Pathway
RELEASE NOTES

Enhancements

3.10.016

infor

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Pathway Release 3.10.016

Table of Contents

Introduction

This document describes enhancements and new functionality made available in Release 3.10.016 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 in three separate documents as follows:

- Infor Pathway Release Notes 3.10.016 Enhancements.pdf
- Infor Pathway Release Notes 3.10.016 Fixes and Software Corrections.pdf
- Infor Pathway Release Notes Summary 3.10.016.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)

System - Functionality

Enhancements

System

InforXtreme Incident: PARA 13939444;	DRN: 31442	Fix: 03107326; 03107327;
SMART AND THICK CLIENT;	KB:	ERS:

*.PTH LINK FILES FAIL TO OPEN

Opening a *.pth file (for example, as attached to an e-mail) can result in errors such as the following (even though "CIF_PreloadDotNetCLR=1" is in the SetL.asn file):
    Attempted to load assembly C:\Users\KSmith\AppData\Roaming\Infor\Pathway\Production\Pathway.Connector.dll and call method Pathway.Interop.Request.Managed.

    An error status of -999 has been returned to component CIFH1080.
    An error status of -999 has been returned to component CIFH1010.

This occurs if integration with third party products forces the .NET 4.0 CLR or .NET 2.0 CLR to be loaded in a Pathway session before Pathway itself attempts to load the .NET 4.0 CLR.

ION Parameters

InforXtreme Incident:	DRN: 31365	Fix:
SMART CLIENT;	KB:	ERS:

ION PARAMETERS

New BODs have been provided to facilitate the exchange of General Ledger Interface Account, Project and Transaction business objects.

ChartOfAccounts BODs for the General Ledger Interface Account business object.

ProjectMaster BODs for the General Ledger Interface Project business object.

SourceSystemJournalEntry BODs for the General Ledger Interface Transaction business object.

Calendar

InforXtreme Incident: DARE 13939635;	DRN: 31445	Fix:
SMART AND THICK CLIENT;	KB:	ERS:

Exchange Online (Office 365) Integration

Exchange Online is now supported by Pathway.

The following instructions describe how to configure Exchange Online and Pathway so that Pathway will use Exchange Online to send e-mail messages. And, optionally, so that Pathway will create, update and delete calendar appointments in Exchange Online (for example, when using the Contacts Management module in Pathway).

Note that when using Exchange Online e-mail sending will fail for users whose e-mail address does not have a corresponding mailbox in Exchange Online. This is because Exchange Online enforces that the "from" address on an e-mail must have a corresponding mailbox. In some cases, Pathway

will fall back to using MAPI to send the e-mail. But to avoid problems it is recommended that e-mail addresses on all users be updated to e-mail addresses that have mailboxes in Exchange Online.

Configure Pathway for E-mail Sending

Only perform the instructions in this section if Pathway should use Exchange Online to send e-mail messages.

1. Start the Pathway UX client or smart client.

2. Open the following menu option:
    System Administration → System Parameters → Mail and Fax Server Maintenance.

3. Under the "Mail Server Details" heading set the "SMTP Host Name/IP Address" to "**smtp.office365.com**".

4. Set the "SMTP Port Number" to "**587**".

5. Tick the "**Enable SSL For SMTP**" checkbox.

6. Set the "SMTP Account ID" to the account that can be used to log on to Exchange Online. For example, "administrator@mycouncil.onmicrosoft.com".

7. Set the "SMTP Account Password" to the password for account used to log on to Exchange Online.

8. Save the changes.

Note that the e-mail address recorded against the user currently logged on to Pathway is used as the "**from**" address when clicking the "**Send Test E-mail**" button. If the "from" address on an e-mail does not have a corresponding mailbox in Exchange Online, then Exchange Online will not send the e-mail and will respond with the following error message:

Transaction failed. The server response was: 5.2.0 STOREDRV.Submission.Exception:SendAsDeniedException.MapiExceptionSendAsDenied; Failed to process message due to a permanent exception with message Cannot submit message. 0.35250:CF050000, 1.36674:0A000000, 1.61250:00000000... [[554]]

To resolve this problem, open the following menu option and change the e-mail address of the currently logged on user to an e-mail address that does have a mailbox in Exchange Online:

System Administration → Menu → User Maintenance

Note that the outcome of test e-mail sends can be checked in the following menu option:

System Administration → System Parameters → E-mail Message Maintenance

Configure Exchange Online for Calendar Integration

Only perform the instructions in this section if Pathway should create, update and delete calendar appointments in Exchange Online (for example, when using the Contacts Management module in Pathway).

1. In a web browser, browse to the following URL (for "Azure Active Directory admin centre") and click "App registrations" under "Manage".

    https://aad.portal.azure.com/#blade/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/RegisteredApps

Create an "App registration" by clicking the "New registration" button, entering a name and clicking the "Register" button (in this example the name "ExchangeOnlineTest" has been used).
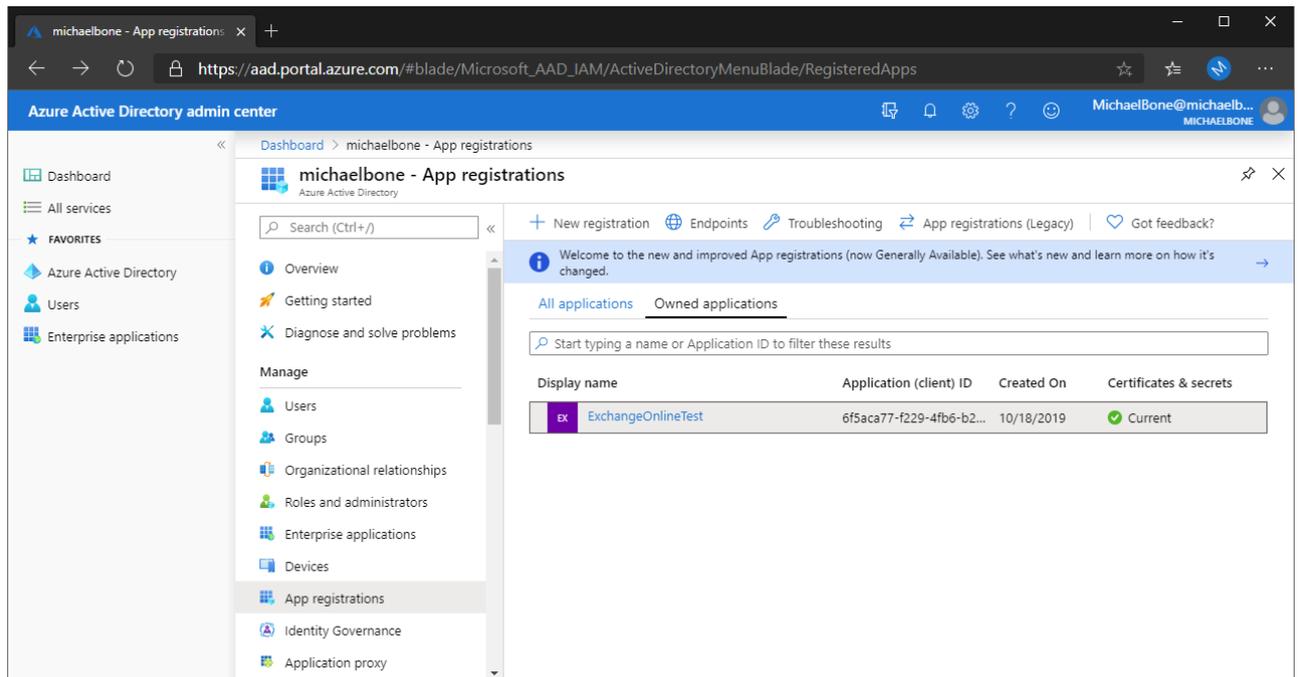

2. Manage the "App registration" by clicking the hyperlink for the App registration (for example, the "ExchangeOnlineTest" hyperlink in the previous screen shot).

Take note of the **Application (client) ID** (for example, 6f5aca77-f229-4fb6-b2da-983840563252).

Take note of the **Directory (tenant) ID** (for example, 161773f7-ed45-49a5-8a0c-9fdb6a4590da).
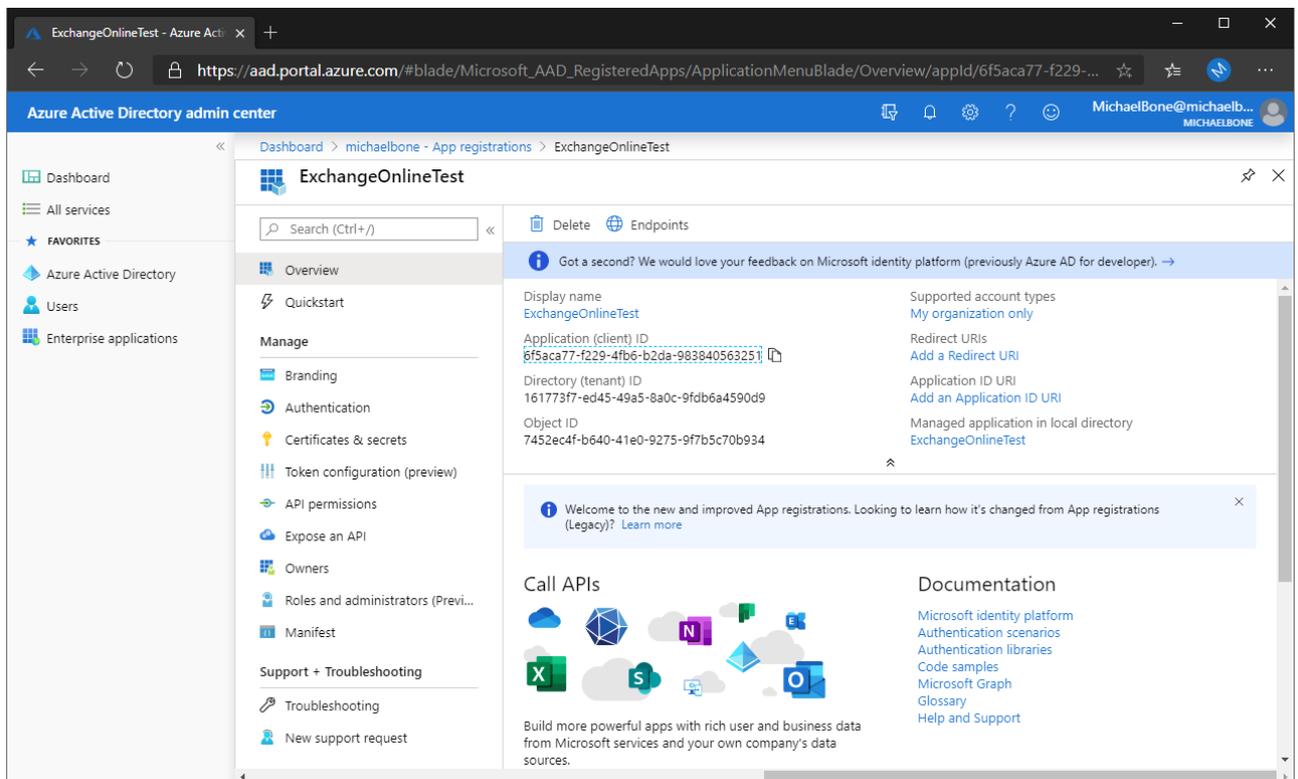
3. Click "Certificates & secrets" under "Manage" and create a secret by clicking the "New client secret" button. Take note of the **client secret**. For example, @d[fm0T:pha:Q7t0FO15d0-5DNxbWISt.
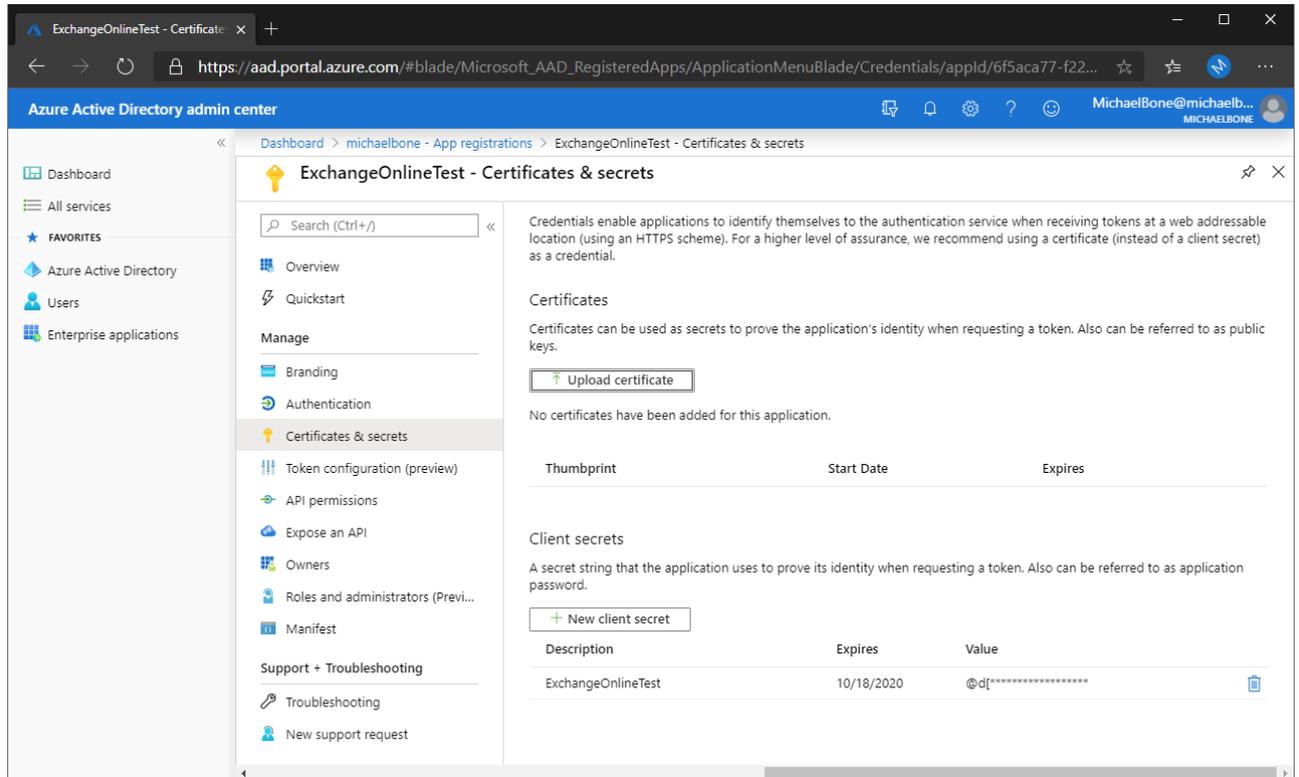
4. Click "API permissions" under "Manage".
    a) Click the "Add a permission" button.
    b) Scroll down and click the "Exchange" tile under "Supported legacy APIs".
    c) Select "Application permissions".
    d) Expand the "EWS" branch and tick the "full_access_as_app" checkbox (i.e. "Use Exchange Web Services with full access to all mailboxes").
    e) Click the "Grant admin consent for …" button (otherwise the "full_access_as_app" permission will not take effect).
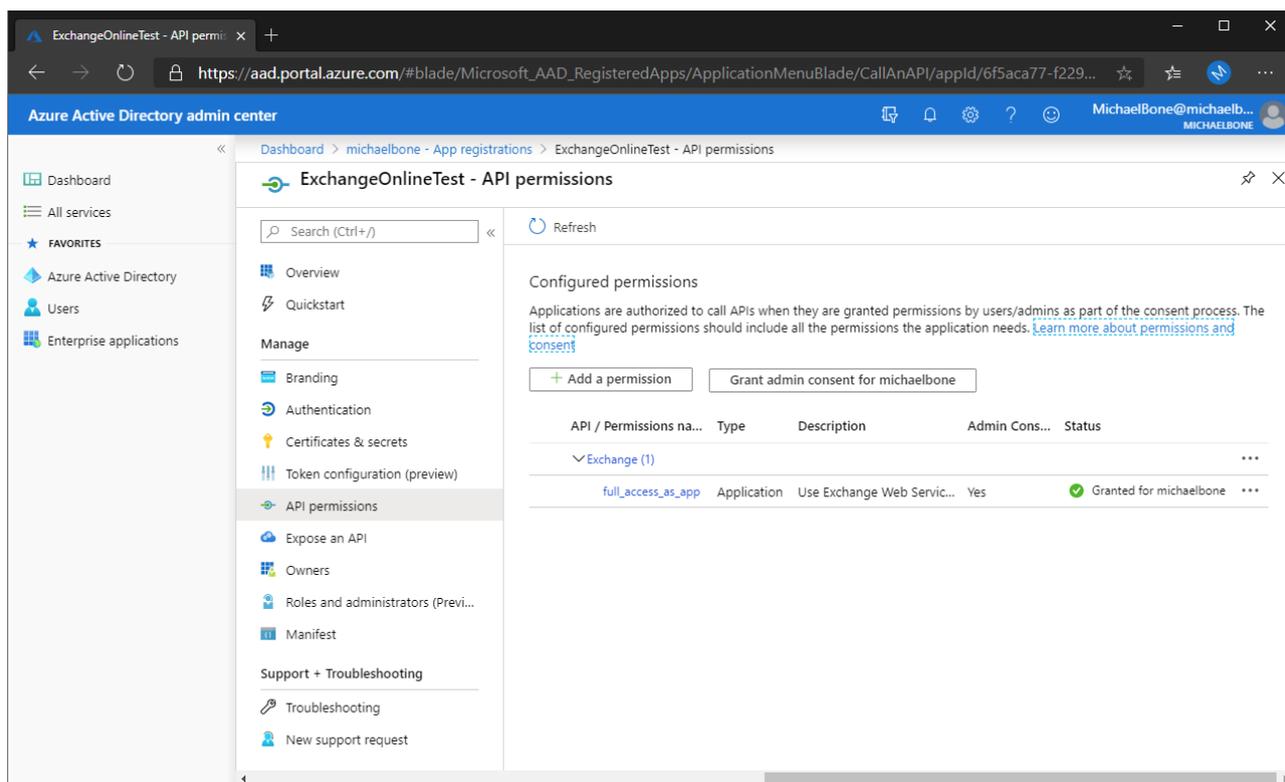
5. Perform the steps in the following section so that Pathway will use this new "App registration" to create, update and delete calendar appointments in Microsoft Online.

See the following for more information:

Authenticate an EWS application by using OAuth
https://docs.microsoft.com/en-us/exchange/client-developer/exchange-web-services/how-to-authenticate-an-ews-application-by-using-oauth

Note that it may take a minute or two for permissions changes to take effect in Exchange Online.

Configure Pathway for Calendar Integration

Only perform the instructions in this section if Pathway should create, update and delete calendar appointments in Exchange Online (for example, when using the Contacts Management module in Pathway).

1. Start the Pathway UX client or smart client.

2. Open the following menu option:
    System Administration → System Parameters → Mail and Fax Server Maintenance.

3. Under the "Exchange Server Integration Details" heading tick the **Active** checkbox.

4. Set the "Exchange Online Host" to "**outlook.office365.com**".

5. Set the "Exchange Online Authority". This is the **Directory (tenant) ID** that was noted down earlier prefixed with "https://login.microsoftonline.com/". For example, https://login.microsoftonline.com/161773f7-ed45-49a5-8a0c-9fdb6a4590da

6. Set the "Exchange Online Client ID". This is the **Application (client) ID** that was noted down earlier. For example, 6f5aca77-f229-4fb6-b2da-983840563252

7. Set the "Exchange Online Client Secret". This is the **client secret** that was noted down earlier.
    For example, @d[fm0T:pha:Q7t0FO15d0-5DNxbWISt

8. Save the changes.

Note that **ExchangeOnlineTest.exe** (found in the "msc" subfolder of the Pathway environment) can
be used to test Pathway Calendar Integration functionality. For example, ExchangeOnlineTest.exe
can be used to troubleshoot Exchange Online authentication problems.

Applications

Enhancements

Application Maintenance

InforXtreme Incident:	DRN: 31366	Fix:
THICK CLIENT;	KB:	ERS:

APPLICATION FEES POP UP

A new Fee Type column has been added to the Application Fees Pop Up within the Thick Client version of Pathway. Previously, the fee type was displayed within the Description column label.
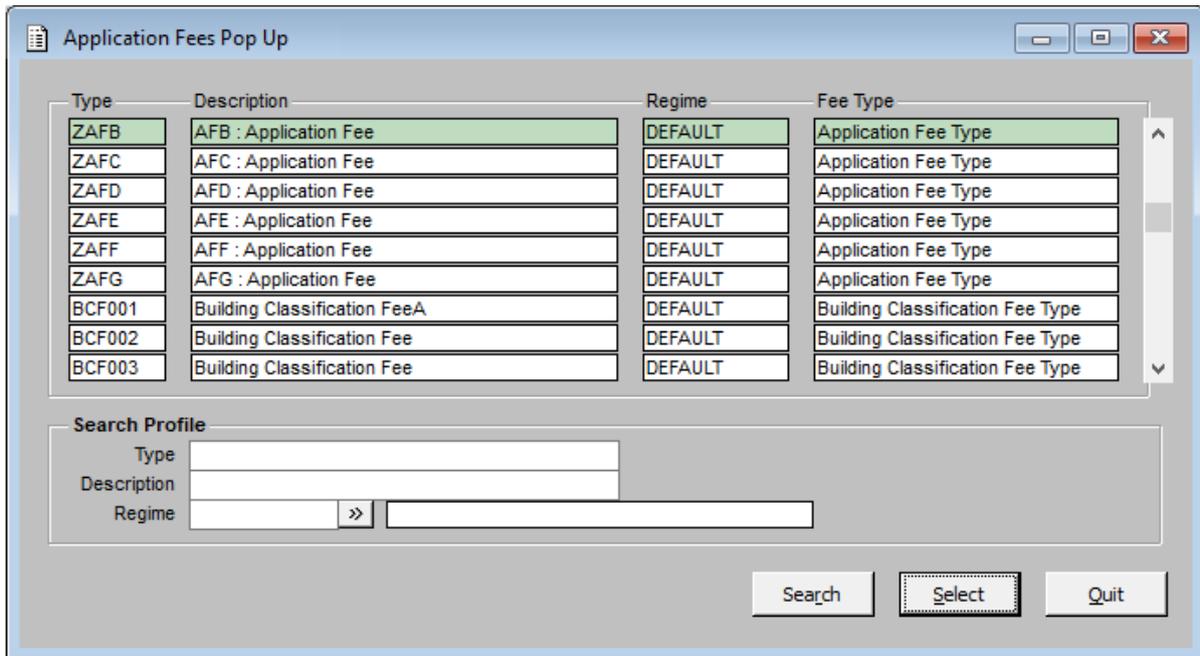
Debtors

Enhancements

New Direct Debit functionality

InforXtreme Incident: COGC 10996957;	DRN: 30577	Fix:
SMART AND THICK CLIENT;	KB:	ERS:

NEW DIRECT DEBIT FUNCTIONALITY

Overview

Enhancements have been made to the Direct Debit functionality by introducing a new type of Direct Debit called 'Due Date'.

When a Due Date Direct Debit type is in place for a Debtor and a Direct Debit Extraction is run, then any amount due on the date being extracted for, will be extracted as it is due on that date (or was due before that date).

It is envisaged that the Due Date Direct Debit Type will be a replacement for the existing Current and Nett Direct Debit Types and their underlying functionality.

It is proposed that the Current and Nett Direct Debit Types will be made obsolete in a future release. Therefore, each site should check if the new Due Date Direct Debit type meets their requirements and if so, should use the new Due Date type instead of the Current or Nett types. Please advise Infor if the Due Date Direct Debit Type does not meet your requirements. Please refer to the 'Converting existing Current/Nett schemes to Due Date schemes' section lower for other information concerning this.

Direct Debit Type Maintenance

The new Direct Debit Type of 'Due Date' can now be selected:

Direct Debit Maintenance

The Direct Debit Maintenance form has been enhanced to cater for the new 'Due Date' Direct Debit type. When a Due Date Direct Debit Type is selected the Invoice Period is not relevant and therefore the field is not available for selection.

Invoice Period Maintenance

The Invoice Period Maintenance form has been enhanced to detect if an existing Invoice Period has its Pay by Date changed. If so, and Direct Debits are in use, a hidden flag is set within the system to advise it that this has occurred. When the Debtors Direct Debit Extraction function is next run, it checks this flag. If it is on, then every Due Date Direct Debit linked to a Debtor, where the Direct Debit Status is Created, Extracted or Updated, will have details reset so that the Extraction process will redetermine when debts are due so that they can be extracted correctly.

Direct Debit Extraction

This Direct Debit Extraction form has been enhanced to cater for the new Due Date Direct Debit Type.

If a Due Date Direct Debit is in place for a Debtor and a Direct Debit Extraction is run, then the Debtors lines are examined to determine then the next set of debt is due, therefore extracting the correct amount for the date range nominated.

Direct Debit Recalculation

Enhancements have been made to the Direct Debit Recalculation function to cater for creating a Due Date Direct Debit Type.

Other

The following functions have also been enhanced to cater for the new Due Date Direct Debt Type.
- If Direct Debits are in use, any function that creates a relevant debit line for a Debtor will trigger the Direct Debit Extraction function, the next time it is run, to check if that Debtor has an amount that should be extracted.

- External Receipt Import.

Converting existing Current/Nett schemes to Due Date schemes

If it is found that the functionality provided by the new Due Date Direct Debit Type meets Council requirements, and can be used instead of using existing Current or Nett Direct Debit Types, one of the following two things can be done:

1. Manually change the existing Current and Nett Direct Debit Types to be Due Date types. This can be done by accessing the Direct Debit Type Maintenance option and changing the Type from Current/Nett to Due Date. After that has been done the system will treat all the original Current/Nett Direct Debits for Assessments as a Due Date Direct Debit. Those Direct Debits will no longer display the Generation Run field.
2. Keep a history of the Direct Debits as they currently exist and create new Due Date Direct Debits as replacements for the existing Current/Nett Direct Debits. To help achieve this a conversion form has been provided.

The conversion form:

Running this conversion causes each active (Created, Extracted or Updated) Direct Debit of the nominated Current/Nett Direct Debit Type to be processed. In doing so it:
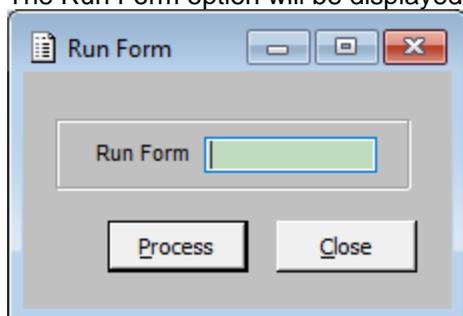
- Creates a duplicate record of that record and sets the new record to the nominated Due Date Direct Debit Type.
- Changes the original record to Historic.

At the end of processing it sets the Active flag of the nominated Current/Nett Direct Debit Type Parameter Off so that it is no longer available for selection when creating new Direct Debits.

Before the conversion program is run in Production, it is highly recommended that it is run in a non-Production environment first. The data in the non-Production environment should match the data in Production as closely as possible. It is also recommended that before running the conversion program in Production that a backup of the data is taken.

Running the conversion form:

1. Start a thick client session.
2. Sign on the Pathway environment as SCASYS.
3. Select the drop-down menu option Tools → Run.
   The Run Form option will be displayed.

4. Enter the form LCVG1710 and press Process.
   The 'Convert scheme to Due Date scheme' form will be displayed:

5. Nominate the Debtors Application and enter the Current or Nett Direct Debit Type that is to be replaced. Enter the Due Date Direct Debit Type that is being used as the replacement type.

6. Pressing Process will cause the converting process to run. The progress of the processing is shown in the message line.

7. The message frame will be displayed automatically when the process has completed advising the following:
a) the number of Current/Nett Direct Debit schemes that have been made Historic.
b) the number of replacement Due Date schemes that have been created.
c) the Current/Nett Direct Debit Type that has been made inactive.

The message frame can also be viewed by selecting the drop-down menu option View → Message Frame.

Example Message Frame:

```
====================================
 Convert scheme to Due Date scheme
====================================

Number of Current/Nett schemes made Historic: 12
Number of Due Date schemes created:         12

The DRNETT Direct Debit Type has been made Inactive

=============== End of Report ====================
```

Document Management

Enhancements

Generic Document Management

InforXtreme Incident:	DRN: 31346	Fix: 03107331;
SMART AND THICK CLIENT;	KB:	ERS:

** GENCON SITES ONLY **

GENCON has now been enhanced to properly support documents and attachments generated in the Water Billing module.

Please note that this feature only applies for Water Billing Assessments where the 'Use Separate Assessments' flag in the Rates System Parameteres in ON. If separate Water Billing Assessments are not in use, GENCON will continue to treat Water Billing documents (attachments) as Rates documents (attachments).

ePathway System

Enhancements

ePathway and CityWatch Recaptcha

InforXtreme Incident: CAMP 11208197;	DRN: 31468	Fix:
	KB:	ERS: 23413;

INVISIBLE RECAPTCHA

Invisible reCaptcha has been implemented in CityWatch and ePathway. This differs from the previous version in the way it analyses user activity (e.g. mouse movements and typing patterns) to determine if a user is a robot. Only suspicious 'users' will be prompted to solve a captcha puzzle.

IMPORTANT Recaptcha will not work using your old Recaptcha API keys. You will need to get new keys at https://www.google.com/recaptcha/admin (Choose 'Register a new website' then click on 'invisible reCaptcha'). You should then enter the generated keys in System Parameters.

ePathway Page Layout

InforXtreme Incident:	DRN: 31460	Fix:
	KB:	ERS:

PAGE GROUPS FORMATTING

On the Page Groups form the 'Confirm Text' and 'Fields' links have been separated to make it easier to identify the individual links.

ePathway Payments

InforXtreme Incident: ATA 11613874;	DRN: 31337	Fix:
	KB:	ERS:

NEW TIMEOUT FIELD FOR PXPAY PAYMENT GATEWAY

PxPay have introduced a new optional timeout field that allows the payment page to expire and return a DECLINED response to ePathway.

ePathway User Registration

InforXtreme Incident: COGC 13914330;	DRN: 31411	Fix:
SMART AND THICK CLIENT;	KB:	ERS:

DELIVERY METHOD

A new parameter is now available to allow councils to choose whether or not to apply the delivery method a web user chooses during online user registration to the Pathway Name (be it a Company or Person).

The new parameter can be activated from System Administration >> Customer Profile Parameters >> Application Function Maintenance >> ESYUREG >> Attribute Type Options >> Function >> Apply Delivery Method to NAR

Note:

1. By default, existing behaviour is retained. i.e. In order to update to NAR councils will need to activate the new parameter.

2. The update applies to new user creation and modification

ePathway Core

InforXtreme Incident: ARMI 13961843;	DRN: 31459	Fix:
	KB:	ERS:

ACCESSIBILITY IMPROVEMENTS

General improvements have been made around Accessibility in ePathway. These mainly include styling changes and the adding of aria-label attributes to many controls and forms.

ePathway MyAccounts

InforXtreme Incident: GLAD 12519914;	DRN: 31340	Fix:
	KB:	ERS:

ANIMAL REFERENCES

Animal References in the MyAccounts page no longer include the Period Code. This applies to ePathway and CityWatch.

ePathway Forgotten Password

InforXtreme Incident: COGC 12834872;	DRN: 31218	Fix:
	KB:	ERS:

ePathway and CityWatch Forgotten Password

A change has been made to no longer email users a randomly generated password when they have forgotten their password. A 6 digit Activation Code is now emailed to the user and this key must be entered before they are allowed to reset their password. Once forced to change the password, the user can not re-enter the current password.

ePathway

The user is still required to enter some validation fields:

User Name *

First Name

Surname/Company Name *

Next

The user is subsequently taken to a new form which allows them to enter the Activation Code that has just been emailed. The User is then able to choose their your own password:

Some wording on the emails associated with this function will obviously need to change to reflect the system is sending an Activation Code rather than a generated password. Council can configure email text at **Layout > Page Layout > ePathway User Registration > LOGINHELP > Text**

System Text values have also been added for this functionality. They can be configured at **Layout > Text**

|	
Registration.Email.ActivationCodeSubject	Login Assistance - Activation Code
Registration.Email.ActivationCodeHeader	Your request for login assistance has been processed. Your Activation Code is:
Password.ActivationInstructions	An Activation Code has just been emailed to you. Please enter this code along with your new password below
Registration.LoginAssistActivationSuccessText	Your Password has now been reset.

CityWatch

CityWatch works in the same way:
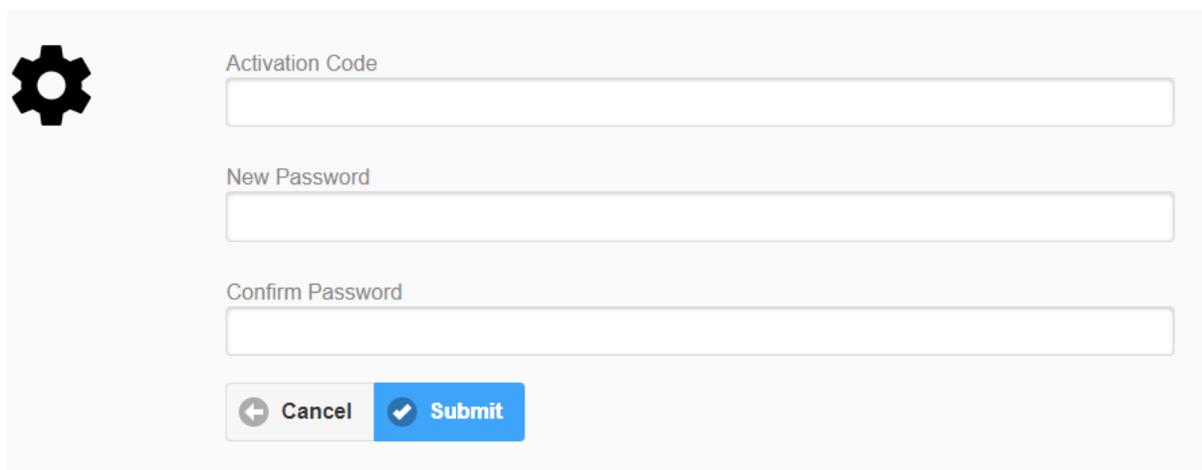
Activate Password screen is configurable via Pathway Preferences: **Pathway > System Administration > Integration > Smart Mobile Preferences > CityWatch Preferences Maintenance > Users**:
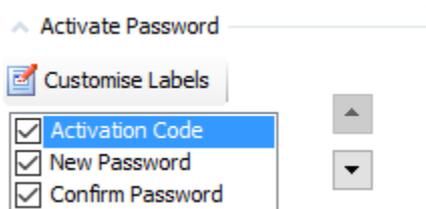
Council will need to go into this form and save the Preferences (even if no changes are required) before this will work in CityWatch.

ePathway and CityWatch Logon

| InforXtreme Incident: | DRN: 31425 | Fix: |
| SMART AND THICK CLIENT; | KB: | ERS: 7015; |

LOGGING IN USING EMAIL ADDRESS

A user now has the option to log in to ePathway or CityWatch using their email address.

Note: This option is dependant on there only being one user account linked to the email address.

The 'AllowLoginByEmailAddress' setting needs to be switched on in System Parameters to invoke this feature.

ePathway Applications

Enhancements

ePathway Applications Enquiry

InforXtreme Incident: CCC 14046730;	DRN: 31469	Fix:
SMART AND THICK CLIENT;	KB:	ERS:

EPATHWAY APPLICATIONS ENQUIRY SORTS BY LODGEMENT DATE (DESCENDING)

The ePathway Applications Enquiry has been modified to consistently sort results in descending order by Lodgement Date.

ePathway Certificate Request

Enhancements

ePathway Certificate Requests

InforXtreme Incident:	DRN: 31485	Fix:
SMART AND THICK CLIENT;	KB:	ERS: 45332;

CERTIFICATE REQUESTS COST STRUCTURE

OVERVIEW

Pathway currently allows a certificate request to be lodged on either a property or parcel within the property structure. An enhancement has been made to allow councils to choose for a certificate type to be charged per Title rather than per certificate produced when producing certificates at the Parcel level.

I.e. The cost of a certificate is currently calculated based on the number of distinct certificates requested. When a Merge Type is currently configured for the Parcel Request Level, then each certificate produced for each parcel will incur the certificate cost. This enhancement allows an additional option to opt to only incur the cost for each unique Title.

PARAMETER CHANGES

The Merge Type maintenance form now includes a "Calculate cost on per-title basis" check box which is only accessible for Parcel based Request Level merge types as shown below:

System Administration >> ePathway >> Property Administration Parameters >> Certificate Request Parameters >> Certificate Type Selection >> [Merge Type]

By default, this option will be unchecked, so taking no action will result in the system to continue to behave unchanged, thus incurring the certificate costs for each Parcel for which a certificate is produced. If this new check box is activated, however, then certificates produced for this merge type in ePathway will only incur a cost for the first Title listed for each Parcel.

Note that once a change has been made to a merge type, it is necessary to export the changes to ePathway before it will take affect:

System Administration >> ePathway >> System Processing >> Web Server Export >> Merge Type Export

CERTIFICATE COST CALCULATION

Web users can search for parcels to lodge their certificate request against either by:
- A property address
- A title search
- A parcel search
- A map search

Depending on how the properties/title/parcels returned by the search are related then it is possible that any given parcel is listed multiple times – that is, a single title is shared across many properties or a single parcel is linked to many titles. Only titles/parcels with a current status and current link status are returned by the search and selectable in ePathway.

**Example One – Single Title/Parcel Property Structure**

In many cases a simple property structure would exist where a property has a single title associated to it and that single title has a single parcel of land associated also. This can be represented hierarchically as follows:

In this instance the parcel will only ever be returned to ePathway once per search and selecting that parcel will result in one time the charge rate from the related merge type to be charged (there is one title related to the parcel selected in the certificate lodgement process).

**Example Two – Multiple Title/Parcels in a Property Structure**

A simple extension to the above scenario is where a single property has many titles associated to it and each of these titles has a single parcel related. In this example the title is not shared across many properties and the title is only linked to a single parcel also.
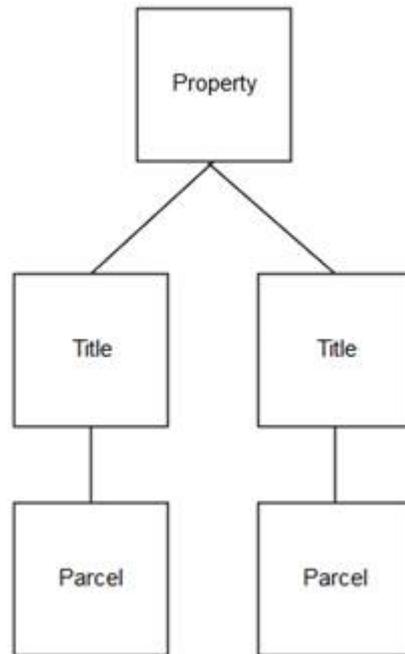
Where only one parcel is selected in the certificate request process then ePathway would calculate the cost at one times the charge rate from the related merge type (there is one title related to the parcel selected in the certificate lodgement process). When both parcels are selected in the lodgement process then ePathway would calculate the cost at two times the charge rate from the related merge type (there are two titles related to the parcel selected in the certificate lodgement process).

Example Three – Multiple Parcels/Single Title in a Property Structure

It is also possible that in a single property structure for a single title to be related to multiple parcels. In this example the title is not shared across many properties and so this property is the only instance where the titles and parcels exist.
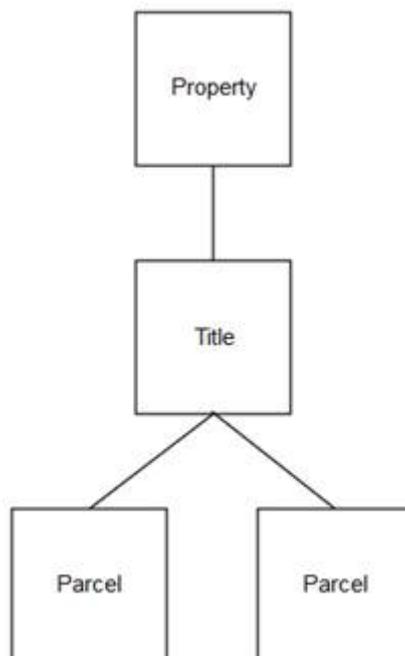
Where only one parcel is selected in the certificate request process then ePathway would calculate the cost at one times the charge rate from the related merge type (there is one title related to the parcel selected in the certificate lodgement process). When both parcels are selected in the lodgement process then ePathway would still only calculate the cost at **one times the charge rate** from the related merge type because there is only one title in total related to the parcels selected in the certificate lodgement process. Two separate certificate requests would be lodged in Pathway still – one against each parcel selected.

Example Four – Single Parcel/Multiple Titles in a Property Structure

Although unlikely, the converse situation to having many parcels related on a single title across many properties is where a single parcel is associated to many unshared titles in a single property structure. Once again, the titles are not shared across many properties and so this property is the only instance where the titles and parcels exist.
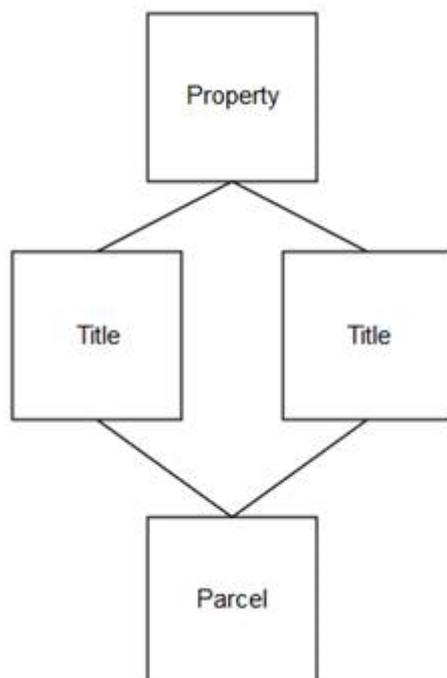
When this single parcel is selected in the certificate request process then ePathway would calculate the cost at **two times the charge rate** from the related merge type (there are two titles related to the parcel selected in the certificate lodgement process). Only one certificate request would ever be produced from Pathway from against the parcel in question because we are lodging the request at the parcel level, but the requestor would in effect be charged twice for that single certificate produced.

Example Five – Single Parcel/Multiple Titles across multiple Properties

This is the scenario where a single title is shared across multiple properties and under certain search conditions (search by address or parcel) then the same parcel is returned multiple times in a search.
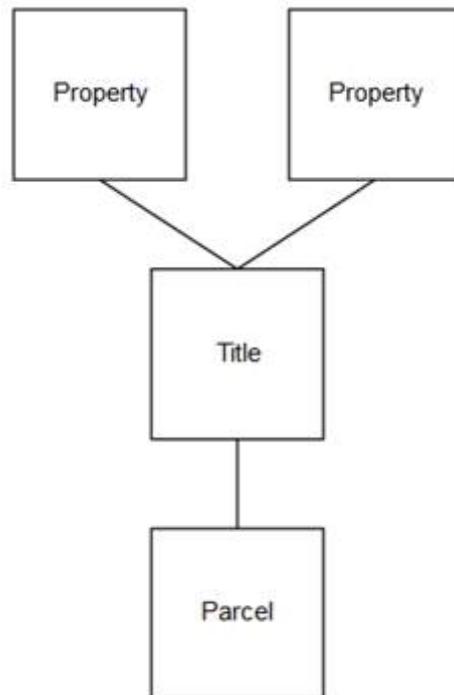
When this single parcel is selected in the certificate request process then ePathway will calculate the cost at **one times the charge rate** from the related merge type regardless of the number of unique times this parcel is selected in a search result.

ePathway should still behave as it did previously in terms of creating a certificate request against each property/title/parcel combination selected by the web user however the charge will now only reflect the number of distinct titles involved in this selection.

ePathway Customer Service

Enhancements

ePathway Customer Service

InforXtreme Incident: COGC 13835116;	DRN: 31378	Fix:
SMART AND THICK CLIENT;	KB:	ERS:

CUSTOMER SERVICE TRANSACTION REFERENCE

It is now possible to opt for the Transaction Reference displayed to be the actual Pathway Request Number.

Councils can choose to retain the existing ePathway reference or opt to use the actual Pathway Request Number for Customer Requests created from ePathway via a new system configuration setting.

ADMIN >> Configuration >> System Parameters >> CustomerService.ReserveRequestNumber

CustomerService		
CustomerService.PublicRequestsByType	This flag determines if the Public Requests By Type search option is allowed within the Customer Service Enquiry option. When set to False this option is hidden for both public and registered users.	☐
CustomerService.ReserveRequestNumber	If enabled then the system will reserve a Pathway Customer Request Number for requests added via ePathway and use it as the Transaction Reference.	☑

When disabled, the system will continue to provide an ePathway specific reference. E.g. "SR-4321". When enabled, the system will reserve a Pathway Request Number which will be presented instead without the prefix.

Sample Submission form:

Sample email:

Note: Requests created via City Watch mobile entry already utilise the Pathway Request Number as the transaction reference and will continue to do so except that when the new option is enabled the reference will no longer be shown with a prefix.

E.g. Instead of "SR-185004" it will show as "185004".

ePathway General Enquiry

Enhancements

ePathway General Enquiry Rates Direct Debits

InforXtreme Incident:	DRN: 31427	Fix:
SMART AND THICK CLIENT;	KB:	ERS: 22403;

DIRECT DEBIT ENTRY ENHANCEMENTS

Three key changes have been made to online Direct Debit Requests via ePathway:

1. Direct Debit entry can now be performed for Instalment based Direct Debits
2. The initial Header and Instructions text used on the Direct Debit Entry form has more flexible rules to allow the instructions to initially be general to all potential Schedule Types (Periodic, Due Date and now Instalment) until one is chosen. Once chosen then the instructions specific to the chosen type will be displayed.
3. The Generation Run specified in parameters for Direct Debit entry is now different for each rate account type. I.e. It can now be different for a Rates, Water or Special Rates/Charges entry.

See explanations in subsequent sections of this document to better understand these changes.

DIRECT DEBIT INSTALMENT ENTRY

It is now possible to configure Instalment based Direct Debit Types to allow ratepayers to choose an additional Schedule Type. The ePathway Direct Debit parameters have been altered to allow this configuration with the changed/new fields highlighted on the screen image below.

NOTE: The changes for the Generation Run field on this same form will be mentioned separately in a later section.

System Administration >> ePathway >> General Enquiry Parameters >> Rates Enquiry Parameters >> Rates Enquiry Parameters >> Direct Debits

As per each of the other Direct Debit Types, leaving the field blank will simply mean that the Rate account type has been omitted and will not allow entry for an Instalment based Direct Debit Request.

The existing Direct Debit Types field still takes precedence and has been expanded to include Instalments in the possible combinations. It will retain its existing value. E.g. If it was previously set to allow both Periodic and Due Date types, then it will still do so and will need to be changed to "All" as shown above to additionally include Instalments.

Within ePathway, the layout, email format and field labels can now also be defined for Instalment Direct Debit entry by the Admin user. Note that it is necessary to first perform a Web Server Export for these new parameters to be available via:

System Administration >> ePathway >> System Processing >> Web Server Export >> General Enquiry – Rates

After performing the Web Server Export the new setup can be reached in ePathway via:
ADMIN >> Layout >> Page Layout >> ePathway Direct Debit Request

Direct Debit Requests Types

This page allows you to maintain the Dynamic Layout for the Direct Debit Requests Types.

Code	Description	Instructions	
PERIODIC	Periodic Direct Debit Request	`<b>Periodic</b> ` For Periodic Direct Debits, Rate account	Agreement Text Layout
DUEDATE	Direct Debit on Due Date Request	`<b>Due Date</b> ` Due Date based direct debits are processed by	Agreement Text Layout
AMEND	Amend Direct Debit		Agreement Text
CANCEL	Cancel Direct Debit		Agreement Text
INSTALMENT	Direct Debit Instalments Request	`<b>Instalment</b> ` Instalment based Direct debits are processed by	Agreement Text Layout

Cancel   Update

DIRECT DEBIT ENTRY – HEADER AND INSTRUCTION TEXT PRIORITY EXPLAINED

A minor change has been made when determining the Header and Instruction text for the initial presentation of the Direct Debit entry form when online users choose to create a new Direct Debit.

I.e. The text shown in the red highlighted area on the sample form below.

Assessment

This is the Assessment for the Direct Debit.
Assessment Number   17
Ratepayer Names   E J S Dalidowicz and Others.

Total Outstanding $523.47
End Date of Rating Period   30/06/2020

Direct Debit Request Details

Please select from the following Direct Debit Schedule Types:
Due Date
Due Date based direct debits are processed by Council for the amount due on the due date of the notice.
Instalment
Instalment based Direct debits are processed by Council for the amount due for each instalment on the dates nominated by council.
Periodic
For Periodic Direct Debits, Rate account payments to Council will be automatically deducted from your bank account for the frequency and amount you have/will nominated below.
The amount is determined by the Payment Type. It can be Calculated, in which case the system will determine the amount based upon what is currently outstanding, or you can opt to Specify Amount to set a nominated amount which will not vary for the duration of the arrangement.
* Denotes that the field is mandatory.

Schedule Type *   Instalment
Commencement Date *   21/11/2019

Previous   Next

Previously the system would choose the Header and Instruction text based using the following criteria:

1. If a description or instructions are defined for the default Schedule type initially displayed, (i.e. ADMIN >> Layout >> Page Layout >> ePathway Direct Debit Request >> Description/Instructions), then this would be used, ELSE
2. From the DirectDebits.RequestDirectDebitHeading or DirectDebits.RequestDirectDebitInstruct text defined via ADMIN >> Layout >> Text >> Direct Debit Requests.

This, however, did not allow for a more general Header and Instructions to be shown for the initial display until the user actually selected the desired Schedule Type. As such, a change has been made so that until the user has selected the Schedule Type and pressed the Next/Continue button the DirectDebits.RequestDirectDebitHeading and DirectDebits.RequestDirectDebitInstruct will always be displayed. The above rules will then be applied after that point (during entry of additional details including the banking information). That then allows the instructions to be more specifically tailored once the ratepayer has chosen a Schedule Type.

E.g. The sample screen below shows that once the ratepayer has pressed Next/Continue above, the highlighted area in the red box changes with specific instructions for Instalment entry.

Assessment

This is the Assessment for the Direct Debit.
Assessment Number   17
Ratepayer Names   E J S Dalidowicz and Others.

Total Outstanding $523.47
End Date of Rating Period 30/06/2020

Direct Debit Instalments Request

Instalment
Instalment based Direct debits are processed by Council for the amount due for each instalment on the dates nominated by council.
Denotes that the field is mandatory.

Schedule Type   Instalment
Commencement Date   21/11/2019

Bank Account Details

Please enter the bank account details for the Direct Debit below.
BSB *   012215 [ANZ - 243 LIVERPOOL RD]
Account Number *   123456789
Account Name *   Instalments Incorporated Pty Ltd

[Previous] [Next]

Once the main details are entered, the confirmation form is displayed as shown on the screen below.

Direct Debit Instalments Request

Instalment
Instalment based Direct debits are processed by Council for the amount due for each instalment on the dates nominated by council.
Assessment Number   17
Ratepayer Names   E J S Dalidowicz and Others.

Confirm Your Direct Debit Request

Below are the details of your Instalment based Direct Debit Request. Click the Next button to continue once you are sure that all of the details have been completed correctly.

Schedule Type	Instalment
Commencement Date	21/11/2019
Total Outstanding	$523.47
BSB	012215 [ANZ - 243 LIVERPOOL RD]
Account Number	123456789
Account Name	Instalments Incorporated Pty Ltd

Sequence	Payment Date	Payment Amount
1	1/03/2020	$143.47
2	1/06/2020	$380.00

[Previous] [Next]

It is therefore important for councils to review the text for DirectDebits.RequestDirectDebitHeading and DirectDebits.RequestDirectDebitInstruct (via ADMIN >> Layout >> Text >> Direct Debit Requests) to ensure Direct Debit entry still appears as desired.

DIRECT DEBIT GENERATION RUN PARAMETERS

The Generation Run defined for the Direct Debit online parameters has been split into 3 separate fields instead of the previous one so that each account type (Rates, Water or Special Rates/Charges) can have a different Generation Run nominated. This Generation Run is what is placed on the Due Date, and now also Instalment Direct Debits created in Pathway.

System Administration >> ePathway >> General Enquiry Parameters >> Rates Enquiry Parameters >> Rates Enquiry Parameters >> Direct Debits

Online Direct Debit Rates Parameters

Controls

☑ Request Direct Debit	☑ Allow Weekly	☑ Allow Monday
☑ Amend Direct Debit	☑ Allow Fortnightly	☑ Allow Tuesday
☑ Cancel Direct Debit	☑ Allow Monthly	☑ Allow Wednesday
	☑ Allow Quarterly	☑ Allow Thursday
☑ Validate BSB During Entry	☑ Allow Half Yearly	☑ Allow Friday
		☑ Allow Saturday
		☑ Allow Sunday

Direct Debit Types: **All**

DDR Transaction Reference: **DDRREF** » Direct Debit Request Reference

Days Notice: **0**

Future Years Limit (End Date): **3**

Rates

Generation Run	**19/20** »	Annual Rates Generation 2019/20
Periodic Direct Debit Type	**MLSCHED** »	Rates Periodic (Online)
Periodic Fixed Direct Debit Type	**MLFIXED** »	Fixed Scheduled Amount
Due Date Direct Debit Type	**MLCURR** »	Rates Due Date (Online)
Instalment Direct Debit Type	**MLINSTAL** »	Rates Instalment (Online)

Water Billing

Generation Run	**19/20** »	Annual Rates Generation 2019/20
Periodic Direct Debit Type	**WBSCHED** »	Water Billing Periodic (Online)
Periodic Fixed Direct Debit Type	**WBFIXED** »	Fixed Scheduled Amount
Due Date Direct Debit Type	**WBCURR** »	Water Billing Due Date (Online)
Instalment Direct Debit Type	**WBINSTAL** »	Water Billing Instalments (Online)

Spec Rate/Charge

Generation Run	»	
Periodic Direct Debit Type	**SRSCHED** »	Special Rates Periodic (Online)
Periodic Fixed Direct Debit Type	**SRFIXED** »	Fixed Scheduled Amount
Due Date Direct Debit Type	**SRCURR** »	Special Rates Due Date (Online)
Instalment Direct Debit Type	**SRINSTAL** »	Special Rates Instalments (Online)

Options

☐ **Direct Debit Service Request**

OK   Cancel

NOTE:

- If the Water or Special Rates/Charges Generation Run is left blank, then the system will default to using the one defined for Rates, but it is recommended to explicitly define each.

For Direct Debits created online as Due Date based, their Direct Debit Types within Pathway are either Nett or Current based and will therefore be automatically updated by the Rates Generation post processing and have their Generation Run, Start Date and End Dates automatically adjusted as per existing Pathway processing. This also takes place for Instalment Direct Debits. It should be noted that the Rates Generation (and Water Generation) will also update the ePathway parameters for Direct Debits with the new Generation Run for Rates, Water or Special Rates/Charges accordingly.Please also refer to the Release Notes regarding the new Due Date Direct Debit Type.

ePathway General Enquiry Rates Direct Debits

InforXtreme Incident: COGC 10996957;	DRN: 30577	Fix:
SMART AND THICK CLIENT;	KB:	ERS:

NEW DIRECT DEBIT ENTRY ENHANCEMENTS

Changes have been made to support the Rates Accounting and Water Billing modules that require greater flexibility in allowing the Direct Debit functionality to extract charges correctly. Refer to the Rates Accounting release notes for more details of the enhanced functionality.

The Online Direct Debit Rates Parameters form has been changed to allow a 'Due Date' Direct Debit Type to be nominated in the Due Date Direct Debit Type field for all modules.

Changes have also been made to the functionality that allows a customer to create or amend a Direct Debit scheme to be able to create or amend a Due Date scheme.

Infomart

Enhancements

Animals_40 Stored Procedure

InforXtreme Incident: LOGN 14277857;	DRN: 31515	Fix:
	KB:	ERS:

ADDITIONAL LOGGING ADDED TO THE ANIMALS_40 PROCEDURE

An additional interim logging step has been added to the Animals_40 procedure between the initial loading of the Animal_Registrations table and the subsequent update of registration balances in that table.

Infringements

Enhancements

Hand Held Data Upload

InforXtreme Incident: PERT 12859821;	DRN: 31405	Fix: 03107336;
SMART AND THICK CLIENT;	KB:	ERS: 33313;

HAND HELD DATA UPDATE CONTROL

The Hand Held Data Update process has been enhanced to allow it to run continually, importing new files found within a specified folder.
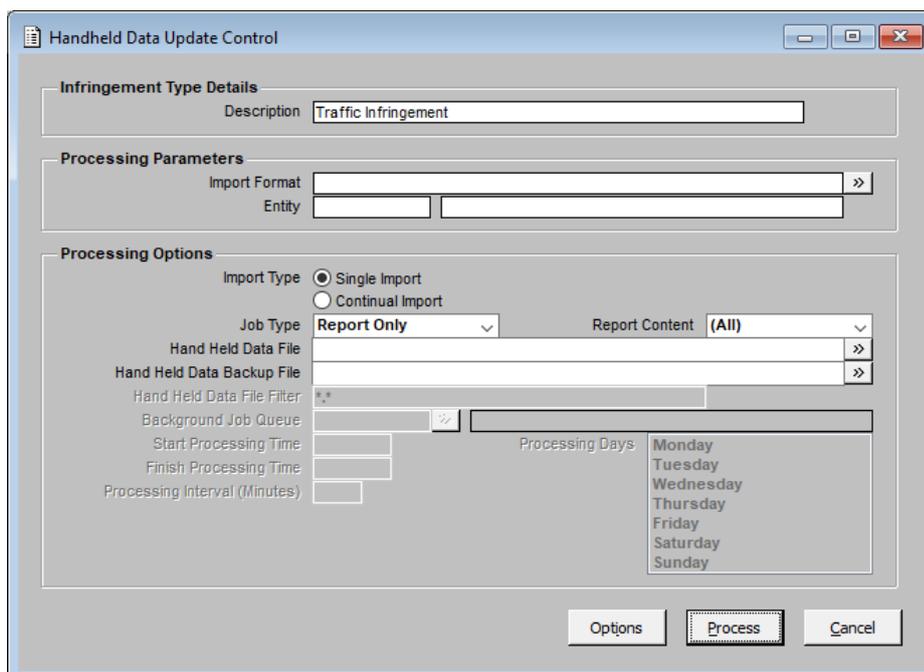
A new option called Import Type controls whether the Hand Held Update process runs continually or imports a single import file.
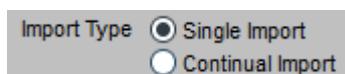
Single Import

Setting the Import Type to Single Import allows a single hand held data file to be imported into Pathway. Using the Single Import option allows the hand held import to be run as it did in prior releases of Pathway.
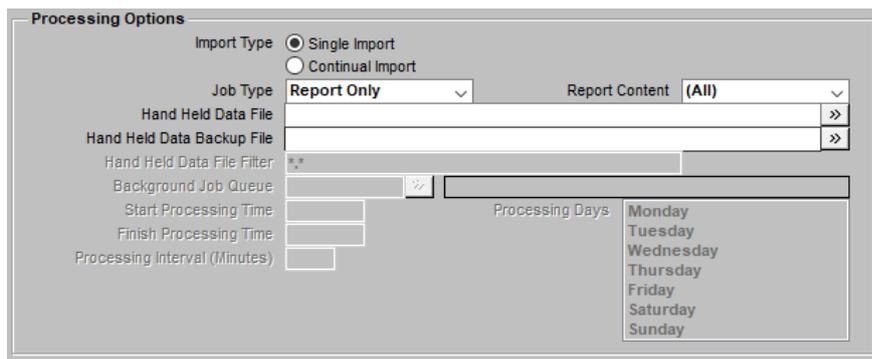
Job Type

Specifies how the job will be processed:
- Report Only – will produce a report but will not update any other details
- Update and Report – will produce a report and will also update information where necessary

Report Content
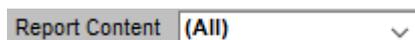
Determines the content of the report:
- All – will show all tickets that exist in the file
- Errors Only – will show the errors of the tickets that have not or will not be processed and why

Hand Held Data File

The file that will be used in the import process.

Hand Held Data Backup File

Allows a backup file to be specified for the import process. After the file has been imported it will be moved to the hand held data backup file.

Continual Import

Setting the Import Type to Continual Import allows the continual importation of hand held data files from a specified folder.

Job Type

Job Type Update and Report
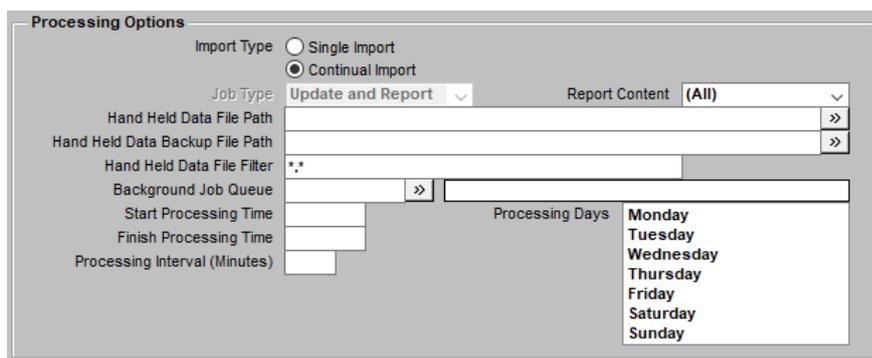
When performing a continual import, the Job Type must be   Update and Report.

Report Content

Report Content (All)

Determines the content of the report:
- All – will show all tickets that exist in the file
- Errors Only – will show the errors of the tickets that have not be processed and why

Hand Held Data File Path

Hand Held Data File Path

The path to the folder that will contain the hand held data files to be imported.

Hand Held Data Backup File Path

Hand Held Data Backup File Path

The path to the folder that will contain the hand held data files that have been processed. The hand held data backup file path must be different to the hand held data file path. When a new file is found in the hand held data file path, the file is copied to the hand held data backup file path. After the file has been imported it is deleted from the hand held data file path to prevent the file from being imported again.

Hand Held Data File Filter

Hand Held Data File Filter PARKING*.TXT

A filter can be used to restrict the files that will be processed within the specified hand held data file path. E.g. the filter PARKING*.TXT would allow processing of the file Parking_Export_20191023173201.txt but not the file Animals_20191023173201.txt.

Multiple continual Hand Held Update processes can be submitted to run over the same hand held data file path. Each of the Hand Held Update processes should have a unique hand held data file filter specified so that each process processes a distinct set of file names.

Background Job Queue

Background Job Queue

Specifies the background job queue that will be used to process the hand held import files.

Start Processing Time

Start Processing Time 06:00:00

The time of day processing should start. E.g. 6am.

Finish Processing Time

Finish Processing Time 21:00:00

The time of day processing should finish. E.g. 9pm.

Processing Interval (Minutes)

Processing Interval (Minutes)	30

The time in minutes the hand held data import will wait before checking the specified hand held data file path for new import files. E.g. 30 minutes.

Processing Days

Processing Days	Monday
	Tuesday
	Wednesday
	Thursday
	Friday
	Saturday
	Sunday

Specifies which days the hand held import process will run. E.g. it can be set to run on weekdays only.

Continual Processing

To run the Hand Held Update in continual import mode 2 separate job queues must be running.

Standard Update Queue

The first job queue that is required is the standard update queue for the Infringements module.

At the start of each day the continual import process will schedule a new batch job to run at the start of the following day. If the current days continual import process was to fail, processing would resume the following day by this newly scheduled process.
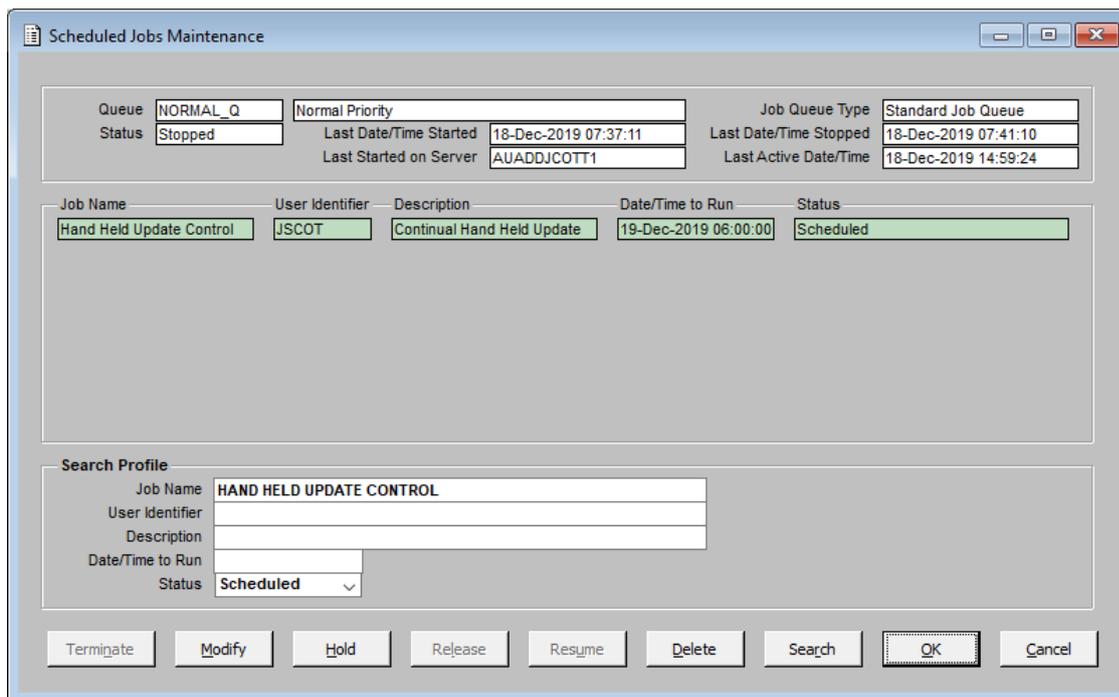
The purpose of this batch job is to schedule a new batch job for the start of the following day and commence continual import processing at regular intervals on the background job queue. This queue does not do any processing of the import files.

Background Job Queue

The second job queue that is required is a background job queue. The background job queue is specified on the Hand Held Update Control form.
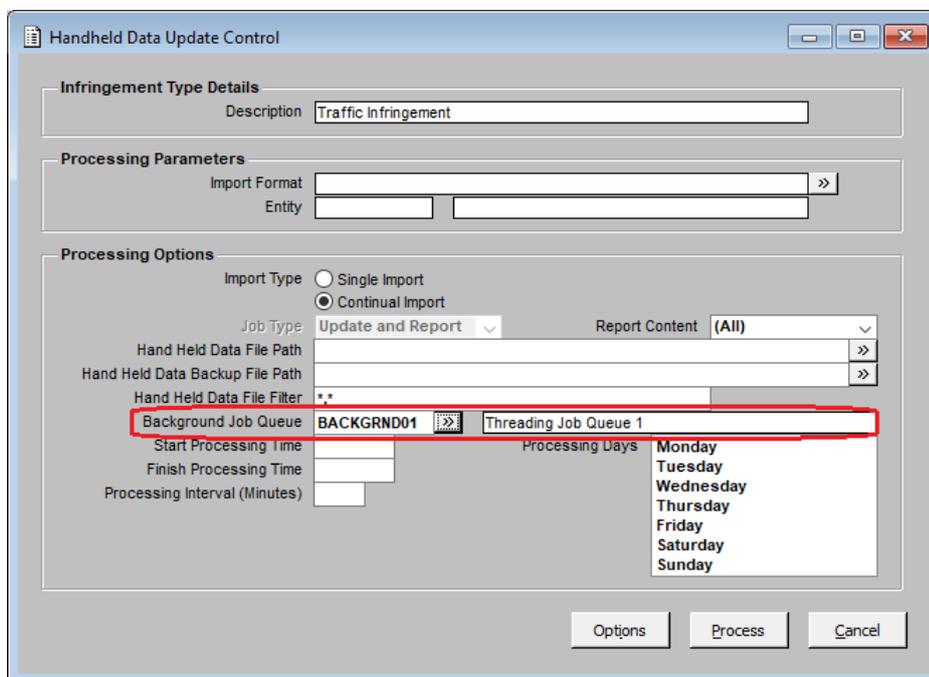
The background job queue will schedule a new job to run at the specified interval (e.g. in 30 minutes time) then start processing any available import files.
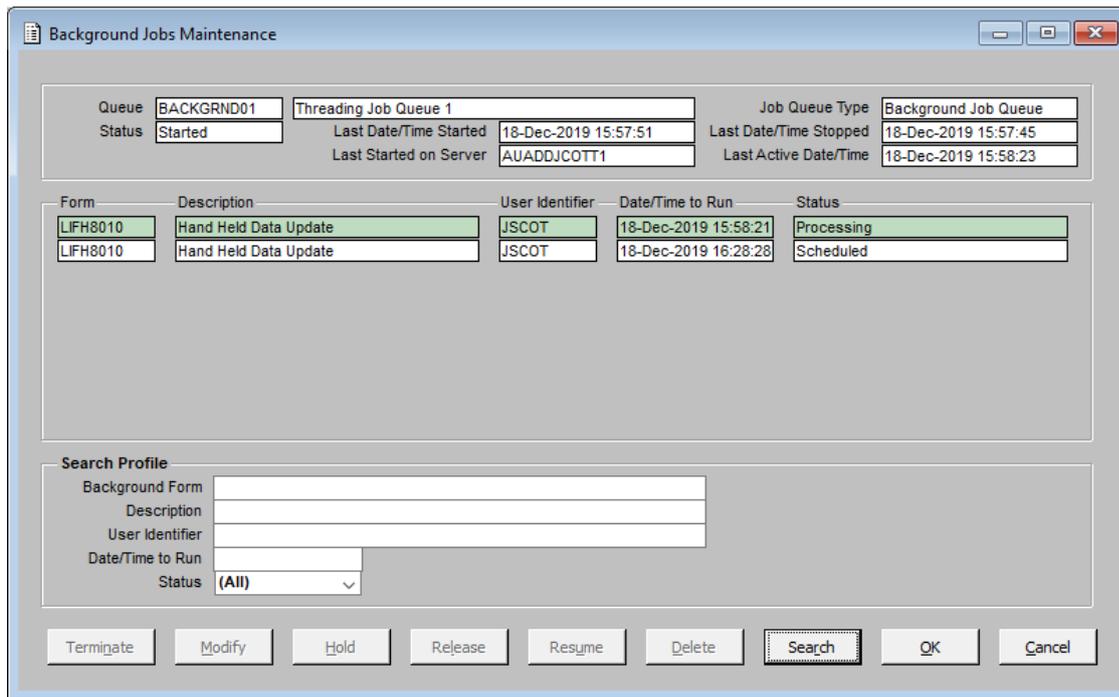
Records imported will be appended to the run number for that day. As files are imported through the day the size of the report for that day will increase.
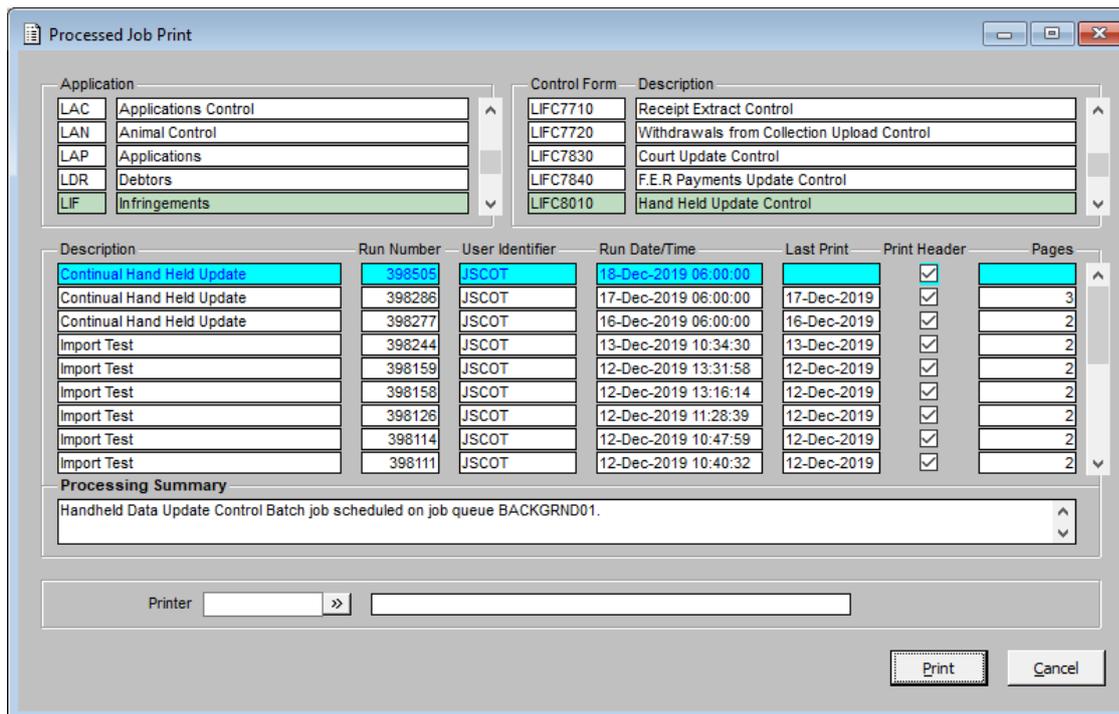
At the end of each day (when the finish processing time has been reached) a report will be sent to all email report recipients specified when the job was first submitted. The email will contain the processing summary for that day's job which will include the files imported that day and the number of records processed and the number of records with errors.

Sample Email

[PthDevMain] Hand Held Data Update

To
Cc

LIFR8010.txt
5 KB

Handheld Data Update Control Batch job scheduled on job queue BACKGRND01.

Start Processing Time: 06:00:00
Finish Processing Time: 21:00:00
Processing Interval (Minutes):   30
Processing Days: Monday,Tuesday,Wednesday,Thursday,Friday

Processed Files:
\\ADELGO01\REDEV\PATHWAY\DEV\TMP\LIF\HAND HELD DATA UPLOAD\IMPORT\Parking_Export_20191218123121.txt
\\ADELGO01\REDEV\PATHWAY\DEV\TMP\LIF\HAND HELD DATA UPLOAD\IMPORT\Parking_Export_20191218173201.txt
Total Records Processed: 2
Total Records with Errors: 2

Sample Report

```
    Form: LIFR8010                          Development Environment                              Page:      1
    User: JSCOT                        Hand Held Update Report - Errors Only             18-Dec-2019 21:04:14
                                          Continual Hand Held Update


_____

 Processing Parameters
            Infringement Type: John's PK1 Infringement Type
                Import Format: Chris' Test LRPIF04

 Continual Processing Options
                    Job Type: Update and Report                         Report Content: (All)
          Hand Held Data File Path: \\ADELGO01\REDEV\PATHWAY\DEV\TMP\LIF\HAND HELD DATA UPLOAD\IMPORT
 Hand Held Data Backup File Path: \\ADELGO01\REDEV\PATHWAY\DEV\TMP\LIF\HAND HELD DATA UPLOAD\IMPORT\BACKUP
    Hand Held Data File Filter  PARKING*.TXT
          Background Job Queue: BACKGRND01
                Processing Times: 06:00:00 - 21:00:00                   Processing Interval (Minutes): 30
                Processing Days:

    Form: LIFR8010                          Development Environment                              Page:      2
    User: JSCOT                        Hand Held Update Report - Errors Only             18-Dec-2019 21:04:14
                                          Continual Hand Held Update

   Inspector: DRAKE

 Ticket         Registration         Offence                              Offence Date Time

 197            214569               JSCOT
        Errors: Offence Type not found - JSCOT
                    ***** INFRINGEMENT COULD NOT BE CREATED DUE TO CRITICAL ERRORS WITHIN THE HAND HELD DATA *****
 198            214569               JSCOT
        Errors: Offence Type not found - JSCOT
                    ***** INFRINGEMENT COULD NOT BE CREATED DUE TO CRITICAL ERRORS WITHIN THE HAND HELD DATA *****

        Total: 2

_____

                                    --- End of Report ---
```

Cycle Function Selection Interface

InforXtreme Incident: MCKY 11148201; IPSW 11197874; SMART AND THICK CLIENT;	DRN: 30841	Fix:
	KB:	ERS: 23240;

FIRST MVR UPDATE CONTROL

Changes have been made to the MVR Update process to cater for the Queensland CITEC expanded file format. A new check box celled 'Expanded File Format' has been added to the First MVR Update Control, this option is only applicable when the State Code is set to Queensland.

When importing a file using the expanded file format, the check box 'Expanded File Format' should be checked ON.

When importing a file using the standard file format, the check box 'Expanded File Format' should be checked OFF.

The following fields have been added to the Names Maintenance form to hold the details from the expanded file format for Queensland Parking Infringements.

New fields have been added to the Vehicle Details Maintenance form to hold the details from the expanded file format.

Hand Held Data Upload

InforXtreme Incident: ATA 12773445;	DRN: 31344	Fix:
SMART AND THICK CLIENT;	KB:	ERS: 36172;

EXPORT/IMPORT FORMAT MAINTENANCE

The field ISSUEDATE has been added to the New Zealand parking Hand Held Data Upload import entity (LRPIF14). During the Hand Held Data Upload the value of this field will be copied to the Infringements issue date. If no issue date is provided in the import file, the value of the field OFNCDATE (Offence Date) will be copied to the Infringements issue date.

Inspections

Enhancements

Mobile Inspections Document Generation

InforXtreme Incident:	DRN: 31464	Fix:
SMART AND THICK CLIENT;	KB:	ERS: 32904;

MOBILE INSPECTION ADHOC EMAIL ADDRESS FOR DOCUMENT GENERATION

If the recipient roles on an Inspection do not have an email address configured, the generated document will now still be sent to the nominated Adhoc email address (directly rather than as a BCC). Prior to this change the document would not have been sent.

Licensing

Enhancements

Licensing Maintenance

| InforXtreme Incident: | DRN: 31366 | Fix: |
| THICK CLIENT; | KB: | ERS: |

LICENCE FEES POP UP

A new Fee Type column has been added to the License Fees Pop Up within the Thick Client version of Pathway. Previously, the fee type was displayed within the Description column label.
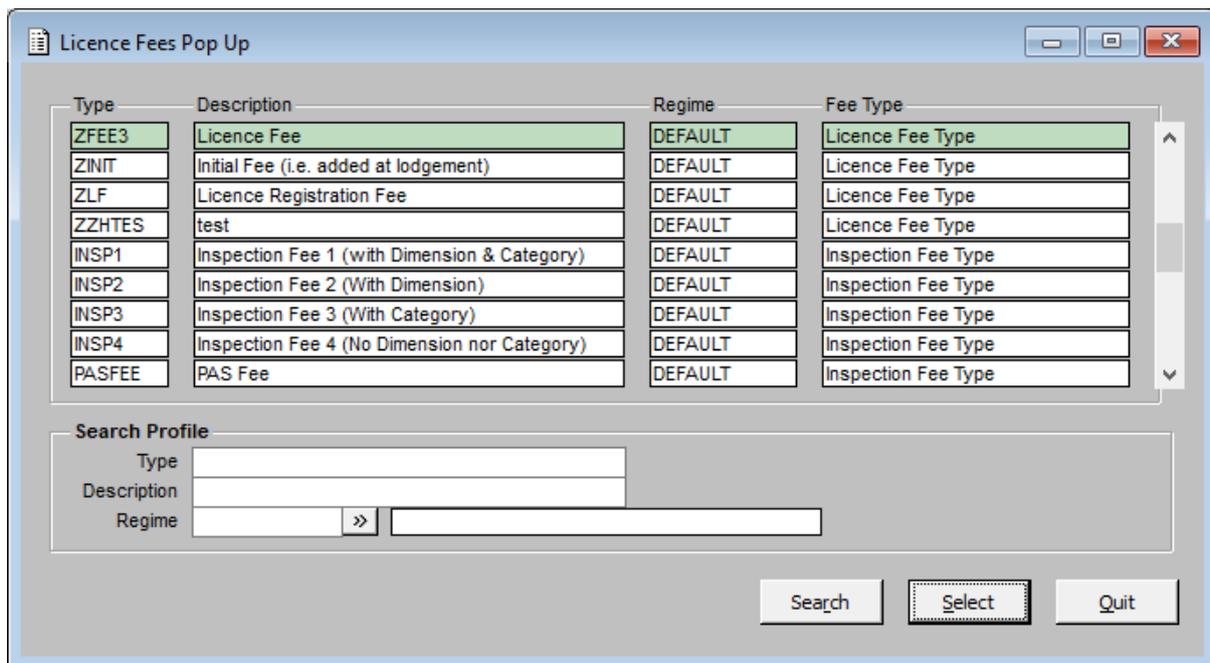
Rates Accounting

Enhancements

Community Title changed without a valuation change

InforXtreme Incident: COGC 11369239;	DRN: 30869	Fix:
SMART AND THICK CLIENT;	KB:	ERS:

The Rates Accounting and Valuation modules have been enhanced to cater for the situation where there are changes to a Community Title's structure but no change to its valuation. Changes have also been made to automatically link and de-link Assessments to a VG Number according to the structure of the Community Title that is linked to the VG.

These enhancements are only pertinent to sites using Community Titles (i.e. when the Rates 'Community Titles in use' system parameter is checked on).

VG Supplementary Rate Maintenance

This function has been enhanced to allow sites using Community Titles to be able to manually create a VG Supplementary allowing the system to cater for the situation where a Community Title has a change of Entitlement but does not have a change of valuation. This is achieved by automatically updating the manually created VG Supplementary so that it reflects the new structure and Entitlement distribution advised by a Community Title.

The following enhancements have been made to this function to cater for this requirement:
- When nominating the VG Number, if related Assessments already have Supplementary Entries in progress then a message is issued advising each Assessment Number having a Supplementary Entry and the function that created the Supplementary Entry.
- When the system is set in 'Community Titles in use' mode, when a VG Supplementary Entry is created its Valuation dates and Rateable Valuation dates will be set using the Base Dates defined in the Valuation Year and Rateable Valuation Year parameters. The Supplementary Entries created for each related Assessment will have their Valuation dates and Rateable Valuation dates set likewise.
- This form has been enhanced by the addition of the new Community Title option which is only shown when the Rates 'Community Title in Use' system parameter is On. When the VG selected is linked to a Community Title the option is bolded. Selecting this option will do the following:
    - Check if the VG is linked to a Community Title. If it is not, then an error message is shown, and the user cannot proceed.
    - If the VG's Community Title does not have an Instance of the same date as the VG Supplementary's Date Effective, then the following occurs automatically before showing the Community Title Maintenance form:
        - Checks are made for the following:
            - If the Community Title has an instance with a later date than the VG Supplementary's Date Effective then an error message is shown, and the user cannot proceed.
            - If a balanced instance does not exist for the Community Title then an error message is shown, and the user cannot proceed.
        - A new Instance for the Community Title is created for the date of the VG Supplementary's Date Effective.
        - The Community Title's latest balanced instance is copied to the newly created instance.
        - An Information message is shown advising 'An instance has been automatically created for the VG Supplementary Date Effective and loaded with the latest balanced instance details.'

- o Note: If the VG's Community Title already has an Instance of the same date then the Community Title Maintenance form is simply shown as described below.
- The Community Title Maintenance form is shown, showing all the instances for the Community Title including the automatically created instance if one was created.
- If required, the user can then update the relevant instance (the one having the same date as the VG Supplementary's Date Effective) so that it has the required details present. This could mean that Assessments are added or deleted from the structure and/or Entitlement Units (and Contribution Units if required) are changed.
- When the user returns from the Community Title Maintenance form to the VG Supplementary Rate Maintenance form the system automatically updates the VG Supplementary from the details of the latest balanced Instance, as follows:
  - o The update process caters for the Assessments that exist in the VG Supplementary but have been 'removed' from the Community Title. For these Assessments, whose Supplementary Entries form part of the VG Supplementary, their Supplementary Entry will be updated so that they do not get any share of the valuation, resulting in a zero rateable value. An Assessment can be 'removed' from the Community Title by either deleting the Assessment record from the Community Title Instance or by changing the Assessment's Entitlement Units to zero.
  - o The update process caters for Assessments that are in the Community Title Instance that are not a part of the VG Supplementary. For these Assessments, a check is done to see if any of those Assessments already have a Supplementary Entry in progress. If there are, an error message is issued advising the Assessments that have a Supplementary in progress and the function that created the Supplementary. These situations will need to be resolved by the user before the system can update the VG Supplementary from the Community Title Instance details. If an added Assessment does not have a Supplementary in progress, then one will be created and linked to the VG Supplementary. The created Assessment Supplementary will have its Valuation dates and Rateable Valuation dates set to the base date defined for the Valuation Year/Rateable Valuation Year.
  - o The entitlement percentage of each Assessment in the latest balanced Instance is loaded to the VG Supplementary so that the percentage each Assessment has of that VG Supplementary's valuation reflects that of the Community Title Instance.
  - o Once the above has been done, the following further actions are performed for each Assessment whose entitlement proportion has changed on each Assessment Supplementary within that VG Supplementary, to ensure those Supplementary Entries reflect the Community Title Instance details.
    - ▪ The Assessment's Rateable Valuation is recalculated so that it reflects the new percentages.
    - ▪ The Assessment's Supplementary Entry is checked to see if it has the correct Differential Rate Type and if not loads it. If a Differential Rate Type for the Assessment cannot be determined using the Assessment's Differential Rates details and the Differential Rate Type Matrix parameter details, then an error message is shown; this situation will need to be resolved by the user before the system can update the VG Supplementary.
    - ▪ A Supplementary Calculation is done to calculate any change of rates for the Assessment.

Community Title Maintenance

The following enhancements have been made to this function:
- When a Community Title is selected for maintenance, if it is linked to a VG that has a VG Supplementary that is in progress then the Community Title Enquiry form is shown instead of the Community Title Maintenance form, and the warning message 'The Community Title form is shown in Enquiry mode as a VG Supplementary is in progress for the related VG Number' is shown advising why this occurred.

- This function has been changed to automatically update the linking of Assessments to a VG Number to reflect that of the related Community Title's latest Instance's set of Assessments. This occurs when the user has maintained the Assessments within the Community Title Structure Maintenance form and the Save button is pressed; the processing occurs as follows:
    - A check is made to see if Assessments in the latest Instance are currently linked to a different VG, and if so, an error message will be shown. This situation needs to be resolved by the user before changes can be accepted.
    - Each Assessment in the latest Instance that does not have its Entitlement Units set to zero ('0') is checked to see if the Assessment has a Current link to the Community Title's VG. If it does not, one will be put in place by either creating a new link or changing the existing Historic link to Current. Note: An Assessment having an empty value in its Entitlement Unit is linked to the VG; this caters for the need to have the sole Parent header Assessment to be Currently linked to the VG.
    - Each Assessment that has a Current link to the VG is checked to identify which of those Assessments are not in the Instance or whose Entitlement Units has a zero value ('0'). If any of these are found the link is updated to be Historic.

Valuation Maintenance

This function has been enhanced so that when a change to the Community Title for a VG Number occurs, the links between the VG Number and Assessments are updated to reflect that change, as follows:

If a Community Title is not currently nominated and one is selected:
- If the Community Title has a balanced instance(s) the latest one is used. Each Assessment of that latest balanced instance is checked to see if it is currently linked to another VG Number, and if so, an error message is issued advising the Assessment Numbers that are linked to another VG Number.
- If no errors were detected, then each Assessment for the latest balanced instance is linked to the VG Number, with the Status Date set to the Instance Date of the latest balanced instance.
- If the Community Title does not have a balanced instance no attempt is made to link Assessments to the VG Number.

If a Community Title has already been nominated for a VG Number, and if that Community Title is removed from the VG Number or changed to be another Community Title, the Assessments that are currently linked to the VG Number are changed so that they are no longer linked to the VG Number.

VG Number Link Maintenance

This form, accessible by using the VG Numbers option on the Assessment Summary form, has been changed so that it does not force a VG Number to be nominated for the Assessment when the Rates 'Community Title in use' system parameter is On.

VG Update

Enhancements, which are only relevant when the Valuation module has the 'Allow VG Update to create Supplementaries' system parameter set on, have been made to this function.
Changes have been made so that an in-progress VG Supplementary can be updated from the DNRM file in certain situations, as follows. The VG Update checks if the change of valuation date advised in the DNRM file matches the Date Effective of the in-progress VG Supplementary. If it does match, then the new value from the DNRM file is loaded to the in-progress VG Supplementary (replacing any previous 'new value' that was there) and recalculations done to reflect the latest new value. This occurs even if the in-progress VG Supplementary already contained a change of value. If the date does not match, then an exception message like 'Details for the VG can't be loaded. A VG Supplementary is already in progress but it cannot be updated as the valuation change date of xx/xx/xxxx doesn't match the VG Supplementary Date Effective of xx/xx/xxxx is issued, and the VG Supplementary is not updated.

Enhancements have also been made for the situation when this function creates a VG Supplementary. Original functionality was such that, before the VG Supplementary was created a check was done to determine if there were any in-progress Assessment Supplementaries for any of the Assessments linked to the VG. These Assessment Supplementaries could have been created by any number of functions including a Property Transfer or a WasteEdge import etc. When this occurred an exception message was issued and the VG Supplementary was not created. Enhancements have been made to the exception message so that it advises the Assessment Numbers of all the assessments that have an in-progress Assessment Supplementary and which function created them. Manual intervention is required to cater for this situation.

Other

The following functions have been changed to enable the system to know which functions created a Supplementary Entry:
- Waste Rate Type Verification
- Differential Rate Type Verification
- VG Update
- Supplementary Rate Maintenance
- Property Transfer
- Supplementary Rates Import

New Direct Debit functionality

InforXtreme Incident: COGC 10996957;	DRN: 30577	Fix:
SMART AND THICK CLIENT;	KB:	ERS:

NEW DIRECT DEBIT FUNCTIONALITY

Overview

Enhancements have been made to the Direct Debit functionality so that charges raised by functions other than the Rates Generation (e.g. Supplementary Rates) can be catered for. This means that multiple payments can be catered for when they are used. For example, the first extraction could be for the rates raised by Rates Generation and then later rates raised by a Supplementary Generation (or any other function) could be extracted. This has been achieved by introducing a new type of Direct Debit called 'Due Date'.

If a Due Date Direct Debit Type is in place for an Assessment and a Direct Debit Extraction is run, then any amount due on the date being extracted for, regardless of what function raised the charge or its Generation Run, will be extracted.

The Due Date Direct Debit Type has been introduced to provide the required flexibility and as such is envisaged as a replacement for the existing Current and Nett Direct Debit Types and their underlying functionality. It is proposed that the Current and Nett Direct Debit Types will be made obsolete in a future release. All sites should check if the new Due Date Direct Debit type meets their requirements and if so, should use the new Due Date type instead of the Current or Nett types. Please advise Infor if the Due Date Direct Debit Type does not meet your requirements. Please refer to the 'Converting existing Current/Nett Direct Debits to Due Date Direct Debits' section below for other information concerning the conversion.

Direct Debit Type Maintenance

A Direct Debit Type of 'Due Date' can now be selected.

Direct Debit Maintenance

The Direct Debit Maintenance form has been enhanced to cater for the new 'Due Date' Direct Debit type. When a Due Date Direct Debit Type is selected the Generation Run is not relevant and therefore the field is not available for selection.

Assessment Pay By Date Maintenance

This Assessment Pay By Date Maintenance form has been enhanced so that if an Assessment Pay By Date is extended and the Assessment has an 'active' Due Date Direct Debit (not Suspended) then that Direct Debit will be 'reset'. This next time the Direct Debit Extraction it is run, the reset will cause the Assessment's transactions to be examined to determine when the next set of debt is due, therefore allowing the Direct Debit Extraction function to extract the correct amount for the date range nominated.

Generation Run Maintenance

The Generation Run Maintenance form has been enhanced to detect if an existing Generation Run has its Pay by Date changed. If so, and Direct Debits are in use, a hidden flag is set within the system to advise it that this has occurred. When the Rates Accounting Direct Debit Extraction function is next run for the Rates or Water Billing or Special Rates and Charges applications, it checks this flag. If it is on, every Due Date Direct Debit linked to Assessments where the Direct Debit Status is Created, Extracted or Updated, will have their details reset so that the Extraction process will redetermine when debts are due so that they are extracted correctly.

Direct Debit Extraction

This Direct Debit Extraction from has been enhanced to cater for the new Due Date Direct Debit Type. It now allows the system to cater for an Assessment having multiple debts being due on different dates. For example, one extraction could be for the rates raised by the Rates Generation and then later rates raised by a Supplementary Generation (or any other function) could be extracted.

If a Due Date Direct Debit is in place for an Assessment and a Direct Debit Extraction is run, then the Assessment's transactions are examined to determine when the next set of debt is due, therefore extracting the correct amount for the date range nominated.

<u>Rates Generation Update</u>

This Rates Generation Update has been enhanced to cater for Due Date Direct Debit Types. It resets the Direct Debit Date Range and sets the Direct Debit's Status to 'Created'.

<u>Direct Debit Recalculation</u>

Enhancements have been made to the Direct Debit Recalculation function to cater for creating a Due Date Direct Debit Type.

<u>Other functions</u>

The following functions have also been enhanced to cater for the new Due Date Direct Debt Type.
- If Direct Debits are in use, any function that creates a relevant debit transaction for an Assessment will trigger the Direct Debit Extraction function, the next time it is run, to check if that Assessment has an amount that should be extracted.
- External Receipt Import.

<u>Converting existing Current/Nett Direct Debits to Due Date Direct Debits</u>

If it is found that the functionality provided by the new Due Date Direct Debit Type meets Council requirements, and can be used instead of using existing Current or Nett Direct Debit Types, one of the following two things can be done:

1. Manually change the existing Current and Nett Direct Debit Types to be Due Date types. This can be done by accessing the Direct Debit Type Maintenance option and changing the Type from Current/Nett to Due Date. After that has been done the system will treat all the original Current/Nett Direct Debits for Assessments as a Due Date Direct Debit. Those Direct Debits will no longer display the Generation Run field.
2. Keep a history of the Direct Debits as they currently exist and create new Due Date Direct Debits as replacements for the existing Current/Nett Direct Debits. To help achieve this a conversion form has been provided.

The conversion form:

Running this conversion causes each active (Created, Extracted or Updated) Direct Debit of the nominated Current/Nett Direct Debit Type to be processed. In doing so it:

- Creates a duplicate record of that record and sets the new record to the nominated Due Date Direct Debit Type.
- Changes the original record to Historic.

At the end of processing it sets the Active flag of the nominated Current/Nett Direct Debit Type Parameter Off so that it is no longer available for selection when creating new Direct Debits.

Before the conversion program is run in Production, it is highly recommended that it is run in a non-Production environment first. The data in the non-Production environment should match the data in Production as closely as possible. It is also recommended that before running the conversion program in Production that a backup of the data is taken.

Running the conversion form:

1. Start a thick client session.
2. Sign on the Pathway environment as SCASYS.
3. Select the drop-down menu option Tools → Run.
   The Run Form option will be displayed.

4. Enter the form LCVG1710 and press Process.
    The 'Convert scheme to Due Date scheme' form will be displayed:

5. Nominate the Rates Application concerned and enter the Current or Nett Direct Debit Type that is
    to be replaced. Enter the Due Date Direct Debit Type that is being used as the replacement type.

6. Pressing Process will cause the conversion process to run. The progress is shown in the
    message line.

7. The message frame will be displayed automatically when the process has completed advising the
    following:
a) The number of Current/Nett Direct Debits that have been made Historic.
b) The number of replacement Due Date Direct Debit Types that have been created.
c) The Current/Nett Direct Debit Type that has been made inactive.

The message frame can also be viewed by selecting the drop-down menu option View → Message
Frame.

Example Message Frame:
          ===================================
           Convert scheme to Due Date scheme
          ===================================

          Number of Current/Nett schemes made Historic: 12
          Number of Due Date schemes created: 12

          The RANETT Direct Debit Type has been made Inactive

          =============== End of Report ====================

Transactions and General Ledger

InforXtreme Incident: COGC 13562589;	DRN: 31437	Fix:
SMART CLIENT;	KB:	ERS:

VARIOUS

The following enhancements are now in effect when the "Posting Period Allocation Method" Rates system parameter is set to "Generation Run Notice Date and Transaction Effective Date".

1. Actual Discount (DISC) Transactions now have their Transaction Date set to the date from which the discount is effective.
    Scenario 1:
    When Discount is created upon the entry of a receipt the Discount Transaction Date is set to the Receipt Date. Subsequently the Date on General Ledger transactions (DATCFITRAN) raised for the Discount, is also set to the Receipt Date.
    Scenario 2:
    When Discount is created by the Rates Generation Update because there is sufficient existing credit, the Discount Transaction Date is set to the Transaction Date nominated on the Rates Generation control form. Subsequently the Date on General Ledger transactions (DATCFITRAN) raised for the Discount, is also set to the Transaction Date nominated on the Rates Generation control form.
2. The Date on General Ledger transactions (DATCFITRAN) raised that relate directly to the apportionment or un-apportionment of a Receipt to or from another transaction is set to the Receipt Date. This is the case regardless of the scenario that causes the apportionment or un-apportionment to occur.
3. The Date on General Ledger transactions (DATCFITRAN) raised that relate directly to the apportionment or un-apportionment of a Receipt Reversal to or from another transaction is set to the Receipt Reversal Date. This is the case regardless of the scenario that causes the apportionment or un-apportionment to occur.

Assessment Maintenance

InforXtreme Incident: ADEL 14317656;	DRN: 31526	Fix:
THICK CLIENT;	KB:	ERS: 52398;

RENTAL ASSESSMENT MAINTENANCE

An enhancement has been made to the Rental Assessment Maintenance form. The Floor Number now has a maximum of 99 instead of 31.

Receipting

Enhancements

External Receipt Import

InforXtreme Incident: COGC 13562589;	DRN: 31437	Fix:
SMART CLIENT;	KB:	ERS:

EXTERNAL RECEIPT IMPORT CONTROL

The External Receipt Import has been enhanced to allow the nomination of a Bank Statement Date for Reversals when importing a batch of receipts.

If a date is nominated it will be visible as the "Reversal Date" on the External Receipt Selection form accessed via Receipting >> External Receipts >> Process External Receipts when the Details grid button is used. And it will be used as the Receipt Reversal Date for any receipt reversals contained in the Batch. Hence it will also be used to set the Date (DATCFITRAN) on General Ledger transactions raised for the Receipt Reversal.

Smart Mobile Core

Enhancements

Smart Mobile Communication Fields

InforXtreme Incident:	DRN: 31412	Fix:
	KB:	ERS: 12710; 19798;

PHONE AND EMAIL HYPERLINKS

Phone and Email fields in the Customer Service, Inspections and Animals apps now appear as links so users are able to click them to trigger phone calls/emails.

Smart Mobile Questionnaire Attachments

InforXtreme Incident:	DRN: 31461	Fix:
	KB:	ERS:

QUESTIONNAIRE ATTACHMENTS

Attachments can now be associated with questions within questionnaires. There are 2 new config options (displayQuestionAttachments and questionnaireAttachmentDescripitionPrefix) which allow you to configure Attachments per question.

Smart Mobile CityWatch

Enhancements

Smart Mobile CityWatch s

InforXtreme Incident: COGC 12834872;	DRN: 31220	Fix:
	KB:	ERS:

REMOVED DETAIL FROM ERROR MESSAGES

Certain error messages in CityWatch contained unnecessary debugging code and server configuration detail.

Smart Mobile WebService

InforXtreme Incident: COGC 13183181;	DRN: 31280	Fix:
	KB:	ERS:

MOBILITY WEBSERVICE API SPECIFICATION

The Mobility WebService API Specification can no longer be viewed in a Web Browser.

Smart Mobile CityWatch Bookings

InforXtreme Incident: HORN 13223475; SMART AND THICK CLIENT;	DRN: 31275 KB: 2052295;	Fix: ERS:

DATA ALIGNMENT WITH EPATHWAY

Previously CityWatch Bookings populated the ePathway Bookings with only the basic initial Booking details. Changes have been made to ensure the Bookings rowin the ePathway database is updated upon the booking email creation, so that it reflects the details of the final booking.

This includes the following:
- Updating the temporary booking number with the final assigned number
- Ensure the offline reference for the generated receipt is the same as ePathway (i.e. BK-nnnnn, where nnnnn is the tables Booking.BookingId)
- Updating each of the fields within the Xml field including dates and times.
- Ensuring the DocumentSource field is "M" for mobile bookings and "E" for ePathway

Smart Mobile CityWatch Security

InforXtreme Incident: COGC 12834872;	DRN: 31219	Fix:
	KB:	ERS:

RESET SESSION ID'S

To address a session fixation security vulnerability, the asp.net SessionID is now reset every time a user logs in or out of CityWatch.

Smart Mobile Customer Service

Enhancements

Smart Mobile Customer Service Module Links

InforXtreme Incident:	DRN: 31415	Fix:
	KB:	ERS: 12671;

DETAILS BUTTON ON MODULE LINKS

CNA-Name and LPA-Property module links now include a 'Details' button which displays additional information on the name or property.

Smart Mobile Customer Service New Request

InforXtreme Incident:	DRN: 31420	Fix:
	KB:	ERS: 19138; 9668;

SAVE AND EDIT BUTTON ADDED

There is a new 'Save and Edit' button on the Create New Request page that allows editing of the Request immediately rather than having to search for it first.

Smart Mobile Inspections

Enhancements

Smart Mobile Inspections Date

InforXtreme Incident:	DRN: 31423	Fix:
	KB:	ERS: 12435;

INSPECTION DATE PROMPT

When an Inspection is saved that has an Inspection Date other than the current date, a confirmation prompt will now be displayed.

Smart Mobile Inspections Search

InforXtreme Incident:	DRN: 31430	Fix:
	KB:	ERS: 19222;

DEFAULT STATUS VALUE

The default Status value is now 'Incomplete' on the Smart Mobile Inspections Search form.

Valuations

Enhancements

Bulk Rental Assessment Import/Calculation Control

InforXtreme Incident: ADEL 14317656;	DRN: 31526	Fix:
THICK CLIENT;	KB:	ERS: 52398;

BULK RENTAL ASSESSMENT IMPORT/CALCULATION CONTROL

An enhancement has been made to the Bulk Rental Assessment Import/Calculation when performing an import. The Floor Number now has a maximum of 99 instead of 31.

Water Billing

Enhancements

New Direct Debit functionality

InforXtreme Incident: COGC 10996957;	DRN: 30577	Fix:
SMART AND THICK CLIENT;	KB:	ERS:

NEW DIRECT DEBIT FUNCTIONALITY

Overview

Enhancements have been made to the Direct Debit functionality so that charges raised by functions other than the Water Billing Generation can be catered for. This means that multiple payments can be catered for when they are used. For example, the first extraction could be for the charges raised by the main Water Billing Generation and then later the charges raised by an extra Water Billing Generation (or any other function) could be extracted. This has been achieved by introducing a new type of Direct Debit called 'Due Date'.

If a 'Due Date' Direct Debit type is in place for an Assessment and a Direct Debit Extraction is run, then any amount due on the date being extracted for, regardless of what function raised the charge or its Generation Run will be extracted.

The Due Date Direct Debit Type has been introduced to provide the required flexibility and as such is envisaged as a replacement for the existing Current and Nett Direct Debit Types and their underlying functionality. It is proposed that the Current and Nett Direct Debit Types will be made obsolete in a future release. All sites should check if the new Due Date Direct Debit type meets their requirements and if so, should use the new Due Date type instead of the Current or Nett types. Please advise Infor if the Due Date Direct Debit Type does not meet your requirements. Please refer to the 'Converting existing Current/Nett Direct Debits to Due Date Direct Debits' section below for other information concerning the conversion.

Direct Debit Type Maintenance

A Direct Debit Type of 'Due Date' can now be selected.

Direct Debit Maintenance

The Direct Debit Maintenance form has been enhanced to cater for the new 'Due Date' Direct Debit type. When a Due Date Direct Debit Type is selected the Generation Run is not relevant and therefore the field is not available for selection.

Assessment Pay By Date Maintenance

This Assessment Pay By Date Maintenance form has been enhanced so that if an Assessment Pay By Date is extended and the Assessment has an 'active' Due Date Direct Debit (not Suspended) then that Direct Debit will be 'reset'. This next time the Direct Debit Extraction it is run, the reset will cause the Assessment's transactions to be examined to determine when the next set of debt is due, therefore allowing the Direct Debit Extraction function to extract the correct amount for the date range nominated.

Water Billing Generation Update

This Water Billing Generation Update has been enhanced to cater for Due Date Direct Debit Types. It resets the Direct Debit Date Range and changes the Direct Debit's Status to 'Created'.

Other

The following functions have also been enhanced to cater for the new Due Date Direct Debt Type:
- If Direct Debits are in use, any function that creates a relevant debit transaction for an Assessment will trigger the Direct Debit Extraction function, the next time it is run, to check if that Assessment has an amount that should be extracted.
- External Receipt Import.

Converting existing Current/Nett Direct Debits to Due Date Direct Debits

If it is found that the functionality provided by the new Due Date Direct Debit Type meets Council requirements, and can be used instead of using existing Current or Nett Direct Debit Types, one of the following two things can be done:

1. Manually change the existing Current and Nett Direct Debit Types to be Due Date types. This can be done by accessing the Direct Debit Type Maintenance option and changing the Type from Current/Nett to Due Date. After that has been done the system will treat all the original Current/Nett Direct Debits for Assessments as a Due Date Direct Debit. Those Direct Debits will no longer display the Generation Run field.
2. Keep a history of the Direct Debits as they currently exist and create new Due Date Direct Debits as replacements for the existing Current/Nett Direct Debits. To help achieve this a conversion form has been provided.

The conversion form:

Running this conversion causes each active (Created, Extracted or Updated) Direct Debit of the nominated Current/Nett Direct Debit Type to be processed. In doing so it:
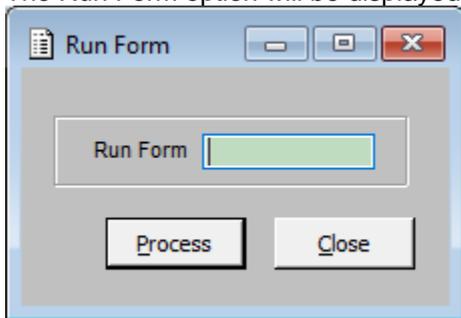
• Creates a duplicate record of that record and sets the new record to the nominated Due Date Direct Debit Type.
• Changes the original record to Historic.

At the end of processing it sets the Active flag of the nominated Current/Nett Direct Debit Type Parameter Off so that it is no longer available for selection when creating new Direct Debits.
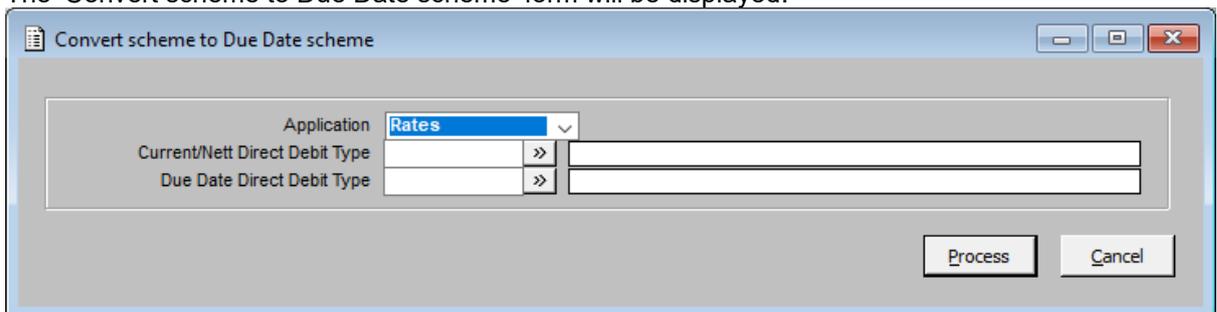
Before the conversion program is run in Production, it is highly recommended that it is run in a non-Production environment first. The data in the non-Production environment should match the data in Production as closely as possible. It is also recommended that before running the conversion program in Production that a backup of the data is taken.

Running the conversion form:

1. Start a thick client session.
2. Sign on the Pathway environment as SCASYS.
3. Select the drop-down menu option Tools → Run.
   The Run Form option will be displayed.

4. Enter the form LCVG1710 and press Process.
   The 'Convert scheme to Due Date scheme' form will be displayed:

5. Nominate the Rates Application concerned and enter the Current or Nett Direct Debit Type that is to be replaced. Enter the Due Date Direct Debit Type that is being used as the replacement type.

6. Pressing Process will cause the conversion process to run. The progress is shown in the message line.

7. The message frame will be displayed automatically when the process has completed advising the following:
a) The number of Current/Nett Direct Debits that have been made Historic.
b) The number of replacement Due Date Direct Debit Types that have been created.
c) The Current/Nett Direct Debit Type that has been made inactive.

The message frame can also be viewed by selecting the drop-down menu option View → Message Frame.

Example Message Frame:

```
    ==================================
     Convert scheme to Due Date scheme
    ==================================

    Number of Current/Nett schemes made Historic: 12
    Number of Due Date schemes created:        12

    The RANETT Direct Debit Type has been made Inactive

    =============== End of Report ===================
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Infor Xtreme Incident Index

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