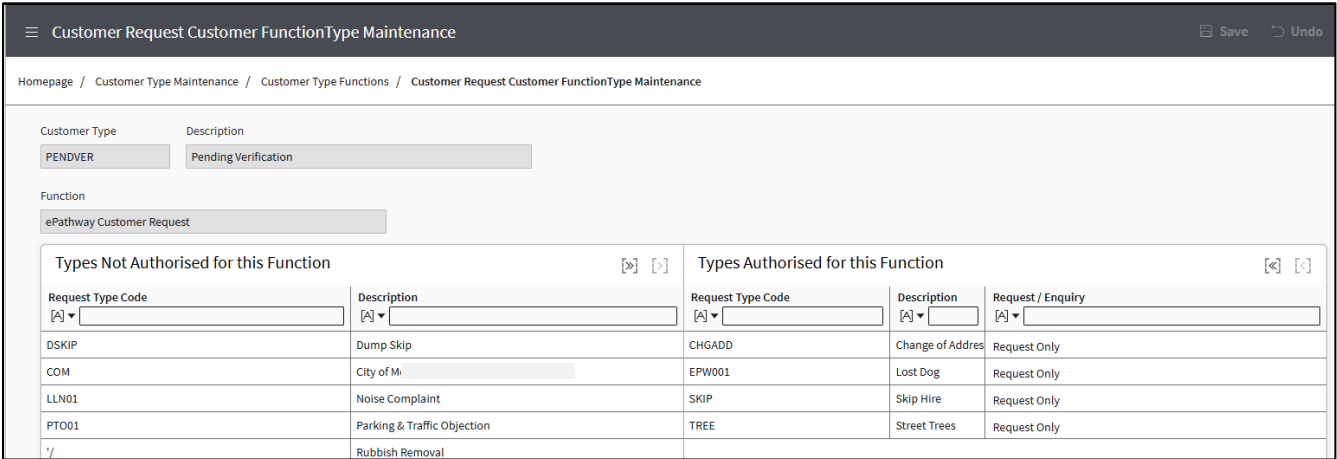


Image 18

Individual ePathway user accounts are managed via System Administration >> ePathway >> System Parameters >> Web User Maintenance, Image 19.

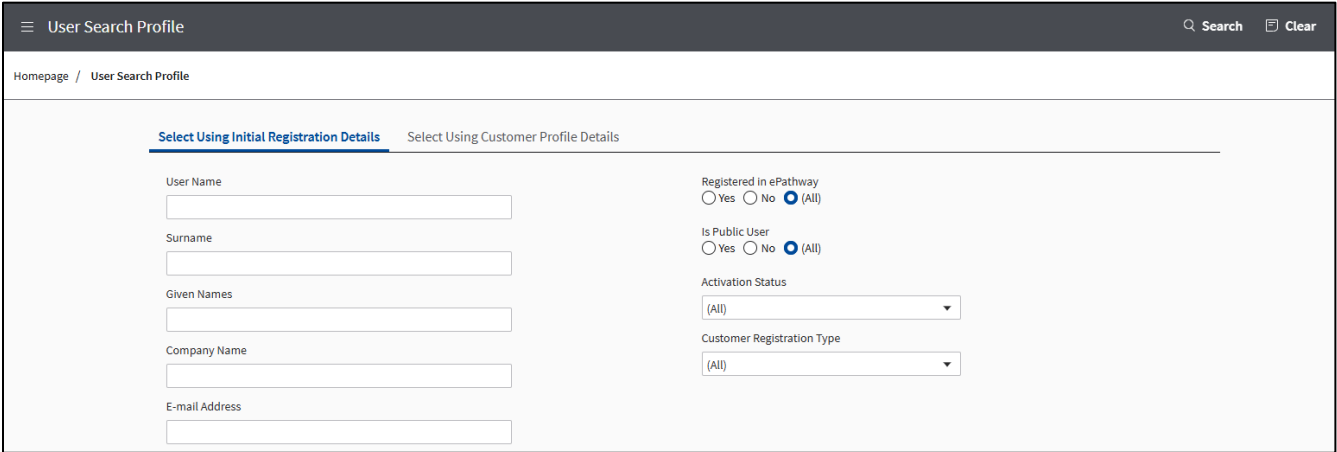


Image 19

To manage unverified registrations it is recommended a Home chart be used. To set up the query the chart will use, go to Query >> Query Maintenance and select New, Image 20.

Query Search Profile

SearchClearNew

Homepage / Query Search Profile

Profile

Description

Entity

Q=

Model

Order By

Description

Derived Type

(All)

Image 20

Enter a Description and enter ESYUSR in the Select field.
For Conditions click on Add and enter the information as shown in Image 21.
In Group By click on Add and select USERNAME in Field.
Save.

Query Construction

SaveUndo

Description *

ePathway Registration Pending Verification

Select *

ESYUSER - User

Q=

Model

ESY - ePathway System

Derived

(none)

Conditions (1 result)

+ Add ...

☐	And/Or	(	Entity	Field	Operator	Value	)
☒			ESYUSER - User	CDECCPTYPE - Customer	=	1	

<<>>

Page 1 of 1

>>

20 records per page

Group By (1 result)

+ Add ...

☐	Entity	Field	Overriding Description
☒	ESYUSER - User	USERNAME - User Name	User Name

Image 21

Then select Options – Advanced, Image 22.

Query Construction

SaveUndoDelete

Description *

ePathway Registration Pending Verification

Select *

ESYUSER - User

Q=

Model

ESY - ePathway System

Derived

(none)

Conditions (1 result)

☐	And/Or	(	Entity	Field	Operator		
☒			ESYUSER - User	CDECCPTYPE - Customer Type Code	=	1	

Options

Advanced

Process

Results

Current Jobs

Delete Processed Jobs

Job Statistics

Field Properties

Image 22

Click on the Edit SQL button, Image 23.

← Advanced Query Construction

Query Construction / Advanced Query Construction

Query Description * Entity * Model

ePathway Registration Pending Verification ESYUSER - User ESY - ePathway System

Override SQL Statement

insert into CQYSLCT select distinct {{Query_Result_TPK}}, replace(replace(isnull(rtrim(ESYUSER.USERNAME), ''), '%', '%25'), ',', '%3B') + ';', ESYUSER.TPKESYUSER from ESYUSER where ESYUSER.CDECCPTYPE = '1'

Edit SQL

Image 23

Replace the Override SQL Statement with this SQL:

```
INSERT INTO CQYSLCT
SELECT DISTINCT {{QUERY_RESULT_TPK}},
REPLACE(REPLACE(ISNULL(RTRIM(ESYUSER.TPKESYUSER), ''), '%', '%25'), ',', '%3B') +
';', ESYUSER.TPKESYUSER
FROM ESYUSER, CCPTYPE, CCPPROF
WHERE CCPTYPE.SYSDEFAULT = '1' AND (CCPPROF.TPKCCPPROF
= ESYUSER.TFKCCPPROF AND CCPPROF.TFKCCPTYPE = CCPTYPE.TPKCCPTYPE)
```

To ensure the query generates a result, go to System Administration >> ePathway >> System Parameters >> Web User Maintenance and change the Customer Type on a test user account to the new pending verification Customer Type using Options – Customer Profile.

Run the query via Options – Process, to create a result and this will make the chart visible in the Home page. Once visible in the Home page the chart results will automatically update each time the Home page is opened.

Remember the name of the query as it will be attached to the chart that will be created next.

Create a chart via System Administration >> System Parameters >> MyPathway Charts.

Click on New and enter a Code, Description, Chart Type and in the Query field click on the pop-up and search for the query created earlier, as shown in Image 24.

← Chart Maintenance

Save Undo ☆

Chart Parameters
Reports
Field Properties

Chart

Code * Description *

PENDVER EPW User Acc Pend Ver

Chart Type *

GAUGE - Gauge Chart

☐ In Context ☐ External ☒ Active

Definition

Query Total Query

ePathway Registration Pending Verification

Image 24

Options – Chart Parameters, Image 24 above. Use these fields to set up colours and labels in the gauge; turn on Hide when no results or add a Custom Result Description as shown in Image 25.

Gauge Chart Parameters

Minimum Value	The minimum value the chart will start from, which defaults to zero.
Maximum Value	The maximum value the chart will finish at, which defaults to 100.
Range One Value (Range Two and Three Values have the same purpose)	Add a number to set a range. Each range will appear as a different colour and can have a different label.
Range One Label (Range Two and Three Labels have the same purpose)	Add a label to each range.
Hide when no results	The chart will not display if the query returns zero results.
Custom Result Description	Right click in the field and alternative tokens can be selected to replace the default Result Description that displays in a chart.

← Chart Parameter Maintenance

SaveUndo

Chart Maintenance / Chart Parameter Maintenance

Code

PENDVER

Description

EPW User Acc Pend Ver

Active

☒

Gauge Chart Parameters

Minimum Value *

0

Maximum Value *

100

Hide when no results

☒

Range One Value *

5

Range Two Value *

10

Range Three Value *

20

Range One Label

Range Two Label

Getting Behind

Range Three Label

Get to it!

Custom Result Description

[[username]] - [[givenname]] [[surname]]

ⓘ Right click to insert available tokens

Image 25

Add the chart to your Home page using Options - Form Preferences or contact your IT Team if that isn't available.
Images 26 and 27 show the results of the Chart Parameters selected.

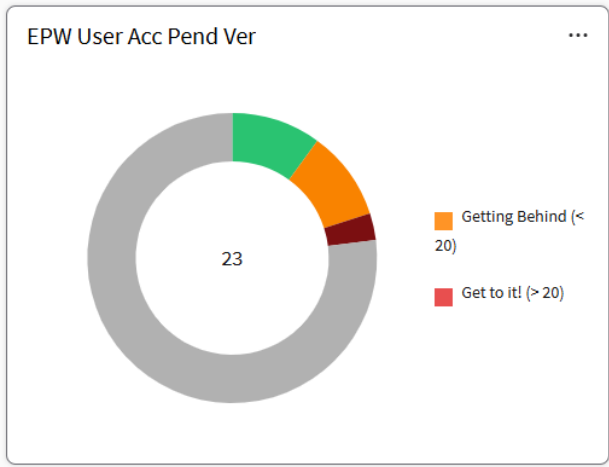


Image 26

EPW User Acc Pend Ver	
BYRON - caroline lamb	
BERYL.SMITH - Beryl Smith	
BUILDER2 - Builder 2	
ARCHI - Architectural Drafting Service	
BUCKLER01 - B Aabb	
APPLESEEDINC - Appleseed Incorporated	
BEAR - Teddy Bear	
BIJAL - Patel	

Image 27

New User Registration Matching Examples

Name in Pathway and name in the Pre Auth Registration Process are an exact match for:

• Surname • E-mail address (Default Communication Type) • Default Address, but the Given Name field in Pathway has two names and only one is entered in the PARP.	A new name will be created in Pathway.
• E-mail address (Default Communication Type) • Default Address • Given Name (one or more names, or hyphenated name) But Surname is different.	A new name will be created in Pathway.
Either part of the Surname or Given Name have an apostrophe.	Registration will fail and will have to be completed manually in Pathway.
Where the Default e-mail Communication Type hasn't been used on the Pathway Name, instead another e-mail Communication Type has been used.	A new Name will be created in Pathway.
Where there are two Names that are an exact match, so duplicates. One has the Default e-mail Communication Type and the other has a non-default e-mail Communication Type.	The Name with the Default e-mail Communication Type will be selected for the registration.

NOTE: This function will only be available to sites who have the required authority. Contact your Account Manager if your site requires this new functionality.

Public Users Access

Case: UX Client	Work Item: 68248 ERS:
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RESTRICT PUBLIC USER ACCESS

Page Layout => System Menu will display a Display to Public checkbox, so that options like Application Enquiry can be disabled using the user interface, as previously this was only achievable via a database script.

The majority of the number IDs passed in the URL are now encrypted and additional checks have been put into place around the public user sessions.

Customer Service Fields

Case: CAMP CS1582807 UX Client	Work Item: 68567 ERS:
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DYNAMIC PAGES

When a Boolean field is changed to a Checkbox it will no longer generate an error.

ePathway Applications

VertiGIS Integration

Case:
UX Client

Work Item: 68371
ERS:

APPLICATION PRE-LODGE MENT

***** Authorised Function *****

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

The VertiGIS map integration can now be utilized for ePathway Application Pre-Lodgement. Three new configurations been introduced under Layout > Page Layout > Disclaimer to configure the VertiGIS map. Based on the Property Search Setup and VertiGIS map setup in System Settings along with Page set up, the GIS Tab with VertiGIS map can then be offered during Application Pre-Lodgement.

VertiGIS Map Relative Path	?app=a3dee2f383bf49149891cc433f677448&isEmbedded=true
VertiGIS Map Workflow Id	5d06d425-73c6-44f6-a80f-bf08204f1814
VertiGIS Map Portal Item	34ae3b9a940b406c95e148c009f4d2fb

NOTE: This function will only be available to sites who have the required authority. Contact your Account Manager if your site requires this new functionality.

Application Module VertiGIS Integration

Case:
UX Client

Work Item: 68547
ERS:

VERTIGIS INTEGRATION

***** Authorised Function *****

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

The process has been modified to improve the multiple properties search in ePathway.

NOTE: This function will only be available to sites who have the required authority. Contact your Account Manager if your site requires this new functionality.

ePathway General Enquiry

ePathway Property General Enquiry Parameters

Case:	Work Item: 66866
UX Client	ERS:

PROPERTY ENQUIRY PARAMETER

The System Menu >> System Administration >> ePathway >> General Enquiry Parameters >> Property Enquiry Parameters menu option has been updated to use Pathway UX user interface standards.

ePathway Applications General Enquiry Parameters

Case:	Work Item: 68068
UX Client	ERS:

GENERAL ENQUIRIES LIST MAINTENANCE

Form options will now be disabled when no List Code or Description have been provided.

Applications Enquiry Parameters/Licensing Enquiry Menu

Case: SYDN CS1664881	Work Item: 68653
UX Client	ERS:

GENERAL ENQUIRY FIELD MAINTENANCE

The assignment of the Enquiry Fields will now correctly add all the records so that the ePathway Page Layout will display the correct Column and Column Tree options within the drop-down.

Infringements

Bulk Maintenance

Case: IPSW CS0598217
UX Client

Work Item: 66263
ERS:

BULK MAINTENANCE

The Bulk Maintenance function in various modules of Pathway now functions correctly no matter what the current User Account My Account >> User Settings >> Option Badges setting is.

In addition to this the time it takes for the initial load of the available Bulk options has been improved.

Infringement Maintenance

Case: BALL CS1176360, BEND CS1432369,
KNOX CS1551293
UX Client

Work Item: 67294
ERS:

LETTERS MAINTENANCE

Previously when an infringement had over 500 characters in the Offence Details, an error may have been displayed when a letter was saved.

Infringement Maintenance

Case: IPSW CS1117591, GLAD CS0958008,
WTOR CS1525715
UX Client

Work Item: 67313
ERS:

NAMES MAINTENANCE

The Contact Status now displays the correct value.

Cycle Function Selection Interface

Case: ATA CS1393948
UX Client

Work Item: 67909
ERS:

COURT EXTRACT CONTROL

*** New Zealand only ***

The number in the Available control, under Records for Extract, took a long time to calculate, sometimes several minutes, depending on the number of records.

Infringement Entry/Maintenance

Case: ATA CS1525580
UX Client

Work Item: 68350
ERS:

INFRINGEMENT ENTRY/MAINTENANCE

*** New Zealand sites only ***

It is now possible to add and maintain an infringement with the same start and end date and start and end time. Previously, the error **End Time cannot be before Start Time.** may have been displayed despite the end time being after the start time.

Infringement Maintenance

Case:
UX Client

Work Item: 68368
ERS:

LETTERS MAINTENANCE

Previously, adding a new letter may have displayed an error, and Merge Type User Security did not restrict Letter Type selection by User Account authority.

Letters Maintenance now opens as expected, and Letter Types are restricted to authorised Merge Types.

Infringement Maintenance

Case: SALS CS1376883
UX Client

Work Item: 68489
ERS:

LETTERS MAINTENANCE

Previously, when an address had over 50 characters, an error may have been displayed when a letter was saved.

Infringement Maintenance

Case: MNSH CS1494855, KSTN CS1512650
UX Client

Work Item: 68703
ERS:

INTERNAL REVIEW REQUEST MAINTENANCE

*** Victorian sites only ***

The following changes have been made to Internal Review Request Maintenance:

- The message **Access Denied – Supplier-defined Activity Types have not been created or assigned** may have been incorrectly displayed and this may have occurred even after the Internal Review Activity Types had been assigned.
- The message **The Internal Review record is about to be saved with further editing of some data not possible. Do you want to correct any data before proceeding?** has been deemed unnecessary and has been removed.
- User Add/Change/Delete Security will now be correctly applied.

- Additional Information Requested records can now be deleted only if security to delete the Internal Review Request record has been assigned.
- The Letter button will now display letters on existing Additional Information Requests.
- Internal Review Grounds selection is now displayed in Type order.
- Internal Review Outcome/Decision selection is now displayed in Type order.
- The Requested Date can no longer be changed once the record has been saved.
- The Received Date can no longer be changed once a date has been entered and the record saved.

Infringement Maintenance

Case: MNSH CS1494855, KSTN CS1512650	Work Item: 68703
UX Client	ERS:

LETTERS MAINTENANCE

The following changes have been made to the Letters Maintenance:

- With Private Name Details in use, after saving a letter for a Request for Additional Information the form was returning to the Infringement Summary form instead of returning to the Internal Review Request Maintenance form.
- The message **No Names are attached to the selected Offence/s.** may have been incorrectly displayed. The message may have been displayed when no Letter Request Activity had been set up.

Plan Maintenance

Case: KSTN CS1683456, LATR CS1698830	Work Item: 69021
UX Client	ERS:

OFFENCE AND INSTALMENT MAINTENANCE

Previously, it was not possible to remove an Offence from an Instalment Plan when payments had already been made. The Save button remained greyed out when the Offence was removed.

Attorney General's Report

Case: FRNK CS0485489, KSTN CS0553558	Work Item: 60096
UX Client	ERS: 96418

ATTORNEY-GENERAL'S REPORT CONTROL

*** Victorian sites only ***

The Attorney General's Report has been updated to report on the following new Infringement Act items:

1. Court referrals by the agency:
 - a. A new Refer to Court check box, Image 1, has been added to Withdrawal Reason Parameter Maintenance. This will enable the report to identify infringements that have been referred to the Infringements Court. The Withdrawal Reason is selected when under the Withdraw Notice option menu, Images 2 and 3.

Withdrawal Reason Maintenance

Save

Undo

Homepage / Animal Infringements Parameters / Withdrawal Reason Maintenance

Infringement Type

AN - Animal Infringements

Withdrawal Reason (3 results)

+ Add

...

☐	Type	Description	Refer to Court	Active
☐	COURT	Refer to Court	☒	☒
☐	W1	Reason 1	☐	☒
☐	W2	Reason 2	☐	☒

Image 1

Animal Infringements Summary

Bulk

☆

Add Tag >

Infringement Details

Ticket

20001034

Offence Date

Monday, 20 July 2009 9:00:00 AM

Offence Type

Biting Animal/53(1)

Inspector

Freddie Silc

Status Code

Withdrawn

Balance

0.00

Pay By

27/07/2022

Next Action

27/07/2022

☐ Post Out

☐ Direct Prosecution

Current Contact

Offence Details

Animal Reference: 9

Registration Number: 5555-2006

Breed: GOLDEN RETRIEVER

Colour: GOLD & WHITE

Particulars: Desexed Female.

Also known as Lucy Lu.

Location Details

On Street: Abbotts Street, North Adelaide

Infringement History (28 results)

Date	Activity Code	Amount	Comments
15/12/2021	Letter Request		all merge fields
15/12/2021	Letter Request		all merge fields
15/12/2021	Letter Request		all merge fields

Correspondence Recvd Entry

Court Extract Adjustment

Create Instalment Plan

Customer Service 2

Delete Offence

Exemptions

Hold Offence

Infringement Data +

Internal Review Request +

Letters +

Names

Notes

PERIN Details (Victoria)

Print

References

Registers

Returned Cheques

Set Cashier Warning

Transaction Entry

Unservd Letters

Withdraw Notice

Image 2

Withdraw Notice

Animal Infringements Summary / Withdraw Notice

Offence Details

Ticket Number

20001034

Offence Date

20/07/2009

Description

Biting Animal/53(1)

Withdrawal Details

Date *

23/07/2026

Withdrawal Reason *

COURT - Refer to Court

Image 3

b. Attorney General's Report has a new section called Court Referrals - Under the Infringements Act, Image 4.

Court Referrals - Animal Infringements Under the Infringements Act	1
--	---

Image 4

Infor Public Sector

4 August, 2026

Page 53

- c. The count for Court Referrals - Under the Infringements Act has two parts:
- Count of Internal Review Requests, within the reporting period, with an Internal Review Decision that has Category for Attorney-General's Report set to Refer to Court, Image 6. This is existing functionality under Infringements >> Infringement Parameters >> Infringement Type Parameters >> <Infringement Type> - Internal Review Decision, Image 5.

Image 5

Image 6

- Count of Infringement Withdrawal Notices, within the reporting period, that have a Withdrawal Reason with Refer to Court checked ON, as shown in Images 1 -3.
2. The number of Internal Review Requests where Additional Information has been requested:
- Attorney General's Report has a new section called Internal Reviews - Additional Info Requested, Image 7.

Internal Reviews - Animal Infringements Additional Info Requested	8
--	---

Image 7

- b. Count for Internal Reviews - Additional Info Requests that have a Requested Date within the reporting period, Image 8.

← Internal Review Request Maintenance

Animal Infringements Summary / Internal Review Request Maintenance

Offence Details

Ticket

20001034

Offence Date

20/07/2009

Date and Grounds of Review

Date

27/07/2022

Grounds

CON - Contrary to Law

Additional Information

Additional Information Request (1 result)

Requested	Details
≡ d/MM/yyyy	[A]
27/07/2022	

Image 8

- 2. Payment plans for bodies corporate:
 - a. A new Body Corporate check box has been added to Instalment Payment Plan Entry and Maintenance, Image 2.

← Instalment Payment Plan Maintenance

Payment Plan Details

Instalment Plan

790

Category

OTH - Other

Status

IPCRE - Plan Created

Eligibility

Mandatory

Contact Details

Current Contact

☐ Body Corporate

Image 2

Attorney General’s Report changes for Payment Plans

Old Section	New Sections
Payment Plans Offered	- Payment Plans Offered - Natural person - Payment Plans Offered - Body corporate. NOTE: Payment Plans are recorded as Offered when the Plan has been created but no payment has been made. If a payment plan is both created and a payment has been made within the reporting period it would be counted as offered and commenced. Payment Plan Eligibility of Discretion or Mandatory will only appear in the report against Payment Plans Offered - Natural person.
Payment Plans Commenced	- Payment Plans Commenced - Natural person - Payment Plans Commenced - Body corporate. NOTE: Payment Plans are recorded as Commenced when a payment has been made. Payment Plan Type will only appear for Payment Plans Commenced. Payment Plan Types include: - Payment by instalments (Instalment in the report). - Extension of time to pay (Extension of Time in the report). - Extension of time to pay and Payment by instalments (Instalment and Extension in the report).
Payment Plans Defaulted	- Payment Plans Defaulted - Natural person and - Payment Plans Defaulted - Body corporate. NOTE: Payment Plans are recorded as Defaulted when Infringements >> Instalment Payment Plans >> Plan Payment Monitoring >> Defaulting of Commenced Plans.
n/a	Paid in full before qualifying for registration. NOTE: Payment Plans have a Completed status, Balance of zero and Receipts must have been entered.

The counts for each type of Payment Plan will be calculated as before, with these exceptions:

- Natural person will only include payment plans with the Body Corporate flag OFF.
- Body corporate counts will only include payment plans with the Body Corporate flag ON.
- Payment Plans Offered - Natural person will continue to be split into Mandatory and Discretionary.
- Payment Plans Offered - Body corporate will not be split into Mandatory and Discretionary.

Sample Attorney General's Report entries are shown in Images 3 and 4.

Infringement Activity	Infringement Category	Internal Review Ground	Internal Review Decision	Payment Plan Eligibility	Payment Plan Type	Count
Court Referrals - Under the Infringements Act	Animal Infringements					4
Infringements Issued	Animal Infringements					24
Infringements Issued	Application Infringements					6

Infringements Withdrawn	Animal Infringements			4
Infringements Withdrawn	Parking Infringements - V -			8
Image 3				
Internal Reviews - Additional Info Requested	Parking Infringements - V - TA			21
Internal Reviews Decided	Animal Infringements	Contrary to Law	Withdraw	2
Internal Reviews Decided	Parking Infringements - V - TA	Contrary to Law	Withdraw	1
Internal Reviews Decided	Parking Infringements - V - TA	Exceptional Circumstances	Confirm	2
Internal Reviews Decided	Parking Infringements - V - TA	Mistake of Identity	Official Warning	2
Internal Reviews Undecided	Animal Infringements	Contrary to Law		3
Internal Reviews Undecided	Animal Infringements	Person Unaware		1
Official Warnings Issued	Animal Infringements			2
Official Warnings Issued	Licensing Infringements			1
Official Warnings Withdrawn	Animal Infringements			2
Official Warnings Withdrawn	Licensing Infringements			1
Paid in full before qualifying for registration	Animal Infringements			70
Paid in full before qualifying for registration	Application Infringements			8
Payment Plans Commenced - Body corporate			Extension of Time	1
Payment Plans Commenced - Body corporate			Instalment	2
Payment Plans Commenced - Body corporate			Instalment and Extension	1
Payment Plans Commenced - Natural person			Instalment	17
Payment Plans Defaulted - Body corporate				4
Payment Plans Defaulted - Natural person				26
Payment Plans Offered - Body corporate				4
Payment Plans Offered - Natural person			Discretionary	1
Payment Plans Offered - Natural person			Mandatory	30

Image 4

Inspections

Licensing Parameters

Case: MNSH CS1033861, GEEL CS1107042 UX Client	Work Item: 64815 ERS:
---	--------------------------

DEPARTMENT OF HEALTH INSPECTION PARAMETER MAPPING MAINTENANCE
INSPECTION PARAMETER MAINTENANCE

The Licensing >> Licensing Parameters >> Inspection Parameters >> Dept. Health Parameters option has been updated to use Pathway UX user interface standards and the Dept. Health Parameters menu option is correctly available.

Also, the Inspection Parameter Maintenance menu options badge counts will now appear as expected.

Extract Type Maintenance

Case: MACK CS1406981 UX Client	Work Item: 68512 ERS:
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INSPECT EXTRACT FILTER

Previously, it was not possible to maintain the Additional Filter for Extract Type with Extract List Type INSPECT. An error was displayed when the swap-list Details button was selected.

Licensing

Licensing Parameters

Case: IPSW CS1087309, HILLS CS1117763, SHIL CS1348119 UX Client	Work Item: 67137 ERS:
---	--------------------------

OVERRIDING FEE ACCOUNTS MAINTENANCE

Previously, the validation of the Non-taxable Type field was incorrect. The Non-taxable Type is mandatory when tax is not being applied to the Fee.

Name and Address

Duplicate Address Component Maintenance

Case: IPSW CS0364879, SYDN CS1012992	Work Item: 64602
UX Client	ERS:

DUPLICATE ADDRESS COMPONENT MAINTENANCE

When opening the Name and Address Register >> Name and Address System Housekeeping >> Duplicate Address Component Maintenance menu option the initial load of the form now performs well no matter how many duplicate Street components there are.

External Web Service

Case:	Work Item: 66394
UX Client	ERS:

EXTERNAL NAME - COMMUNICATION TYPE USED FOR E-MAIL AND PHONE

Changes have been made to the following External Web Service methods to determine which Communication Type is used to store e-mail address and phone number communication records when creating an External Name:

- Lodgement method (for Applications and Licensing)
- CreateResponse method (for Applications and Licensing)
- CreateAnimal method (for Animal Registration)
- MakeBooking method (for Bookings Management).

The Communication Type is now based on Communication Type Usage configuration against e-mail and phone respectively (Name and Address Parameters -> Communication Type Parameters -> Type Usage). When a Role Type override exists against an e-mail or phone Communication Type Usage, for example, for LAP/0 (Applicant), the nominated override Communication Type will be respected first.

For phone, when Communication Type Usage configuration exists against Mobile, Business, Home or Fax respectively, the logic order to determine a Communication Type is as below:

- If the provided phone number is the most common mobile number like 0#### #### #### or 0##### e.g. for Australia and New Zealand, it will be stored against Mobile usage.
- Otherwise:
 - For personal name, the process will try to store the phone number against the first applicable Communication Type in the order of Communication Type Usage: Home, Mobile, Business, then Fax.
 - For company, the process will try to store the phone number against the first applicable Communication Type in the order of Communication Type Usage: Business, Fax, Mobile, then Home.

If there is no applicable Communication Type Usage configuration, the logic order to determine a Communication Type is as below:

- For e-mail address - Use the first applicable active Communication Type with description of e-mail or email.
- For phone - Use the first applicable active Communication Type with description of phone.

The SDK documentation has been updated to reflect these changes. Request SDK documents by creating a Concierge request.

EPATHWAY GENERAL ENQUIRY - RESPONSE EXTERNAL NAME

The Communication Type Usage configuration mentioned above is also applied to ePathway General Enquiry when user lodges a Response with External Names.

EPATHWAY APPLICATION/LICENSING/ANIMAL ENQUIRY - EXTERNAL NAME

Changes also have been made to the following ePathway Enquiry functionalities to check whether the nominated Communication Type for an e-mail or phone field is active:

- Lodge Application
- Lodge Licence
- New Animal Registration.

If the nominated Communication Type is inactive, then the Communication Type Usage configuration mentioned above is also applied to ePathway Application/Licensing/Animal Enquiry during External Name creation process.

Name Role Maintenance

Case: SYDN CS1020652
UX Client

Work Item: 66821
ERS:

NAME SUMMARY

Name and Address security settings can be implemented to limit a User account to only maintain Names with single Role Types, or to enable the maintenance of Names with multiple Roles Types. This prevents one business unit changing Name details that will affect other business units.

When a new Role is created, the usual process is to search for a name and select it. Rather than selecting the Name, it was possible to modify the Name. This modify before select incorrectly allowed Name details to be changed that affected Names with multiple Role Types when the User account only had access to modify Names with a single Role Type. The appropriate Name and Address security settings, when creating a new Role are now applied if modify is selected prior to select.

Name and Address Maintenance

Case: IPSW CS1073104, ADEL CS1576839
UX Client

Work Item: 67182
ERS:

OVERRIDING MAILING NAME AND ADDRESS SELECTION

The performance of the filter via Role Information in the Overriding Application Name and Address Details data-grid has been improved. Slower performance is still expected when there are huge numbers of roles on the Name but will be faster than it was previously. A warning message displaying the number of roles on the name has also been included.

APPLICATION ROLE MAINTENANCE

A total has been added to the Role Type Summary data-grid to enable the number of roles on a name to be seen.

NOTE: When the data-grid is limited to roles for a particular module the total only reflects the number of roles for that module not all the roles on the name.

DEFAULT ADDRESS MAINTENANCE

Where the Name has a huge number of role records, making a selection in the Application Name and Address Details data-grid, then using the Address Details button to add a new Overriding Mailing Address and saving it, has been improved.

External Data Validation

Case:
UX Client

Work Item: 67732
ERS:

*** Authorised Function ***

*** Australia only ***

NOTE: Changes have been developed for the Pathway UX client only.

INFORMATION DETAILS VALIDATION

New Authorised Function named Business Number Validation has been added to extend Pathway validation capabilities to the Name's Information Details. It is now possible to configure external data validation (EDV) products with product Validation Usage of Business Number Validation for Australia and associate this product to any Information Type, Image 1.

Application	Description	Expiry Date	Access Code	Active	Status
[A]	[A] Business Number Validation	d/MM/yyyy	[A]	☒	Authorised

Image 1

Access to the ABN Lookup web service provided by the Australian Business Register (ABR) is free of charge.

The configuration elements required are outlined below:

- System Administration >> Integration >> System Parameter Maintenance
- Name and Address Register >> Name and Address Parameters >> External Data Validation Product OR
System Administration >> Integration >> External Data Validation >> External Data Validation Product
- Name and Address Register >> Name and Address Parameters >> Information Type Parameters.

Integration's System Parameter Maintenance

Via menu System Administration >> Integration >> System Parameter Maintenance.

Use the new Use Information Details External Data Validation switch to enable / disable the external validation of the information details if required. This setting is disabled by default when the authorised function is first enabled.

Image 2 System Parameter Maintenance

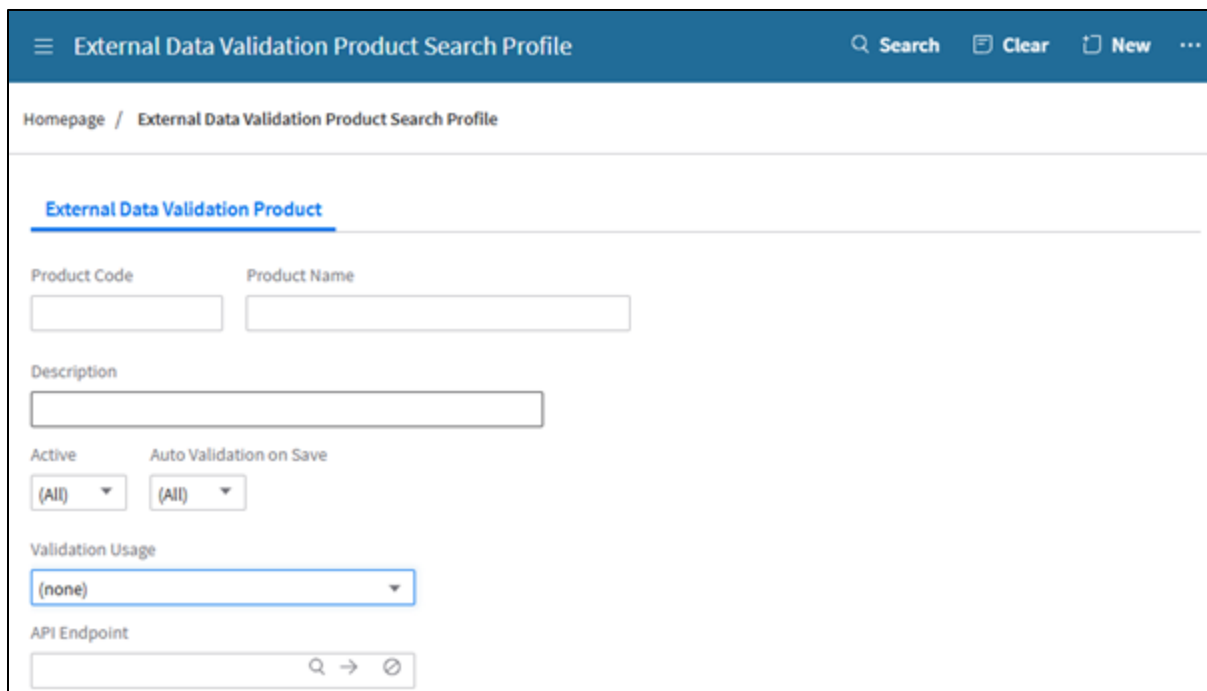
External Data Validation Product Search Profile

New Validation Usage option named Business Number Validation is available now.

Use External Data Validation Product Search Profile to search for the configured external data validation products and open maintenance.

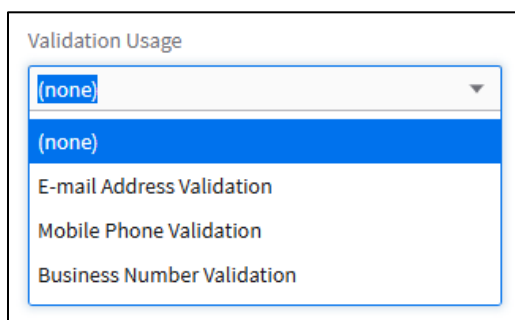
This can be accessed via two menu options:

- System Administration >> Integration >> External Data Validation >> External Data Validation Product
- Name and Address Register >> Name and Address Parameters >> External Data Validation Product.



The screenshot shows a web application interface for 'External Data Validation Product Search Profile'. The header bar is blue with a hamburger menu icon, the title 'External Data Validation Product Search Profile', and action buttons for 'Search', 'Clear', 'New', and a three-dot menu. Below the header, a breadcrumb trail reads 'Homepage / External Data Validation Product Search Profile'. The main content area is titled 'External Data Validation Product' and contains several input fields: 'Product Code' and 'Product Name' (text boxes), 'Description' (a larger text box), 'Active' (a dropdown menu currently showing '(All)'), 'Auto Validation on Save' (a dropdown menu currently showing '(All)'), 'Validation Usage' (a dropdown menu currently showing '(none)'), and 'API Endpoint' (a text box with search, back, and refresh icons). The 'Validation Usage' dropdown is highlighted with a blue border.

Image 3 External Data Validation Product Search Profile



This image is a close-up of the 'Validation Usage' dropdown menu. The dropdown is open, showing a list of options. The first option, '(none)', is highlighted with a blue background. Below it are three other options: 'E-mail Address Validation', 'Mobile Phone Validation', and 'Business Number Validation'. The dropdown has a small downward arrow icon on the right side of the header bar.

Image 4 Validation Usage allowed values

External Data Validation Product Maintenance

A new Validation Usage option, Business Number Validation, is now available. Selecting this option automatically sets the Validation Client value to Australian Business Number Lookup.

Use External Data Validation Product Maintenance to add, update, or delete external data validation products.

← External Data Validation Product Maintenance Save Undo Delete ☆

Product Code *

Product Name

Description

Validation Usage

Validation Client

API Endpoint *

☒ Active

☒ Auto Validation on Save

External Data Validation Product Configuration (0 results) + Add ...

	Parameter Name	Parameter Value
☐	[A]	[A]

No data available

Page 1 of 1 20 records per page ▼

Image 5 External Data Validation Product Maintenance

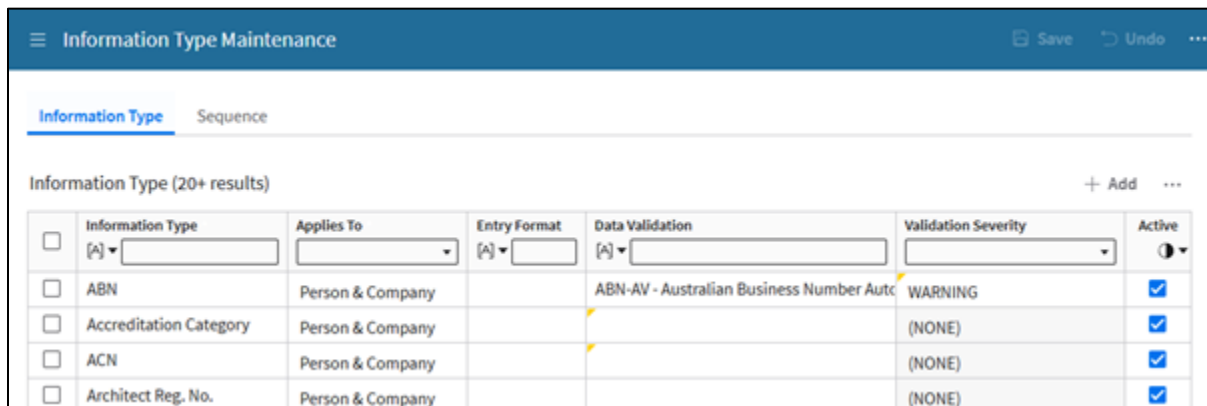
Name and Address Register - Information Type Maintenance

Via menu Name and Address Register >> Name and Address Parameters >> Information Type Parameters. New fields have been introduced to support configuring data validation for an Information Type when required. Use the new fields below to configure the data validation for an Information Type when required.

- **Data Validation:**
 - Used to link a Data Validation Product to the Information Type when validation is required.
 - Only External Data Validation Products with usage of Business Number Validation will be available for selection.
 - Default value: Null.
- **Validation Severity:**
 - Define whether errors returned by External Data Validation will prevent the form being saved.
 - Allowed Values:
 - Null – (none)
 - E – Error
 - W – Warning
 - Default Value: Null
 - This field becomes enabled and mandatory when a Data Validation value is selected; otherwise, it is disabled and not mandatory.
 - Clearing the Data Validation field will automatically reset the Validation Severity to Null.

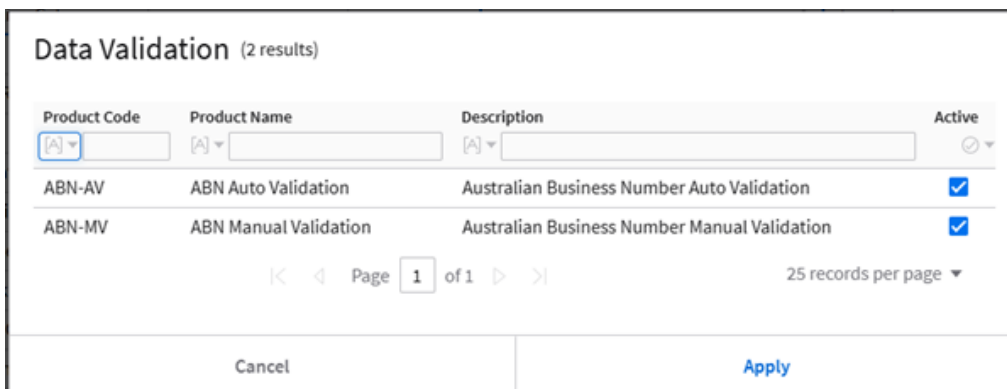
NOTE: Validation Severity is required because some returned errors do not necessarily make the value invalid. For example, when external system problems have prevented the validation request from completing.

NOTE: It is recommended that validation be set to Warning to ensure new Names and data changes can be saved as expected.



Information Type	Applies To	Entry Format	Data Validation	Validation Severity	Active
ABN	Person & Company		ABN-AV - Australian Business Number Auto	WARNING	☒
Accreditation Category	Person & Company			(NONE)	☒
ACN	Person & Company			(NONE)	☒
Architect Reg. No.	Person & Company			(NONE)	☒

Image 6



Product Code	Product Name	Description	Active
ABN-AV	ABN Auto Validation	Australian Business Number Auto Validation	☒
ABN-MV	ABN Manual Validation	Australian Business Number Manual Validation	☒

Page 1 of 1 | 25 records per page

Cancel Apply

Image 7

Personal Name Maintenance and Company Name Maintenance

Via menu Name and Address Register >> Name and Address Maintenance >> Name Search Profile > Select Name Type (Personal or Company) > Search.

Information Details data validation will be performed on the Personal Name Maintenance and Company Name Maintenance. Only Information Details records from an Information Type linked to an active External Data Validation Product can be validated. Based on the External Data Validation Product configurations, there are two supported validation methods:

- Manual Validation, using a Validate button in the data-grid header.
- Automatic Validation, which validates the data on Save.

Manual Validation

Select a single Information Details record and click the Validate button. The Validate button will only be enabled if the Validate on Save setting is not active for the External Data Validation Product linked to the Information Type of this Information Details record.

Automatic Validation

On Save, automatically validates the Description value using the linked External Data Validation Product. The Information Details record will be validated only when all conditions below are met: The Information Type of the Information Details record has an active External Data Validation Product configured. Either:

- The value of the Description field has changed, or
- The value of the Description field has never been validated before.

Tracking Validation Results

Two new fields have been introduced to the Information Details data-grid:

- Data Validation
- Validation Result.

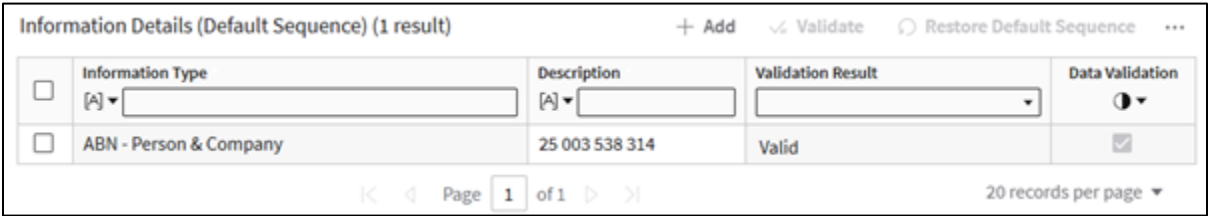


Image 8 Information Details

Data Validation Field

Used to determine whether an External Data Validation Product is configured for the Information Details record. When a Product is linked, the field's Tooltip, Image 9, displays key information about the Product such as: Code, Name, Active status, and the Auto Validation on Save flag.

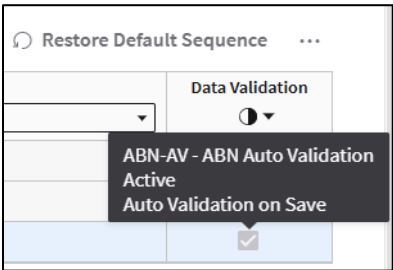


Image 9 Data Validation Field and Tooltip

Validation Result Field

Used to display previous validation results when available, in addition to the outcome of the latest manual or automatic validation performed by the user in the current session. The Validation Results allowed values are: Valid, Invalid and Undetermined. The field's Tooltip (Hover Text) displays more information such as the Entity Name, ABN, and the ABN status returned by the External Data Validation, Images 10, 11 and 12.

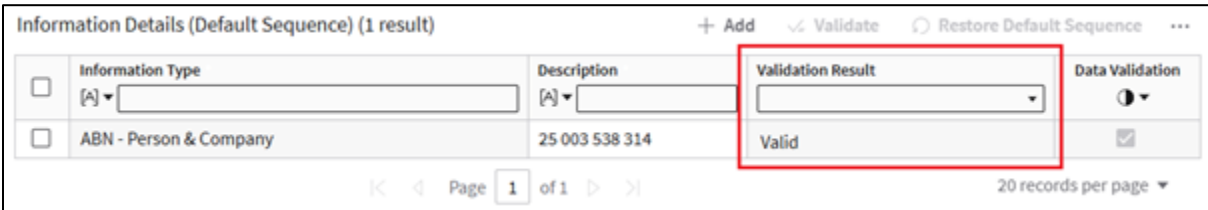


Image 10 Validation Result Field

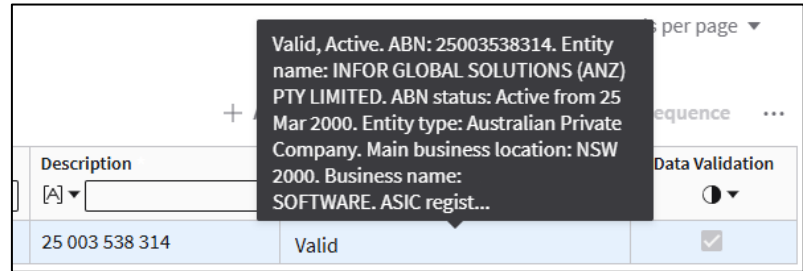


Image 11 Valid

The screenshot shows a form with a 'Description' field containing '[A]' and a 'Data Validation' section. A warning message is displayed: 'Warning - (85 003 538 314) Invalid, Search text is not a valid ABN or ACN'. Below the warning, the value '85 003 538 314' is shown as 'Invalid' with a checkmark icon.

Image 12 Invalid

Validation Process

When External Data Validation is performed in the current session, the validation outcome is assessed and mapped into one of the allowed Validation Results as follows:

Validation Result	Description
Valid	The value has passed validation; the field can be saved normally.
Invalid	The value has failed validation; in this case we consider the value of the Validation Severity setting of the Information Type as follows: Error Validation Severity: The response will be displayed as an error; the field cannot be saved until the data is corrected. Warning Validation Severity: The response will be displayed as a warning; the field can be saved as per normal. Null: Validation Severity is not set, handle it same as the Error Validation Severity. This should never happen if the field is configured correctly.
Undetermined	The returned response will be displayed as a warning; the field can be saved normally. Sometimes the provider is unable to conclusively verify or invalidate the value.

For Manual Validation the results will be displayed directly in the data-grid using validation icons, Image 13.

The screenshot shows a form with a 'Description' field containing '[A]' and a 'Validation Result' dropdown menu. The result is 'Invalid'. A warning message is displayed: 'Warning - (85 003 538 314) Invalid, Search text is not a valid ABN or ACN'. Below the warning, the value '85 003 538 314' is shown as 'Invalid' with a warning icon.

Image 13

For Auto Validate on Save, the results will be displayed in a message dialog and when no errors exist, the form will Save and reload, Image 14.

The screenshot shows a 'Pathway' dialog box with the following information:

External Data Validation

Information Details:

25 003 538 314 - Valid, Active. ABN: 25003538314. Entity name: SOLUTIONS (ANZ) PTY LIMITED. ABN status: Active from 25 Mar 2000. Entity type: Australian Private Company. Main business location: NSW 2000. Business name: . ASIC registration: 003538314. Goods and Services Tax (GST): Registered from 01 Jul 2000.

Changes will be saved.

Close

Image 14

Otherwise, when errors exist, closing the message will display the validation results directly in the data-grid using validation icons, Images 15, 16, and 17.

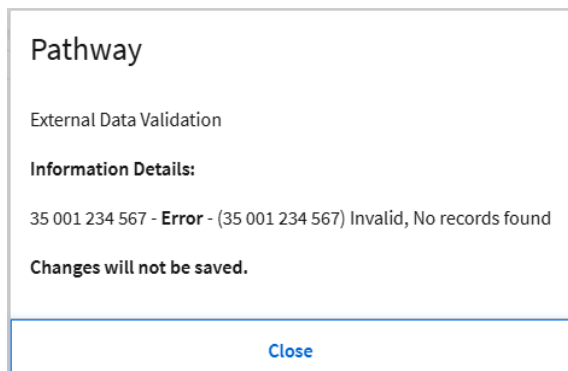


Image 15

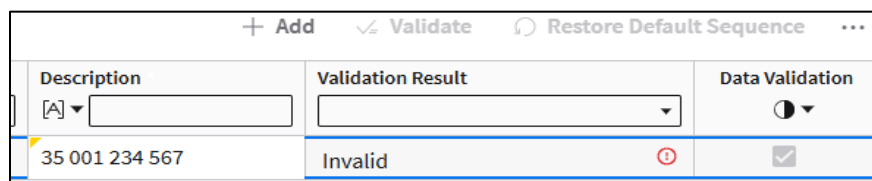


Image 16

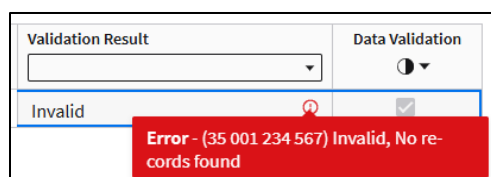


Image 17

NOTE: Existing Australian Business Number Information Type data has not been validated and will need to be reviewed.

AUSTRALIAN BUSINESS NUMBER (ABN) LOOKUP WEB SERVICE SETUP

Disclaimer

Infor is not responsible for the customer's ABN Lookup account, its configuration, its availability, or any limitations imposed by the Validation Service Provider. Each customer is responsible for obtaining and maintaining their own active account with the ABN Lookup Web Service, including any required registrations, subscriptions, licensing, or prepaid credit balances (where applicable). The authentication key (GUID) issued by the ABN Lookup service is unique to each customer and must be used only by that customer.

By uploading their authentication information into Pathway, the customer authorises Infor to use that key solely for the purpose of retrieving data from the ABN Lookup service on the customer's behalf. Pathway does not use this key for any write operations and does not use it for any purpose other than performing the configured validation requests.

The ABN Lookup service provides the following usage statement: The Registrar of the Australian Business Register (ABR) monitors the quality of the information available on this website and updates the information regularly. However, neither the Registrar of the ABR nor the Commonwealth guarantee that the information available through this service (including search results) is accurate, up to date, complete or accept any liability arising from the use of or reliance upon this site.

API Endpoint Maintenance

Via menu System Administration >> Integration >> API Endpoints >> API Endpoint Maintenance.

Configure new API Endpoint to be used to access the ABN Lookup web services as follows:

Endpoint Name (Example)	ABN Lookup web services
Icon	ABR - Australian Business Register
Description (Example)	ABN Lookup web services used in the ABN Information Types External Data Validation (EDV)
Endpoint URL	https://abr.business.gov.au/abrxmlsearch/AbrXmlSearch.aspx
Authentication Type	API Key
Request Header (Name)	AuthenticationGuid
Request Header (Value)	The GUID provided by the ABN Lookup web service in the registration e-mail.

Pathway will automatically send requests to the API method SearchByABNv202001 for ABN Validation.

API Endpoint Maintenance

Save Undo Delete ☆

Endpoint Name *
ABN Lookup web services

Icon *
ABR - Australian Business Register

Description *
ABN Lookup web services used in the ABN Information Types External Data Validation (EDV)

Characters left 410

Endpoint URL *
<https://abr.business.gov.au/abrxmlsearch/AbrXmlSearch.aspx>

Authentication Type
API Key

Request Header (1 result)

	Header Name	Header Value
☐	AuthenticationGuid	The GUID provided by the ABN Lookup web service in the registration email.

Page 1 of 1 20 records per page

Image 18 API Endpoint Maintenance

Australian Business Number Lookup Web Service Responses

The ABN Lookup web service returns a payload containing the original request and the search response. When the HTTP status code of the response is 200, the response body will contain one of the following:

If the request was unsuccessful:

- Exception
 - If the request was successful:
- Business entity.

Exception

Exception is an application error; The Exception response body contains an Exception Code and Description. For full list of exceptions refer to: <https://abr.business.gov.au/Documentation/Exceptions>

Business Entity

Pathway expects the ABN Lookup web service to return a business entity of type BusinessEntity202001. The following attributes are extracted from the response business entity if available and displayed in the validation message:

- ABN
- ABN Status

- Replaced By
- Replaces ABNs
- Entity type: Generally speaking, a business entity is either an individual or a non-individual. For example, (IND) Individual/Sole Trader, (PRV) Australian Private Company, (PUB) Australian Public Company, ...etc.
- Entity Name: The name that appears on all official documents or legal papers. The entity name may be different from the business name. For individuals, this is the Legal Name; for non-individuals, it is the Main Name.
- Main Business Location: State and Postcode.
- ASIC number (ACN or ARBN or ARSN or ARFN)
- Business Name: A business name is the name the business operates under. A person must register a business name if they run a business in Australia and are not trading under their own name.
- Goods and Services Tax (GST).

Except for the ABN and ABN Status, all attributes are optional.

- This is to handle suppressed ABN details.
- The only information available on ABN Lookup for suppressed ABNs is the ABN, ABN status and GST and charity tax concession registrations.

For more information refer to:

- <https://abr.business.gov.au/Documentation/WebServiceResponse>
- <https://abr.business.gov.au/Help/Glossary>
- <https://abr.business.gov.au/Documentation/DataDictionary>

Pathway will map the http (200) OK response to Pathway validation results as follows:

Pathway Validation Result	Response Body
Valid	Business Entity where the Entity Status Code is Active
Invalid	Business Entity where the Entity Status Code is Cancelled and Exceptions with the following Code and Description: • SEARCH - No records found. • WEBSERVICES - Search text is not a valid ABN or ACN. • WEBSERVICES - An ACN is invalid in ABN Search
Undetermined	All other Exceptions - Because not all exceptions are related to the ABN validity. For example: WEBSERVICES - System problems have prevented this request from completing.

For http errors such as (404) Page not found and (500) Internal server error, Pathway will throw an application-level exception that includes the details of the http error returned by this web service.

NOTE: New Zealand validation of Company Number Validation will be developed in a future release.

NOTE: This function will be available only to sites who have the required authority. Contact your Account Manager if your site requires this function.

Address Maintenance

Case: UX Client	Work Item: 68166 ERS:
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ADDRESS MAINTENANCE - EXPERIAN ADDRESS VALIDATION

When a direct match exists for the address during Save, the system now correctly saves the values of Address Prefixes that do not have validation enabled in the Address Template Matching Maintenance.

Address Maintenance

Case:	Work Item: 68287
UX Client	ERS:

ADDRESS MAINTENANCE - EXPERIAN ADDRESS VALIDATION

The Lookup Search has been updated to correctly populate the Search Profile fields.

DPID Product Parameters

Case: GLEN CS1512746	Work Item: 68517
UX Client	ERS:

ADDRESS TEMPLATE MATCHING MAINTENANCE
EXPERIAN MATCH PARAMETER MAINTENANCE
ADDRESS SEARCH PROFILE

ADDRESS MAINTENANCE
REBUILD FORMATTED ADDRESSES
ADDRESS REMOVAL CONTROL

Special characters will now be correctly displayed and Address Template Matching Maintenance will reliably open Experian Match Parameter Maintenance when these characters are present.

Name and Address Maintenance

Case: STHL CS1428159, BEND CS1458842, RRC CS1698606, BEND CS1749021	Work Item: 69060
UX and Smart Clients	ERS:

PAGE DETAILS

Only the first group of records were returned when the number of records went over the initial page.

Property Administration

Transfer of Ownership Maintenance

Case: FARN CS0056895, IPSW CS1079157 UX Client	Work Item: 57301 ERS:
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TRANSFER OF OWNERSHIP MAINTENANCE

Override addresses for new Owners will now be correctly selected.

Property Maintenance

Case: IPSW CS0912462 UX Client	Work Item: 66362 ERS:
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PROPERTY/PARCEL ZONE MAINTENANCE

Previously, when a Zone was selected, the Zone Code field incorrectly displayed the Zone Code, Description and the Standard flag. Now, only the Zone Code and Description are displayed.

Property Maintenance

Case: IPSW CS0986210, SYDC CS1422314 UX Client	Work Item: 66582 ERS:
---	--------------------------

PROPERTY/PARCEL ZONE MAINTENANCE

Previously, it was not possible to move the Primary flag from a historic Zone to a current Zone.

Also, when the first Zone is added, it will now automatically default to Primary.

Property Maintenance

Case: UX Client	Work Item: 68061 ERS:
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PROPERTY NAMES MAINTENANCE

Several changes have been made to cater for South Australian (SA) Electoral Roll legislation changes in relation to:

- The requirement to be able to enter Nominees for Companies and Owner/Occupier Groups, and
- The requirement to be able to enter a Head Lessee and have them extracted as an Owner if they are not an Occupier.

For additional details please refer to the Functional Specification which is available upon request.

The following new Name Role Types are now available:

- Head Lessee
- Head Lessee Nominee
- Voters Owner Group Nominee
- Voters Occupier Group Nominee.

If the Head Lessee Role Type or its Nominee Role Type is not required for your site, then the Head Lessee Role Type can be made inactive using Name Role Type Maintenance within Name and Address Register >> Name and Address Parameters >> Role Type Parameters.

For SA Electoral Roll sites, one or more Nominees can now be entered for a given Owner, Occupier, Head Lessee, Voters Owner Group or Voters Occupier Group, with the option of also entering a Nominee Application Received Date for a given Nominee.

Also, a correction has been made to prevent an error which occurred in the situation when a Property initially had no names present, then a name was added (without pressing Save) and then a nominee was added and then Save was pressed.

PROPERTY SEARCH PROFILE

For SA Electoral Roll sites, the Nominee option now also allows for searching Nominees by Head Lessee, Voters Owner Group and Voters Occupier Group. These Role Types are selected in the Advanced Options section of the Name Search Profile (Property Search), after the Nominee option has been chosen.

ELECTORAL ROLL REPORT

For SA Electoral Roll sites, the report now also allows selection of the follows new Role Types and their equivalent Nominee Role Types:

- Head Lessee
- Voters Owner Group
- Voters Occupier Group.

Where a Head Lessee or a Head Lessee Nominee is reported its Voting Entitlement value (field ENTITLEMENT on the reporting entity LRPPA40) will be set to HLS or HLSN respectively.

Also, a new Nominee Application Date (field NOMAPPPDATE on the reporting entity LRPPA40) has been added to report the Nominee Application Received Date for Nominees.

BULK PROPERTY NAMES MAINTENANCE

For SA Electoral Roll sites, this function now also caters for the bulk maintenance of Head Lessees and Head Lessee Nominees.

LETTER GENERATION

For SA Electoral Roll sites, this function now also caters for the sending of letters to Head Lessees and Head Lessee Nominees.

Also, two new Extract List Types have been created with their extract fields:

- Head Lessee (HEADLESSE) – Head Lessees:
 - Head_Lessee_Name
 - Head_Lessee_Address
 - Head_Lessee_Addr_1_Line
 - Reason_Code
 - Reason_Description.
- Head Lessee Nominee (HEADLESSENOM) – Head Lessee Nominees:
 - Head_Lessee_Nominee
 - Head_Lessee_Nom_Address
 - Head_Lessee_Nom_Name_Link
 - Reason_Code
 - Reason_Description
 - Application_Received_Date.

Also, the Nominee Application Received Date (Application_Received_Date) extract field is now available on the existing Owner Nominee (OWNERNOM) and Occupier (OCCNOM) Extract List Types.

Street Maintenance

Case: UX Client	Work Item: 68424 ERS:
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STREET MAINTENANCE

Street Maintenance now correctly applies the street case conversion rule nominated in the Property System Parameters.

UXWS GIS Integration

Case: SYDN CS1394351 UX Client	Work Item: 68448 ERS:
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UXWS GIS PRODUCT MAINTENANCE

New field Insert Property Status has been added for UXWS GIS integration. The field enables Property Status values to be nominated for automatic filtering of properties to the nominated status when inserted into Pathway via UXWS GIS integration. The available values of the new field are:

- (All)
- Current
- Current & Proposed
- Proposed
- Historic.

This status is applied automatically to any properties sent to Pathway for processing by the DISP command where there is no user interface to choose the status. The operation of the DISO command remains unchanged with the Property Status being available for the user to choose in the user interface. Refer to the UXWS SDK if required.

(All) is the default value of the new field. If you want to apply the restriction to the property status modify the UXWS* product parameter setting to nominate the required status. All available status values are provided for completeness, but it is expected if a restriction is applied that it would be Current or Current & Proposed.

Division Maintenance

Case: SYDN CS1187893 UX Client	Work Item: 68593 ERS:
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DIVISION MAINTENANCE

The appropriate error message will now display correctly when attempting to Accept a Division that would create orphans.

Division Maintenance

Case:
UX Client

Work Item: 68595
ERS:

DIVISION MAINTENANCE

The validation of the state of a Division that occurs when accepting a Division has been restored after having been unintentionally removed by a change made in sprint 2025.03. This validation prevents the Division from being accepted if it would create orphans in the database or is competing with another Division.

Transfer of Ownership Maintenance

Case: GLAD CS1216103
UX Client

Work Item: 68616
ERS:

TRANSFER OF OWNERSHIP MAINTENANCE

Workflow User Actions EDMSPUB, EDMSUPDATE, or PUBLISH will now be successfully executed in the Property Transfer Workflow.

Division Maintenance

Case:
UX Client

Work Item: 68652
ERS:

DIVISION COPY ATTRIBUTES MAINTENANCE

Clicking on the Copy or More button was not performing the function correctly.

Property Maintenance

Case: WTOR CS1197022
UX Client

Work Item: 67297
ERS:

DIRECT MATCH

Direct Match is now available on the Query and Land Use options.

Rates Accounting

Assessment Maintenance

Case: MNVL CS1139511
UX Client

Work Item: 67171
ERS:

GENERATE RATES NOTICE
GENERATE RATES NOTICE (NZ)

Previously, when a Rate Notice was generated, unassigned Rate Types were incorrectly included in the Notice Extract.

Also, the Document Print window should only appear when a Notice is being printed.

Fines Generation

Case: MNVL CS1054533, MNVL CS1431084
UX Client

Work Item: 68100
ERS:

FINE GENERATION CONTROL
PENDING FINE GENERATION CONTROL

Previously, when a Profile was selected, the Tracking details from the saved profile were not loaded.

Also, when Use Fine Calculation Defaults flag is set for multiple assessments, the popup Use Fine Calculation Defaults should not be displayed when a profile is selected.

Assessment Maintenance

Case:
UX Client

Work Item: 68327
ERS:

PROPERTY LINKS MAINTENANCE

Previously, it was possible to remove a Primary Property Location without selecting a new Location as the Primary. The message **A Primary Location must be selected for the Assessment** is now displayed if there is no Primary Location.

Instalments

Case: MNVL CS1512758, SHEP CS1535411,
WODO CS1604432, MNSH CS1609749, PLAY
CS1642823
UX Client

Work Item: 68812
ERS:

INSTALMENTS

A correction has been made to the way in which instalment amounts are built from the underlying transactions. Previously, the instalment amounts could be incorrect by a few cents or more. This problem would become apparent after the instalments for an assessment were either created or adjusted e.g. by a Fines/Interest Generation.

NOTE: This reverses the change made in work item 66389, released in Sprint 2025.04 for the spread of transaction amounts across instalments where an assessment had two or more transactions which:

- Were spread across the instalments and
- Had the same Rate Type and
- Were partially but not fully reversed.

This situation will be addressed in future Sprint.

NOTE: Bulk Instalment Maintenance function via menu Rates Accounting >> Housekeeping >> Bulk Instalment Maintenance, can be run over relevant Assessments to attempt to fix any incorrect instalment amounts.

Supplementary Rate Maintenance

Case: SHEP CS1506550
UX Client

Work Item: 68682
ERS:

SUPPLEMENTARY RATE TYPE MAINTENANCE

Modifications have been made to be able to use the Rate Type Actions of Replacing and Replaced which were previously missing.

NOTE: This functionality is only applicable for sites with Allow Date Effective for Rate Types turned off in the Supplementary Rates Parameters within the Rates System Parameters.

Transaction Type Maintenance

Case:
UX Client

Work Item: 69143
ERS:

TRANSACTION TYPE MAINTENANCE

Previously, it was not possible to maintain any Transaction Type when the Taxable flag was ON and the Non-taxable Type was set to (none) in the Rates System Parameter.

Receipting

Message Audit Enquiry

Case: DARE CS0676286, GEEL CS1345451, RRC CS1345583, MELV CS1397411 UX Client	Work Item: 64896 ERS:
---	--------------------------

MESSAGE QUEUE AUDIT ENQUIRY

Processing an XML Document for an ePathway Application Lodgement or License Entry was unexpectedly returning an error when attempting to process the corresponding Receipt.

Remittance Report

Case: IPSW CS1260480 UX Client	Work Item: 68468 ERS:
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REMITTANCE REPORT CONTROL

The automatic switching of the Use Defaults checkbox will now only happen when the Receipt Number and Receipt Date ranges are changed to be different to the default values prior to submitting the job.

Process External Receipts

Case: WODO CS1465339, LATR CS1481618, TWOM CS1545990, LAKE CS1579890, BALL CS1627303, SALS CS1633815, WAIK CS1736054 UX Client	Work Item: 68775 ERS:
--	--------------------------

PROCESS EXTERNAL RECEIPT CONTROL

Previously, when a Direct Debit batch of External Receipts was processed some of the Rates Accounting receipts could incorrectly be reported with the message Invalid Assessment Number. After this occurred, the same problem could also occur when using the External Receipt Import to import a batch of External Receipts.

Registers

Register Entry Maintenance

Case: COGC CS1698502
UX Client

Work Item: 69037
ERS:

ADD REGISTER ENTRY

Previously, when creating a new Register, it was not possible to link an Infringement to the Register. An error was displayed when an Infringement Type was selected.

Smart Mobile CityWatch

CityWatch

Case: MACK CS1054695
UX Client

Work Item: 67162
ERS:

CITYWATCH

Form validation now ensures the Communication Types and Service Date fields are properly validated and highlighted.

Smart Mobile Customer Service

Smart Mobile

Case:
UX Client

Work Item: 68234
ERS:

SMART MOBILE USERS

An additional administration page will contain a list of users who are able to logon to a smart mobile app. A user's account must now be added to this page so that they are able to logon to Smart Mobile Animal, Customer Service, or Inspections.

There are also additional Security Health Checks on the Health Check page to highlight if CityWatch has been configured in an insecure way e.g. credentials that may be easy to guess.

SPECIAL INSTRUCTIONS

Logon as an ePathway administrator and go to Configuration -> System Parameters on the advanced page there is an additional parameter SmartMobile.EnforceMobileUsers that can be turned off while any Smart Mobile Users are added to the new list that restricts the logons. Once all the users have been added to Configuration -> Mobile Users

Trade Waste

Data-grid

Case: MACK CS0654356, MACK CS0655006 UX Client	Work Item: 65704 ERS:
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DATA-GRID

The data-grid has been updated to correctly move to the next cell when the tab key is used.

Assessment Maintenance

Case: MACK CS1190622 UX Client	Work Item: 67269 ERS:
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ASSESSMENT SEARCH PROFILE

Previously, the Assessment Number field was disabled and it was not possible to search for an Assessment using the Assessment Number range when the User Account had enquiry access to Trade Waste, or the User Account had no permission to maintain Trade Waste Details.

Outstanding Balances Report

Case: MACK CS1595415 UX Client	Work Item: 68622 ERS:
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OUTSTANDING BALANCES REPORT CONTROL

Previously, the following problems occurred:

- This form incorrectly shared Profiles with the Rates version of the Outstanding Balances Report. For example, if a default Profile from Rates was applied and the report was submitted it could report only on Rates Assessments instead of Trade Waste Assessments.
- The ability to add a Recovery Group was incorrectly available instead of the ability to add an Activity.
- The Tracking Activities available for selection were Rates Activities instead of Trade Waste Activities.

Water Billing

Perform Water Billing Generation

Case: MACK CS0774762
UX Client

Work Item: 66165
ERS:

WATER BILLING GENERATION CONTROL

Previously, when a Profile was selected, the Transaction Date defaulted to today's date instead of the date from the profile.

Meter Reading Entry

Case: MACK CS0878160
UX Client

Work Item: 66246
ERS:

METER READING ENTRY

It should not be possible for an Actual reading date to be entered that is earlier than the Initial reading date. Now if this is attempted a message will be displayed **Date cannot be earlier than the Initial Reading Date**.

Meter Reading Entry

Case: MACK CS0645995
UX Client

Work Item: 66252
ERS:

METER READING ENTRY

Previously, when Readings To Consider was set to Readings within Cycle in the Water Billing System Parameter, it was not possible to search on the Billing Period when the Period Code was entered in the Billing Cycle field.

Meter Reading Entry

Case: MACK CS1092070, CENT CS1446946
UX Client

Work Item: 66966
ERS:

METER READING ENTRY

Previously, it was possible to adjust an Initial Reading date to a date later than other reads that are not Final Reads. Now if this is attempted the following message **Initial Reading cannot be added** is displayed.

Water Usage Variance Report

Case: MACK CS1073120
UX Client

Work Item: 66968
ERS:

WATER USAGE VARIANCE REPORT CONTROL

Previously, when a Profile was selected and the report was submitted, the error **A DTD could not be located** was displayed.

Hand Held Export Control

Case:
UX Client

Work Item: 67104
ERS:

HAND HELD EXPORT CONTROL

When a Profile is loaded, the assigned values in the Areas swap-list are now populated correctly.

Assessment Maintenance

Case:
UX Client

Work Item: 67781
ERS:

ASSESSMENT SUMMARY

It is now possible to access the Water Billing Assessment when the Document Management Product is not set in System Administration >> Integration >> System Parameter Maintenance.

Meter Reading Entry

Case: MACK CS1356672
UX Client

Work Item: 67846
ERS:

METER READING ENTRY

Previously, if a Final Reading for a Replaced Slave Meter was deleted then all Master/Slave Meter relationships for all Master/Slave Meters would be lost.

Water Billing Assessment Maintenance

Case:
UX Client

Work Item: 68652
ERS:

METER REMOVAL/REPLACEMENT/COPY MAINTENANCE

Saving the record will now correctly process all the required data.

Word Processing

Letter Extracts

Case: KNOX CS1109613
UX Client

Work Item: 65530
ERS:

TASKS - APPLICATION TASKS EXTRACT

Extract list Type TASKS - Application Tasks, will now display workflow tasks under the Additional Filters option.

Extract Type Maintenance

Case: MACK CS1245744
UX Client

Work Item: 67487
ERS:

QUESTIONNAIRE EXTRACT FILTER

Previously, it was not possible to maintain the Questionnaire Extract Filter for Customer Service Extract Type with Extract List Type INSPQUES.

Maintain Word Processor Details

Case: DUNE CS1435082
UX Client

Work Item: 68064
ERS:

SECURED PDF

When the Smart Client/UX Viewing Format is set to Secured PDF and a generated document is viewed, the PDF will be displayed in a new browser window rather than a new tab inside the primary window.

Microsoft Word Authentication

Case: BEND CS1490679, MELV CS1501118
UX Client

Work Item: 68601
ERS:

WORD AUTHENTICATION

The detection of MS Word has been improved to cover some additional signatures seen in recent MS Word versions. Pathway UX has also been altered so that additional signatures can be added via configuration.

SPECIAL INSTRUCTIONS

Cookies must be cleared from Windows so the change can take effect, otherwise issues may be seen when editing documents. Perform these steps on each client machine (laptop or PC) where Pathway is run:

1. Open Control Panel
2. Internet Options
3. Click on the Delete button under browser history
4. Check on Cookies and click on delete.

Workflow

Dynamic Workflow Builder

Case:
UX Client

Work Item: 68388
ERS:

EXTERNAL RULES OPTIONS MAINTENANCE

The parameter for EXTRULES - External Rules Workflow User Action parameters now displays the Available and Assigned labels correctly for Application Type assignment.