Pathway
RELEASE NOTES

Enhancements

3.10.019

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Pathway Release 3.10.019

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Introduction

This document describes enhancements and new functionality made available in Release 3.10.019 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 3.10.019 Enhancements.pdf
- Infor Pathway Release Notes 3.10.019 Fixes and Software Corrections.pdf
- Infor Pathway Release Notes Summary 3.10.019.xlsx

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

UX Client Static Web File Caching

Incident:	DRN: 31746	Fix: 03107508
UX CLIENT	KB:	ERS:

The UX client contains static files that do not need to be retrieved for each page load and can be cached on the client machine. This update ensures that these files are cached on the client machine to reduce the number of requests sent over the network to the server.

Analyse Results drill through

Incident:	Work Item: 45333	Fix:
UX Client	KB:	ERS:

The Analyse Results data grid that is available on all UX client Search Forms now allows for a user to double click on a row to drill through to the record.

System

Incident:	Work Item: 51540	Fix:
UX Client	KB:	ERS:

INPUT CAPABILITY TO SELECTORS

The following forms have been changed to enable 'selector' fields to be input capable.

Miscellaneous Receipt Allocation Line Maintenance - "Transaction Type" Selector
Receipting >> Receipt Entry.
Enter an Application of RC and press Add Line or use the Details button for an existing RC line.

Crown Tenure Maintenance/Enquiry - "Responsible Identity" Name Selector
Property Administration >>Crown Tenure Maintenance/Enquiry.
Search for and modify a Crown Tenure or add a new Crown Tenure.

Resizing the Last Column in a Data grid

Incident: BALL 14881489	Work Item: 52018	Fix:
UX Client	KB:	ERS:

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

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

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

Print Multiple Reports

Incident: BALL 14933068	Work Item: 52886	Fix:
UX Client	KB:	ERS:

PRINT MULTIPLE REPORTS

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

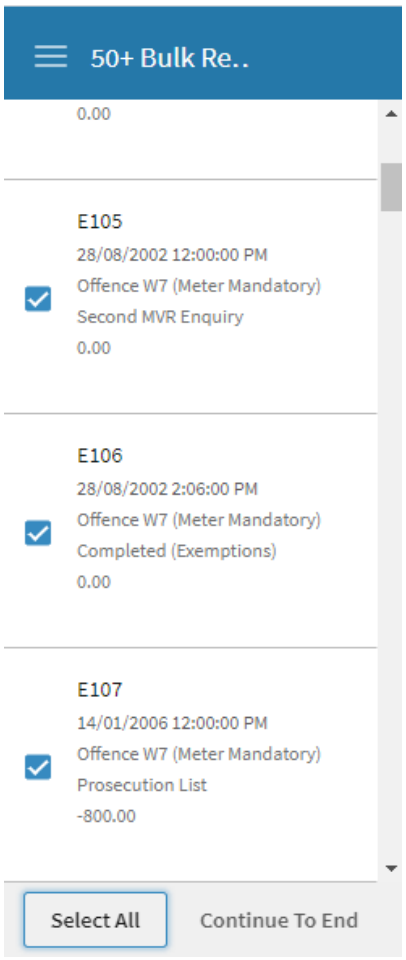
This new functionality will allow UX users to print or download any of the generated reports by simply clicking on the reports tab and then clicking the **Print** or **Download** button.

Search Profile Results

Incident: ATA 15198186	Work Item: 54659	Fix:
UX Client	KB:	ERS:

SELECT ALL

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



Applications

Enhancements

Application Maintenance

Incident: COGC 14128242	DRN: 31499	Fix:
UX CLIENT	KB:	ERS:

NEW PARAMETER TO CONTROL UPDATING OF THE APPLICATION EXPIRY DATE FROM THE CONSENT EXPIRY DATE

A new parameter has been made available to allow a site to choose, for a Consent Type, if the Application's Expiry Date is to be updated from the Consent's Expiry Date.

The new 'Update Application Expiry Date' parameter can be set in the Consent Maintenance parameter form (accessed from the Applications>> Application Parameters menu option, selecting the Consent option).

Having the parameter checked On will cause the Application's Expiry Date to be set from the Consent Expiry Date when it is set in the Application's Consent Maintenance form. Set ON retains the existing functionality. The upgrade will set the flag ON.

If the parameter is Off the Application's Expiry Date will not be updated.

Application Maintenance

Incident: COGC 14301272	DRN: 31518	Fix:
UX CLIENT	KB:	ERS:

INVOICE PRINT FUNCTION

An enhancement has been made to the Invoices Print Function. Previously, Invoices printed manually via the Invoice Print Function would be printed again by the Bulk Invoices Print function. Invoices printed manually by the Invoice Print Function will now be ignored by the Bulk Invoices Print function.

Application/License Fee Report

Incident: BALL 14904610	Work Item: 52345	Fix:
UX Client	KB:	ERS:

APPLICATION TYPE NO LONGER MANDATORY

The Fee Report previously required an application or license type to be supplied to allow the report to be produced. This requirement has been removed and the report can show fees on multiple types.

The form has also been corrected so that a profile on the fees can now be saved and used later.

Customer Service

Enhancements

Questionnaire Clear button

Incident: TWOM 14591165, TWOM 14693473	Work Item: 47903	Fix:
UX Client	KB:	ERS:

QUESTIONNAIRES

The **Clear** button for questionnaires found in the Animal and Request modules has been moved from the bottom of the form and placed in the header of the form with the **Save** and **Undo** buttons.

Request Maintenance

Incident:	Work Item: 54275	Fix: 03107521
UX and Smart Clients	KB:	ERS:

MAPPING ACR REFERENCES WITH NAR

For Customer Requests lodged by ePathway the Surname and Given Names are now populated into the name search, and NAR is automatically searched. Additionally, communication details can be automatically populated if a new name needs to be created, or communication details are automatically updated if an existing matched name is linked to the request and saved, based on ePathway Customer Request mapping configurations.

The customer request field mapping can be found in System Administration>>ePathway>>Customer Request Parameters>>Customer Request Field Maintenance>>Mapping Maintenance.

E-mailing

Enhancements

E-mail Message Maintenance

Incident: COGC 14070821 SMART CLIENT UX CLIENT	DRN: 31479 KB:	Fix: ERS:

E-MAIL MESSAGE SEARCH PROFILE

A **Resend** button has been added to the e-Mail Message Search Profile form, accessible from the System Administration >> System Parameters >> E-mail Message Maintenance menu option in the smart client. The button enables multiple messages, selected from the multi-select enabled search results grid, to be resent at one time. This is useful, in the event of a mail server failure. The equivalent Pathway UX client function has been given a new bulk option for the same purpose. Please note that the submitting user may not be aware of any errors on the resend operation unless they enquire on the resent messages, or examine the contents of the application server log file.

The handling of message attachments has been improved to ensure the integrity of resend operations, especially in environments with multiple application servers. Where attachment information has been removed for older messages, resend operations will be unsuccessful, and an error message will appear in the server log.

ePathway System

Enhancements

ePathway Styling

Incident:	DRN: 31748	Fix:
	KB:	ERS:

EPATHWAY STYLING ENHANCEMENTS

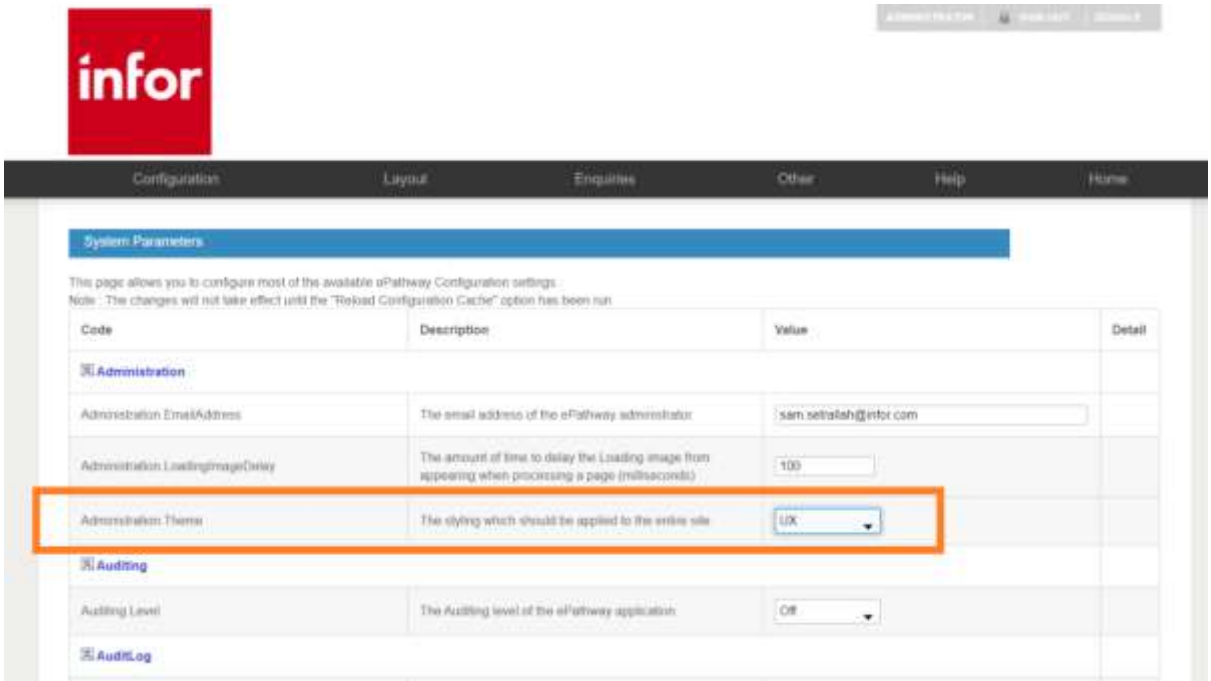
As part of Infor's continued effort to improve user experience we have introduced various styling and feature enhancements to ePathway. This styling adopts the latest Infor Design System (SoHo) UX standards.

The main areas targeted are:

- Council Services layout with new default images
- Register & Sign In/Out buttons
- Dynamic forms using an accordion style control
- Validation/Error messaging displayed in popups
- Loading spinner control
- Property Search tab view controls
- Date time Picker
- Fonts, colours & layout
- Red border for missing mandatory fields (on dynamic forms)
- Stage breadcrumbs removed

The latest out-of-the-box styling can be switched on in ePathway System Parameters. For example, customer may switch Theme from 'Default' to 'UX':

Configuration -> System Parameters -> Administration.Theme

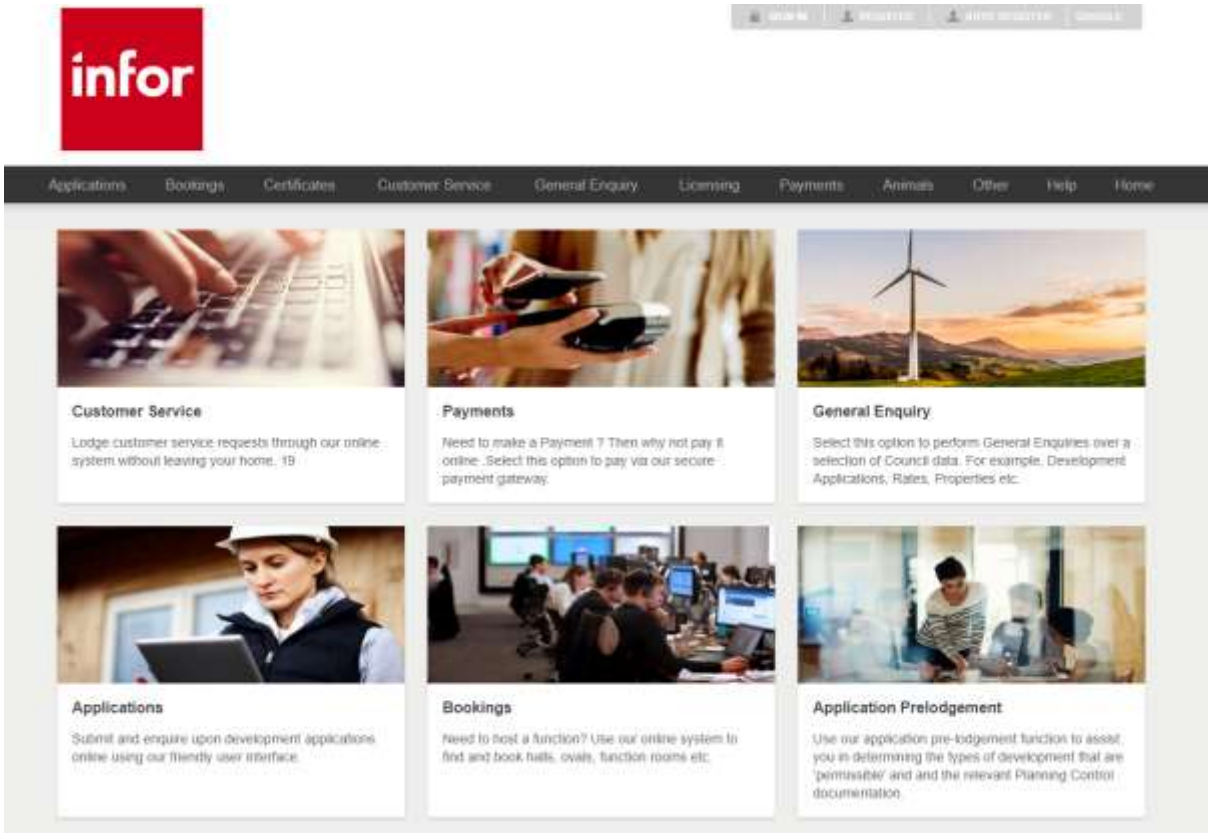


It is recommended that customers thoroughly test this new Pathway UX style in a Test / Training environment to ensure compatibility between Infor's Pathway UX style and the customer's own

customised styles. Please note that the customisable stylesheet (i.e. Styles.css) is found in the ePathway Web folder.

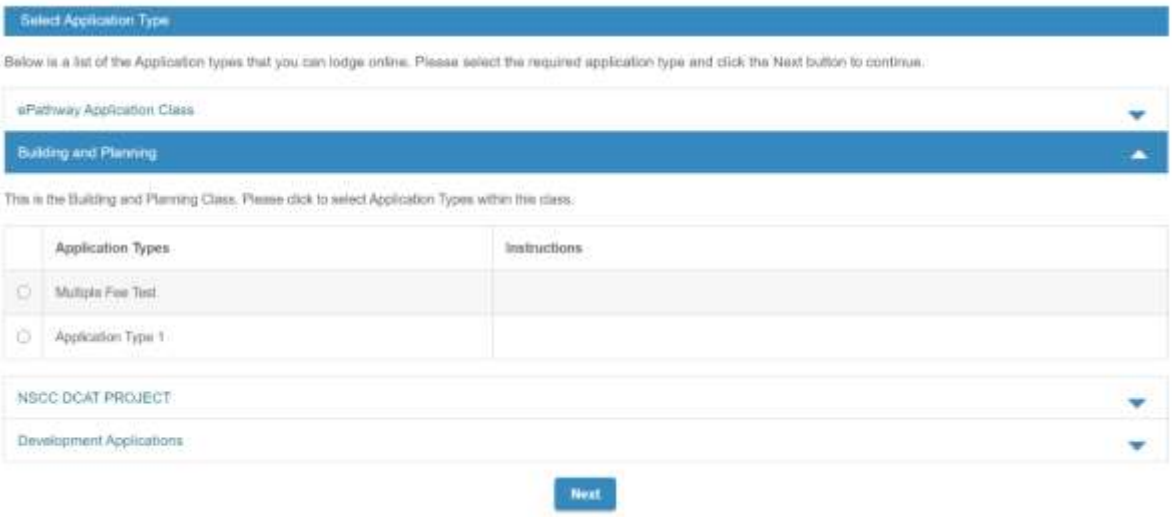
If additional changes are required, it is possible for those with HTML/CSS experience to copy / append sections of the new ..\Web\Styles.UX.css file into the ..\Web\Styles.css file (on web server) and make any required changes. This method will ensure that any changes don't get overwritten for future software upgrades.

Council Services Layout:

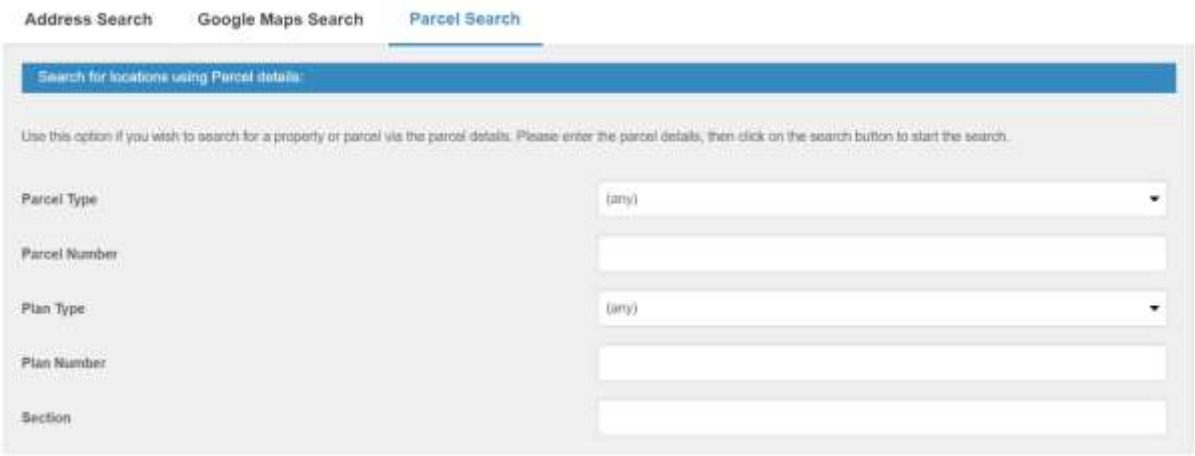


Note: Council Services options are configurable in the *Layout -> Council Services* administration parameters. Customers may use our images or their own images however it should be noted that if using custom images some resizing may be required. Infor's images may be found in the ..\Web\Images\ folder on the ePathway Web Server.

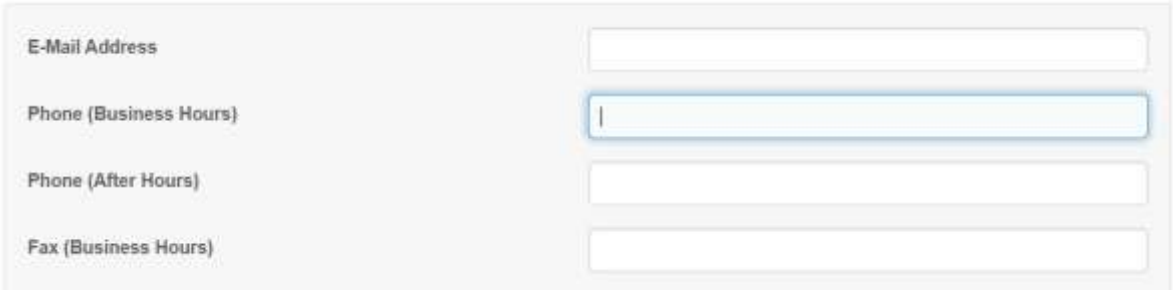
Accordion view for select list forms:



New property search tab view:

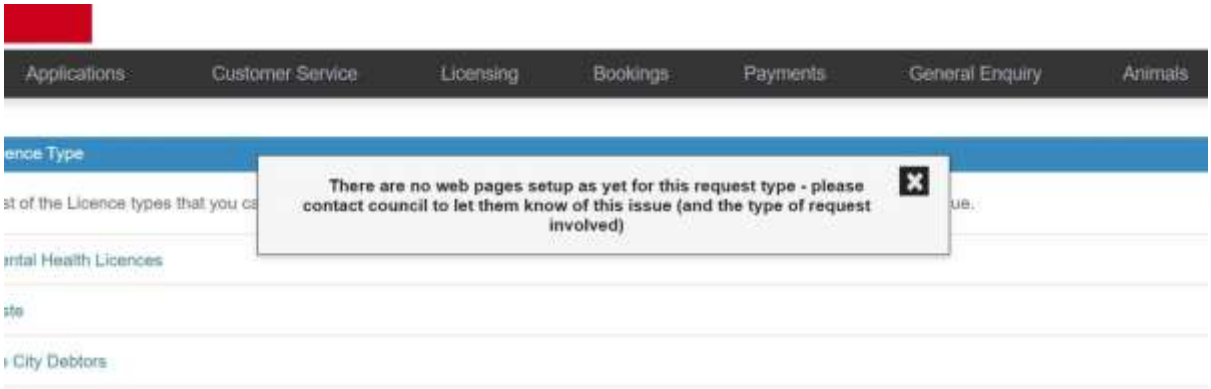


Blue border around field in focus:



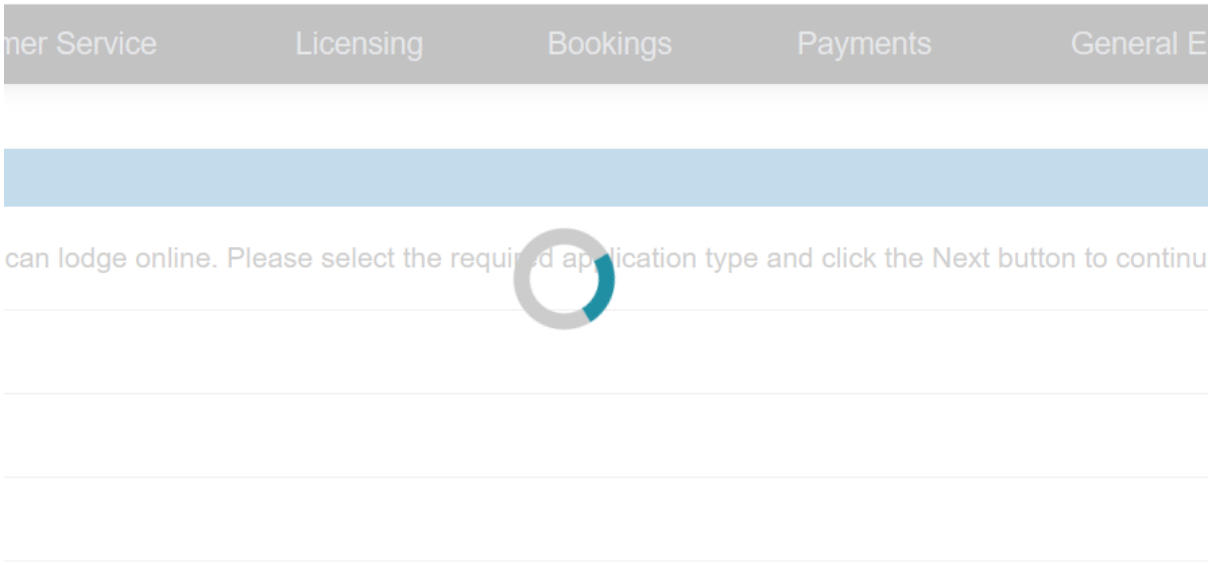
Warning message popup and mandatory field (red) border:

Error Message popup



Date Picker

New page loading control:



ePathway Home Page for Registered Users

Incident: SMART AND THICK CLIENT	DRN: 31747 KB:	Fix: ERS:

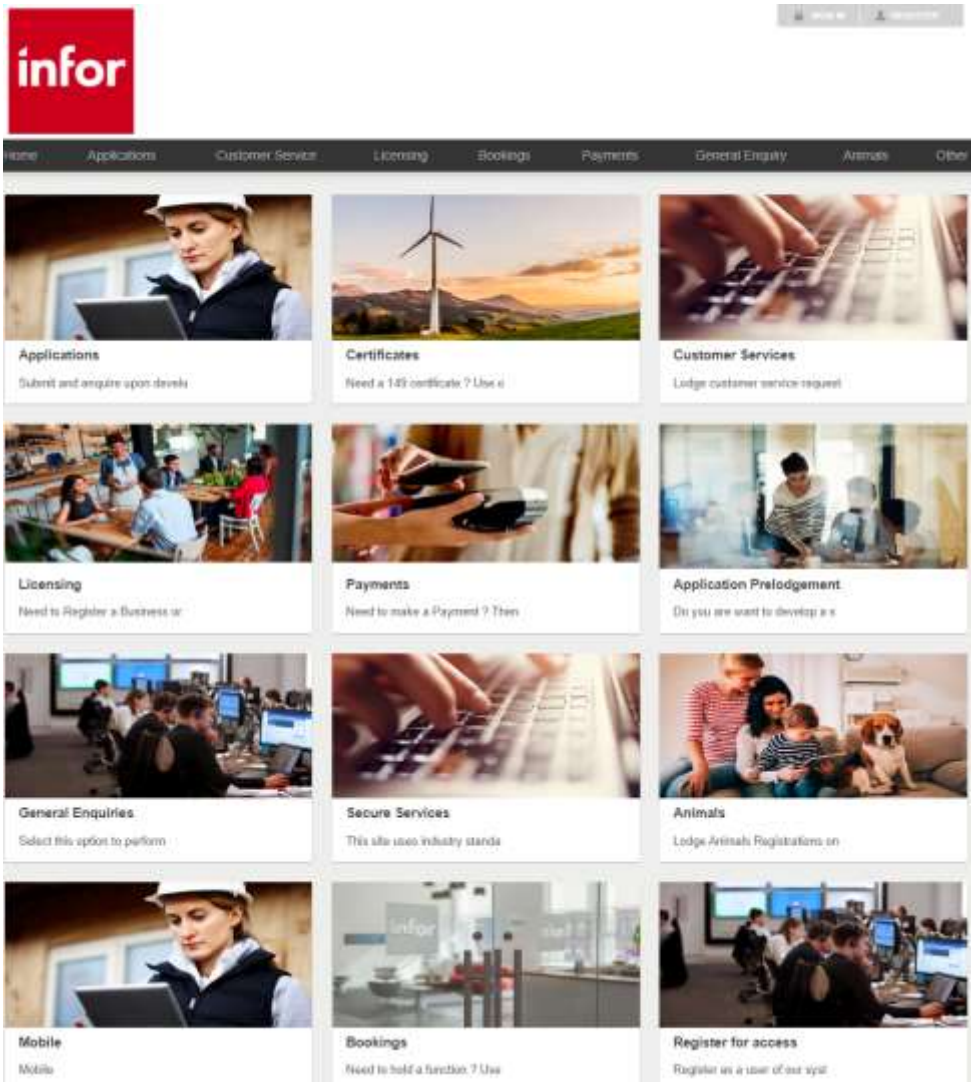
EPATHWAY HOME PAGE FOR REGISTERED USERS

The start page presented to all users in ePathway has always been a service based page, showing each of the council services available to the online user. There is now an alternative which allows councils to choose to initially present a user profile based page for registered users. This page is essentially an enhanced My Profile page that displays the registered user's interactions with council.

It should be noted that this change only affects registered users once they log in and it can be disabled if councils wish to retain the existing presentation of the council services form.

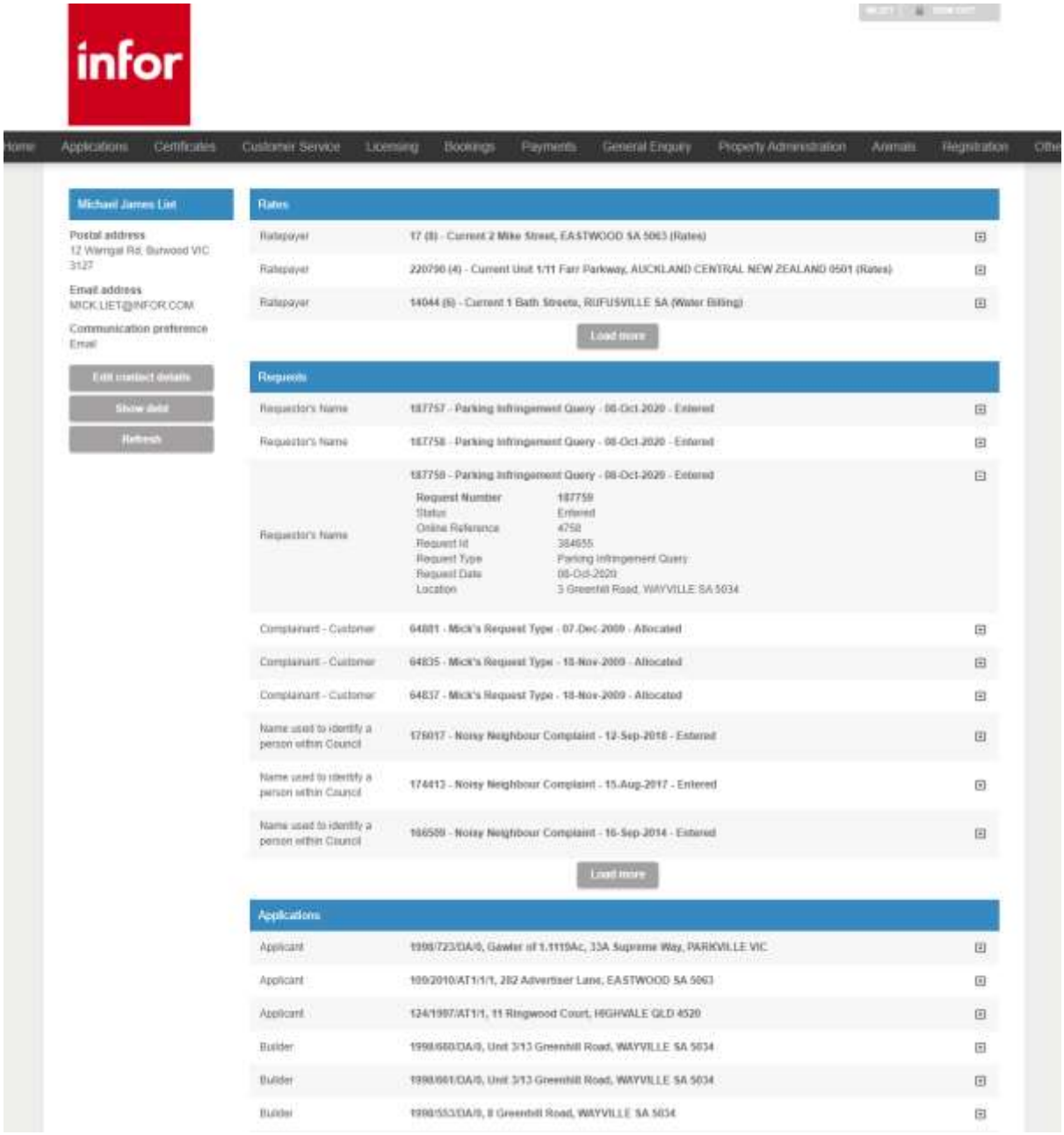
EXISTING VS NEW

Customers visiting the site as unregistered users or registered users yet to login will be presented with the existing council service based form as before.



Example unregistered user service based home page remains unchanged

Once a customer logs in, the home page will now display a new form with details of each of their known interactions with Pathway business objects (i.e. Their roles).



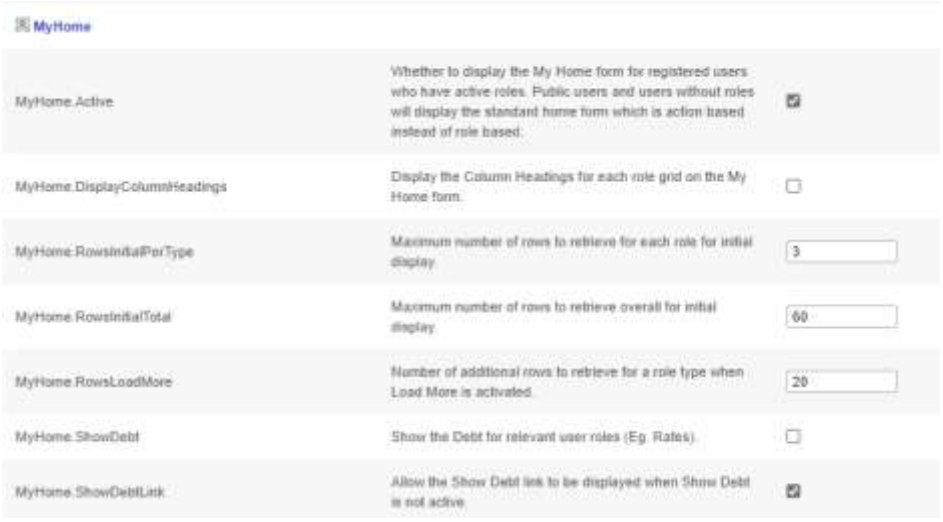
Notes:

- See next section for each of the configuration options available, but they include being able to determine the number of rows per type to be initially displayed, whether to include column headers, modifying all text labels, etc.
- The Show Debt button will refresh the form and display an additional column for relevant roles displaying any outstanding non-zero debt (as per My Accounts). Note that it abides by the My Accounts configuration and only checks roles configured for My Accounts.
- Not all roles are included. For rates, only ratepayer roles are present and only roles for Applications, Animals, Bookings, Infringements, Inspections, Licensing, Property, Rates and Requests are included by default. Additional filtering for each role is performed using the previous My Profile form filters (i.e. Anything added to the "MyProfileFilterRoles" setting in the web.config will be excluded).
- Most roles will have the option to expand, which is indicated by the ⊞ symbol at the end of the row. By clicking upon the row, it can be expanded to show more details as shown above on the 3rd request. This can be collapsed again by clicking upon the row again.

- For customers with a large presence, only a nominated number of rows are displayed for each role type (see MyHome.RowsInitialPerType setting below) and pressing the “Load More” button will retrieve more within each module. The roles are display in descending order by most recently created.

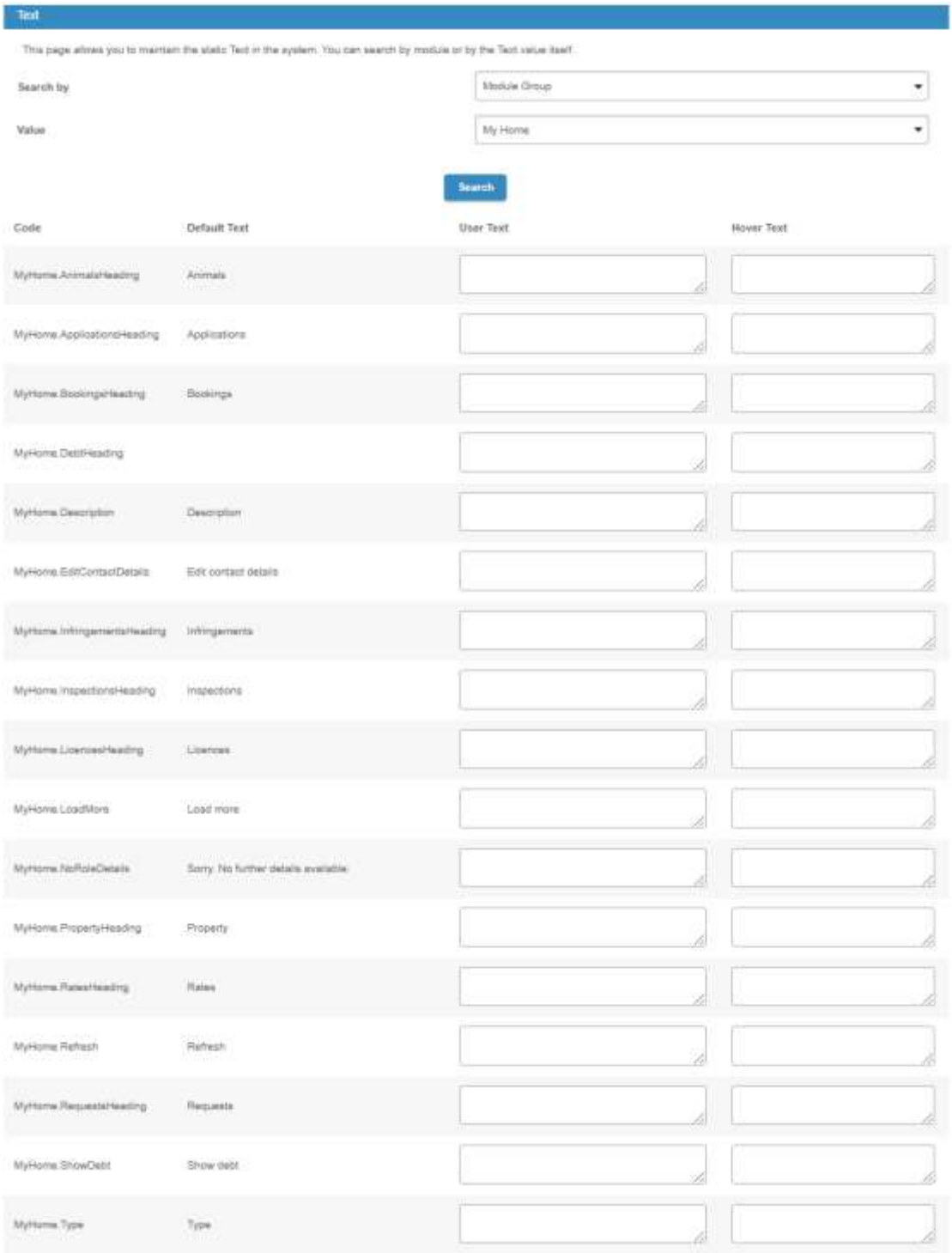
PARAMETERS

The ePathway Administrator users can configure whether this new feature is active and also determine some of the default behaviour as per the following new settings.
It is recommended to keep the RowsInitialPerType as a low number to ensure the page remains responsive, especially if ShowDebt is modified to be active by default.



My Home Settings in ADMIN >> Configuration >> System Settings

Similarly, each of the text headers and link/button labels for each modules grid can be tailored via new MyHome.* layout text items as shown below.



My Home text configuration in ADMIN >> Layout >> Text

ePathway General Enquiry Detail

Incident:	DRN: 31540 KB:	Fix: ERS: 29141

IMAGE PREVIEWS ON ATTACHMENTS

Image attachments on the General Enquiry Detail forms will now display a preview of the image on the link itself. Attachment links previously just displayed the default Attachment icon.

PDF Document Conversion

Incident: COGC 14810038	DRN: 31656	Fix:
SMART AND THICK CLIENT	KB:	ERS:

NEW EPATHWAY PDF JOB QUEUE WORD PROCESSING PARAMETER

In order to allow greater flexibility and to address possible throughput issues, a new ePathway PDF Job Queue can now be nominated via:
Word Processing >> Word Processing Parameters >> PDF Document Conversion Parameters >> ePathway PDF Job Queue

As a result, all PDF emails generated via the following ePathway processing will be sent to the new queue:
- Payment Receipts
- Application/Licensing Invoices
- Certificate Prints (Autogenerated)

This change will separate ePathway and Pathway PDF document generation into two distinct streams and therefore avoid any possible impact a large influx of documents or processing from one source has on the performance of PDF document generation for the other.

If no ePathway PDF job queue is nominated, then all processing will remain as it is today utilising the standard PDF Job Queue nominated on the PDF Parameter Maintenance form.

** IMPORTANT **
Due to the nature of Word Processing, it is IMPERATIVE that the new ePathway background job queue not be started and run on the same batch server as other job queues are run on. This job queue MUST be run on a physically different machine to the existing batch queues.

ePathway Customer Service

Enhancements

ePathway Customer Service Enquiry

Incident: COGC 14746128	DRN: 31645	Fix:
SMART AND THICK CLIENT	KB:	ERS:

LOCATION COLUMN ADDED TO EPATHWAY CUSTOMER SERVICE ENQUIRY

A location column, which display the first Property or Street/Suburb role link on a request, has been added to the ePathway Customer Service enquiry. This is now consistent with the equivalent Mobile enquiry.

Note that the new Location column can have its description tailored as a Text item, which now makes the following items responsible for the column headers on that form:

- CustomerService.CustomerRequestId
- CustomerService.RequestId
- CustomerService.RequestType
- CustomerService.RequestDate
- CustomerService.Status
- CustomerService.Location
- CustomerService.RequestDetails

ePathway General Enquiry

Enhancements

Applications/Licence General Enquiry

Incident: SMART AND THICK CLIENT	DRN: 31663 KB:	Fix: ERS: ERS 60637

AUTOCOMPLETE FEATURE ADDED TO FORMATTED NUMBER SEARCH

The Formatted Number Search option within ePathway General Enquiry for Applications/Licensing now has a autocomplete feature enabled on the Formatted Number field. This means that after entry of a partial formatted number, the system will suggest matching numbers in a dropdown list beneath the field.

It should be noted that the list is prioritised by:

- Exact full match first
- Exact match to start of formatted number
- Exact match to the application number
- Any other match (e.g. any numeric portion matching application number or partial match within the formatted number)

ePathway Licensing

Enhancements

ePathway Licence Registration Number Validation

Incident: COGC 15130819	DRN: 31760	Fix:
SMART AND THICK CLIENT	KB:	ERS:

DUPLICATE VEHICLE REGISTRATION VALIDATION

The client side validation that ensures vehicle registration numbers entered for parking permit licences etc. has been enhanced to cater for the scenario where multiple registration number are placed on the same page layout but within different layout groups.

To summarise, the system will now validate:

- That registration numbers are unique across pages
- That registration numbers are unique on the current page even if the layout has them defined in separate field groups.

GIS

Enhancements

New GIS Interface for Pathway UX

Incident:	Work Item: 54409	Fix: 03107524
UX Client	KB:	ERS:

A new technique for GIS integration has been added to the UX client. It is identified by the GIS product code **UXWS** and uses a combination of Pathway External Web Services and URLs to achieve two-way integration with external GIS software. This technique is compatible with a cloud deployment of Pathway UX.

The supplier of the GIS software that needs to use this integration technique needs to make changes to support the new method of integration. This integration technique is expected to be used to replace the INTRAM - Intramaps interface implementation which will also remove the dependency of that interface on the legacy Internet Explorer browser.

An SDK document is available on request.

Infomart

Enhancements

Datamart - Licensing

Incident: COGC 13905976, PARRA15144401	DRN: 31399	Fix:
	KB:	ERS:

DEVELOPMENT CATEGORY QUESTIONS AND DIMENSIONS

** MS SQL ONLY **

A new Licensing_65 stored procedure has been created to populate the following new Infomart datamart tables:

- Licensing_Major_Category
- Licensing_Minor_Category
- Licensing_Category_Quest
- Licensing_Category_Quest_Val
- Licensing_Minor_Cat_Dim

These tables contain details of the Major Development Category Questions and Answers and Minor Development Category Dimensions associated with a licence.

Infringements

Enhancements

Additional Infringement Bulk Maintenance functions

Incident: ATA 15039216	Work Item: 36306	Fix:
UX CLIENT	KB:	ERS:

Previously some Bulk Maintenance functions were unavailable in Infringement Maintenance. The following Bulk Maintenance options have now been converted to the UX client.

- Infringement Names
- Infringement Letters
- Court Extract Adjustment

Licensing

Enhancements

Licensing Maintenance

Incident: COGC 14128242	DRN: 31499	Fix:
UX CLIENT	KB:	ERS:

NEW PARAMETER TO CONTROL THE UPDATING OF THE LICENCE EXPIRY DATE FROM THE CONSENT EXPIRY DATE

A new parameter has been made available to allow a site to choose, for a Consent Type, if the Licence's Expiry Date is to be updated from the Consent's Expiry Date.

The new 'Update Licence Expiry Date' parameter can be set in the Consent Maintenance parameter form (accessed from the Licensing>> Licensing Parameters menu option, selecting the Consent option). Having the parameter checked On will cause the Licence's Expiry Date to be set from the Consent Expiry Date when it is set in the Licence's Consent Maintenance form. Set ON retains the existing functionality. The upgrade will set the flag ON.

If the parameter is OFF the Licence's Expiry Date will not be updated.

Menu Option

Incident: COGC 14920264	Work Item: 49492	Fix:
UX Client	KB:	ERS:

UPDATE UNPROCESSED DEBTORS TRANSACTIONS

The following menu option has been added to the Licensing menu:

- Licensing >> Batch >> Update of Un-Processed Debtors Transactions

Owner Names Update Report

Incident: COGC 14920264	Work Item: 49515	Fix:
UX Client	KB:	ERS:

OWNER NAMES UPDATE REPORT

Navigation to the Owner Names Update Report Form has been added to the Licensing Module.

Name and Address Register

Enhancements

Name and Address Maintenance

Incident: BALL 14852052	Work Item: 51605	Fix:
UX Client	KB:	ERS:

PERSONAL/COMPANY NAME MAINTENANCE

The maintenance options available on the Personal and Company Name Summary forms are now also available on the Personal and Company Name Maintenance forms.

Name and Address

InforXtreme Incident:	DRN: 31348	Fix:
SMART AND THICK CLIENT	KB:	ERS: 11847

NAME COMMUNICATION AND INFORMATION DETAILS SEQUENCING

The following documentation describes the functional modifications to the sequencing of communication details on personal and company names.

The equivalent functional modifications have been provided for the sequencing of information details on personal and company names. The functional modifications to information details sequencing have not been explicitly documented and it can be assumed that all documentation pertaining to communication details is also applicable to information details.

The purpose the modification is ensure communication details against a name are sequenced consistently and to avoid ambiguity in situations where a name has multiple communication details for a given communication type. This is particularly critical for the “E-mail” and “Mobile” communication types that are used for the addressing of automated E-mail and SMS messages.

PREVIOUS FUNCTIONALITY

The sequence of name communication details could be in either “Default Sequence” or “Changed Sequence” based on whether a user had explicitly changed the order via the “Up” and “Down” buttons on the name maintenance form.

If explicit ordering had been performed the “Changed Sequence” was retained on the communication details.

If no explicit ordering had been performed the “Default Sequence” was inherited from the communication types.

Merging names with “Default Sequence” and “Changed Sequence” communication details could have resulted in the creation of multiple communication details for a given communication type with an ambiguous sequence.

For example:
“Merge-To” name had communication details in “Default Sequence”.

“Merge-From” name had communication details in “Changed Sequence”.

“Merge-To” and “Merge-From” names had different “E-Mail” communication details.

The result of the name merge process was a single “Merge-To” name with two “E-Mail” communication details with an ambiguous sequence and therefore the potential of an inappropriate address being used for an automated E-mail message.

The ambiguity was the result of the “Merge-To” name having a mixture of “Changed Sequence” and “Default Sequence” communication details.

NEW FUNCTIONALITY

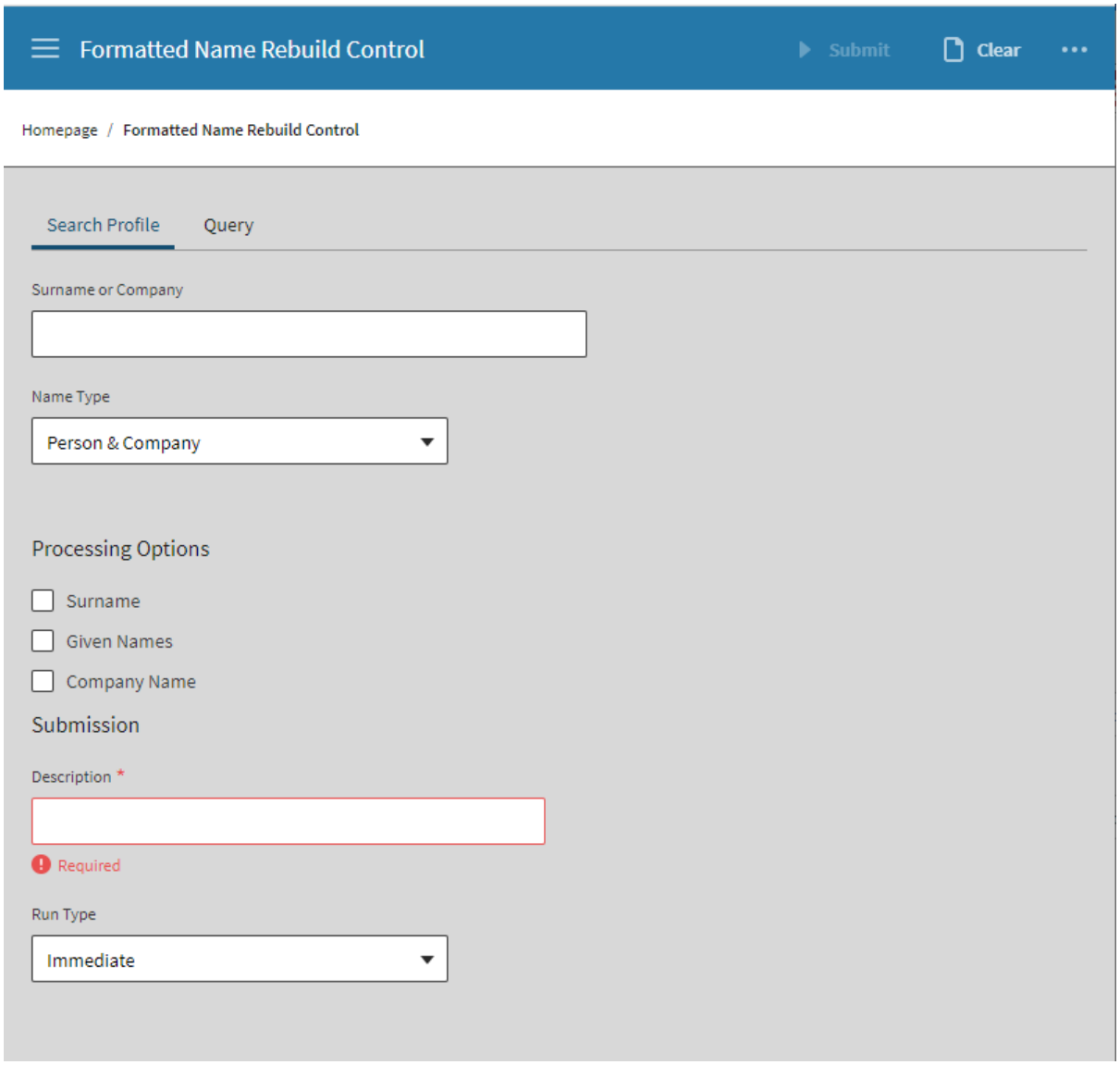
The modifications in this release will remove the ambiguity by ensuring that a sequence value is assigned on all name communication details.

The creation of new names and the update of pre-existing names will assign a sequence value to all communication details.

The communication detail with the lowest sequence value for a given communication type will be used for all automated message addressing.

DATA CONVERSION

Though not strictly necessary, it is highly recommended that a “Formatted Name Rebuild” process is performed over all Person & Company names after the installation of this Pathway release.



Name and Address Register >> Name and Address System Housekeeping >> Rebuild Formatted Names

The “Formatted Name Rebuild” process will assign sequence values to all pre-existing name communication and information details.

Not performing a “Formatted Name Rebuild” process over all names may require the communication and information sequence values having to be computed as a name is accessed during standard Pathway operations. This places an additional processing load on standard Pathway operations that can be avoided by performing a “Formatted Name Rebuild” process.

INTERACTIVE MAINTENANCE

Even though all name communication details now have sequence values and no longer inherit sequence values from the communication type the notion of “Default Sequence” and “Changed Sequence” is retained.

It is still possible for a user to specifically order the communication details via the “Up” and “Down” buttons or to “Restore Default Sequence”.

A “Default Sequence” is computed if the sequence of the communication details is identical to the sequence of the communication types. If there are multiple communication details for a given

communication type, then the communication details within the communication type also need to be in chronological creation order. Any sequencing deviation is considered as a “Changed Sequence”.

The “Default Sequence” or “Changed Sequence” computed state determines the sequence that new communication details are inserted on the interactive name maintenance forms.

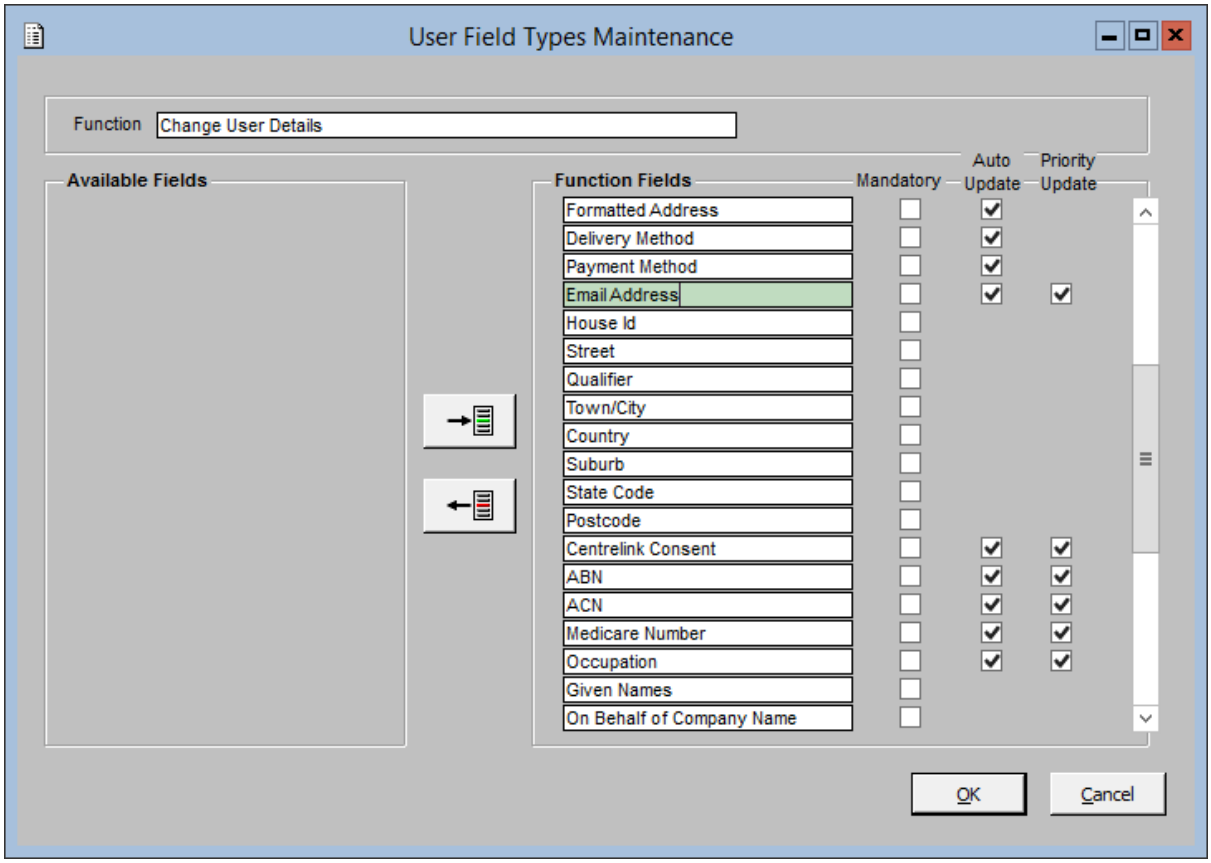
For example:
In a “Default Sequence” computed state the insertion of a new “E-Mail” communication detail will sequence the new communication detail based on the “E-Mail” communication type sequence and after any pre-existing “E-Mail” communication details.

In a “Change Sequence” computed state the insertion of a new “E-Mail” communication detail will sequence the new communication detail after all pre-existing communication details irrespective of the communication type sequence.

NON-INTERACTIVE MAINTENANCE

The creation and updating of name communication details can also be initiated from other non-interactive functions such as ePathway, CityWatch, Name Imports, EDMS integration, External Web Service, ION BODs, etc... The name communication details that are created or updated by these functions will assign the sequence based on the pre-existing functionality.

A new “Priority Update” parameter has been provided for the “New User Registration” and “Change User Details” functions. The “Priority Update” check box is used to determine how name communication and/or information details that are “Auto Update” by these functions are sequenced.



System Menu >> System Administration >> ePathway >> System Parameters >> User Field Types Maintenance

By default, the “Priority Update” parameter for all “Auto Update” function field is checked on. This preserves the pre-existing functionality in that name communication details that are automatically

created by these functions are given sequencing precedence over name communication details for the same communication type that are already present.

If a “Priority Update” parameter is subsequently checked off, then name communication details that are automatically created by this function are sequence as per the “INTERACTIVE MAINTENANCE” functionality described above.

ROLE LEVEL SEQUENCE OVERRIDES

In most circumstances name communication details are only sequence at a name level. Some circumstance may require name communication details to also be sequence at a role level.

For example:
Rates Notices need to be addressed to a secondary “E-Mail” address rather than the primary “E-Mail” address.

Role level communication details sequence overrides require further investigation and potential maintenance at the role level when communication details are changed at a name level.
If a name has role level communication details sequence overrides defined, an informational message stating, “The name has roles where the sequence of Communication Details have been changed.”, informs the user changing the name level communication details of the existence of these role level sequence overrides.

The “Particulars” part on the Pathway UX Client Name Summary forms also indicates whether role level communication details sequence overrides are present.

NAME MERGE

Having sequence values on all communication details eliminates potential ambiguity after merging names with a mixture of “Changed Sequence” and “Default Sequence” communication details.

The communication details on the “Merge-To” name will always retain precedence over the communication details moved from the “Merge-From” names.

Any role level communication details sequence overrides on the “Merge-From” names will be transferred to the “Merge-To” name.

COMMUNICATION DETAIL USAGE

Name communication details are used extensively throughout Pathway and exchanged with non-Pathway systems through integration functions.

All Pathway functions and Pathway integration functions have been changed to honour the name communication detail sequencing.

For example:
If a name has multiple communication details of a given communication type and the function only requires a single value for a given communication type, then the communication detail with the lowest sequence value within the communication type is used.

Property Administration

Enhancements

Property Maintenance

Incident: COGC 14425367	DRN: 31549	Fix:
UX CLIENT	KB:	ERS:

PROPERTY SUMMARY

An enhancement has been made to the Property Summary form. Where a Property Owner was added as part of a transfer, the Transfer Date will be displayed within the Names section of the Property Summary form.

To enable the full details to fit on the Property Summary Form (as shown above) it is recommended that the 'Property Names' Part be set to a Part Orientation of Stack.
This is done via System Administration >> System Parameters >> Summary Form Maintenance >> (Property) >> Summary Form Layout.

System Parameter Maintenance

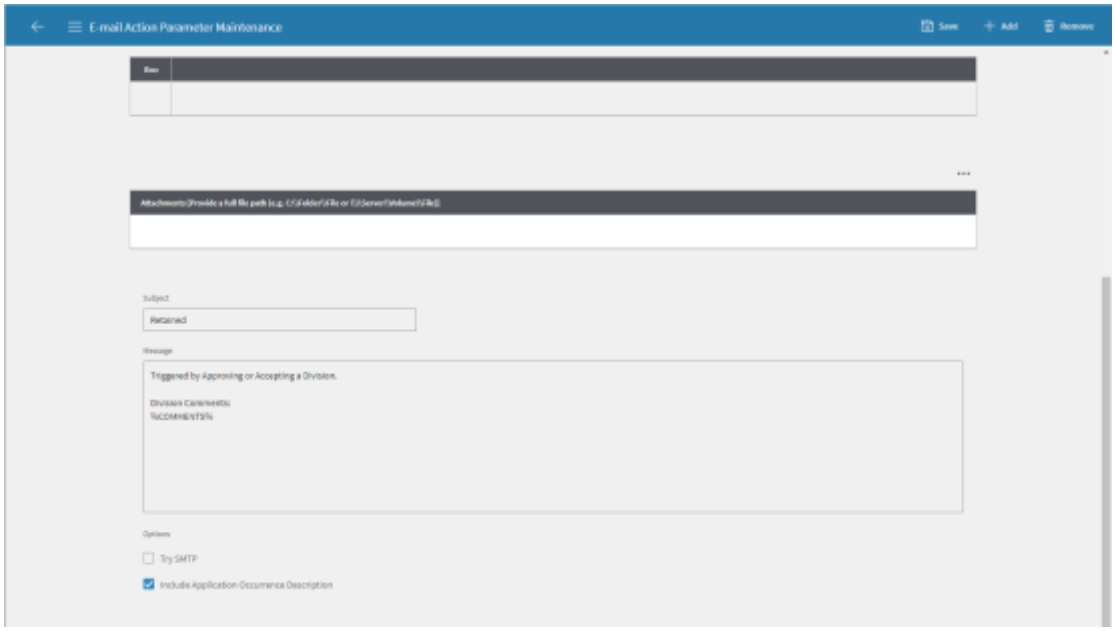
Incident: COGC 14425578	DRN: 31550	Fix:
UX CLIENT	KB:	ERS:

WORKFLOW PARAMETERS

An enhancement has been made to the workflow **MAIL – E-mail** system action to allow the property division comments to be included in the email sent during a property division and the transfer date to be included in the email sent during a transfer of ownership.

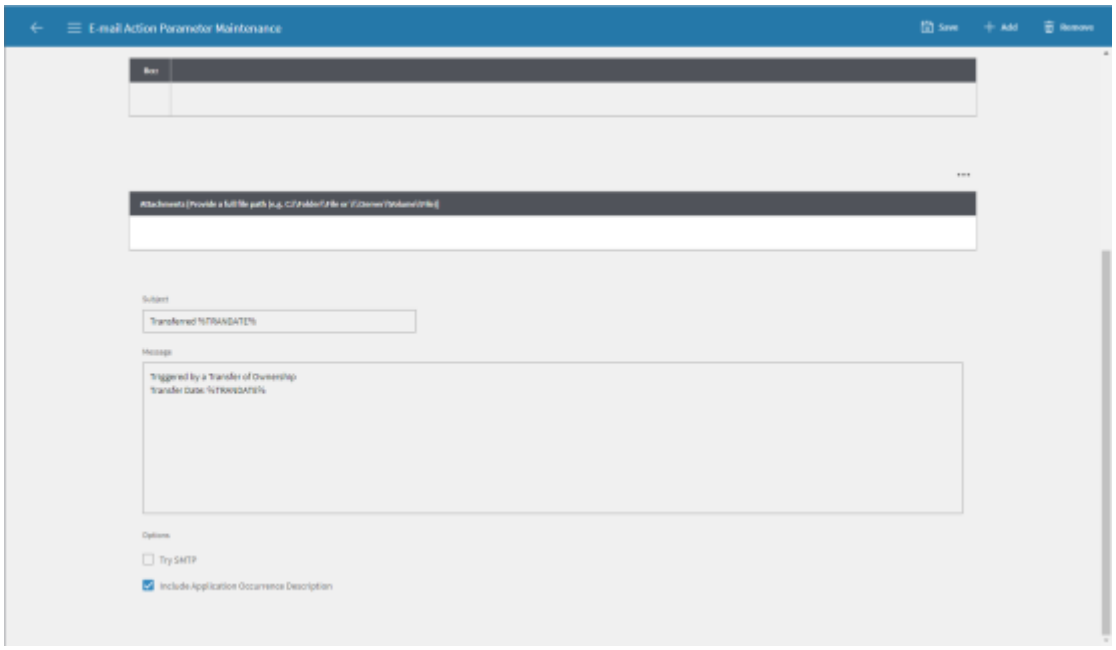
Divisions Parameters

To include the property division comments in body of the email add the text %COMMENTS% to the message within the email action parameters associated with the retained or historic task.



Transfer Parameters

To include the transfer of ownership transfer date in subject and/or body of the email add the text %TRANDATE% to the subject and/or message within the email action parameters associated with the transfer task.



Rates Accounting

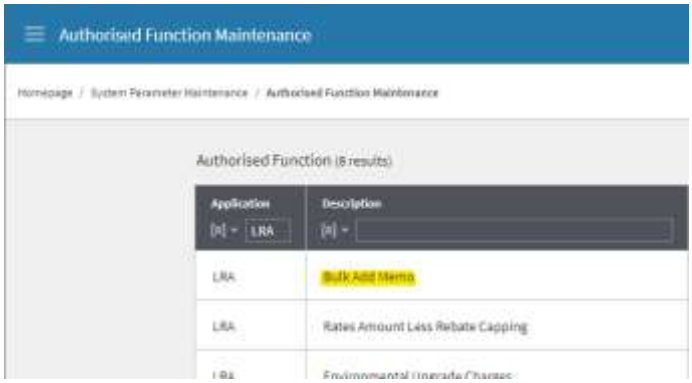
Enhancements

Bulk Assessment Maintenance Generation

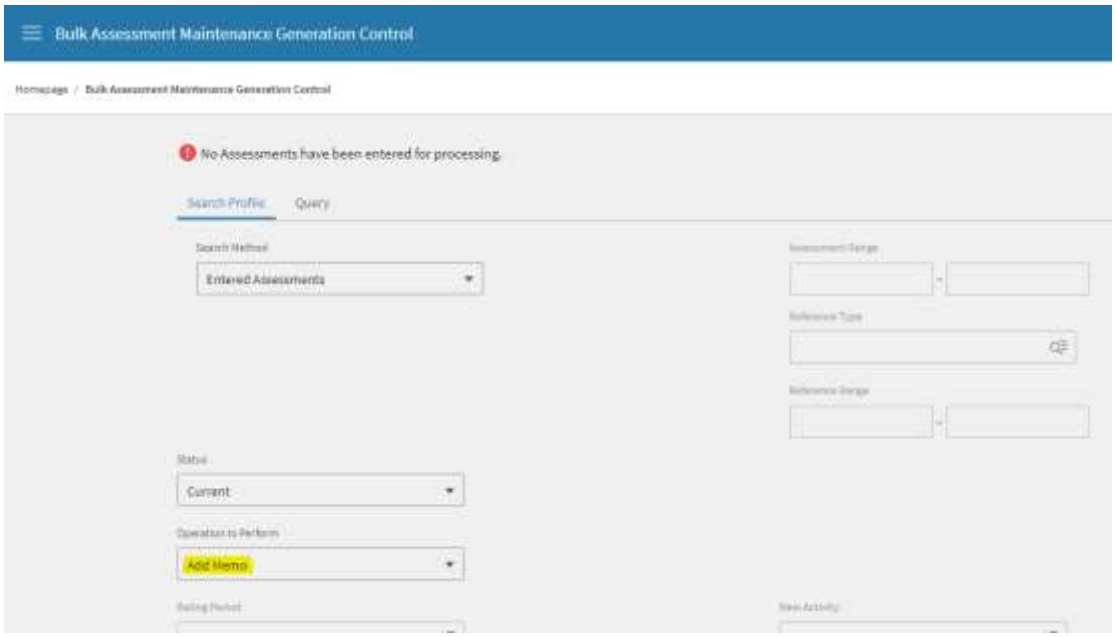
Incident: COGC 13676800, COGC 14423922	DRN: 31548	Fix:
UX CLIENT	KB:	ERS:

BULK ASSESSMENT MAINTENANCE GENERATION CONTROL

The Bulk Assessment Maintenance function (in the UX client only) has been enhanced to allow a memo to be added to multiple assessments. To use the new functionality, the site must be authorised to the *Bulk Add Memo* authorised function.

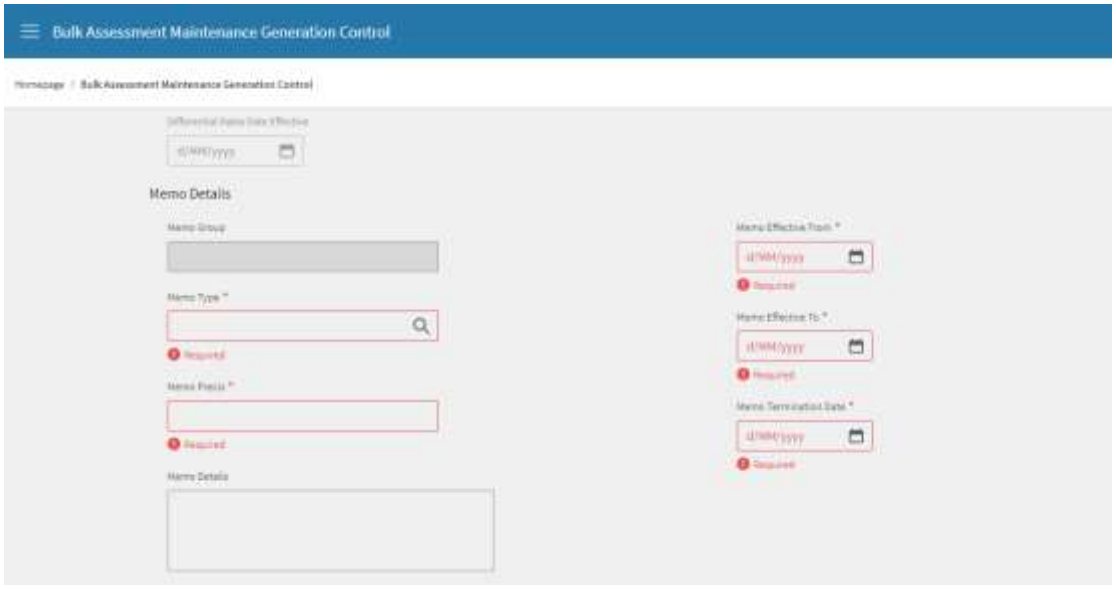


Once authorised to the Bulk Add Memo authorised function, a new *Add Memo* option will be available for selection within the *Operation to Perform* field on the Bulk Assessment Maintenance Generation Control form.



Selecting the Add Memo operation will make the following fields available for entry:

FIELD	REQUIRED/OPTIONAL
Memo Type	Required
Memo Precis	Required
Memo Details	Optional
Memo Effective From	Required
Memo Effective To	Required
Memo Termination Date	Required
Urgent	Optional



For the memo to be added to the selected Assessments, users must run the Bulk Assessment Maintenance Update after the Bulk Assessment Maintenance Generation has been successfully run.

Receipting

Enhancements

Receipt Entry One View

Incident: BALL 14933103	Work Item: 52669	Fix:
UX Client	KB:	ERS:

ONE VIEW CUSTOMER PAYMENT ENQUIRY FORM

A new filter option called "All Balances" has been added to the Customer Debts grid filters in the ellipse menu. The new filter will display all entries with debit, credit, or zero balances. Previously a UX user was able to filter on one balance type only.

A new filter option called "Clear Filter" has been added to the filters section in the ellipse menu of any grid with existing filters in the ellipse menu. This includes the following forms:

- One View - Customer Payment Enquiry
- Application Affected Properties Maintenance
- All Inspections Enquiry
- Hierarchy Maintenance
- Authorised Function Maintenance
- Booking Maintenance/Enquiry

Suspended Receipts List

Incident: BALL 14926042	Work Item: 52670	Fix:
UX Client	KB:	ERS:

The suspended receipt result list has been updated to show the change in status when a receipt is accepted, voided, or suspended. It is now clearer to tell which receipts remain suspended as they are the only active results within the list.

Smart Mobile Core

Enhancements

Smart Mobile CityWatch Requests

Incident:	DRN: 31539 KB:	Fix: ERS: 13267

MANDATORY FIRST AND LAST NAMES

Two new settings (requestTypesWithOptionalGivenName and requestTypesWithOptionalSurname) have been added to the config.js to allow First and Last names to be Optional fields based on the selected Request Type.

Smart Mobile CityWatch

Enhancements

CityWatch Payments

Incident: COGC 14574309	DRN: 31596	Fix:
SMART AND THICK CLIENT	KB:	ERS:

AMOUNT DISPLAY ON PAYMENT SELECTION DIALOG BOXES NOW IN CURRENCY FORMAT

The payment selection dialog box presented within CityWatch My Accounts when the user has the option to choose between multiple amounts now shows amounts in a currency format instead of just a number. E.g. '$50.00' instead of just '50'.

This has been done for the Animal Registration, Rates and Debtors payment selections within My Accounts and for the Ticket selection for Parking Infringements when searching via registration number.

Some of the field labels on those payment selection forms have also been modified to be more meaningful (E.G. 'Registration Period' instead of 'Code' for animal registration selection).

CityWatch Application/Licence Enquiry

Incident:	DRN: 31663	Fix:
SMART AND THICK CLIENT	KB:	ERS: 60637

AUTOCOMPLETE FEATURE ADDED TO APPLICATION/LICENCE REFERENCE FIELD

The Application/Licence Reference Field (i.e. Formatted Number) within the CityWatch Applications/Licensing Enquiry forms now has a autocomplete feature enabled on the field. This means that after entry of a partial formatted number, the system will suggest matching numbers in a dropdown list beneath the field.

It should be noted that the list is prioritised by:

- Exact full match first
- Exact match to start of formatted number
- Exact match to the application number
- Any other match (e.g. any numeric portion matching application number or partial match within the formatted number)

Valuations

Enhancements

VG Number Update

Incident: COGC 14574511	DRN: 31581	Fix:
UX CLIENT	KB:	ERS:

ABILITY TO PROCESS 'CANCELLED' DATA SETS IN IMPORTED VG FILE

New functionality has been provided to allow the VG Number Update function to process a 'Cancelled' data set that is present in the imported file. This functionality is only available in the UX client, and only for Queensland councils that set the 'Load Valuations To' run parameter to 'Supplementary Rates'.

Define Import Format

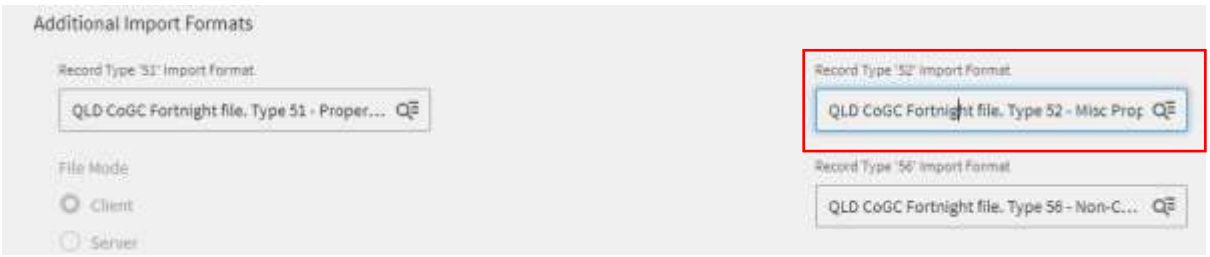
To allow this new capability to be used, a new Import Format needs to be defined for Record Type '52' as follows using the Export/Import Format Maintenance menu option under the Query>>Query Parameters menu:

Field:	Value to be set to:
Export/Import	Import Only
Export/Import Format	Fixed Width
Record Separator Character	(Carriage Return)
Entity	LVLVGUD

Set the Select Fields as follows:

VG Number Update

The VG Number Update Control form has been changed by the addition of the Record Type '52' Import Format field, which is only shown when the Valuation module's 'Valuation Tape Legislation' system parameter is set to 'Queensland' and when the VG Number Update's 'Load Valuations To' run parameter is set to 'Supplementary Rates':



The Record Type ‘52’ Import Format field is optional: If nominated then all Cancel data sets in the DNRM import file will be processed; if not nominated the Cancel data sets will not be processed.

The following occurs when a ‘Cancel’ set is processed:

If the Cancel data set is for a VG that is related to only one Assessment then if that Assessment already has a Supplementary that is in progress then an exception message is printed, and the Cancel data set is not processed.

If the Cancel data set is for a VG that is related to multiple Assessments then exception messages will be printed if a) a VG Supplementary is in progress for that VG, or b) if a Supplementary is in progress for an Assessment that is related to that VG. The Cancel data set is not processed in these circumstances.

If the Cancel data set’s Cancellation Effective Date is earlier than any existing Supplementary for that Assessment, then an exception message is printed; the Cancel data set will still be processed.

Processing the Cancel data set will cause
a) an Assessment Supplementary to be created when the VG is only related to one Assessment,
b) a VG Supplementary to be created when the VG is related to multiple Assessments. The created Supplementary is set as follows:

- The Date Effective is set to the Cancellation Effective Date advised in the Record Type ‘52’ record.
- The ‘Make Historic’ field is set to Off so that the Assessment is not made Historic.
- The ‘Don’t Generate Rates’ field is set to Off so that no adjustment to Rates occurs.
- Values for all Valuation Types present on the VG are loaded into the Supplementary. All values are set to zero, including the value for the Average Value as well as the value for the Developer Concession value if present.
- The Rate Types that exist for the Assessment are loaded to the Supplementary Entry as per normal processing however no changes to those Rate Types are made. i.e. The Differential Rates Rate Type(s) on the Supplementary aren’t updated to reflect the new values being set to zero.

The VG Number Update Exception Report will advise if a Cancel data set couldn’t be processed.

The VG Number Update Detail Report has been changed so that when the VG Update is being run in Load Valuations To 'Supplementary Rates’ mode a new ‘Change Type’ column is printed on the report. When a Cancel data set is processed the VG Number will be printed along with ‘Cancel’ in the Change Type column. When a normal ‘change’ data set is processed the existing details will be printed along with ‘Update’ in the Change Type column.

The VG Number Update Supplementary Rates Report prints the ‘Supplementary processed’ Information message in the same way as currently occurs when a Supplementary has been created.

Workflow

Enhancements

Customer Service

Incident: COGC 14920264	Work Item: 49474	Fix:
UX Client	KB:	ERS:

MISSING MENU ITEM

Previously the Customer Service >> Reports >> Application Tasks Report was missing from the UX Menu.

Workflow

Incident: BALL 14848386	Work Item: 51794	Fix:
UX	KB:	ERS:

NAVIGATION

Previously, when a Task was started from the Summary Form (of any module) and the Task subsequently completed, the user was not being returned to the Summary Form. The user is now returned to the Summary Form.

Customer Service

Incident:	Work Item: 49473	Fix:
UX	KB:	ERS:

MENU

Previously, Customer Service >> Reports >> Actual Time Report was missing from the UX Menu.