

Pathway RELEASE NOTES

Enhancements

3.10.012

The Infor logo, consisting of the word "infor" in a lowercase, sans-serif font, centered within a red square.

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Your suggestions and comments regarding this documentation are highly regarded. Please email or fax any suggestions to your Infor Public Sector office - lghelpdesk@infor.com.

SOUTH AUSTRALIA

PO Box 360
Goodwood, SA 5034
Tel: +61 8 8372 6111
Fax: +61 8 8372 6199
lghelpdesk@infor.com

NEW SOUTH WALES

Level 3,
40 Miller Street
North Sydney, NSW 2060
Tel: +61 2 9021 7100
Fax: +61 2 9021 7298

NEW ZEALAND

Infor Public Sector NZ
93 Grafton Road
PO Box 2733
Auckland, NZ
Tel: +64 9 309 1860
Fax: +64 9 356 1860

VICTORIA

Level 17, 357 Collins Street
Melbourne, VIC 3000
Tel: +61 3 8608 8500
Fax: +61 3 8608 8599

QUEENSLAND

Level 13, 50 Cavill Avenue
Surfers Paradise, QLD 4217
Tel: +61 7 5635 4344

Pathway Release 3.10.012

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Introduction

This document describes enhancements and new functionality made available in Release 3.1n of the Pathway software.

This Release Notes document is also available for viewing from the Release Notes menu option included in the Help Menu.

Included in this document are the following sections:

User Guides and Online Help

This includes an overview of how to access Pathway Help (both online and in printable format), as well as a listing of all the Modules included.

Modules

Each module that has undergone modifications is included in this documentation. The documentation is now contained as follows:

- Infor Pathway Release Notes 3.10.012 Enhancements.pdf
- Infor Pathway Release Notes 3.10.012 Fixes and Software Corrections.pdf
- Infor Pathway Release Notes Summary 3.10.012.xlsx

If there are no details under any of these headings for a particular module, then that module will be omitted entirely.

InforXtreme Incident Index

This includes a listing of the InforXtreme Incidents addressed in this release of software, in alphabetical order with their associated page number.

DRN Index

This includes a listing of the Development Requests (DRNs) addressed in this release of software, in numerical order with their associated page number.

KB Index

This includes a listing of the Knowledge Base Articles (KBs) addressed in this release of software, in numerical order with their associated page number.

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User Guides and Online Help

All Pathway modules are supported by on-line help text which is accessed by pressing the F1 key within any field on a form. In addition, help text for all modules is also available from the Contents option within the Help Menu. This can be accessed from any form within Pathway.

Complete User Guides based on the Help Text may also be printed in hard copy for each module. To access the PDF versions of the User Guides, the following steps should be performed:

- ❑ The User Guides are stored in PDF format and therefore require that Adobe Reader be available to access them.
- ❑ The User Guide can be viewed or printed, but cannot be modified.
- ❑ Check with your system administrator for instructions on where to find these documents on your system.

The User Guide documents are stored in the following directory path in the following format e.g. ACR.pdf:

e.g.
XXX \ hlp\ABK.pdf

ABK	(Bookings Management)	CSY	(System)
ACR	(Customer Service)	CTX	(Tax)
CAR	(Accounts Receivable)	CWF	(Workflow)
CAU	(Auditing)	CWP	(Word Processing)
CBT	(Batch Processing)	CWS	(WorkSmart)
CCL	(Calendar)	ESY	(ePathway)
CCP	(Customer Profile)	HowtoUse	(How To Use)
CDC	(PaperClip Attachments)	LAN	(Animals)
CEM	(e-mailing)	LAP	(Applications)
CFI	(General Ledger)	LCN	(Conditions)
CIF	(Core Interface)	LDR	(Debtors)
CIM	(InfoMart)	LER	(Electoral Roll)
CMN	(Menu System)	LIF	(Infringements)
CMO	(Memo)	LIN	(Inspections)
CNA	(Name and Address)	LLC	(Licensing)
COR	(Responsibility)	LPA	(Property Accounting)
CQY	(Query)	LRA	(Rates)
CRC	(Receipting)	LTW	(Trade Waste)
CRF	(References)	LVL	(Valuations)
CRG	(Registers)	LWB	(Water Billing)

Applications

Enhancements

Application Maintenance

InforXtreme Incident: COGC 11699243; SMART AND THICK CLIENT;	DRN: 31042	Fix: 03107239;
	KB:	

APPLICATION SUMMARY

An enhancement has been made to the Application Summary form to improve the retrieval of Related Applications and Licences.

ePathway System

Enhancements

ePathway HTML Email formats extended

InforXtreme Incident: COGC 11397918; SMART AND THICK CLIENT;	DRN: 30859 KB:	Fix:
--	-------------------	------

EPATHWAY HTML EMAIL FORMAT EXTENDED TO ADDITIONAL EMAIL OPTIONS

Being able to specify a HTML formatted email message has been extended to most areas of ePathway. This has now also been extended to the following:

- Multi-item Request Confirmation email (i.e. Shopping Cart)
- New User Registration confirmation email
- Account Disabled notification email (i.e. Too many login failures)

For each of the above only a simple text email could be created by using the assigned user defined Text messages in ePathway. This has now been changed to allow the email format to be chosen (i.e. Text or HTML, as is the case form other email definition forms) with the HTML code template to be defined and viewed. As with other HTML email definitions it is also necessary to include placeholder tags within the HTML so the system knows where to inject the various sections of system generated HTML and data.

This is all best illustrated in the following sections which show the definition screens and sample output.

SHOPPING CART EMAIL DEFINITION

At present the Shopping Cart email text is taken from "ShoppingCart.Email.Header" and "Email.Footer" module text. By default, this remains unchanged. However, we now have the option to override the header and footer text if a plain text email format is still preferred, or else we can choose to use HTML formatted emails in the same way we do for most other ePathway generated emails.

This is done as the Admin user via the following form:

Text

HTML or Text email selection is done here for the Shopping Cart.

* HTML email formatting requires ePathway to be running in Web Services communication mode

** Available Placeholders can be inserted into the HTML body simply by double-clicking the placeholder and dragging the highlighted text to the desired position in the HTML

Email Format

HTML

HTML Email

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD XHTML 1.0 Transitional //EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<meta content="text/html; charset=utf-8" http-equiv="Content-Type">
<meta name="viewport" content="width=320, target-densitydpi=device-dpi">
<style type="text/css">
/* Mobile-specific Styles */
@media only screen and (max-width: 660px) {
table[class=w0], td[class=w0] { width: 0 !important; }
table[class=w10], td[class=w10], img[class=w10] { width:10px !important; }
table[class=w15], td[class=w15], img[class=w15] { width:5px !important; }
table[class=w30], td[class=w30], img[class=w30] { width:10px !important; }
table[class=w60], td[class=w60], img[class=w60] { width:10px !important; }
table[class=w125], td[class=w125], img[class=w125] { width:80px !important; }
table[class=w130], td[class=w130], img[class=w130] { width:55px !important; }
table[class=w140], td[class=w140], img[class=w140] { width:90px !important; }
}
```

Available Placeholders:
FieldsPlaceholder
HeaderPlaceholder

AGLS Metadata Title Prefix

ADMIN >> Layout >> Page Layout >> ePathway Core >> Metadata Text

The Preview button can be used to show the result as rendered by the browser, but please note that not all email clients render HTML identically. Note also that the placeholder tags are replaced by the system generated HTML.



To give council additional control of the content and format for each different item in the Shopping Cart, each module can have their default template for each item changed to appear as they wish. These are each defined by module 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

Code	Default Text	User Text	Hover Text
ShoppingCart.EmailItemAnimal.Html	----- HeaderPlaceHolder LocationPlaceHolder ApplicantsPlaceHolder FieldsPlaceHolder	<input type="text"/>	<input type="text"/>
ShoppingCart.EmailItemApplication.Html	----- HeaderPlaceHolder LocationPlaceHolder ApplicantsPlaceHolder FieldsPlaceHolder AdditionalCostsPlaceHolder	<input type="text"/>	<input type="text"/>
ShoppingCart.EmailItemCertificate.Html	----- HeaderPlaceHolder TypeDetailsPlaceHolder FieldsPlaceHolder	<input type="text"/>	<input type="text"/>
ShoppingCart.EmailItemLicence.Html	----- HeaderPlaceHolder LocationPlaceHolder ApplicantsPlaceHolder FieldsPlaceHolder AdditionalCostsPlaceHolder	<input type="text"/>	<input type="text"/>

ADMIN >> Layout >> Text >> Emails

The default text for each module contains a simple divider consisting of a line of dashes and each of the possible place holders. Councils include their own formatting using the User Text override. Here they can choose to omit placeholders if desired and format the HTML however they please.

NEW USER CONFIRMATION AND ACCOUNT DISABLED EMAILS

The definition for the New User Confirmation and Account Disabled emails has been added to the existing New User Registration text form and the format of all three emails is controlled by the one selector. The existing New User Registration email definition part of the form remains unchanged but we now have the additional definitions for Registration Confirmation and Account Disabled complete with their own placeholder and Preview buttons as shown below.

Text

This page allows you to define text for the selected module/type.

- * If HTML email format is chosen then templates need to be defined for each of Registration, Confirmation and Disabling of an account separately below.
- ** Available Placeholders can be inserted into the HTML body simply by double-clicking the placeholder and dragging the highlighted text to the desired position in the HTML

User Registration Type New User Registration

Email Format

HTML

HTML Email - New User Registration

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD XHTML 1.0 Transitional //EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<meta content="text/html; charset=utf-8" http-equiv="Content-Type">
<meta name="viewport" content="width=320, target-densitydpi=device-dpi">
<style type="text/css">
/* Mobile-specific Styles */
@media only screen and (max-width: 660px) {
table[class=w0], td[class=w0] { width: 0 !important; }
table[class=w10], td[class=w10], img[class=w10] { width: 10px !important; }
table[class=w15], td[class=w15], img[class=w15] { width: 5px !important; }
table[class=w30], td[class=w30], img[class=w30] { width: 10px !important; }
table[class=w60], td[class=w60], img[class=w60] { width: 10px !important; }
table[class=w125], td[class=w125], img[class=w125] { width: 80px !important; }
table[class=w130], td[class=w130], img[class=w130] { width: 55px !important; }
table[class=w140], td[class=w140], img[class=w140] { width: 90px !important; }
}
```

Available Placeholders: FieldsPlaceHolder

Preview

HTML Email - Registration Confirmation

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD XHTML 1.0 Transitional //EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<meta content="text/html; charset=utf-8" http-equiv="Content-Type">
<meta name="viewport" content="width=320, target-densitydpi=device-dpi">
<style type="text/css">
/* Mobile-specific Styles */
@media only screen and (max-width: 660px) {
table[class=w0], td[class=w0] { width: 0 !important; }
table[class=w10], td[class=w10], img[class=w10] { width: 10px !important; }
table[class=w15], td[class=w15], img[class=w15] { width: 5px !important; }
table[class=w30], td[class=w30], img[class=w30] { width: 10px !important; }
table[class=w60], td[class=w60], img[class=w60] { width: 10px !important; }
table[class=w125], td[class=w125], img[class=w125] { width: 80px !important; }
table[class=w130], td[class=w130], img[class=w130] { width: 55px !important; }
table[class=w140], td[class=w140], img[class=w140] { width: 90px !important; }
}
```

Available Placeholders: FieldsPlaceHolder

Preview

HTML Email - Account disabled due to failed login attempts

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD XHTML 1.0 Transitional //EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<meta content="text/html; charset=utf-8" http-equiv="Content-Type">
<meta name="viewport" content="width=320, target-densitydpi=device-dpi">
<style type="text/css">
/* Mobile-specific Styles */
@media only screen and (max-width: 660px) {
table[class=w0], td[class=w0] { width: 0 !important; }
table[class=w10], td[class=w10], img[class=w10] { width: 10px !important; }
table[class=w15], td[class=w15], img[class=w15] { width: 5px !important; }
table[class=w30], td[class=w30], img[class=w30] { width: 10px !important; }
table[class=w60], td[class=w60], img[class=w60] { width: 10px !important; }
table[class=w125], td[class=w125], img[class=w125] { width: 80px !important; }
table[class=w130], td[class=w130], img[class=w130] { width: 55px !important; }
table[class=w140], td[class=w140], img[class=w140] { width: 90px !important; }
}
```

Available Placeholders: FieldsPlaceHolder

Preview

Confirmation Instructions

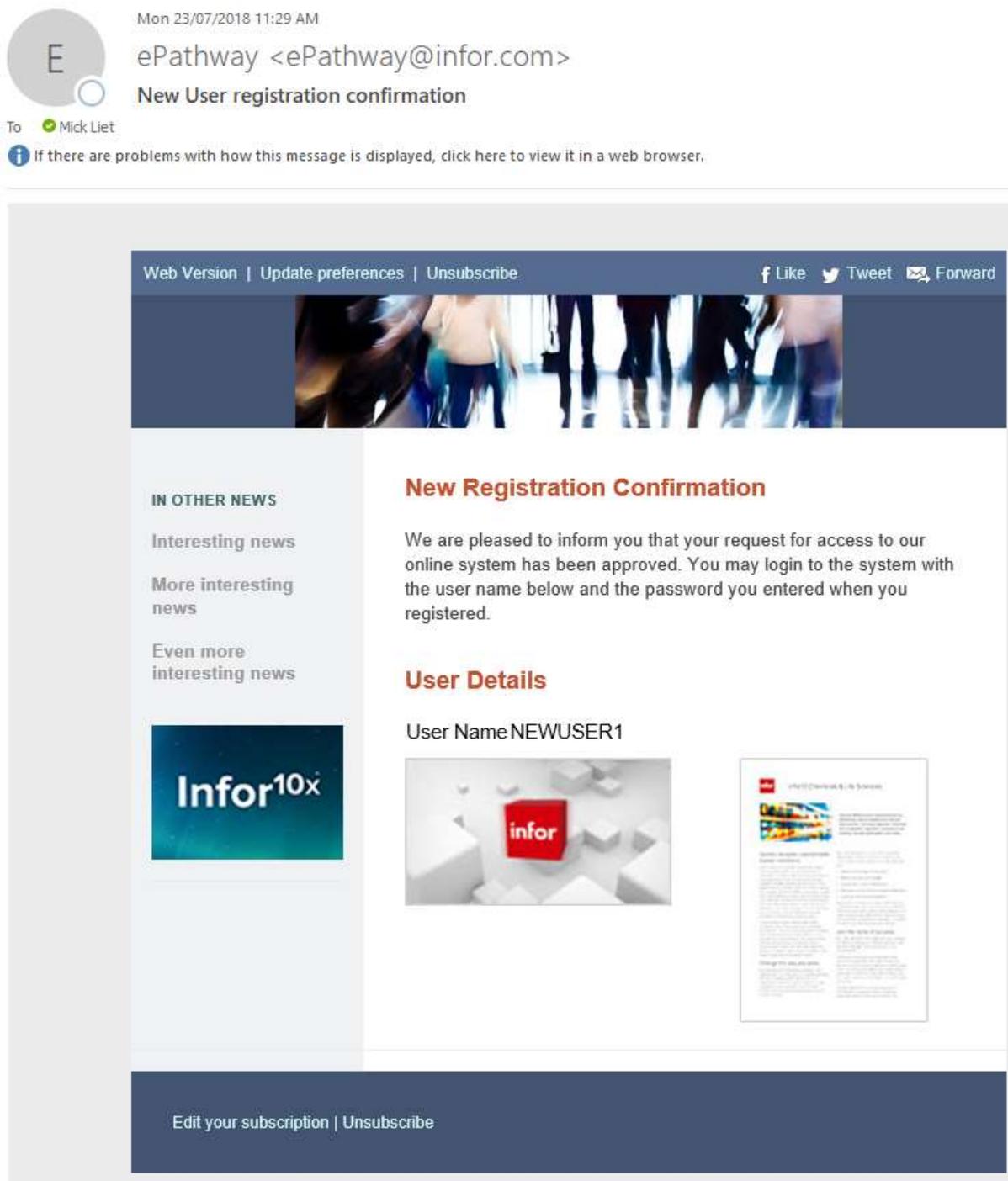
Submission Instructions

AGLS Metadata Title Prefix

Back Continue

ADMIN >> Layout >> Page Layout >> ePathway User Registrations >> NEWUSER >> Text

Where previously the Confirmation email content was defined as plain text by the "Registration.Email.UserConfirmationHeader" and "Email.Footer" module text and the Account Disabled header content was defined by "Login.Email.DisableUserHeader", when HTML format is now chosen, all content other than the generated field data and labels themselves (which for these emails is just the user label and user code) is defined by the HTML.



Example New User Confirmation email

APPENDIX A – CSS STYLE NOTES

As previously stated, please be aware that not all HTML Email clients render the resulting HTML the same. Outlook as a for instance does a lot of manipulation of the incoming HTML so that the output

when viewed as source HTML can appear almost unrecognisable, but the actual visual difference to the rendered result is often only very subtle.

Having said that, we all want our rendered results to be as controlled as possible and to aid with this each of ePathway's generated HTML that gets injected into the various placeholders is formatted as HTML Tables each with a class name to help councils control the final appearance.

The following CSS Styles and Table Id names are used where relevant (where the first table has # as blank and subsequent number from 1) when tabulated data is generated within each placeholder and may help when formatting the emails mentioned in this document and others generated by ePathway:

Class	Table	PlaceHolders in which they can be found
header_table	header_table#	HeaderPlaceholder
fields_table	fields_table#	FieldsPlaceholder
location_table	location_table#	LocationPlaceholder, TypeDetailsPlaceholder (Certificates)
applicants_table	applicants_table#	ApplicantsPlaceholder (Animals, Applications and Licences)
resource_table	resource_table#	FieldsPlaceholder (Bookings)
questions_table	questions_table#	FieldsPlaceholder (Customer Requests)
structure_table	structure_table#	FieldsPlaceholder (Customer Requests)
schedule_table	schedule_table#	FieldsPlaceholder (Direct Debits and Arrangements To Pay)

Logon Forgotten Password

InforXtreme Incident: COGC
11487305;

DRN: 30969

Fix:

KB:

MORE COMPLEX FORGOTTEN PASSWORD

The password generated in the event of a forgotten password in ePathway has been made more complex for security reasons.

ePathway Certificate Request

Enhancements

ePathway Certificate Request HTML Email

InforXtreme Incident: CGEY 10235359; COGC11512219; SMART AND THICK CLIENT; DRN: 30175 KB: 1890179; Fix:

EPATHWAY CERTIFICATE REQUEST HTML EMAIL FORMAT

The ePathway Certificate Requests module now allows for HTML Email definition to accompany the plain text option for confirmation emails sent to web users.

DEFINING THE HTML EMAIL LAYOUT

To cater for HTML template definition the ePathway Certificate Request Page Layout form for Certificate Classes now includes a “Text” option so that the email template can be defined at the class level as shown below. Previously, with the plain text model, the email text was only definable at the Type level and the resulting text was consolidated into an email, but in order to have a single template we now allow the main email definition to be done for the Class. The Type level definition is still retained and is injected into the main class template.

Certificate Classes

This page allows you to maintain the Dynamic Layout for Certificate Classes. Selecting the link will navigate to the Types for the Class.
Function: ePathway Certificate Request

Seq.	Code	Description	Instructions	Agreement	Text	Page Sections
1	EPACERT	ePathway Certificate Request				

Cancel Update

ePathway Certificates >> Class >> Text

The Email format can then be chosen. Once the HTML format is chosen, the HTML can then be defined for the email template with the 3 place holder tags being used to specify where within the template the header, field and type data is to be placed.

Text

This page allows you to define email text for the class.
Further definition can be done at the Type level which will be injected into the Locations placeholder.

* HTML email formatting requires ePathway to be running in Web Services communication mode

** Available Placeholders can be inserted into the HTML body simply by double-clicking the placeholder and dragging the highlighted text to the desired position in the HTML

*** For the HTML email template, the TypeDetailsPlaceholder will be injected with the consolidated HTML defined for each Type at the Type level.

Email Format

HTML

HTML Email

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD XHTML 1.0 Transitional //EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<meta content="text/html; charset=utf-8" http-equiv="Content-Type">
<style type="text/css">
body { background-color: #ecec; margin: 0; padding: 0; }
img { outline: none; text-decoration: none; display: block;}
table td, table tr { border-collapse: collapse; border: 0px; padding: 3px 10px;}

table.header_table, table.fields_table, table.questions_table, table.location_table, table.structure_table {
padding: 2px 10px;
margin-top: 10px;
margin-bottom: 10px;
}
table.header_table td:first-child, table.fields_table td:first-child, table.questions_table td:first-child, table.structure
font-weight: bold;

```

Available Placeholders:
FieldsPlaceholder
HeaderPlaceholder
TypeDetailsPlaceholder

Preview

Back

Continue

ePathway Certificates >> Class >> Text

This particular example template appears as follows when using the Preview button.



For each Certificate Type, the template for the location details should then be defined as this is what is injected into the TypeDetailsPlaceHolder above. Note how the Email Format field cannot be changed on the Type level form as it is governed by the Class level selection made previously.

Text

This page allows you to define text for the selected type.

* HTML or Text email selection is done at the class level and cannot be changed here.

** Available Placeholders can be inserted into the HTML body simply by double-clicking the placeholder and dragging the highlighted text to the desired position in the HTML

*** IMPORTANT: HTML defined here is not for the entire email template - only for the Type details.

This will then be injected into the TypeDetailsPlaceHolder within the HTML email template defined at the class level.

[Certificate Class](#) ePathway Certificate Request
[Certificate Request Type](#) Parcel Conditions Certificate

Email Format

HTML

HTML Email

```
<div align="left"><h4>Parcel Conditions Certificate Locations</h4>
LocationPlaceholder<br><br>
</div>
```

Available Placeholders:
LocationPlaceholder

Confirmation Instructions

Submission Instructions

Page Layout >> ePathway Certificates >> Class >> Type >> Text

As mentioned on the form notes highlighted above, each Type processed will have the locations consolidated into this template, which is then consolidated with other certificate types the user selected and finally injected into the TypeDetailsPlaceHolder from the main HTML email definition on the certificate class.

The following example may help better illustrate the result using the template setup shown above.

Enter Certificate Details

Select Certificate Types for each location and enter other details as prompted. The checkboxes below each Certificate Type indicate the level at which the Certificate will be processed. This is dependant on whether Certificates can be requested at property or parcel levels. Use the checkboxes to deselect a Certificate if it is not required at that level.

Address/Parcel	Legal Description	Parcel Conditions Certificate	Property Certificate
Across the Universe, Greenhill Road, EASTWOOD SA. 5126	Override Description (descr.lpaprop)		
Lot 333 RP 13		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Greenhill Road, EASTWOOD SA 5063		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Note : Some certificate type/s are restricted to what type of location they can be requested upon. * Denotes that the field is mandatory.

Certificate Details

Certificate Details

Attachment  No file chosen

Attachment Description

MB Money Field

Details

Override Postal Address

When the Certificate Request above is entered into the system with two locations each chosen for a specific certificate, the below email is produced using the example template defined earlier.



Certificate Request

Your Certificate Request has been submitted.

Header

Transaction Reference	CR-5706
Request Date	15/06/2018
Total Cost	\$60.00
Payment Method	Debtor Invoice

Fields

Certificate Details

Details:	Unit Test Certificate Request
Override Postal Address:	1 Frankfurter Parade

Type Details

Parcel Conditions Certificate Locations

Properties

Lot 333 RP 13, Across the Universe, Greenhill Road, EASTWOOD SA. 5126

Property Certificate Locations

Properties

Greenhill Road, EASTWOOD SA 5063

It should be noted that each section of data is created as a HTML Table and is assigned a style class name so that the formatting can be tailored for each.

The following CSS Styles and Table Id names are created (where the first table has # as blank and subsequent number from 1):

Class: header_table, Table: header_table#

Class: fields_table, Table: header_table#

Class: questions_table, Table: questions_table#
 Class: structure_table, Table: structure_table#
 Class: locations_table, Table: locations_table#

This then allows the class level HTML to provide styles for the appearance of the tables.

APPENDIX A – HTML OUTPUT FROM EXAMPLE

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD XHTML 1.0 Transitional //EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd"><html><head><title></title>
<meta content="text/html; charset=utf-8" http-equiv="Content-Type">
<style type="text/css">
body { background-color: #ececce; margin: 0; padding: 0; }
img { outline: none; text-decoration: none; display: block;}
table td, table tr { border-collapse: collapse; border: 0px; padding: 3px 10px;}

table.header_table, table.fields_table, table.questions_table, table.location_table,
table.structure_table {
padding: 2px 10px;
margin-top: 10px;
margin-bottom: 10px;
}
table.header_table td:first-child, table.fields_table td:first-child, table.questions_table td:first-child,
table.structure_table td:first-child {
font-weight: bold;
width: 200;
}
table.location_table th {
font-weight: bold;
text-align: left;
}
table.location_table td {
font-weight: bold;
padding: 2px 20px;
}

.article-title { font-size: 18px; line-height:24px; color: #c25130; font-weight:bold; margin-top:0px;
margin-bottom:18px; }

</style>
</head>

<body>

<br>

<p class="article-title" align="left"><singleline>Certificate Request</singleline></p>
<div class="article-content" align="left"><multiline>Your Certificate Request has been
submitted.</multiline></div><br><br>
<p class="article-title" align="left"><singleline>Header</singleline></p>
<table class="header_table" id="header_table">
<tr>
<td>Transaction Reference</td>
<td>CR-5706</td>
</tr>
<tr>
<td>Request Date</td>
<td>15/06/2018</td>
</tr>
```

```

<tr>
<td>Total Cost</td>
<td>$60.00</td>
</tr>
<tr>
<td><B>Buckler Test</B></td>
<td>Wump</td>
</tr>
<tr>
<td>Payment Method</td>
<td>Debtor Invoice</td>
</tr>
</table>
<br><br>
<p class="article-title" align="left"><singleline>Fields</singleline></p>
<br>Certificate Details<br><table class="fields_table" id="fields_table">
<tr>
<td>Details:</td>
<td>Unit Test Certificate Request</td>
</tr>
<tr>
<td>Override Postal Address:</td>
<td>1 Frankenfurter Parade</td>
</tr>
</table>
<br><br><br>
<p class="article-title" align="left"><singleline>Type Details</singleline></p>
<div align="left"><h4>Parcel Conditions Certificate Locations</h4><br><br>
<table class="location_table" id="location_table">
<tr>
<th>Properties</th>
</tr>
<tr>
<td>Lot 333 RP 13, Across the Universe, Greenhill Road, EASTWOOD SA. 5126</td>
</tr>
</table>
<br><br>
</div>

<div align="left"><h4>Property Certificate Locations</h4><br><br>
<table class="location_table" id="location_table">
<tr>
<th>Properties</th>
</tr>
<tr>
<td>Greenhill Road, EASTWOOD SA 5063</td>
</tr>
</table>
<br><br>
</div>

<br><br>
</div>

</body>
</html>

```

ePathway General Enquiry

Enhancements

ePathway General Enquiry Rates

InforXtreme Incident: COGC DRN: 30936 Fix: 03107237;
 11477294;
 SMART AND THICK CLIENT; KB:

RELEVANT DIRECT DEBIT FIELDS SHOWN AS "N/A"

The ePathway General Enquiry Rates forms have been modified for the display of the following Direct Debit fields which can be included within the page layout for a Direct Debit:

- Payment Amount: Will now show as "n/a" where the Direct Debit type is Due Date
- Total Payments: Will now show as "n/a" where the Direct Debit type is Due Date
- Last Due: This date will now show as blank where the Direct Debit type is Due Date
- Total Due: Will now show the Outstanding amount for Periodic Direct Debits and the Pending Amount for Due Date direct debits.

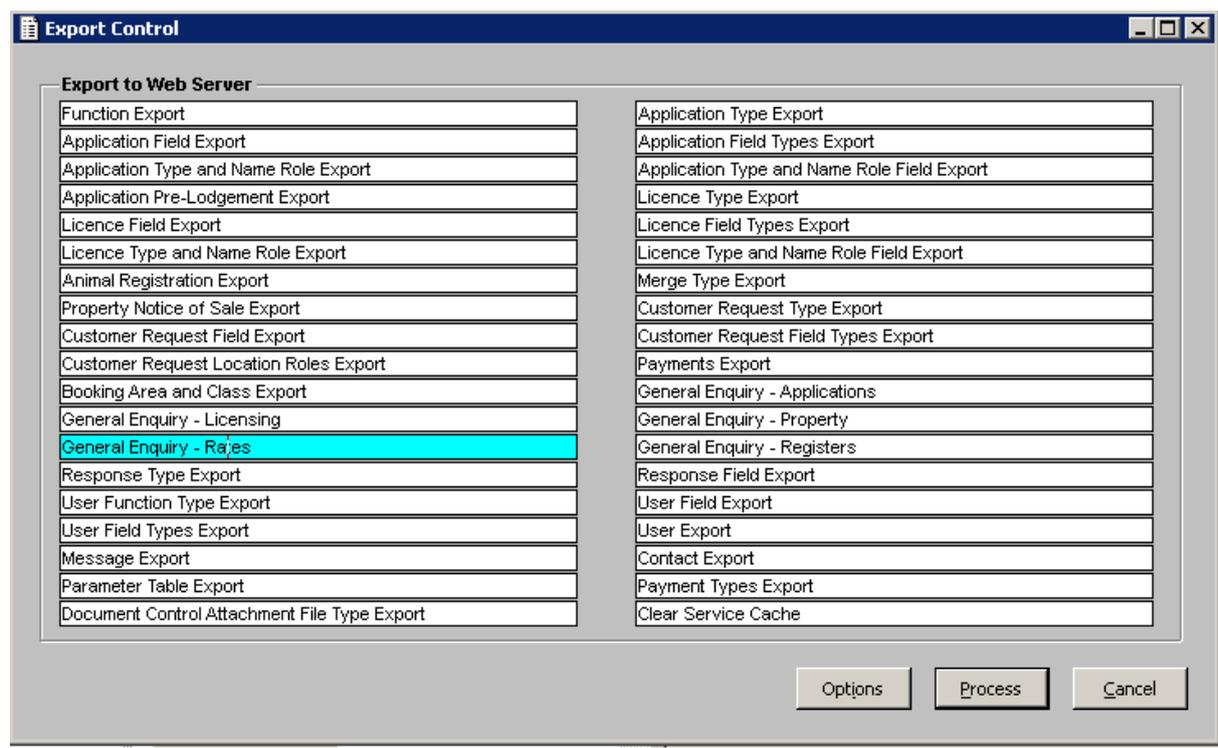
E.g.

Direct Debits

Start Date	Direct Debit Type	Schedule Type	Frequency	Payment Amount Last	Total Due Debit	Total Payments
28/06/2018	Rates Due Date Fixed Direct Debit (Online)	n/a	n/a	n/a	\$3,577.41	n/a

POST UPGRADE REQUIRED ACTIONS

This enhancement requires that the Web Export for "General Enquiry – Rates" is run.
 System Administration >> ePathway >> System Processing >> Web Server Export



Once the export has complete, please logon to ePathway as the Admin user and run:
ADMIN >> Layout >> Reload Layout Cache

ePathway General Enquiry Rates

InforXtreme Incident: COGC DRN: 30962 Fix: 03107219; 03107237;
11544826;
SMART AND THICK CLIENT; KB:

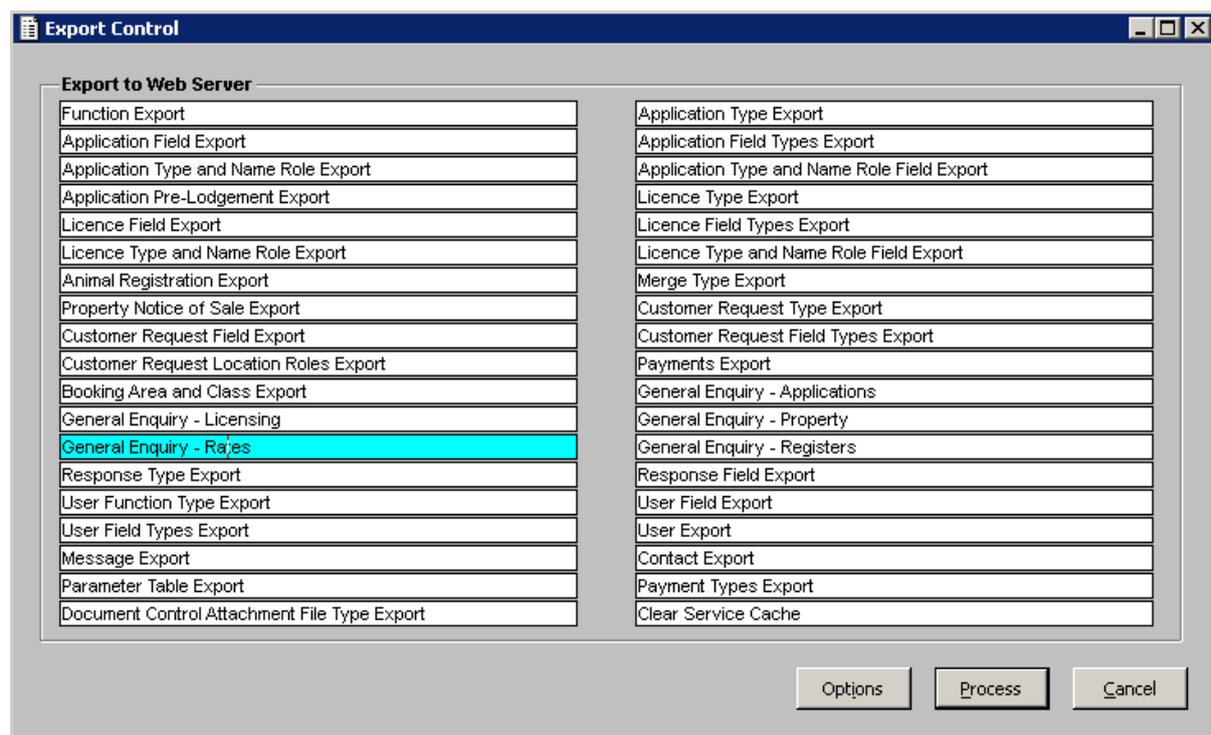
ONLINE DIRECT DEBIT AND ARRANGEMENTS TO PAY ENTRY CHANGES

The Direct Debit forms now show the Pending Discount, Pending Balance and Discount Due Date for an assessment if there is a non-zero Pending Discount value and the Direct Debit is Due Date based (i.e. Not Periodic/Scheduled).

Note that there is no change to the actual calculations, so for entering Periodic/Scheduled Direct Debits, the system will continue to calculate based upon the total Outstanding amount for the assessment.

POST UPGRADE REQUIRED ACTIONS

This enhancement requires that the Web Export for “General Enquiry – Rates” is run.
System Administration >> ePathway >> System Processing >> Web Server Export



PARAMETER CHANGES

As per other Direct Debit fields in ePathway, once the above export has completed it is possible to tailor the field labels for the new fields via the Admin user and the layout forms.

ADMIN >> Layout >> Page Layout >> ePathway Direct Debit Request >> DUE DATE >> Layout
ADMIN >> Layout >> Page Layout >> ePathway Direct Debit Request >> PERIODIC >> Layout

E.g.

Direct Debit Request Details Fields

This page shows you all the direct debit request details fields.

Sequence	Field Label	Width	Mandatory
10	Commencement Date	100	<input checked="" type="checkbox"/>
20	End Date	100	<input checked="" type="checkbox"/>
30	Schedule Type	100	<input checked="" type="checkbox"/>
40	Frequency	100	<input checked="" type="checkbox"/>
50	Amount of payment	100	<input checked="" type="checkbox"/>
60	BSB	250	<input checked="" type="checkbox"/>
70	Account Number	250	<input checked="" type="checkbox"/>
80	Account Name	250	<input checked="" type="checkbox"/>
90	Day Of Week	100	<input checked="" type="checkbox"/>
100	Day Of Month	40	<input checked="" type="checkbox"/>
110	End Date of Rating Period	100	<input checked="" type="checkbox"/>
120	Total Outstanding	100	<input checked="" type="checkbox"/>
130	Total Payments	100	<input checked="" type="checkbox"/>
140	Payment Type	100	<input checked="" type="checkbox"/>
150	Pending Balance	100	<input checked="" type="checkbox"/>
160	Pending Discount	100	<input checked="" type="checkbox"/>
170	Discount Due Date	100	<input checked="" type="checkbox"/>

Cancel

View the Result

Continue

GENERAL ENQUIRY RATES FORM CHANGES

The online Direct Debit entry forms now include the new Pending Discounts, Pending Balance and Discount Due Date fields if there is a Pending Discount amount for the assessment during entry of Due Date Direct Debits. Note also that the Payment Amount field is no longer displayed during entry for Due Date Direct Debits.

Below is an example Due Date direct debit entry where there is a pending discount.

Assessment

This is the Assessment for the Direct Debit.

Assessment Number	215
Ratepayer Names	M Liet
Formatted Property Address	BASEMENT 1 141-159 Rundle Mall, ADELAIDE SA 5001
Total Outstanding	\$5,578.11
Pending Discount	(\$50.70)
Pending Balance	\$5,527.41
Discount Due Date	27/06/2018
End Date of Rating Period	30/06/2018

Direct Debit on Due Date Request

Please enter the desired Direct Debit details. Once satisfied with the Amount, Start, End and Frequency of payment the system will determine the schedule. Note that for a Monthly frequency the day of month must be specified, whereas for Weekly and Fortnightly the desired day of week is required.

** Denotes that the field is mandatory.*

Schedule Type *

Due Date ▾

Commencement Date *

28/06/2018 📅

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These new fields are now included on the entry forms and within the confirmation emails for Due Date Direct Debits.

ePathway General Enquiry Rates Direct Debits

InforXtreme Incident: COGC	DRN: 30975	Fix: 03107237;
11565697;		
SMART CLIENT;	KB:	

CALCULATED PERIODIC DIRECT DEBIT MESSAGES WHEN PAYMENT AMOUNT IS NOT YET KNOWN

In the instance where an online Direct Debit is being lodged for a Calculated Periodic Direct Debit and the start date is within the last month/week of the rating period, it is possible that the ratepayer may enter a Day of Month/Week which no longer falls within the remaining valid days within the rating period.

E.g. If Period End is 30-Jun-2019 and the ratepayer decides to create a Calculated Periodic Direct Debit arrangement that starts on the 11th of June with Monthly payments to be made on the 5th of each month, then the system is unable to create a valid schedule of payments as the next 5th of the month falls in the following rating period.

In this case the system can now handle this scenario in one of two ways:

1. It can restrict entry to ensure the ratepayer is only allowed to enter in a Day of Month which still falls within the current rating period. In the above example, that would mean any Day of Month between 11 and 30 inclusive.
2. It can allow entry of a Day of Month outside the remaining days of the rating period, but when a ratepayer does so it will create a Direct Debit with no payments and a Direct Debit Recalculation (Rates Accounting >> Batch Processing Functions >> Direct Debit Recalculation) will need to be performed to populate the schedule amounts after the rates generation has taken place in the new rating period.

NOTE: The direct debit recalculation should be a standard part of post rates generation procedures for any councils allowing periodic calculated direct debits within Pathway whether they be created online or by a council officer.

For this to make sense to the ratepayer, two messages can be defined. The first is a short message to replace the payment amount value (E.g. Instead of showing \$0.00 it can instead show “(To Be Determined)”). The second is a more detailed note/warning to be displayed on the form.

By default, the system will use option 1. To instead use option 2, the DirectDebits.AmountToBeCalculated text needs to be defined with a non-blank user defined value:

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

Code	Default Text	User Text	Hover Text
Button.DirectDebitDetail	Assessment Details	<input type="text"/>	<input type="text"/>
DirectDebits.AmendButton	Amend Direct Debit	<input type="text"/>	<input type="text"/>
DirectDebits.AmendDetails	Amended Direct Debit Details	<input type="text"/>	<input type="text"/>
DirectDebits.AmendDirectDebitHeading	Amend Direct Debit	<input type="text"/>	<input type="text"/>
DirectDebits.AmendDirectDebitInstruct	Please enter the new values for the Direct Debit	<input type="text"/>	<input type="text"/>
DirectDebits.AmendTo	to	<input type="text"/>	<input type="text"/>
DirectDebits.AmountToBeCalculated	Only set if we want to allow user to set Day Of Month outside of remaining valid days. Eg. Amount To be Calculated	(To Be Determined)	<input type="text"/>
DirectDebits.AssessmentDetails	Assessment Details	<input type="text"/>	<input type="text"/>
DirectDebits.AssessmentDetailsHeading	Assessment	<input type="text"/>	<input type="text"/>

ADMIN >> Layout >> Text >> Direct Debit Requests >> DirectDebits.AmountToBeCalculated

The accompanying more detailed text message is defined by DirectDebits.NoPaymentsThisPeriodWarning on the same form, which can be reworded as required:

DirectDebits.NoPaymentsThisPeriodWarning	The criteria supplied has resulted in no payments calculated for this rating period. When the next round of Rates is determined, this amount will be calculated and scheduled according to the total amount outstanding and the schedule criteria specified.	<input type="text"/>	<input type="text"/>
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During entry, the form will then show these messages to alert the ratepayer that the payment amount for the Direct Debit is yet to be determined.

Assessment

This is the Assessment for the Direct Debit.

Assessment Number	215
Ratepayer Names	M Liet
Formatted Property Address	BASEMENT 1 141-159 Rundle Mall, ADELAIDE SA 5001
Total Balance	14495.40

Total Outstanding	\$20,073.51
End Date of Rating Period	30/06/2019

Periodic Direct Debit Request

Please enter the desired Direct Debit details. Once satisfied with the Amount, Start, End and Frequency of payment the system will determine the schedule. Note that for a Monthly frequency the day of month must be specified, whereas for Weekly and Fortnightly the desired day of week is required.

** Denotes that the field is mandatory.*

The criteria supplied has resulted in no payments calculated for this rating period. When the next round of Rates is determined, this amount will be calculated and scheduled according to the total amount outstanding and the schedule criteria specified.

Schedule Type	Periodic
Commencement Date	11/06/2019
Payment Type	Calculated
Frequency *	Monthly ▼
Day Of Month *	5 ▼
Amount of payment	(To Be Determined)

Bank Account Details

Please enter the bank account details for the Direct Debit below.

BSB *	<input type="text"/>
Account Number *	<input type="text"/>
Account Name *	<input type="text"/>

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These messages will also appear as appropriate during Amend, on the confirmation form and within the confirmation email.

Infringements

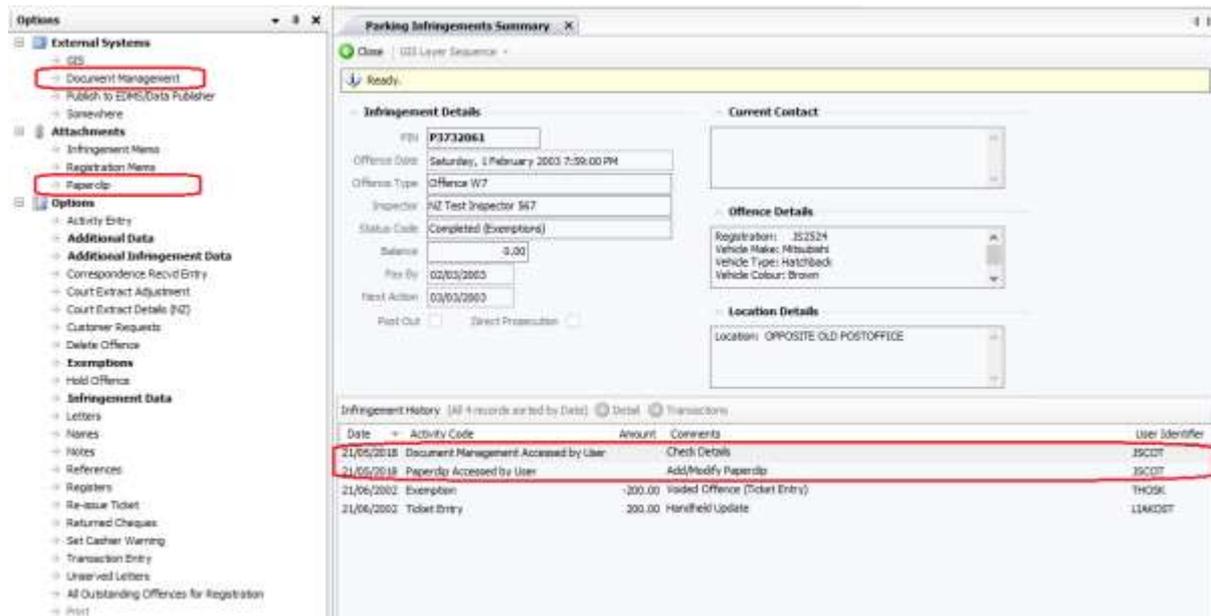
Enhancements

Infringement Maintenance

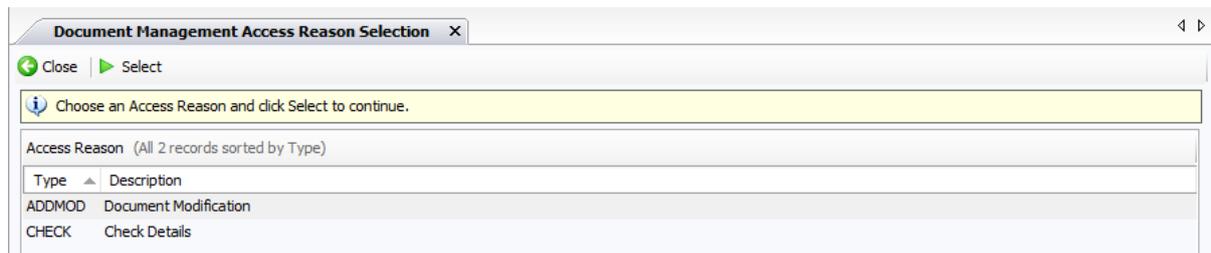
InforXtreme Incident: COGC DRN: 30536 Fix: 03107208; 03107229;
 10876985;
 SMART CLIENT; KB:

ACCESS REASON

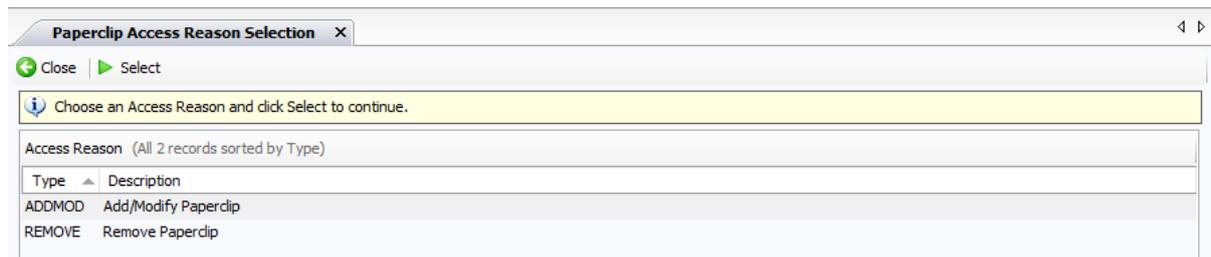
Infringement Maintenance has been enhanced to record within the Infringement History those users who access Document Management or Paperclip details.



When the Document Management option is selected on the Infringement Summary form it is possible to enforce the selection of a Document Management Access Reason before the options is displayed.



When the Paperclip option is selected on the Infringement Summary form it is possible to enforce the selection of a Paperclip Access Reason before the options is displayed.



This is the same functionality that was previously only available for Private Name Details.

Global Infringement Parameters

Global Infringement Parameter Maintenance

Cycle Functions & Reporting
Concurrent Infringement Type Processing

Access Reasons
Name Access Reason
Document Management Access Reason
Paperclip Access Reason

Extended Court Lodgement
Extended Court Lodgement Reason

OK Cancel

Two new options have been added to the Global Infringement Parameter Maintenance form to allow the maintenance of Document Management and Paperclip Access Reasons.

Document Management Access Reason Maintenance

Type	Description	Active
ADDMOD	Document Modification	<input checked="" type="checkbox"/>
CHECK	Check Details	<input checked="" type="checkbox"/>

Insert OK Cancel

Paperclip Access Reason Maintenance

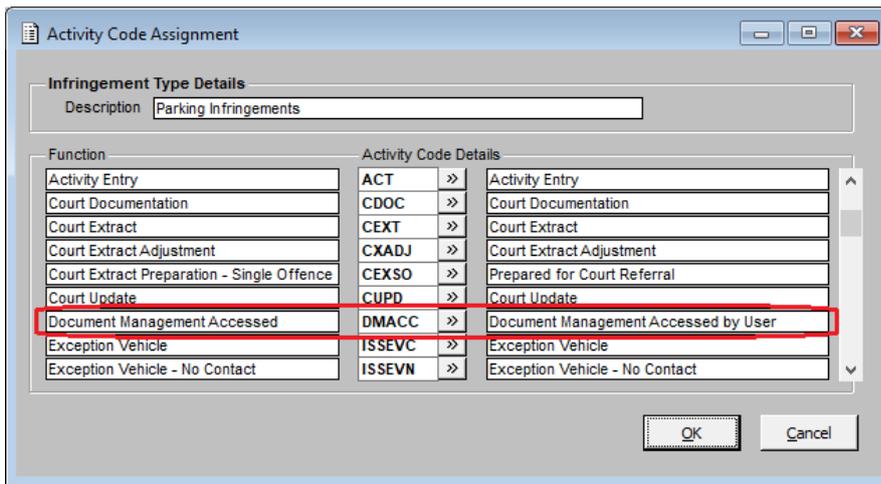
Type	Description	Active
ADDMOD	Add/Modify Paperclip	<input checked="" type="checkbox"/>
REMOVE	Remove Paperclip	<input checked="" type="checkbox"/>

Insert OK Cancel

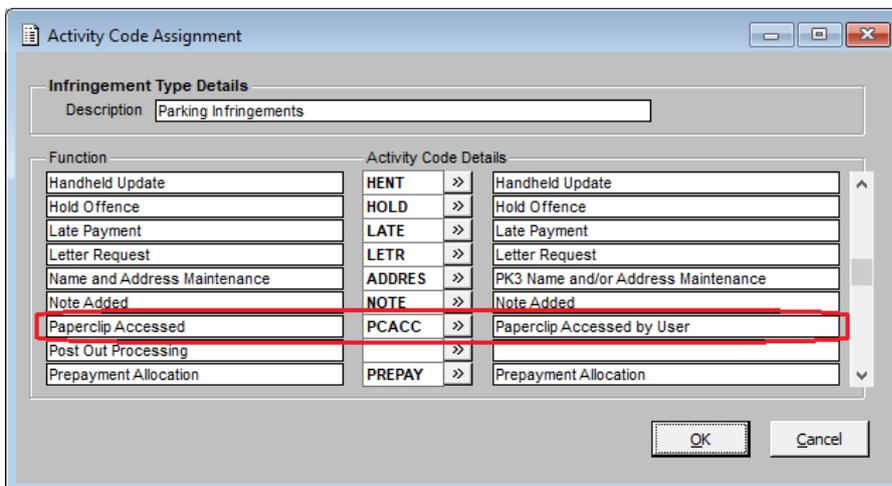
The Document Management and Paperclip Access Reasons are shared between all Infringement Types.

Infringement Type Parameters

To enforce the selection of a Document Management Access Reason before the option is displayed, an Activity Code must be selected against the Document *Management Accessed function* within the Activity Code parameter.



To enforce the selection of a Paperclip Access Reason before the option is displayed, an Activity Code must be selected against the *Paperclip Accessed* function within the Activity Code parameter.



Licensing

Enhancements

Licence Renewal

InforXtreme Incident: COGC 11077748; SMART AND THICK CLIENT;	DRN: 30648 KB:	Fix: 03107233;
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LICENCE RENEWAL REPORT

The Licence Renewal Report has been enhanced to create a zero licence fee when the calculated licence fee is zero and the Licence Type parameter 'Load Zero Fees' is set.

Licensing Maintenance

InforXtreme Incident: COGC 11699243; SMART AND THICK CLIENT;	DRN: 31042 KB:	Fix: 03107239;
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LICENSING SUMMARY

An enhancement has been made to the Licensing Summary form to improve the retrieval of Related Applications and Licences.

Rates Accounting

Enhancements

Differential Rates functionality

InforXtreme Incident: COGC 11379611; SMART AND THICK CLIENT;	DRN: 30831 KB:	Fix: 03107198; 03107235;
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** Gold Coast Council Only **

Differential Rate Type Verification Control

Previously there could a problem when using the Differential Rate Type Verification function, in that a Differential Rate Type could not be assigned to an Assessment as either the Assessment's Orientation or the Occupancy Status attribute had no value present.

Enhancements have been made so that when determining the Differential Rate Type that should be used for an Assessment, this function will cater for when either of these attributes have no value. If an Assessment's Orientation or Occupancy Status attribute has no value, then it will be assumed that its value is set as '(none)', therefore, a Differential Rate Type should be able to be determined.

Bulk Assessment Maintenance Generation Control

Previously there was a problem when using the Update Differential Rates Attributes operation if not all the attributes were to be updated to the Assessments. This could result in one or more of the Differential Rates attributes being updated to a Null value. For example, if Assessments were to only have their Differential Rate Code updated, meaning that the Orientation and the Occupancy Status fields were left empty on this form, when the Update was run, this would result in the Assessments having their Orientation and the Occupancy Status fields set to a Null value. This could then cause a problem when subsequent functions tried to determine the Differential Rate Type that was applicable to the Assessment's Differential Rates attributes.

To overcome this issue, the Update Differential Rates Attributes operation has been enhanced by adding Update checkboxes for each attribute that can be updated. The form now looks as shown below which allows the user to nominate which attributes are to be updated to the Assessments.

To have an attribute updated to the Assessments, check the Update checkbox next to that attribute and nominate the value that is to be updated as well as the Date Effective that is to be used. To not have an attribute updated to the Assessments, leave the checkbox unchecked.

Apportioning across Rate Types to update GL

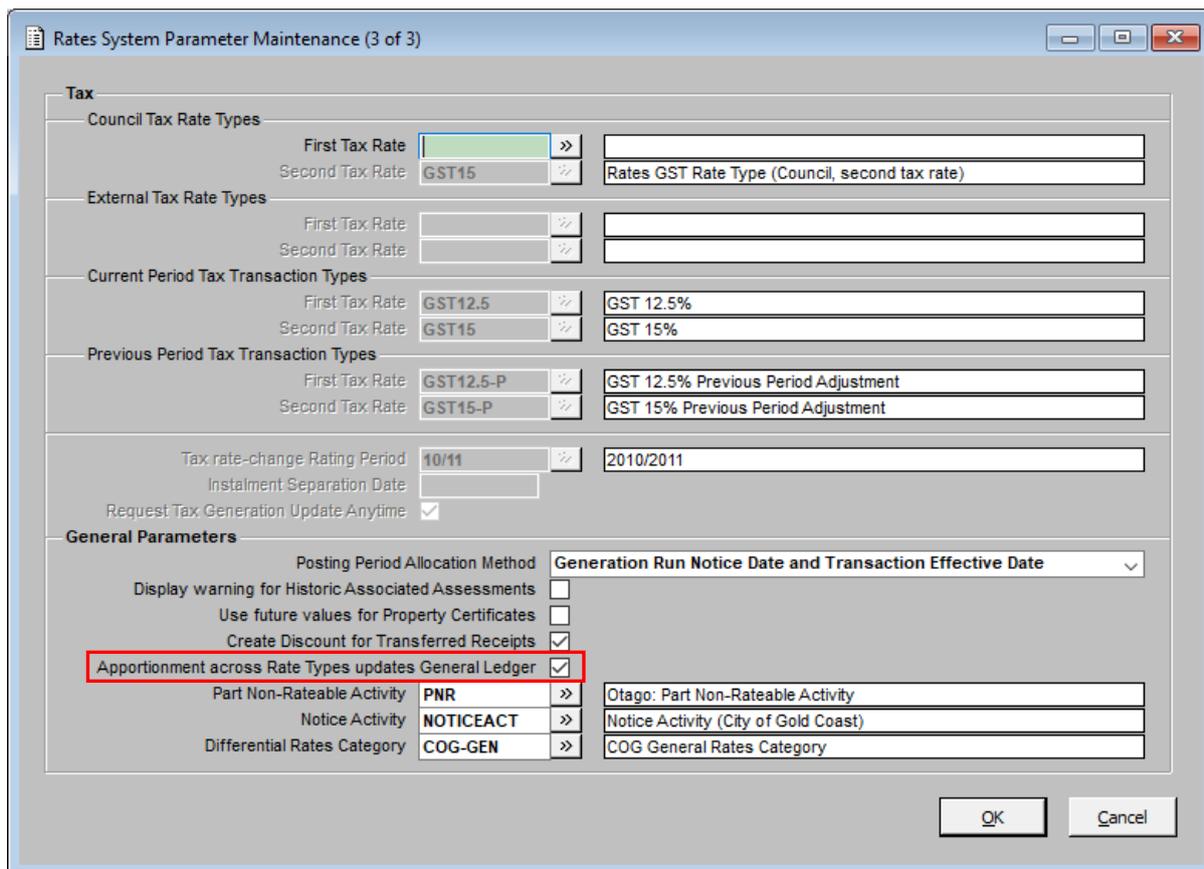
InforXtreme Incident: **SMART AND THICK CLIENT;** DRN: 30944 KB: Fix: 03107240;

APPORTIONMENT ACROSS RATE TYPES TO UPDATE GENERAL LEDGER

Pathway previously did not generate all required General Ledger transactions when apportioning a credit for one Rate Type to a debit of a different Rate Type.

Enhancements have now been made to allow sites to generate General Ledger transactions for this situation if this is what the site requires. This is particularly important when Pathway is configured to use multiple GL control accounts for different Rate Types (or groups of Rate Types).

A new Rates system parameter has been introduced to allow sites to choose if General Ledger transactions should be generated when a credit for one Rate Type is apportioned to a debit of a different Rate Type.



Set the 'Apportionment across Rate Types updates General Ledger' system parameter ON if General Ledger transactions should be generated for this situation. Otherwise leave it OFF, in which case the system will only generate the types of General Ledger transactions that it has in the past.

Previously a fix was issued for Release 03.10.011 to provide this functionality. That fix advised that if this functionality was required then the SetL.asn file should have the below text added to it. As a permanent parameter has now been added, the following text is obsolete and if present, should be removed from the SetL.asn file.

```

; Indicate whether General Ledger transactions should be created
; when apportioning a credit for one Rate Type to a debit of a different Rate Type.
;
; 0 – General Ledger transactions will not be generated for this situation
; 1 - General Ledger transactions will be generated for this situation

LRA_AppnAcrossRateTypesUpdatesGL=1
    
```

Assessment Maintenance

InforXtreme Incident: COGC DRN: 30976 Fix: 03107234;
 11122979;
 SMART AND THICK CLIENT; KB:

Transferred Receipts to check if discount is to be created.

Changes have been made to cater for the situation where the transfer of an overpayment of a Rates Assessment to another Assessment or module (e.g. a Water account) could erroneously result in the reversal of the discount of the Assessment having its receipt transferred, causing the Assessment to have an outstanding balance.

FYI: When any amount of a receipt is transferred from an Assessment

- the original receipt transaction is reversed in full along with any discount that is already granted
- if not all the receipt amount is transferred the remaining amount is placed back on the original Assessment.

The problem occurred when the transfer was done after the discount period has ended, as when the remaining receipt amount is placed back on the original Assessment and the system tries to recalculate what discount should be applicable, it finds that the discount period has ended and therefore does not create a discount transaction.

To overcome this issue, a new Rates Accounting system parameter has been introduced to allow a site to choose if receipts that are transferred to an Assessment, including any part of a receipt remaining on the original Assessment, should create discount if it was applicable as at the Receipt Date. This affects the following functions:

- Receipt Transfer functionality in Receipt Entry
- Overpayment Transfer Maintenance function in the Rates Accounting >> Assessment Maintenance
- Accounts Receivable Interface >> Debtor Maintenance functions (Gold Coast Council only functionality).

Access the Rates Accounting>> Parameters>> System Parameter Maintenance option and go to the Rates System Parameter Maintenance (3 of 3) form to set the new parameter as required:

The screenshot shows the 'Rates System Parameter Maintenance (3 of 3)' window. The 'General Parameters' section contains the following fields:

- Posting Period Allocation Method: Generation Run Notice Date and Transaction Effective Date
- Display warning for Historic Associated Assessments:
- Use future values for Property Certificates:
- Create Discount for Transferred Receipts: (highlighted with a red box)
- Part Non-Rateable Activity: >>
- Notice Activity: NOTICEACT >> Notice Activity (City of Gold Coast)
- Differential Rates Category: COG-GEN >> COG General Rates Category

Check this parameter if transferred receipts should be able to create discount.

Previously a fix was issued for Rel 3.10.011 to provide this functionality. This fix advises that if this functionality was required then the SetL.asn file should have the below text added to it. As a permanent parameter has now been added the following text is obsolete and should now be removed from the SetL.asn file if it is present.

; Indicate whether transferring a receipt from or to an Assessment
; should grant discount if discount was applicable as at the receipt date.
;
; 0 - discount will not be granted for transferred receipts
; 1 - discount will be granted for transferred receipts

LRA_CreateDiscountForTransferredReceipt=1

Smart Mobile CityWatch

Enhancements

My Requests

InforXtreme Incident: [COGC](#)
[12523460](#);

[DRN: 31080](#)

[Fix:](#)

[KB:](#)

MY REQUESTS FILTER

My Requests in CityWatch was previously displaying all Requests linked (i.e. Name Role links) to the logged on user. It now only displays the Requests linked via the 'requestor' Name Role Type.

Valuations

Enhancements

VG Number Update

InforXtreme Incident: COGC 11379611; SMART AND THICK CLIENT;	DRN: 30831 KB:	Fix: 03107198; 03107235;
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VG NUMBER UPDATE

Previously there could a problem when using the VG Number Update function, in that a Differential Rate Type could not be assigned to an Assessment's Supplementary Rates Entry as either the Assessment's Orientation or Occupancy Status attribute had no value.

Enhancements have been made so that when determining the Differential Rate Type that should be used for an Assessment's Supplementary Rate Entry, this function will cater for when the Assessment's Orientation and/or Occupancy Status attributes have no value. Therefore, a Differential Rate Type should be able to be determined for an Assessment's Supplementary Rate Entry that are in this situation.

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