

Pathway RELEASE NOTES

Enhancements

3.10.024



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Pathway Release 3.10.024

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Introduction

This document describes enhancements and new functionality made available in Release 3.10.024 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 3.10.024 Enhancements.pdf
- Infor Pathway Release Notes 3.10.024 Fixes and Software Corrections.pdf
- Infor Pathway Release Notes Summary 3.10.024.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

Deploy External Driver

Incident:	Work Item: 59902	Fix:
UX Client	KB:	ERS:

DEPLOY EXTERNAL DRIVER

The ability to deploy external Generic EDMS, Data Publishing and Chart drivers and configuration files has been added to the UX client as the System Administration >> Integration >> Deploy External Driver menu option for the trusted mode user. Previously this deployment required manual steps to copy files and direct access to the application server machines. This new process is available for on-premise and single tenant cloud deployments. When multiple applications servers are in use the files are deployed to all of these in one action. Updated versions of the Generic Connector SDK and the Dashboard SDK are available on request that contain additional details.

GIS Integration

Incident: ADEL 16938146	Work Item: 59904	Fix:
UX Client	KB:	ERS:

UXWS (UX WEB SERVICE) AND URL GIS INTERFACE ENHANCEMENT

The UXWS GIS interface, only available in Pathway UX, has been enhanced to allow identification of the Pathway User with a User Claim instead of the Pathway User ID. This feature is optional. Details of the enhancement and configuration parameters in Pathway required to use this feature are available in version 1.1 of the SDK documentation available on request.

USER SEARCH PROFILE

The System Administration >> Menu >> User Maintenance form has been enhanced to add the ability to search by user claims to assist with troubleshooting of user claim related issues.

Paperclip Attachment Enhancements

Incident:	Work Item: 58716	Fix:
UX Client	KB:	ERS: 67900

ATTACHMENT MAINTENANCE

The ability to send one or more Paperclip Attachments by email has been added to the Attachment Maintenance form for all modules that have Paperclip Attachments. This feature includes the ability to send either plain text ad hoc emails or more formatted emails using an email template.

This is available for Paperclip Attachments that are stored in an external EDMS and for those that are not.

In addition, the Attachment Maintenance form now has a new E-Mail History option to display all the emails that have been sent for the item to which the Paperclip Attachment applies (for example the Property, Rates Assessment etc.).

These features are automatically available after upgrading without any configuration necessary although email templates are not automatically in place. To be able to use email templates when sending Paperclip Attachments via email requires the templates to be defined in parameter settings.

One example use of this feature is to be able to re-issue a Rates Notice by email that has previously been printed by an external printing house and then attached to the Rates Assessment as a PDF file Paperclip Attachment. This might be to re-issue it to the Ratepayer(s) for the Assessment or to send it to another interested party such as a bank or lending institution.

As a Pathway user, the process to send one or more Paperclip Attachments to any recipient is simple. Go to the Paperclip option from the required business object (for example a Rates Assessment), select the attachment(s) that need to be sent and click on the new Send button (Figure 1):

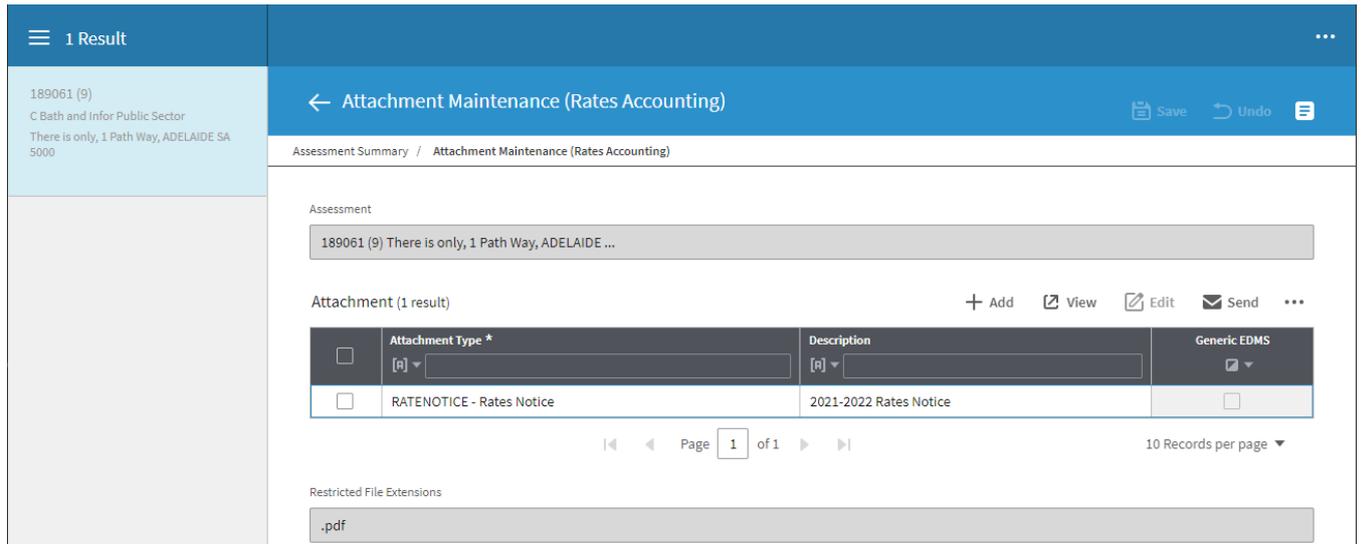


Figure 1

Without any email template defined the user will see a dialog appear (Figure 2) and then needs to enter a subject for the email. You may notice that the Ratepayer for this Rates Assessment has been defaulted as the To Recipient because it has an appropriate Email Communication Type recorded.

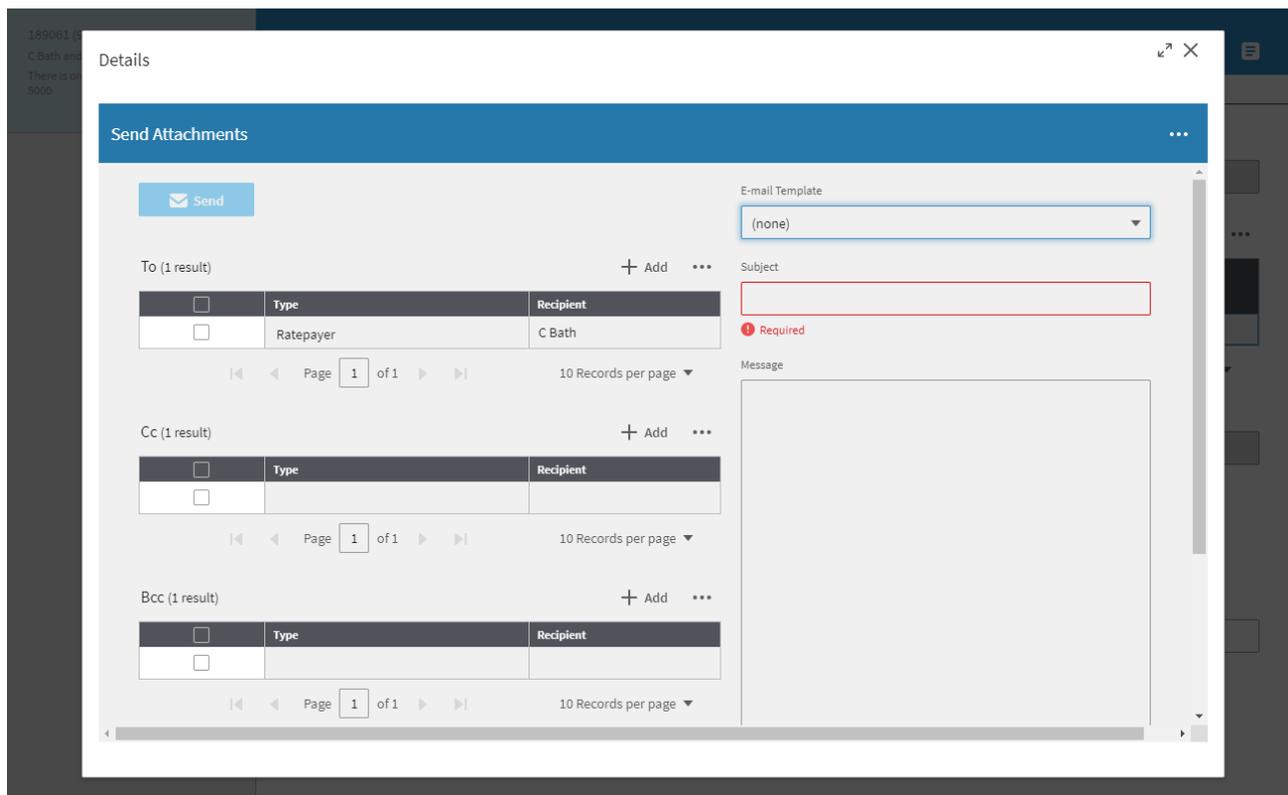


Figure 2

If a single email template is defined for the Attachment Type within the context of the business object (in this case the Rates Assessment) it will be automatically selected. If more than one email template is available, the user needs to select the template or choose not to use one.

The recipient details can be changed by adding or removing them as required (Figure 3). In addition to the default Ratepayer recipient any Consumers recorded for the Rates Assessment can be manually added via the dialog that appears when clicking on one of the Add buttons:

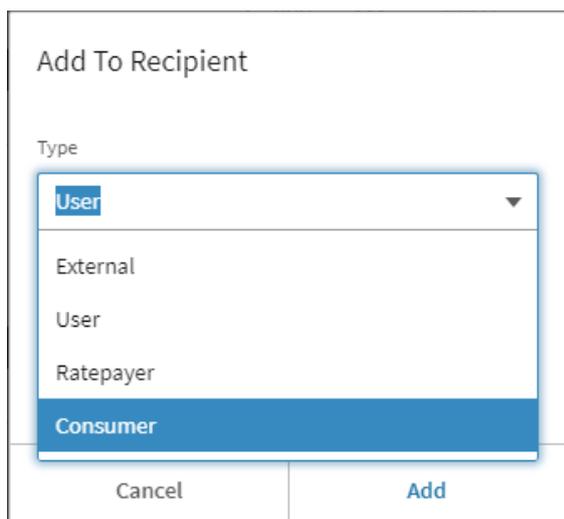


Figure 3

For different business objects the default and secondary names that are available are listed in the following table:

BUSINESS OBJECT	DEFAULT NAMES	SECONDARY NAMES
Booking	Customer	Contact

BUSINESS OBJECT	DEFAULT NAMES	SECONDARY NAMES
Booking Facility	Facility Owner	Facility Manager
Customer Request	Customer Name	
Animal	Animal Owner	
Application	Applicant	Builder
Debtor	Debtor	
Infringement	Offender	
Infringement Instalment Plan	Payment Plan Responsibility	
Inspection	Requestor	
License	Licensee	Proprietor
Property	Property Owner	Occupier
Rates Assessment	Ratepayer	Consumer
Trade Waste Assessment	Ratepayer	Generator

Business objects not listed have no names that make sense to be defaulted. These can still send attachments via email but always require the recipients to be added manually by the user.

More details about defining email templates are available below but first it is necessary to understand the Email Communication Type requirements that need to be in place on recipient names for them to default as To Recipients or be available to be added manually.

The *Name and Address Register >> Name and Address Parameters >> Communication Type Parameters* menu option defines the available Communication Types for Pathway names. This form has a Type Usage option where the Communication Type to use for E-Mail needs to be nominated for both Company and Personal names. These can be overridden to use a different Communication Type for a specific Role Type.

It is important to know that if the Communication Types to use for emailing are not defined that no names will be available as recipients. If these are defined but an individual name does not have an email address recorded for the nominated email Communication Type the name will also not be available to use as a recipient.

E-Mail Templates can be defined via System Administration >> Paperclip Attachments >> Attachment Entity Maintenance menu (Figure 4). One or more E-Mail Templates can be defined for each available business object, for example:

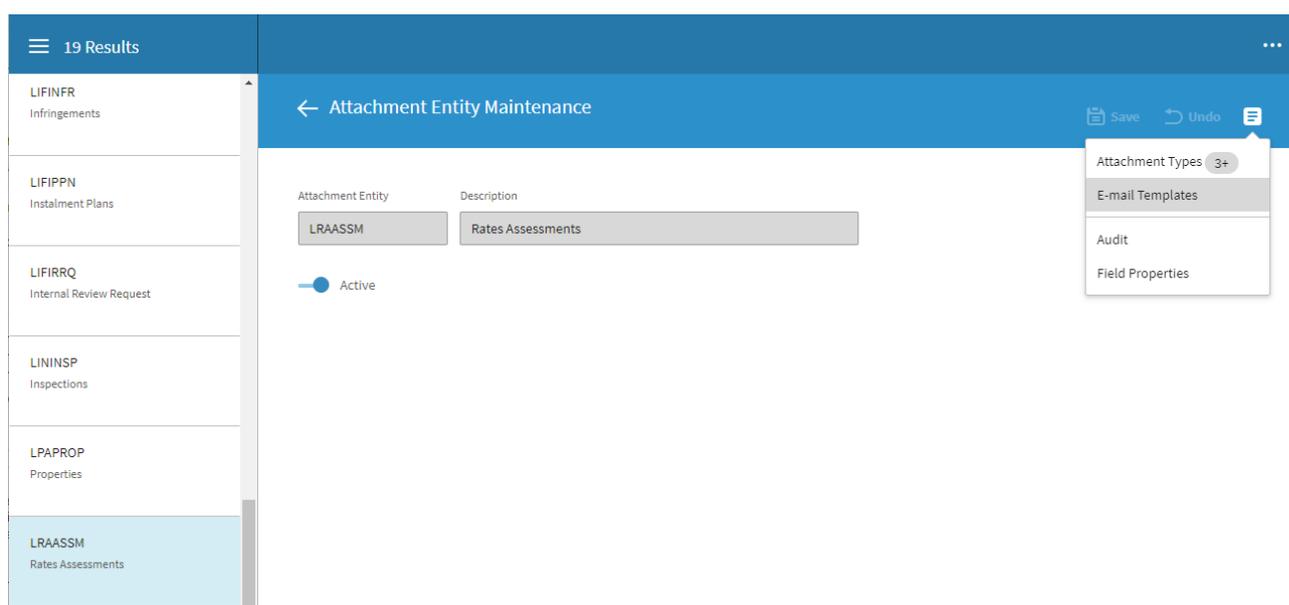


Figure 4

The email templates defined in the E-Mail Templates option against each business object can be used for Paperclip Attachments of any Attachment Type for the business objects so should have more general content. To define a more specific E-Mail Template for a specific Attachment Type the Attachment Types option would be used.

When only one template is defined for a specific business object Attachment Type this will be the only email template available to the user to choose when sending attachments of this type. In this way an administrator can be confident users will always choose the correct template.

An example of this would be to have a specific email attachment for the Rates Assessment Rates Notice Attachment Type that has an E-Mail Template with content relevant to the re-issuing of Rate Notices.

The E-Mail Templates form has a Default button added to make it easier to create HTML email templates (Figure 5). The Default E-Mail Template has a sample E-Mail Template preconfigured with an image embedded, headings and a footer included. Figure 6 shows a Preview of the Default.

The screenshot shows a web application interface for 'E-mail Template Maintenance'. The form is displayed in a modal window titled 'Make a selection'. The form fields are as follows:

- E-mail Template Code:** LRAASMTPL
- Description:** Rates Assessment Email
- From:** User (dropdown menu)
- E-mail Display Name:** (empty text field)
- E-mail Address:** (empty text field)
- Try SMTP:** (radio button, currently selected)
- Subject:** Rates Assessment Email for {{ MERGEFIELD: assmnumber }} {{{ MERGEFIELD: assmcheck }}} (text field)
- Message:** HTML Body (selected tab)
- HTML Preview:** (empty text field)
- Default:** (button at the bottom right)

Figure 5

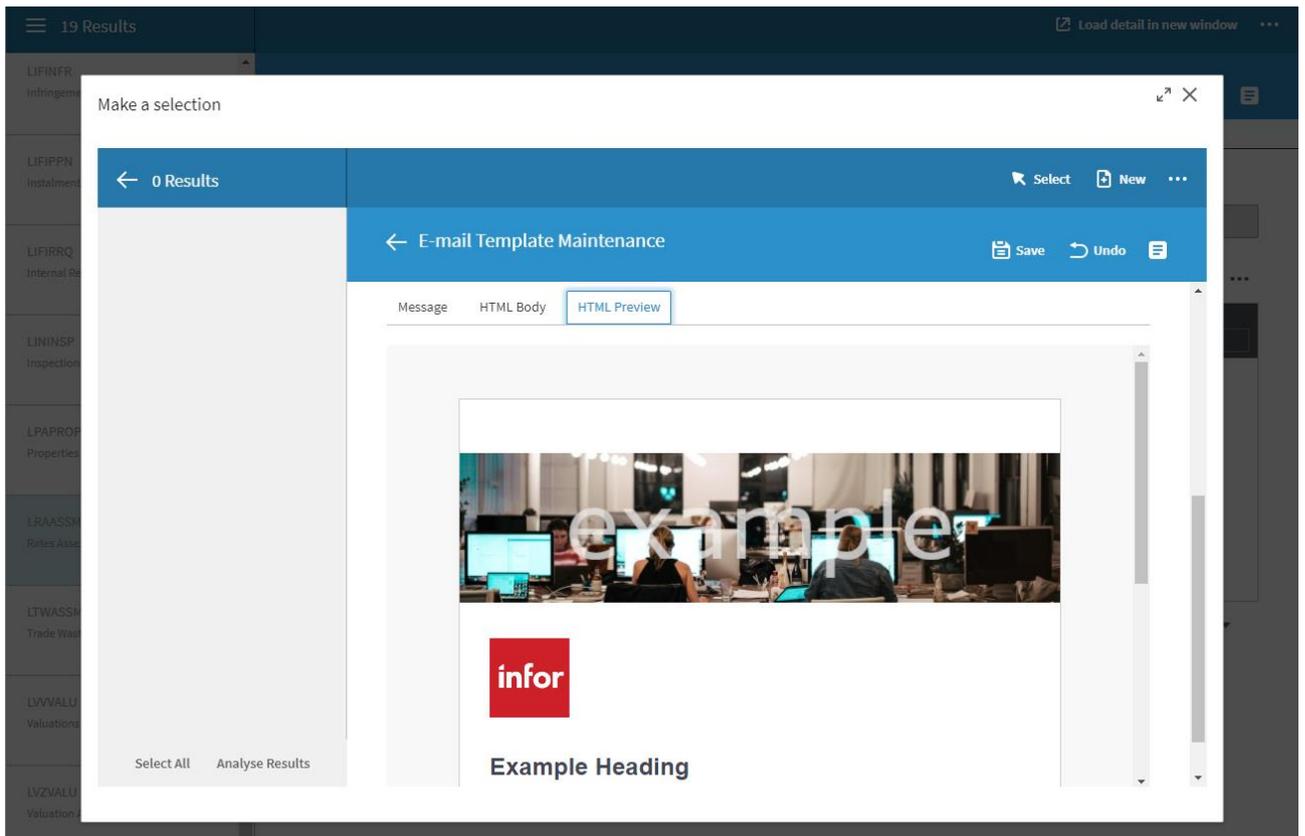


Figure 6

The E-Mail Template form has right click context menus available to add tokens that can substitute content from the applicable business object to customise the email content. For Paperclip Attachment email templates, the tokens available are any field that is in the database for the business object table. Figure 7 shows the tokens available in the Rates Assessment template:

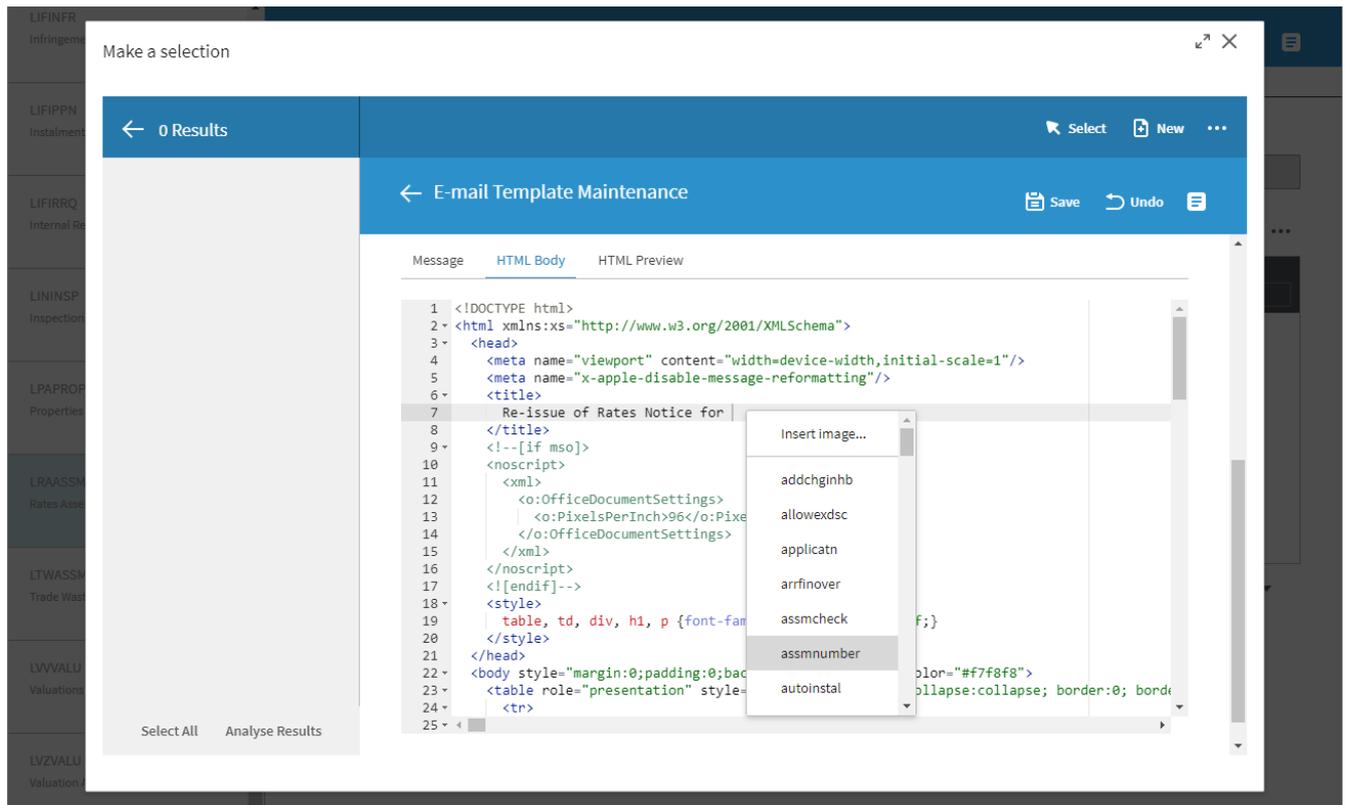


Figure 7

It is recommended any images that are embedded into an email template are not larger than 200KB for more prompt delivery of the email. Large images can adversely affect email delivery processing and performance.

In addition to the database tokens, it is possible to create SQL substitution tokens in the same way as Pathway Generic External System Options. These can source data from other related database tables. Details of how to define one of these are included at the end of these notes.

A Preview button is shown (Figure 8) once an email template has been selected, which allows the user to preview the email subject, content, and attachment/s of the email about to be sent.

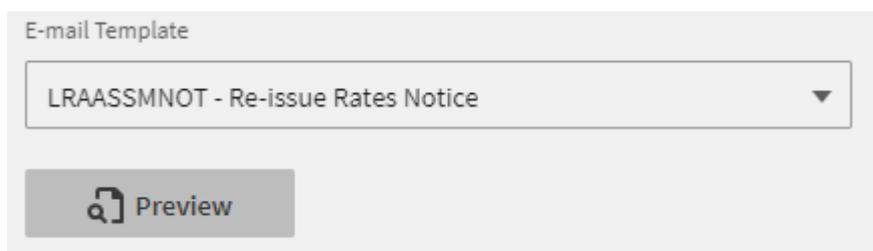


Figure 8

When Preview is activated (Figure 9) for our re-issue of a Rates Notice example it will look something like this:

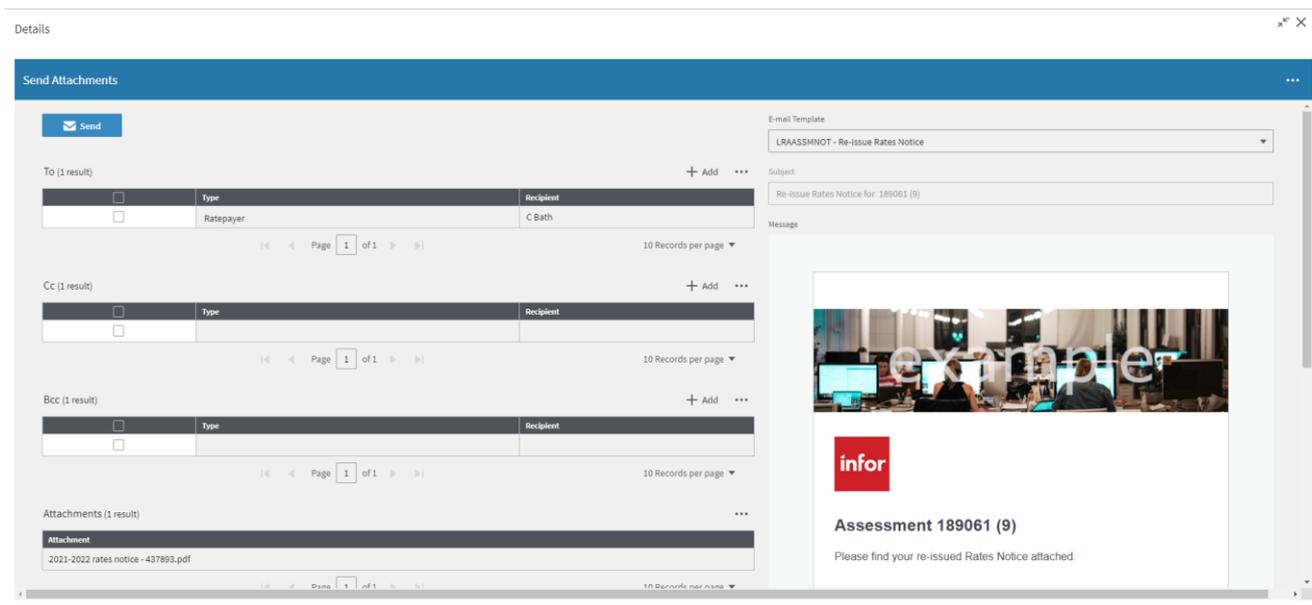


Figure 9

Click on the Send button to send the email. Use of the Preview feature is optional, the email can be sent without performing a Preview.

The Attachment Maintenance form has a new E-Mail History option (Figure 10) to display all the emails that have been sent for that Paperclip Attachment:

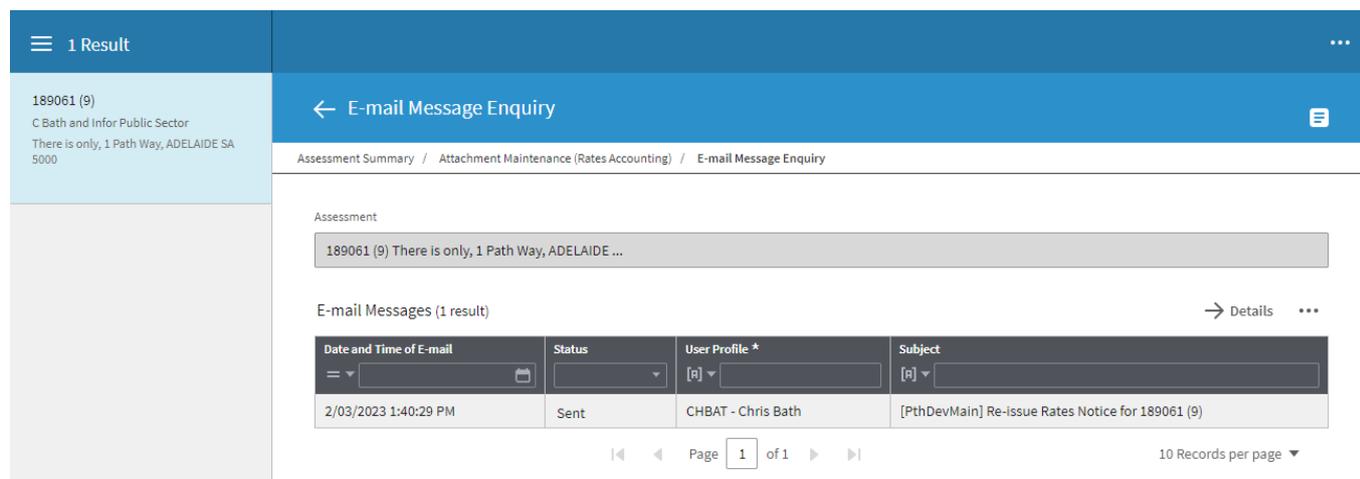


Figure 10

The details of these can be displayed using the Details button (Figure 10).

SQL Substitution Tokens

As mentioned previously, it is possible to create SQL substitution tokens in the same way as Pathway Generic External System Options which can source data from other related database tables via an appropriate SQL statement.

The Primary Property Address is not available by default for inclusion in an email for an attachment on a Rates Assessment. Here is how you would go about creating the SQL Substitution Token to include this in an E-Mail Template.

Navigate to the System Administration >> SQL Processing >> SQL Script Search Profile and create a new SQL statement that includes the primary key of the paperclip attachment entity (for a Rates Assessment the entity is LRAASSM, and the primary key field is TPKLRAASSM), Figure 11.

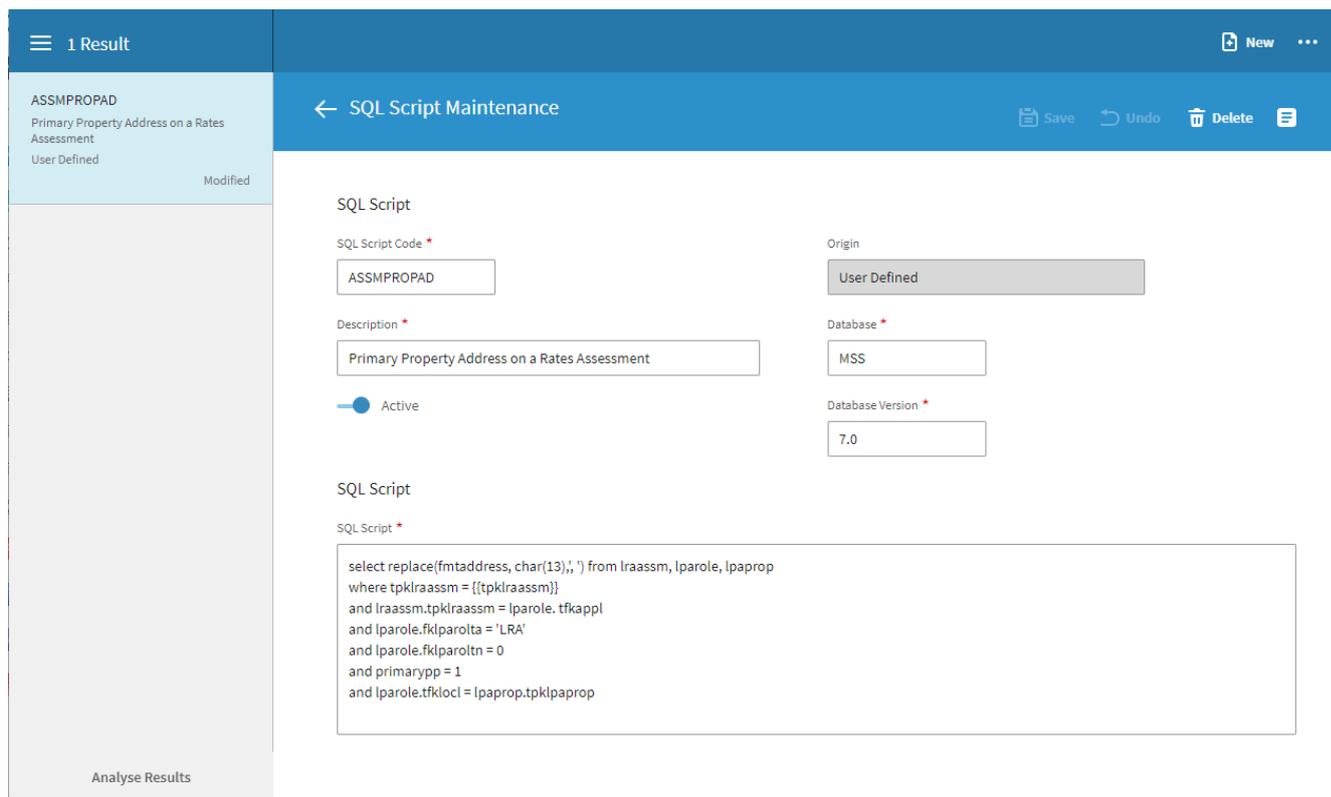


Figure 11

The important thing that makes this SQL statement available to use as a SQL Substitution Token is the inclusion of a token in the SQL script to substitute the primary key value. In this example it is "{{tpklraassm}}" for our Rates Assessment token:

```
select replace(fmtaddress, char(13),', ' ) from lraassm, lparole, lpaprop
where tpklraassm = {{tpklraassm}}
and lraassm.tpklraassm = lparole. tfkapp1
and lparole.fklparolta = 'LRA'
and lparole.fklparoltn = 0
and primarypp = 1
and lparole.tfklocl = lpaprop.tpklpaprop
```

Once this SQL statement is defined it automatically becomes available via the paperclip attachment context menu on the E-Mail Template maintenance form using the SQL Script Code value to identify the required SQL statement (Figure 12):

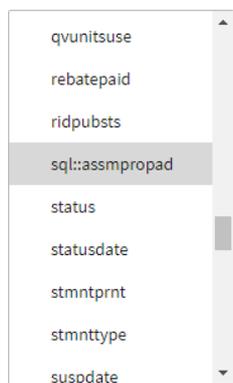


Figure 12

It is possible to define the SQL Substitution Tokens you need yourself or consider engaging Infor Consulting for assistance.

Time Picker

Incident: TOOW 16639588 UX Client	Work Item: 58949 KB:	Fix: ERS:
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The time picker control now matches the same autocomplete behaviour of the date picker and allows a partial entry to be converted into a valid value. This follows the same logic that was used within the smart client so that the hour is entered as a 24-hour value and then that is converted to a time value.

Example:

Enter 14 for the control to complete the value as 2:00 PM.

IDS Enterprise

Incident: UX Client	Work Item: 59131 KB:	Fix: ERS:
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UX DESIGN

The Enterprise Components for Infor Design System, controls within Pathway UX, have been upgraded to version 4.80.0. This contains various fixes and enhancements to the controls.

Token Expiry Message

Incident: TOOW 16911074 UX Client	Work Item: 59757 KB:	Fix: 03107743 ERS:
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UX FORMS LEFT OPEN

Previously, when UX forms were left open for extended periods (over four hours), errors were displayed that were very technical. A standard user-friendly message of **This page has expired, reload this page to continue** is now displayed, so that the user knows what to do to continue.

Full Width Layout

Incident: UX Client	Work Item: 59976 KB:	Fix: ERS: 91919
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The following forms have been altered so that they display using the full width of the screen to better display the data-grids.

- CNAG1012 - Default Address Maintenance
- LPAG0042 - Property Names Maintenance
- LRAG1040 - Names Maintenance
- LVLG1062 - Rental Assessment Maintenance

System Administration >> System Parameters >> ION Parameters

Incident: BALK 16841112 UX Client	Work Item: 60136 KB:	Fix: ERS:
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NOUN EXCLUSION MAINTENANCE

The Noun Exclusion facility provides a mechanism to selectively exclude noun instance(s) from an outbound Pathway BOD.

Noun Exclusion Query rows can be specified for a:

- parent level noun such as Sync.PathwayApplication
- child level noun such as Sync.PathwayApplication/PathwayProperty
- grandchild level noun such as Sync.PathwayApplication/PathwayProperty/ContactMaster

If a parent level Noun Exclusion Query returns a result of 'exclude' then no outbound from Pathway BOD will be produced for the parent noun instance.

If a child or grandchild Noun Exclusion Query returns a result of 'exclude' then the outbound from Pathway BOD will be produced but without the excluded child/grandchild noun instance(s).

The Noun Exclusion Query rows are definable SQL 'select' statements that support substitution tokens for the database columns within the lowest level noun table.

Example substitution tokens and noun levels:

- {{tpklapapl}} for the Sync.PathwayApplication parent noun
- {{tpklpaprop}} for the Sync.PathwayApplication/PathwayProperty child noun
- {{tpkcnaidty}} for the Sync.PathwayApplication/PathwayProperty/ContactMaster grandchild noun

A Noun Exclusion Query must contain a SQL select statement that returns a single result of 'exclude' when the noun instance is to be excluded.

Parent level noun exclusion example

Requirement: Exclude the entire Sync.PathwayApplication BOD when the PathwayApplication noun instance is not in the 'DEVT' Application Type.

Implementation:

Sync.PathwayApplication Exclusion Query of:

```
select top(1) 'exclude' from lapappl t1
  inner join lapapno t2 on t1.tpklapapl=t2.tfklapappl
  inner join lapttype t3 on t2.tfklaptype=t3.tpklaptype
 where t1.tpklapapl={{tpklapapl}} and t3.aptype!='DEVT'
```

Child level noun exclusion example

Requirement: Exclude all PathwayProperty noun instances from an outbound from Pathway Sync.PathwayApplication BOD when the PathwayProperty noun instance(s) are Historic.

Implementation:

Sync.PathwayApplication/PathwayProperty Exclusion Query of:

```
select 'exclude' from lpaprop where tpklpaprop={{tpklpaprop}} and status='H'
```

ION Parameters

Incident:	Work Item: 60492	Fix: 03107761
UX Client	KB:	ERS: 96196

ION PARAMETER MAINTENANCE

The PathwayRatesAssessment Business Object Definition and associated BODs have been extended to include Non-Rateable Reason and Rebate Group elements.

The <NonRateableReasonCode ...> and <RebateGroup ...> elements have been added to the outbound from Pathway, (Sync.PathwayRatesAssessment and Acknowledge.PathwayRatesAssessment), BODs.

Entities and fields have been added to the PathwayRatesAssessment, (LRAASSM), Business Object Definition to enable create/delete/update events to be specified on the database tables and/or columns that are used to populate the additional elements.

There is no modification to the inbound to Pathway, (Process.PathwayRatesAssessment), BOD.

The ION system will not be aware of the modifications to the PathwayRatesAssessment noun schema definition until the Object Schemas are published in a standard Pathway release.

Core Financials Interface

Enhancements

Financial Account Allocation Report

Incident: UX Client	Work Item: 58245 KB:	Fix: ERS:
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FINANCIAL ACCOUNT ALLOCATION REPORT CONTROL

An enhancement has been made to the reporting entity (CRPFI07) written by this report to now have the following additional fields:

- SRCENTY - The name of the table for which the Account was sourced.
- SRCENTYTPK - The technical primary key value of the row of the table for which the Account was sourced.

NOTE: The Rates Accounting (LRA) and Debtors (LDR) modules report cases where an account has not been overridden and therefore has defaulted from a higher level. In these situations, the new fields reflect the higher level table and key.

Customer Service

Enhancements

Customer Service History Log Enhancement

Incident: TOOW 14819866 UX and Smart Clients	Work Item: 56596 KB:	Fix: ERS: 60059
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HISTORY LOG ACTION MAINTENANCE

A new History Log Action is now available in the *Customer Service >> Parameters >> History Log Action Parameters* menu option. The data code is MANPUB, and the default description is Data Publisher. This is not active by default, if you want to make use of it to have a History Log created whenever a user performs manual publishing of data to the Data Publisher / GENCON EDMS via the option on the Customer Service Summary form you will need to make this new action active. After doing that you also need to clear caches from the My Account >> Support page. The clear caches is only required once and will take effect for all Pathway users.

Rates Maintenance

Incident: UX Client	Work Item: 57206 KB:	Fix: ERS: 79958
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ADD NEW CUSTOMER SERVICE REQUEST

An enhancement has been made to Rates Accounting >> Assessment Maintenance - Options - Customer Service Links to enable the creation of new Customer Requests from the Linked Requests form, using the new Add Request button.

ePathway System

Enhancements

ePathway Export

Incident: UX Client	Work Item: 58884 KB:	Fix: ERS:
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HOLD EXPORT QUEUE FOR PAYMENTS ONLY

The existing ability to place a daily hold on records being exported to Pathway has been extended to allow all records other than Payments to continue processing. If the new System Setting Pathway.HoldExportQueuePaymentsOnly is switched ON, all non-payment export records will still be processed even during the HOLD period.

System

Incident: UX Client	Work Item: 59075 KB:	Fix: ERS: 83399
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EPATHWAY LOG FILE ROLLOVER

The .\tmp\ePathway.log file will now be automatically rolled over each day in the same way as the .\tmp\ApplicationServer.log file. The rollover involves renaming the .\tmp\ePathway.log and .\tmp\ApplicationServer.log files to .\tmp\ePathway.yyyymmdd.log and .\tmp\ApplicationServer.yyyymmdd.log between 12 AM and 4 AM each day, provided they are not locked.

ePathway Logon

Incident: UX Client	Work Item: 59476 KB:	Fix: ERS: 91732
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TWO FACTOR AUTHENTICATION FOR EPATHWAY AND CITYWATCH

Two Factor Authentication (2FA) has been implemented for ePathway and CityWatch. When switched on, registered users will be required to enter a one-time passcode from an Authenticator app in addition to the regular password.

Configuration

There are two new System Settings that control 2FA in ePathway and CityWatch (Figure 1):

Login.TwoFactorAuthentication	Allow ePathway users to sign in with Two Factor Authenticaion.	<input checked="" type="checkbox"/>
Login.TwoFactorAuthenticationIdentifier	The value used by the Authenticator app to identify the account. Typically this will be the Council Name.	<input type="text" value="Infor Council"/>

Figure 1

Switching the Login.TwoFactorAuthentication setting on will allow (not force) registered users to configure 2FA on their account.

The Login.TwoFactorAuthenticationIdentifier setting is the value that will appear on the registered user's Authenticator app to identify the account Figure 2.

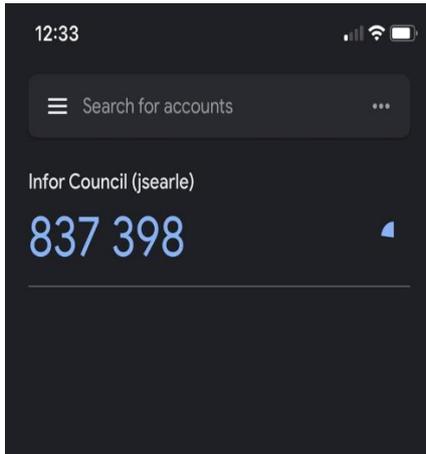


Figure 2

When a registered user has configured their account for 2FA the only way for them to reset is by the Login Assistance page (currently only used for Forgotten Passwords). For this reason, it may be beneficial to update Instructions via ADMIN >> Layout >> Page Layout >> ePathway User Registration >> LOGINHELP >> Pages >> Instructions to inform registered users (Figure 3):

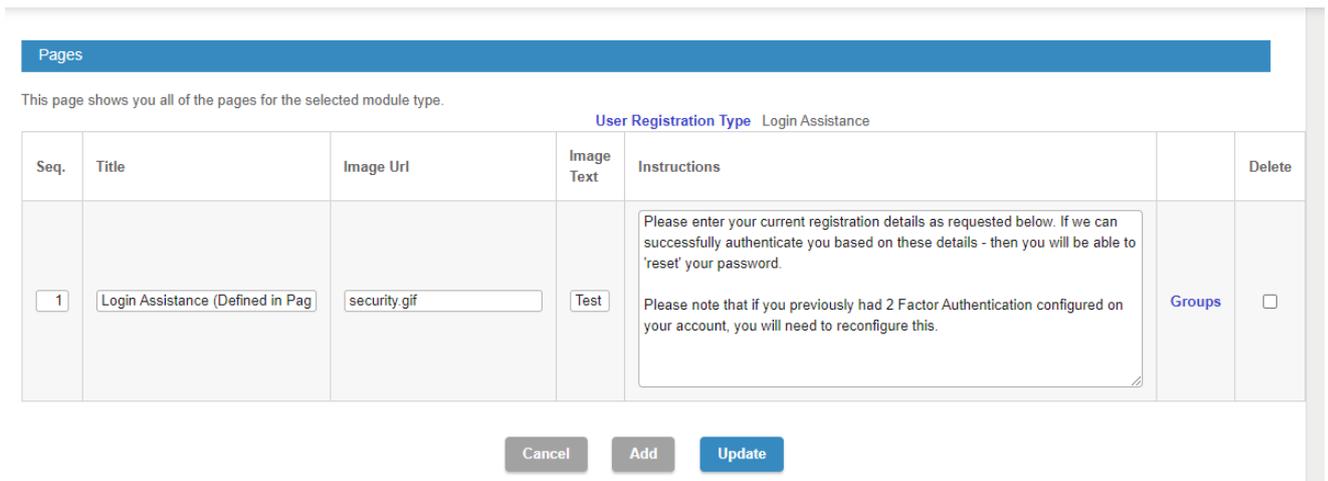


Figure 3

Additional System Text has been added to allow customisation of the wording on buttons and labels: ADMIN >> Layout >> Text >>

FIELD NAME	SAMPLE TEXT
Login.Assistance2FA	Lost your 2FA Code?
Login.AuthenticatorCode	Authenticator Code
Login.InvalidUserNamePassword2FA	Invalid Username, Password or Two Factor Authentication Code
Login.ValidateAndSave	Validate and Save
MyHome.Configure2FA	Configure 2FA
MyHome.Remove2FA	Remove 2FA
TwoFactorAuthentication.Failure	'Invalid Code. Please try entering the new code displayed on your Authenticator app and then click on the 'Validate and Save' button again.'

FIELD NAME	SAMPLE TEXT
TwoFactorAuthentication.Instructions1	Step 1: If you do not already have an Authenticator app (Google Authenticator, Microsoft Authenticator, etc) please download and install one on your mobile device. Step 2: Link your device to your account by opening your Authenticator app and clicking the + sign at the bottom of the app. You should be able to use either the QR Code OR the Secret code below to do this.
TwoFactorAuthentication.Instructions2	Step 3: Enter the 6 digit code displayed on your Authenticator app and then click on the 'Validate and Save' button to finalise the process.
TwoFactorAuthentication.Success	Code Successfully Verified. Your user is now configured to use Two Factor Authentication.
TwoFactorAuthentication.Title	Two Factor Authentication Configuration

Using Two Factor Authentication

For a registered user to configure 2FA on their account they will need to log on to their MyHome page and click on the Configure 2FA button (Figure 4):



Figure 4

This will take them to the Two Factor Authentication Configuration form (Figure 5) where they can scan a QR Code or enter a secret key using their preferred Authenticator app. All Instructional text on this page is configurable in System Text.

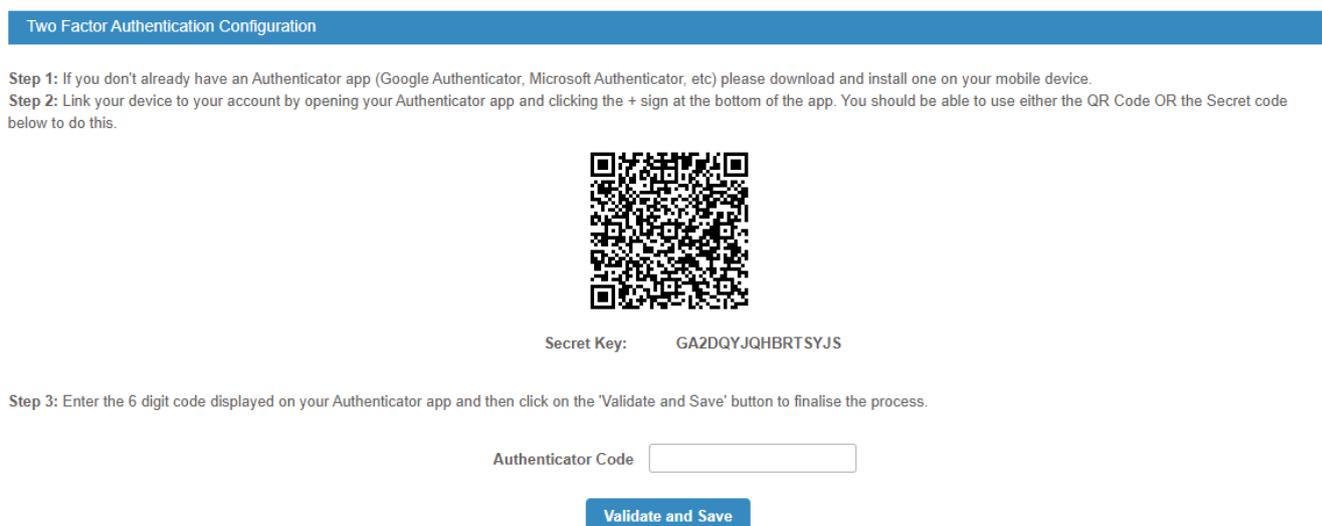


Figure 5

Enter the code displayed on the Authenticator app and clicking on the "Validate and Save" button will complete the process.

After successfully completing this step, the user will subsequently be required to enter a one-time code each time they log in (Figure 6):

Authenticator Code

[Lost your 2FA Code?](#) [Sign in](#)

Figure 6

In the case of a registered user losing access to their Authenticator app, the only way for them to clear this code is via the Lost your 2FA Code? button which will reset the 2FA feature as well as the password.

A registered user can remove 2FA from their account via the Remove 2FA button (Figure 7) on the MyHome page:

Jon Searle		Rates	
Postal address 1 6, 32 Alinjara Dr, Tugun QLD 4224	Ratepayer	188539 (5) - Current 3 Greenhill Road, WAYVILLE SA 5034 (Rates)	⊞ ⋮
Email address jon.searle@infor.com	Ratepayer	188538 (7) - Current 3 Greenhill Road, WAYVILLE SA 5034 (Rates)	⊞ ⋮
Communication preference Email	Ratepayer	215309 (0) - Current Farm 1A St Kilda Avenue, ST KILDA VIC 3333 (Rates)	⊞ ⋮
Edit contact details		Load more	
Remove 2FA			
Refresh			
		Debtors	
	Debtor	726 (4) (Current) Default. Monthly	⊞ ⋮

Figure 7

NOTE: It is possible for the multiple people to access the same 2FA account (for example where two or more people need to access the Administrator account). The simplest method would be to copy the Secret Key (which displays below the QR code, Figure 5) and distribute this to anyone who needs access. Then use Sign in manually option on the Authenticator app, instead of scanning the QR code.

CityWatch

Although configuring 2FA is all done in ePathway, logging into CityWatch will still require the user to enter a 2FA Code, (Figure 8):

 Login

[Login](#)

[Register](#)

[Lost 2FA Code](#)

Figure 8

ePathway Audit Log

Incident:
UX Client

Work Item: 59691
KB:

Fix:
ERS:

EPATHWAY AUDIT LOG KEYWORD SEARCH

The ePathway Audit Log Keyword search has been expanded to encompass the Description and User Name fields as well as the original Key Word column. The Audit Log rows will be filtered by the nominated Key Word appearing anywhere within the fields.

Audit Log

Please enter the date range and select event type to search for your required audit logs.

Date

From

To

27/10/2022 00:00:00

27/10/2022 23:59:59

Event Type

All

Key Word

please

Search

Event Type	Description	Key Word	User Name	IP Address	Browser	Java script	Date	HTTP Headers	Processing
	PLEASE NOTE THAT the Export to Pathway queue has been held for 45 minutes 9 seconds, there are No entries on the queue, it will restart itself at 4:15 PM. Only holding Payments flag is set to True	DMIMP-4-AUSYVWLG10V1	INFOR\mnolan				27/10/2022 16:00:15		
	PLEASE NOTE THAT the Export to Pathway queue has been held for 30 minutes 6 seconds, there are No entries on the queue, it will restart itself at 4:15 PM. Only holding Payments flag is set to True	DMIMP-4-AUSYVWLG10V1	INFOR\mnolan				27/10/2022 15:45:12		
	PLEASE NOTE THAT the Export to Pathway queue has been held for 15 minutes 3 seconds, there are No entries on the queue, it will restart itself at 4:15 PM. Only holding Payments flag is set to True	DMIMP-4-AUSYVWLG10V1	INFOR\mnolan				27/10/2022 15:30:08		

Page 1 of 1

ePathway General Enquiry

Enhancements

ePathway General Enquiry Lists

Incident: UX Client	Work Item: 56063 KB:	Fix: ERS:
------------------------	-------------------------	--------------

SORTABLE HEADER LINKS

It was not obvious that some of the header links in the General Enquiry Summary List View were sortable. An up/down chevron icon has now been added to sortable fields to make it clearer.

ePathway General Enquiry - Customer Requests

Incident: UX Client	Work Item: 57081 KB:	Fix: ERS:
------------------------	-------------------------	--------------

1. EPATHWAY CUSTOMER REQUESTS GENERAL ENQUIRY ENHANCEMENTS OVERVIEW

It is now possible to use the ePathway General Enquiry to perform enquiries upon Customer Requests. As per all General Enquiry modules, this requires the establishment of Enquiry Lists to define each type of enquiry, which users (Customers) and groups (Customer Types) can access them, and what data is exposed in each case as defined by the Page Layout.

The following search functions are available:

- Address Search
- Formatted Number Search (Request Number)
- Date Search (Date Received)
- Auto Search (where the criteria entry is bypassed and defined by the Enquiry List)

Data available to be exposed (see full list in section 3.2.1 of this document):

- Request core details
- Linked Modules
- Questionnaires
- Name Roles
- Parent/Child Associated Requests
- Primary/Secondary Requests
- Workflow Tasks
- References
- Notes
- Other General Enquiry Links

2. GENERAL ENQUIRY USER EXPERIENCE

The Customer Request General Enquiry conforms to the features of other ePathway General Enquiry modules. As such, anyone familiar with ePathway enquiry modules will find the user experience very similar. This section describes the navigation within the new module.

2.1. ENQUIRY ACCESS

The new ePathway Customer Requests Enquiry option will be accessible via the existing ePathway General Enquiry dropdown menu (Figure 1) or via the External Request Broker (ERB). Section 3.3 provides information on how to setup an ERB call.

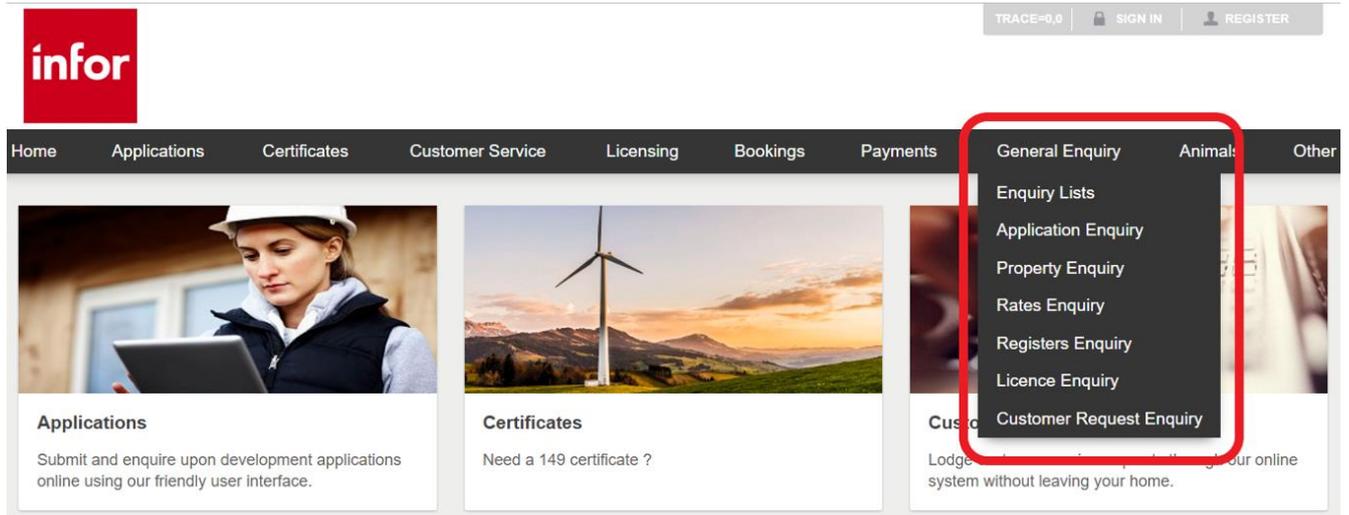


Figure 1 - General Enquiry Menu Options

A new 'Customer Request Enquiry' menu option will be available for authorised ePathway Users (Customers). The same permissions will also determine Enquiry List access for each Customer. This allows council to control which Customers (and Customer Types) have access to what information. For example, a Customer belonging to the "Councillors" Customer Type can be provided exclusive access to requests lodged by Councillors. Alternately, public users may be provided access to Enquiry Lists containing information intended for the public domain. Section 3.1.2 provides details on this configuration.

Available to Public

Only Customer Request records flagged as 'Available to Public' will be visible to public users. Conversely, ePathway registered users (e.g., Councillors, referral agencies etc.) will be able to view all Customer Requests irrespective of the 'Available to Public' flag since it is expected that the Enquiry List definition will impose the appropriate level of authority and filtering.

Stakeholder Privileges

Enquiry List data may be hidden for secure (stakeholder only) visibility. This feature is particularly useful for sensitive data. For example, this could be configured to ensure that only the 'Requestor' is allowed to view the Request Notes. Refer to Section 3.1.1 for details on this configuration.

Figure 2 displays examples of Customer Request Enquiry Lists. Each Enquiry List may be configured to contain data pertaining to one or many Customer Request Types. For example, Health and Food Complaints could include Request Types such as 'Public Toilet Hygiene' and 'Food Business Complaints'. In Figure 2 there is the option to see 'Lost Animal Enquiries'.

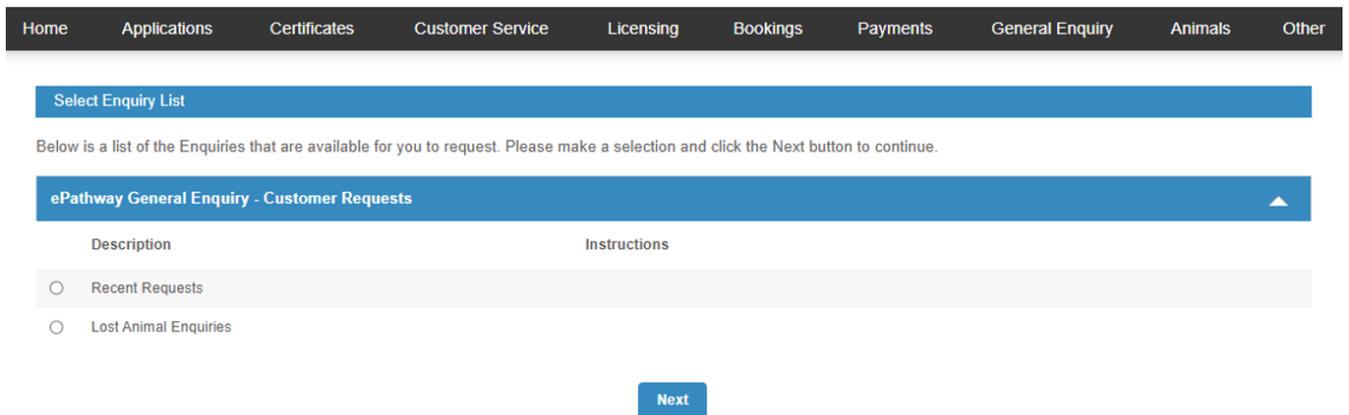


Figure 2 - Select Customer Request Enquiry (as Public User)

In Figure 3 a council officer is signed in as an ePathway registered user. The Enquiry Lists are defined with their information needs in mind, including a list which acts as a report to display all active Councillor Requests for the last 90 days. All text contained within this screen can be customised.

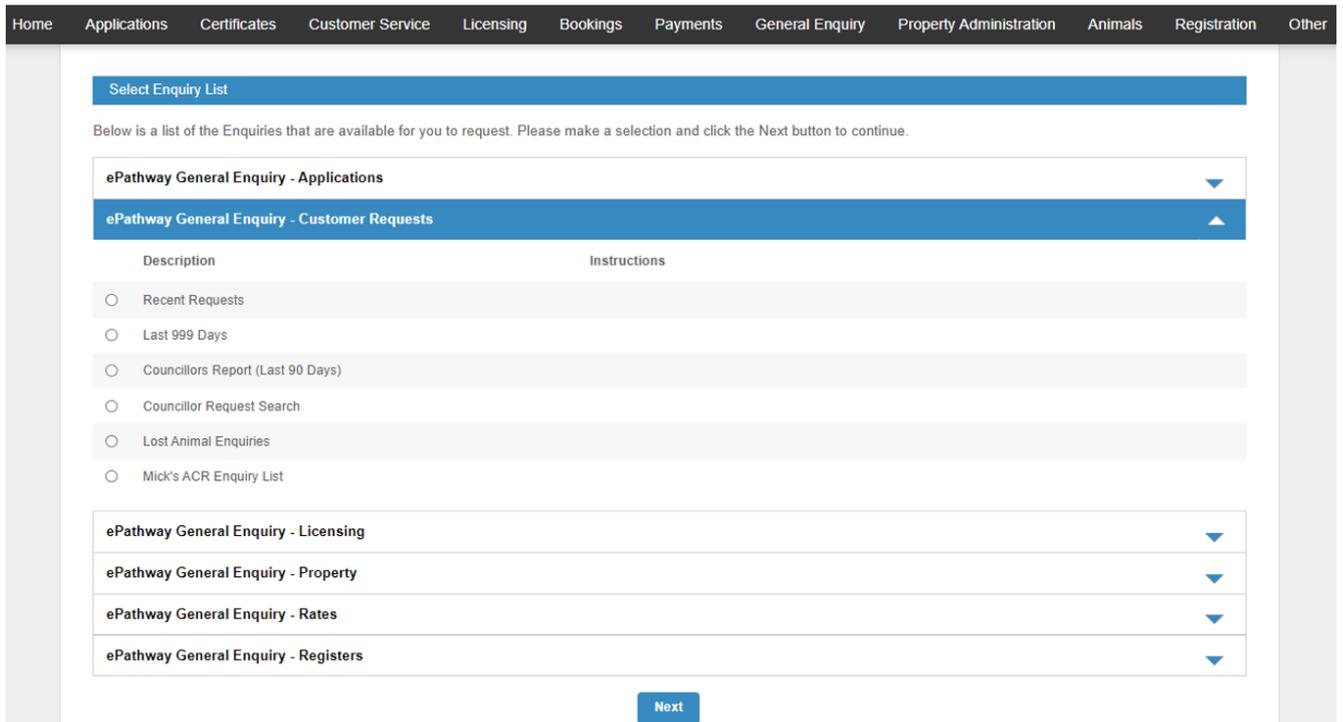


Figure 3 - Select Enquiry List (as Registered User)

2.2. CUSTOMER SEARCH

Search options are configurable and specific search filters provide Customers with the ability to target their searches. As per existing General Enquiry Modules, the search filters may be presented to the Customer up-front ('Display Search Page before List') or in-line (bypass the Search Page).

The following search options are available:

- Address Search
- Formatted Number Search (Request Number)
- Date Search (Date Received)
- Auto Search (where the criteria entry is bypassed, and defined by the Enquiry List)

Customers may use the 'Select an alternate Enquiry List' option to switch between different Enquiry Lists if available to that Customer. Further information on this configuration is outlined in Section 3 of this document.

An example (up-front) Enquiry Search Page (Figure 4):

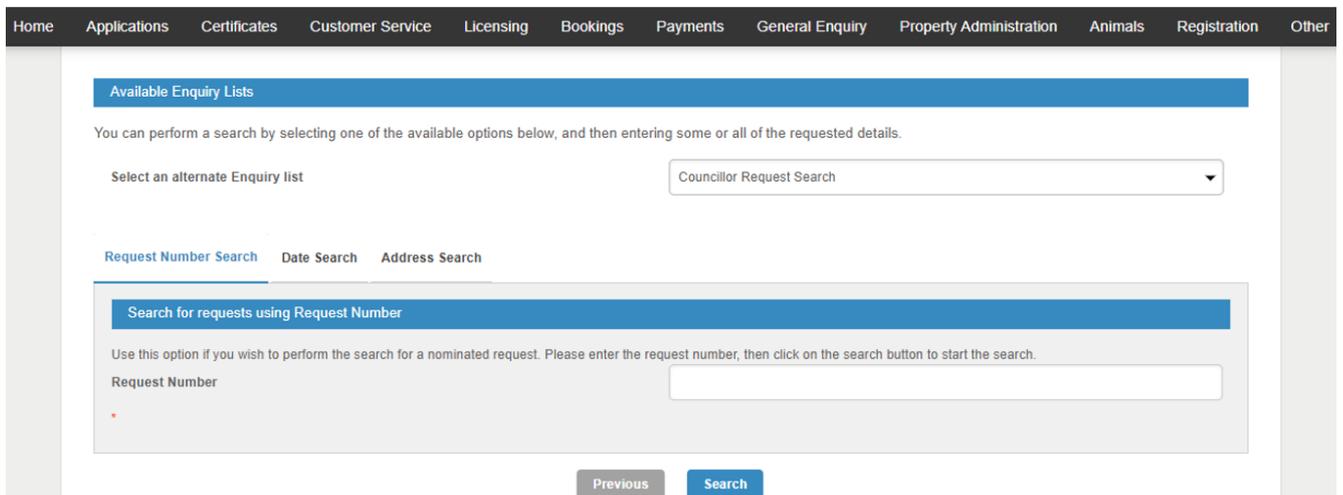


Figure 4 - General Enquiry Search

Note that all instructions and labels contained within this screen may be customised. See Sections 3.2.3 and 3.2.4 of this document.

The Customer may use any of the search tabs and enter the relevant filter information. Entering criteria and clicking the Search button will take the Customer to the General Enquiry Summary View.

2.3. SUMMARY VIEW

2.3.1. SUMMARY VIEW RESULTS

The General Enquiry Summary View displays a list of records that match both the Enquiry Lists definition as well as any filters applied by the Customer. The data columns in the Summary View are configurable and intended to be enough information for a Customer to determine whether the Customer Requests are relevant to them (Figure 5).

All column headers, instructions and label text contained within this screen can be customised.

The Summary View contains inline search filters as per the optional up-front Search Page described in Section 3.2.3 of this document. Customers may use the dropdown to switch between Enquiry Lists and tabs to switch between filter types.

In most instances the column header labels are clickable hyperlinks allowing a Customer to sort (ascending or descending) the data contained within the grid. In Figure 5 Customer Requests are sorted by Priority. Initially, the records will be sorted in descending Request Number order unless an alternative order is chosen for the Enquiry List.

The Summary View will initially display between 1 and 10 records depending on a pre-configured ePathway System Parameter setting. When the maximum number of records per page is exceeded, paging will be invoked.

The first column will be rendered as a hyperlink. In Figure 5 the Councillor field shows as a hyperlink. Clicking on the hyperlink will display the details of the Customer Request, the General Enquiry Detail View. For further information on this refer to Section 2.4 in this document.

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

Councillors Report (Last 90 Days)

Listed below are the results for the enquiry that you requested. If available, you can click on the first column to display the details for that entry.

Available Enquiry Lists Download

Select an alternate Enquiry list
Councillors Report (Last 90 Days)

Councillor	Request Type	Description	Date Received	Date Responded	Request Status	Priority	Request Number
Xiang Liu (XILIU)	All module links attached		28/10/2022	28/10/2022	Actioned	2	197794
Xiang Liu (XILIU)	All module links attached		1/12/2022	1/12/2022	Actioned	2	197997
Xiang Liu (XILIU)	Mick's Request Type	** Modify Me - Oh, yes, you know you want to do it! **	28/10/2022		Allocated	3	197793
Jo Aitken	Dog Attack	Given Name: nick Surname: gabb Contact Customer: No Request Location: 13 Greenhill Road, WAYVILLE SA 5034 Request Latitude: -34.9424505 Request Longitude: 138.5861744 Visible to Public: No Property Id: 1210054 Questionnaire: 1) Date of Attack Answer: 2022-11-15T00:00:00 2) Are you injured (Please seek medical advice if yes) Answer: Yes 3) Is the Dog registered Answer: Yes 4) Dog Disc Number Answer: 12345 5) Short de...	15/11/2022		Unactioned	3	197905
Jo Aitken	Dog Attack	Surname : gabb Given Names : nick	15/11/2022		Unactioned	3	197906
Jo Aitken	Dog Attack	Given Name: test Surname: trest Contact Customer: No Request Location: 162373 stalink road, systematic 4505 Visible to Public: No Questionnaire: 1) Date of Attack Answer: 2) Are you injured (Please seek medical advice if yes) Answer: No 3) Is the Dog registered Answer: No 4) Dog Disc Number Answer: 5) Short description of dog Answer: 6) Detailed account of event Answer:	15/11/2022		Unactioned	3	197907
Jo Aitken	Dog Attack	Surname : Liet Given Names : Mick Mobile Phone : 34566754	16/11/2022		Unactioned	3	197914
Kelly Jamieson 2	Lost Dog	Surname : Liet Given Names : Mick	17/11/2022		New request	3	197922
Jo Aitken	Dog Attack	Surname : Liet Given Names : Mick	17/11/2022		Unactioned	3	197923
Ross Stephens	ePathway - Application Lodgement	New ePathway Application 1998/770/DA/0 has been lodged for 1 Liet Street, ADELAIDE SA 0891.	17/11/2022	17/11/2022	Actioned	3	197924

Page 1 of 3
1 2 3 ▶

Figure 5 - Enquiry Summary (List) View

2.3.2. SUMMARY VIEW DOWNLOAD TO CSV

The ability to download the rows displayed in the General Enquiry Summary View is a new feature available to all ePathway General Enquiries. It can be activated via a new ePathway system configuration parameters. This is done via ADMIN >> Configuration >> System Parameters - GeneralEnquiry.DisplayCsvDownload. It will download the data in CSV format (Comma Separated Values) which can then be opened in Excel or other associated applications.

When this feature is active a Download button is shown at the top-right of the results grid (Figure 5). Clicking the Download button will download the data to a file called “searchresults.csv” (Figure 6).

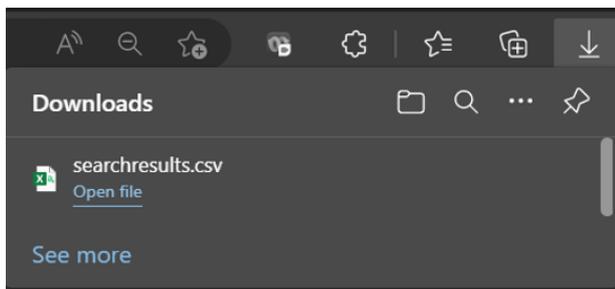


Figure 6 – Download button triggers download of “searchrestults.csv”

See Section 3.2.4 for the ePathway system settings and text codes that control the button label, file name and activation of this new feature.

Figure 7 shows the data from Figure 5 opened in Excel (with the cell alignment set to Top so we can see the First_Note field in its entirety).

1	Responsible_Officer	Request_Type	First_Note	Date_Received	Date_Responded	Request_Status	Priority	Request_Number
2	Xiang Liu (XILIU)	All module links attached		28/10/2022	28/10/2022	Actioned		2 197794
3	Xiang Liu (XILIU)	All module links attached		1/12/2022	1/12/2022	Actioned		2 197997
4	Xiang Liu (XILIU)	Mick's Request Type	** Modify Me - Oh, yes, you know you want to do it! **	28/10/2022		Allocated		3 197793
5	Jo Aitken	Dog Attack	Given Name: nick Surname: gabb Contact Customer: No Request Location: 13 Greenhill Road, WAYVILLE SA 5034 Request Latitude: -34.9424505	15/11/2022		Unactioned		3 197905
6	Jo Aitken	Dog Attack	Surname : gabb Given Names : nick	15/11/2022		Unactioned		3 197906
6	Jo Aitken	Dog Attack	Given Name: test Surname: trest Contact Customer: No Request Location: 162373 stalink road, systematic 4505 Visible to Public: No Questionnaire: 1) Date of Attack Answer: 2) Are you injured (Please seek medical advice if yes) Answer: No 3) Is the Dog registered Answer: No 4) Dog Disc Number	15/11/2022		Unactioned		3 197907

Figure 7 - Enquiry Summary (List) View Downloaded to CSV and opened in Excel

2.3.3. SUMMARY VIEW MAP VIEW

A Map View button is also available for Customers to view the property location pins (where relevant) on a Google Map.

NOTE: The Map View button will only be available if the Property Address field (internal fieldname as 'Formatted_Address') is included in the Summary View layout. The Property Address field is populated with the address of the first Property linked to each Request.

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

Recent Requests

Listed below are the results for the enquiry that you requested. If available, you can click on the first column to display the details for that entry.

Available Enquiry Lists

Select an alternate Enquiry list

Recent Requests

Summary

Choose a Request to enquire upon

Map View Download

Request Number	Request Type	Requestor Type	Property Address
197906	Dog Attack	ePathway Request	
197905	Dog Attack	Person in Council Area	13 Greenhill Road, WAYVILLE SA 5034
197794	All module links attached	Person in Council Area	
197793	Mick's Request Type	Person in Council Area	

Page 2 of 2

1 2

Figure 8 - Enquiry Summary (List) View with Map View button

Hover over the map pin to see the Request details and click on the Select hyperlink to access the General Enquiry Detail View for a particular Customer Request (Figure 9).

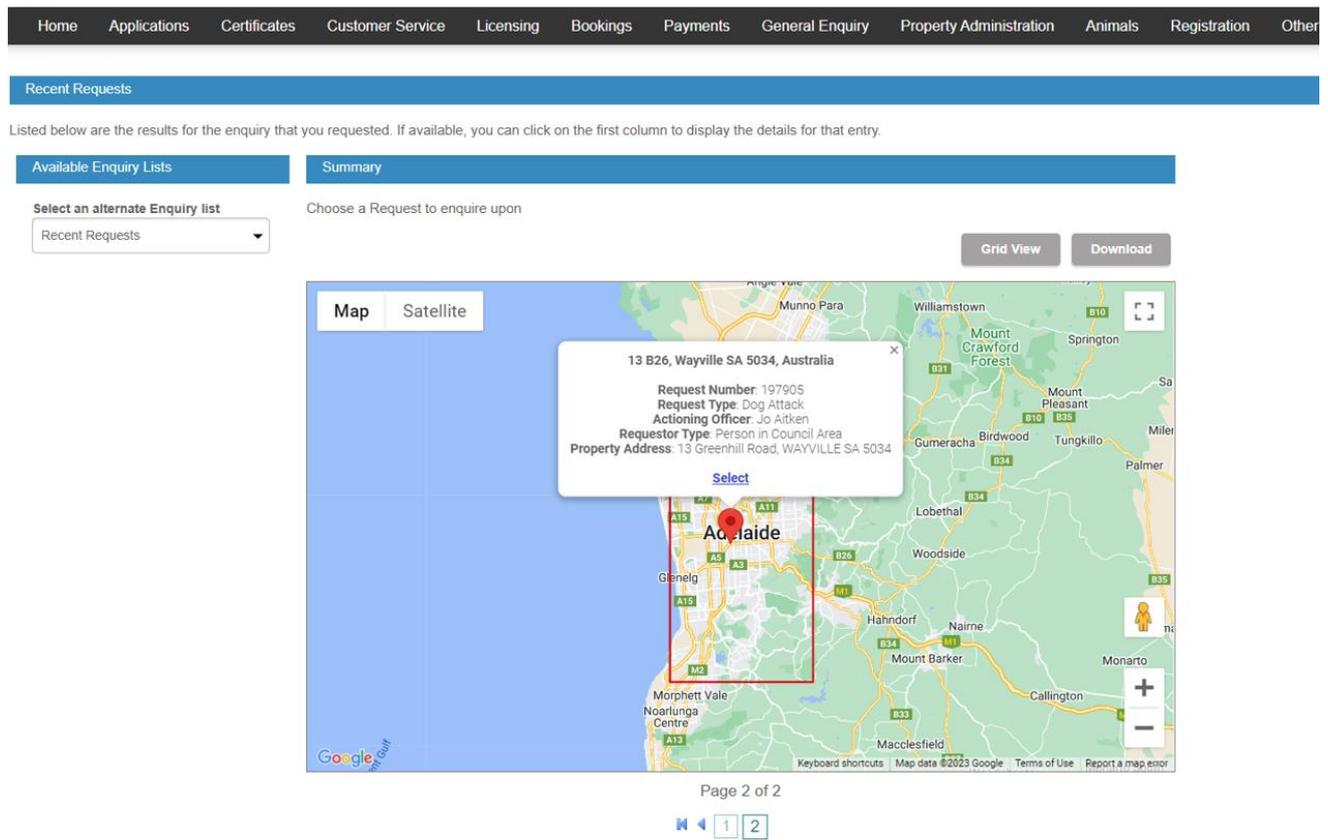


Figure 9 - Enquiry Map View

NOTE: If there are multiple properties linked to the Request, only the first property will be displayed on the map. If there are no Properties linked to the Request, no pin will be present for that Request.

2.4. DETAIL VIEW

The General Enquiry Detail View displays detailed information pertaining to the Customer Request record. The Detail View is highly configurable and effective in grouping relevant information and associated documentation (Figure 10).

Each of the data fields, labels and groupings on the Detail View are customizable. Notes, References, Workflow Tasks, Module Roles, and related data can be displayed. See section 3.2.1 in this document for a full list of available fields and groups.

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

Enquiry Detail View

Details

Request Number	197905
Request Type Code	DGATT
Request Type	Dog Attack
Request Status	Unactioned
Priority	3
Date Priority Last Modified	15/11/2022
Actioning Officer	Jo Aitken
Receiving Officer	Public Mobile User
Responsible Officer	Jo Aitken
Date Received	15/11/2022
Date Responded By	18/11/2022
Time Taken Numeric	0
Time Taken Units	Hours
Request Source	Mobile
Contact Type	External
Requestor Type	Person in Council Area
Available To Public	False

References

Reference Type Code	Reference Type	Reference Value
EPWGNNAME	ePathway Givennames	NICK
EPWSNAME	ePathway Surname	GABB

Modules

Module Type	Module Description	Date Added
Customer Name	Private Joe Public - public@xxx.com (e-mail address)	15/11/2022
Property	13 Greenhill Road, WAYVILLE SA 5034	15/11/2022

Name Roles

Name	Name Role Type	Address
Private Joe Public - public@xxx.com (e-mail address)	Customer Name	1B 52nd Street Toe, Aberfoyle Hills SA 5159

Questionnaires

Questionnaire Code	Questionnaire Description	Date Last Modified	User Identifier	
<input type="checkbox"/> TEST	Dog Attack Questionnaire	15/11/2022	PUBLIC	

Question Number	Question Text	Question Answer
1	Date of Attack	15-Nov-2022
2	Are you injured (Please seek medical advice if yes)	Yes
3	Is the Dog registered	Yes

Figure 10 - Enquiry Detail View

It is also possible to include other Enquiry List links from the other General Enquiry modules. This provides active links to Applications, Licenses, Properties, Rates, Primary and Secondary Requests, Parent and Child Associated Requests and their Enquiry Detail View. A hyperlink is included via the first column to enable the Customer to view the details of the chosen item, providing a nested enquiry (Figure 11).

Applications (BLDPLN) List						
Application Class	Formatted Application Number	Location Address	Status	Formatted Application Location	Application Description	
Building and Planning	265/2010/AT1/1/1	25 Woodside Road	None	25 Woodside Road, NAIRNE SA 5252	test	

Registers (ALLMOD)		
Description	Property	Date
Test Description 3	Property Address : 1 Graduate Street, WAYVILLE SA 5034 Property Description : Parcel W1, 123 CH Crw	
Test - Fritz - Smart Client		

Licenses (DCAT) List						
Formatted Licence Number	Formatted Licence Location	Licence Number	Licence Year	Status	Licence Class	Licence Type
50/1998/CAFE/001	300 Bourbon Street, ADELAIDE SA 5000	50	1998	Reminder Notice issued	Food Act Reporting Licence Class	Cafe

Properties (APROP) List				
Property ID	Property Address	Property Description	Property Ward	Property GIS Reference
1227242	1 Liet Street ADELAIDE SA 0891	Lot 16B DP 11 of 0.0136Ac		

Rates (PROP) List				
Assessment Number	Valuation Number	Formatted Property Address	Rateable Value	Current Years Rates
12452	4400970004	11 John Street, EASTWOOD SA 5063	450000	\$0.00
17171	880017171	235B Mike Street, EASTWOOD SA 5000	0	\$0.00
189102	18910277	1 Liet Street, ADELAIDE SA 0891	780000	\$4,688.40

Figure 11 - Enquiry List group examples where a sub-enquiry can be chosen via the hyperlink for each row.

NOTE: Where possible reciprocal enquiry list links are now available in the other General Enquiry modules, so it is possible to also link from a linked Property back to a Customer Request if desired.

In addition to Request data, both Letters and Attachments can be configured to be available to the Customer. 'Request Attachments' and 'Request Letters' buttons and related hyperlinks allow the Customer to view relevant attachments and documents (Figure 12 and 13).

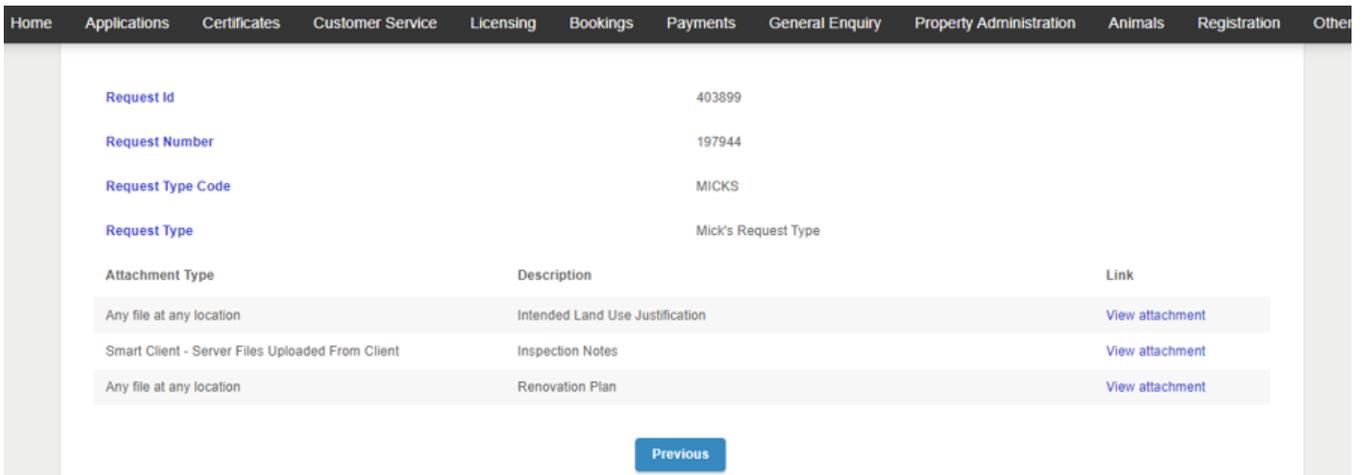


Figure 12 - View Attachments

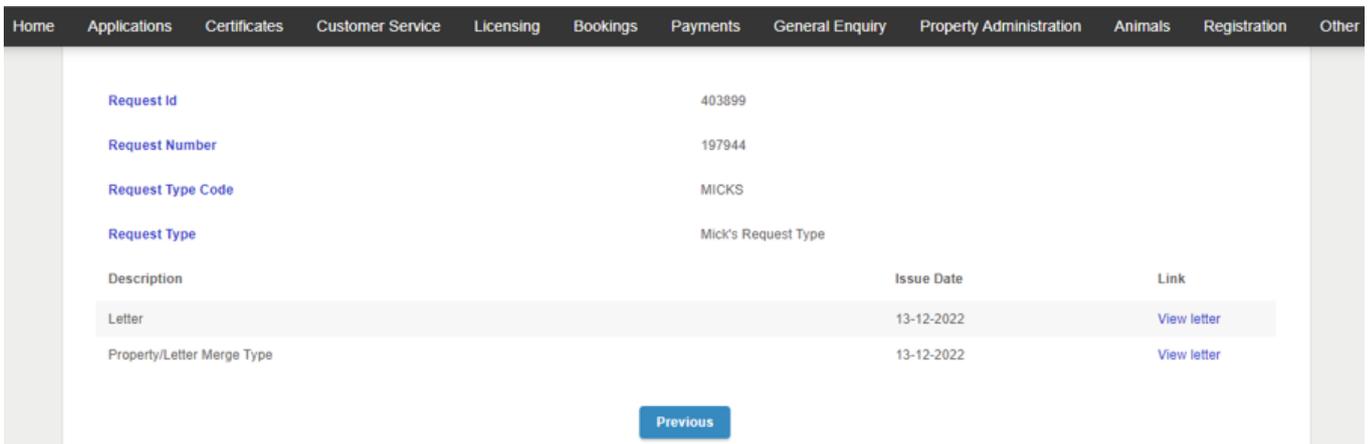


Figure 13 - View Letters

(Only final printed documents where the Document Addressee matches the Pathway Name linked to the ePathway User)

2.5. MY HOME SCREEN

Where configured an ePathway registered user’s My Home screen presents all their relevant transactions. A new ‘View More Details’ link is now available for the Customer to view Customer Request details. Although the My Home screen already has an ‘expand’ option to view basic details, the new ‘View More Details’ option will redirect to the General Enquiry Detail View (Figure 14).

The screenshot shows the 'My Home' dashboard with a navigation bar at the top containing: Home, Applications, Certificates, Customer Service, Licensing, Bookings, Payments, General Enquiry, Property Administration, Animals, Registration, and Other.

Mr Michael James Liet Rates

Postal address 12 Warrigal Rd, Burwood VIC 3127	Ratepayer	189102 (1) - Current 1 Liet Street, ADELAIDE SA 0891 (Rates)	\$4,688.40	□	⋮
Email address MICK.LIET@INFOR.COM	Ratepayer	189100 (5) - Current 431 Mike Street, EASTWOOD SA 5000 (Rates)	\$5,914.74	□	⋮
Communication preference Email	Ratepayer	7 (9) - Current 5 Fanclub Drive, EASTWOOD SA 5063 (Rates)	\$2,827.04	□	⋮
Edit contact details	Consumer	14046 (1) - Current 807 TEST Blankabbreviation, EASTWOOD SA 5063 (Water Billing)		□	⋮
Refresh	Consumer	14044 (6) - Current 1 Bath Streete, RUFUSVILLE SA (Water Billing)		□	⋮
Configure Two Factor Authentication					

[Load more](#)

I want to ...

- [Lodge a development application](#)
- [Request a certificate](#)
- [Report a problem](#)
- [Apply for a permit or licence](#)
- [Make a payment](#)
- [Register my dog or cat](#)
- [Book a function](#)

Debtors

Debtor	15632 (7) (Current) Tim's Test Debtor Type, Tim's 5th Term Code	\$455,206.47*	□	⋮
Debtor	216179 (6) (Current) Default, matts		□	⋮
Debtor	22 (8) (Current) Comcare and Property Debt Categories Only, Monthly	\$75.00*	□	⋮

Animals

Animal Owner	Reference: 5348 (8), Name: Spooner, Class: Guide Doggie, Breed: Doberman	□	⋮
Animal Owner	Reference: 5347 (0), Name: Whoozzagoodboy, Class: Guide Doggie, Breed: Beagle	□	⋮
Animal Owner	Reference: 5346 (2), Name: Whoozzagoodboy, Class: Guide Doggie, Breed: Beagle	□	⋮

[Load more](#)

Requests

Customer Name	197944 - Mick's Request Type - 22-Nov-2022 - Allocated	□	⋮
Customer Name	187763 - Parking Infringement Query - 08-Oct-2020 - Entered		
Customer Name	187762 - Parking Infringement Query - 08-Oct-2020 - Entered		
Complainant - Customer	64881 - Mick's Request Type - 07-Dec-2009 - Allocated		
Complainant - Customer	64837 - Mick's Request Type - 18-Nov-2009 - Allocated		

[View More Details](#)

- Letters
- Attachments
- Refresh

Figure 14 - My Home - View More Details

3. CONFIGURATION

The Customer Request General Enquiry conforms to the features of other ePathway General Enquiry modules. As such, anyone familiar with setting up an ePathway enquiry module will find setting up this new module very similar. The following sections provide more details of where and how this is done.

3.1. GENERAL ENQUIRY PARAMETERS

3.1.1. ENQUIRY PARAMETERS

As mentioned throughout this document, Pathway configuration is required for General Enquiry Customer Requests. This configuration is very similar in nature to the other ePathway General Enquiry modules.

User Authorities

Both ePathway public and registered users have their authorities configured in Pathway. Specific General Enquiry Lists can be assigned to individual users or a group of users (Customers) via Customer Types. This is standard ePathway functionality. An example of its application in the context of General Enquiry Customer Requests is shown on the following pages.

In Figure 15, the ePathway registered user (Ms Nicole Abbott) belongs to the Councillor Customer Type which by default has certain ePathway functions assigned. NOTE: the Customer Type has functions assigned to users by default, however these can be overridden for the individual Customer.

System Administration >> ePathway >> System Parameters >> Web User Maintenance (Customer Profile).

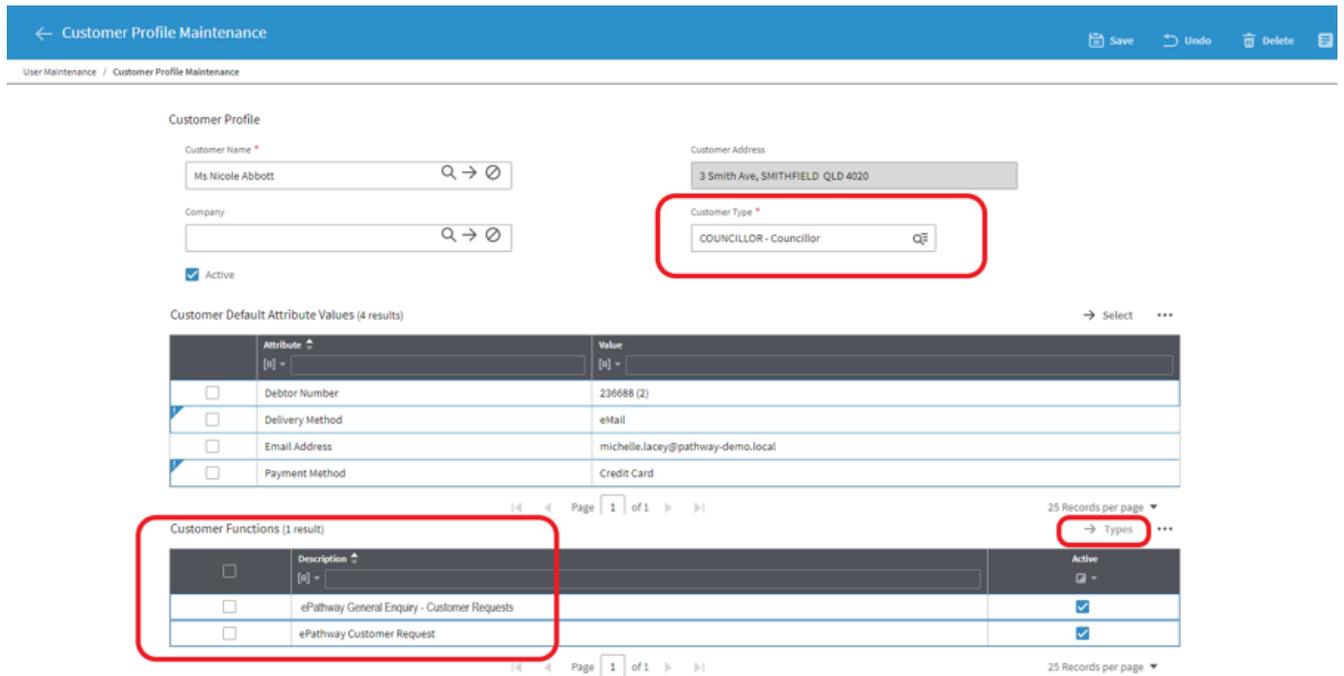


Figure 15 - Customer Profile Maintenance

To control a Customer's access, the ePathway General Enquiry Customer Request module can be either activated or de-activated for each Customer and within this module, each Enquiry List may be assigned or de-assigned. In Figure 16, the ePathway registered user only has access to the Councillors Report Enquiry List.

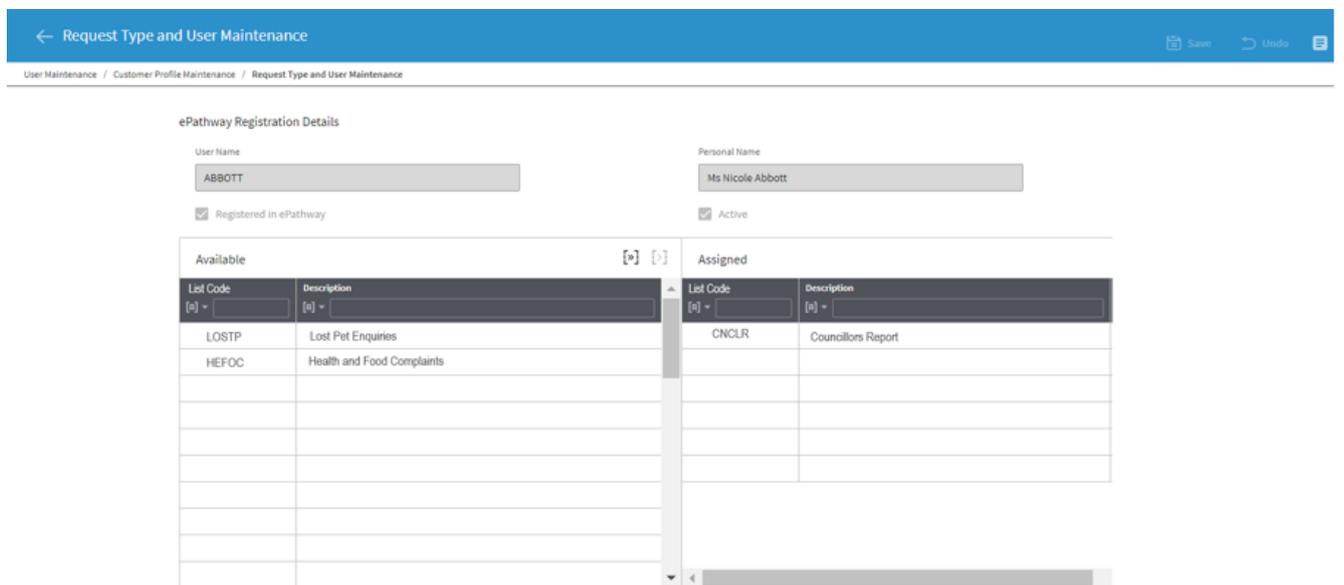


Figure 16 - Request Type and User Maintenance

General Enquiry Parameters

Each General Enquiry Module has its own set of parameters and is configured via a new Customer Request Enquiry Parameters menu item under the ePathway >> General Enquiry menu structure (Figure 17).

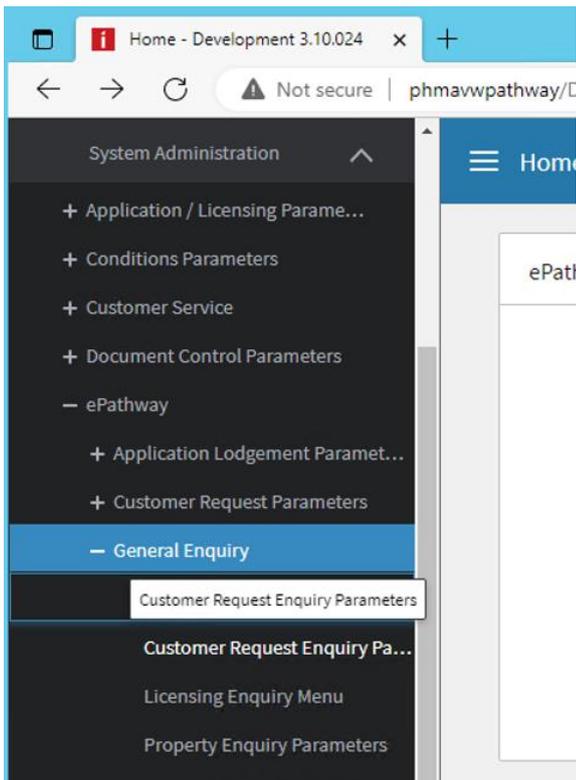


Figure 17 – Customer Request Enquiry Parameters menu option

Choosing Customer Request Enquiry Parameters menu item will open the Customer Request Enquiry List Search Profile form to search for existing Enquiry Lists (Search) or create new Enquiry Lists (New) (Figure 18).

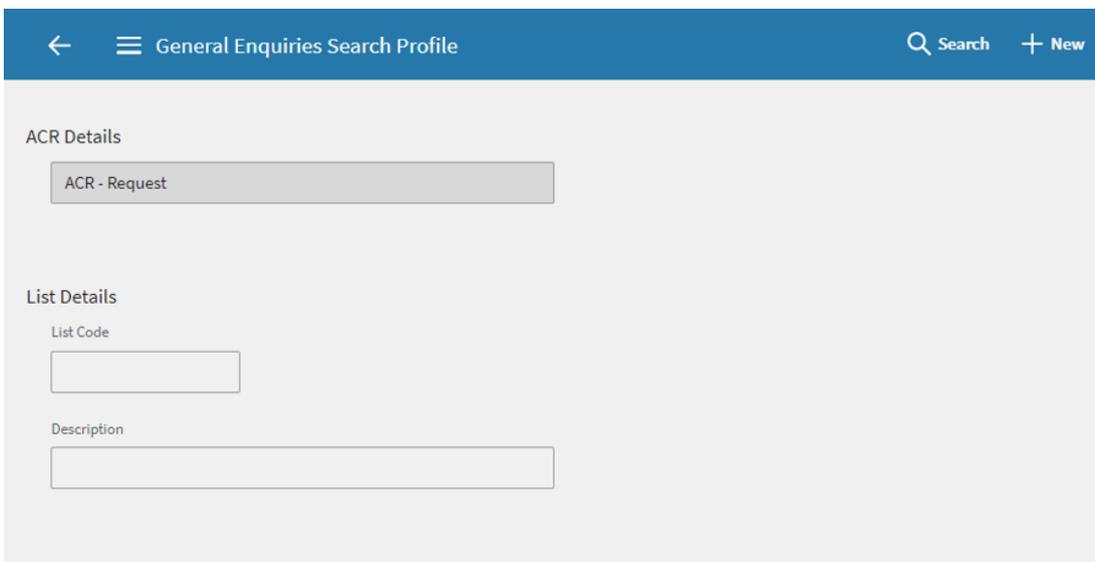


Figure 18 – Customer Request Enquiry List Search Profile

NOTE: The Selection form can be used to nominate which Enquiry List (and thus layout, configuration, and filtering) is applied to the ePathway My Home screen when the View Details action is invoked. In Figure 19 a MYHOME Enquiry List has been specifically defined for this purpose.

Multiple Enquiry Lists may be created (Add/New) and maintained (Modify) via the General Enquiries List Selection form or General Enquiries Search Profile form (Figures 18 and 19).

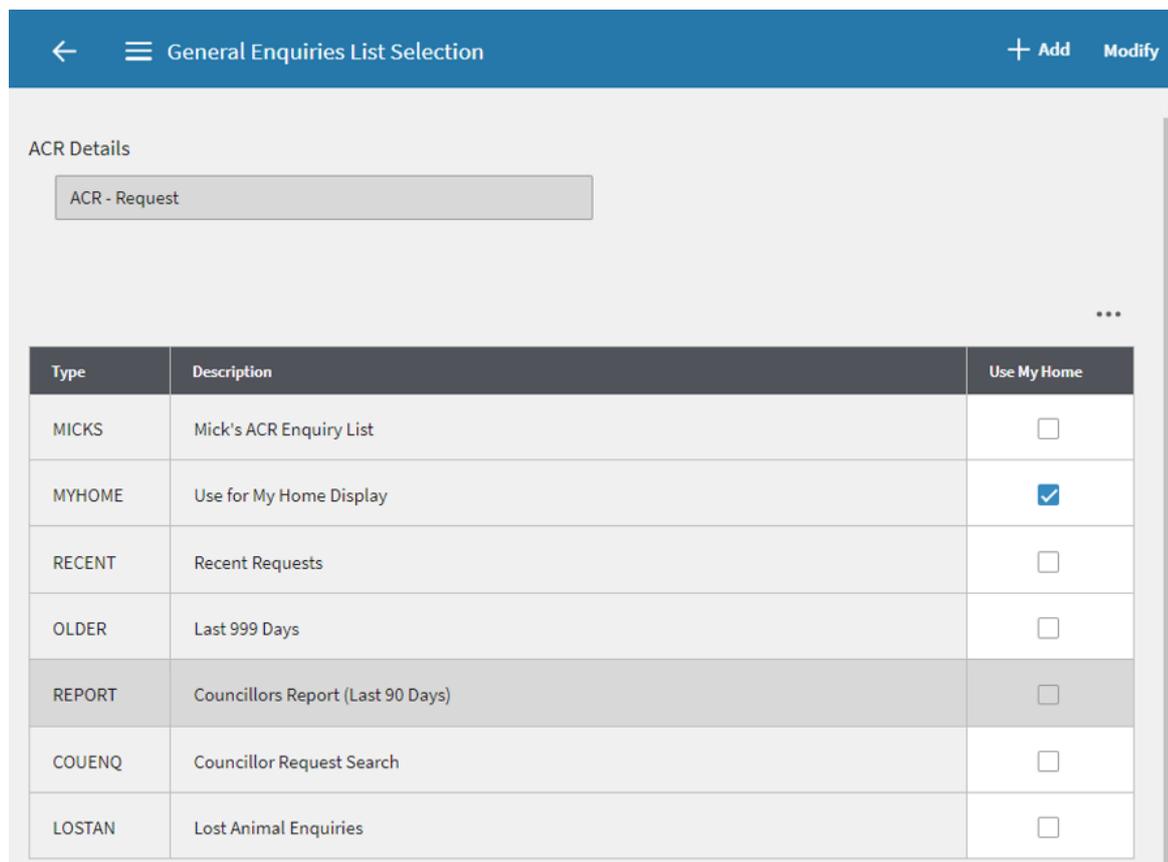


Figure 19 – Customer Request Enquiry List Selection

The Customer Request General Enquiry List Parameters form controls all variables relating to Enquiry Lists (Figure 20).

The 'Stakeholders' option (as per other ePathway General Enquiry modules) enables the selection of specific Stakeholders (e.g., Requestor Types) that are allowed to view 'secured' data fields. Whether or not an Enquiry List is 'secured' is configured in the ePathway Page Layout parameters. Any user given access to an Enquiry List is considered a Stakeholder for any Requests that has the Requestor Type assigned against the Enquiry List.

Refer to Section 3.2.2. of this document for details on this ePathway Page Layout configuration.

To avoid an Enquiry List displaying historic data use the 'Omit Requests Lodged Before' parameter to filter out Customer Requests lodged prior to a certain date.

As mentioned previously in this document there is an option to show the up-front Search Page using the 'Display Search Page Before List' parameter.

Consistent with other ePathway General Enquiry modules, there is an option to configure a direct email for Customers using the ePathway Enquiry List Detail View.

The Display Options for the Customer Request Enquiry Lists include:

- Role Types
- Reference Types
- Merge Types (i.e., Letter Types)
- Attachment Types
- Workflow Task Types

Councils may nominate which 'types' they would like to display for a given Enquiry List. For example, an Enquiry List may be configured not to display Workflow Tasks or Reference Types that are deemed internal. Selecting no types at all will **exclude all** as only explicitly selected types will be included.

Figure 20 – Customer Request Enquiry List Maintenance

The Filter Options for the Customer Request Enquiry Lists include:

- Request Types
- Status
- Workflow Task Types

The Enquiry List will only display the Customer Request records which match these filters. Unlike the Display Options, selecting no Filter Option Types will **include all**. For example, one Enquiry List may be configured to display records for Request Types A and B with a Status of C and a Workflow Task Type of D

or alternatively, configured to display Request Type A without specify any Status code or Workflow Task Types.

Note Security

For Pathway Customer Requests, each Note Type has a default ‘Note Security Level’ which is applied to the Note when created on the Customer Request. This Note Security Level may be subsequently modified by a Pathway user if they have access.

The valid Note Security Levels are: General, Restricted, and Confidential.

The visibility of the Note within ePathway General Enquiry will be determined by the Note Security Level:

- General** the Note is visible to public and registered ePathway users.
- Restricted** the Note is only visible to nominated Stakeholders (registered ePathway users).
- Confidential** the Note is not visible to anyone within ePathway.

Customer Notifications – Email and Letter

Existing Pathway Workflow functionality may be used to notify Customers of any changes in the progress of their request e.g., acknowledgement, status change etc. This may be achieved by incorporating Workflow User Actions such as letter generation and email delivery into the business process. For example, an acknowledgement letter containing the request number, date received, responsible officer, contact details etc. may be issued via an acknowledgement email. This email may also contain a link to the General Enquiry List to enable the Customer to view the record(s) online.

3.1.2. WEB USER AND CUSTOMER TYPES ACCESS

Customer Requests General Enquiries allows multiple Enquiry Lists. To use them it is necessary to assign which users (registered or public) and Customer Types have access.

Adding an Enquiry List to a Customer Type is done via System Administration >> Customer Profile Parameters >> Customer Type Maintenance. Select the Customer Type to update then click on Customer Type Functions (Figure 21).

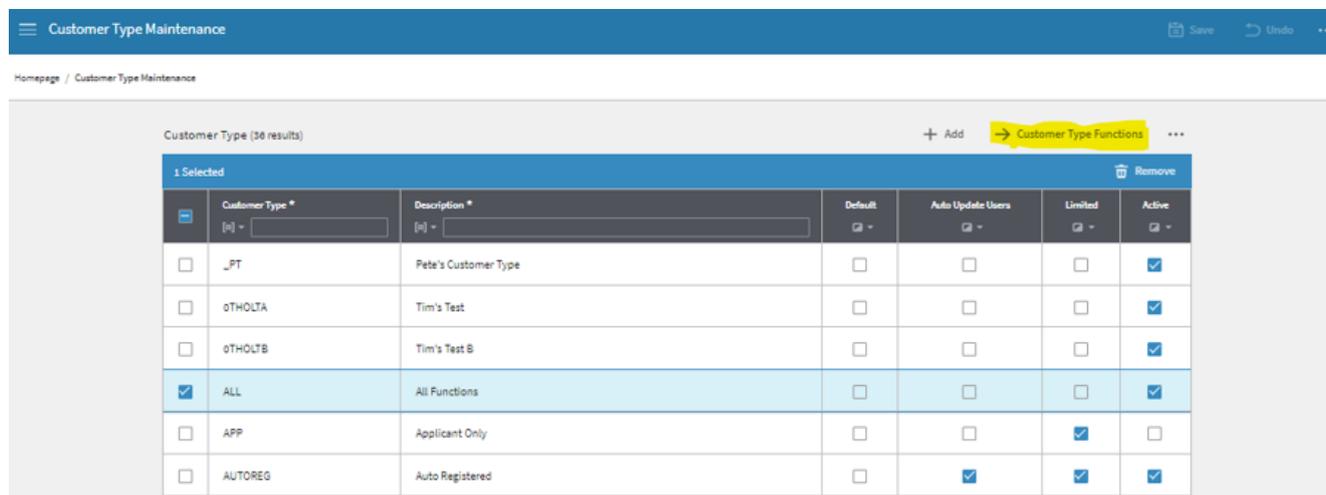


Figure 21 - Customer Type Maintenance

Assign the ePathway General Enquiry – Customer Requests function to the Customer Type then click on the Types button (Figure 22).

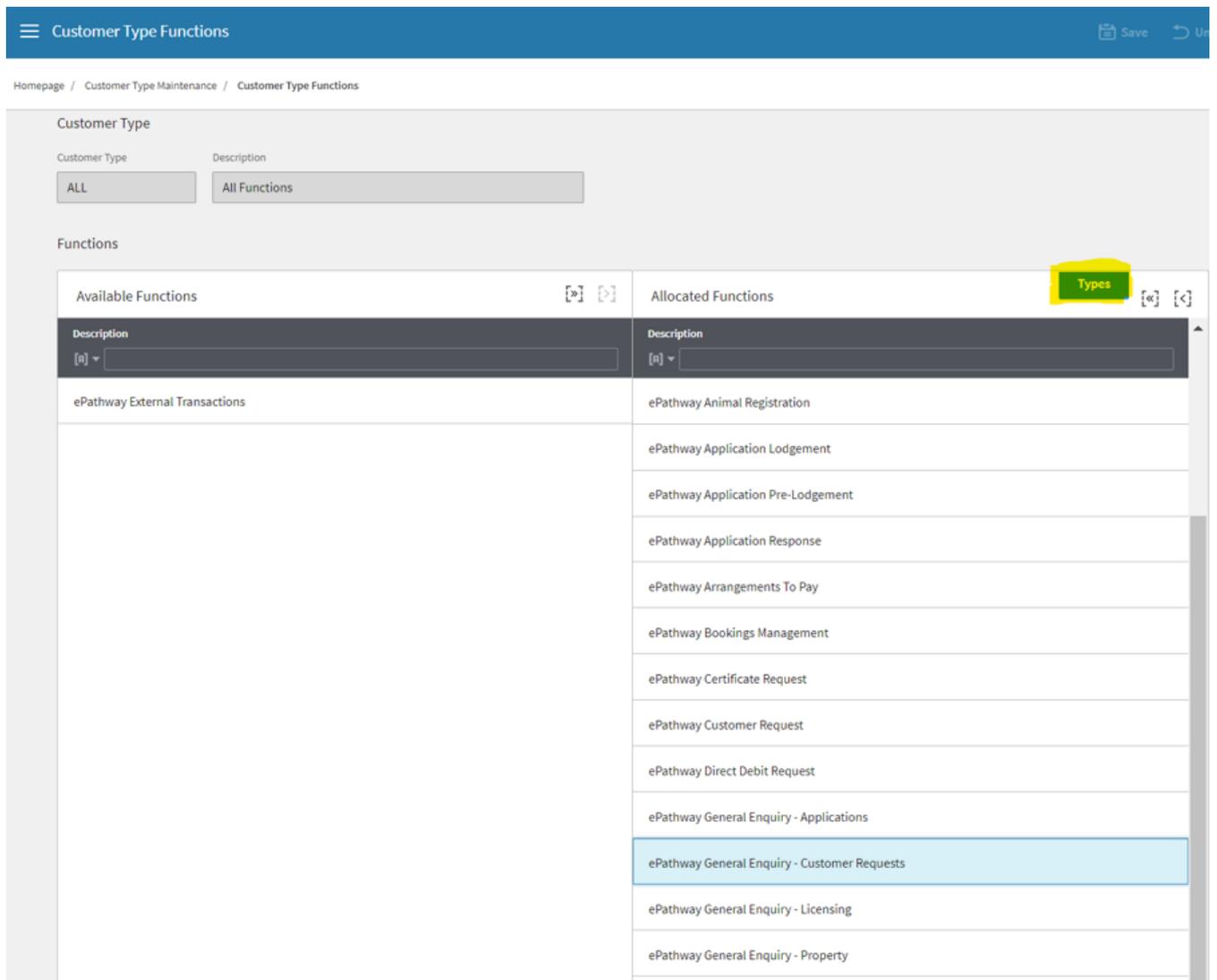


Figure 22 - Customer Type Functions

The List Type Customer Function Type Maintenance form enables the selection of the Enquiry Lists this Customer Type (and the ePathway users assigned to that Customer Type) will be able to access (Figure 23).

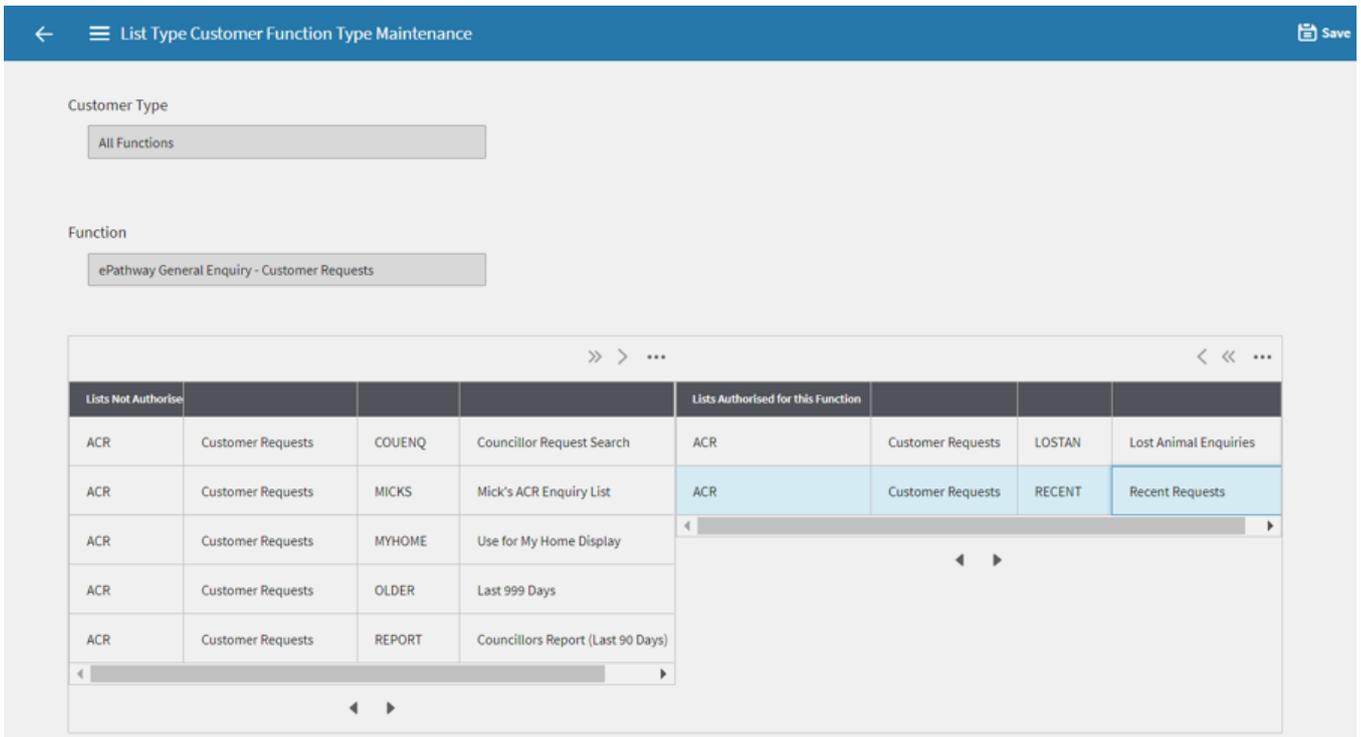


Figure 23 – List Type Customer Function Type Maintenance

Similarly, the ePathway General Enquiry – Customer Requests function and the appropriate Enquiry List can be added to the Public web user either via:

- the Customer Type (method above) or
- by adding them directly to the Public web user account using System Administration >> ePathway >> System Parameters >> Web User Maintenance (Figure 24).

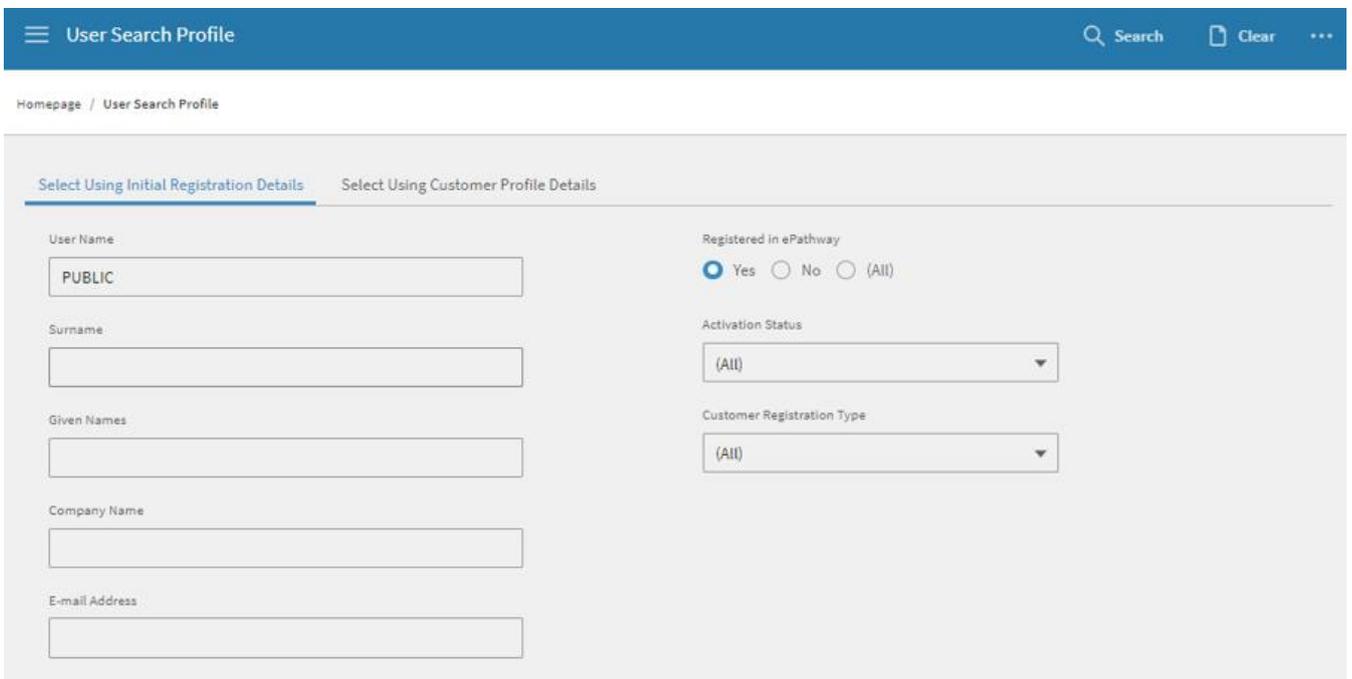


Figure 24 - Web User Maintenance

Search for the Public web user account and once open, go to Options >> Customer Profile (Figure 25).

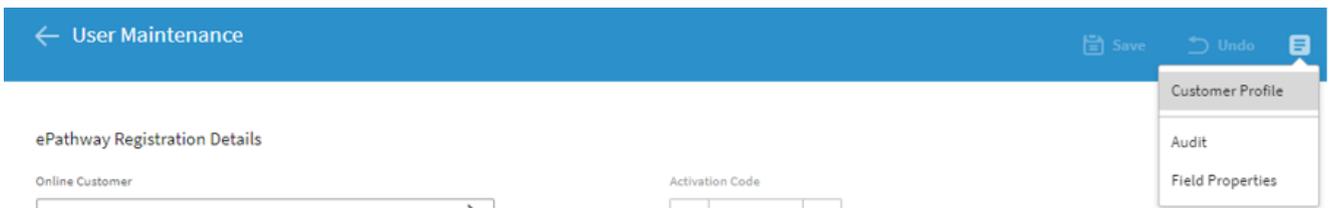


Figure 25 - Web User Maintenance

The ePathway General Enquiry – Customer Requests function can be selected, then Types to enable the Enquiry Lists to be assigned (Figure 26).

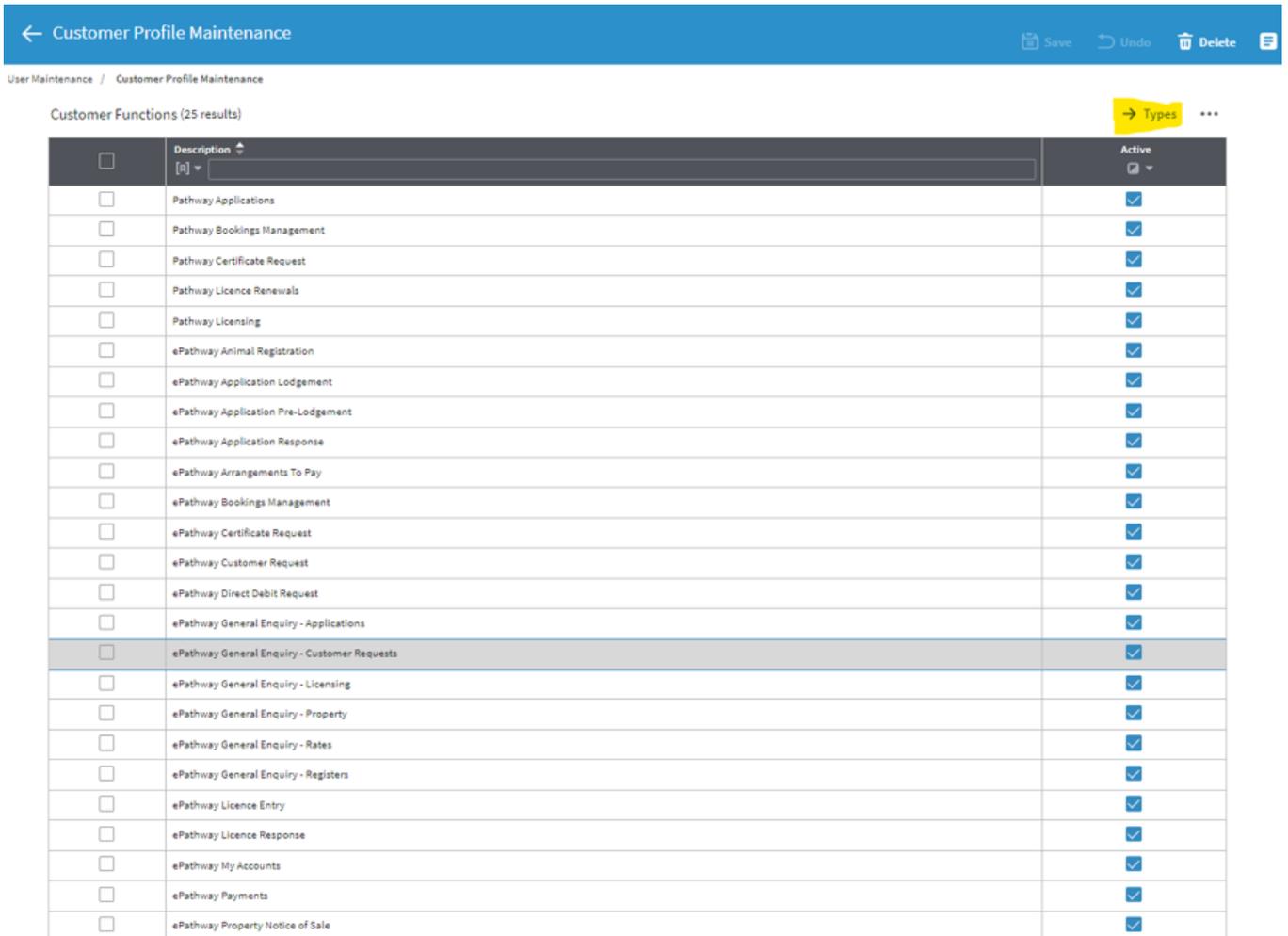


Figure 26 - Customer Profile Maintenance

Allocate the appropriate Enquiry Lists for the Public web user (Figure 27).

NOTE: Enquiry Lists nominated for ePathway registered users should not be assigned, as confidential and private details should only be exposed for the related Customer.

← General Enquiry List and User Maintenance
Save

User Maintenance / Customer Profile Maintenance / General Enquiry List and User Maintenance

ePathway Registration Details

User Name <input style="width: 90%;" type="text" value="PUBLIC"/>	Personal Name <input style="width: 90%;" type="text" value="Joe Public"/>
<input checked="" type="checkbox"/> Registered in ePathway	<input type="checkbox"/> Active

Lists that this User is not able to view	Lists that this User is able to view
List Code	List Code
[*] <input style="width: 90%;" type="text"/>	[*] <input style="width: 90%;" type="text"/>
COUENQ - Councillor Request Search	LOSTAN - Lost Animal Enquiries
MYHOME - Use for My Home Display	RECENT - Recent Requests
OLDER - Last 999 Days	
REPORT - Councillors Report (Last 90 Days)	

Figure 27 – General Enquiry List and User Maintenance

NOTE: This method of allocating Enquiry Lists to the Public web user account can also be applied to other individual ePathway user accounts as required. For example, an individual staff member (or group of staff) may be granted permission to view the ‘Councillor Request Search’ and ‘Councillors Report (Last 90 Days)’ Enquiry Lists.

Once all the above Customer Requests Enquiry Parameters have been established, the changes need to be exported to ePathway via System Administration >> ePathway >> System Processing >> Web Server Export (Figure 28).

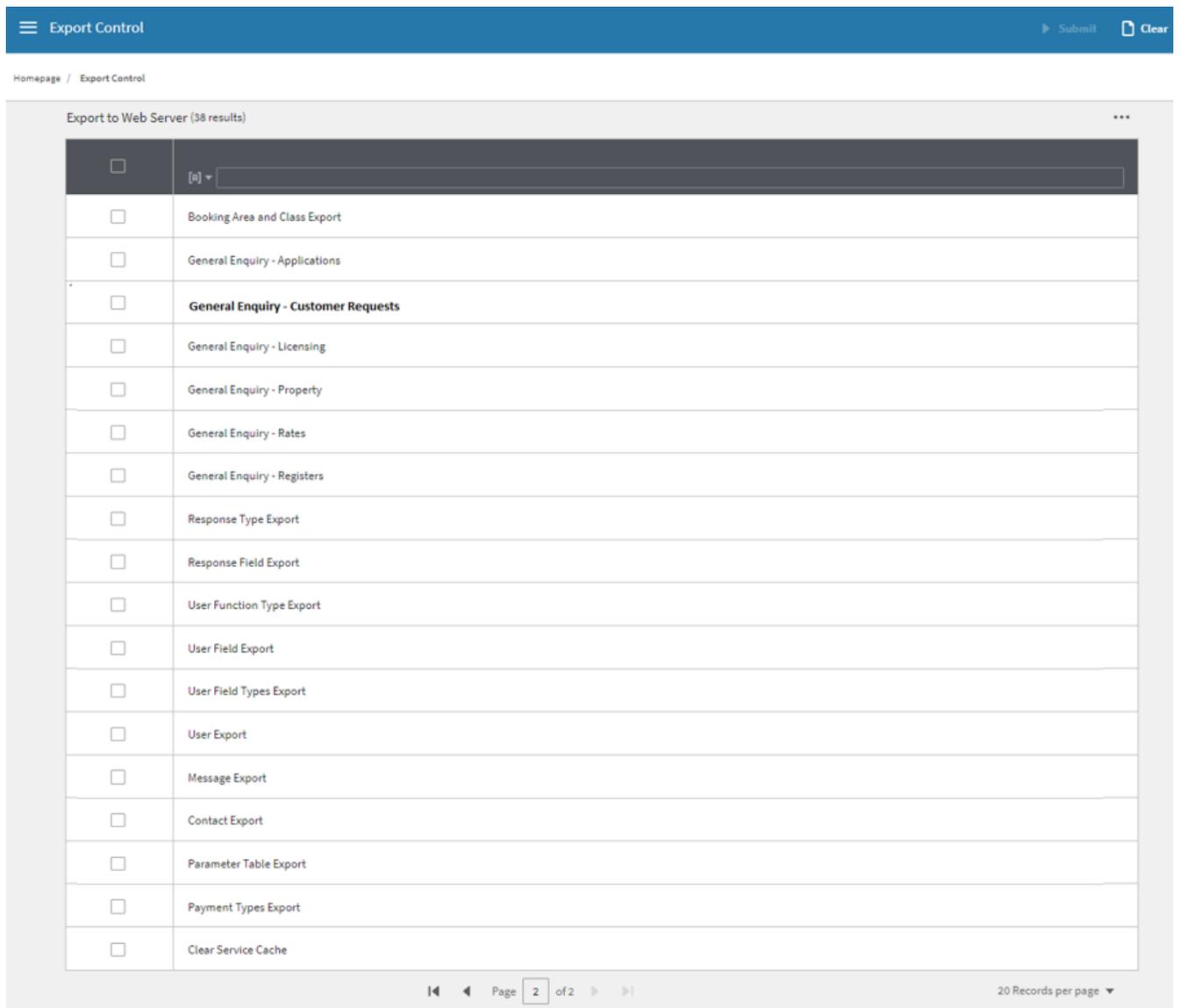


Figure 28 – Web Server Export

3.2. GENERAL ENQUIRY PARAMETERS WITHIN EPATHWAY

3.2.1. ENQUIRY FIELDS

After running the Web Server Export for ‘Function Export’ and ‘General Enquiry – Customer Requests’, the following fields, and columns (groups) will be available to be configured on the ePathway General Enquiry Customer Requests screens.

Table 1: Additional Customer Requests Enquiry fields

FIELD / GROUP	DEFAULT LABEL / DESCRIPTION	TYPE (XMLTYPE)	PARENT GROUP
Request_Id	Request Id	Field (INTEGER 10)	
Request_Number	Request Number	Field (INTEGER 10)	
Request_Type_Code	Request Type Code	Field (TEXT 10)	
Request_Type	Request Type	Field (TEXT 50)	
Request_Status	Request Status	Field (TEXT 50)	
Priority	Priority	Field (TEXT 10)	

FIELD / GROUP	DEFAULT LABEL / DESCRIPTION	TYPE (XMLTYPE)	PARENT GROUP
Date_Priority_Last_Modified	Date Priority Last Modified	Field (DATETIME 20)	
System_Completion_Date	System Completion Date	Field (DATETIME 20)	
Actioning_Officer	Actioning Officer	Field (TEXT 50)	
Receiving_Officer	Receiving Officer	Field (TEXT 50)	
Responsible_Officer	Responsible Officer	Field (TEXT 50)	
System_Date_Entered	System Date Entered	Field (DATETIME 20)	
Date_Received	Date Received	Field (DATETIME 20)	
Date_Responded	Date Responded	Field (DATETIME 20)	
Date_Responded_By	Date Responded By	Field (DATETIME 20)	
Time_Taken_Numeric	Time Taken Numeric	Field (INTEGER 9)	
Time_Taken_Units	Time Taken Units	Field (TEXT 20)	
Request_Source	Request Source	Field (TEXT 50)	
Contact_Type	Contact Type	Field (TEXT 50)	
Requestor_Type	Requestor Type	Field (TEXT 50)	
Available_To_Public	Available To Public	Field (BOOLEAN 1)	
Formatted_Property_Address	Property Address	Field (TEXT 100)	
First_Note	First Note	Field (TEXT 9999)	
Last_Note	Last Note	Field (TEXT 9999)	
Consolidated_Note	Consolidated Note	Field (TEXT 9999)	
Notes	Notes (*)	Column (COLUMN 12)	
Note_Type	Note Type	Field (TEXT 50)	Notes
Note_Description	Note Description	Field (TEXT 9999)	Notes
User_Identifier	User Identifier	Field (TEXT 50)	Notes
Note_Date	Date	Field (DATE 20)	Notes
References	References (*)	Column (COLUMN 12)	
Reference_Type_Code	Reference Type Code	Field (TEXT 20)	References
Reference_Type	Reference Type	Field (TEXT 50)	References
Reference_Value	Reference Value	Field (TEXT 50)	References
Workflow_Tasks	Workflow Tasks (*)	Column (COLUMN 12)	
Task_Type	Task Type	Field (TEXT 50)	Workflow_Tasks
Due_Date	Due Date	Field (DATE 20)	Workflow_Tasks
Actual_Start_Date	Actual Start Date	Field (DATE 20)	Workflow_Tasks
Actual_Completed_Date	Actual Completed Date	Field (DATE 20)	Workflow_Tasks
Task_Responsible_Officer	Task Responsible Officer	Field (TEXT 50)	Workflow_Tasks
Modules	Modules (*)	Column (COLUMN 12)	
Module_Type	Module Type	Field (TEXT 50)	Modules
Module_Description	Module Description	Field (TEXT 100)	Modules
Date_Added	Date Added	Field (DATE 20)	Modules

FIELD / GROUP	DEFAULT LABEL / DESCRIPTION	TYPE (XMLTYPE)	PARENT GROUP
Name_Roles	Name Roles (*)	Column (COLUMN 12)	
Name_Role_Type	Name Role Type	Field (TEXT 50)	Name_Roles
Formatted_Name	Name	Field (TEXT 100)	Name_Roles
Formatted_Address	Address	Field (TEXT 100)	Name_Roles
Questionnaires	Questionnaire (*)	Tree (TREE 12)	
Questionnaire_Code	Questionnaire Code	Field (TEXT 10)	Questionnaires
Questionnaire_Description	Questionnaire Description	Field (TEXT 50)	Questionnaires
Date_Last_Modified	Date Last Modified	Field (DATE 20)	Questionnaires
User_Identifier	User Identifier	Field (TEXT 50)	Questionnaires
Questions	Question (*) (**)	Column (COLUMN 12)	Questionnaires
Question_Number	Question Number	Field (TEXT 12)	Questions
Question_Text	Question Text	Field (TEXT 50)	Questions
Question_Answer	Question Answer	Field (TEXT 50)	Questions
Primary_Enquiry_List	Primary Request (**)	Column (COLUMN 12)	
Secondary_Enquiry_List	Secondary Requests (*) (**)	Column (COLUMN 12)	
Parent_Enquiry_List	Parent Associated Request (**)	Column (COLUMN 12)	
Child_Enquiry_List	Child Associated Requests (*) (**)	Column (COLUMN 12)	
Enquiry_List	Linked Enquiry List for General Enquiry Modules (*) (**)	Column (COLUMN 12)	

(*) Denotes potential for multiple instances.

(**) Denotes need to select an Enquiry List. Note that this list need not be assigned to a Customer or Customer Type and is used to govern the layout and content rather than access.

(***) Questions is a sub-group of the Questionnaires group.

3.2.2. ENQUIRY PAGE LAYOUT

After running the Web Server Export for 'Function Export' and 'General Enquiry – Customer Requests', the Page Layouts can be defined with ePathway (Figure 29).

Home	Configuration	Layout	Enquiries	Web Service Gateway	Impersonation	Other
Page Layout						
This page allows you to define the dynamic page layout for the relevant modules.						
Module	Request Receipt	Default				
ePathway Animal Registration	<input checked="" type="checkbox"/>	No			Metadata Text	
ePathway Application Lodgement	<input checked="" type="checkbox"/>	No			Metadata Text	
ePathway Application Pre-Lodgement					Metadata Text	
ePathway Application Response					Metadata Text	
ePathway Arrangements To Pay					Metadata Text	
ePathway Bookings Management	<input type="checkbox"/>				Metadata Text	
ePathway Certificate Request	<input checked="" type="checkbox"/>	No			Metadata Text	
ePathway Core					Metadata Text	
ePathway Customer Request					Metadata Text	
ePathway Direct Debit Request					Metadata Text	
ePathway General Enquiry - Applications					Metadata Text	
ePathway General Enquiry - Customer Requests					Metadata Text	

Figure 29 - ePathway Page Layout

Standard General Enquiry Page Layout options are available for Customer Requests enabling the configuration of a Summary View and Detail View for each Customer Request Enquiry List (Figure 30).

An example of how to set up these Views is shown from Figure 31 onward.

Home	Configuration	Layout	Enquiries	Web Service Gateway	Impersonation	Other
------	---------------	--------	-----------	---------------------	---------------	-------

Enquiry Lists

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

Module: ACR Pathway Module

Seq.	Code	Description	Instruction	Image			
1	RECENT	Recent Requests	<input type="text"/>	Url <input type="text"/> Text <input type="text"/>	Metadata Text	Summary	Detail
2	OLDER	Last 999 Days	<input type="text"/>	Url <input type="text"/> Text <input type="text"/>	Metadata Text	Summary	Detail
3	REPORT	Councillors Report (Last 90 Days)	<input type="text"/>	Url <input type="text"/> Text <input type="text"/>	Metadata Text	Summary	Detail
4	COUENQ	Councillor Request Search	<input type="text"/>	Url <input type="text"/> Text <input type="text"/>	Metadata Text	Summary	Detail
5	LOSTAN	Lost Animal Enquiries	<input type="text"/>	Url <input type="text"/> Text <input type="text"/>	Metadata Text	Summary	Detail
6	MICKS	Mick's ACR Enquiry List	<input type="text"/>	Url <input type="text"/> Text <input type="text"/>	Metadata Text	Summary	Detail
10	MYHOME	Use for My Home Display	<input type="text"/>	Url <input type="text"/> Text <input type="text"/>	Metadata Text	Summary	Detail

Figure 30 - Enquiry List Page Layout Maintenance

Summary View

To configure the Summary View (Figures 31 and 32), select Page Groups and fields to be displayed. Standard Page Layout configuration options are available. The 'Secure' flag provides additional security to ensure that only Stakeholders (configured in Pathway – refer to Section 3.1 of this document) may view the information.

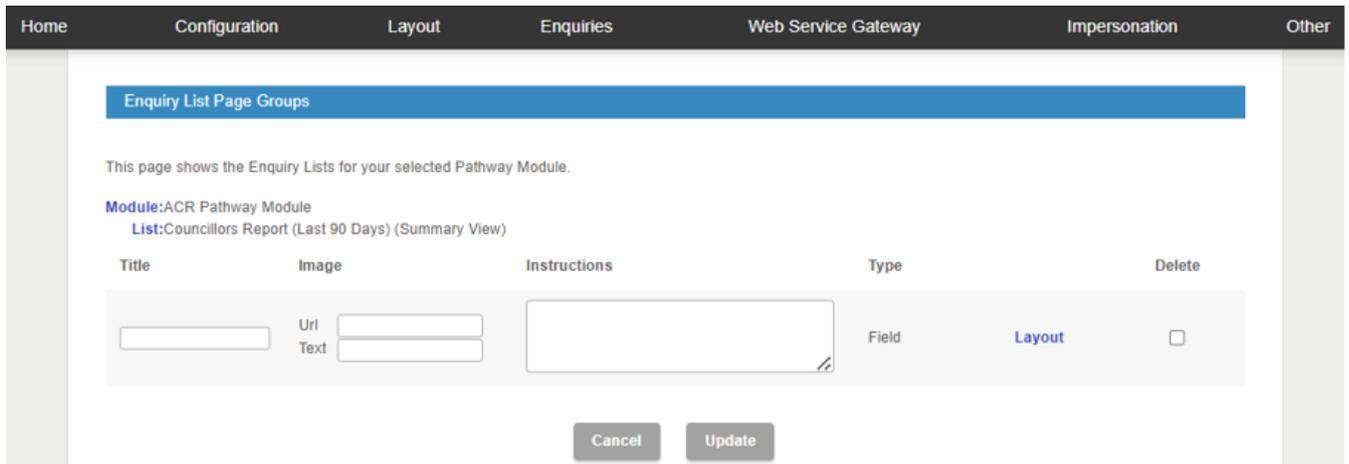


Figure 31 – Enquiry List Summary View Page Group Maintenance

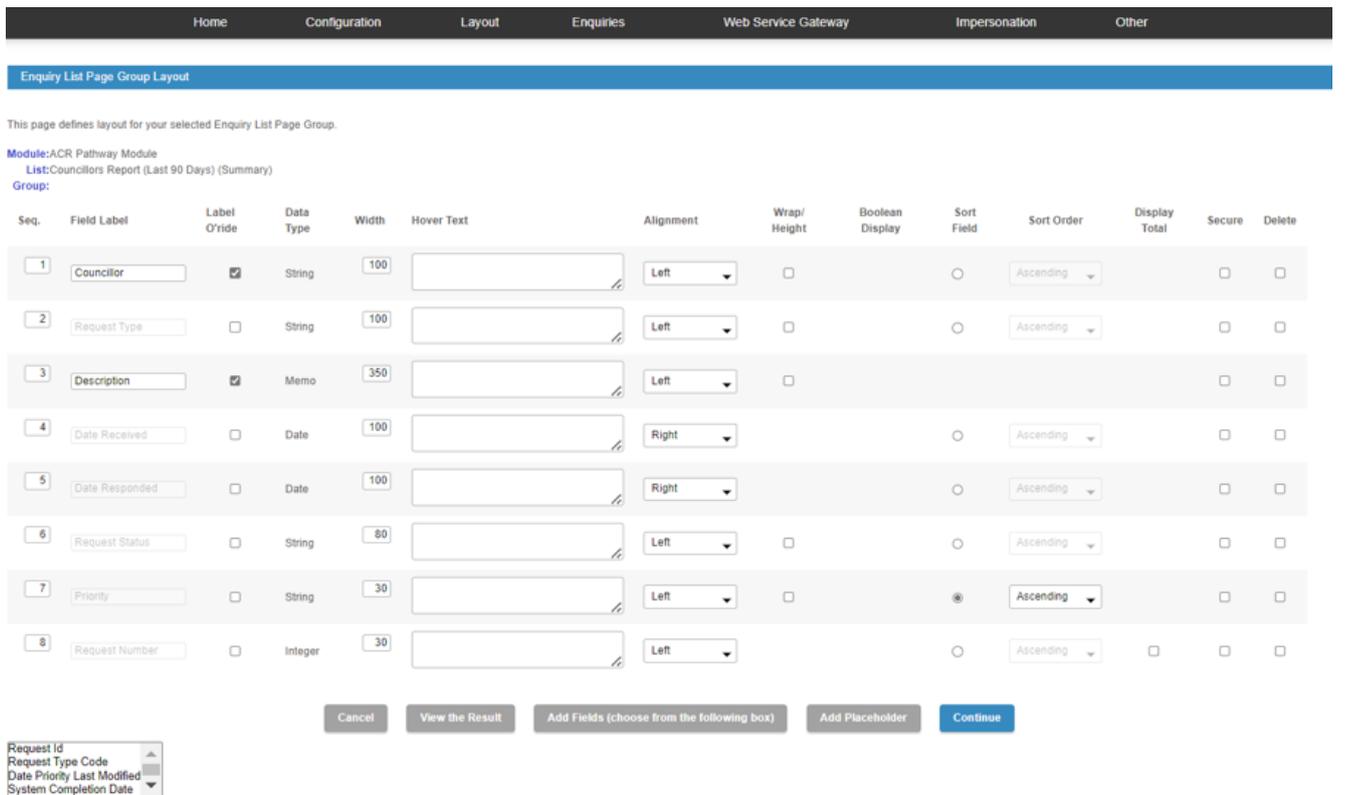


Figure 32 - Enquiry List Summary View Page Group Fields Maintenance

Detail View

To configure the Detail View (Figures 33 and 34), select the Page Groups and fields to be displayed. Standard Page Layout configuration options are available. As per the Summary View, the 'Secure' flag provides additional security to ensure that only Stakeholders (configured in Pathway – refer to Section 3.1 of this document) may view the information.

Home
Configuration
Layout
Enquiries
Web Service Gateway
Impersonation
Other

Enquiry List Page Groups

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

Module: ACR Pathway Module
List: Councillors Report (Last 90 Days) (Detail View)

Seq.	Title	Image	Instructions	Type	Label Width	Label Alignment	Omit Null	Child Group		Delete
1	Details	Url Text		Field	100	Left	<input type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>
3	References	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>
4	Workflow Tasks	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>
5	Modules	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>
6	Name Roles	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>
7	Parent Associated R	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Customer Requests (COUENQ): Councillor Request Search	<input type="checkbox"/>
8	Child Associated Rer	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Customer Requests (COUENQ): Councillor Request Search	<input type="checkbox"/>
9	Primary Request	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Customer Requests (COUENQ): Councillor Request Search	<input type="checkbox"/>
10	Secondary Requests	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Customer Requests (COUENQ): Councillor Request Search	<input type="checkbox"/>
11	Questionnaires	Url Text		ColumnTree			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>
20	Notes	Url Text		Column			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Layout	<input type="checkbox"/>

Cancel
Add a group into this enquiry
Update

Figure 33 - Enquiry List Detail View Page Group Maintenance

The Detail View (Figure 34) depicts only one of the Page Group's fields - Details. Other Page Groups, such as References, Workflow Tasks, Modules, Name Roles etc. will each have their own similar field Layout configuration options. The Detail View represents one ePathway screen presented to the end user.

Home Configuration Layout Enquiries Web Service Gateway Impersonation Other

Enquiry List Page Group Layout

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

Module: ACR Pathway Module
 List: Councillors Report (Last 90 Days) (Detail)
 Group: Details

Add Fields: All Fields Remaining Fields only

Seq.	Field Label	Label O'ride	Data Type	Width	Hover Text	Alignment	Wrap/ Height	Same Row	Omit Null	Boolean Display	Child Group/ Boolean Text	Secure	Delete
1	Request Number	<input type="checkbox"/>	Integer	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
2	Request Type Code	<input type="checkbox"/>	String	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
3	Request Type	<input type="checkbox"/>	String	200		Left	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
4	Request Status	<input type="checkbox"/>	String	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
5	Priority	<input type="checkbox"/>	String	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
6	Date Priority Last Mod	<input type="checkbox"/>	Date	200		Left	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
7	Actioning Officer	<input type="checkbox"/>	String	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
8	Receiving Officer	<input type="checkbox"/>	String	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
9	Responsible Officer	<input type="checkbox"/>	String	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
10	Date Received	<input type="checkbox"/>	Date	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
11	Date Responded	<input type="checkbox"/>	Date	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
12	Date Responded By	<input type="checkbox"/>	Date	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
13	Time Taken Numeric	<input type="checkbox"/>	Integer	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
14	Time Taken Units	<input type="checkbox"/>	String	200		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>

Figure 34 – Enquiry List Detail View Page Group Fields Maintenance

3.2.3. EPATHWAY ENQUIRY SEARCH PARAMETERS

The search options relevant to General Enquiry Customer Requests can be activated unless an Enquiry List is set to bypass search filters (Figure 36). Search options can also be re-labelled and re-ordered if required (Figure 35).

Home Configuration Layout Enquiries Web Service Gateway Impersonation Other

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 - Customer Requests

Select an Enquiry List: Councillor Request Search

Sequence	Description	User Text	Active
1	Formatted Number Search	Request Number Search	<input checked="" type="checkbox"/>
2	Date Search		<input checked="" type="checkbox"/>
3	Address Search		<input checked="" type="checkbox"/>

Update

Figure 35 – Activated Enquiry List Search Options

Home	Configuration	Layout	Enquiries	Web Service Gateway	Impersonation	Other
------	---------------	--------	-----------	---------------------	---------------	-------

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 - Customer Requests

Select an Enquiry List: Councillors Report (Last 90 Days)

Sequence	Description	User Text	Active
<input type="checkbox"/>	Address Search	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Date Search	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Formatted Number Search	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>

Update

Figure 36 – Deactivated Enquiry List Search Options (auto search)

3.2.4. NEW TEXT CODES AND SYSTEM CONFIGURATION CODES

ePathway screen text is configurable with much of the text determined by the painted layout. Some text that appears on other forms is defined via Text Codes. The following table lists each of the new Text Codes introduced with this change (all added to the General Enquiry group) with their default text values and where they are used:

TEXT CODE	DEFAULT VALUE	WHERE USED
GeneralEnquiry.DownloadToCsvButton	Download	Button label on the General Enquiry Summary View form to initiate download of results to a CSV file.
GeneralEnquiry.DownloadToCsvFilename	searchresults.csv	Default name of CSV file to download from General Enquiry Summary View.
GeneralEnquirySearch.EnterRequestNumber	Please enter a value for the Request Number	General Enquiry Formatted Number Search screen – Error label
GeneralEnquirySearch.RequestNoInstructions	Search for requests using Request Number	General Enquiry Formatted Number Search screen – Instructions header
GeneralEnquirySearch.RequestNoSearchInstructions	Use this option if you wish to perform the search for a nominated request. Please enter the request number, then click on the search button to start the search.	General Enquiry Formatted Number Search screen – Instructions content
GeneralEnquirySearch.RequestNumber	Request Number	General Enquiry Formatted Number Search screen – Field label
Navigation.GeneralEnquiryRequestEnquiry	Customer Request Enquiry	General Enquiry Menu Label

The following new System Configuration item have been added:

CONFIGURATION CODE	DEFAULT VALUE	PURPOSE
GeneralEnquiry.DisplayCsvDownload	False	Enable the Download button on the General Enquiry Summary View form to initiate download of results to a CSV file. Set to True to enable this new feature.

3.2.5. NEW GENERAL ENQUIRY MENU ITEM

The new ‘Customer Requests Enquiry’ menu option shown in Section 2.1 Figure 1, can be activated/deactivated and ordered via the ePathway system menus. This is done via ADMIN >> Layout >> System Menu >> General Enquiry >> Items (Figure 37).

Sequence	Text	Icon	Selected Icon	Active
1	Enquiry Lists	blank.gif	blank.gif	<input checked="" type="checkbox"/>
2	Application Enquiry	blank.gif	blank.gif	<input checked="" type="checkbox"/>
3	Property Enquiry	blank.gif	blank.gif	<input checked="" type="checkbox"/>
4	Rates Enquiry	blank.gif	blank.gif	<input checked="" type="checkbox"/>
5	Registers Enquiry	blank.gif	blank.gif	<input checked="" type="checkbox"/>
6	Licence Enquiry	blank.gif	blank.gif	<input checked="" type="checkbox"/>
7	Customer Request Enquiry	blank.gif	blank.gif	<input checked="" type="checkbox"/>

Figure 37 - System Menu Items for General Enquiry

NOTE: Consider deactivating the older ‘Customer Request Enquiry’ menu item now the more configurable General Enquiry implementation is available. This is done via ADMIN >> Layout >> System Menu >> Customer Service >> Items (Figure 38).

Sequence	Text	Icon	Selected Icon	Active
1	New Request	blank.gif	blank.gif	<input checked="" type="checkbox"/>
2	Edit Request	blank.gif	blank.gif	<input checked="" type="checkbox"/>
3	Customer Service Enquiry	blank.gif	blank.gif	<input type="checkbox"/>

Figure 38 - System Menu Items for General Enquiry

3.3. INVOKING VIA THE EXTERNAL REQUEST BROKER (ERB)

The ePathway External Request Broker (ERB) allows a direct link to a specific Enquiry List, or a specific record contained within the Enquiry List. For example, an ERB link could be included within a corporate web page to open the ‘Lost Animal Enquiries’ Enquiry List. This bypasses the need for a Customer to click the menu option and select the appropriate Enquiry List. Use of the ERB is documented separately. A new Module Code of EGEACR has been added to include General Enquiry Customer Requests. The Class should be left blank, and the Type assigned the Enquiry List code in the query string. The FormattedNumber can be assigned the request number if desired.

NOTE: ERB has a force logon feature if the Enquiry List is only accessible to ePathway registered users.

For a host site with address, <https://epathway.infor.com/ePathway/DEV>, the following URL will display request 197944 in the ‘Councillors Request Search’ Enquiry List (COUENQ) (Figure 39):

<https://epathway.infor.com/ePathway/DEV/Web/GeneralEnquiry/ExternalRequestBroker.aspx?Module=EGEACR&Class=&Type=COUENQ&FormattedNumber=197944>

Enquiry Detail View

Details

Request Id	403899
Request Number	197944
Request Type Code	MICKS
Request Type	Mick's Request Type
Request Status	Allocated
Priority	3
Date Priority Last Modified	21/11/2022
System Completion Date	
Actioning Officer	Mick Liet
Receiving Officer	Mick Liet
Responsible Officer	Mick Liet
System Date Entered	21/11/2022
Date Received	21/11/2022
Date Responded	
Date Responded By	5/12/2022
Time Taken Numeric	0
Time Taken Units	Days
Request Source	Pathway
Contact Type	External
Requestor Type	Person in Council Area
Available To Public	True
First Note	22-Nov-2022 10:27:45 - Mick Liet - General Note Initial Note entered on main form
Last Note	22-Nov-2022 10:27:45 - Mick Liet - General Note Initial Note entered on main form
Consolidated Note	22-Nov-2022 10:27:45 - Mick Liet - General Note Initial Note entered on main form

Notes

Note Type	Note Description	Date	User Identifier
General Note	Initial Note entered on main form	21/11/2022	Mick Liet

References

Reference Type Code	Reference Type	Reference Value
EPWGNAME	ePathway Givennames	MICK
EPWMPHONE	ePathway Mobile Phone	0408084321
EPWSNAME	ePathway Surname	LIET
EPWEMAIL	ePathway e-Mail Address	MICK.LIET@INFOR.COM

Figure 39 – ePathway External Request Broker initiated Detail View example

Similarly, the following URL will initiate the ‘Councillors Report Last 90 Days’ Enquiry List (REPORT) without the need to supply a FormattedNumber (Figure 40):

<https://epathway.infor.com/ePathway/DEV/Web/GeneralEnquiry/ExternalRequestBroker.aspx?Module=EGEACR&Class=&Type=REPORT>

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

Councillors Report (Last 90 Days)

Listed below are the results for the enquiry that you requested. If available, you can click on the first column to display the details for that entry.

Available Enquiry Lists Download

Select an alternate Enquiry list
 Councillors Report (Last 90 Days) ▼

Councillor	Request Type	Description	Date Received	Date Responded	Request Status	Priority	Request Number
Xiang Liu (XILIU)	All module links attached		28/10/2022	28/10/2022	Actioned	2	197794
Xiang Liu (XILIU)	All module links attached		1/12/2022	1/12/2022	Actioned	2	197997
Xiang Liu (XILIU)	Mick's Request Type	** Modify Me - Oh, yes, you know you want to do it! **	28/10/2022		Allocated	3	197793
Jo Aitken	Dog Attack	Given Name: nick Surname: gabb Contact Customer: No Request Location: 13 Greenhill Road, WAYVILLE SA 5034 Request Latitude: -34.9424505 Request Longitude: 138.5861744 Visible to Public: No Property Id: 1210054 Questionnaire: 1) Date of Attack Answer: 2022-11-15T00:00:00 2) Are you injured (Please seek medical advice if yes) Answer: Yes 3) Is the Dog registered Answer: Yes 4) Dog Disc Number Answer: 12345 5) Short de...	15/11/2022		Unactioned	3	197905
Jo Aitken	Dog Attack	Surname : gabb Given Names : nick	15/11/2022		Unactioned	3	197906
Jo Aitken	Dog Attack	Given Name: test Surname: trest Contact Customer: No Request Location: 162373 stalink road, systematic 4505 Visible to Public: No Questionnaire: 1) Date of Attack Answer: 2) Are you injured (Please seek medical advice if yes) Answer: No 3) Is the Dog registered Answer: No 4) Dog Disc Number Answer: 5) Short description of dog Answer: 6) Detailed account of event Answer:	15/11/2022		Unactioned	3	197907
Jo Aitken	Dog Attack	Surname : Liet Given Names : Mick Mobile Phone : 34566754	16/11/2022		Unactioned	3	197914
Kelly Jamieson 2	Lost Dog	Surname : Liet Given Names : Mick	17/11/2022		New request	3	197922
Jo Aitken	Dog Attack	Surname : Liet Given Names : Mick	17/11/2022		Unactioned	3	197923
Ross Stephens	ePathway - Application Lodgement	New ePathway Application 1998/770/DA/0 has been lodged for 1 Liet Street, ADELAIDE SA 0891.	17/11/2022	17/11/2022	Actioned	3	197924

Page 1 of 3
 1 2 3 ▶ ❏

Figure 40 – ePathway External Request Broker initiated Summary View example (Registered Users)

In each of the above ERB examples the Customer (user) will be asked to sign in to ePathway, if they have not already, as these Enquiry Lists are not available to the ePathway public user.

The following URL will initiate the publicly available 'Recent Requests' Enquiry List (RECENT) and will be executed without the need to prompt for login (Figure 41):

<https://epathway.infor.com/ePathway/DEV/Web/GeneralEnquiry/ExternalRequestBroker.aspx?Module=EGEACR&Class=&Type=RECENT>

Recent Requests

Listed below are the results for the enquiry that you requested. If available, you can click on the first column to display the details for that entry.

Available Enquiry Lists: Recent Requests

Choose a Request to enquire upon

Map View Download

Request Number	Request Type	Requestor Type	Property Address
197944	Mick's Request Type	Person in Council Area	1 Liet Street, ADELAIDE SA 0891
197930	Lost Dog	ePathway Request	
197923	Dog Attack	ePathway Request	
197922	Lost Dog	ePathway Request	
197914	Dog Attack	ePathway Request	
197906	Dog Attack	ePathway Request	

Figure 41 – ePathway External Request Broker initiated Summary View example (Public user)

ePathway Receipting

Enhancements

ePathway Payments

Incident: WAIK 15860410 UX and Smart Clients	Work Item: 56760 KB:	Fix: ERS:
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PXPAY PAYMENT GATEWAY STYLING ENHANCEMENT

The PxPay Payment Entry page has had styling enhancements made to it to improve the page layout.

ePathway Setup Wizard

Incident: UX Client	Work Item: 59313 KB:	Fix: ERS:
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PASSWORDS MASKED

In the ePathway Setup Wizard, payment gateway passwords have always been enterable as clear text. We have made a change to mask these passwords with asterisks.

Licensing

Enhancements

Licensing Parameters

Incident: UX Client	Work Item: 58459 KB:	Fix: ERS: 87112
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LICENSING - ADD NOTES FUNCTIONALITY

The Note function has been added to the Licensing Module. This requires the following set up:

1. Licensing >> Licensing Classes - <Class>.
 - a) Options – Class Parameters. Assign Note Types and move to the correct order if required.
 - b) Options – Group Parameters. Assign Note Types to each Responsibility Group Level where parameter access is required by clicking on the Level to select it, Modify, assign Note Types.
 - c) Options – Class Maintenance/Enquiry. Assign Notes and move to the correct order if required.
 - d) Options – Group Maintenance/Enquiry. Assign Notes to each Responsibility Group Level where maintenance/enquiry access is required by clicking on the Level to select it, Modify. Assign Notes and remove the tick in Insert, Change or Delete if those functions are not required by that Level.
2. Licensing >> Licensing Parameters - <Class>.
 - a) Search for and select Note Types, Figure 1.

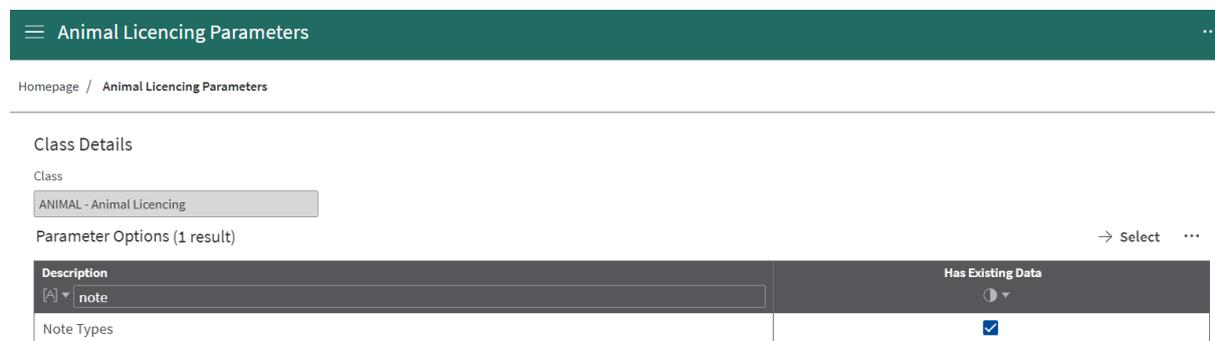


Figure 1

- b) Add to create a new Note Type, Figure 2.

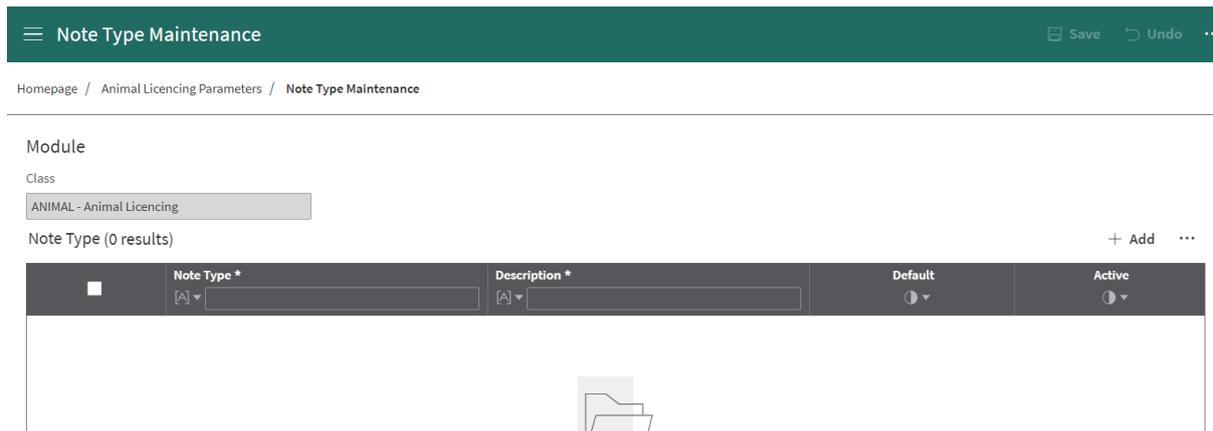


Figure 2

c) Create a Note Template as shown in Figure 3.

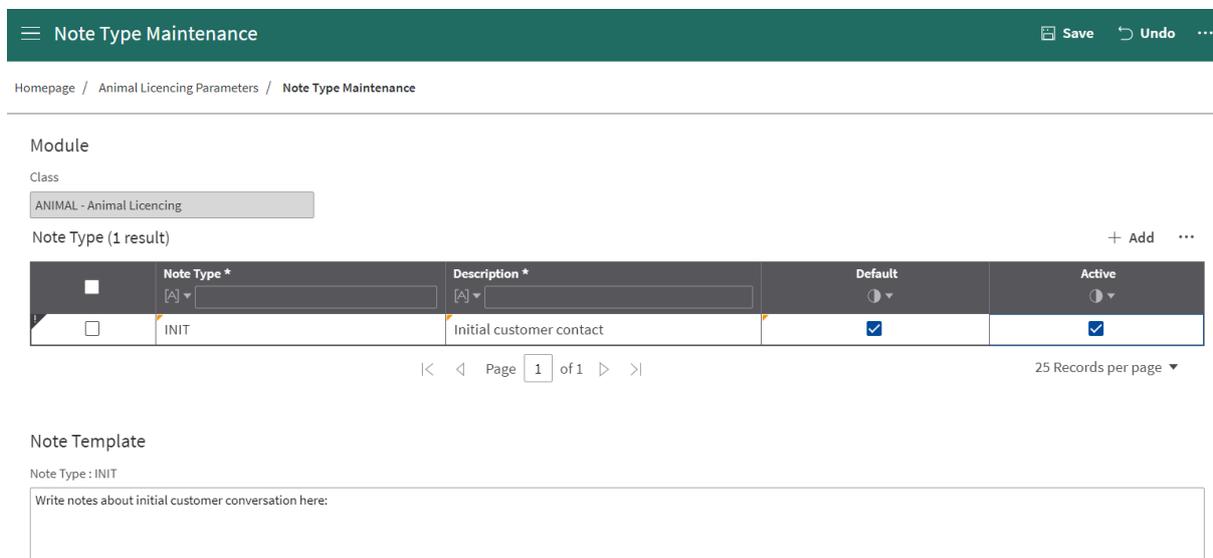


Figure 3

3. Notes can be created via Licensing >> Licensing Maintenance - <Class> - Options – Notes, Figure 4.

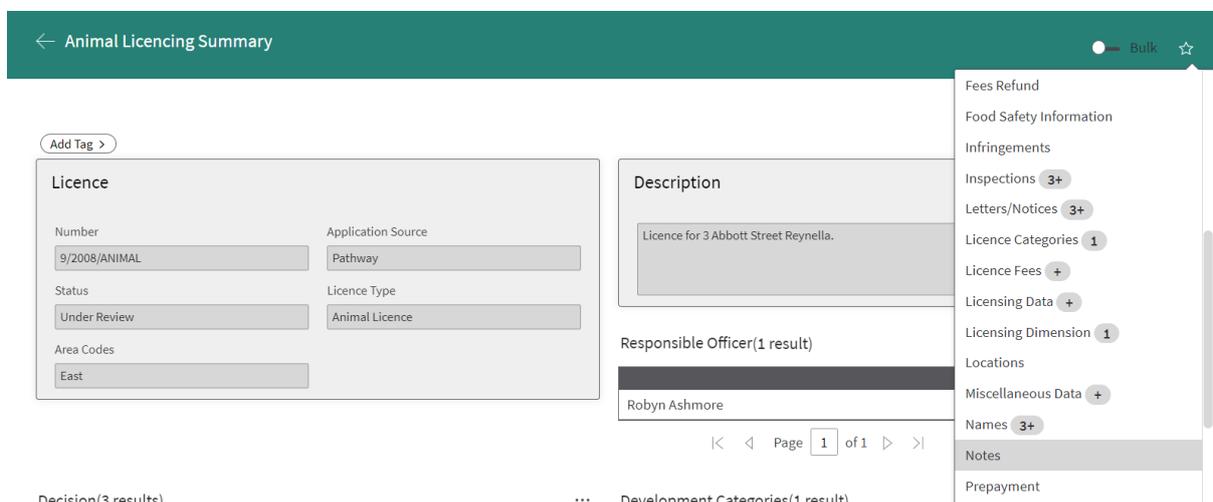
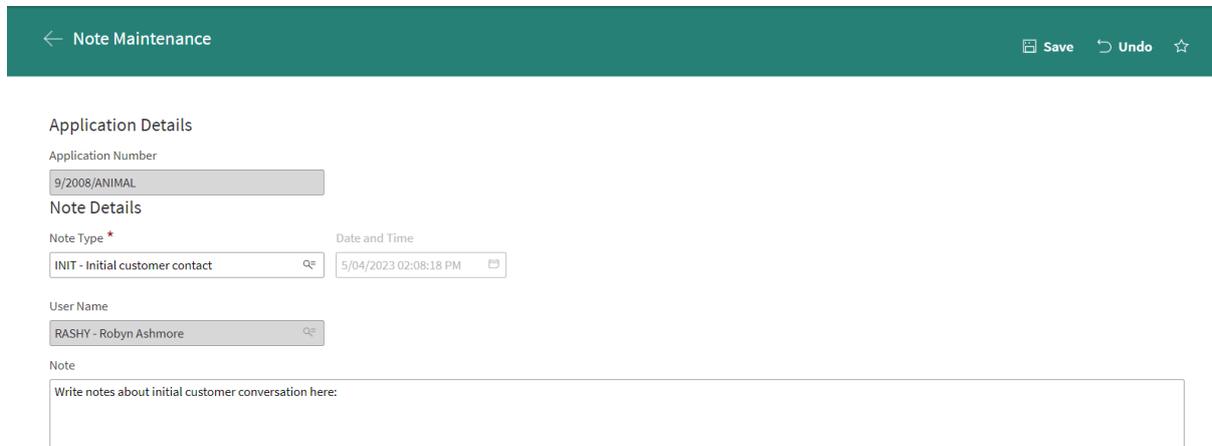


Figure 4

- a) The form will automatically search on opening. To create a new Note, click on New.
- b) If you have created a Note with Default on that Note Type will be created, Figure 5.



The screenshot shows a web application interface for 'Note Maintenance'. At the top, there is a green header bar with a back arrow, the text 'Note Maintenance', and three icons: 'Save', 'Undo', and a star. Below the header, the form is organized into sections:

- Application Details:** A label 'Application Number' is followed by a text input field containing '9/2008/ANIMAL'.
- Note Details:**
 - Note Type ***: A dropdown menu showing 'INIT - Initial customer contact' with a search icon.
 - Date and Time**: A text input field showing '5/04/2023 02:08:18 PM' with a calendar icon.
 - User Name**: A text input field showing 'RASHY - Robyn Ashmore' with a search icon.
- Note**: A large text area with the placeholder text 'Write notes about initial customer conversation here:'.

Figure 5

4. Rebuild the Licensing Word Processing Header File by running Word Processing >> Word Processing Parameters >> Header File Maintenance after upgrading.
5. Notes can be added to Merge Types using the new Notes Letter Extract LLC_Notes. This is via menu Licensing >> Licensing Parameters - <Class> - Letter Extract.

Property Administration

Enhancements

Move Certificate

Incident: UX Client	Work Item: 57817 KB:	Fix: ERS: 67902
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MOVE CERTIFICATE

A new function, Move Certificate, has been made available via menu Property Administration >> Document Processing >> Move Certificate. This function enables Certificates with a Status of New to be moved from one Property to another where the Property has a Status of Current or Proposed, Figure 1.

NOTE: The only setup required for this function is to assign the menu to the staff who will be doing the work.

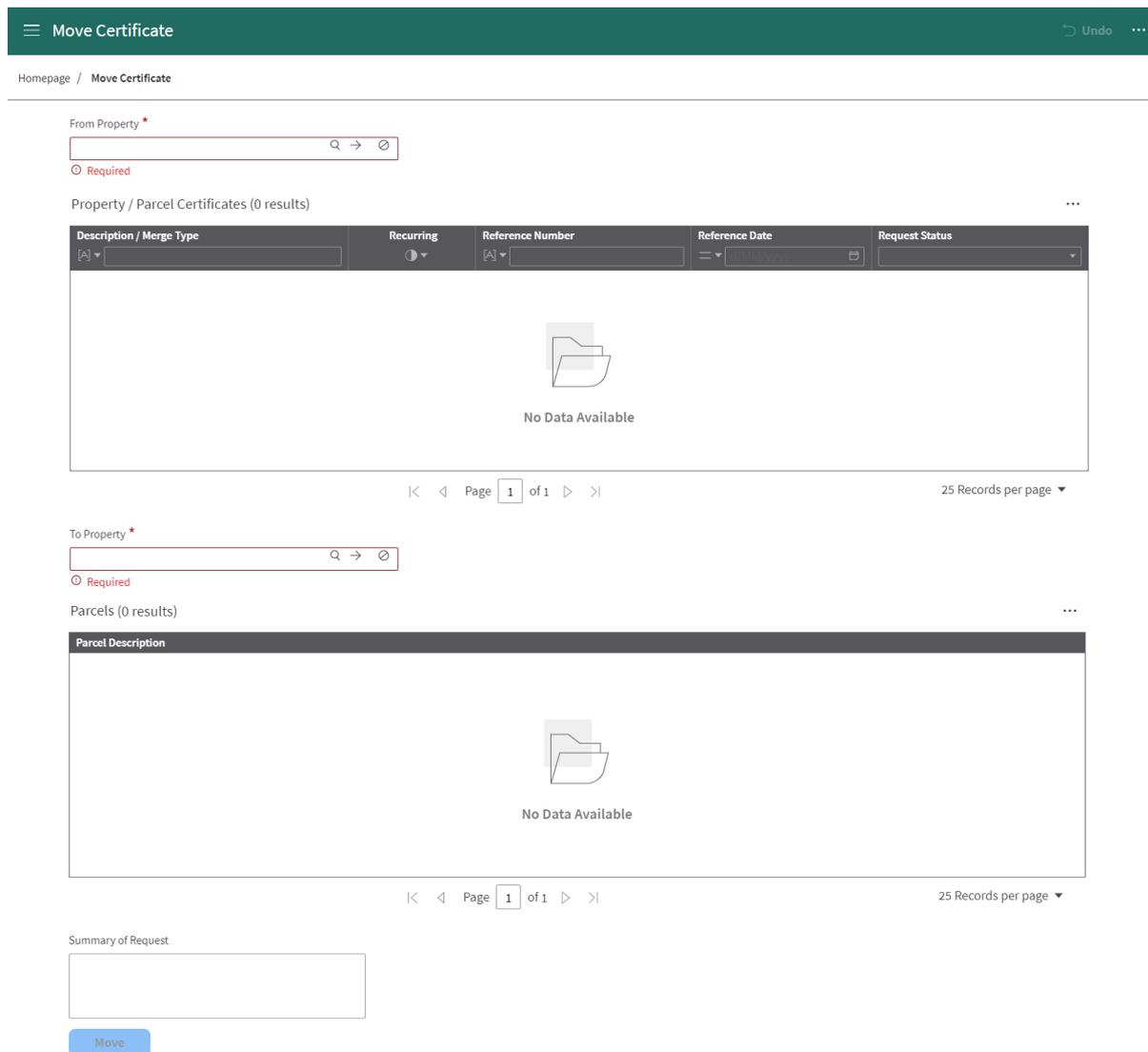


Figure 1

When the From Property is chosen, a list of new property-level (and if applicable, parcel-level) Certificates are displayed, Figure 2.

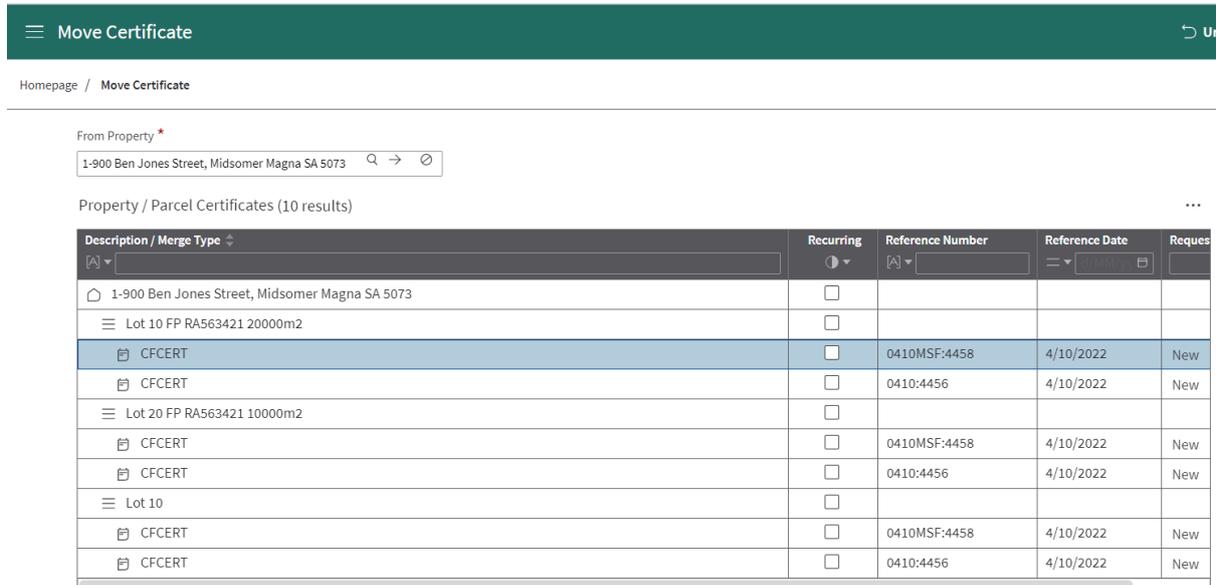


Figure 2

The first certificate listed is selected by default or click on another line to select that Certificate and the line will highlight as shown in Figure 2.

Once a Property has been added, if the Allow Certificates at Parcel Level Property Parameter is set on (Property Administration >> Property Parameters >> System Parameter Maintenance), a list of associated parcels is shown in Parcels, below the To Property field, Figure 3. One of these can be selected as the destination for the Certificate if desired.



Figure 3

The Summary of Request field in the Move form shows the information in the Summary of Request field on the Certificate Maintenance form, Figure 4. Usually this only contains the Certificate Merge Type Description but can be overwritten or added to in either form.

← Document Request Maintenance

Property Summary / Property / Parcel Certificate Maintenance / Document Request Maintenance

Request

Property/Parcel Certificates

Request Status: Request Source:

Recurring Allow Regeneration Retain After Final Print

Employee:

Summary of Request
 This is the information that will appear in the Summary of Request field when Moving a Certificate

Document (1 result)

Document Addressee	Details	Final Printed	Requested By
<input type="checkbox"/> Robyn Ashmore	"The Wonderous Property Name", 1 Cadell Shack Road, Cadell SA 5321	<input type="checkbox"/>	Robyn Ashm

Reference Number: Reference Date:

Lodgement Date: Issued Date:

Expiry Date: Completion Date:

Fee: Receipt Number: Receipt Date:

Printer:

...

Figure 4

Once a certificate and destination property or parcel have been chosen, the Move button becomes available to carry out the required processing.

Click on Move and a confirmation message is displayed, Figure 5.

Pathway

Move certificate CFCERT from 1-900 Ben Jones Street, Midsomer Magna SA 5073, Lot 10 FP RA563421 20000m2 to 2-900 Ben Jones Street, Midsomer Magna SA 5073?

Yes
Cancel

Figure 5

Once Yes is selected the move is processed.

Rates Accounting

Enhancements

Rate Notice (NZ)

Incident: UX Client	Work Item: 57818 KB:	Fix: ERS: 82235
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RATE NOTICE (NZ) CONTROL

An enhancement has been made to allow the Rebate Type Details for an Assessment to be exported or printed separately. This is controlled by the new Extract Rebate Type Details check box on the control form.

When turned on, rebate transaction amounts are accumulated by Rebate Type and made available for export to a file or for printing on a document. Amounts are accumulated from current Rating Period transactions for Transaction Types based on the following System Transaction Types and their related Reversal Transaction Types.

- Council Rebates, Government Rebates and Additional Rebates (REBC, REBG and REBA)
- Previous Period Adjustment Council Rebates, Government Rebates and Additional Rebates (REBC-P, REBG-P and REBA-P)

NOTE: Only Rebate Types with transactions will be exported or printed.

Exporting

The details for up to 10 Rebate Types per Assessment can be exported. This can be achieved using the following export fields which can be added to an existing or new Export Format using Export Format Data String Maintenance (accessed via Rates Accounting >> Housekeeping), where *N* is 1, 2, 3...10:

- Rebate Type Code N
- Rebate Type Description N
- Rebate Type Amount N
- Rebate Type Tax Amount N

NOTE: Where multiple rows (multi-page notice) are exported for a given Assessment, the new Rebate Type details will be populated on the last row for that Assessment.

Printing

The details for up to 10 Rebate Types per Assessment can be printed. This can be achieved using the new Rebate Type Details REBTYPDET Extract List Type which has the following Extract List Fields available:

- Rebate_Type_Code
- Rebate_Type_Description
- Rebate_Type_Amount
- Rebate_Type_Tax_Amount

Supplementary Rates Maintenance

Incident: UX Client	Work Item: 57820 KB:	Fix: ERS: 82408
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SUPPLEMENTARY RATES: CATER FOR MAINTENANCE OF RATEABILITY
PERCENTAGE/MIXED DEVELOPMENT FACTOR

Enhancements have been made to Supplementary Rates to allow maintenance of the Rateability Percentage/Mixed Development Factor for Supplementary Rate Types, and to support that capability through the Rates Accounting system.

NOTE:

- Further enhancements to support this capability will be provided in the future.
- The Rates Accounting system can work in one of two modes: in Rateability Percentage mode or Mixed Developments mode, as governed by the Mixed Developments Minimum Calculation Method Rates system parameter found on the Rates System Parameter Maintenance (2 of 3) form. The system is in Rateability Percentage mode if this parameter is set to None, otherwise, it is in Mixed Development mode.
- Forms showing Rateability Percentage/Mixed Development Factor details will have labels reflecting the mode the system is running in. For simplicity, the below release text will assume a system is running in Rateability Percentage mode and will mention details for Rateability Percentage instead of mentioning both the Rateability Percentage and Mixed Development Factor terms.
- The Supplementary Rates system can work in one of two modes: Online mode or Batch mode, as governed by the Online Supplementary Calculation Rates system parameter found on the Supplementary Rates Parameter Maintenance form.
- Where a Rateability Percentage value has not been nominated the full amount (100%) of the charge will be raised. Therefore, when seeing a null Rateability Percentage value, it is to be considered as fully chargeable i.e., 100%.

System Parameter Maintenance

A new system parameter called Don't show Rateability Percentage not 100% warning message has been added to the Rates System Parameter Maintenance (2 of 3) form (Rates Accounting >> Parameters >> System Parameter Maintenance). This parameter is not currently used; it will be used in the next Release.

Supplementary Rate Maintenance

When a Supplementary Entry is created, it is formed using the existing details from the Assessment concerned. Previously, the Rateability Percentage on an Assessment's Rate Type was loaded to the Supplementary Entry Rate Type but the Rateability Percentage value was not visible on the Supplementary Entry page. The Rateability Percentage was however used when charges were calculated.

Enhancements have been made to the Supplementary Rate Type Maintenance form making the Rateability Percentage visible and allowing it to be maintained. This has been achieved by providing two fields:

- New Rateability Percentage which can be maintained
- Current Rateability Percentage which is non-maintainable.

These fields are available for Rates Accounting Rate Types for all Calculation Methods except for Unit Charge Rate Types when the system is in Mixed Developments mode. This occurs as Mixed Development Factor values are not applicable for Unit Charge Rate Types.

When the Supplementary Rates system is working in Online mode the Options available on the Supplementary Rate Maintenance form includes Calculation Results. When selected this option shows the Supplementary Rate Calculation Result form. The Calculation Details section has been enhanced to show Rateability Percentage details in the new Rateability Percentage Change field. For a Supplementary Rate Type that has an Action of Added or Reinstated this field will show the New Rateability Percentage. For other Actions, it will show the change of the Rateability Percentage value. If the value has been increased then a positive value is shown, e.g., if the New Rateability Percentage is 60.00 and the Current Rateability Percentage is 45.00 then this field will show 15.00. If the value has been decreased a negative value is shown.

Supplementary Rates Calculation/Generation

The way the Supplementary Rates charges are calculated has been changed to cater for the ability to maintain Rateability Percentage. This affects the way that charges are calculated for display on the

Calculation Results form (in Online mode) and the Supplementary Rates Calculation Report (in Batch mode). This change caters for a variety of factors that govern how charges are calculated including Tiered Rates for both Base Amount mode and Non-Base Amount mode, Postponed Rates, Maximum Charge amount, Grouping Rate Types (used in the Waste Rate Type Verification function) and Retained Assessments (which can be used when processing a Division).

Previously the calculation of supplementary charges only considered the Rateability Percentage for Rate Types with a Calculation Method of Rate-in-Dollar, or Rate-in-Dollar + Additional Charge. Corrections have been made so that the Supplementary Rates Calculation/Generation works in the same way as the Rates Generation, i.e., Rate Types whose Calculation Method is Unit Charge or Fixed Charge are also considered.

The Supplementary Rates Generation Detail Report can now include Rateability Percentage details on an extra line which is printed after a Rate Type's detail line. This extra line is printed if there is a value in the New Rateability Percentage or the Current Rateability Percentage fields for a Supplementary Rate Type. Existing functionality also causes this extra line to be printed if the system is being run with the Rates System Parameter Automatic Recalculation: Supplementary Rates set On in the Fine Parameter Maintenance form. Corrections have been made to this report so that this extra line is printed correctly for Rate Types that have tiered charges when the system is being used in the Tiered Rating Method = No Base Amount mode.

Supplementary Rates Calculation/Generation Update

This function has been enhanced to load the New Rateability Percentage for a Supplementary Rate Type to the matching Assessment Rate Type.

Rebate Validation and Claims

Incident: SGSC 13127412, COGG 16983283 UX Client	Work Item: 58708 KB:	Fix: ERS:
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ALLOW VALIDATION OF DVA PENSIONER'S POSTCODE

Enhancements have been made to the Rebate Validation and Claims function to allow the postcode of Department of Veteran Affairs (DVA) pensioners to be extracted and loaded to the file sent to Centrelink for validation. A new parameter **Extract Postcode for Department of Veteran Affairs Pensioner** has been added to the Rebate Validation and Claims control form to provide this functionality. When this parameter is checked ON, the postcode for Department of Veteran Affairs pensioners will be extracted. This parameter is only shown for VIC, NSW, and QLD sites (as governed by the Rebate Legislation Group system parameter in the Name and Address Beneficiary Parameters menu option) and is only available when the Run Mode is set to Validation.

The Rebate Matching Report function has been enhanced to now report upon the matching of the postcode of Department of Veteran Affairs pensioners by Centrelink. This is in addition to the Surname matching that currently occurs and the combination of these two can result in four scenarios, with a message being printed on the Rebate Matching Exception Report when a full match does not occur:

SCENARIO	EXCEPTION MESSAGE PRINTED:
Surname and Postcode both match	(No exception message is printed)
Surname matches, Postcode does not match	Match on Number and Name - No match on Postcode
Surname does not match, Postcode matches	Match on Number and Postcode - No match on Name
Surname does not match, Postcode does not match	Match on Number only - No match on Name or Postcode

NOTE: For Centrelink to be able to verify that the postcode of a Department of Veteran Affairs pensioner is valid, the council submitting the file must have the **pcodeMtch** element noted in their work unit (characteristic) profile at Centrelink.

Assessment Maintenance

Incident: WAIK 16622720 UX Client	Work Item: 58799 KB:	Fix: ERS:
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TORAS CODES ENQUIRY

The TORAS Code Enquiry form has been changed so that the codes are shown in TORAS code order.

QV EDEPlus Import

Incident: UX Client	Work Item: 58800 KB:	Fix: ERS: 58800
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QV EDEPLUS IMPORT CONTROL

This function has been enhanced to provide flexibility on the way that an Assessment has its rateability determined and set. This has been achieved by adding the new Rateability Setting Method run parameter on the control form. When set to Method 1 an Assessment will have its rateability set in the way it has always been set. When set to Method 2 the function will work as follows: -

- The QV EDEPlus import file contains the 'Rateability Type' field. Values of 6 and 7 advise that an Assessment is Part Non-rateable.
- When an Assessment is changed from/to Part Non-rateable, the Rateability Percentage on the Assessment's Rate Types is not updated. Exception messages will prompt a user to investigate the change and update the Rateability Percentage on the Assessment's Rate Types if required.

Rates Generation

Incident: TOOW 16349665 UX and Smart Clients	Work Item: 59003 KB:	Fix: ERS:
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RATES GENERATION CONTROL

The order in which reports are processed has been changed, with the Detail Report if required, generated last, enabling other summary reports to be available earlier.

Receipting

Enhancements

Transaction Export

Incident:	Work Item: 59468	Fix:
UX Client	KB:	ERS: 87983

ACCOUNTS RECEIVABLE TRANSACTION EXPORT CONTROL

Two new fields have been added to the CRPAR01 entity for use in exporting of processed Transaction Export reports. The RCPTREF field is populated with the corresponding Receipt Reference (CRCRCPT.REFERENCE) value, and the LINEDESCR field is populated with the corresponding Allocation Receipt Line Description (CRCLINE.DESCR) value.

A new field (TFKCRCALLC) has been added to the CARTRAN entity to enable the new fields on CRPAR01 to be populated.

These fields are only populated for new records.

Supervisor Drawer Enquiry

Incident:	Work Item: 59951	Fix:
UX Client	KB:	ERS: 93668

The form now allows for a profile to be saved and applied. This will then apply the saved data-grid filtering with the profile so that the user can then save the default profile so that the form is loaded and filtered for their needs.

Smart Mobile CityWatch

Enhancements

Smart Mobile CityWatch Payments

Incident:	Work Item: 60052	Fix:
UX Client	KB:	ERS:

RESTRICT UNSUPPORTED PAYMENT GATEWAYS IN CITYWATCH

The web.config setting <SmallScreen><UnsupportedPaymentGateways> has previously been used to disable/hide the payment button in CityWatch. It has now been extended to completely block service calls from within CityWatch to any payment gateways listed.

Valuations

Enhancements

Valuations Report

Incident: UX Client	Work Item: 58721 KB:	Fix: ERS: 87978
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VALUATIONS REPORT CONTROL

Enhancements have been made to the Valuations Report to allow Rateable Values for multiple Rateable Valuation Types to be reported per Assessment and in the various report totals. Refer to the following details.

The following new options are now available:

- **Print Multiple Rateable Valuation Types**
When turned on, Rateable Values for multiple Rateable Valuation Types will be reported (if present) per Assessment.
NOTE: When turned on, the Rateable Valuation Type is printed against every reported Rateable Value, whereas when turned off the Rateable Valuation Type is only printed for reported Rateable Values that have a different Rateable Valuation Type to the default.
- **Search for Rateable Valuation Type**
This is only available if Print Multiple Rateable Valuation Types is on. It has the same functionality as the existing Search for Valuation Type check box except applies to the Rateable Valuations instead of the Valuations.
- **Rateable Valuation Types Swap-List**
This is only available if Print Multiple Rateable Valuation Types is on. It can be used to select the set of Rateable Valuation Types that are considered for the report.