

# Pathway RELEASE NOTES

Enhancements

3.10.023

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

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***Pathway Release 3.10.023***

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# Introduction

This document describes enhancements and new functionality made available in Release 3.10.023 of the Pathway software.

## Included in this document are the following sections:

### Online Help

This includes an overview of how to access Pathway Help.

### 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 3.10.023 Enhancements.pdf
- Infor Pathway Release Notes 3.10.023 Fixes and Software Corrections.pdf
- Infor Pathway Release Notes Summary 3.10.023.xlsx

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

## Online Help

Help documents can be accessed from within the Pathway UX Client by going to My Account >> Help.

This will take you to the Infor Documentation page.

Click on the Title **Infor Pathway UX User and Administration Documentation Library (Cloud and On-Premises)**.

Help is split between Administrator and User Topics. Modules can be accessed from the Administrator and User headings.

# System - Functionality

## Enhancements

### Paperclip Attachments

Incident:  
UX Client

Work Item: 58256  
KB:

Fix:  
ERS:

#### ADD ATTACHMENTS VIA SUMMARY FORM

All Module Summary Forms that have the Paperclip option available, now have this feature.

The new feature allows a user to simply drag and drop files to upload them and create a new Paperclip Attachment without the need to open the Attachment Maintenance form.

This saves time and vastly simplifies the process of creating Paperclip Attachments.

A new part will automatically appear on the Summary Forms that looks like this:

The screenshot shows a form titled "Add Attachment". It contains three main sections: a dropdown menu for "Attachment Type" with the selected option "ANYFILE - Any file at any location", a text input field for "Description" containing "My new drag and drop attachment!", and a dashed border area for file upload with an upward arrow icon and the text "Drag and Drop or [Select Files](#) to Upload".

The Attachment Type that is set as the default for the module will be automatically selected and can be changed as required. The description will default if set to do so for the Attachment Type and can be overridden if required.

Attachment Types for the module with a default path set will be available for selection and any restrictions on file extensions set for an Attachment Type are enforced.

Simply drag one or more files and drop them on the target area and they will be uploaded, and a new Paperclip Attachment created for each uploaded file.

For any devices where drag and drop is difficult or not available, the Select Files hyperlink allows the user to choose files available to the device to upload instead.

If EDMS integration is in use for the Attachment Type the file will be automatically registered into the external EDMS software.

This new feature is available in the following maintenance menu options:

- Animal Registration >> Animal Maintenance
- Applications >> Application Maintenance
- Bookings Management >> Booking Maintenance
- Customer Service >> Request Maintenance
- Debtors >> Debtor Maintenance
- Infringements >> Infringement Maintenance
- Inspections >> Inspections Maintenance
- Licensing >> Licensing Maintenance
- Name and Address Register >> Name and Address Maintenance
- Property Administration >> Property Maintenance
- Rates Accounting >> Assessment Maintenance
- Registers >> Register Entry Maintenance
- Trade Waste >> Assessment Maintenance
- Water Billing >> Assessment Maintenance

## Form Profiles

Incident: MELV 15748568  
UX Client

Work Item: 56475  
KB:

Fix: 03107724  
ERS:

The Form Profile's within UX will now save the control properties, so that the collapse state of the ranges, expanded areas will be saved with a profile. This also includes when the user returns to a search form, after viewing the results. E.g., Number and Year collapsed and saved to a Form Profile

The screenshot shows a web interface with a tabbed menu. The 'Application Details' tab is selected and underlined. Below the tabs, there are two input fields. The first is labeled 'Number' and the second is labeled 'Year'. Each input field is followed by a blue double arrow icon (»), indicating that the content is collapsed.

## Pathway UX External Web Services API

Incident: COGC 16415504  
UX Client

Work Item: 58442  
KB:

Fix: 03107724  
ERS:

The Pathway UX External Web Services API endpoint now prevents an auto login request, and only allows Pathway or Active Directory Authentication.

## My Account >> Support

Incident:  
UX Client

Work Item: 58877  
KB:

Fix:  
ERS:

CLEAR CACHES BUTTON TOOLTIP

The tooltip for the Clear Caches button has been updated to clarify that this action clears the caches for all users not just the current user.

It is worth noting that the caches being cleared by this button are all the server side caches, anything cached by the browser may need to be cleared by each user using SHIFT-F5 if necessary.

## ION Parameter Maintenance

Incident: UX and Smart Clients	Work Item: 59108 KB:	Fix: ERS:
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### ION PARAMETER MAINTENANCE

The Pathway ION Inbox Listener has been changed to process the inbound into ION Inbox Entries, COR\_INBOX\_ENTRY, in arrival sequence within a given priority. If the ION Inbox Listener is not started, then a backlog of ION Inbox Entries can accumulate resulting in the potential of multiple ION Inbox Entries being present for the same noun instance. Prior to this correction, there was no explicit order in which the backlog of ION Inbox Entries was processed and could result in updates being performed in a random sequence.

For example.

The non-Pathway system issues a Process.CustomerCall to update a given Pathway Customer Request to a status of 'In-Progress'.

The non-Pathway systems issues another Process.CustomerCall to update the same Pathway Customer Request to a status of 'Completed'.

Prior to this correction, there was the potential of the 'Completed' Process.CustomerCall ION Inbox Entry being processed before the 'In-Progress' Process.CustomerCall resulting in the Pathway Customer Request having an incorrect status after the two updates to the same noun instance were performed.

The most common cause of the Pathway ION Inbox Listener or ION Outbox Sender abnormally stopping is when an inbound into Pathway BOD from a non-Pathway system fails to meet fundamental prerequisites of ION Inbox/Outbox integration.

For example, if an inbound into Pathway BOD contains special control characters that cannot be stored within the Pathway database, both the ION Inbox Listener and ION Outbox Sender background processes can experience 'fatal' errors that result in the processes being terminated and necessitate a restart.

The Pathway ION Inbox Listener and ION Outbox Sender have been enhanced to handle the situations where non-Pathway systems fail to meet the fundamental prerequisites of ION Inbox/Outbox integration.

The fundamental prerequisites of an inbound into Pathway Inbox Entry include:

- valid mandatory Inbox Headers denoting 'TenantId', 'MessageId', 'FromLogicalId', 'ToLogicalId' and 'BODType'
- 'Well Formed' and valid XML
- data content limited to the character set supported by the Pathway database

Prior to this modification an inbound into Pathway Inbox Entry that failed to meet fundamental prerequisites could result in an unexpected stoppage of the Pathway ION Inbox Listener or ION Outbox Sender as it was not possible for Pathway to route a valid ConfirmBOD Outbox Entry to the issuing system.

In these situations, the remediation required examination and analysis of the:

- ION Inbox tables, COR\_INBOX\_ENTRY and COR\_INBOX\_HEADERS
- Pathway Inbox table, CSYESBI
- ION Outbox tables, COR\_OUTBOX\_ENTRY and COR\_OUTBOX\_HEADERS
- Pathway Outbox table, CSYESBO

- ..\tmp\ApplicationServer.ION.log file

The Pathway Inbox Listener and Inbox Sender have been enhanced to detect and record the situations where non-Pathway systems fail to meet fundamental prerequisites of ION Inbox/Outbox integration.

Upon the detection of an unexpected situation, the Pathway Inbox Listener and Outbox Sender will now record the event in the appropriate ION Event Log and send an e-mail to the ION 'Administrator E-mail Address'.

ION Inbox and Outbox Event Log Entries are categorised by the following 'Severity' based on the probable cause:

- 'Fatal', Probable cause is an ION configuration problem within Pathway that prevents the ION Inbox Listener or ION Outbox Sender being started.
- 'Validation', Probable cause is the inbound into Pathway Inbox Entry fails fundamental ION validation that prevents a valid ConfirmBOD being issued from Pathway.
- 'Error', Probable cause is an unexpected error with the ION Inbox Listener or ION Outbox sender such as a failure to perform an expected database update.
- 'Warning', Probable cause is an inbound into Pathway Inbox Entry cannot be applied by the Pathway module and a ConfirmBOD has been issued.
- 'Information', Probable cause is an expected event such as the 'normal' Start/Stop of the ION Inbox Listener and ION Outbox Sender.

All Event Log Entries, apart from those with a severity of 'Information', may require a corrective action to be performed, and therefore an e-mail is sent to the ION 'Administrator E-mail Address'.

Four new form enquiry forms have been provided to assist with problem diagnosis:

- ION Inbox Event Log Enquiry
- ION Outbox Event Log Enquiry
- ION Inbox Item Enquiry
- ION Outbox Item Enquiry

The ION Inbox Event Log Enquiry and ION Outbox Event Log Enquiry forms can be accessed from new [Event Logs] options on the ION Inbox Maintenance and ION Outbox Maintenance forms.

The ION Inbox Item Enquiry form can be access by new [ION Inbox Item] buttons on the ION Inbox Message Enquiry and ION Inbox Event Log Enquiry forms.

The ION Outbox Item Enquiry form can be access by new [ION Outbox Item] buttons on the ION Outbox Message Enquiry and ION Outbox Event Log Enquiry forms.

The [...] options from the 'ION Administration' part on the Pathway UX Client HOME provide direct access to these enquiry forms and eliminates the need to access the forms via the 'ION Parameters' menu option.

The ION Inbox Item Enquiry and ION Outbox Item Enquiry forms accumulate information from the various sources such as:

- ION Inbox tables, COR\_INBOX\_ENTRY and COR\_INBOX\_HEADERS
- Pathway Inbox table, CSYESBI
- ION Outbox tables, COR\_OUTBOX\_ENTRY and COR\_OUTBOX\_HEADERS
- Pathway Outbox table, CSYESBO
- Pathway ION Event Log table, CSYESBE

In most situations the information presented on the ION Inbox Item Enquiry and ION Outbox Item Enquiry forms should provide sufficient detail to determine cause of the problem.

In situations when the cause of the problem cannot be determined by the ION Administrator and assistance is required from Infor Support, an [E-mail logs] option is available on the ION Inbox Item Enquiry and ION Outbox Item Enquiry forms.

The [E-mail logs] option collates all the information pertaining to the specific ION Inbox/Outbox Item, plus all relevant Pathway ION Parameter settings, into a zip file attachment that is e-mailed to the ION 'Administrator E-mail Address'. The recipient should attach the e-mail content to an Infor Support Portal Incident.

In situations where an external system fails to process an outbound from Pathway BOD, the [Submit ...BodType...] option can be used to issue another outbound from Pathway BOD. Where applicable, the [Submit ...BodType...] option on the ION Outbox Item Enquiry form submits a job to the ION Background Job Queue to create a new outbound from Pathway BOD for the given noun instance.

This avoids the need for a Pathway user to replicate the change on the Pathway business object that instigated the outbound from Pathway BOD, such as a changing and restoring a status value, in-order to provide the external system with another BOD to process.

## Pathway Sessions in Microsoft Word

Incident:	Work Item: 59236	Fix:
UX Client	KB:	ERS:

### SIGN OUT PATHWAY SESSIONS IN MICROSOFT WORD

Previously there was no way to sign out from a Pathway session signed into Microsoft Word; referred to by the underlying technology called WebDAV. The workaround was to manually delete the cookies stored in Control Panel - Internet Options.

Changes have been made to the My Account >> Sign Out processing to ensure external sessions to Microsoft Word are signed out at the same time as signing out of the Pathway session.

## Date and Combined Date/Time Fields

Incident:	Work Item: 57509	Fix:
UX Client	KB:	ERS:

### CALENDAR

The ability to determine which Pathway Calendar definition is in use for date and combined date/time fields has been added. To see the Calendar that has been applied, right-click on the required field and choose Inspect. The calendar in use will appear as the **data-calendar** attribute of the input element. For example:

```
<input type="text" class="datepicker datetime required" id="acrrequ-daterecv" data-calendar="DEFAULT"
```

# Applications

## Enhancements

### Development Categories Maintenance

Incident: MELV 15661024  
UX Client

Work Item: 56249  
KB:

Fix: 03107728, 03107730  
ERS:

The **Development Categories Maintenance** form now displays the questionnaire for the selected Development Category, and there is no longer the need to load an additional form to complete the questionnaire.

Major Development Categories Maintenance
Save Undo

---

n Building Summary / Major Development Categories Maintenance

Application

Application	Location
2022/6/DISPO	5 Cadell Shack Road, Cadell SA 5321

Assigned Major Development Category (1 result) + Add → Minor Development Categories → Conditions ...

[x]	Major Development Categories ▲
[x]	FOI1 - FOI Contact Information

Page 1 of 1 50 Records per page ▼

10. Your full name

20. Your postal address

30. Are you submitting this request for yourself?

Yes  
 No  
 Undecided

40. Full name of person you are submitting on behalf of

# Batch Processing

## Enhancements

### Maintain Job Queues Administrator Level

Incident: WAIK 16534258  
UX Client

Work Item: 58408  
KB:

Fix: 03107730  
ERS:

#### JOB QUEUE MAINTENANCE

It is usual practice to set up Pathway batch processor queues to automatically start and stop via Windows scheduled tasks, on server/s set up for batch processing. Additional batch processor queues may be set up for one off processing, using the start method set to Manually on any Server.

Previously to start a queue there were a couple of options, but all required logging onto the server hosting the batch queues; and with an account that had the credentials to access everything required by the queue to complete the job.

This change enables queues to be started from within Pathway via menu Batch Processing >> Maintain Job Queues Administrator Level, by adding the additional Start Method of **Manually on Specific Server**. This change does not impact on existing Windows scheduled tasks that stop and start queues automatically.

#### Instructions

To implement the change:

1. Create a Windows scheduled task on the server/s hosting the batch queues. This task listens for queue start requests; at the interval you decide e.g. 5 minutes, 30 minutes.
  - a. Copy the PowerShell script provided in the msc folder called ConfigureBatchProcessorQueuesUpdate.ps1 and put it onto the batch queue server, where the script will be run.
  - b. Edit the .msc\ConfigureBatchProcessorQueuesUpdate.ps1 using Notepad or PowerShell.
  - c. Change the Param lines adding:
    1. path to the Pathway environment used by the batch processor server/s,
    - ii. account username and password running the process.
    - iii. Interval shown below is 5 minutes.

Param

```
([String]$environmentPath = "\\InforInstallServer\Pathway\Production",
[String]$userName = "INFORBC\spinstall",
[String]$password = "password",
[Int]$repetitionMinutes = 5)
```

2. Run the PowerShell script once on each server that you want queues to be manually started from Pathway. That is, all servers specified against batch processor queues, where the batch processor queue has a Start Method of Manually on Specific Server.

NOTE: Use the following SQL statement to list all such servers:  
select distinct stronsvr from cbtjobq where strmethod = 'S' order by 1

3. Log on to the Pathway batch processor server as an administrator.
4. Run the updated PowerShell script, using, for example, Windows PowerShell ISE. Ensure it is successful. It should produce output like the following (there should be no red error messages):

```
PS C:\Windows\system32> C:\Users\edal\ConfigureBatchProcessorQueuesUpdate.ps1
```

```
2022-06-11 11:03:34 Creating a Windows scheduled task to automatically start
2022-06-11 11:03:34 Pathway batch processor queues.
```

2022-06-11 11:03:34 Path: \\InforInstallServer\Pathway\Production  
2022-06-11 11:03:34 User: INFORBC\spinstall  
2022-06-11 11:03:34 Repetition Interval (Minutes): 5  
2022-06-11 11:03:34 Current Computer: INFORBCPB01  
2022-06-11 11:03:34 Current User: spinstall  
2022-06-11 11:03:34 Current User Domain: INFORBC  
2022-06-11 11:03:34 Creating the Pathway Update Batch Processor Queues  
2022-06-11 11:03:34 scheduled task.  
2022-06-11 11:03:41 Complete.

NOTE: The account defined in the PowerShell script is now running the Windows scheduled task, so a change in password will require the Windows scheduled task to be updated.

5. The final step is to change the Pathway batch processor queues Start Method:
  - a. Open the Batch Processing >> Maintain Job Queues Administrator Level menu.
  - b. Change the Start Method on each queue from Manually on any Server to Manually on Specific Server.
  - c. Add in the server name and Save.

NOTE: To check that all queues have been changed over to the correct start method **Manually on Specific Server**, use the following SQL to list the queues with a start method of **Manually on any Server**.

```
select queuecode from cbtjobq where strmethod = 'M' order by 1
```

# Bookings Management

## Enhancements

### Booking Maintenance

Incident: UX Client	Work Item: 55040 KB:	Fix: 03107728, 03107729 ERS:
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#### BOOKING MAINTENANCE

An enhancement has been made to the **Booking Maintenance** form. When adding a Booking, if a child or option form is accessed (e.g. the **Booking Line Fee Maintenance** form via the **Fees** button on the Booking Line grid, or the **Fee Summary** form via the Fee Summary option) then both the **Booking Summary** and the **Booking Maintenance** forms will be included in the breadcrumbs to allow flexibility to either view the new Booking (via the Summary form) or continue editing the details of the new Booking (via the Maintenance form). This also addresses a problem where previously an error could occur when clicking on the **Booking Maintenance** breadcrumb. Also, previously the **Fee Summary** option was not accessible when adding a Booking.

# Customer Service

## Enhancements

### Business Event Notifications

Incident: ERS 71529  
UX Client

Work Item: 55756  
KB:

Fix:  
ERS: 71529

\*\*\*AUTHORISED FUNCTION \*\*\*

A new Pathway authorised function, *Business Event Notifications*, has been developed to automatically send system-generated email notifications. Emails may be addressed to customers or other stakeholders with a Name Role in the NAR or ad hoc email addresses stored in the References entity of the Customer Service record. This functionality facilitates notifications of changes to Customer Service request records to interested parties, e.g., a change to the status of a Service Request, or closing a Service Request

The functionality has been developed for Pathway UX and makes use of Pathway's ION-related framework. However, it does *not* recognise or require a software license for Infor OS (ION).

There are several configuration elements which are outlined below:

- **Systems Administration > System Parameter Maintenance**
- **Systems Administration > ION Parameters** – set up when the emails are triggered for changes to metadata on a Customer Service request
- **Customer Service > Parameters > Notifications > Email Template Maintenance** – set up the email template and associated merge and extract fields
- **Customer Service > Parameters > Notifications > Notification Type Maintenance** – set up the types of notifications available
- **Customer Service > Parameters > Notifications > Data Transformer Maintenance** – set up more advanced formatted email templates using XSL

#### ION Noun Verb Maintenance

The Publish verb has been made available against the *CustomerCall* noun within ION Noun Verb Maintenance. This allows the triggering of batch jobs to check whether notifications should be sent for the corresponding Customer Service request. It is recommended that sites nominate a business event job queue for processing that is *not* the primary business event job queue, to recognise performance impacts for regular ION processing.

ION Noun Verb Maintenance

Homepage / ION Parameter Maintenance / ION Noun Maintenance / ION Noun Verb Maintenance

ION Noun

Noun Name  
CustomerCall

Active

ION Verb/Noun (5+ results)

ION Verb [v] =	Direction	BOO Type [n] =	Service Operation [s] =	Business Event Job Queue [n] =	Active <input type="checkbox"/>	From [n] =
Acknowledge	input	Acknowledge.CustomerCall	ACRV4010.AcknowledgeCustomerCall		<input type="checkbox"/>	lid://
Sync	input	Sync.CustomerCall	ACRV4010.SyncCustomerCall		<input type="checkbox"/>	lid://
Process	input	Process.CustomerCall	ACRV4010.ProcessCustomerCall		<input checked="" type="checkbox"/>	lid://
Process	Output	Process.CustomerCall	ACRV4000.ProcessCustomerCall		<input type="checkbox"/>	lid://
Publish	Output	Publish.CustomerCall	ACRV4000.PublishCustomerCall	IONPUBLISH - ION Backgroup	<input checked="" type="checkbox"/>	lid://

Page 1 of 1+ 5 Records per page

Although an XML *Business Object Definition* (BOD) is not constructed for the *Publish* verb when triggered for the *ContactMaster* and *CustomerPartyMaster* nouns, a BOD's noun data is constructed when *Publish* is triggered for the *CustomerCall* noun. This is because the *CustomerCall* XML is used to:

- Extract e-mail addresses from request data for notification delivery.
- Provide filtering data to control notification triggering.
- Extract Pathway merge data for notification message content.

However, the noun data is *not* placed in the ION outbox – it is just generated by the handling service operation and used for internal notification processing. It is much like the noun for the existing *Sync.CustomerCall* in content.

### Business Object Definition Maintenance

This form and its subordinates, accessible from the **System Administration >> System Parameters >> ION Parameters** menu option, are used to define the conditions under which the *Publish* verb's service operation will be triggered. The release upgrade sets up a default business object definition, labelled *Auto Publish CustomerCall*, for this purpose.

Business Object Definition Maintenance

Homepage / ION Parameter Maintenance / Business Object Maintenance / Business Object Definition Maintenance

Business Object Definition (4 results) + Add → Business Object Verb/Noun → Business Object Entity ...

<input type="checkbox"/>	Entity [R] ▾	Initial Data <input type="checkbox"/>	Description *	Active <input type="checkbox"/>
<input type="checkbox"/>	ACRREQU	<input checked="" type="checkbox"/>	ACRREQU BED Object Initial Data	<input type="checkbox"/>
<input type="checkbox"/>	ACRREQU	<input type="checkbox"/>	Sync.CustomerCall(As at COG DoNotChange)	<input type="checkbox"/>
<input type="checkbox"/>	ACRREQU	<input type="checkbox"/>	Sync.CustomerCall	<input type="checkbox"/>
<input type="checkbox"/>	ACRREQU	<input type="checkbox"/>	Auto Publish CustomerCall	<input checked="" type="checkbox"/>

Page 1 of 1 5 Records per page

It is possible to associate the *Publish.CustomerCall* BOD type with a business object definition for another BOD type such as *Process.CustomerCall* or *Sync.CustomerCall*. However, this is strongly discouraged. The recommended approach is to change and activate the *Auto Publish CustomerCall* business object definition to represent the data modification events that require notifications to be sent.

Business Object Verb/Noun Maintenance

Homepage / ION Parameter Maintenance / Business Object Maintenance / Business Object Definition Maintenance / Business Object Verb/Noun Maintenance

Business Object Definition

Entity: ACRREQU Description: Auto Publish CustomerCall Initial Data:  Active:

Narrative: Check whether a request qualifies for an e-mail notification, and send to appropriate recipients if so.

ION Verb/Noun		Business Object Verb/Noun		
BOD Type [R] ▾	Direction [R] ▾	BOD Type [R] ▾	Direction [R] ▾	Active <input type="checkbox"/>
Process.ContactMaster	Output	Publish.CustomerCall	Output	<input checked="" type="checkbox"/>
Process.CustomerPartyMaster	Output			
Process.SourceSystemJournalEntry	Output			
Publish.ContactMaster	Output			
Publish.CustomerPartyMaster	Output			
Sync.PathwayApplication	Output			
Sync.PathwayLicence	Output			
Sync.PathwayProperty	Output			

Generally, the *Publish.CustomerCall* service operation should be activated when events such as request creation and request status update occur.

**Note:** The triggering of the *Publish.CustomerCall* service operation does not necessarily mean that notification processing will take place immediately. For example, if a request is still locked at the time the service operation is activated, no further processing will be undertaken. Instead, another job will be submitted to the business event job queue so that the request can be checked again later. Attempts to send an email will be made for up to three days if initially unsuccessful.

## Deploy Business Events

No associated functional changes have been made to the *Deploy Business Events* option in the System Administration >> System Parameters >> ION Parameters menu item, but it should be selected after setting up ION-related Business Event Notifications parameters. This is because, even though the new function does not place noun data in the ION outbox, *Deploy Business Events* is needed to analyse and deploy changes to the business object definition.

## Notification Type Maintenance

A new sub-menu, *Notifications*, has been added to the Customer Service >> Parameters menu. In turn, a new option, *Notification Type Maintenance*, has been added to that. This allows the definition of an ordered list of *CustomerCall* notification types to check when events defined in Business Object Entity Maintenance trigger the *Publish* verb's service operation. If the *Publish* verb is cleared for processing for a given request (that is, the request is not locked, and has the minimum data required), each notification type in the list will be checked in order, and, if the filter criteria are met, an e-mail message will be sent to each relevant contact. All messages sent are available for enquiry in both the System Administration >> System Parameters >> E-mail Message Enquiry menu option and the Customer Service >> Request Enquiry menu option (for the relevant request).

Notification Type Maintenance

Homepage / Notification Type Maintenance

Noun Name  
CustomerCall

Notification Types (4 results)

<input type="checkbox"/>	Notification Type Code *	Description *	Advanced Filter	Stop on Match
<input type="checkbox"/>	HWC	Hard Waste Collection Closure		<input type="checkbox"/>
<input type="checkbox"/>	FRC	Footpath Repair Closure		<input type="checkbox"/>
<input type="checkbox"/>	PRCR	Pothole Repair Created	DM_REQ_NEW - Request Created (Filter)	<input type="checkbox"/>
<input type="checkbox"/>	PRCL	Pothole Repair Closure	DM_REQ_COMP - Request Completed (Filter)	<input type="checkbox"/>

Page 1 of 1 15 Records per page

Contacts (2 results)

<input type="checkbox"/>	Role Type	Data Source	E-mail Template *
<input type="checkbox"/>	Customer		DM_ACK_TXT - Acknowledgement Text Email
<input type="checkbox"/>	Other Affected Person - Customer		DM_HTML - HTML E-mail

Page 1 of 1 15 Records per page

## Noun Name

This is a reminder of the business object that the notification types apply to. Currently, notifications only apply to the *CustomerCall* noun.

## Notification Types

This grid holds basic information about each notification type. It allows the rows to be ordered using the *Up* and *Down* buttons in the selection toolbar, and the sequence determines which notification types are considered first when processing the *Publish* verb.

- **Code** – a short identifier for the notification type composed of uppercase alphanumeric characters.
- **Description** – up to fifty mixed-case characters further describing the notification type.
- **Advanced Filter** – a data transformer (see next section) with an Output Type value of *Filter* that simply returns the text *true* or *false* based on the contents of the *CustomerCall* noun. A notification (or notifications) will be sent if the transformer returns true. Any details specified using the Filter button (see later) are ignored if an Advanced Filter value is specified.
- **Stop on Match** – if set, indicates that no further notification types should be considered during *Publish* processing if the current notification type's filtering conditions are satisfied.
- **Active** – if set, indicates that the notification type should be considered during *Publish* processing.

## Contacts

This grid applies to the currently selected notification type. It associates Customer Service request contacts with e-mail templates that determine the layout and content of the messages the contacts will receive for the notification type.

- **Name Role Type** – one of the Name and Address Register role types listed within Customer Service >> Parameters >> Role Type Filter. At notification time, if the name role type doesn't apply to the request type for the relevant Customer Service request, it is ignored.
- **Data Source** – a data transformer (see the Data Transformer Maintenance section) with an Output Type value of *Contacts* that provides contact e-mail addresses from the ION noun for the *Publish* verb. Either this or Name Role Type will be required, but not both.

- *E-mail Template* – a mandatory template definition (see later) that determines the layout and content of the contact’s notification message.
- *Primary Contact Only?* – if set, indicates that only the first contact in a possible list of contacts for the name role type or data source will be sent the notification message. If the first contact has no e-mail address, the next contact in the list (if any) is sent the message.

On the Notification Types grid, the *Filter* button applies to the currently selected notification type. It displays a modal form allowing filtering criteria to be specified that determine whether the Customer Service request for which the *Publish* verb is being processed should trigger a notification.

- *Event* – a dropdown that determines which request conditions or changes can trigger a notification. The allowed values are:
  - *Created* – this is the first time the request has been cleared for *Publish* verb processing.
  - *Closed* – the request has been cleared for *Publish* verb processing and its System Completion Date value has been newly populated.
- *Request Types* – a swap-list that allows selection of request types to which the notification message(s) should apply. If no request types are selected, it is assumed that the notification applies to all types.
- *Request Statuses* – a swap-list that allows selection of request statuses to which the notification message(s) should apply. If no request statuses are selected, it is assumed that the notification applies to all statuses.

## Data Transformer Maintenance

A Data Transformer Maintenance menu option has been added to the new Customer Service >> Parameters >> Notifications menu. This allows customer sites to define transformations in eXtensible Stylesheet Language (XSL) to be applied to *CustomerCall* ION noun data. In turn, this enables the construction of sophisticated HTML and plain text message templates, and allows advanced filtering when checking whether a notification should be sent at all. The version of XSLT (XSL Transformations) used is 1.0, as that is what is available with the .NET Framework.

The screenshot displays the 'Data Transformer Maintenance' application window. At the top, there is a navigation bar with 'Data Transformer Maintenance' on the left and 'Save', 'Undo', 'Delete', and a menu icon on the right. Below the navigation bar, the main configuration area includes:

- Noun Name:** A text box containing 'CustomerCall'.
- Data Transformer Code:** A dropdown menu showing 'PCHWCC-HTML'.
- Description:** A text box containing 'Primary Customer HWCC HTML'.
- Output Type:** A dropdown menu showing 'HTML'.
- Active:** A toggle switch currently set to 'Active'.

Below the configuration area, there are three tabs: 'XSLT Editor', 'Testing', and 'Preview'. The 'XSLT Editor' tab is active, showing an XSLT code editor with the following content:

```

1 <?xml version="1.0" encoding="UTF-8"?>
2 <xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
3
4   <xsl:output method="html" indent="yes"/>
5
6   <xsl:template match="/">
7     <xsl:text disable-output-escaping='yes'>&lt;DOCTYPE html&gt;&#x2013;</xsl:text>
8     <html lang="en" xmlns="http://www.w3.org/1999/xhtml" xmlns:o="urn:schemas-microsoft-com:office:office">
9       <head>
10        <meta charset="UTF-8"/>
11        <meta name="viewport" content="width=device-width,initial-scale=1"/>
12        <meta name="x-apple-disable-message-reformatting"/>
13        <title></title>
14        <xsl:text disable-output-escaping='yes'>&#x2013;</xsl:text>
15        <xsl:comment>
16          <![CDATA[if mso]
17            <noscript>
18              <xml>
19                <o:OfficeDocumentSettings>
20                  <o:PixelsPerInch>96</o:PixelsPerInch>
21                </o:OfficeDocumentSettings>
22              </xml>
23            </noscript>
24          <![endif]]>
25        </xsl:comment>
26        <xsl:text disable-output-escaping='yes'>&#x2013;</xsl:text>
27        <style>
28          table, td, div, h1, p {font-family: Arial, sans-serif;}
29        </style>
30      </head>

```

## Noun Name

This is a reminder of the business object to which the data transformer applies. Currently, data transformers only apply to the *CustomerCall* noun.

## Data Transformer Code

A short identifier for the data transformer composed of uppercase alphanumeric characters.

## Description

Up to fifty mixed-case characters further describing the data transformer.

## Active

If set, indicates that the data transformer is available for selection against notification types and e-mail templates.

## Output Type

A dropdown that indicates the format in which the XSLT transformer will output converted *CustomerCall* XML data. The allowed values are:

- *Contacts* – the output will be an XML list of contact details extracted from the BOD, conforming to the following schema:

```
<xs:schema attributeFormDefault="unqualified"
  elementFormDefault="qualified"
  xmlns:xs="http://www.w3.org/2001/XMLSchema">
  <xs:element name="contacts">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="contact" maxOccurs="unbounded" minOccurs="0">
          <xs:complexType>
            <xs:sequence>
              <xs:element type="xs:string" name="name"/>
              <xs:element type="xs:string" name="email"/>
              <xs:element type="xs:string" name="mobile"/>
            </xs:sequence>
          </xs:complexType>
        </xs:element>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
</xs:schema>
```

- *Filter* – the output will be a simple text value of *true* or *false*, based on the *CustomerCall* contents.
- *HTML* – the output will be HTML for an e-mail message body incorporating elements from the ION noun contents, possibly in list structures where appropriate. Fields equivalent to the {{ IMAGE }} fields used in e-mail templates are supported so that inline images can be properly incorporated within messages generated from the HTML content.
- *Text* – the output will be text for an e-mail subject or message body incorporating elements from the ION noun contents.

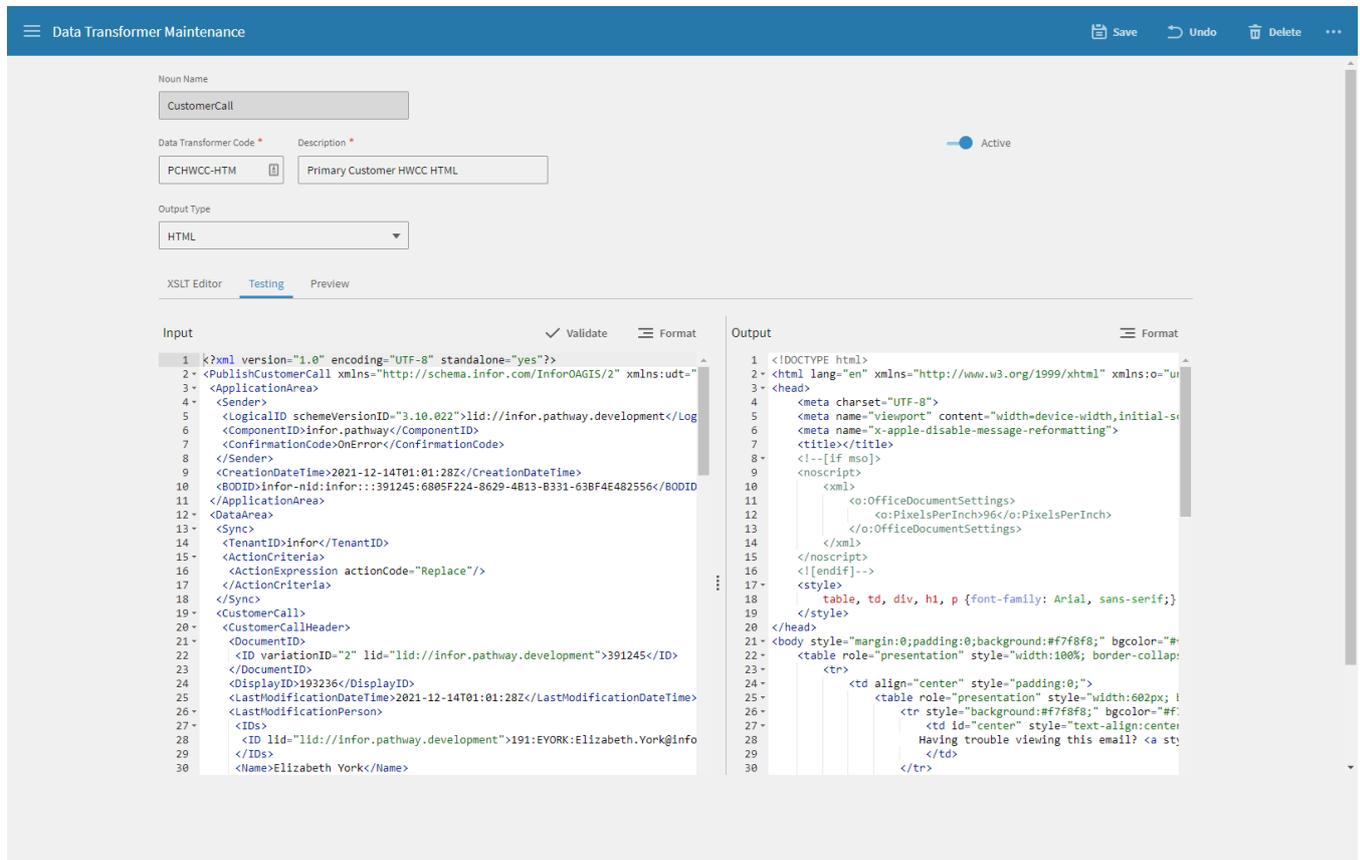
## XSLT Editor

This tab allows editing of the XSLT code that describes the transformation that will be applied to the *CustomerCall* XML. It reflects the design of the corresponding mapping editor tab in ION Desk. The editor incorporated within Pathway UX provides syntax highlighting and checking among other advanced editor functions. The buttons above the editor process the XSLT code as follows:

- *Validate* – checks that the XSLT code is correct and displays an error dialog giving relevant information if not.
- *Format* – indents the XSLT code as per XML conventions.

## Testing

This tab provides a dual panel, divided by a splitter control, for testing the transformation coded in the XSLT Editor tab. Again, it reflects the design of the corresponding mapping editor tab in ION Desk:



On the left side (Input), a sample *CustomerCall* XML document is displayed formatted and highlighted in an editor control. On the right side (Output), the result of applying the XSLT to the sample XML is displayed, also formatted, and highlighted (where applicable) in an editor control. Whenever the user changes the Input value, the transformation is automatically applied to it to produce an updated Output value. For new data transformers, the left side is recognized with a default *CustomerCall* document. Any changes made to the sample XML are retained when the data transformer is saved. The button above the editor processes the Input XML:

- *Format* – indents the XML code as per conventions.

## Preview

This tab applies when the Output Type field value is *HTML*. If selected, an inline frame within the tab renders the current HTML code in the Testing tab's Output panel editor, showing the user what an e-mail based on the data transformer would look like:



### Service Request Resolved

Your **Hard Waste Collection** issue has been actioned.

The following property locations have recently been attended to:

- 2 Main Street, Pleasantville SA 5999
- 2a Main Street, Pleasantville SA 5999

We would really value your feedback regarding your service experience. The linked survey contains only three questions, and should take thirty seconds to complete. Thank you for your time!

[Start Survey](#)

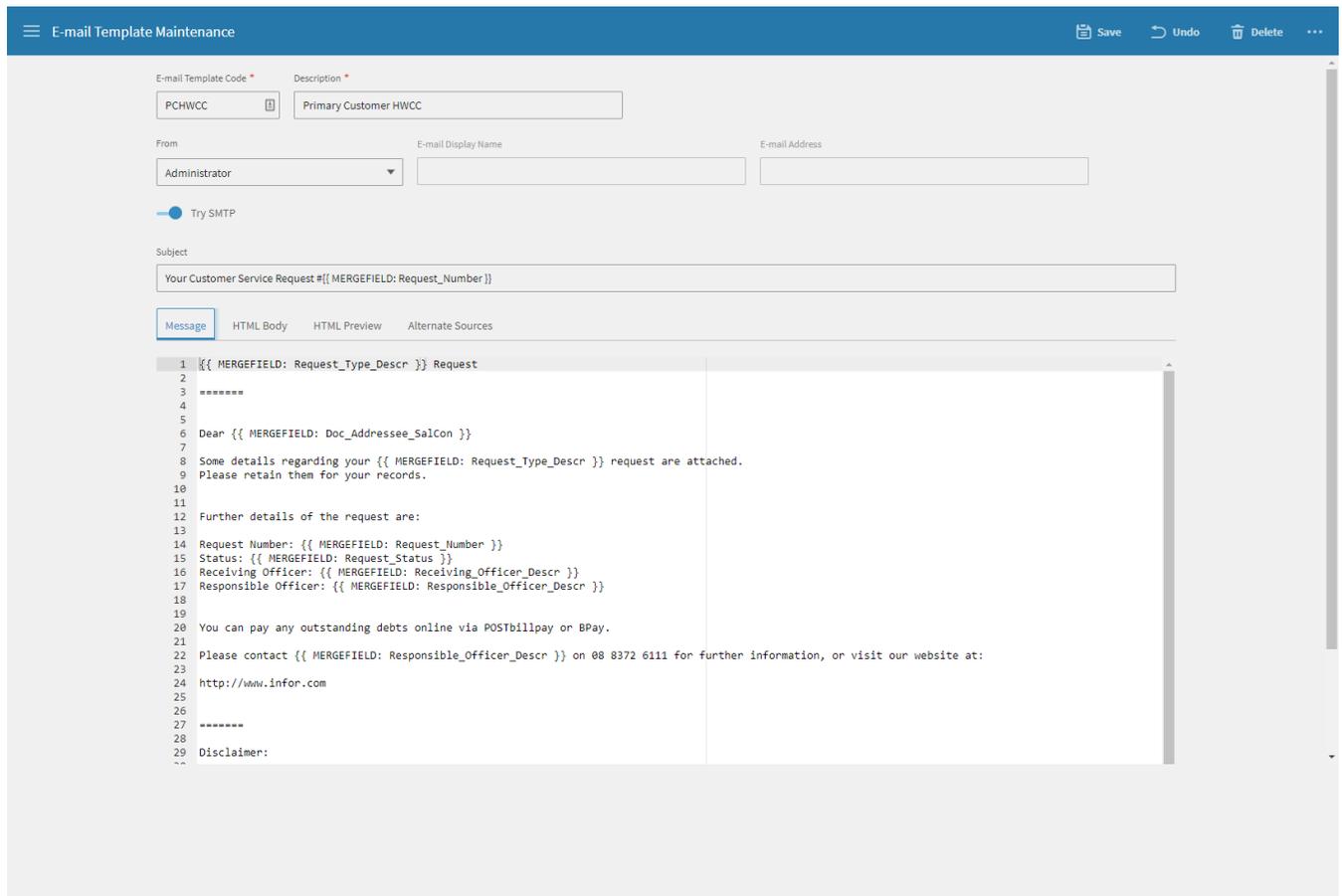
© Infor Australia, 2022



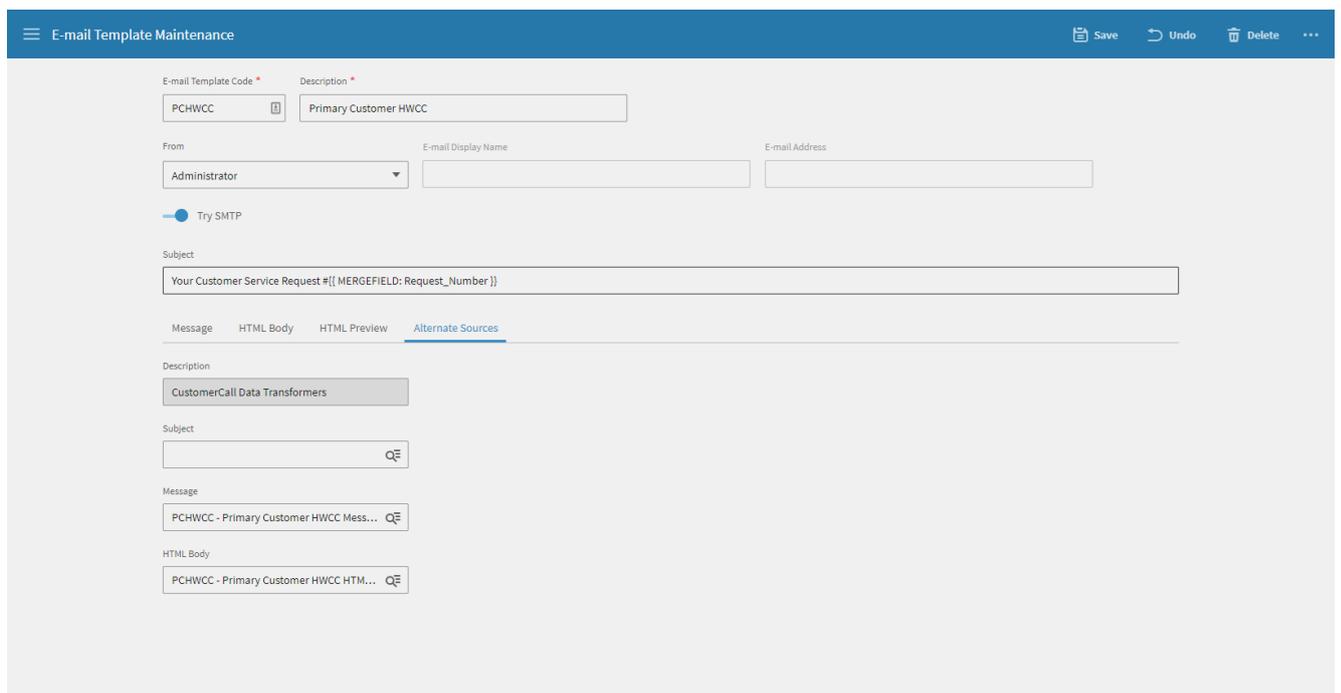
### E-mail Template Maintenance

Previously, the E-mail Template Maintenance form has only been accessible from Merge Type Maintenance, when selecting an e-mail template to associate with a document for electronic delivery. E-mail Template Maintenance, as a child of its corresponding search profile form, has now been added as a menu option beneath the Customer Service >> Parameters >> Notifications menu. Instead of giving access to e-mail templates associated with merge types, it gives access to e-mail templates associated with the *CustomerCall* noun.

The layout of the E-mail Template Maintenance form has been changed to make it more reminiscent of a traditional e-mail message:



The *Message* field has been moved to its own tab, and the editor control changed to provide a slightly richer, more intuitive experience. The editor for the *HTML Body* field has also been changed so that it provides syntax highlighting and error checking. For the *CustomerCall* noun, an *Alternate Sources* tab is now displayed:



The fields on the tab are as follows:

- *Description* – a read-only field indicating that the alternate sources can be data transformers for the *CustomerCall* noun.
- *Subject* – an optional field allowing selection of an active data transformer with an output type of *Text*.
- *Message* – an optional field allowing selection of an active data transformer with an output type of *Text*.
- *HTML Body* – an optional field allowing selection of an active data transformer with an output type of *HTML*.

Where any optional fields have been specified, the value supplied by the alternate data source will override whatever would have been generated for the corresponding standard template field.

### Integration Impact

The *CustomerCall* noun included within the new ION *Publish* BOD now incorporates extra data under the *UserArea* element so that certain merge field values can be extracted from it when generating e-mails.

The following Property elements have been created:

NAME	COMMENTS
pathway.ReceivingOfficerUserID	There is a user ID value beneath the <i>CallTakenByPerson</i> element in <i>CustomerCall</i> , but no user description there. The latter is now held in the <i>Description</i> element for the new property and used to populate the <i>Receiving_Officer_Descr</i> merge field.
Pathway.RequestTypeCode	There is a request type code beneath the <i>CallTypeCode</i> element in <i>CustomerCall</i> , but no type description. The latter is now held in the <i>Description</i> element for the new property and used to populate the <i>Request_Type_Descr</i> merge field.
Pathway.ServiceDate	The property value is the <i>Service Date</i> field value from the request in ISO 8601 format, e.g., '2020-11-30'. This value only applies to <i>Request for Service</i> requests. It is used to populate the <i>Service_Date</i> merge field.
Pathway.CompletionDateTime	The property value is the <i>System Completion Date</i> field value from the request in ISO 8601 UTC format, e.g., '2020-11-30T06:29:34Z'. It is used to populate the <i>System_Completion_Date</i> and <i>System_Completion_Time</i> merge fields.
Pathway.EnteredDateTime	The property value is the <i>System Date Entered</i> field value from the request in ISO 8601 UTC format. It is used to populate the <i>System_Date_Entered</i> and <i>System_Time_Entered</i> merge fields.
Pathway.VisibleToPublic	The property value is the <i>Available to Public</i> field value from the request as the word 'True' or the word 'False'. It is used to populate the <i>Visible_To_Public</i> merge field.

There is also an added property that doesn't correspond to a merge field, and it exists to make event detection easier.

NAME	COMMENTS
pathway.CompletionStatus	The property value is the <i>Completion Status</i> field value on the status against the request as the word 'No', 'Hold', or 'Yes'.

In addition, a non-Property element has been added under the *UserArea* element. It is a copy of the *CustomerCall* element from the previous BOD considered for notification processing for the request (if any), with a different namespace (and hence element prefix) applicable:

```
<pre:CustomerCall xmlns:pre="http://schema.infor.com/Pathway/BeforeImage">
  <pre:CustomerCallHeader>
    <pre:DocumentID>
```

```
<pre:ID variationId="2" lid="//infor.pathway.development">391245</pre:ID>
</pre:DocumentID>
<pre:DisplayID>193236</pre:DisplayID>
<pre:LastModificationDateTime>2022-01-31T01:01:28Z</pre:LastModificationDateTime>
<pre:LastModificationPerson>
<pre:IDs>
```

...

This allows comparisons between current and previous values considered for notification processing within XSLT, which helps (for example) determine when events such as request status changes have occurred.

# Debtors

## Enhancements

### Archive/Purge Run Enquiry

Incident: UX Client	Work Item: 2151 KB:	Fix: ERS:
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#### ARCHIVE/PURGE RUN ENQUIRY

This menu option has now been included on the Pathway menu under **Debtors >> Housekeeping**. Improvements have been made to the UX Client version including:

- A Search Profile is now available, allowing searching over Run Date, Run Code and Run Description.
- The Media details and Run Note are visible on the main form, avoiding the need to open another form.

# ePathway System

## Enhancements

### ePathway My Home Animal Details

Incident: UX and Smart Clients	Work Item: 56941 KB:	Fix: ERS:
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#### EXCLUDE INTERNAL AND POTENTIALLY CONFUSING IDS

Customers have requested the removal of the Animal Id and Online Reference fields from the animal details displayed on registered users My Home page citing that the first is exposing an internal id and the latter is potentially confusing customers who wish to use BPay. As such both fields are no longer displayed.

### ePathway My Home Animal Details

Incident: UX Client	Work Item: 57021 KB:	Fix: ERS:
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#### INTERNAL ANIMAL LOCATION

The animal location (property role) is now included with the animal details displayed on registered users My Home page.

# ePathway Animal Registration

## Enhancements

### ePathway Animal Registration

Incident: UX and Smart Clients	Work Item: 56615 KB:	Fix: ERS: 76165
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#### VALIDATION ON ANIMAL PHYSICAL ID

The Animal's Physical ID can now be validated to ensure it is unique and does not already exist in the database. This feature can be switched on/off using the **Animals.ValidatePhysicalId** System Setting.

# ePathway Applications

## Enhancements

### ePathway Application and Licensing Lodgement

Incident: UX and Smart Clients	Work Item: 56024 KB:	Fix: ERS: 60709
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#### REFERENCE FIELDS NOW AVAILABLE FOR EPATHWAY APPLICATION/LICENSING LODGEMENT

It is now possible to use reference fields on ePathway Application/Licensing page layouts to prompt for values.

E.g. If a council uses a reference to hold the Victorian Building Authorities 'BAMS' number against an application, they can now use that reference type to prompt a customer during Application lodgement. The entered value will then be recorded as the reference value on the submitted Application.

All reference types assigned to the Application/Licensing class (where their sharing state is "Any") are made available as fields.

Note that the steps to use this new functionality are:

1. Assign the desired reference type to the Application/Licensing class (as "Any") if it is not already.  
E.g. via Applications >> Application Parameters >> [CLASS] >> References

The screenshot shows the 'Reference Type Maintenance' interface. At the top, there are navigation icons (back, menu) and actions (Save, Add, Remove, Alpha Sort). Below the header, the 'Class Details' section shows the description 'Building and Planning'. The main part of the interface is a table with the following data:

Reference Type	Description	Sharing	Active
APPNO	Approval Number	One	<input checked="" type="checkbox"/>
KJREF21	Ref Type 21 (UX) - LAP(1) + Class	One	<input checked="" type="checkbox"/>
KJREF24	Ref Type 24 (UX) - LAP(M)	Many	<input checked="" type="checkbox"/>
KJREF25	Ref Type 25 (UX) - LAP(1)	One	<input checked="" type="checkbox"/>
BAMS	Victorian Building Authorities 'BAMS' number	Many	<input checked="" type="checkbox"/>
XREF	Reference Type	One	<input checked="" type="checkbox"/>
APPLNUMBER	Old Application Number	One	<input checked="" type="checkbox"/>
COURTD	Court Date	One	<input checked="" type="checkbox"/>
BA	OLD B&A NUMBER	Many	<input checked="" type="checkbox"/>

2. Go to Application/Licence field maintenance to auto-generate the reference fields  
E.g. via System Administration >> ePathway >> Application Lodgement Parameters >> Lodgement Field Maintenance
3. For each type, the reference fields can then have their active status modified  
E.g. via System Administration >> ePathway >> Application Lodgement Parameters >> Application Class and Type Maintenance >> [CLASS] >> [TYPE] >> Fields

← Application Type and Field Maintenance

Class Details  
Class  
1PCTA - Building Applications

Application Type Details  
Application Type  
EMTYPE - Em's Application Type

XML Tag Name	Description	Mandatory	Active	Conditional Field
mincatdims_1pcta_emcat_stand_stand1	Standard Application Dimension 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
reference_epwuser	ePathway User	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
reference_re2	many ref type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
reference_z10	type 10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
reference_z1manypw3	LAP - PW3 One to Many	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
reference_rf02	Ref Type 02 (LAP - Many)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
reference_epwtref	Transaction Reference	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
reference_emref	Email (Em Test)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
reference_dons	Don's Reference 1PCTA	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
reference_bec	Becs reference test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Export the new fields to ePathway.  
E.g. System Administration >> ePathway >> System Processing >> Web Server Export >> Application Field Export & Application Field Types Export

Export Control

Homepage / Export Control

[Search Profile](#)

Export to Web Server (38 results)

<input type="checkbox"/>	Function Export
<input type="checkbox"/>	Application Type Export
<input checked="" type="checkbox"/>	Application Field Export
<input checked="" type="checkbox"/>	Application Field Types Export

- In ePathway, select the new fields where desired on the Page Layout  
E.g. ADMIN >> Layout >> Page Layout >> ePathway Application Lodgement >> [CLASS] >> [TYPE] Pages

**Application Class** Building and Planning  
**Application Type** Application Type 1  
**Page** A1  
**Group** References

Hover Text	Min. Value	Data	Boolean	Same	Display
<input type="text"/>					
<input type="text"/>					
<input type="text"/>					
<input type="text"/>					

New/Used Materials  
 Number of Storeys  
 Number of Units  
 Poles(Including Calculation Field)  
 Pre-existing Dwellings  
 Private Certifier  
 Proposed Development  
 Rainwater Tank  
 Responses  
 Roof  
 Septic  
 Site Description  
 Solar Hot Water  
 Strata Consent Group  
 Sub Division 1  
 Sub Division 2  
 Trade List  
**Victorian Building Authorities 'BAMS' number**  
 Wall3456  
 Width(Including Calculation Field)

## ePathway Attachment Types

Incident: UX and Smart Clients	Work Item: 56604 KB:	Fix: ERS: 74043
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### ATTACHMENT TYPE OVERRIDES FOR EPATHWAY LODGEMENTS

Previously all attachments provided by users creating Customer Requests, Licences, License Responses, Applications, Application Responses or Animal Registrations via ePathway would all be created with the default attachment type for that module.

It is now possible to specify an override attachment type to be used for ePathway via parameters. Lodgements made against types (or classes for Animals) with overrides will have any attachments created with the nominated override attachment type instead of using the module wide default.

Note that the override can be nominated on each of the ePathway type/class parameter forms:

- System Administration >> ePathway >> Application Lodgement Parameters >> Application Class and Type Maintenance
- System Administration >> ePathway >> Licence Entry Parameters >> Licence Class and Type Maintenance
- System Administration >> ePathway >> Animal Registration Parameters >> Animal Type and Class Maintenance
- System Administration >> ePathway >> Customer Request Parameters >> Customer Request Type Maintenance

# ePathway General Enquiry

## Enhancements

### ePathway Application/Licensing General Enquiries

Incident: UX and Smart Clients	Work Item: 56025 KB:	Fix: ERS: 60711
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#### EPATHWAY GENERAL ENQUIRY APPLICATIONS/LICENCING - ADDITIONAL DATA EXPOSURE

The ePathway General Enquiry for Applications and Licencing has expanded to include fields for References, Dimensions, Major Categories, Questionnaires, Minor Categories, Minor Dimensions and Related Applications/Licences details.

It should be noted that the additional fields are not exposed unless actively selected in Page Layout for configuration. See later screen images for examples of selecting the fields and associated filtering.

Some of the additional fields have a Pathway hierarchy which is reflected in the enquiry output.

- Related Applications/Licenses
- References
- Dimensions (Licensing, Applications, Development, Subdivisions, Building Classifications)
- Major Categories
  - Questionnaires
  - Minor Categories
    - Minor Dimensions

#### EXPOSING THE NEW FIELDS

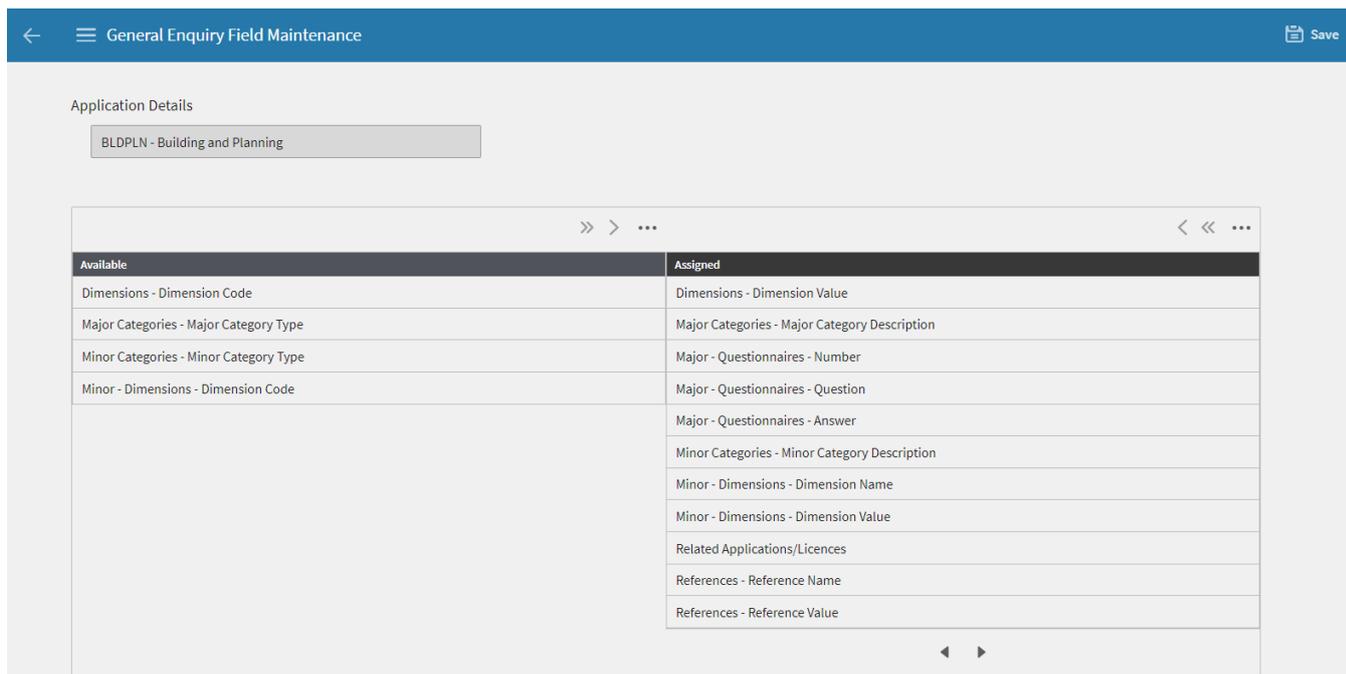
Before any of the new fields can be used within ePathway, they first need to be selected for the intended Application/Licence class. This is done via the Application/Licensing Enquiry Field Maintenance forms.

The fields available and the hierarchy are represented here, where the Column and Column Tree types represent the group/header whilst the Fields are the individual data items that can be shown where indentation indicates the preceding column is the parent.

FIELD TYPE	FIELD	COMMENT
Column	Related Applications/Licences	When selected in ePathway will allow selection of an Enquiry List to determine the layout
Column	References	
Field	- Reference Name	Description of the reference type
Field	- Reference Value	The actual reference value
Column	Dimensions	
Field	- Dimension Type	Used for Applications only to indicate Application, Development, Subdivision or Building Classification dimension types.
Field	- Dimension Code	Pathway internal code for dimension. (Recommend not including)

FIELD TYPE	FIELD	COMMENT
Field	- Dimension Name	Dimension description.
Field	- Dimension Value	Dimension value.
Column Tree	Major Category	
Field	- Major Category Type	Pathway internal code for category. (Recommend not including)
Field	- Major Category Description	Major category description. Must be included for any of the subsequent fields as the collapsible tree structure hangs off this field.
Column	- - Questionnaires	
Field	- - - Question Number	Question number
Field	- - - Question Text	Question
Field	- - - Question Answer	Answer(s). Will show as "Undefined" if not answered.
Column Tree	- - Minor Category	
Field	- - - Minor Category Type	Pathway internal code for category. (Recommend not including)
Field	- - - Minor Category Description	Minor category description. Must be included for minor dimension fields collapsible tree structure.
Column	- - - Minor Dimensions	
Field	- - - - Minor Dimension Code	Pathway internal code for category. (Recommend not including)
Field	- - - - Minor Dimension Name	Dimension description.
Field	- - - - Minor Dimension Value	Dimension value.

Use the following forms to add the new Column groups and fields to ensure they are available for display on the chosen Classes:



System Administration >> ePathway >> General Enquiry Parameters >> Applications/Licencing Enquiry Parameters >> Application/Licencing Enquiry Field Maintenance

Once the desired fields have been chosen, it is important to Export the fields to ePathway so they can then be selected on the layout forms:

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

#### FILTERING THE DATA TYPES WITH ENQUIRY LISTS

The Enquiry List parameter forms can be used to apply filtering to each data type. To secure against unintended exposure, by default no selection means no inclusion, i.e. not selecting any types does not default to all. Each type must be actively chosen for inclusion.

The Enquiries List Maintenance form now includes References, Dimensions and Major Categories (which within it allows selection of questionnaire, minor categories, and dimensions).

☰ General Enquiries List Maintenance

Display Options - Detail Page

E-mail Primary Responsible Officer

E-mail ePathway Contact ⋮

Allow Further Information

Allow Referral Response

Allow Objection

Allow Public Objection

[Name Roles](#)

[Workflow Tasks](#)

[Merge Types](#)

[References](#)

[Dimensions](#)

[Major Categories](#)

System Administration >> ePathway >> General Enquiry Parameters >> Applications/Licensing Enquiry Parameters >> Application/Licensing Enquiry List Parameters

Each filtering form then allows selection of types to expose. For instance, for Major Categories we get to choose each category and whether the Questionnaire details are exposed.

Available Major Category Types Maintenance

Application Details

BLDPLN - Building and Planning

List Details

BLDPLN All Building and Planning Types - No selection

Available Major Categories		Assigned Major		Public?	
A5	Major Development Category 5 (with Minor/Ques)	A1	Major Dev. Category 1 (with Minor/Ques/Conds)	<input checked="" type="checkbox"/>	...
A6	Major Development Category 6 (with Minor/Ques)	A2	Major Dev. Category 2 (with Minor/Ques/Conds)	<input checked="" type="checkbox"/>	...
A7	Major Development Category 7 (with Minor/Ques/Conds)	A3	Major Development Cat 3 (with Minor/Ques/Conds)	<input checked="" type="checkbox"/>	...
A8	Major Development Category 8 (with Ques)	A4	Major Development Cat 4 (with Minor/Ques)	<input checked="" type="checkbox"/>	...
A9	Major Dev. Category 9 (nothing)	B1	Major Development Category B1 (with Ques/Conds)	<input checked="" type="checkbox"/>	...
B3	Major Development Category B3 (nothing)	B2	Major Dev. Category B2 (nothing)	<input type="checkbox"/>	...
B4	Major Development Category B4 (nothing)				
B5	Major Development Category B5 (nothing)				
B6	Major Development Category B6 (nothing)				
B7	Major Development Category B7 (Conditions)				
B8	Major Development Category B8 (nothing)				

Further selection can be made for the assigned types to choose the minor categories within (and then minor dimensions within that).

For Application Dimensions (top level, not Minor) each Dimension code and description is tagged to indicate what type of dimension is being chosen. The code is prefixed with a single character and dash (E.g. D- for Development Data Dimensions, S- for Subdivision Data Dimensions, etc) whilst the description has it suffixed in brackets to make it clear. If dimensions are chosen across multiple types, it is highly recommended that the Dimension Type column is chosen in the layout to ensure these are grouped/labelled appropriately on the enquiry.

Available Dimension Types Maintenance

Application Details

BLDPLN - Building and Planning

List Details

BLDPLN All Building and Planning Types - No selection

Available Dimensions		Assigned Dimensions	
A-*(&J)	Dimension 3 (Application)	A-LIGHTS	Lights (Application)
A-CJTEST	Test Automation ### (Application)	A-MULTI	multi test for the one dimension (Application)
A-ECWORK	Estimated cost of Work (BLDPLN) (Application)	A-WIDTH	Width (Application)
A-F1	Format 1 *.## (Application)	C-AREA	Area (Building Classification)
A-F2	Format 2 ### (Application)	C-EST	Estimate (Building Classification)
A-F3	Format 3 ** (Application)	C-GEAREA	Gross Existing Floor Area (BPDPLN) (Building Classification)
A-F4	Format 4 (#)(#) (Application)	C-OTHER	Other (Building Classification)
A-F5	Format 5 *,.(#)(#) (Application)	D-DEV1	Development 1 (BP Development Data)
A-FACES	Faces (Application)	D-DEV2	Development 2 (BP Development Data)
A-FORMAT	Format Test (Application)	S-SUB1	Sub Division 1 (BP Subdivision Data)
A-PATS	pats dimension (Application)	S-SUB2	Sub Division 2 (BP Subdivision Data)

### ADDING NEW DATA TO THE LAYOUT

Once the earlier chosen fields are exported, the ePathway administrator user can determine the layout on the enquiry forms including related applications/licensing lists.

**Enquiry List Page Groups**

This page shows the Enquiry Lists for your selected Pathway Module.

Module: LAP Pathway Module  
List: All Building and Planning Types - No selection (Detail View)

Seq.	Title	Image	Instructions	Type	Label Width	Label Alignment	Omit Null	Secure	Child Group	Delete
1	Main Details	Uri Text		Field	150	Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Layout <input type="checkbox"/>
2	Name Details	Uri Text		Column			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Layout <input type="checkbox"/>
3	Type and Number	Uri Text		Field	150	Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Layout <input type="checkbox"/>
4	Property Details	Uri Text		Column			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Layout <input type="checkbox"/>
6	Decision Details	Uri Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Layout <input type="checkbox"/>
7	Consents	Uri Text		ColumnTree			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Layout <input type="checkbox"/>
8	Dimensions	Uri Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Layout <input type="checkbox"/>
9	References	Uri Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Layout <input type="checkbox"/>
10	Major Categories	Uri Text		ColumnTree			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Layout <input type="checkbox"/>
11	Related Applications	Uri Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Applications (BLDPLN): All Building and Planning Types - No selecting <input type="checkbox"/>
12	Related Licences	Uri Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Licences (DCAT): Testing if conflicts with LAP <input type="checkbox"/>

Cancel Add a group into this enquiry Update

ADMIN >> Layout >> Page Layout >> ePathway General Enquiry - Applications/Licencing >> Detail

Be sure to utilise the "Omit Null" checkbox column above to only include those Column/Column Tree sections if there is data present.

The Related Applications/Licences columns allow selection of the Enquiry List to be used to present them. The "Summary" layout of the chosen Enquiry List is used to present the related matches much in the same way as this concept was introduced on the Property enquiry forms.

Note that it is recommended that only the description is added for the Major/Minor Category layout as shown below. Choosing to include the type will expose the internal code but also likely require additional CSS changes to tidy the formatting. (See last section for how this can be done).

**Enquiry List Page Group Layout**

This page defines layout for your selected Enquiry List Page Group.

Module: LAP Pathway Module  
List: Public Consultation (Detail)  
Group: Major Categories

Add Fields: All Fields Remaining Fields only

Seq.	Field Label	Label Override	Date Type	Width	Hover Text	Alignment	Wrap/Height	Boolean Display	Sort Field	Sort Order	Display Total	Secure	Layout	Delete
1	Major Category Descr	<input type="checkbox"/>	String	200		Left	<input type="checkbox"/>					<input type="checkbox"/>	Layout <input type="checkbox"/>	<input type="checkbox"/>

Cancel View the Result Add Fields (choose from the following list) Continue

Major Category Type

Within the Major Category we can then choose to display the Questionnaire and/or Minor Categories. Further layout decisions can then be made within for field selection and inclusion of Minor Category Dimensions.

**Enquiry List Page Group Layout**

This page defines layout for your selected Enquiry List Page Group.

Module: LAP Pathway Module  
 List: All Building and Planning Types - No selection (Detail)  
 Group: Major Categories

Add Fields:  All Fields  Remaining Fields only

Seq.	Field Label	Label O'ride	Data Type	Width	Hover Text	Alignment	Wrap/ Height	Boolean Display	Sort Field	Sort Order	Display Total	Secure	Layout	Delete
1	Questionnaires	<input type="checkbox"/>	Column	200	<input type="text"/>	Left						<input type="checkbox"/>	Layout	<input type="checkbox"/>
2	Minor Categories	<input type="checkbox"/>	ColumnTree	200	<input type="text"/>	Left						<input type="checkbox"/>	Layout	<input type="checkbox"/>

**GENERAL ENQUIRY PRESENTATION OF NEW DATA**

Below is an example of how the layout can be presented. Only Major Categories which include sub-data (Questionnaires and/or Minor Categories) will be shown as expandable and Related Applications/Licences will have links to open a new window to show their details.

References	
Reference Name	Reference Value
Approval Number	REF98712345
OLD B&A NUMBER	OLD NUMBER
Victorian Building Authorities 'BAMS' number	12345678

Major Categories	
Major Category Description	
<input checked="" type="checkbox"/>	Major Dev. Category 1 (with Minor/Ques/Conds)
<input checked="" type="checkbox"/>	Major Dev. Category 2 (with Minor/Ques/Conds)
<input checked="" type="checkbox"/>	Major Development Cat 3 (with Minor/Ques/Conds)
	Major Development Cat 4 (with Minor/Ques)

Related Applications					
Application Class	Formatted Application Number	Location Address	Status	Formatted Application Location	Application Description
Building and Planning	206/2010/AT1/1	27 Abbott Street	None	27 Abbott Street, REYNELLA SA 5180	ePathway
Building and Planning	207/2010/AT1/1	27 Abbott Street	None	27 Abbott Street, REYNELLA SA 5180	ePathway
Building and Planning	826/MULTI/5	27 Abbott Street	Approved	27 Abbott Street, REYNELLA SA 5180	ePathway
Building and Planning	219/2010/AT1/1	27 Abbott Street	None	27 Abbott Street, REYNELLA SA 5180	ePathway

Related Licences						
Formatted Licence Number	Formatted Licence Location	Licence Number	Licence Year	Status	Licence Class	Licence Type
183/1998/001/BRD	"Golden Oldies Nursing Home", 1-15 Gin and Tonic Street, EASTWOOD	183	1998	Reminder Notice issued	Food Act Reporting Licence Class	Boarding House

We can see below how a Major Category presents when fully expanded. It is worth reviewing the last section of this document which shows the CSS changes that ensure reduced field padding and indentation of the Minor Category tree which provides a clearer presentation.

**Major Categories**

Major Category Description

- Major Dev. Category 1 (with Minor/Ques/Conds)
- Major Dev. Category 2 (with Minor/Ques/Conds)
 

Number	Question	Answer
1	Hi this is a boolean question which happens to have a lot of text associated with it. Please feel free to ignore most of the waffle from this point forwards unless you really, really want to add being frustrated to your daily routine. Do you really want that?	Yes
2	Select the most appropriate answers	It's the weekend, Today ends in Y
3	Do you want to answer this question?	Undefined
- Minor Category Description
  - M2 Minor 1
 

Name	Value
M2 M1 Dimension 1	35
M2 M1 Dimension 4	1200
  - M2 Minor 2
  - M2 Minor 3
- Major Development Cat 3 (with Minor/Ques/Conds)
- Major Development Cat 4 (with Minor/Ques)

For Application level Dimensions the Dimension Type field may be desired if the allowable dimension codes selected within the Enquiry List covers more than one type.

For example, below we can see the dimensions are grouped and the "Area" dimension can be distinguished within the Building Classifications.

Dimensions		
Dimension Type	Dimension Name	Dimension Value
Application	Colours	5
Application	Dimension 1	10.4321
Application	Dimension 2	20.1234
Application	Height	0
Application	Length	0
Application	Lights	48
Application	Width	0
Application	multi test for the one dimension	0
BP Development Data	Development 1	111.123
BP Development Data	Development 2	0
BP Subdivision Data	Sub Division 1	321.543
BP Subdivision Data	Sub Division 2	0
Building Classification - Building Classification 1 (fees)	Area	100
Building Classification - Building Classification 1 (fees)	Other	45
Building Classification - Building Classification 2 (fees)	Area	200
Building Classification - Building Classification 2 (fees)	Other	69.69

## NOTES REGARDING CSS STYLES AND INTERNAL CODE VALUES

The Column Tree tables (the collapsible cells for Major and Minor Categories) are now assigned ID's and a new CSS Class (ColumnTreeRow) has been applied to the parent Column Tree rows if column spanning is used to aid in tailoring the formatting.

It is recommended you do not expose the internal code fields provided.

I.e. Dimension Codes, Major Category Type and Minor Category Type.

These have been provided, however, for completeness and as an aid in testing environments. However, it should be noted if the Major Category Type or Minor Category Type is included, that it may be necessary to include some additional CSS style changes to tidy up alignment of fields.

EG. For this form layout.

Major Categories								
Major Category Type	Major Category Description							
<input type="checkbox"/> A1	Major Dev. Category 1 (with Minor/Ques/Conds)							
<input type="checkbox"/> A2	Major Dev. Category 2 (with Minor/Ques/Conds)							
Number	Question	Answer						
1	Hi this is a boolean question which happens to have a lot of text associated with it. Please feel free to ignore most of the waffle from this point forwards unless you really, really want to add being frustrated to your daily routine. Do you really want that?	Yes						
2	Select the most appropriate answers	It's the weekend, Today ends in Y						
3	Do you want to answer this question?	Undefined						
Minor Category Type	Minor Category Description							
<input type="checkbox"/> M2M1	M2 Minor 1							
	<table border="1"> <thead> <tr> <th>Name</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>M2 M1 Dimension 1</td> <td>35</td> </tr> <tr> <td>M2 M1 Dimension 4</td> <td>1200</td> </tr> </tbody> </table>	Name	Value	M2 M1 Dimension 1	35	M2 M1 Dimension 4	1200	
Name	Value							
M2 M1 Dimension 1	35							
M2 M1 Dimension 4	1200							
<input type="checkbox"/> M2M2	M2 Minor 2							
M2M3	M2 Minor 3							
<input type="checkbox"/> A3	Major Development Cat 3 (with Minor/Ques/Conds)							
A4	Major Development Cat 4 (with Minor/Ques)							

The following CSS additions were made:

```
/* Ensure Major Category Type column only consumes 20% of cell space. Works well with type width of 100 and description width of 400 in ePathway Layout */
```

```
table[id='Major_Category'] > tbody > tr > td:first-child {
  width: 20% !important;
}
```

```
/* Reduce general padding within Major Category column tree to provide more compact appearance */
```

```
table[id='Major_Category'] > tbody > tr td {
  padding: 4px !important;
}
```

```
/* Ensure Minor Category Type column only consumes 25% of cell space and the fields are indented for clarity of hierarchy. */
```

```
table[id='Minor_Category'] > tbody > tr > td:first-child {
  width: 25% !important;
  padding-left: 40px !important;
}
```

```
/* Hide extra column that appears when Column Tree has multiple fields. */
tr.ColumnTreeRow > td:last-child {
```

```
display: none;  
}
```

## ePathway General Enquiry - Rates

Incident: UX Client	Work Item: 58152 KB:	Fix: ERS:
------------------------	-------------------------	--------------

### 1. EPATHWAY RATES GENERAL ENQUIRY ENHANCEMENTS OVERVIEW

The ePathway Rates General Enquiry now allows multiple Enquiry Lists to be established with one list nominated as the default for a registered user. Note the existing Enquiry List will automatically be flagged as the default to ensure existing behaviour is unaffected. This enhancement allows ePathway to cater for multiple Enquiry Lists.

For example, councils may wish to defined multiple levels of user enquiry being:

1. Stakeholder/Ratepayer enquiry (equivalent to current enquiry access viewable for existing ratepayers).
2. Public Enquiry, where only limited details are exposed for public viewing.
3. Registered user enquiry, where the user is not a Ratepayer, but may be given access to specific information (E.g. For use in a council Kiosk environment).

As per all ePathway General Enquiries, the fields and layout of the data exposed is fully controlled by the Page Layout. defined against the enquiry list.

Additional search functions now enabled:

- Property Address Search
- Assessment Number Search
- Valuation (VG) Number Search

New fields allow additional data elements to be exposed:

- Land Value
- Capital Value
- Land Area
- Property Category
- Rate Category
- Activity (also used for District nomination for some NZ councils)
- Rating Period Comparison for Current/Previous period (where current can be Proposed/Projected model data)

### 2. EPATHWAY RATES GENERAL ENQUIRY CHANGES

It is now possible to define multiple rates Enquiry Lists. and assign them to specific registered users, the public user and to nominated customer types. This allows enquiries to be tailored to each user type to ensure only appropriate data is exposed for each enquiry. These new enquiries will be accessible via the General Enquiry menu as shown in this section.

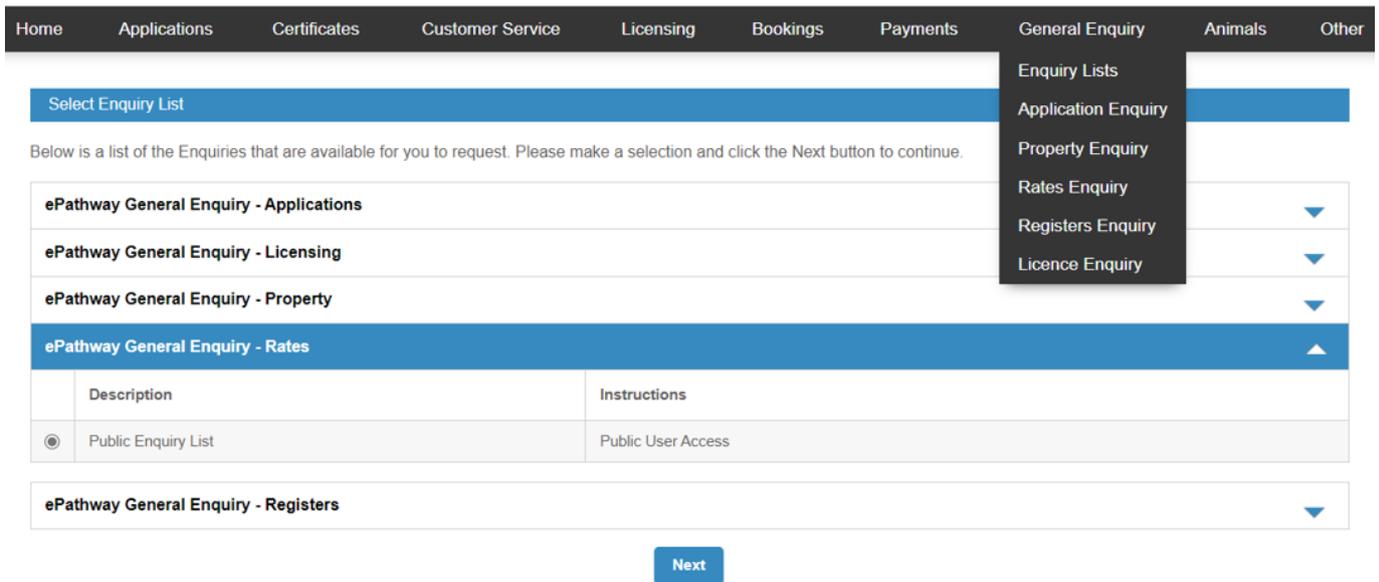


Figure 1: Public >> General Enquiry >> Enquiry Lists

A registered user will continue to see their associated assessments on the home page (depending upon councils home page configuration), but can now also access additional rates enquiries on their own or other assessments via the General Enquiry menu (see below Figure 2).

Note: Detailing directly to an assessment via a ratepayer role on the home page will display the details using the nominated default registered user Enquiry List.

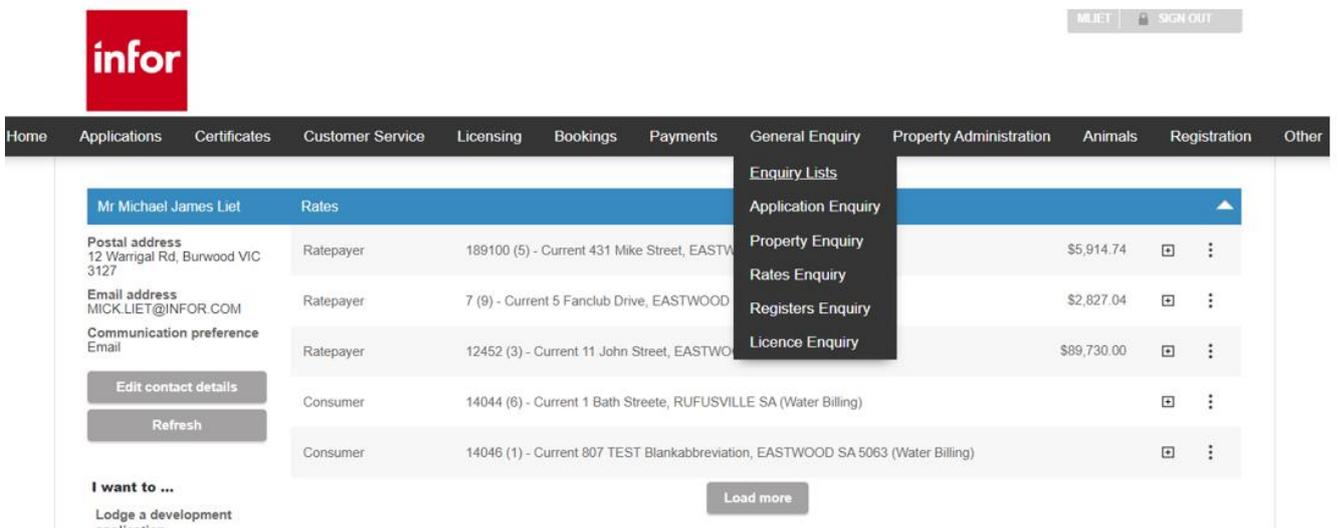


Figure 2: Registered user home page

As shown below, a registered user can be given access to multiple Enquiry Lists which would likely include those accessible to public users as well as the default registered user list. Councils can create as many options as they see fit.

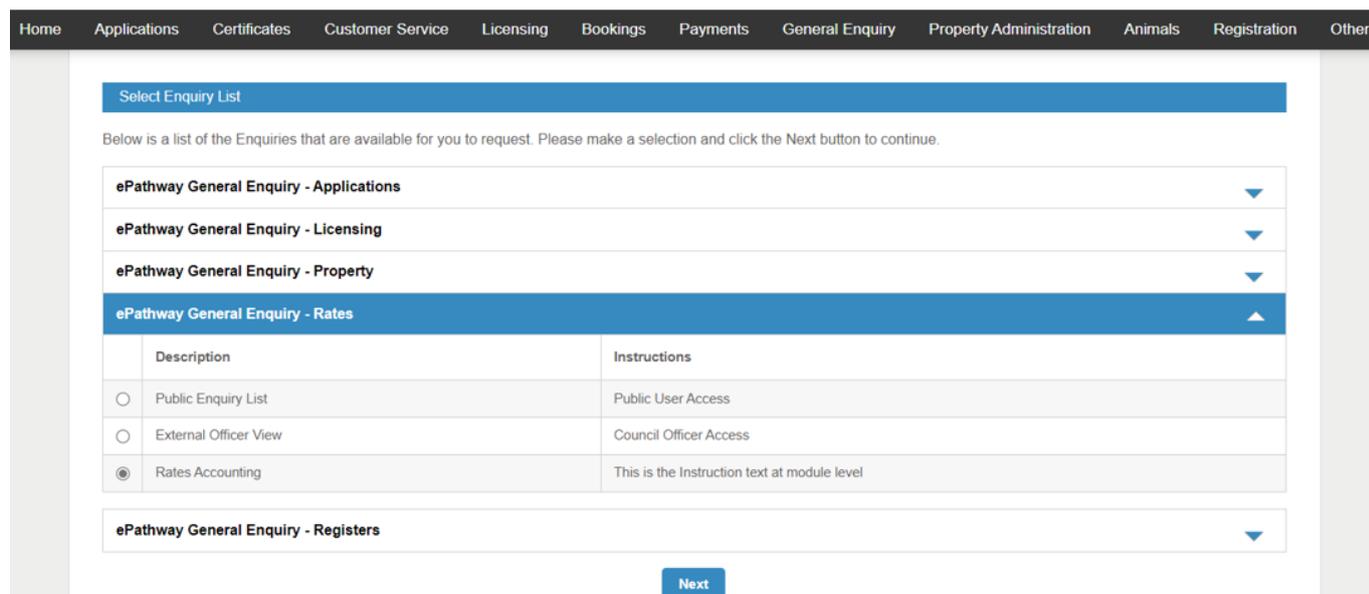


Figure 3: Registered User >> General Enquiry >> Enquiry Lists

Should the user choose the default list, then the enquiry will behave much as it did before. It will automatically search for assessments for which the current user has a ratepayer role (as shown below Figure 4).

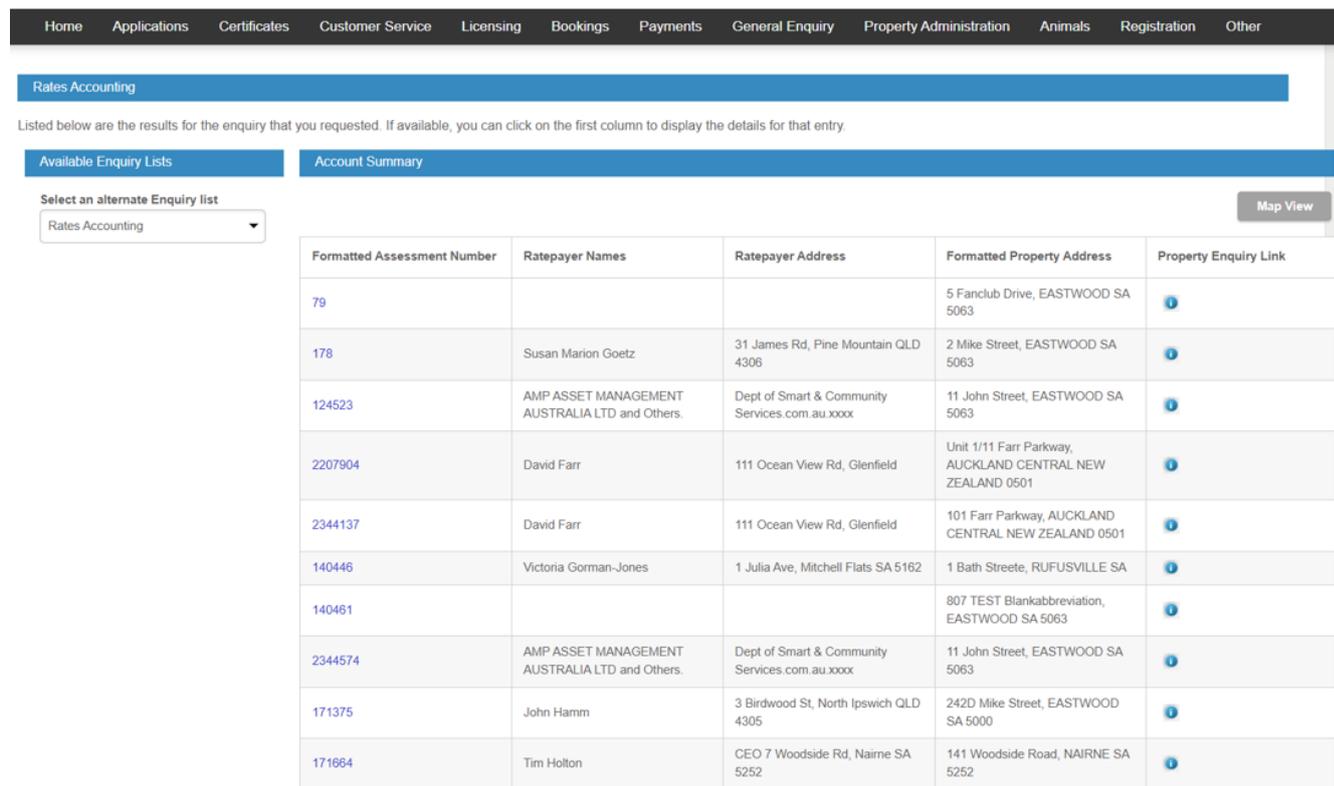


Figure 4: Registered User >> General Enquiry >> Enquiry Lists >> Rates Accounting (default list)

Alternatively, if another list is chosen other than the default, then the assigned search options are then available (see below Figure 5 - Figure 7 for search screens and see Figure 30 for an example of how to configure the available search options). Seen here, the public user can search by assessment number, valuer general number or address.

Figure 5: Rates enquiry search screen (by assessment number)

Figure 6: Rates enquiry search screen (by address)

Figure 7: Rates enquiry search screen (by valuer general number)

After the search is initiated, any matching assessments are displayed on the search results summary. Note in the examples below that the details shown on the public search summary screen (Figure 8) differ from the registered user screen (Figure 4). Council can configure the information to be exposed on each list. In the case of the public search, the ratepayers name and address are not exposed – instead, the property address details are shown.

Assessment Number	Valuation Number	Formatted Property Address
189100	7700189100	431 Mike Street, EASTWOOD SA 5000

Figure 8: Rates enquiry search results screen (public)

Similarly, when a public user selects an assessment for detailed viewing by selecting it from the summary screen, the resulting enquiry screen will only expose the details nominated for the public Enquiry List with no confidential/private details displayed (see below Figure 9).

Enquiry Detail View

Change the Rating Period  Previous Period Comparison

Account Details

Formatted Assessment Number	1891005
Valuation Number	7700189100
Rateable Value	600000
Formatted Property Address	431 Mike Street, EASTWOOD SA 5000
Arrears/Previous Period	\$0.00
Current Years Rates	\$8,154.38
Area (Ha)	0
Property Category Code	AIA
Property Category	Arable-Irrigated-excellent economic
Improvements	
Override Notice/Bill Description	
Activity/District	
Activity/District Code	
Land Value (LV)	\$748,000.00
Previous Land Value (LV)	\$0.00
Capital Value (CV)	\$880,000.00
Previous Capital Value (CV)	\$0.00

Rates Charges								
Rating Category Description	Rate Type Description	Calculation Method (Unit /Value /Fixed)	Fixed Amount/Rate/Unit Charge/Add. Charge	Valuation / Units	Units Description	Net Amount including adjustments	Percentage Applied	Calculated Amount
Mikes External Rates	Mikes Commercial Rates	Rateable Value by Rate in Dollar	0.002	66000	GC	\$132.00	10	\$132.00
<b>Total</b>						<b>\$132.00</b>		<b>\$132.00</b>
Mikes Council Rates	Mikes Sewerage + Additional \$	Rateable Value by Rate in Dollar	0.002	660000	GC	\$1,470.00	100	\$1,470.00
<b>Total</b>						<b>\$1,470.00</b>		<b>\$1,470.00</b>
General Rates	Mikes Tiered Residential Rates	Rateable Value by Rate in Dollar	0	660000	GC	\$1,320.00	100	\$1,320.00
General Rates	Mikes Residential	Rateable Value by Rate in Dollar	0.002	528000	GC	\$1,056.00	80	\$1,056.00
General Rates	Mikes Heritage property	Rateable Value by Rate in Dollar	0.0018	660000	GC	\$1,188.00	100	\$1,188.00
General Rates	Mikes Fixed 1 - General	Fixed Charge	1196.38	1	Fixed	\$1,196.38	100	\$1,196.38
<b>Total</b>						<b>\$4,760.38</b>		<b>\$4,760.38</b>
Garbage	Mikes 240LT Bin	Number of Units by Unit Charge	160	2	Units	\$320.00	100	\$320.00
Garbage	Mikes 240LT Bin	Number of Units by Unit Charge	130	0.6	Units	\$78.00	60	\$78.00
<b>Total</b>						<b>\$398.00</b>		<b>\$398.00</b>
<b>Total</b>						<b>\$6,760.38</b>		<b>\$6,760.38</b>

Figure 9: Rates enquiry details (public) with period comparison off

The previous period comparison switch is optionally available for each Enquiry List. If enabled, it will be present when displaying the most recent period if previous period values are also present on the assessment. The previous period comparison switch can be turned on to see rates charges details with the previous columns (see Figure 10).

Home Applications Certificates Customer Service Licensing Bookings Payments General Enquiry Animals Other

Enquiry Detail View

Change the Rating Period  Previous Period Comparison

Account Details

Formatted Assessment Number	1891005
Valuation Number	7700189100
Rateable Value	600000
Formatted Property Address	431 Mike Street, EASTWOOD SA 5000
Arrears/Previous Period	\$0.00
Current Years Rates	\$6,154.38
Area (Ha)	0
Property Category Code	A/A
Property Category	Arable-Irrigated-excellent economic
Improvements	
Override Notice/Bill Description	
Activity/District	
Activity/District Code	
Land Value (LV)	\$748,000.00
Previous Land Value (LV)	\$0.00
Capital Value (CV)	\$860,000.00
Previous Capital Value (CV)	\$0.00

Previous Rates Charges															
Rating Category Description	Rate Type Description	Calculation Method (Unit /Value /Fixed)	Valuation / Units	Previous Units	Units Description	Fixed Amount/Rate/Unit Charge/Add. Charge	Previous Rate	Net Amount including adjustments	Previous Amount	Change Amount	Percentage Applied	Calculated Amount	Previous Calculated Amount	Change Calculated Amount	
Mikes External Rates	Mikes Commercial Rates	Rateable Value by Rate in Dollar	66000	60000	GC	0.002	0.002	\$132.00	\$120.00	\$12.00	10	\$132.00	\$120.00	\$12.00	
<b>Total</b>									\$132.00	\$120.00	\$12.00	\$132.00	\$120.00	\$12.00	
Mikes Council Rates	Mikes Sewerage + Additional \$	Rateable Value by Rate in Dollar	660000	600000	GC	0.002	150	\$1,470.00	\$1,350.00	\$120.00	100	\$1,470.00	\$1,350.00	\$120.00	
<b>Total</b>									\$1,470.00	\$1,350.00	\$120.00	\$1,470.00	\$1,350.00	\$120.00	
General Rates	Mikes Tiered Residential Rates	Rateable Value by Rate in Dollar	660000	600000	GC	0	0	\$1,320.00	\$1,050.00	\$270.00	100	\$1,320.00	\$1,050.00	\$270.00	
General Rates	Mikes Residential	Rateable Value by Rate in Dollar	528000	480000	GC	0.002	0.002	\$1,056.00	\$960.00	\$96.00	80	\$1,056.00	\$960.00	\$96.00	
General Rates	Mikes Heritage property	Rateable Value by Rate in Dollar	660000	600000	GC	0.0018	0.0018	\$1,188.00	\$1,080.00	\$108.00	100	\$1,188.00	\$1,080.00	\$108.00	
General Rates	Mikes Fixed 1 - General	Fixed Charge	1	0	Fixed	1196.38	1196.38	\$1,196.38	\$1,196.38	\$0.00	100	\$1,196.38	\$1,196.38	\$0.00	
<b>Total</b>									\$4,760.38	\$4,286.38	\$474.00	\$4,760.38	\$4,286.38	\$474.00	
Garbage	Mikes 240LT Bin	Number of Units by Unit Charge	2	2	Units	160	160	\$320.00	\$320.00	\$0.00	100	\$320.00	\$320.00	\$0.00	
Garbage	Mikes 240LT Bin	Number of Units by Unit Charge	0.6	0.6	Units	130	130	\$78.00	\$78.00	\$0.00	60	\$78.00	\$78.00	\$0.00	
<b>Total</b>									\$398.00	\$398.00	\$0.00	\$398.00	\$398.00	\$0.00	
<b>Rates Total</b>									\$6,760.38	\$6,154.38	\$606.00	\$6,760.38	\$6,154.38	\$606.00	

Figure 10: Rates enquiry details (public) with period comparison on

### 3. CONFIGURATION CHANGES

#### 3.1. GENERAL ENQUIRY PARAMETERS WITHIN UX

##### 3.1.1. RATES ENQUIRY PARAMETERS

The Rates Enquiry Parameters menu now has 3 options. Previously there was only one enquiry list available which meant there was no need to separate general rates enquiry parameters from those specific to the list. A Rates Enquiry Parameters option for settings common to all lists has been introduced as the first open, and the Rates Enquiry List Parameters screen now caters for the creation of new lists and applying settings specific to each list.

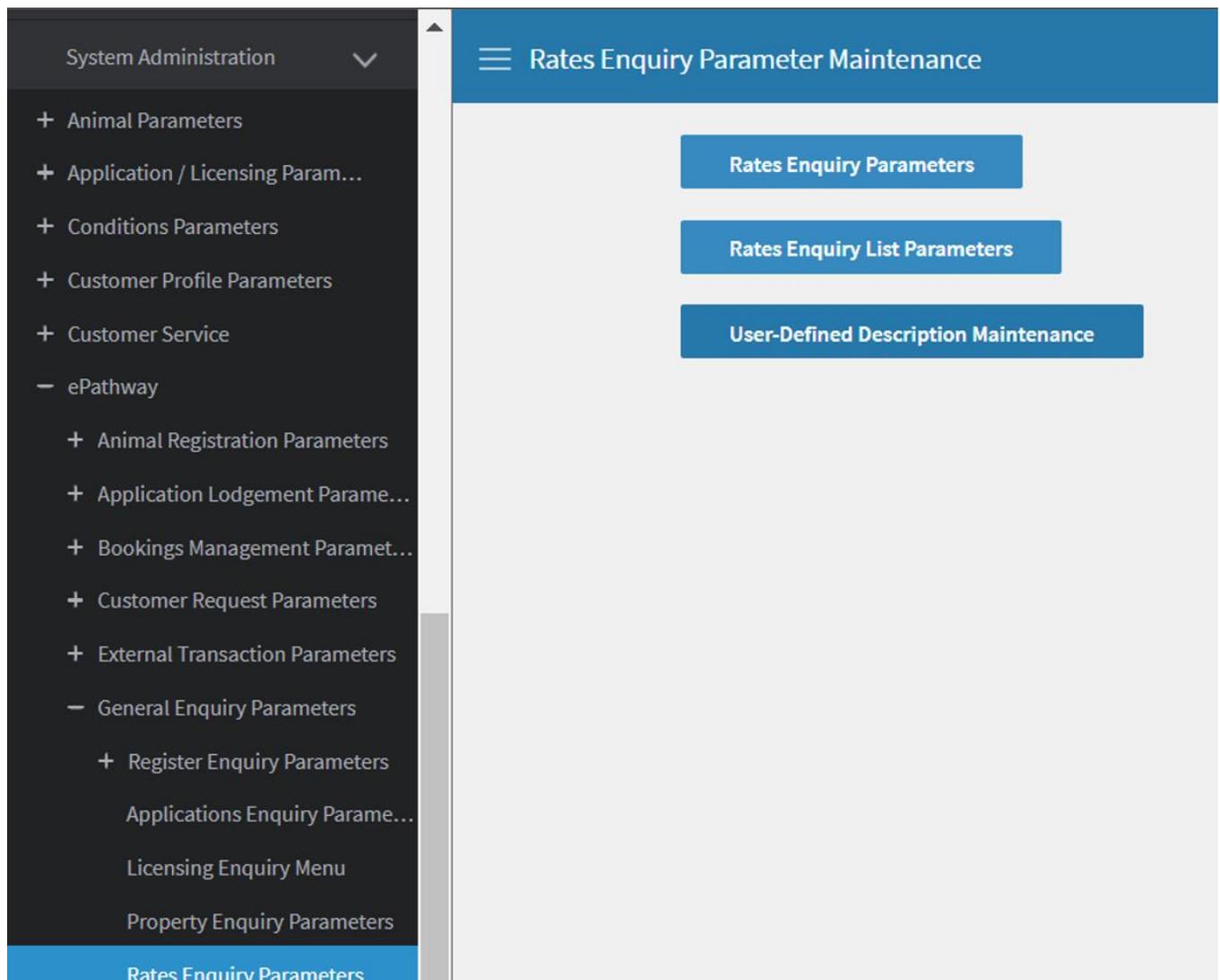


Figure 11: System Administration >> ePathway >> General Enquiry Parameters >> Rates Enquiry Parameters (EGEG9103)

The Rates Enquiry Parameters screen shown in Figure 12 allows definition of parameters common to all rates enquiries. This screen enables selection of the Rates Valuation Types to be used for the new Capital Value and Land Value fields on the rates enquiry as well as the units of measure applicable to the Land Area field.

The Rates Enquiry Parameters screen also allows an optional Model Code to be nominated with an associated description (see Rates Modelling section later in this document for more details). Note that the code field can be left blank if there is only ever one model loaded as the system will use the first model code found in that instance. The description, if specified will override any description for the model provided in the model data.

← Rates Enquiry Parameters Save Remove Activity Type

LRA Details

LRA - Rates Accounting

Controls

Capital Value Rates Valuation Type

CV - CV - Wellington CPS Interface

Land Value Rates Valuation Type

LV - LV - Wellington CPS Interface

Land Area Display Units

sqm - Meters squared

Model Code

PROPOSED

Model Description

2023/2024

Figure 12: System Administration >> ePathway >> General Enquiry Parameters >> Rates Enquiry Parameters (EGEG9103) >> Rates Enquiry Parameters (EGEG9030)

The possible Activity Types to be displayed in the new Activity and Activity Code fields can be nominated via the Activity Type action on the above screen. For NZ councils such as Waikato, the most recent of these activity types on an assessment is used to identify the District for an assessment. For Waikato, the assigned Activity Types would be those of the possible Districts (see Figure 13). When creating the layout in ePathway the Activity can then be added and its label changed appropriately (E.g. "District") to show an assessments district.

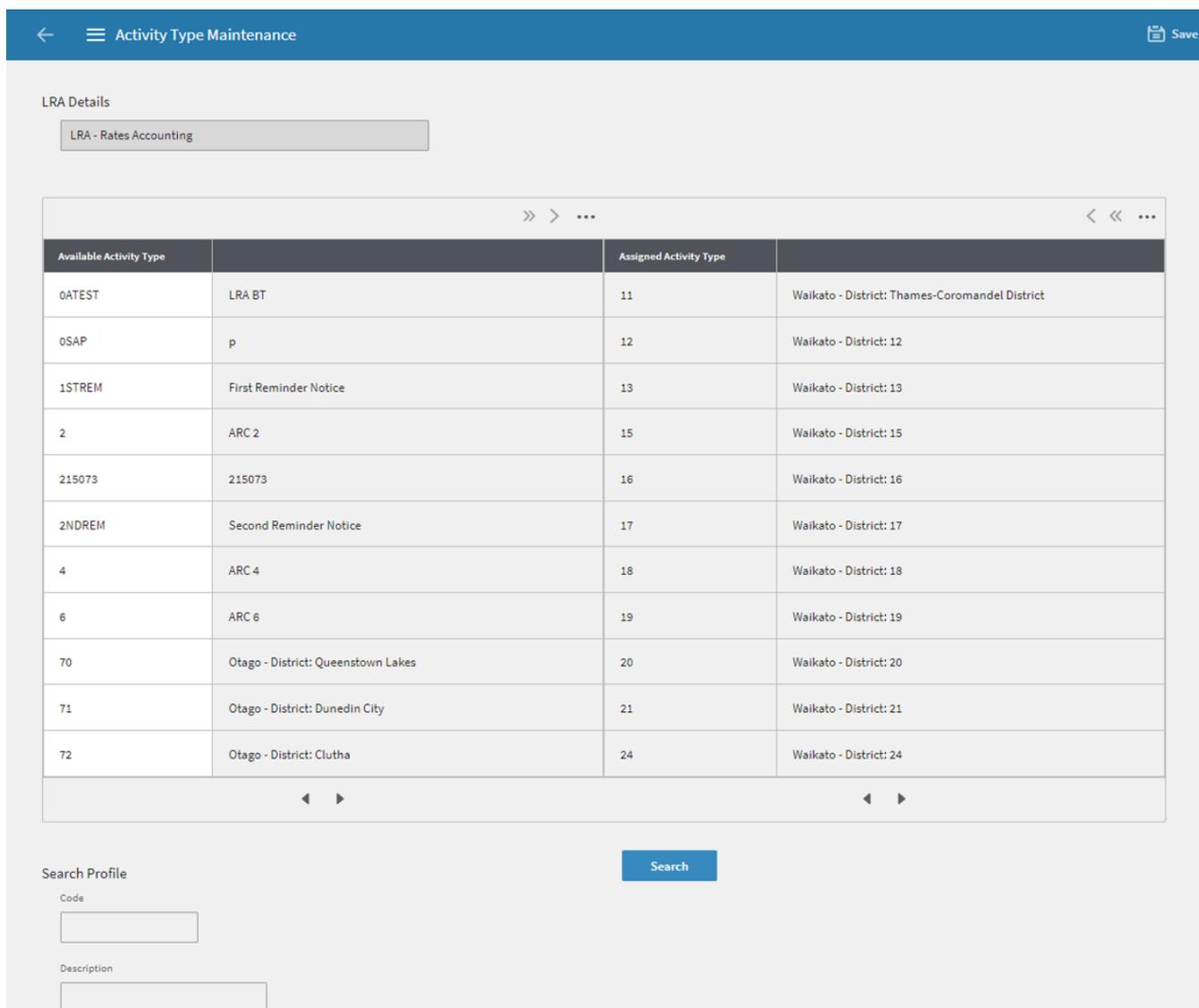


Figure 13: System Administration >> ePathway >> General Enquiry Parameters >> Rates Enquiry Parameters (EGEG9103) >> Rates Enquiry Parameters (EGEG9030) >> Activity Type Maintenance (ESYG9050)

When Rates Enquiry List Parameters is chosen from the Rates Enquiry Parameters menu screen, the system presents the search screen (see Figure 14) to allow searching or addition of Enquiry Lists. E.g. Pressing the Search button (without entering any criteria) will show all existing lists, whilst pressing the New button will allow the creation of a new list.

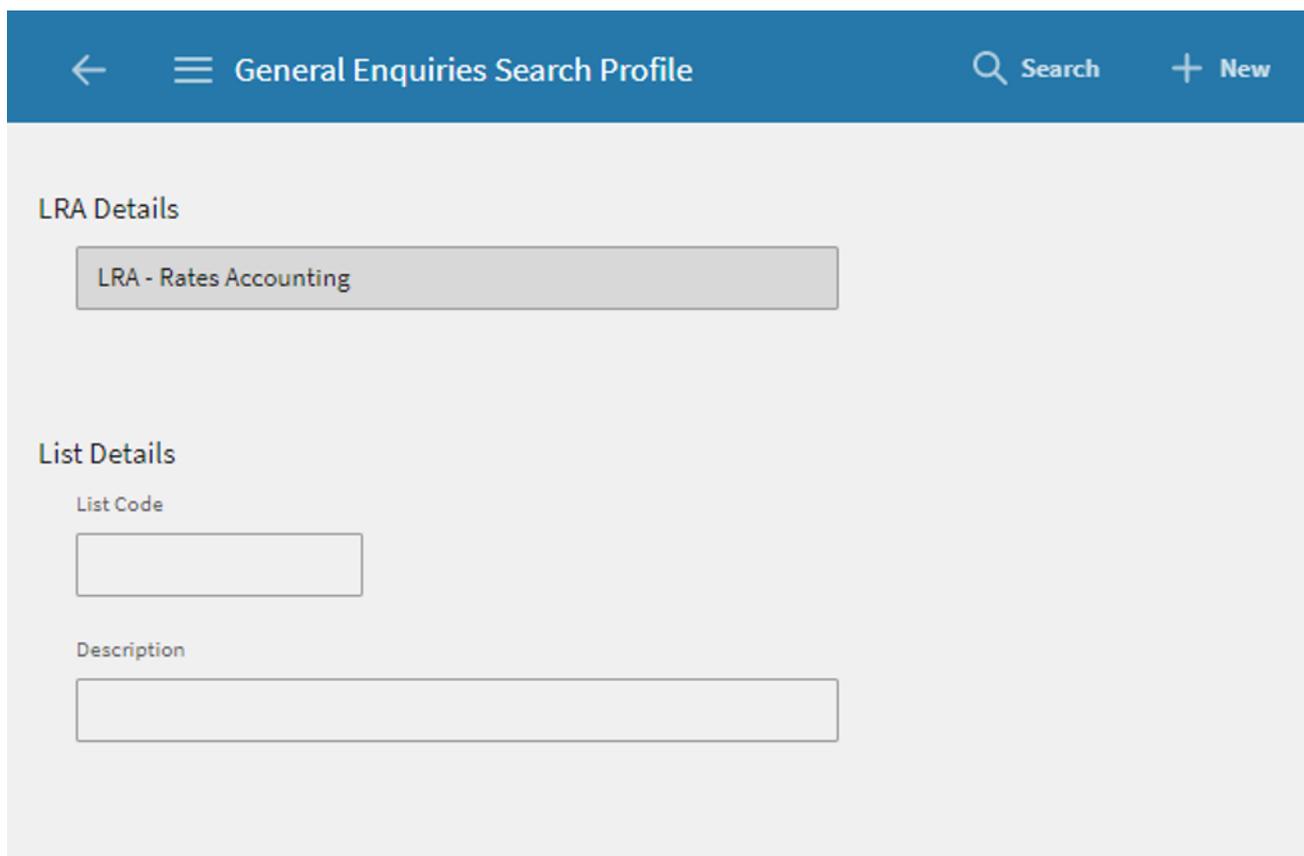


Figure 14: System Administration >> ePathway >> General Enquiry Parameters >> Rates Enquiry Parameters (EGEG9103) >> Rates Enquiry List Search (EGEF9020)

The General Enquiries List Selection screen (see Figure 15) allows selection of the list to Modify, Addition of a new list, and for the nomination of which list is to be used for Registered User (i.e. When a ratepayer uses the enquiry to display their rates assessments or when detailing out on one of their assessments from the My Home screen).

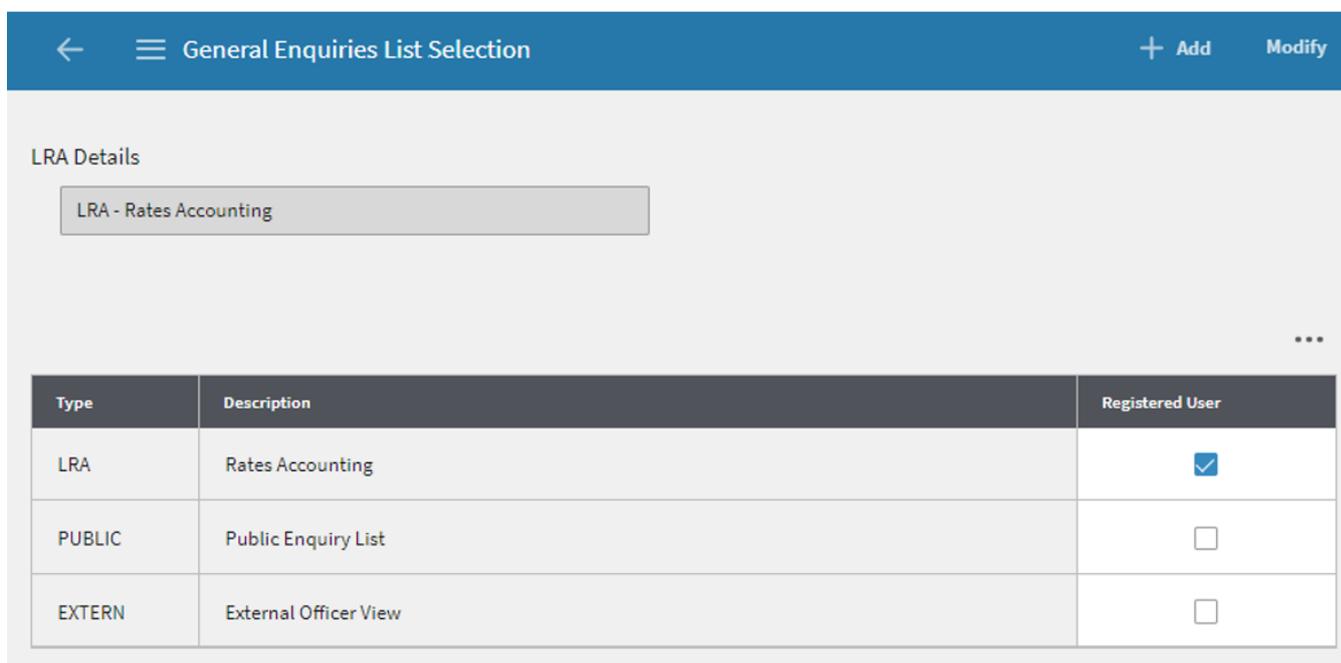


Figure 15: System Administration >> ePathway >> General Enquiry Parameters >> Rates Enquiry Parameters (EGEG9103) >> Rates Enquiry List Selection

The Rates Enquiry List Parameters maintenance screen presents slightly different depending upon the Registered User checkbox. shown on the previous screen. Figure 16 shows the additional actions present on the Registered User list.

The Attachment Types to be exposed can be nominated for ratepayers. The Direct Debit and Arrangement to Pay parameters can be maintained.

The screenshot displays the 'Rates Enquiry List Parameters – Registered User' maintenance screen. It features a blue header with navigation icons and a 'Save' button. The main content area is divided into several sections:

- LRA Details:** A text input field containing 'LRA - Rates Accounting'.
- List Details:**
  - List Code:** A text input field with 'LRA' and a checked 'Active' checkbox.
  - Description:** A text input field with 'Rates Accounting' and a checked 'Registered User' checkbox.
- Controls:** Two checkboxes: 'Display Previous Rating Periods' (unchecked) and 'Display Projected Rates' (checked).
- Options:** Three buttons: 'Status', 'Direct Debits', and 'Arrangements To Pay'.

A dropdown menu is open on the right side, listing various attachment and merge types: Attachment Types, Debtors Attachment Types, Debtors Merge Types, Merge Types, Name Roles, Trade Waste Attachment Types, Trade Waste Merge Types, and Valuation Types.

Figure 16: System Administration >> ePathway >> General Enquiry Parameters >> Rates Enquiry Parameters (EGEG9103) >> Rates Enquiry List Parameters – Registered User (EGEG9022)

Figure 17 shows the more limited actions present for other (non-Register User) lists due to those actions/options not being not relevant for non-ratepayers.

General Enquiry Rates Parameter Maintenance

Save Remove

Name Roles  
Valuation Types

LRA Details

LRA - Rates Accounting

List Details

List Code

PUBLIC  Active

Description

Public Enquiry List  Registered User

Controls

Display Previous Rating Periods

Display Projected Rates

Options

Status

Figure 17: System Administration >> ePathway >> General Enquiry Parameters >> Rates Enquiry Parameters (EGEG9103) >> Rates Enquiry List Parameters – Non-Registered User (EGEG9022)

The User Defined Description Maintenance screen (see Figure 18) has been enhanced to allow specific ePathway descriptions for each of the Calculation Methods and Rate Categories should that be required. This ensures that the internal Pathway description for these items can be kept separate to the description seen online.

The screenshot shows a web application interface titled 'User-Defined Description Maintenance'. At the top right, there are 'Save' and 'Remove' buttons. The main content is a table with the following columns: Entity Name, Calculation Method, Pathway Code, Pathway Description, and ePathway Description. The table is divided into two sections: 'LRACALC' (Calculation Method) and 'LRACATG' (Rate Category).

Entity Name	Calculation Method	Pathway Code	Pathway Description	ePathway Description
LRACALC	Calculation Method	A	(Rateable Value × Rate in Dollar) + Additional Cha	Rateable Value by Rate in Dollar
		C	Water Consumption	Water Consumption
		F	Fixed Charge	
		G	Fixed Charge based on Previous Consumption	
		R	Rateable Value × Rate in Dollar	Rateable Value by Rate in Dollar
		U	Number of Units × Unit Charge	Number of Units by Unit Charge
		W	Trade Waste Usage Discharge	
LRACATG	Rate Category	1	1	
		AGC_CNCL1	Sep Notice by Cat = Council/External (COUNCIL)	
		AGC_CNCL2	Sep Notice by Cat = Council/External (COUNCIL)	
		AGC_CNCL3	Sep Notice by Cat = Council/External (COUNCIL)	
		AGC_EXT1	Sep Notice by Cat = Council/External (EXTERNAL)	
		AGC_EXT2	Sep Notice by Cat = Council/External (EXTERNAL)	

Figure 18: System Administration >> ePathway >> General Enquiry Parameters >> Rates Enquiry Parameters >> User Defined Description Maintenance

Once all the above rates enquiry parameters have been established the changes need to be exported to ePathway via the Web Server Export (see Figure 19).

The screenshot shows a web application interface for 'Export Control'. At the top, there is a blue header with a menu icon, the text 'Export Control', and buttons for 'Submit' and 'Clear'. Below the header, the breadcrumb 'Homepage / Export Control' is visible. The main content area has a 'Search Profile' section. Below that, it says 'Export to Web Server (38 results)'. A table lists various export options, each with a checkbox. The 'General Enquiry - Rates' option is checked and highlighted in light blue. Other options include 'Booking Area and Class Export', 'General Enquiry - Applications', 'General Enquiry - Licensing', 'General Enquiry - Property', 'General Enquiry - Registers', 'Response Type Export', 'Response Field Export', 'User Function Type Export', and 'User Field Export'.

<input type="checkbox"/>	[R] <input type="text"/>
<input type="checkbox"/>	Booking Area and Class Export
<input type="checkbox"/>	General Enquiry - Applications
<input type="checkbox"/>	General Enquiry - Licensing
<input type="checkbox"/>	General Enquiry - Property
<input checked="" type="checkbox"/>	General Enquiry - Rates
<input type="checkbox"/>	General Enquiry - Registers
<input type="checkbox"/>	Response Type Export
<input type="checkbox"/>	Response Field Export
<input type="checkbox"/>	User Function Type Export
<input type="checkbox"/>	User Field Export

Figure 19: System Administration >> ePathway >> System Processing >> Web Server Export

### 3.1.2. WEB USER AND CUSTOMER TYPES ACCESS

Rates General Enquiries now allow multiple enquiry lists. To use them, it is necessary to assign which users and customer types have access. All existing registered users will retain access to the default registered user enquiry list, but it is necessary to assign any additional lists, such as the public list, both to the registered users and the public users.

For councils that utilize Customer Types to group user configuration, adding access to an additional enquiry list is straight forward. It should be noted that councils with a large user count may result in many user exports. As such the export is best conducted at a less disruptive time of day.

For Customer Type changes, access the Customer Type Maintenance form. Identify and select the Customer Type to update and then invoke the Customer Types Functions action.

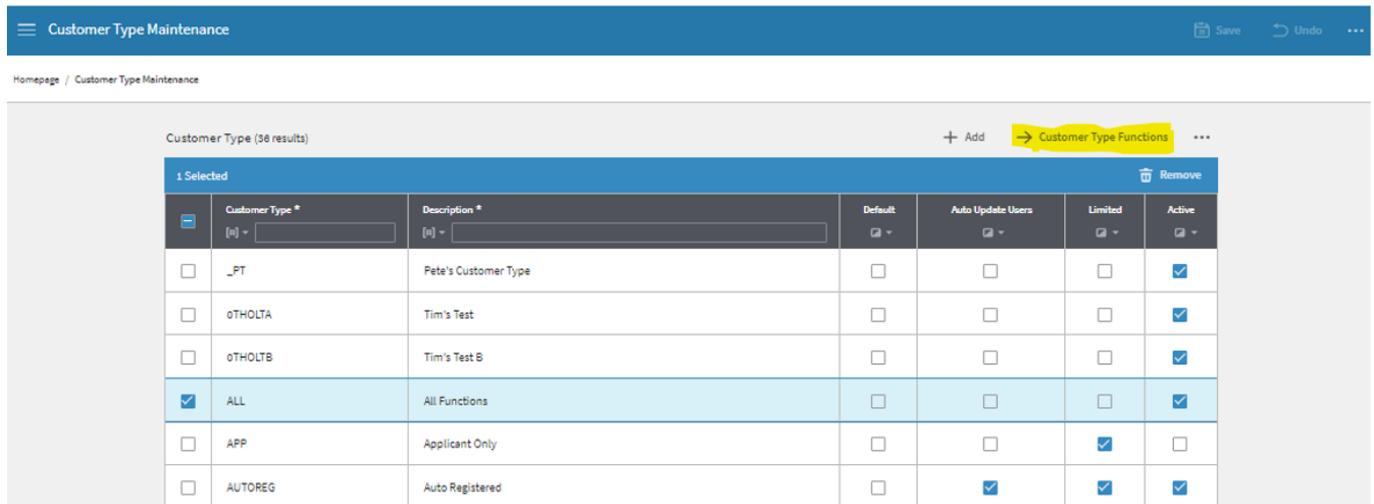


Figure 20: System Administration >> Customer Profile Parameters >> Customer Type Maintenance

On the Customer Type Functions form, select the allocated ePathway General Enquiry – Rates function and invoke the Types action.

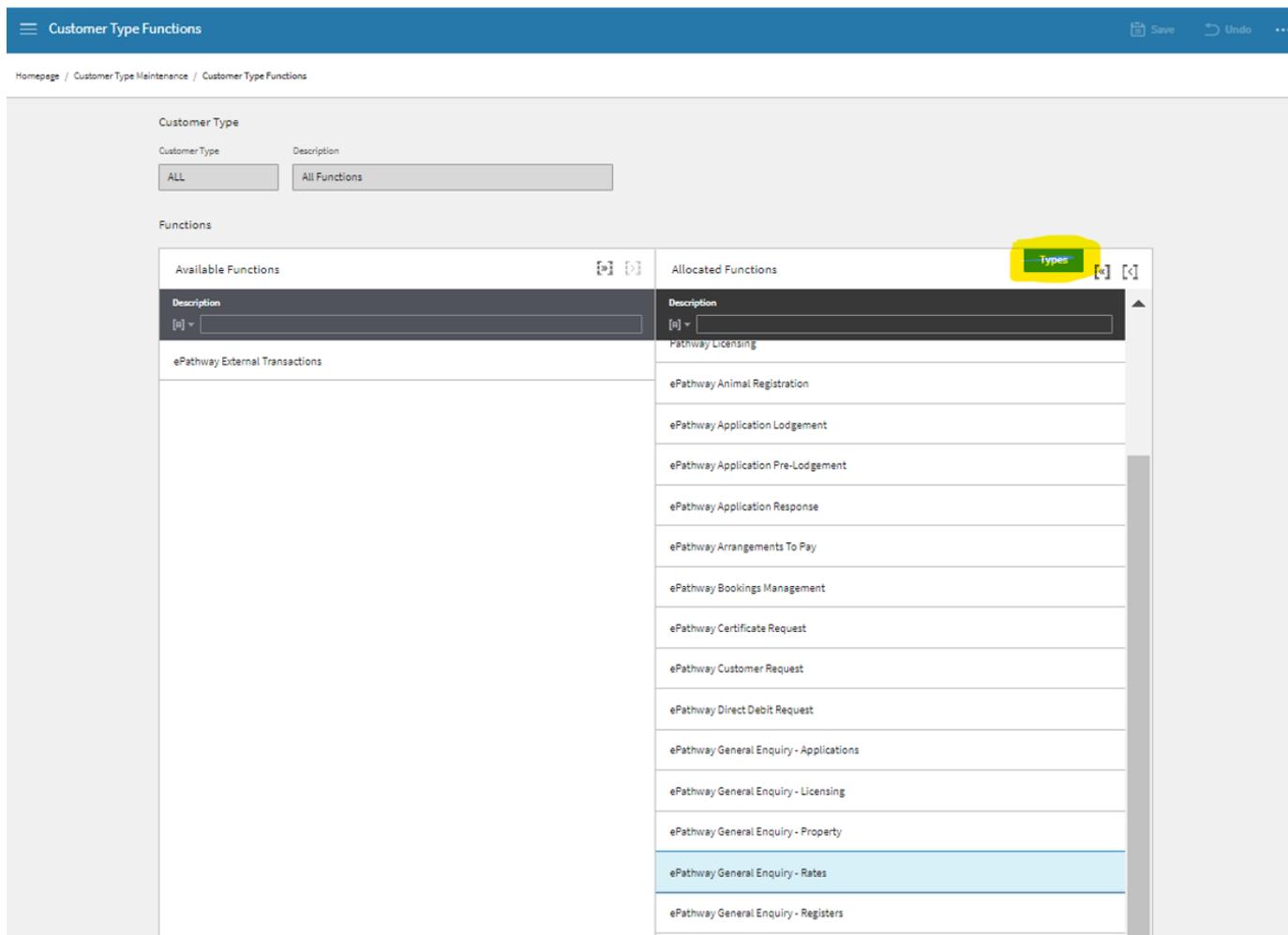


Figure 21: System Administration >> Customer Profile Parameters >> Customer Type Maintenance >> [Select] >> Customer Type Functions

The List Type Customer Function Type Maintenance form allows selection of the Enquiry Lists that ePathway users assigned to this Customer Type will be able to access. The default registered user list (LRA) may already be selected, but additional lists such as Public can now be added.

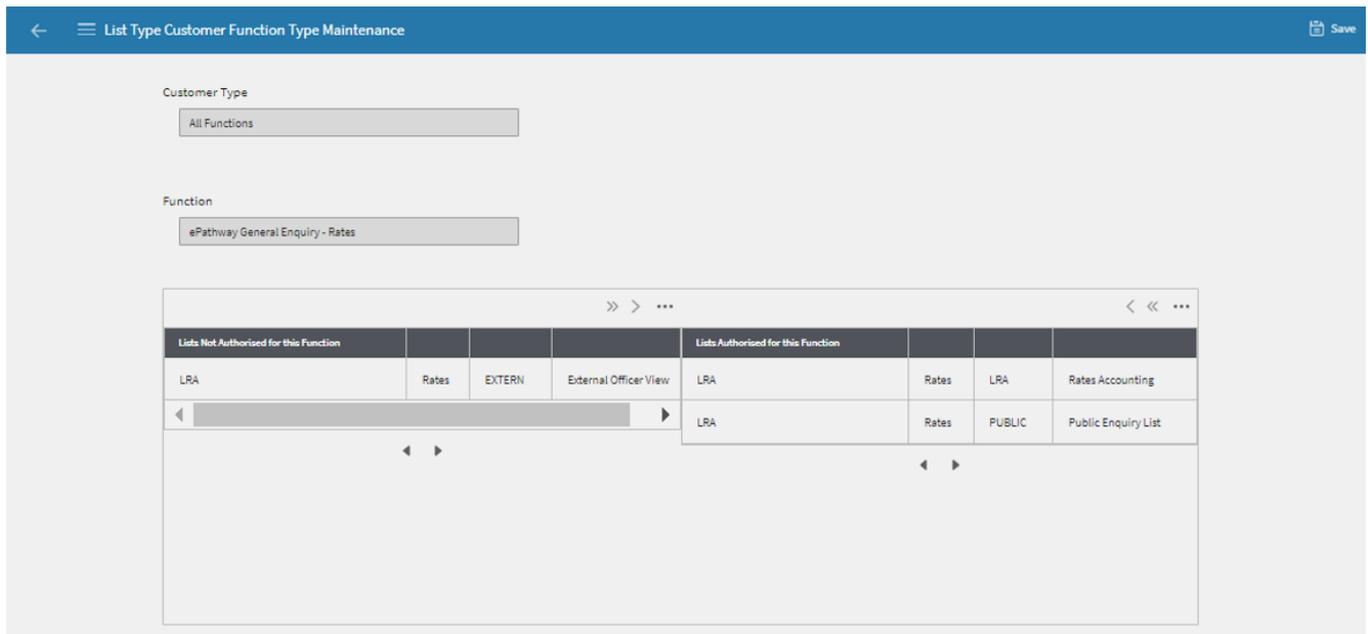


Figure 22: System Administration >> Customer Profile Parameters >> Customer Type Maintenance >> [Select] >> Customer Type Functions >> [Select ePathway General Enquiry – Rates] >> Types

Similarly, the ePathway General Enquiry – Rates function and the appropriate list can now be added to the Public web user either via the method used above if adding to the Customer Type, or else following the screens below to add directly to the web user. using the Web User Maintenance screen.

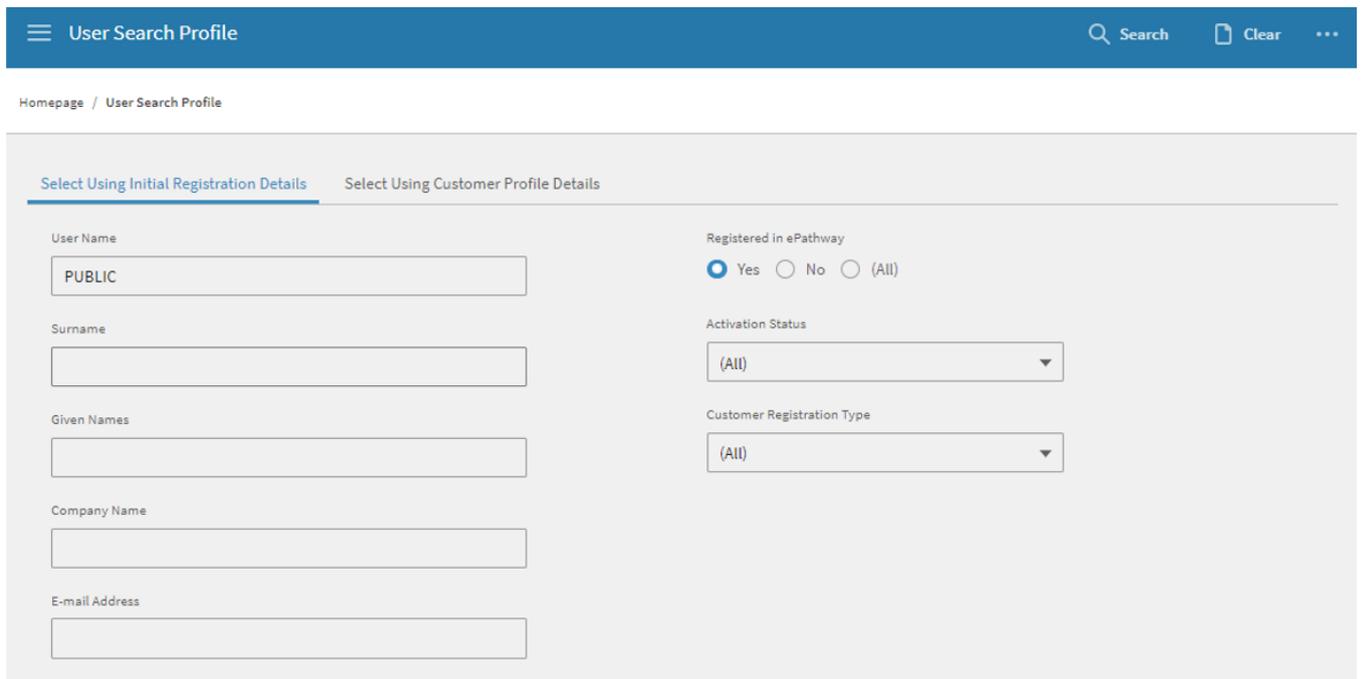


Figure 23: System Administration >> ePathway >> System Parameters >> Web User Maintenance

From the Web User Maintenance form the Customer Profile action can be invoked.

← User Maintenance
Save Undo

Customer Profile  
 Audit  
 Field Properties

### ePathway Registration Details

<p>Online Customer</p> <input style="width: 90%;" type="text" value="Joe Public"/> →	<p>Activation Code</p> <input style="width: 20%;" type="text" value="-"/> <input style="width: 40%;" type="text" value="1011"/> <input style="width: 20%;" type="text" value="+"/>
<p>Address</p> <input style="width: 95%;" type="text" value="1B 52nd Street Tce, Aberfoyle Hills SA 5159"/>	<p>Customer Registration Type</p> <input style="width: 95%;" type="text" value="New User Registration"/>
<p>Company Representative</p> <input style="width: 90%;" type="text"/> →	<p>Activation Status</p> <input style="width: 90%;" type="text" value="Complete"/> ▼
<p>Company Address</p> <input style="width: 95%;" type="text"/>	<p>Activation Expiry Date</p> <input style="width: 40%;" type="text" value="d/MM/yyyy"/> <input style="width: 20%;" type="text" value="d/MM/yyyy"/>
<p><input type="checkbox"/> Active</p>	<p>Activation Attempts</p> <input style="width: 20%;" type="text" value="-"/> <input style="width: 40%;" type="text"/> <input style="width: 20%;" type="text" value="+"/>
<p>Request Received</p> <input style="width: 90%;" type="text" value="7/06/2005 10:38:54 AM"/>	
<p>Registered in ePathway</p> <input checked="" type="radio"/> Yes <input type="radio"/> No	

Figure 24: System Administration >> ePathway >> System Parameters >> Web User Maintenance [Search Public]

The ePathway General Enquiry – Rates function can be selected, and the Types action invoked to allow the enquiry lists to be assigned.

← Customer Profile Maintenance Save Undo Delete

User Maintenance / Customer Profile Maintenance

Customer Functions (24 results) Types ...

1 Selected

Description	Active
<input type="checkbox"/> Pathway Applications	<input checked="" type="checkbox"/>
<input type="checkbox"/> Pathway Bookings Management	<input checked="" type="checkbox"/>
<input type="checkbox"/> Pathway Certificate Request	<input checked="" type="checkbox"/>
<input type="checkbox"/> Pathway Licence Renewals	<input checked="" type="checkbox"/>
<input type="checkbox"/> Pathway Licensing	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway Animal Registration	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway Application Lodgement	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway Application Pre-Lodgement	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway Application Response	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway Arrangements To Pay	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway Bookings Management	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway Certificate Request	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway Customer Request	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway Direct Debit Request	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway General Enquiry - Applications	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway General Enquiry - Licensing	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway General Enquiry - Property	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> ePathway General Enquiry - Rates	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway General Enquiry - Registers	<input checked="" type="checkbox"/>
<input type="checkbox"/> ePathway Licence Entry	<input checked="" type="checkbox"/>

Figure 25: System Administration >> ePathway >> System Parameters >> Web User Maintenance [Search Public] >> Customer Profile >> [Select ePathway General Enquiry - Rates]

Allocate the appropriate enquiry lists for the Public user. The list nominated as Registered User should not be assigned (Figure 26) as we do not want to expose confidential/private details to anyone but the actual ratepayer.

ePathway Registration Details

User Name: PUBLIC

Personal Name: Joe Public

Registered in ePathway

Active

Lists that this User is not able to view		Lists that this User is able to view	
List Code	[x]	List Code	[x]
EXTERN - External Officer View		PUBLIC - Public Enquiry List	
LRA - Rates Accounting			

Figure 26: System Administration >> ePathway >> System Parameters >> Web User Maintenance >> [Search Public] >> Customer Profile >> [Select ePathway General Enquiry - Rates] >> Types

Note that this same method for allocating Enquiry Lists to the Public user may also be applied to other ePathway users as required. For example, a council officer (or group of) working at a Kiosk may be granted permissions to view the 'External Officer View'.

## 3.2. GENERAL ENQUIRY PARAMETERS WITHIN EPATHWAY

### 3.2.1. ADDITIONAL RATES ENQUIRY FIELDS

After running the Web Server Export for *General Enquiry – Rates* as mentioned earlier in this document, some additional fields and columns will be available to configure on the ePathway General Enquiry Rates screens. Below is a summary of the new fields.

Table 1: Additional Rates Enquiry fields

FIELD / COLUMN	DEFAULT LABEL / DESCRIPTION	TYPE (XMLTYPE)	PARENT COLUMN(S)
Rating_Category_Descr	Rating Category	Field (TEXT 50)	Rates_Charges / Previous_Rates_Charges
Valuation_Units_Descr	Unit code	Field (TEXT 10)	Rates_Charges / Previous_Rates_Charges
Previous_Amount	Previous Amount	Field (CURRENCY)	Previous_Rates_Charges
Previous_Rate	Previous Rate	Field (DECIMAL4)	Previous_Rates_Charges
Previous_Units	Previous Units	Field (DECIMAL4)	Previous_Rates_Charges
Change_Amount	Generated_Amount - Previous_Amount	Field (CURRENCY)	Previous_Rates_Charges

<b>FIELD / COLUMN</b>	<b>DEFAULT LABEL / DESCRIPTION</b>	<b>TYPE (XMLTYPE)</b>	<b>PARENT COLUMN(S)</b>
Change_Calculated_Amount	Calculated_Amount - Previous_Calculated_Amount	Field (CURRENCY)	Previous_Rates_Charges
Percentage_Applied	Percentage Applied to Valuation_Units	Field (DECIMAL4)	Rates_Charges / Previous_Rates_Charges
Calculated_Amount	Valuation_Units x Rate_Charge	Field (CURRENCY)	Rates_Charges / Previous_Rates_Charges
Previous_Calculated_Amount	Previous_Units x Previous_Rate	Field (CURRENCY)	Previous_Rates_Charges
Previous_Rates_Charges	Same as Rates_Charges only with Previous period fields. This is displayed when Previous Period Comparison switch is active.	Column (COLUMN)	
Activity	Activity associated with the Pathway Rates Assessment. For some NZ Councils this will nominate the District.	Field (TEXT 50)	
Activity_Code	Activity Code associated with the Pathway Rates Assessment. For some NZ Councils this will nominate the District.	Field (TEXT 10)	
Land_Value	Land Value (LV)	Field (CURRENCY)	
Capital_Value	Capital Value (CV)	Field (CURRENCY)	
Previous_Land_Value	Previous Land Value (LV)	Field (CURRENCY)	
Previous_Capital_Value	Previous Capital Value (CV)	Field (CURRENCY)	
Land_Area	Area (Ha)	Field (DECIMAL4)	
Property_Category	Property Category	Field (TEXT 50)	
Property_Category_Code	Property Category Code	Field (TEXT 10)	
Improvements	Improvements Sourced from Valuation Description.	Field (TEXT 50)	
Override_Notice_Bill_Descr	Override Notice / Bill Description NOTE: Waikato data conversion loads this with Legal Description.	Field (TEXT 2000)	

For each new Enquiry List created for Rates (via Figure 14), the appropriate layout can then be defined (via Figure 27: ADMIN >> Layout >> Page Layout >> ePathway General Enquiry - Rates).

**NOTE:** The Calculated\_Amount and Previous\_Calculated\_Amount field value is an ad hoc calculated amount based upon the rate types for the current period. It will not reflect values at the time of generation if rate type parameters for the current period are changed as it will reflect the new values.

**NOTE:** The calculations assume the period is for a full year and does not include supplementary rates.

If you are unable to work with these limitations, you can continue to use the existing Generated\_Amount field with the new Previous\_Amount field as these use values based upon the generated transactions for the period.

Enquiry Lists								
This page shows all the available Enquiry Lists for your selected Pathway Module.								
Module:LRA Pathway Module								
Seq.	Code	Description	Instruction	Image				
1	PUBLIC	Public Enquiry List	Public User Access	Url <input type="text"/> Text <input type="text"/>	Metadata Text	Summary	Detail	
5	EXTERN	External Officer View	Council Officer Access	Url <input type="text"/> Text <input type="text"/>	Metadata Text	Summary	Detail	
10	LRA	Rates Accounting	This is the Instruction text at module level	Url <input type="text" value="applications.gif"/> Text <input type="text" value="This is the Image Text at module level"/>	Metadata Text	Summary	Detail	

Figure 27: ADMIN >> Layout >> Page Layout >> ePathway General Enquiry - Rates

Note that any of the new fields/columns (see Table 1: Additional Rates Enquiry fields) can now be added to the layout in addition to those previously available.

Enquiry List Page Groups											
Seq.	Title	Image	Instructions	Type	Label Width	Label Alignment	Omit Null	Child Group		Delete	
1	Rates Details	Url Text applications.gif Rates Details Image	Rates Details Instruction Text	Field	150	Left	<input type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>	
2	Direct Debits	Url Text applications.gif Direct Debits Image 1		Column			<input type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>	
3	Rates Charges	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>	
4	Previous Rates Char	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>	
5	Rates Name Roles	Url Text		Column			<input type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>	
6	User Rating Periods	Url Text		Column			<input type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>	

Figure 28: ADMIN >> Layout >> Page Layout >> ePathway General Enquiry - Rates >> Detail

Some notes regarding Figure 28 and the behaviour of Rates Charges and Previous Rates Charges columns:

- Both Rates Charges and Previous Rates Charges column groups can be included on the page layout, but only one will be displayed at any point in time. The presence of both will trigger the presence of the Previous Period Comparison switch (if active for the list). When the switch is On, the Previous Rates Charges group is displayed, and the Rates Charges group is hidden. When the switch is Off, the Previous Rates Charges group is hidden, and the Rates Charges group is displayed.
- The Previous Rates Charges column group allows all the fields available in the Rates Charges column group plus the “Previous” fields (see Table 1: Additional Rates Enquiry fields). However, which fields are included, and their order is independent to those defined in the Rates Charges group.
- The Previous Period Comparison switch will only appear when the current period is being displayed. **NOTE:** When projected data for a Rates strike is present for an assessment, the modelling data is considered the current period and the Pathway Rates current period is considered the previous period for the Previous Rates Charges column group.

### 3.2.2. ADDITIONAL TEXT CODES

To allow control over on-screen instructions and labels in ePathway, the follow new text codes have been added to the system. These are primarily for the introduction of being able to search for assessments by address and for the previous period comparison switch on the rates enquiry detail screen.

Table 2: Additional Text Codes

TEXT CODE	DEFAULT VALUE	DESCRIPTION
GeneralEnquirySearch.AssessmentNumberInstructions	Search for locations using the Assessment number:	Instructions on assessment number search screen.

TEXT CODE	DEFAULT VALUE	DESCRIPTION
GeneralEnquirySearch.AssessmentNumber	Assessment Number	Label on assessment number search screen.
GeneralEnquirySearch.EnterAssessmentNumber	Please enter a value for Assessment number	Instructions on assessment number search screen.
GeneralEnquirySearch.AssessmentNumberSearchInstruc	Use this option if you wish to search for an Assessment via the Assessment number. Please enter the Assessment number, then click on the search button to start the search.	Instructions on assessment number search screen.
GeneralEnquiry.PreviousPeriodComparison	Previous Period Comparison	Previous Period comparison switch label

### 3.2.3. EPATHWAY ENQUIRY SEARCH PARAMETERS

The ability to search for assessments via Address, Valuer General Number or the Assessment Number can be nominated for each Enquiry List.

**NOTE:** For the Registered User list it is recommended these searches be left so the system progresses to the ratepayer role search which is existing search behaviour.

General Enquiry Search

This page allows you to define the advanced search attributes and layout for each Enquiry List within each available General Enquiry module.

Select an Enquiry Module: ePathway General Enquiry - Rates

Select an Enquiry List: Rates Accounting

Sequence	Description	User Text	Active
<input type="checkbox"/>	Address Search	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Valuer General Search	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Assessment Number	<input type="text"/>	<input type="checkbox"/>

Figure 29: ADMIN >> Layout >> General Enquiry Search (Default Registered User List setup)

For all other lists council may sequence and activate the desired search options like those shown below for the Public Enquiry List.

General Enquiry Search

This page allows you to define the advanced search attributes and layout for each Enquiry List within each available General Enquiry module.

Select an Enquiry Module: ePathway General Enquiry - Rates

Select an Enquiry List: Public Enquiry List

Sequence	Description	User Text	Active
<input type="checkbox"/> 1	Assessment Number	<input type="text"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 2	Valuer General Search	<input type="text"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 3	Address Search	<input type="text"/>	<input checked="" type="checkbox"/>

Figure 30: ADMIN >> Layout >> General Enquiry Search (Public User List setup)

### 3.3. WAIKATO SPECIFIC CONFIGURATION GUIDELINES

Much of these points have been covered by examples in this document, but the following may assist:

- The Activity and Activity Code fields (and the associated selection screen shown in Figure 13) were introduced primarily to allow inclusion of the District for certain NZ councils. As such, when these fields are configured on the layout the label is expected to be changed from the default (E.g. “District”).
- Similarly, the Override Notice/Bill Description field for Waikato is populated with the Legal Description of the property by the data conversion. As such, altering the label when configuring this field within the layout is recommended for Waikato.
- When configuring the page layout for some of the fields/columns which are data dependent, it is advised to make use of the Omit if Null option to ensure empty table groups do not display unnecessarily.
- Totalling by Rates Category is automatically done only if the Rates Category is included within the Rates Charges/Previous Rates Charges column group. If the Rates Category field is omitted, then normal totalling for the table will take place.

### 3.4. CSS STYLE ENHANCEMENTS

To provide more granular control of the ePathway enquiry screens (for Rates and other enquiries additional naming of rendered controls has been introduced enabling targeted CSS styling. The specific changes are on the enquiry detail screen (EnquiryDetailView.aspx):

- The main parent group panel is now assigned an ID which is constructed with "DynamicParentGroup\_" + EnquiryListCode. E.g. The LRA enquiry list will have a “div” block of HTML like this:  

```
<div id="ctl00_MainBodyContent_DynamicParentGroup_LRA" class="Fields">
```
- Within the main group any column groups are now assigned an ID which is constructed with “DynamicGroup\_” + ColumnName + “\_” + GroupInternalId.  
 Eg. The Rates Charges column group will have a “div” block of HTML like this  

```
<div id="ctl00_MainBodyContent_DynamicGroup_Rates_Charges_617" class="field">
```
- Also, within the main group any fields are now assigned an ID which is constructed with “DynamicField\_” + FieldName + “\_” + FieldInternalId. This allows styling of individual fields and labels.  
 Eg. The Formatted Assessment Number field will have a “div” block of HTML like this:  

```
<div id="ctl00_MainBodyContent_DynamicField_Formatted_Assessment_Number_2975" class="field">
```
- Within the Rates Charges and Previous Rates Charges groups any inline totalling rows (i.e. Sub totals by rating category) are now assigned a CSS Class of “GridInLineSubTotal” or “GridInLineTotal” so these rows can be given a more unique appearance.  
 E.g. The sub total row will have the class assigned.  

```
<tr class="ContentPanel GridInLineSubTotal">
```

Which would enable this entry within the Styles.UX.css file to right-align and bold the totals.

```
form[action*="EnquiryDetail"View.aspx"] tr.GridInLineSubTotal > td, tr.GridInLineTotal > td {
    text-align: right;
    font-weight: bold;
```

## 4. PROJECTED RATES DATA

Rates Data can be used to present future forecast rating period data for comparison. I.e. When Display Projected Rates (see Figure 17) is active for an enquiry list, then the Rates Charges and Previous Rates Charges values are derived from modelling data previously uploaded into the LRARMRC table and the rates charges for the current Pathway rating period is then considered previous period data.

Table 3: Forecast Rates Data table (LRARMRC)

FIELD	DATA TYPE	DESCRIPTION
TPKLRARMRC	NUMERIC	Primary key. The next value of which should be taken from LASTNUM within the CSYNEXT table where ENTITY is 'LRARMRC'.
TFKLRAPERD	NUMERIC	Foreign key to LRAPERD table to identify the current Rating Period for which this model is to be compared. This is not the period for the projected/proposed data, but rather the period prior that the projected/proposed data to which it will be compared. Eg. If the data is intended for 2023/2024, then this key will point to the 2022/2023 period in LRAPERD.
TFKLRASSM	NUMERIC	Foreign key to LRAASSM table to indicate which assessment this data belongs.
TFKLRARTTY	NUMERIC	Foreign key to LRARTTY table to indicate which rating type this data row belongs.
MODELCODE	CHAR(10)	The code to identify this model (Eg. "PROP2023"). Note that this allows multiple models to be loaded for a rating period, but only one model will ever be used. The model used is nominated on the Rates Enquiry Parameters screen (see Figure 12). If no code is nominated on that screen, then the first model code encountered for the assessment/period combination will be used by default.
DESCR	VARCHAR(50)	Description for the model (Eg. "2023/2024"). If no description is provided on the Rates Enquiry Parameters screen (see Figure 12), this will be used as the description for the model period.
UNITDESCR	VARCHAR(50)	Description of the units (Eg. "CV" for Capital Value based units)
NUMOFUNITS	NUMERIC(13, 5)	Number of units (Without Percent applied) Will map to the <i>Valuation Units</i> field in ePathway. For Fixed charges, this is not used. For Unit charges, this would be number of units. Otherwise, this would typically be the valuation amount.
RATECHARGE	NUMERIC(16, 8)	Charge Rate Will map to the <i>Rate Charge</i> field in ePathway. For Fixed charges, this would be the fixed amount. For Unit charges, this would be the charge per unit. Otherwise, this would typically be the Rate in the Dollar.
AMOUNT	NUMERIC(12, 2)	Calculated Amount Typically [NUMOFUNITS] x [RATECHARGE] x [PERCENT] / 100 Note that not all rows will abide by that formula. (Eg. Additional charges rate types and tiered charges). Will map to the <i>Calculated/Generated Amount</i> fields in ePathway.
PERCENT	NUMERIC(7, 2)	Percent Rateability
CAPITALVALUE	NUMERIC(13, 5)	Capital Value for future period
LANDVALUE	NUMERIC(13, 5)	Land Value for future period
LANDAREA	NUMERIC(16, 5)	Land Area for future period (in square meters)

# ePathway Receipting

## Enhancements

### ePathway Payments

Incident: UX and Smart Clients	Work Item: 56023 KB:	Fix: ERS: 53964
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#### MANDATORY PAYER NAME AND ADDRESS FIELDS

The Payer Name and Address fields are now mandatory for all payments in ePathway if a public user requires a Receipt. This is in line with CityWatch behaviour.

### ePathway MyAccounts Debtor's Receipt

Incident: COGC 15341957 UX Client	Work Item: 57141 KB:	Fix: ERS:
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#### DUE DATE FIELD ADDED TO DEBTOR'S RECEIPT GRID

The Due Date field has been added on the My Accounts>> Debtor's Receipts grid. Where the outstanding amount is overdue the Due Date will appear in red text.

#### My Accounts - Invoice Details

Enter the amount you wish to pay for any of the invoices listed below. Please note that you cannot pay more than the outstanding amount shown.

Type [Debtors Receipt](#)  
Reference [25392 \(1\)](#)  
Location Description/Detail [Pathway Interface Debtor - Open Item](#)

Number of Invoices Found: 4

Invoice	Date	Reference	Amount	Payment Due	Payment
1703	16/03/2004	180544;discount fee	\$391.20	1/10/2003	<input type="text"/>
1708	16/03/2004	180545;Retail Food Outlets	\$12,120.50	1/10/2003	<input type="text"/>
1740	23/03/2004	180624;discount fee	\$114.00	1/10/2003	<input type="text"/>
24933	14/02/2019	180638	\$10.00	21/04/2004	<input type="text"/>

Previous

Next page

# Infringements

## Enhancements

### Cycle Function Selection Interface - Prosecution Validation

Incident: ACC 16255202 UX Client	Work Item: 2853 KB:	Fix: 03107717 ERS:
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#### PROSECUTION VALIDATION CONTROL

A correction has been made to the Prosecution Validation Control form. Previously when selecting the Prosecution Validation menu option, an error page was displayed instead of the Prosecution Validation Control form.

### Infringement Maintenance

Incident: UX and Smart Clients	Work Item: 58319 KB:	Fix: 03107728, 03107729 ERS: 86383
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#### NAMES MAINTENANCE

The Licence Number field for Victorian Parking Infringements has been increased from 8 characters to 9 characters.

### Infringement Extract

Incident: UX and Smart Clients	Work Item: 58393 KB:	Fix: 03107726, 03107728 ERS: 86613
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#### INFRINGEMENTMENT EXTRACT CONTROL

The Infringement Extract has been enhanced to extract the Start Date from New Zealand Parking Infringements. For the Start Date to be extracted the new field STARTDATE must be added to the export format to be used by the Infringement Extract Control form.

← Export/Import Format Maintenance

Save Undo Delete

Entity

Entity \*

Field

Selected Field (27 results) + Add → Details ...

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	FMTTICKNUM - Ticket Number	Ticket Number
<input type="checkbox"/>	NOTNTYPE - Notification Type	Notification Type
<input type="checkbox"/>	OFTPTYPE - Offence Type	Offence Type
<input type="checkbox"/>	STARTDATE - Start Date	Start Date
<input type="checkbox"/>	OFNCDATE - Offence Date	Offence Date
<input type="checkbox"/>	ISSUEDATE - Issue Date	Issue Date

# Inspections

## Enhancements

### Inspections Maintenance

Incident: TOOW 16325917  
UX Client

Work Item: 57991  
KB:

Fix: 03107724, 03107726  
ERS:

#### INSPECTION MAINTENANCE

An enhancement has been made to the Inspection Maintenance form to enable the Notes Details text area to grow automatically as content is entered. Previously, only the first four lines of the note were visible on the form, the user needed to scroll down to see the rest of the note.

# Property Administration

## Enhancements

### Transfer of Ownership Maintenance

Incident: COGC 11013421 UX Client	Work Item: 56220 KB:	Fix: 03107726, 03107728 ERS:
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#### TRANSFER OF OWNERSHIP MAINTENANCE

An enhancement has been made to the Transfer of Ownership Maintenance form. Workflow actions that are configured to send an email can now contain the Property Transfer Date in the email subject or body. This can be done by adding the text %TRANDATE% to the e-mail text for the relevant Workflow Action. Similarly, the Property Transfer Price can also be included using "%TRANPRICE%".

This applies to sites that have configured a Workflow Task to automatically start upon accepting a Property Transfer.

In addition, the message **No Debtor Details have been entered** that can appear when accepting a Property Transfer without first entering a Debtor Number, has been modified to have a **Continue** button instead of an **OK** button to more accurately convey that the process will continue when the button is clicked.

### Parcel Number

Incident: MELB 16661372 UX Client	Work Item: 59084 KB:	Fix: ERS: 89610
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#### INCREASE PARCEL NUMBER FROM 6 TO 20 CHARACTERS

The Parcel Number field on Parcels in the Property Administration module has been increased in length to cater for the longer Parcel Numbers required by some Councils. This change applies to Thick Client, Smart Client, and Pathway UX interfaces.

**NOTE:** If Pathway integrates with external systems using Parcel Numbers the integration should be reviewed.

# Rates Accounting

## Enhancements

### Archive/Purge Run Enquiry

Incident: UX Client	Work Item: 2151 KB:	Fix: ERS:
------------------------	------------------------	--------------

#### ARCHIVE/PURGE RUN ENQUIRY

Improvements have been made to this function as follows:

- A Search Profile is available, allowing searching over Run Date, Run Code and Run Description.
- The Media details and Run Note are visible on the main form, avoiding the need to open another form.

### Rating Period Rate Type Maintenance

Incident: UX Client	Work Item: 56923 KB:	Fix: 03107715 ERS: 74238
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The Rates Accounting module has been enhanced:

1. To allow the discount parameters for a Rate Type to also be nominated at the Rating Period Rate Type level.
2. For the discount percentage to be overridden at the Rating Period Rate Type level. This allows discount to be controlled on a Rating Period basis, if required. For example, discount may be available on a certain Rate Type in the Current Rating Period but not in subsequent Rating Periods. Or the discount percentage for a certain Rate Type may incrementally decrease Rating Period by Rating Period.

The following new fields have been added to the Rating Period Rate Type Maintenance form:

- Discount Method
- Ignore when Granting Discount
- Override Discount Percentage

These new fields are only available for Rates Rate Types with the following Calculation Methods:

- Rateable Value x Rate in Dollar
- (Rateable Value x Rate in Dollar) + Additional Charge

Discount Method and Ignore When Granting Discount

These new field values are inherited from the equivalent Rate Type fields of the same name. To override the value for a Rating Period Rate Type, select one of the dropdown values that does not have the "(Default)" suffix shown.

Override Discount Percentage

If a value is entered it will be used as the Discount Percentage for the Rating Period Rate Type. This will be the case regardless of the Discount Period parameters. If a value is not entered, the relevant Discount Percentage from the Discount Periods will be used, as per existing functionality.

Discount Calculation

Consider the following example where there is one Discount Period for 10% (in Rates Discount Period Maintenance) and the Discount details for Rate Types A, B and C are different for Rating Periods 21/22 and 22/23, and the current period is 22/23:

Rating Period	Rate Type	Discount Method	Override Discount Percentage

Rating Period	Rate Type	Discount Method	Override Discount Percentage
21/22	A	Percentage	(None, so will inherit the default 10.00 %)
22/23	A	Percentage	5.00 %
21/22	B	Percentage	2.00 %
22/23	B	No Discount	-
21/22	C	No Discount	-
22/23	C	Percentage	12.00 %

The following transactions are created for an Assessment by the Rates Generation for Rating Period 22/23. The Pending Discount is calculated on the Current Rating Period Rates and so uses the Rate Type discount details for 22/23:

Transaction Type	Rate Type	Raised for Period	Generation Run	Amount	Notes
Generated Rate	A	22/23	22/23 Rates	15,000.00	
<b>Pending Discount</b>	<b>A</b>	<b>22/23</b>	<b>22/23 Rates</b>	<b>-750.00</b>	<b>15,000 x 5%</b>
Generated Rate	B	22/23	22/23 Rates	10,000.00	(No discount)
Generated Rate	C	22/23	22/23 Rates	5,000.00	
<b>Pending Discount</b>	<b>C</b>	<b>22/23</b>	<b>22/23 Rates</b>	<b>-600.00</b>	<b>5,000 x 12%</b>

If a Supplementary Rate adjustment is performed that increases the rates raised for 21/22 and 22/23, the following transactions (in **bold**) are created. The additional Pending Discount is calculated on a mixture of current and prior period rates and so uses the Rate Type discount details for 21/22 and 22/23 as described in the Notes column:

Transaction Type	Rate Type	Raised for Period	Generation Run	Amount	Notes
Generated Rate	A	22/23	22/23 Rates	15,000.00	
Pending Discount	A	22/23	22/23 Rates	-750.00	15,000 x 5%
<b>Previous Period Gen Rate</b>	<b>A</b>	<b>21/22</b>	<b>April Supp</b>	<b>900.00</b>	
<b>Generated Rate</b>	<b>A</b>	<b>22/23</b>	<b>April Supp</b>	<b>800.00</b>	
<b>Pending Discount</b>	<b>A</b>	<b>22/23</b>	<b>April Supp</b>	<b>-130.00</b>	<b>21/22: 900 x 10% = 90</b> <b>22/23: 800 x 5% = 40</b>
Generated Rate	B	22/23	22/23 Rates	10,000.00	(No discount)
<b>Previous Period Gen Rate</b>	<b>B</b>	<b>21/22</b>	<b>April Supp</b>	<b>700.00</b>	
<b>Generated Rate</b>	<b>B</b>	<b>22/23</b>	<b>April Supp</b>	<b>600.00</b>	
<b>Pending Discount</b>	<b>B</b>	<b>22/23</b>	<b>April Supp</b>	<b>-14.00</b>	<b>21/22: 700 x 2% = 14</b> <b>22/23: (no discount)</b>
Generated Rate	C	22/23	22/23 Rates	5,000.00	
Pending Discount	C	22/23	22/23 Rates	-600.00	5,000 x 12%
<b>Previous Period Gen Rate</b>	<b>C</b>	<b>21/22</b>	<b>April Supp</b>	<b>500.00</b>	
<b>Generated Rate</b>	<b>C</b>	<b>22/23</b>	<b>April Supp</b>	<b>400.00</b>	
<b>Pending Discount</b>	<b>C</b>	<b>22/23</b>	<b>April Supp</b>	<b>-48.00</b>	<b>21/22: (no discount)</b> <b>22/23: 400 x 12% = 48</b>

#### Fixed Discount Amount

For sites that use Fixed Discount, if the Discount Calculation for a given Rate Type and Generation Run is based on amounts across different Raised for Periods (\*) and a “Fixed Discount” Method applies to any of those Periods, the Discount Calculation will ignore the Rating Period Rate Type Discount details for all prior Rating Periods and perform the calculation using the Current Rating Period Rate Type Discount details. This rule is in place due to the nature of Fixed Discount and the absence of business rules for such a calculation.

*(\*) The Rate Type discount details for the Current Rating Period are always considered regardless of whether there is an amount for the Current Rating Period.*

### **Supplementary Calculation Results**

For sites using Online Supplementary Calculations, the Supplementary Calculation Results form displays the Discount amounts against transactions for the Current Rating Period only, even though the Discount amounts may have been calculated using the Supplementary Rate amounts for different Rating Periods.

### **Ignore when Granting Discount**

If “Ignore when Granting Discount” is set to “Yes” for a Rating Period Rate Type, then any debts for that Rate Type and Raised for Period do not need to be paid for actual Discount to be granted. The Ignore when Granting Discount setting is only valid and recognised when the Discount Method is set to “No Discount”.

**NOTE:** for a given Rate Type there is the potential for Pending Discount to be calculated based on Rates for different Raised for Periods (e.g. a Supplementary Rate spanning multiple Rating Periods) where the Rate Type that has “No Discount” and Ignore when Granting Discount set to “Yes” for one Period, and “Percentage Discount” for another Period. In this peculiar situation the presence of the Pending Discount will cause the Ignore when Granting Discount setting to be ignored.

### **End of Period Roll**

When this function copies Rate Types from the prior Rating Period to the new Rating Period, it will also copy the new Rating Period Rate Type discount details.

### **Bulk Rate Type Copy**

When this function copies Rate Types from the prior Rating Period to the new Rating Period, it also copies the new Rating Period Rate Type discount details.

### **Journal Entry and Batch Journal Maintenance**

Previously, attempting to enter a Previous Period Discount (DISC-P) transaction for a Rate Type that did not allow discount would produce a validation error. This has been modified to instead produce a warning message if the Rate Type does not allow discount in the current period, since it may have allowed discount in a prior period.

### **Batch Update**

The condition for the recalculation of Pending Discount for an Assessment has been modified. Previously, it checked whether a transaction for a Rate Type that allowed discount was updated. It now checks whether a transaction for a Rate Type that allows discount for the “Raised for Period” of the transaction is updated. Currently, only Previous Period Rebate (REB\*-P) transactions influence the amount of discount available when the Raised for Period is a prior Rating Period, and the Rebates Reduce Discount parameter is set on.

### **Rebate Validation and Claims**

In Western Australian mode, the warning message that is issued if the claims amount on transactions do not balance now considers the discount details at the Rating Period Rate Type level.

### **Waste Rate Type Verification**

Previously, an error was reported if a Service or Grouping Rate Type allowed Discount. This has been modified to check whether the given Service or Grouping Rate Type allows Discount for the given Rating Period being considered.

## Rate Notice (NZ)

Incident: UX and Smart Clients	Work Item: 57349 KB:	Fix: ERS: 82236
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### RATE NOTICE (NZ) CONTROL

Enhancements have been made to the following functions to populate the Charge Line Details and associated Extract Types with the Rateable Valuation Type Code of the Valuation Type that was used to create the charge line:

- Rates Notice (NZ)
- Generate Rates Notice (NZ) (option in Assessment Maintenance)
- Rates Notice
- Generate Rates Notice (option in Assessment Maintenance)
- Supplementary Rate Notice Report
- Generate Supplementary Rate Notice (option in Assessment Maintenance)

To allow the above to occur the following has been done:

- New extract fields have been added for inclusion in Rates Extract Types based upon the following Extract Type Lists:
  - CHRGLINE: Rateable\_Valn\_Type\_Code
  - RATENOTSUPPS: Supp\_RateableValn\_Type\_Cd
  - CHRGLNSU: Rateable\_Valn\_Type\_Code
- These new extract fields have been added to Rates Accounting >> Housekeeping >> Export Format Data String Maintenance menu option in UX for exporting Notice files:
  - For the Rates Notice Report, the 'Rateable Valuation Type' field has been added to the Charge Line Details Group and the 'Supp Rateable Valuation Type' field has been added to the Supp Charge Line Details Group.
  - For the Supplementary Rates Notice Report, the 'Rateable Valuation Type' field has been added to the Charge Line Details Group.
  - Note: Corrections have been made to the Export Format Data String Maintenance function so that when multiple Field Names are selected for loading to the Export Format all the selected items are loaded. Previously only the last Field Name item was loaded.

## Rates Generation Selection

Incident: UX Client	Work Item: 57892 KB:	Fix: ERS: 75321
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### RATES GENERATION: CONSOLIDATION OF GL TRANSACTIONS

\*\*\* Gold Coast City Council only \*\*\*

The following is only relevant when the "Posting Period Allocation Method" Rates system parameter is set to "Generation Run Notice Date and Transaction Effective Date".

As part of running the Rates Generation Update, rates transactions are created with similar transactions being consolidated for loading to the GL transaction file CFITRAN.

Previously, this consolidation into the GL transaction file would occur for rates transactions having the same values for the following items: TPKLRARTTY, TPKLRATTUS, ACCTTYPE, TAXDATE, DATCFITRAN.

Enhancements have been made to the Rates Generation Update so that consolidation now occurs for rates transactions having the same values for the following items: TPKLRARTTY, TPKLRATTUS, ACCTTYPE, TAXDATE. Therefore, the General Ledger Transaction Export that is run after the Rates Generation Update should take less time than previously.

Note: For all other Rates functions, consolidation will continue to occur for transactions having the same values for the following items: TPKLRARTTY, TPKLRATTUS, ACCTTYPE, TAXDATE, DATCFITRAN.

# Receipting

## Enhancements

### EFTPOS Integration

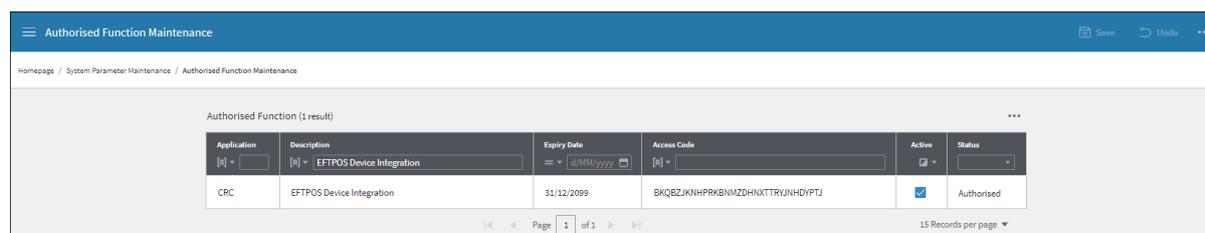
Incident: UX Client	Work Item: 56632 KB:	Fix: ERS: 63898
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\*\*\*AUTHORISED FUNCTION \*\*\*\*

A new Authorised function, **EFTPOS Device Integration**, has been developed to facilitate the Receipting module with EFTPOS device integration. When creating the new receipt, this will facilitate direct EFTPOS payments through the system, via Linkly integration.

To use Linkly, Council will need to contact their Bank advising to use "Infor Public Sector" as the Linkly accredited vendor. After the successful setup with the Bank, Council is responsible for registering the 'EFTPOS' devices on the Linkly Website (your Bank should provide relevant details).

The authorised function **EFTPOS Device Integration** must be authorised via System Administration >> System Parameters >> System Parameter Maintenance >> Options >> Authorised Function before EFTPOS Device Integration can be used.



Application	Description	Expiry Date	Access Code	Active	Status
CRC	EFTPOS Device Integration	31/12/2099	BKQBZJKNHPRKBIMZDHNXTTRVJNHDPJTJ	<input checked="" type="checkbox"/>	Authorised

Figure 1

### Configuration

- **System Parameter Maintenance**  
Configure the Linkly API environment and EFTPOS setting via System Administration >> Integration >> System Parameter Maintenance



Linkly Configuration

API URL

Production

Sandbox

Cut EFTPOS Receipt

Figure 2

- **Receipting Authorities**  
Assign the new function 'EFTPOS Configuration' via Receipting >> Receipting Parameters >> Receipting Authorities.

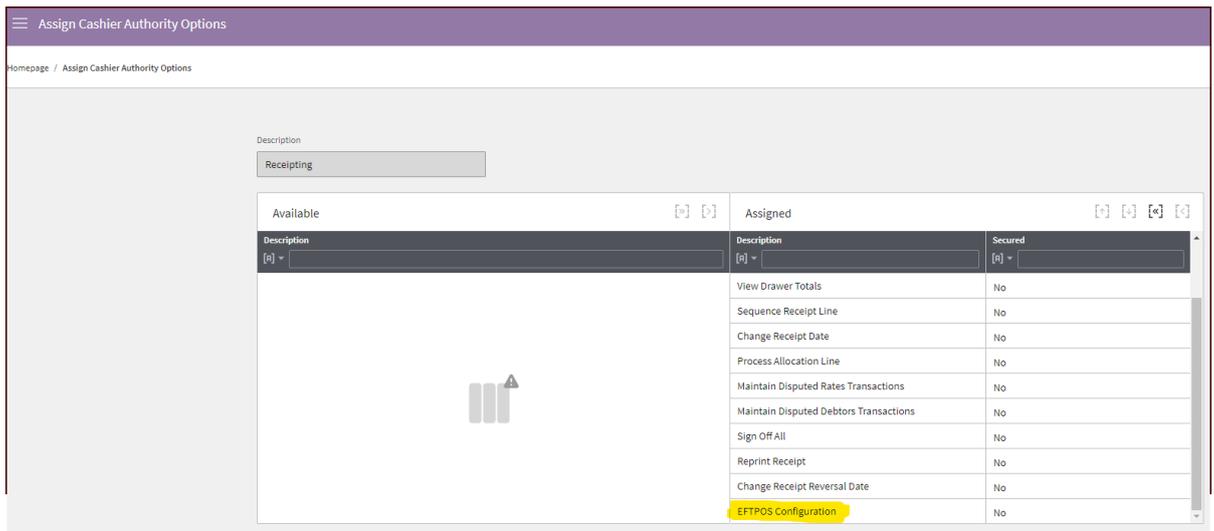


Figure 3

- User Authorities**

Assign the new Responsibility 'EFTPOS Configuration' to the relevant Responsibility Groups via Receiving >> Receiving Parameters >> User Authorities.

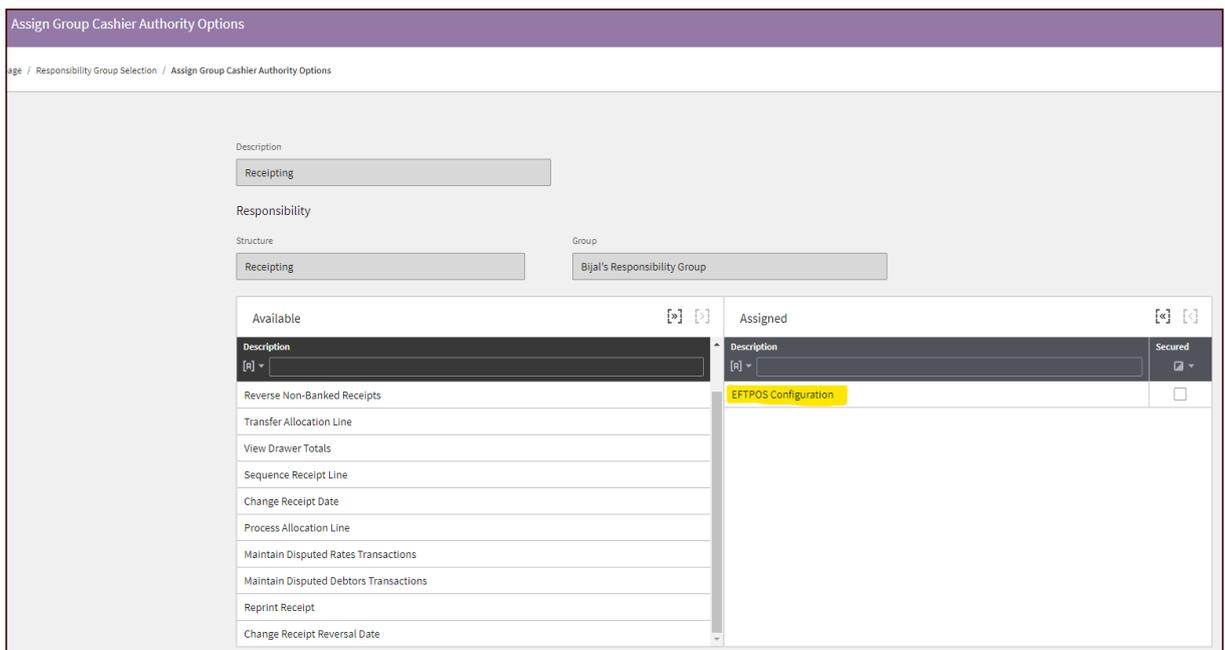


Figure 4

- Payment Group Filter**

Configure a new Payment Group and Payment Types to enable the 'EFTPOS Integration' via Receiving >> Receiving Parameters >> Payment Group Filter.

*The EFTPOS Integration toggle is only available for New Payment Groups. Existing Payment Groups cannot be configured for EFTPOS integration.*

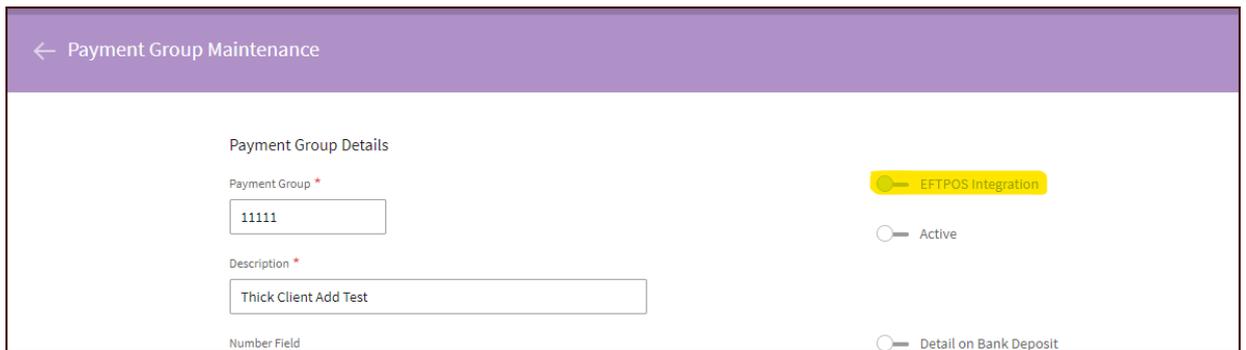


Figure 5

- EFTPOS Terminal Identifier**  
 Assign Linkly credentials (configured via Linkly website) for the EFTPOS device via Receiving >> Receiving Parameters >> EFTPOS Terminal Identifier Maintenance.

The Username and password must match those configured in Linkly.

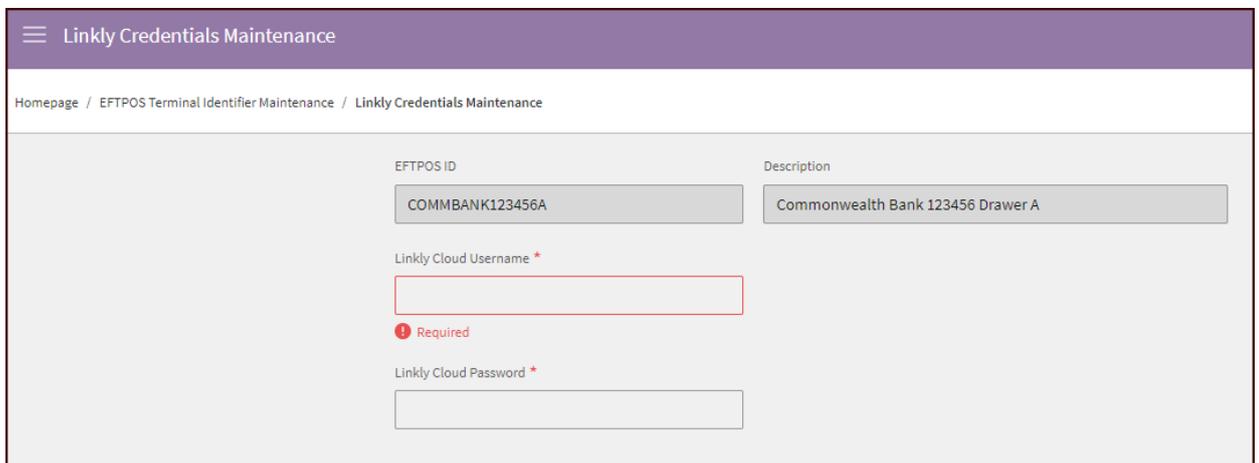


Figure 6

The form provides the options below to maintain existing account details or remove the EFTPOS device from the Linkly account.

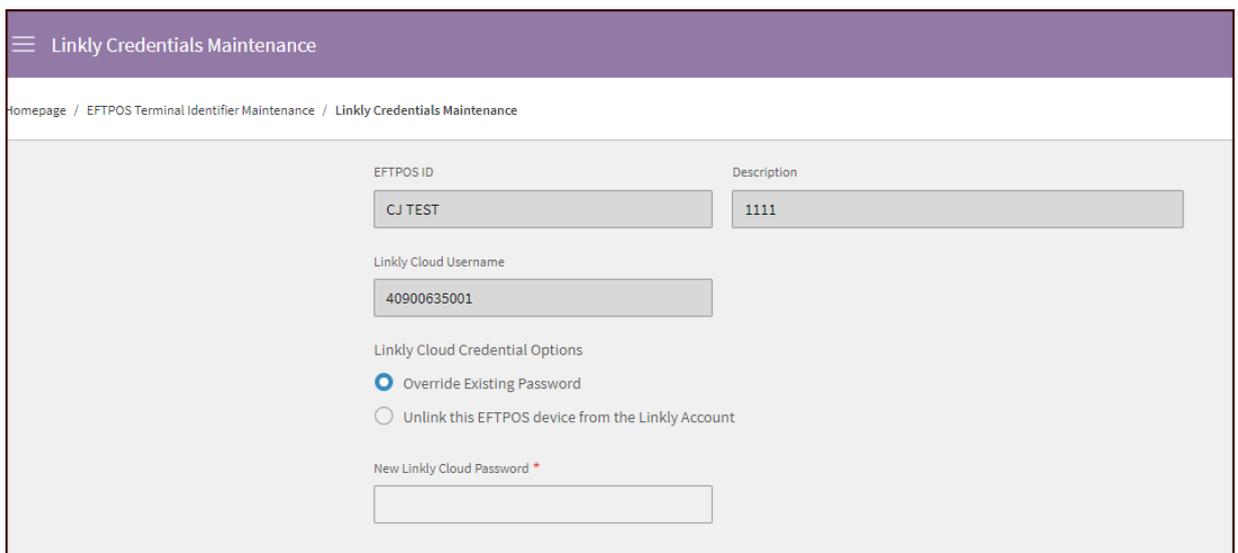


Figure 7

- Drawer Maintenance**

To satisfy Linkly requirements for the POS ID/Drawer ID, a new unique POS ID needs to be generated via Receiving >> Receiving Parameters >> Drawer Maintenance.

Figure 8

### EFTPOS Transactions in Action:

#### 1. Cashier Sign On

When a Cashier signs on to a drawer to be used for EFTPOS processing via Receiving >> Cashier Sign On, fill in standard required fields such as 'Drawer'. Ensure an 'EFTPOS ID' is selected, and then go to Options >> Pair to Linkly to connect the EFTPOS terminal with Linkly.

Figure 9

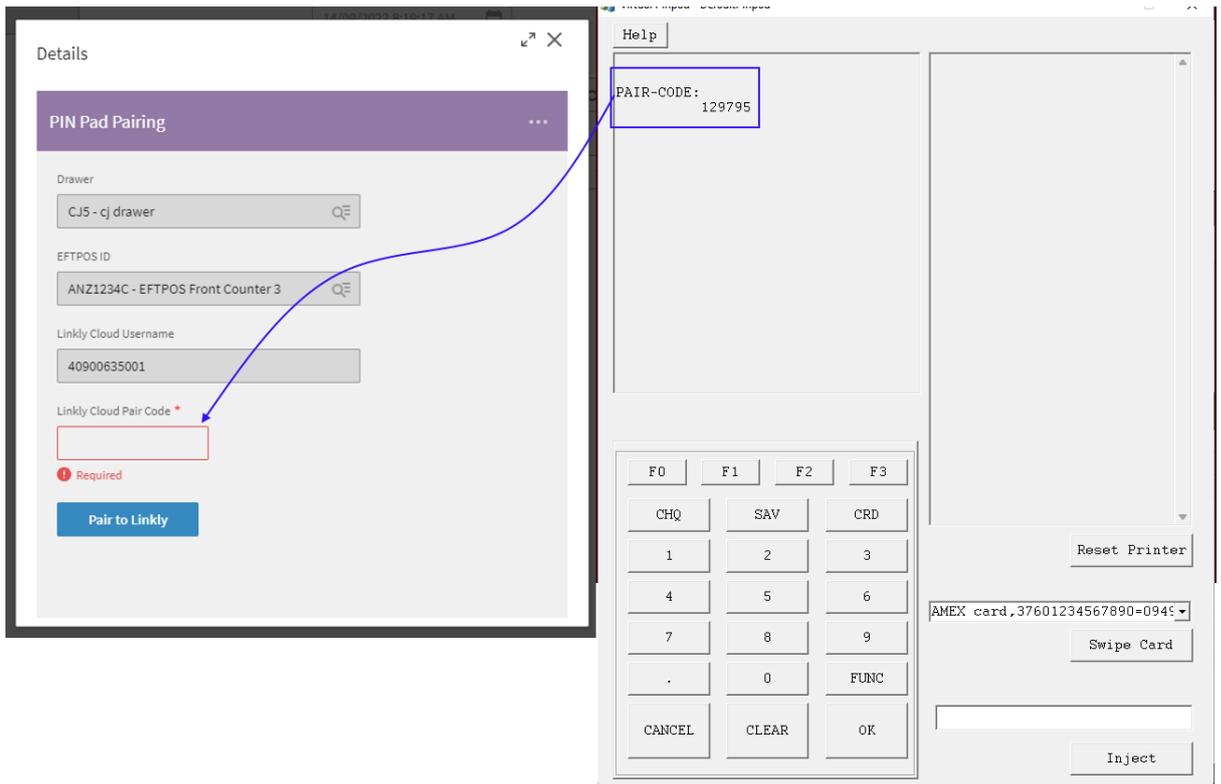


Figure 10

Enter the Pair code displayed on the EFTPOS Device and select 'Pair to Linkly'.

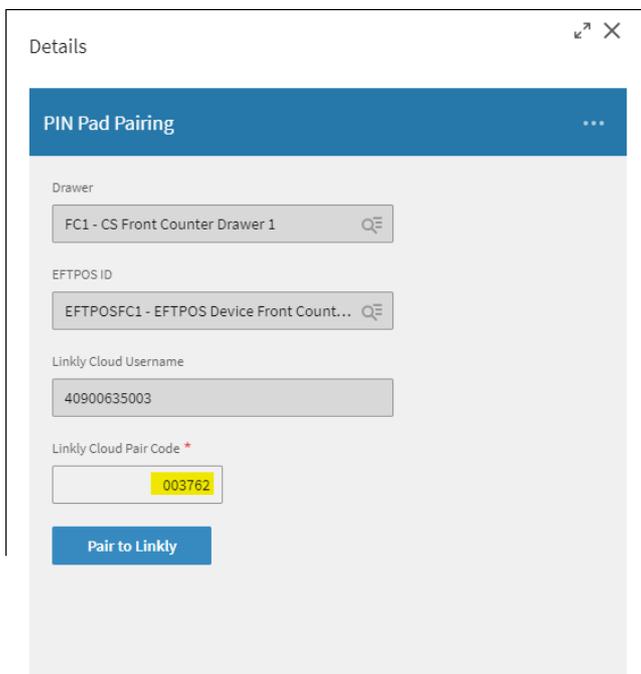


Figure 11

A pop-up message should appear advising that the pairing was successful. A connection between Linkly and the EFTPOS Device should now be established.

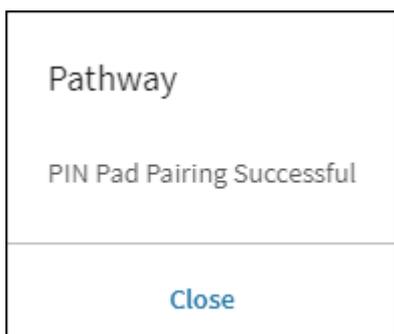


Figure 12

If for some reason, the EFTPOS terminal does not display a Pair Code, please refer to the user guide for the specific device make/model.

## 2. Receipt Entry

When adding payment line(s), ensure the Payment Type selected is configured for EFTPOS Integration, complete all necessary fields, and click *Accept* to process the receipt as per standard procedure.

 A form titled "Payment Line" in a dark blue font. Below the title, there is a label "Amount Tendered" followed by an empty rectangular input field. Below that is a label "Payment Type" followed by a dropdown menu. The dropdown menu is open, showing a single option: "EFTV - EFTPOS Visa Payment (No MSF)" which is highlighted in yellow. To the right of the dropdown is a small icon of a list with a magnifying glass.

Figure 13



Figure 14

The *EFTPOS Transaction Processing* form will then be displayed. Select the Payment Line to be processed and click the relevant *Purchase/Refund/Status* button.

*The Status operation will check the status of each selected transaction performed through the EFTPOS Device. In the case of a Power failure or similar situation resulting in the UX client being forcibly closed, the cashier will need to access the suspended receipt, click 'Accept' and perform a 'Status' check to be able to continue processing the transaction as the Purchase/Refund button will be unavailable.*

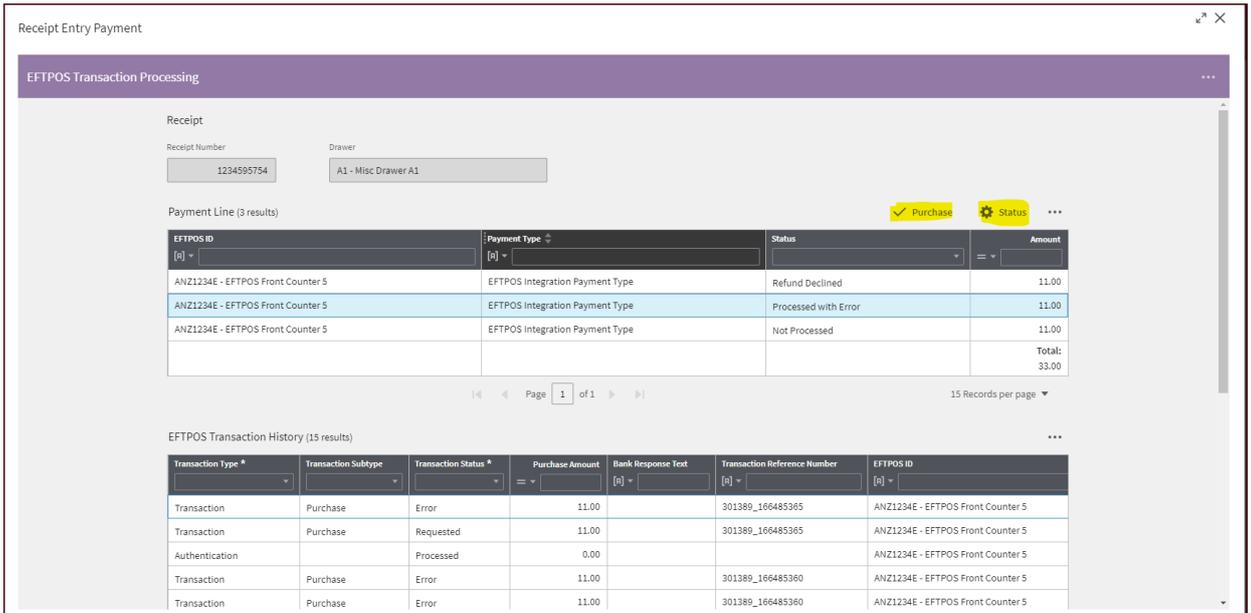


Figure 15

3. Receipt Reversal

For receipts that have approved EFTPOS transactions, a reversal can only be completed after the EFTPOS transaction has been refunded through the EFTPOS device.

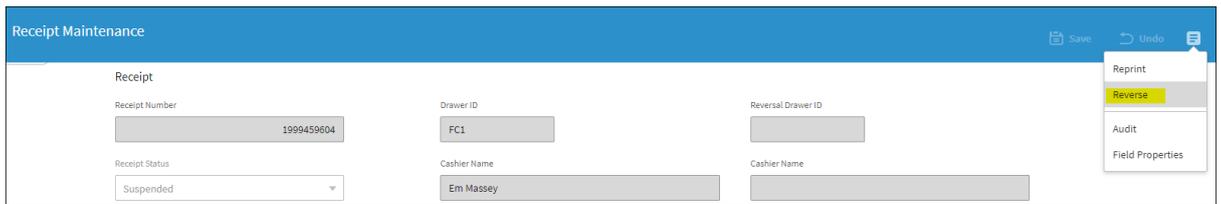


Figure 16

The *EFTPOS Transaction Processing* form will be displayed, and a refund must be processed to continue with the reversal. Once the refund has been completed, click on 'Continue' to reverse the receipt.

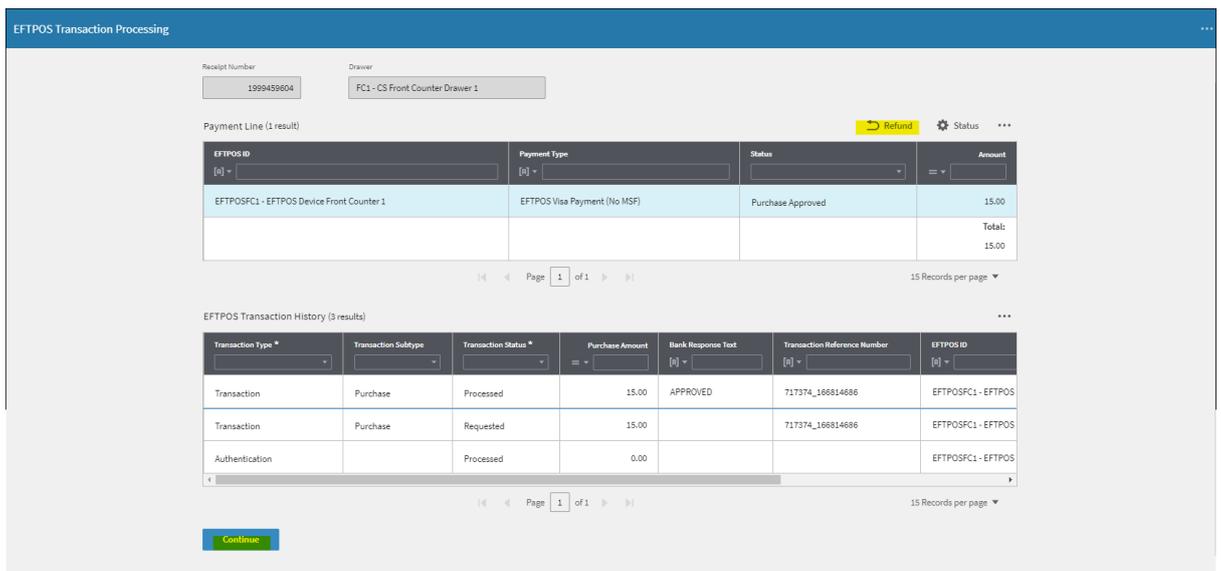


Figure 17

*Attempting to reverse a receipt without refunding the linked EFTPOS transaction will result in a warning until the EFTPOS transaction has been refunded.*

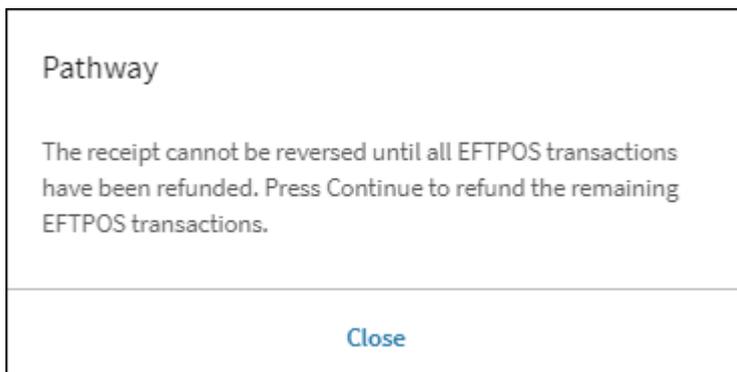


Figure 18

#### 4. **Cancelling/Voiding a Receipt**

To void or cancel a receipt with an approved EFTPOS transaction, the transaction must be refunded through the EFTPOS device first.

*Attempting to cancel or void a receipt that has a successful EFTPOS transaction linked will result in a warning until the EFTPOS transaction itself has been refunded.*

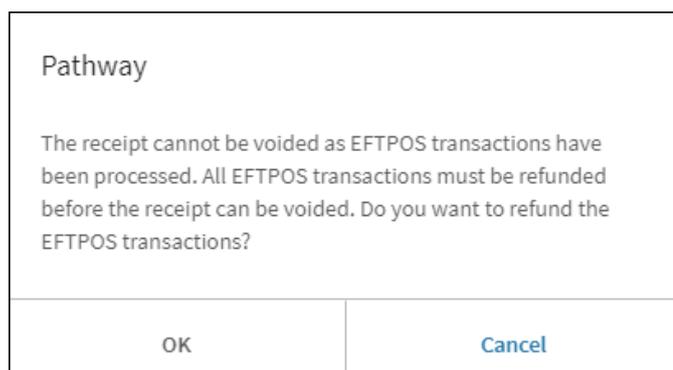


Figure 19

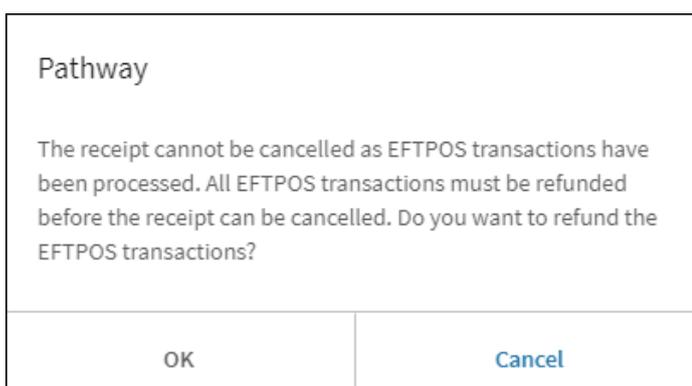


Figure 20

#### 5. **Suspending a Receipt**

It is possible to suspend a receipt with an approved EFTPOS transaction, however as with all suspended receipts, the cashier will not be able to sign off the drawer until the suspended receipt is processed, or the EFTPOS transaction refunded, and the receipt cancelled/voided.

#### 6. **Cashier Sign Off**

Upon Signing off via Receipting >> Cashier Sign Off, a Settlement process on the ETPOS device will be attempted.

*Note that signing off a drawer via Receipting >> Supervisor Drawer Enquiry will not trigger the Settlement process to occur. Most devices have pre-set or defined procedures for Settlement, so in the case of Settlement not being run successfully upon sign off or Supervisor Drawer Enquiry sign off, settlement should be performed manually as per standard procedures.*

## Filter Receipts for EFTPOS Integration Payment Types

A new tab has been introduced into the Receipt Search Profile to facilitate searching for Receipts with EFTPOS Transactions based on various criteria.

The screenshot shows the 'Receipt Search Profile' interface. At the top, there is a navigation bar with a hamburger menu and the title 'Receipt Search Profile'. Below this, a breadcrumb trail reads 'Homepage / Receipt Search Profile'. A horizontal menu contains several tabs: 'Receipt Details', 'Payment Details', 'Allocation Details', 'Bank Reference', 'Remittance Number', 'Advam Reference', 'EFTPOS Transaction' (which is highlighted in yellow), and 'Tag'. Below the tabs, there are several search filters:
 

- EFTPOS ID:** A text input field with a search icon.
- Date/Time:** Two date pickers with a range separator and a double arrow icon.
- Purchase Amount:** Two text input fields with a range separator and a double arrow icon.
- EFTPOS Transaction Status:** A dropdown menu currently set to '(All)'.
- Search Order:** A dropdown menu currently set to 'Descending'.

Figure 21

## InfoMart

Two additional fields *EFTPOS\_Status\_Code* and *EFTPOS\_Status\_Description* have been added to the *Receipt\_Payment\_Link* table in InfoMart to show the EFTPOS Transaction Status details.

## Supported Linkly Operations

- Transaction - Purchase/Refund
- Settlement
- Status - Status of the last transaction performed on the EFTPOS Terminal.

## External Receipt Import

Incident: UX Client	Work Item: 57867 KB:	Fix: ERS: 83323
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### EXTERNAL RECEIPT IMPORT CONTROL

The External Receipt Import function has been enhanced to include a 'Rename File' run parameter which allows a server import file to be renamed. This field is only available when 'Load File' is checked On and 'File Mode' is set to Server.

If the 'Rename File' is checked On and the function is run, after the import file has been processed the import filename will be changed by a) appending the date and time that the file was loaded, and b) changing the file extension to ".bak".



# Word Processing

## Enhancements

### Word Processing

Incident: BALL 14796912, ACC 16331324  
 UX Client  
 Work Item: 50880  
 KB:  
 Fix: 03107724  
 ERS:

#### ADD DOCUMENT REQUEST

Changes have been made to this form to help streamline the document request entry process. This form is used across many modules.

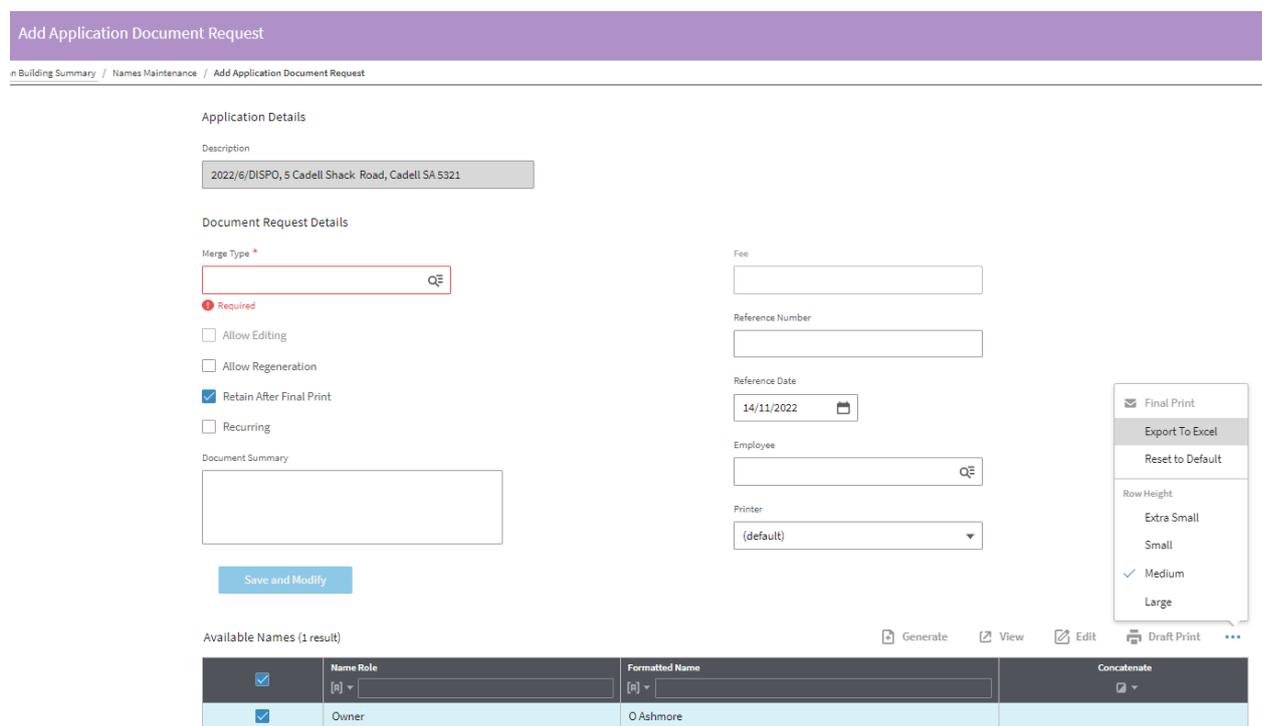


Figure 1

The following buttons have been added to the Available Names grid, bottom of Figure 1:

BUTTON	ACTION
<b>Generate</b>	When selected, the document request details are saved, and automatically initiates document generation.
<b>View</b>	When selected, behaves as the Generate button, but automatically opens the first generated document for viewing after generation.
<b>Edit</b>	When selected, behaves as the Generate button, but automatically opens the first generated document for editing after generation.
<b>Draft Print</b>	When selected, behaves as the Generate button, but automatically prints draft hard copies of the generated documents, or sends draft e-mail messages as dictated by each recipient's preferred delivery method. For hard copies, the default printer can be overridden by selecting a locally available printer from the new Printer dropdown field now appearing in the Document Request Details field set.

<b>BUTTON</b>	<b>ACTION</b>
<b>Final Print/Finalise</b>	When selected, a document request with the given details is saved, and the form navigates to Document Request Maintenance and automatically opens the Document Processing dialog to display confirmation notifications. The user can then select "Accept" to initiate document finalisation. When printing hard copies of documents, the default printer can be overridden by selecting a locally available printer from the new Printer dropdown field now appearing in the Document Request Details field set.