infor Pathway

Sprint Notes 2024.11

Feedback

Your suggestions and comments regarding this documentation are highly regarded. Please contact Infor via https://concierge.infor.com.

Table of Contents

Introduction

This document describes the fixes and software corrections made in Sprint 2024.11 of the Pathway ePathway and Pathway Smart Mobile software.

Included in this document are the following sections:

Online Help
This includes an overview of how to access Pathway Help.

Modules
Each module which has undergone modifications is included in this documentation.

The related information is now contained in the following documents:

- Infor Pathway Sprint Notes 2024.11.pdf
- Infor Pathway Sprint Notes Summary 2024.11.xlsx.

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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

Business Event Notifications and SMS Notifications Integration

Case: UX Client	Work Item: 63475 ERS: 108363

BUSINESS EVENT NOTIFICATIONS

***** Authorised Function *****

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

Notifications Opt-Out
The existing Pathway Authorised Function, Business Event Notifications (BEN), has been expanded to allow the council to opt-out a customer from receiving Business Event Notifications.

This can be configured on the customer's NAR record using the Preferred Notification Method field on the Personal / Company Name Maintenance.

NOTE: The Opt-Out setting will only work for Business Event Notification Types Contacts that use Role Types to provide the email addresses. I.e. The Opt-Out is not supported when a Data Source (XSLT Data Transformer) is used to provide the email address.

NOTE: For details about this new configuration see Name Maintenance under the Name and Address section in this document.

SMS Notifications Integration
A new Pathway Authorised Function, Business Event Notifications SMS, has been developed to allow notifications to be sent to customers via a third-party SMS service provider. The functionality makes use of Pathway's ION-related framework components used by Business Event Notifications (BEN) but does not recognise or require a software licence for Infor OS (ION).

Customers will need to obtain an account with a supported SMS provider. At present, the only supported provider is Twilio but the capability can be extended to work with other SMS providers in the future.

The SMS Provider is configured via the following routes:
- System Administration >> Integration >> SMS >> SMS Provider Maintenance – set up the SMS provider account details and configuration information.
- System Administration >> Integration >> System Parameter Maintenance - selection of active SMS provider.

SMS Provider Maintenance (System Administration >> Integration >> SMS)
This enables the management of SMS Providers. An SMS Provider record has the following parameters:
- Provider Code - a unique predefined code that is specific to the service provider. This must be entered precisely i.e. TWILIO.
- Provider Name - a free text name for the provider e.g. Twilio.
- Provider Description - a free text description of the provider e.g. Twilio Programmable Messaging.
- API Endpoint - selection of the API endpoint configured for the provider.
- Active - used to enable/disable the availability of the provider.
- SMS Product Configuration - where any configuration parameters in the form of name/value pairs are added for your SMS provider (if any). The parameters available are specific to the selected provider.

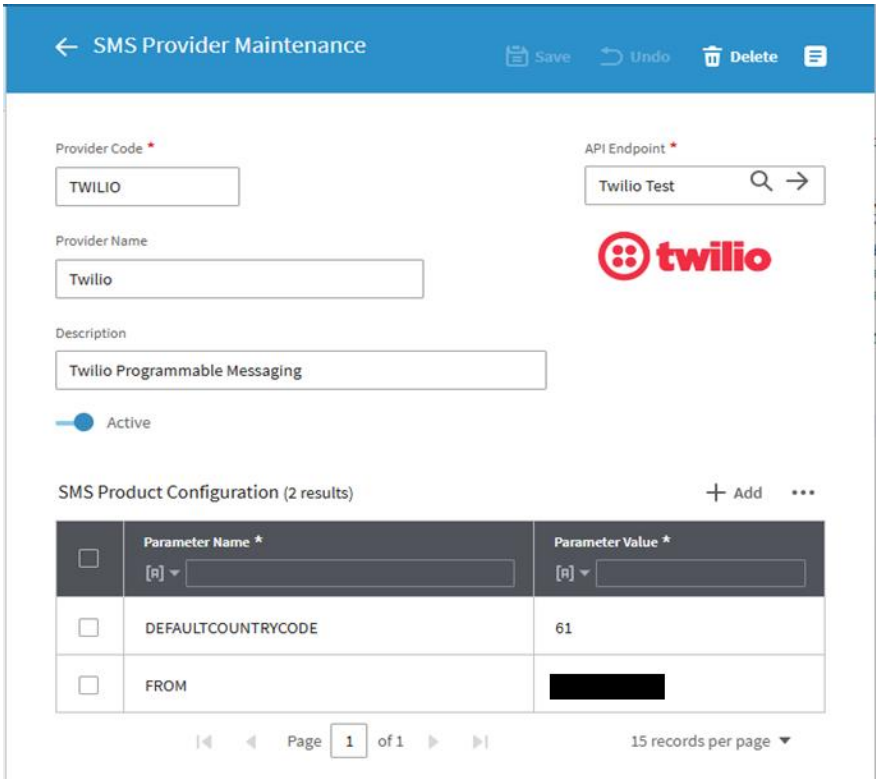


Figure 1

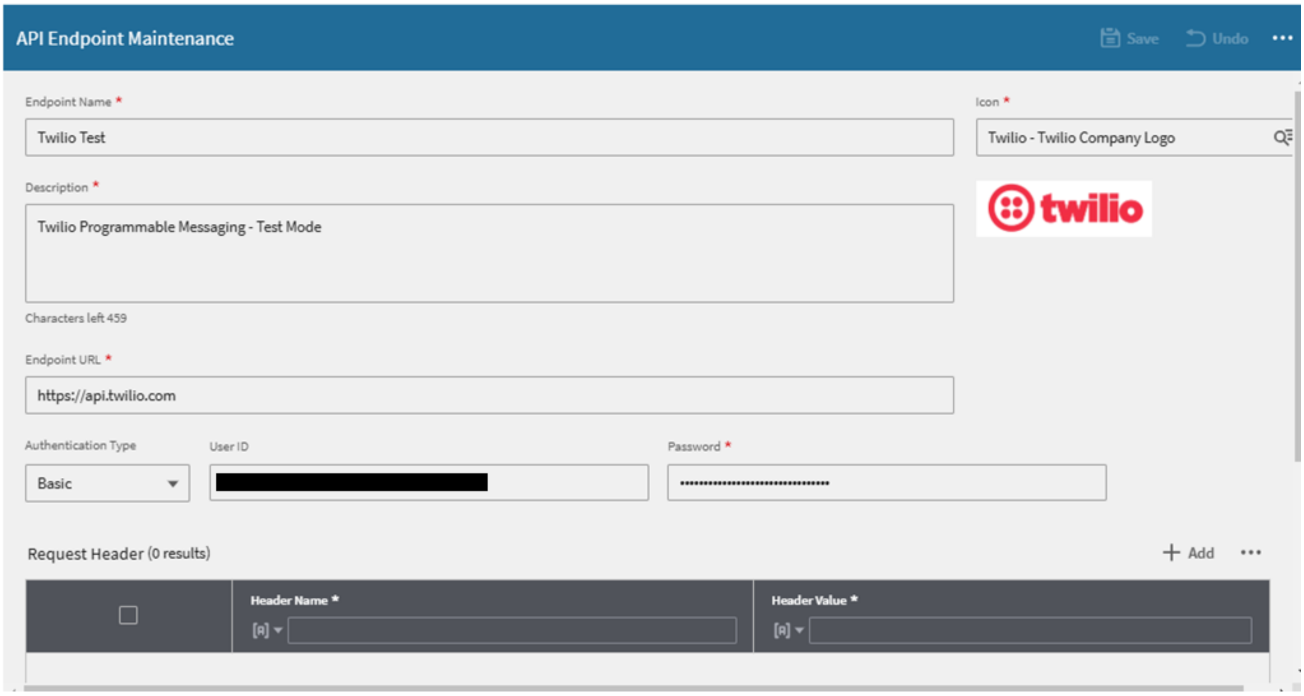


Figure 2

System Parameter Maintenance (System Administration >> Integration)
A new control enables the selection of an SMS Product. When activated, the control can be used to select from the list of active SMS Providers.

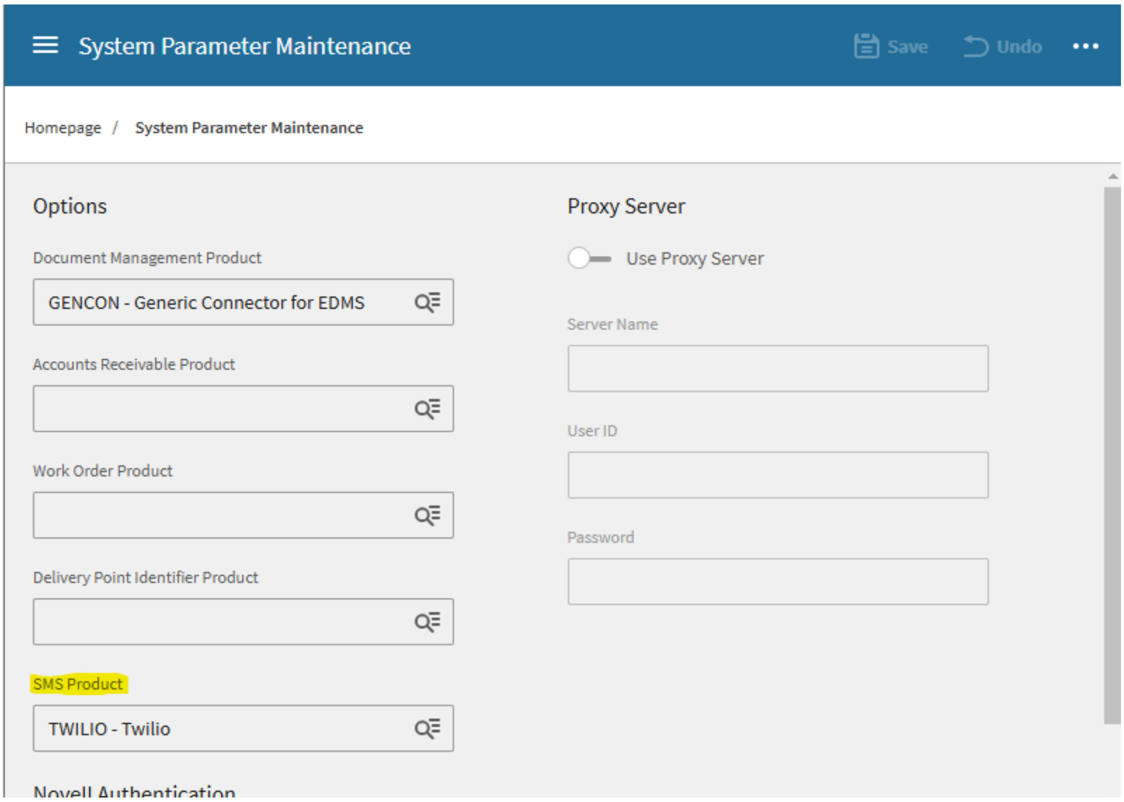


Figure 3

SMS History (System Administration >> Integration >> SMS)
SMS History enables access to the history of SMS notifications that have been sent (or at least attempted to have been sent). The profile parameters allow a search to be defined that can include a date range, the delivery status of the notification, the originating application, and the destination mobile number.

SMS Message Details shows the following details:
- Date/time the notification was submitted
- Delivery Status:
  - Pending - queued; not yet sent to the SMS provider
  - Sent - sent to the SMS provider for delivery
  - Delivered - confirmed to have been delivered by the SMS provider
  - Failed
  - Unknown.
- Application
- Notification Type
- Template
- The notification text.

For notifications that did not successfully send, a Resend button will be displayed to allow the notification to be re-submitted. Note that re-sending a notification will result in a new history record being created; the existing history record is not updated.

The SMS History for specific records is also accessible directly from the Customer Service, Licence and Application Summary Forms >> Options >> SMS History. In Applications and Licensing, the SMS History will only appear if it's assigned to the class and responsibility groups first, via Applications >> Application Classes or Licensing >> Licensing Classes.

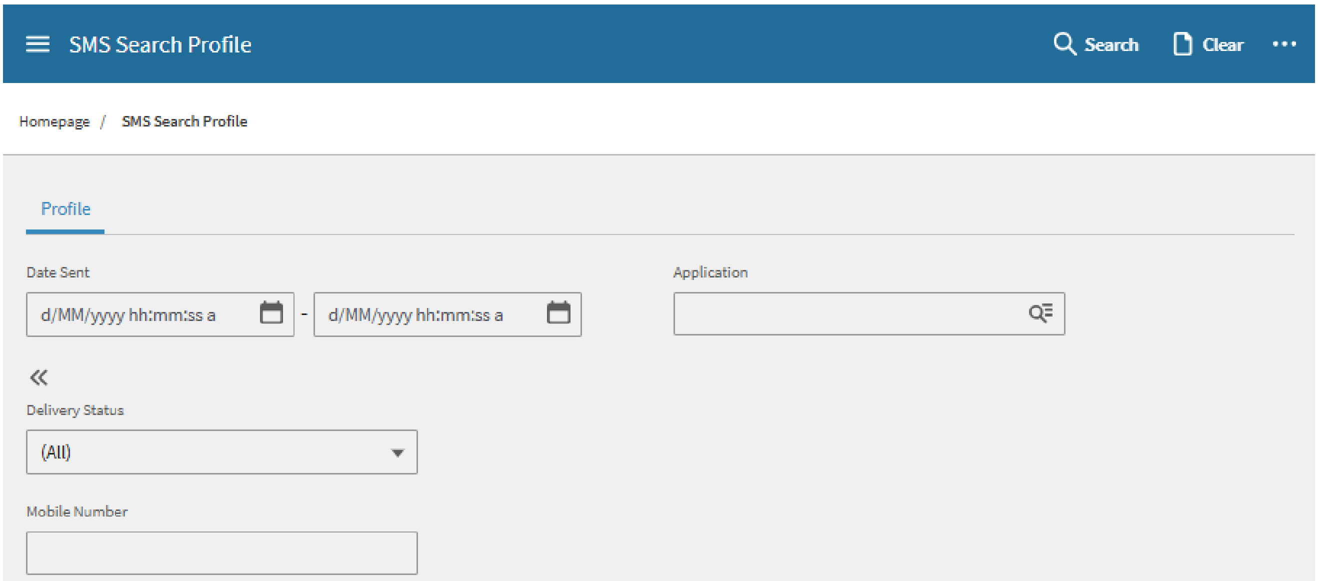


Figure 4

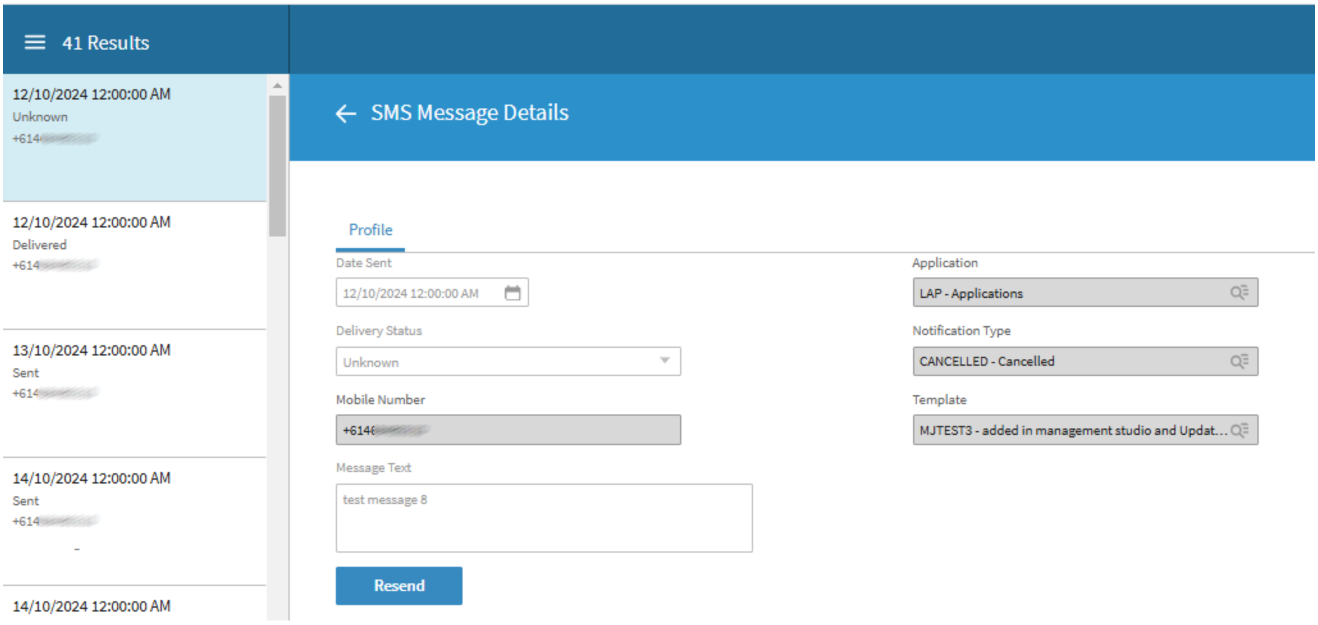


Figure 5

Twilio SMS Provider Integration
An integration with communications provider Twilio has been developed that can be used by the Business Event Notifications SMS Authorised Function. Customers will need to arrange access to a Twilio account and sending phone number that supports SMS messaging.

The following details will be required when configuring Twilio as an SMS Provider:
- Account SID
- Auth Token
- Phone Number.

System Administration >> Integration >> SMS >> SMS Provider Maintenance - when configuring a Twilio SMS Provider, the following parameters are used:
- Provider Code: TWILIO
- Provider Name: Twilio
- Description: Twilio Programmable Messaging
- API Endpoint:

  - Endpoint Name: Twilio
  - Description: Twilio Programmable Messaging
  - Endpoint URL: https://api.twilio.com
  - Icon: (Twilio Icon)
  - Authentication Type: Basic
  - User ID: <Twilio Account SID>
  - Password: <Twilio Auth Token>
- Active: Yes.

System Administration >> Integration >> API Endpoints >> API Endpoint Maintenance.
When configuring the API Endpoint for Twilio, the following parameters are used:
- SMS Product Configuration:
  - Name: FROM
    Value: <Twilio Phone Number>
  - Name: DEFAULTCOUNTRYCODE Value: 61 or 64 for NZ.

NOTE: Twilio provides access to a set of Test credentials and a Test phone number that can be used for non-production testing. When the test credentials are specified, Twilio accepts requests to send SMS notifications but will not forward them to a carrier, so they will not be delivered and incur no charges.
NOTE: To use Test credentials a specific sending (from) number must be used. More details: https://www.twilio.com/docs/iam/test-credentials.

Telephone Number Format
Twilio will only accept destination telephone numbers in E.164 format e.g. +61400123456. The Twilio integration has the capability to analyse and if necessary, transform telephone numbers into E.164 format by looking at the first few characters and if appropriate using a default country code.

The rules that govern how numbers are modified are as follows:
- Spaces, hyphens or round parentheses are always removed from the number
- Numbers beginning with '+' are used without further modification.

If a default country code of 61 or 64 has been defined in the SMS provider parameters:
- Numbers beginning with the international call prefix e.g. 0011 will have that prefix replaced with '+'
- Numbers beginning with the local call prefix e.g. 0 will have that prefix replaced with '+<default country code>'.

If any other default country code has been defined in the SMS provider parameters:
- Numbers beginning with the default international call prefix 00 will have that prefix replaced with '+'
- Numbers beginning with the default local call prefix 0 will have that prefix replaced with '+<default country code>'.

Numbers that have not matched any of the previous rules are assumed to be local numbers with a missing local call prefix and will have +<default country code> added.

NOTE: This function will be available only to sites who have the required authority. Contact your Account Manager if your site requires this function.

Environment Information

Case: WODO CS0309486	Work Item: 64411
UX Client	ERS:

ENVIRONMENT INFORMATION

The Pathway UX Presentation server contains environmental information that is read when the server first starts. If there is an issue, such as a bad network connection, this information may not be correct.

The process has been altered, so that the values are retrieved again without a UX user needing to clear the Pathway UX cache.

ION Parameters

Case UX Client	Work Item: 65172 ERS:

ION PARAMETER MAINTENANCE

A new PathwayInspection ION noun and BODs to support lodgement from the NSW Department of Planning, Housing and Infrastructure have been implemented.

Refer to the PathwayInspection.pdf document in the ION folder for details.

The new outbound from Pathway BODs:
Sync.PathwayInspection and Acknowledge.PathwayInspection.

The new inbound to Pathway BOD:
Process.PathwayInspection.

ION Deployment (Optional)
The ION system will not be aware of the PathwayInspection noun schema definition until an Object Schemas import is performed within the ION environment.

Please note that schemas have only been provided for ION Cloud Edition deployments.

For ION Cloud Edition deployments perform an Object Schemas import of the ../ion/Pathway_BOD_Library_CE_2024.11.00.zip file.

Pathway Configuration (Optional)
For sites requiring integration with the NSW Department of Planning, Housing and Infrastructure:

- In System Administration >> System Parameters >> ION Parameters, go into ION Noun Maintenance and ensure that the PathwayInspection noun is activated. Actually changing the Active flag requires the SCASYS user profile.
- Again, in ION Parameters, go into Custom Area Maintenance and ensure that the LastModificationPersonnel custom area for the Sync.PathwayInspection BOD type has been activated.
- Once more, in ION Parameters, go into Business Object Maintenance and create a new Business Object Definition entry for entity LININSP with relevant events for DPIE (DPHI) integration. Please refer to the appropriate DPIE integration release documentation for further information.

Applications

Business Event Notifications and SMS Notifications Integration

Case: UX Client	Work Item: 63475 ERS: 108363

APPLICATIONS

***** Authorised Function *****

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

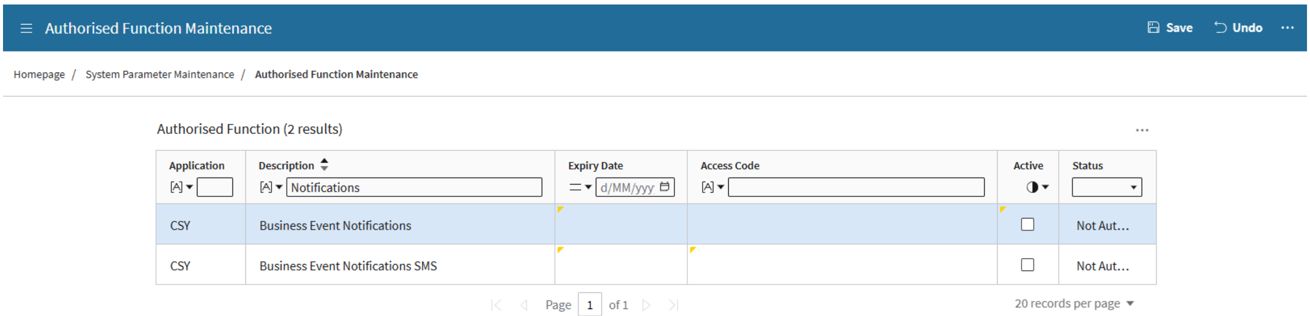


Figure 1

The existing Pathway Authorised Function, Business Event Notifications, has been expanded to allow notifications from Applications. Business Event Notifications are used to automatically send system-generated email notifications. Emails may be addressed to customers or other stakeholders with a Name Role in the NAR or ad hoc email addresses, e.g. stored in the References entity of the Application record. This functionality facilitates notifications of changes to Application records to interested parties e.g. a change to the status of an application.

A new Pathway Authorised Function, Business Event Notifications SMS, has been developed to automatically send system-generated SMS notifications to a mobile phone number. SMS notifications may be sent to customers with a Name Role in the NAR. Like email notifications, SMS notifications facilitate notifications of creation and changes to Application records to interested parties, e.g., new application, a change to the status of an application.

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

Before the Notifications option can be accessed it must be first be assigned to individual application classes (Applications >> Application Classes >> [Class] >> Class Authorities option) and to a responsibility group within the class's responsibility structure (Applications >> Application Classes >> Class >> Group Authorities option).

There are several configuration elements which are outlined below:

- System Administration >> Integration >> API Endpoints >> API Endpoint Maintenance – set up the API endpoint for the SMS provider. At present, the only supported provider is Twilio.
- System Administration >> Integration >> SMS >> SMS Provider Maintenance – set up the SMS provider account details and configuration information.
- Systems Administration > System Parameter Maintenance System Administration >> Integration >> System Parameter Maintenance - selection of an active SMS provider.
- System Administration >> System Parameters >> ION Parameters – where the Auto Publish Application and Licence Notifications business object definition and its event triggers are defined.

- Applications >> Application Parameters >> Notifications >> Data Transformer Maintenance – set up more advanced criteria and filtering using eXtensible Stylesheet Language Transformations (XSLT). This is optional.
- Applications >> Application Parameters >> Notifications >> E-mail Template Maintenance – set up the email templates using plain text, HTML or data transformer data.
- Applications >> Application Parameters >> Notifications >> SMS Template Maintenance – set up the SMS templates using plain text or text data transformer data.
- Applications >> Application Parameters >> Notifications >> Notification Type Maintenance – set up the types of notifications required.

ION Noun Verb Maintenance

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

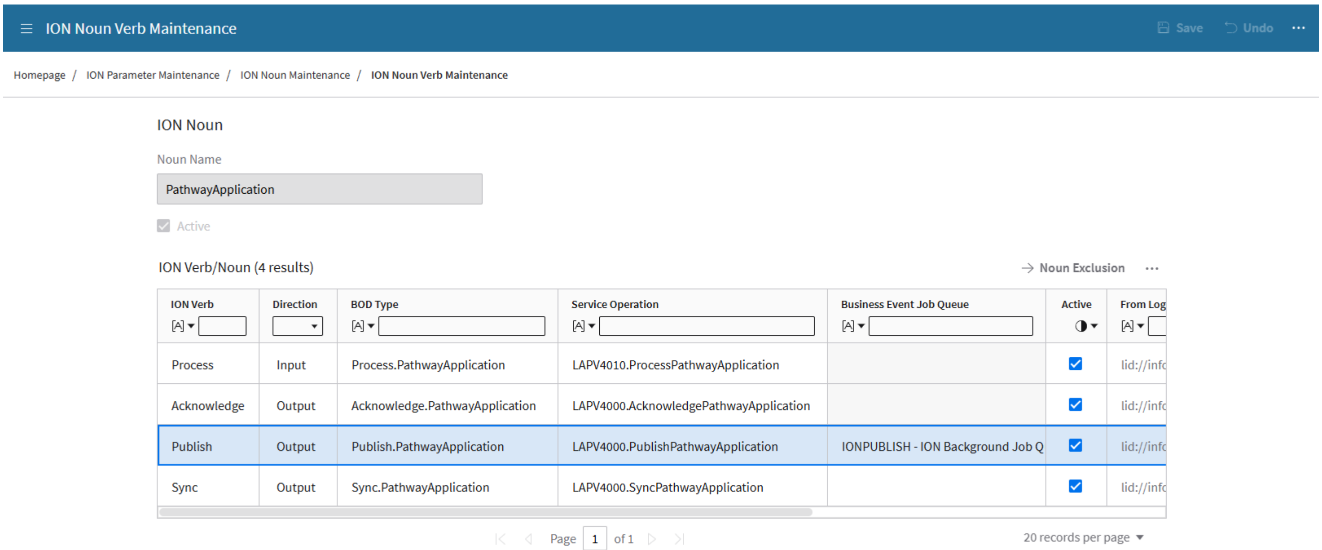


Figure 2

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

- Extract e-mail addresses from application data for e-mail notification delivery.
- Extract mobile phone number from application data for SMS notification delivery.
- Provide filtering data to control notification triggering.
- Extract Pathway merge data for notification message content.

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

Business Object Definition Maintenance

Business Object Definition Maintenance is accessible from the System Administration >> System Parameters >> ION Parameters menu option and is used to define the conditions under which the Publish verb's service operation will be triggered. The release upgrade sets up a default business object definition, labelled Auto Publish Application and Licence Notifications, for this purpose.

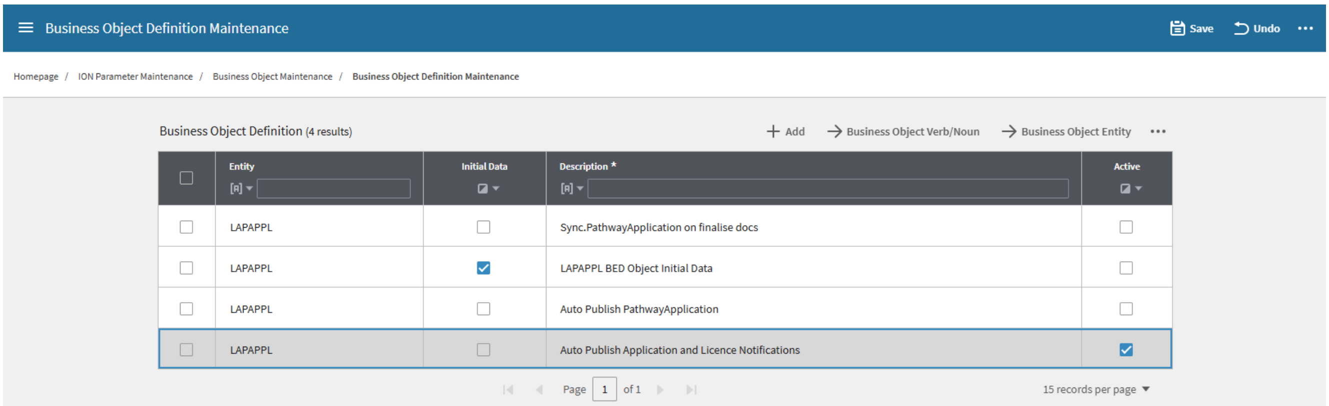


Figure 3

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

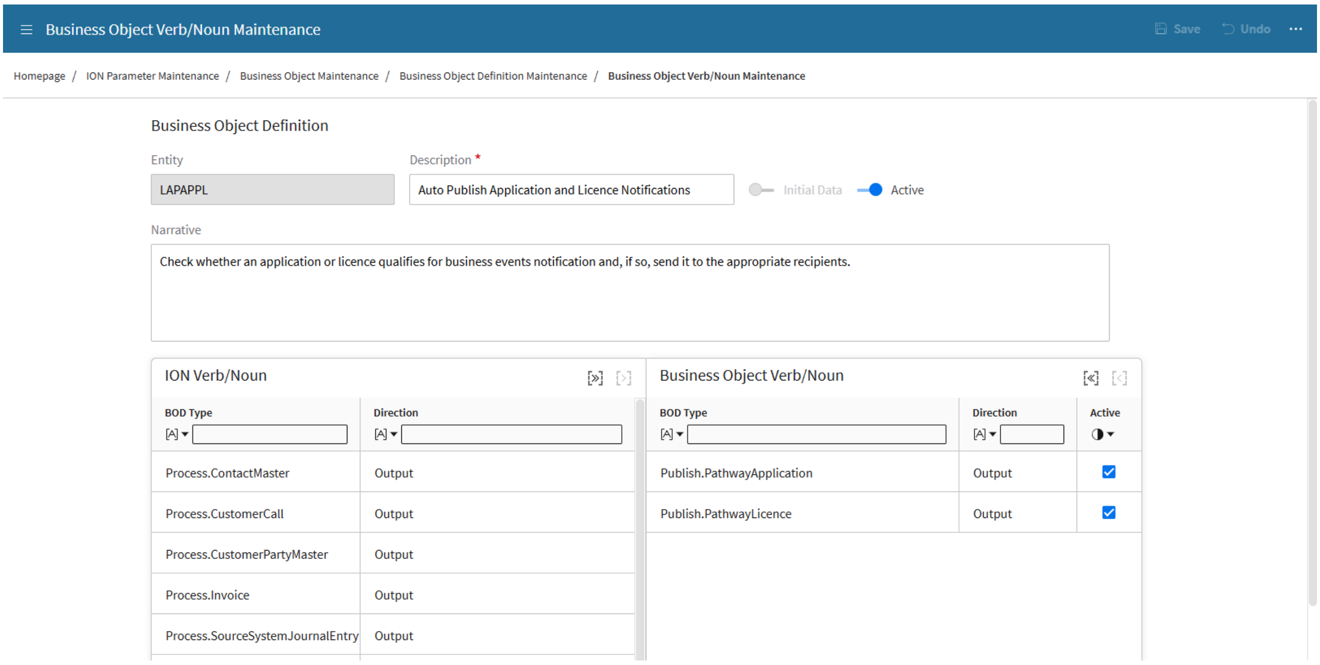


Figure 4

Generally, the Auto Publish Application and Licence Notifications service operation should be activated when events such as application creation and status updates occur.

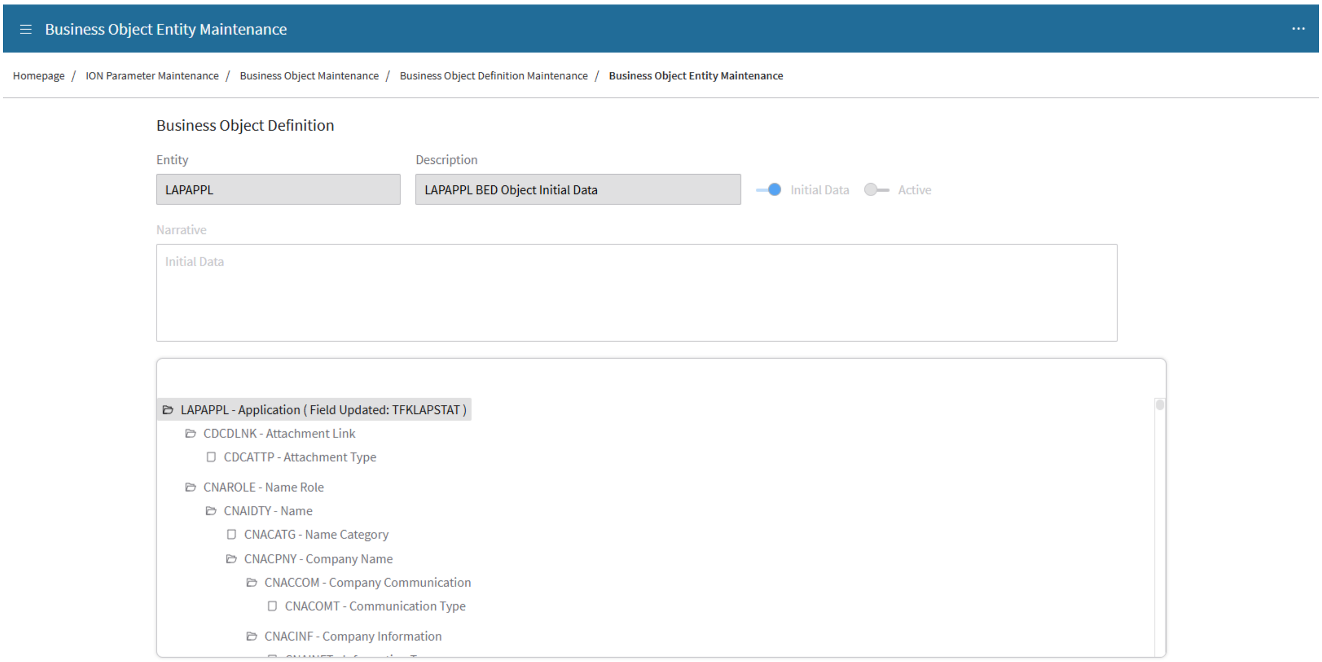


Figure 5

NOTE: The triggering of the Publish.PathwayApplication service operation does not necessarily mean that Business Event Notification processing will take place immediately. For example, if no contact details are found on the application, no further processing will be undertaken. Instead, another job will be submitted to the business event job queue so that the application can be checked again later. Attempts to send an email or SMS will be made for up to three days if initially unsuccessful.

Deploy Business Events

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

Application Notification Parameters

A new Notifications option has been added to Application Parameters. Before the Notification option can be accessed it must first be assigned within the Applications >> Application Classes >> Class >> Class Authorities and Group Authorities options.

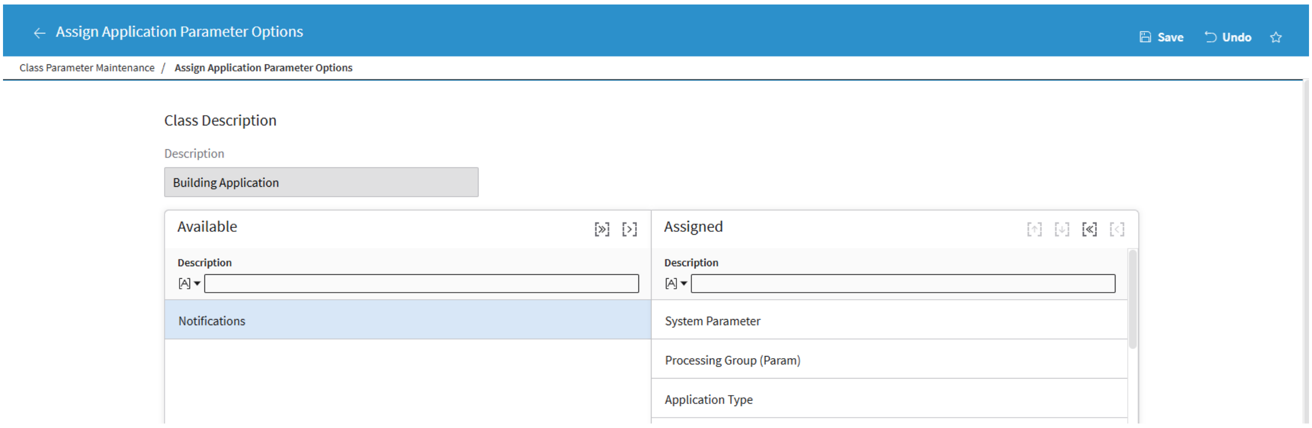


Figure 6

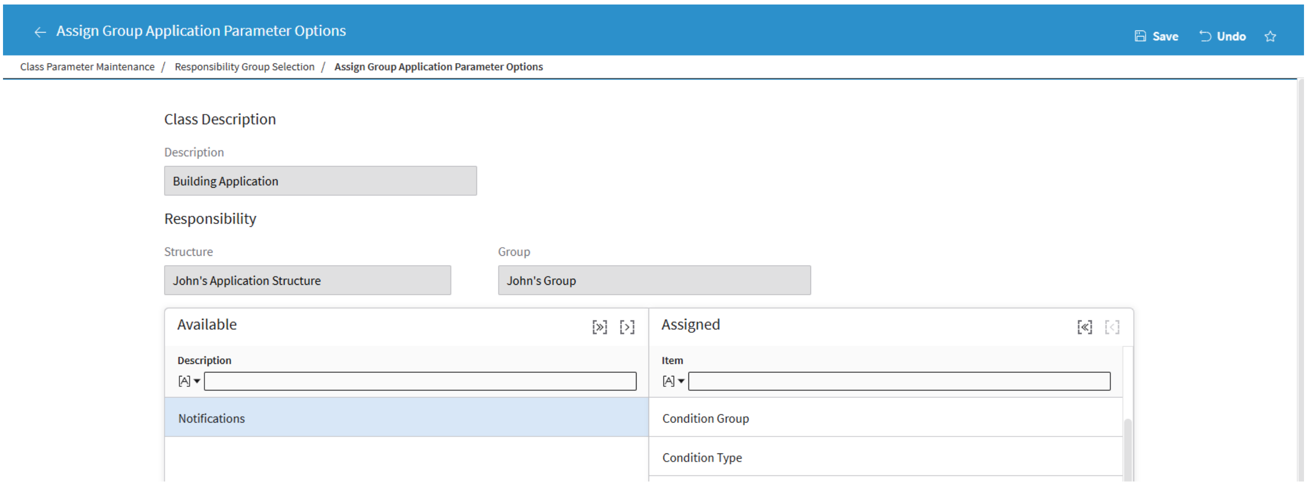


Figure 7

Once that's done, the Notifications option will appear in the Applications >> Application Parameters for the selected application class.

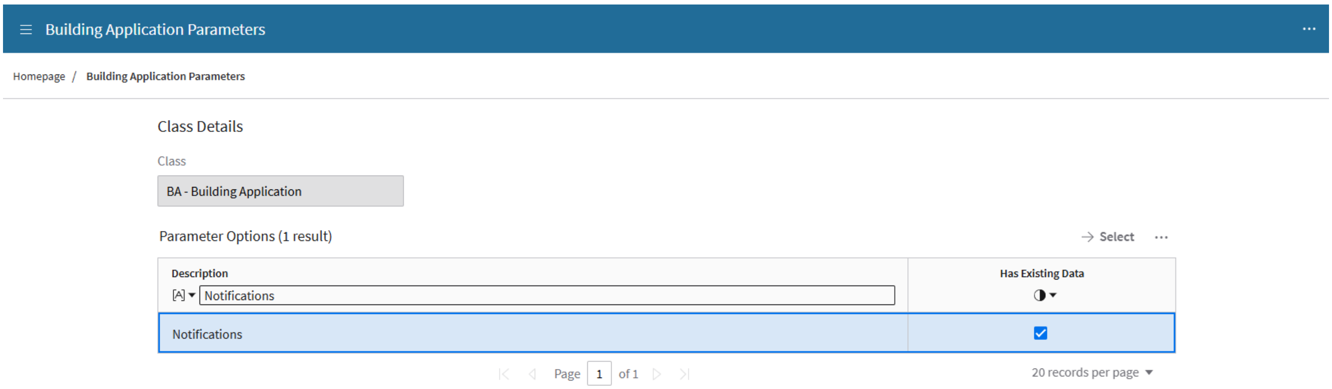


Figure 8

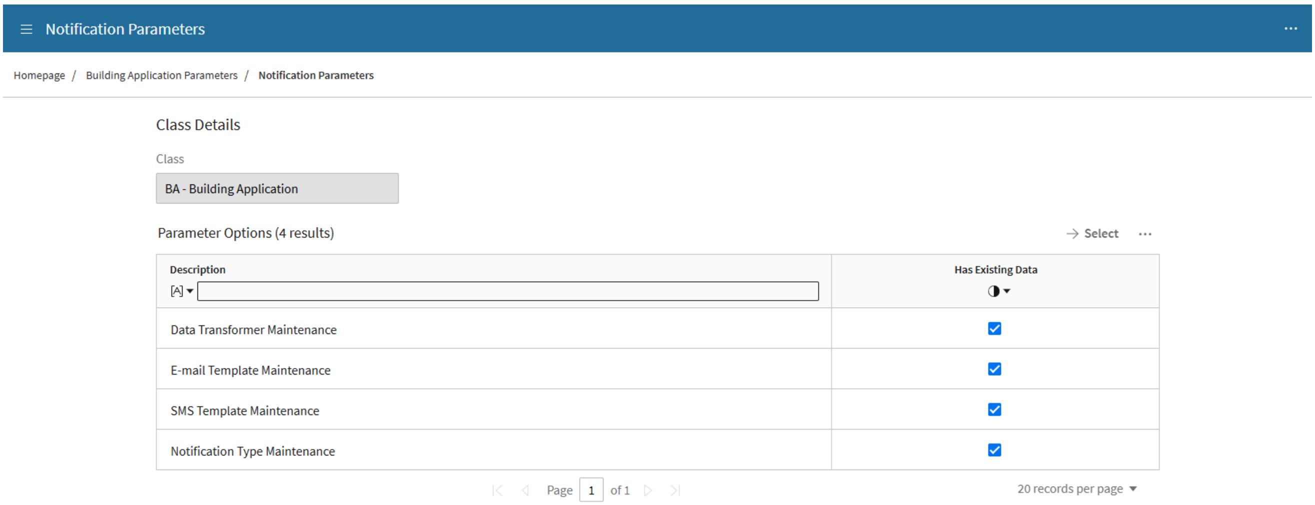


Figure 9

Data Transformer Maintenance
Data Transformer Maintenance allows customer sites to define transformations in eXtensible Stylesheet Language (XSL) to be applied to PathwayApplication ION noun data. In turn, this enables the construction of sophisticated HTML and plain text message templates and allows advanced filtering when checking whether a notification should be sent at all. The version of XSLT (XSL Transformations) used is 1.0, as that is what is available with the .NET Framework.

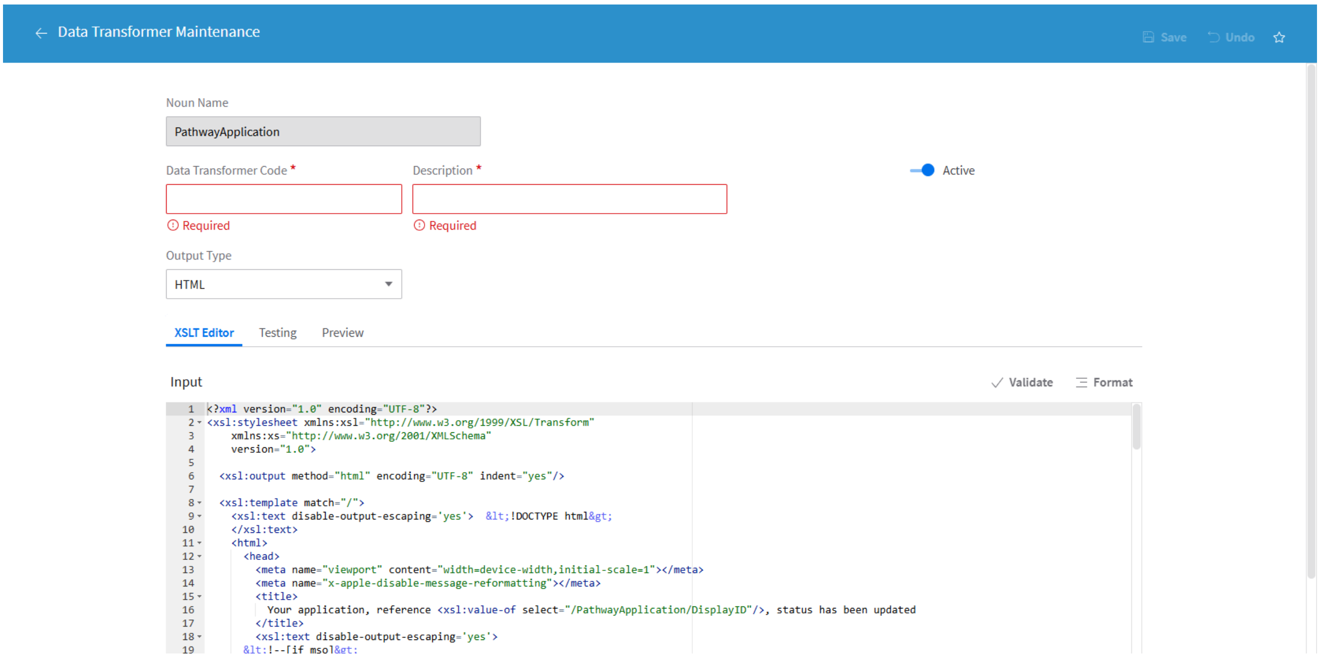


Figure 10

Noun Name
This is the business object to which the data transformer applies.

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

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

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

Output Type
A drop-down that indicates the format in which the XSLT will output converted PathwayApplication XML data. The allowed values are:

- Contacts – the output will be an XML list of contact details extracted from the Business Object Definition (BOD), conforming to the following schema:

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

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

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

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

Testing
This tab provides a dual panel, divided by a splitter control, for testing the transformation coded in the XSLT Editor tab. Again, it reflects the design of the corresponding mapping editor tab in ION Desk, Figure 11.

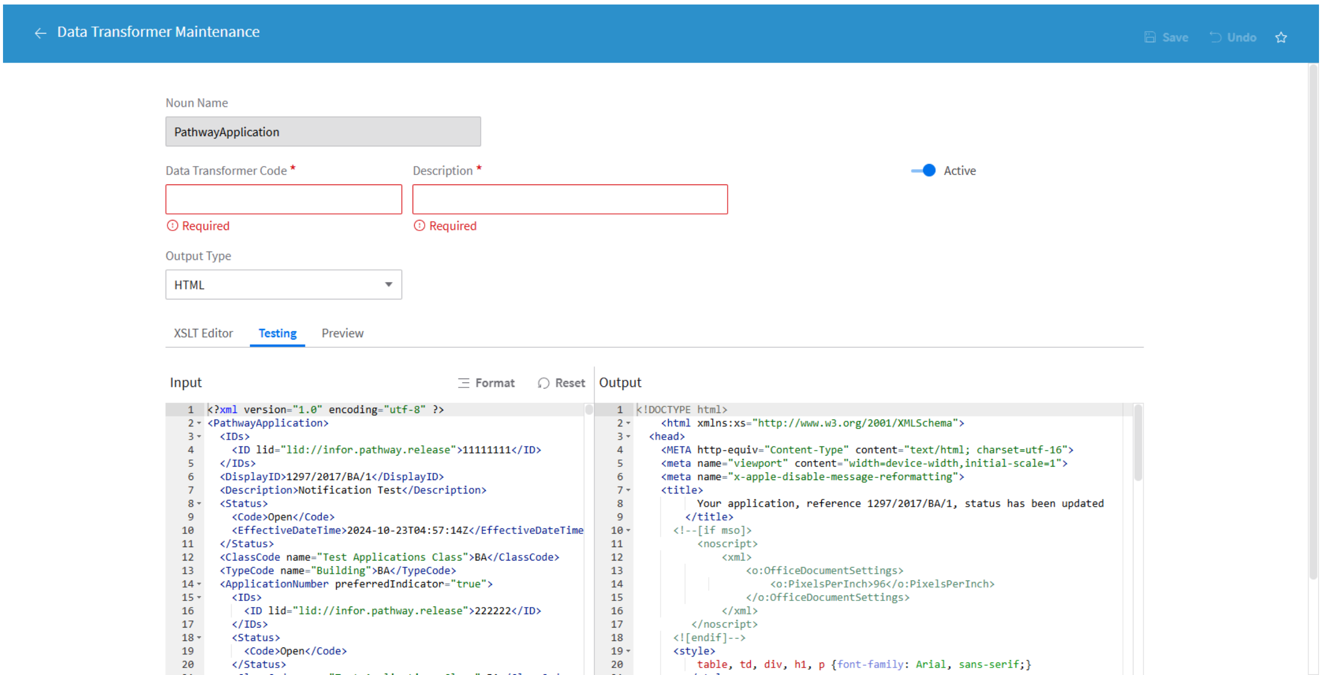


Figure 11

In Figure 11, on the left side, Input, a sample PathwayApplication XML document is displayed formatted and highlighted in an editor control. On the right side, Output, the result of applying the XSLT to the sample XML is displayed, also formatted and highlighted, where applicable, in an editor control.

Whenever the user changes the Input value, the transformation is automatically applied to it to produce an updated Output value. For new data transformers, the left side is initialised with a default PathwayApplication document. Any changes made to the sample XML are retained when the data transformer is saved. The button above the editor processes the Input XML. Format – indents the XML code as per conventions.

Preview

This tab applies when the Output Type field value is HTML. If selected, an inline frame within the tab renders the current HTML code in the Testing tab's Output panel editor, showing the user what an e-mail based on the data transformer would look like Figure 12.

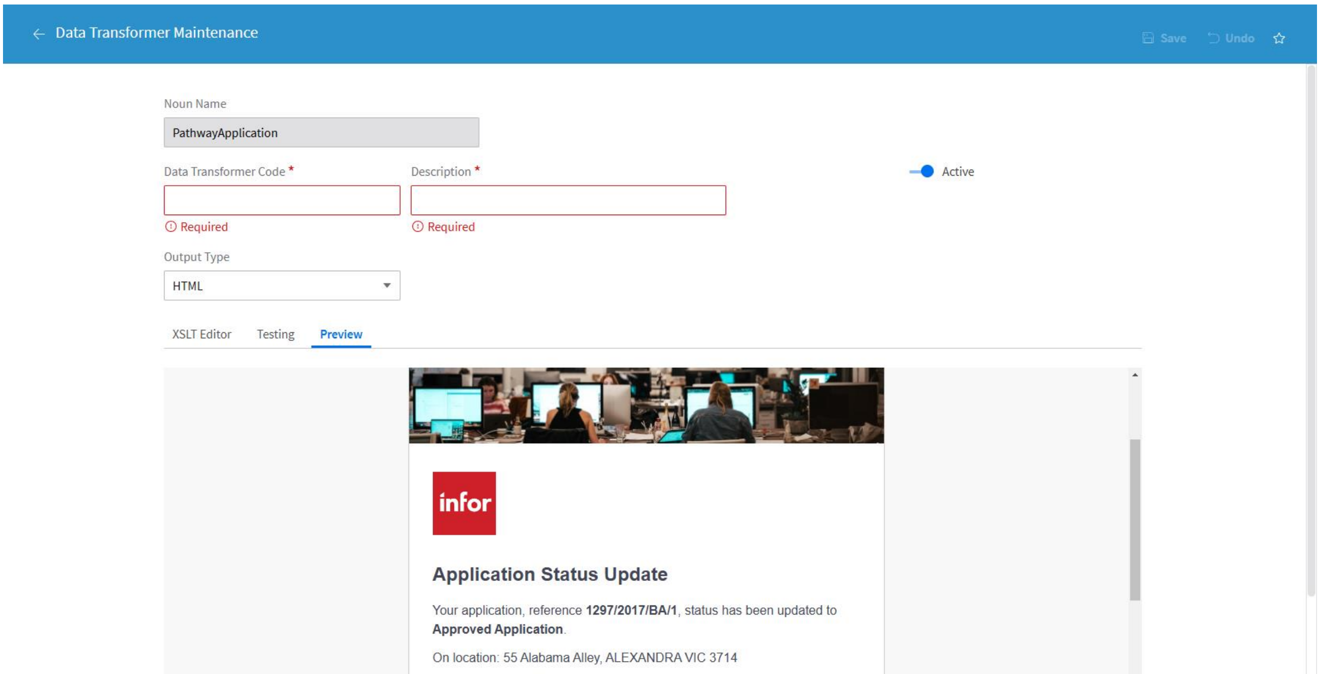


Figure 12

E-mail Template Maintenance
E-mail Template Maintenance allows customer sites to define an e-mail template to be associated with the PathwayApplication noun. The e-mail template will be used to construct the e-mail notifications sent to the contact.

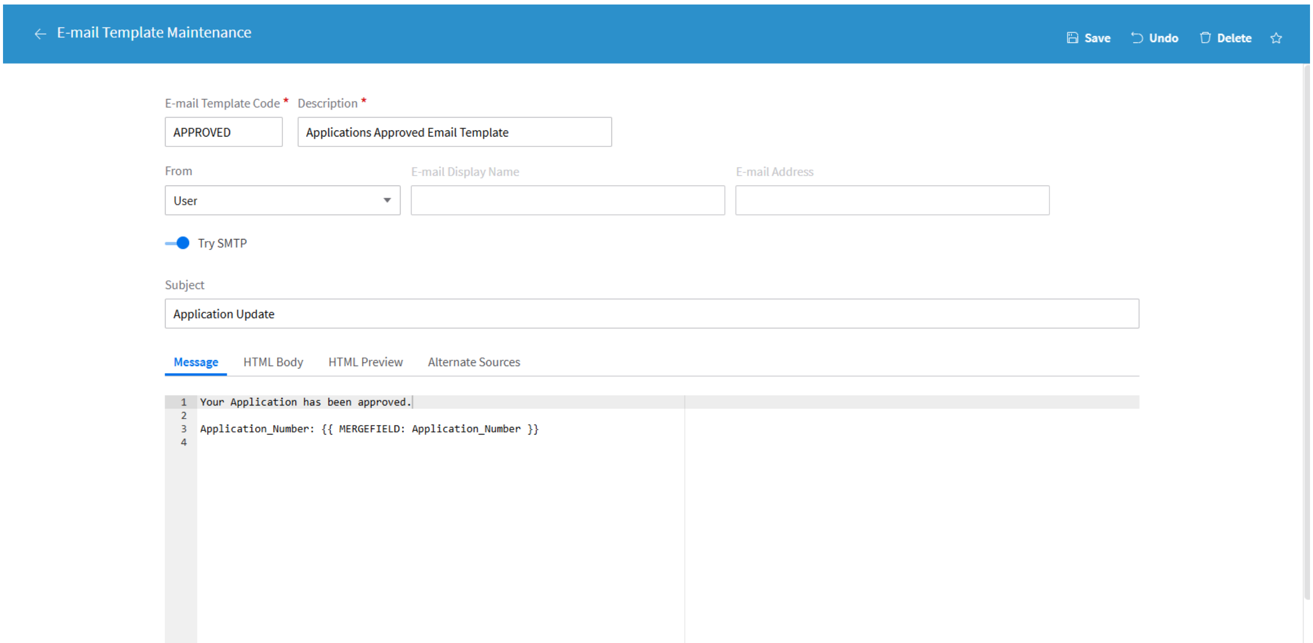


Figure 13

E-mail Template Code
A unique alphanumeric value of up to ten characters identifying the template.

Description

Up to fifty mixed-case characters further describing the e-mail template.

From
This drop-down field identifies the source of the sender's name and address to be associated with all messages based on the template and sent via SMTP. The possible values are:

- Administrator – The sender's name and address are taken from the mail server administrator E-mail Display Name and E-mail Address field values in the System Administration >> System Parameters >> Mail and Fax Server Maintenance menu option.
- Other – The sender's name and address are taken from the E-mail Display Name and E-mail Address field values against the e-mail template.
- User – The sender's name and address are taken from the Pathway user record of the user initiating the process that sends the message.

E-mail Display Name
A human-friendly name that identifies the message sender e.g. Jane Smith. This field is only available when the From field is Other.

E-mail Address
The message sender's address in SMTP format e.g. jane.smith@council.gov.au. This field is only available when the From field is Other.

Try SMTP
Specifies that the E-mailing module should always attempt to send messages based on the template via SMTP rather than MAPI. This allows a particular From address to be specified on plain text messages. Otherwise, messages are only sent via SMTP if an HTML Body value is provided. If sending the message via SMTP fails for some reason, an attempt is still made to send it via a MAPI client e.g. Outlook. However, in this case, the From address will always be that of the user logged on to the MAPI client.

Subject
The e-mail subject text to use in messages based on the template. The text can include merge fields for incorporating Pathway data in messages at the time of sending, as detailed later.

Message
The plain body text to use in messages based on the template. As with the subject field, this can include merge fields for incorporating Pathway data in messages at the time of sending.

The Message field can accommodate an ample number of characters for an e-mail message body, with letters allowed in mixed case. The message length is effectively unlimited.

When the right-click menu is displayed while the Subject or Message field has focus, a list of available merge fields is displayed.

Selecting a merge field right-click menu option inserts the {{ MERGEFIELD: <fieldname> }} in the position of the cursor within the field with focus.

HTML Body
HTML code defining a rich text body to use in messages based on the template. The text can include the previously mentioned merge fields and image fields for incorporating embedded images, as detailed later.

The HTML Body field can accommodate an ample number of characters for an HTML e-mail message body, with letters allowed in mixed case. (The message length is effectively unlimited).

When the right-click menu is displayed while the HTML Body field has focus, a list of available merge fields is displayed.

Selecting a merge field right-click menu option inserts the {{ MERGEFIELD: <fieldname> }} in the position of the cursor within the field with focus.

When the right-click menu is displayed, while the HTML Body field has focus, there is an additional "Insert image…" option.

Selecting the "Insert image…" option displays the Open dialog (allowing selection of an image file to encode and insert). The allowed file extensions are JPG, JPEG, GIF, PNG, BMP and "*" i.e. all files.

To inset an image in the HTML Body field, add <img src=""> then place your cursor inside the double quotes. Access the right-click menu, select Insert Image then choose an image file. The file data will be inserted into the field in base64 encoding.

HTML Preview
This tab applies when an HTML Body has been specified. If selected, an inline frame within the tab renders the current HTML code in the Testing tab's Output panel editor, showing the user what an e-mail based on the HTML Body would look like.

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

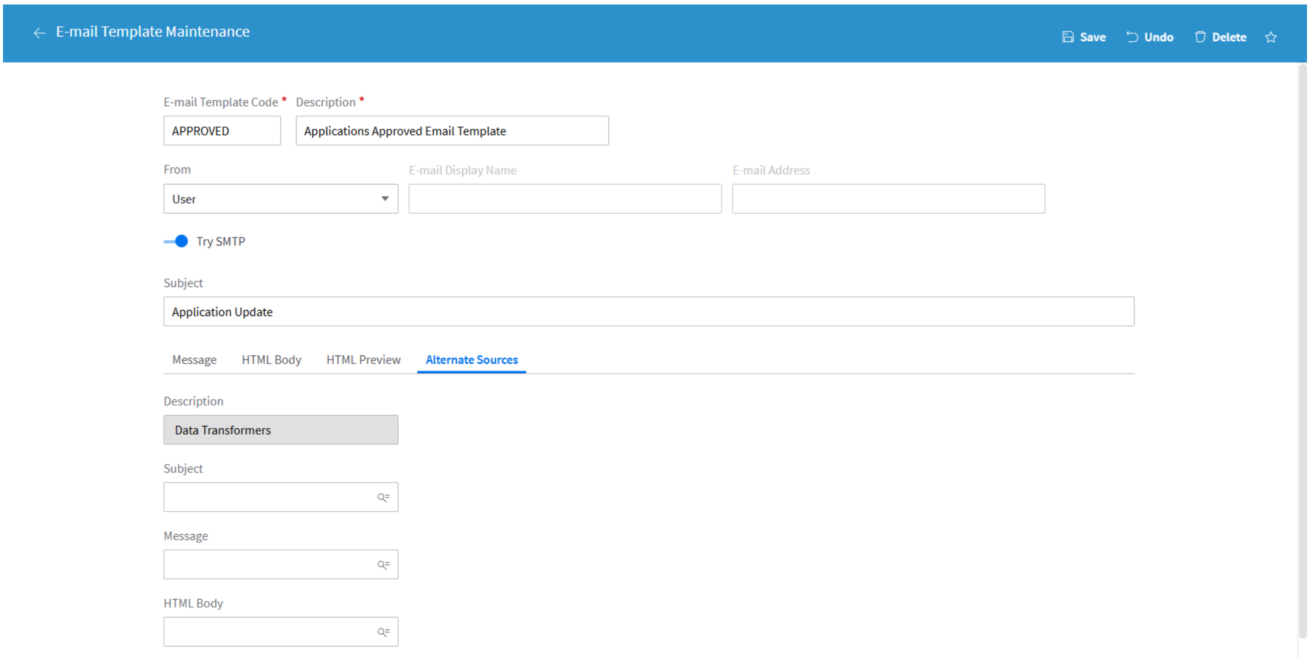


Figure 14

SMS Template Maintenance
SMS Template Maintenance enables customer sites to define an SMS template to be associated with the PathwayApplication noun. The SMS template will be used to construct the SMS notifications sent to the contact.

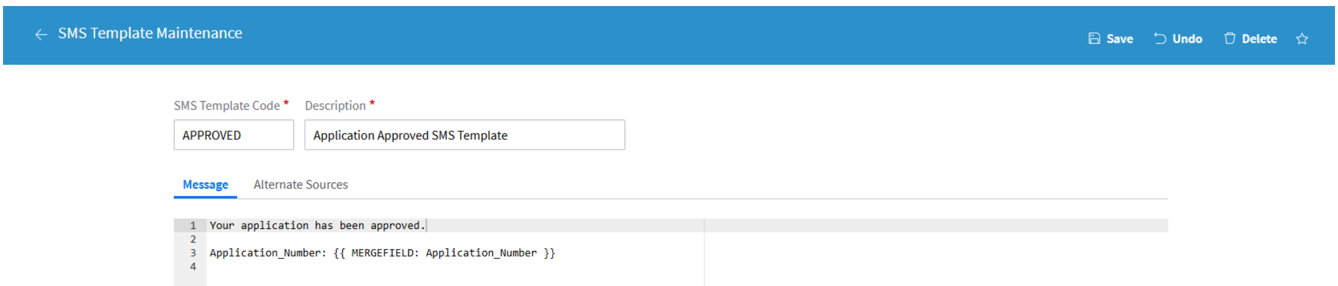


Figure 15

SMS Template Code

A unique alphanumeric value of up to ten characters identifying the template.

Description
Up to fifty mixed-case characters further describing the e-mail template.

Message
The plain body text to use in messages based on the template. This can include merge fields for incorporating Pathway data in messages at the time of sending.

The Message field can accommodate an ample number of characters for an e-mail message body, with letters allowed in mixed case. The message length is effectively unlimited.

When the right-click menu is displayed while the Subject or Message field has focus, a list of available merge fields is displayed.

Selecting a merge field right-click menu option inserts the {{ MERGEFIELD: <fieldname> }} in the position of the cursor within the field with focus.

Alternate Sources
Where the message Alternate source field has been specified, the value supplied by the alternate message data source will override whatever has been generated for the standard message template field. The Alternate Sources Message field will only allow text based data transformer selections because an SMS can only allow plain text.

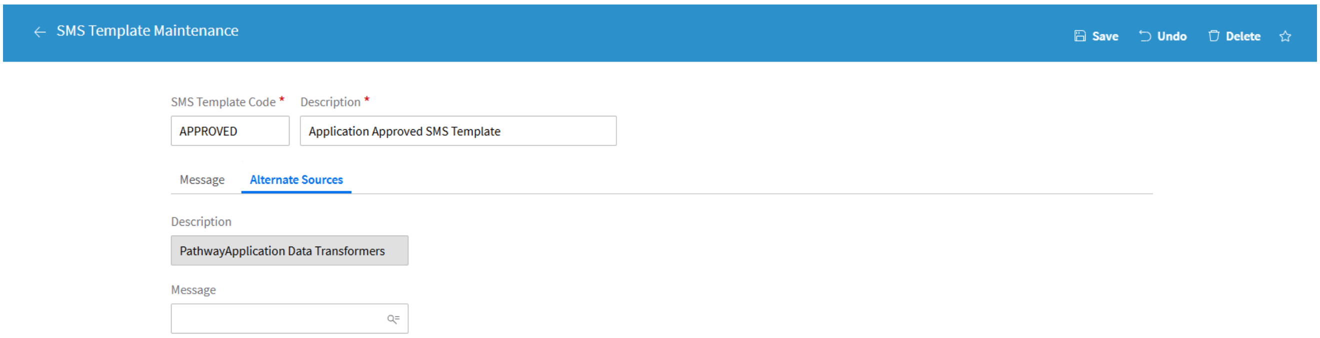


Figure 16

Notification Type Maintenance
Notification Type Maintenance allows the definition of an ordered list of PathwayApplication notification types to check when events defined in Business Object Entity Maintenance trigger the Publish verb's service operation. If the Publish verb is cleared for processing for a given application, each notification type in the list will be checked in order and, if the filter criteria are met, an e-mail message, or SMS message, or both will be sent to each relevant contact.

All e-mail messages sent are available for enquiry in both the System Administration >> System Parameters >> E-mail Message Enquiry menu option and the Applications >> Application Maintenance >> E-mail History summary option for the relevant application.

All SMS messages sent are available for enquiry in both the System Administration >> Integration >> SMS >> SMS History menu option and the Applications >> Application Maintenance/Enquiry >> SMS History summary form option for the relevant application.

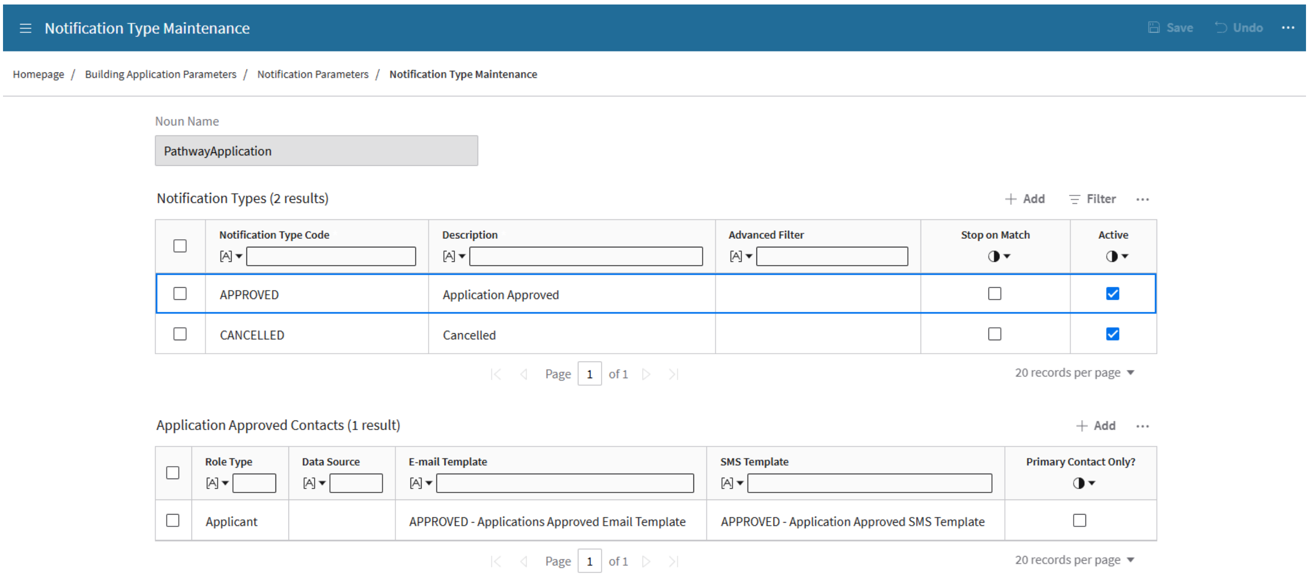


Figure 17

Noun Name
This is the business object to which the data transformer applies.

Notification Types
This holds basic information about each Notification Type. Rows can be ordered using the Up and Down buttons in the selection toolbar and the sequence determines which Notification Types are considered first when processing the Publish verb.

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

Contacts
This grid applies to the currently selected notification type. It associates Application contacts with e-mail templates that determine the layout and content of the messages the contacts will receive for the notification type:
- Name Role Type – one of the Name and Address Register role types listed within Applications >> Application Parameters >> Name Role. At notification time, if the name role type doesn't apply to the application type for the relevant application it is ignored.
- Data Source – a data transformer (see the Data Transformer Maintenance section) with an Output Type value of Contacts that provides contact e-mail addresses from the ION noun for the Publish verb. Either this or Name Role Type will be required, but not both.
- E-mail Template – the e-mail template definition that determines the layout and content of the contact's notification message.
- SMS Template – the SMS template definition that determines the layout and content of the contact's notification message. This field will only appear if the Business Event Notifications SMS Authorised Function is on.
- Primary Contact Only? – if set, indicates that only the first contact in a possible list of contacts for the name role type or data source will be sent the notification message. If the first contact has no e-mail address, the next contact in the list, if any, is sent the message.

Notification Types Filter button
On Notification Types, the Filter button applies to the currently selected notification type allowing filtering criteria to be specified that determines whether the application for which the Publish verb is being processed should trigger a notification.

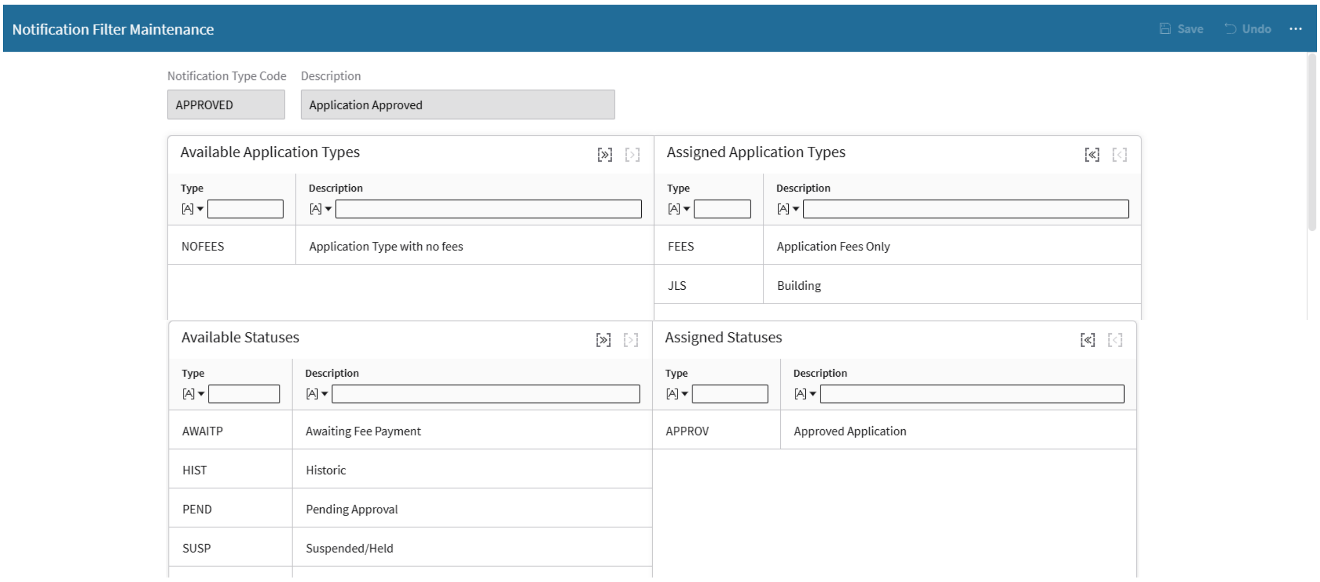


Figure 18

- Application Types – a swap-list that allows selection of application types to which the notification message/s should apply. If no application types are selected, it is assumed that the notification applies to all types.
- Application Statuses – a swap-list that allows selection of application statuses to which the notification message/s should apply. If no application statuses are selected, it is assumed that the notification applies to all statuses.

SMS History
All SMS messages sent are available for enquiry in both:
- System Administration >> Integration >> SMS >> SMS History menu option.
- Applications >> Application Maintenance/Enquiry >> (Application Class) >> (Application) >> Options >> SMS History.

The SMS History menu option allows access to the log of SMS notifications that have been sent, or at least attempted to have been sent. The profile parameters allow a search to be defined that can include a data range, the delivery status of the notification, the originating application, and the destination mobile number.

Before the SMS History option can be accessed it must be first be assigned to individual application classes via Applications >> Application Classes >> Class >> Class Maintenance / Enquiry option) and to a responsibility group within the class's responsibility structure via Applications >> Application Classes >> Class >>Group Maintenance / Enquiry option.

Selecting the SMS History option from an Application Summary will open an instance of the SMS History search that is pre-filtered to the specific application.

SMS Message Details shows the following details:
- Date/time the notification was submitted
- Delivery Status:
  - Pending - queued; not yet sent to the SMS provider
  - Sent - sent to the SMS provider for delivery
  - Delivered - confirmed to have been delivered by the SMS provider
  - Failed
  - Unknown

- Application
- Notification Type
- Template
- The notification text.

For notifications that did not successfully send, a Resend button will be displayed to allow the notification to be re-submitted.
NOTE: Re-sending a notification will result in a new history record being created; the existing history record is not updated.

NOTE: This function will be available only to sites who have the required authority. Contact your Account Manager if your site requires this new functionality.

Application Maintenance

Case: TOOW CS0491976, MORE CS0506918 DUNE CS0519899	Work Item: 65139
UX Client	ERS:

NAMES MAINTENANCE

Letter - Send button is now available when:
1. The User Account has been assigned Names Maintenance or
2. The User Account has not been assigned Names Maintenance but has been assigned Allow Send Letter when not authorised to Name Mnt.

Application Maintenance

Case:	Work Item: 65236
UX Client	ERS:

APPLICATION FEES MAINTENANCE

A correction has been made to Application Fees Maintenance when transferring one or more credits to Debtors. Previously, selecting the Debtors Transaction Generation option did nothing when there were only credits (no invoices) to transfer to Debtors.

Customer Service

SMS Notifications Integration

Case: UX Client	Work Item: 63475 ERS: 108363

CUSTOMER SERVICE

***** Authorised Function *****

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

The existing Pathway Authorised Function, Business Event Notifications (BEN), has been extended with a new Pathway Authorised Function, Business Event Notifications SMS, that will allow SMS notifications to be sent to customers alongside the existing email notifications.

Business Event Notifications SMS, has been developed to automatically send system generated SMS notifications to a mobile phone number. SMS notifications may be sent to customers with a Name Role in the NAR. Like email notifications, SMS notifications facilitate notifications of creation and changes to Customer Request records to interested parties e.g. new request, a change to the status of a customer request.

This SMS functionality has been developed for Pathway UX and makes use of Pathway's ION-related framework; however, it does not recognise or require a software licence for Infor OS (ION). For example, it makes use of:

- The Publish verb against the CustomerCall noun within ION Noun Verb Maintenance, Figure 1.
- The Auto Publish CustomerCall ACRREQU Business Object Definition and it's related Verb/Nouns and Entities within ION Business Object Definition Maintenance, Figures 2.

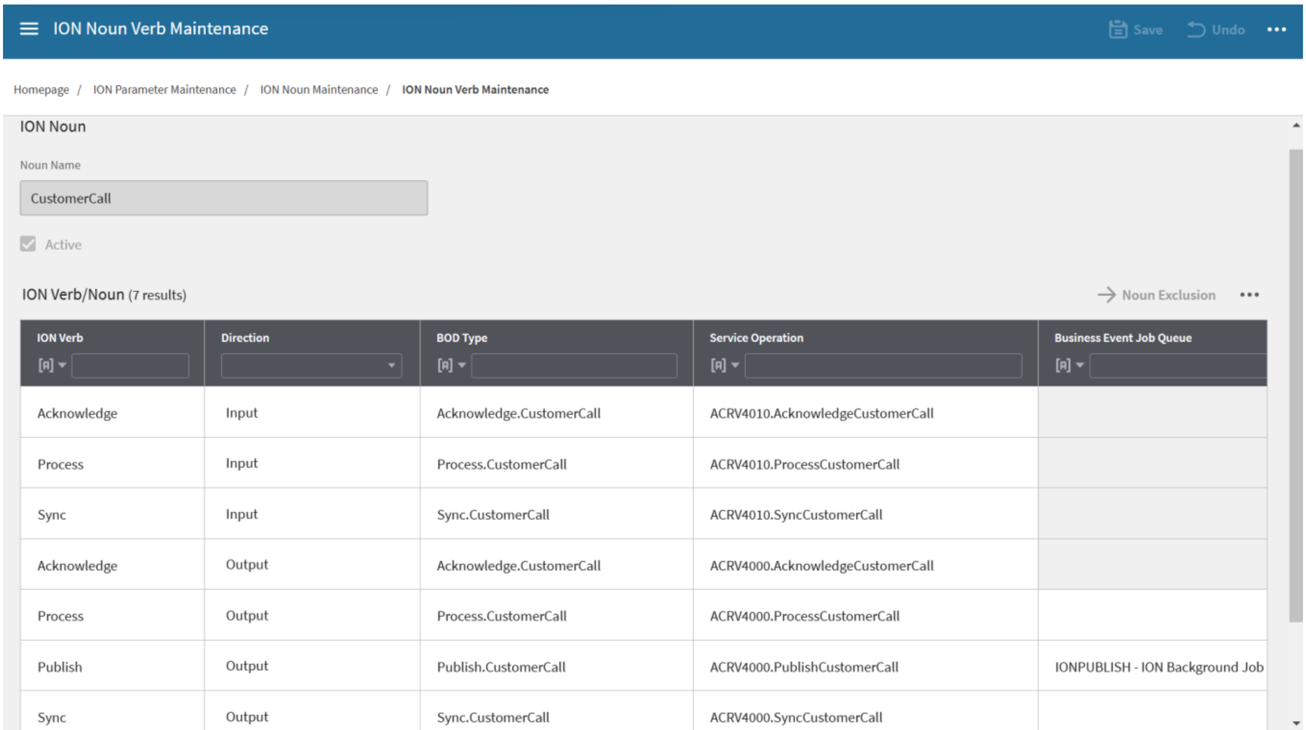


Figure 1

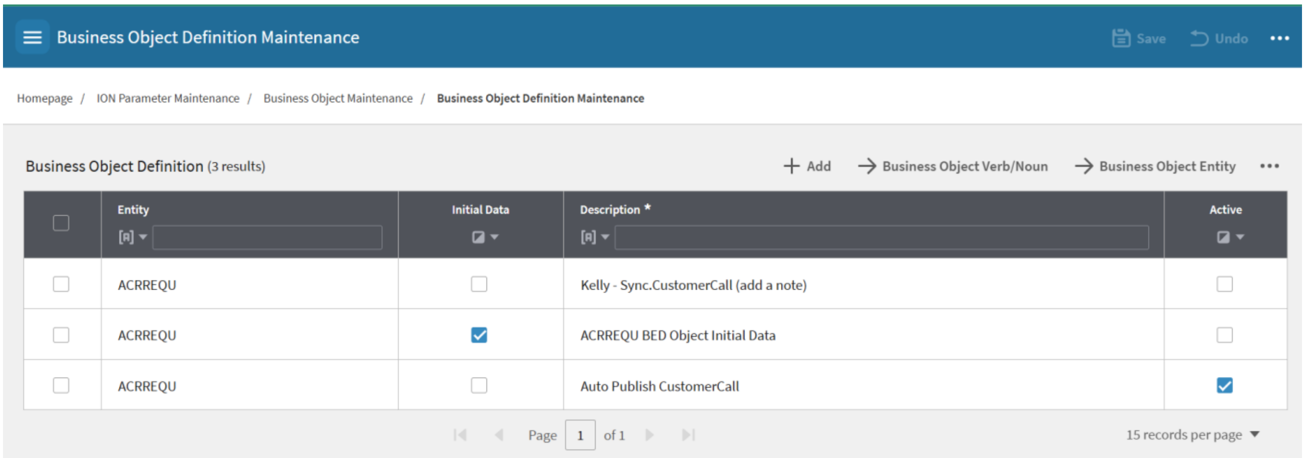


Figure 2

There are several configuration elements which are outlined below:

- System Administration >> Integration >> API Endpoints >> API Endpoint Maintenance – set up the API endpoint for the provider. At present, the only supported provider is Twilio.
- System Administration >> Integration >> SMS >> SMS Provider Maintenance – set up the SMS provider account details and configuration information.
- System Administration >> Integration >> System Parameter Maintenance - selection of active SMS provider.
- System Administration >> System Parameters >> ION Parameters – where the Auto Publish CustomerCall business object definition and its event triggers are defined
- Customer Service >> Parameters >> Notifications >> Data Transformer Maintenance – set up more advanced criteria and filtering using eXensible Stylesheet Language Transformations (XSLT) (optional).
- Customer Service >> Parameters >> Notifications >> SMS Template Maintenance – set up the SMS templates using plain text or Text data transformer data.
- Customer Service >> Parameters >> Notifications >> Notification Type Maintenance – set up the types of notifications available.

SMS Service Provider
Refer to the SMS Notifications Integration under the System – Functionality section in this document to configure the SMS Service Provider.

SMS Templates Maintenance
Use the SMS Templates Maintenance to configure the layout and content of your SMS messages, each SMS template is associated with a specific ION noun, currently the supported ION nouns are:

- CustomerCall for Customer Service
- PathwayApplication for Applications
- PathwayLicence for Licensing.

In Customer Service the SMS Templates Maintenance is accessible via the SMS Template Search Profile from Customer Service >> Parameters >> Notifications >> SMS Template Maintenance.

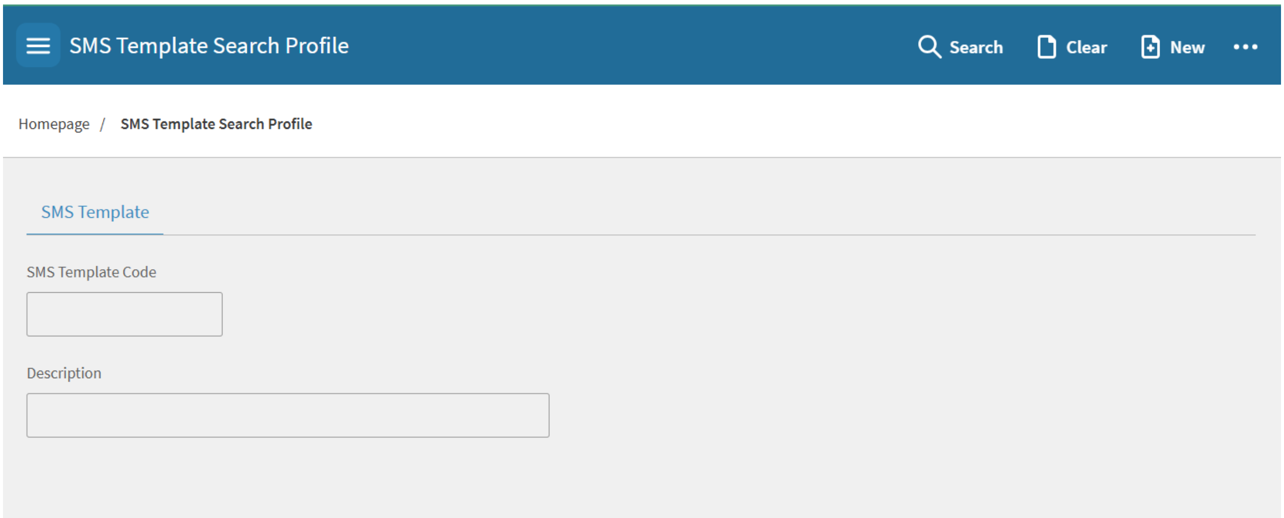


Figure 3

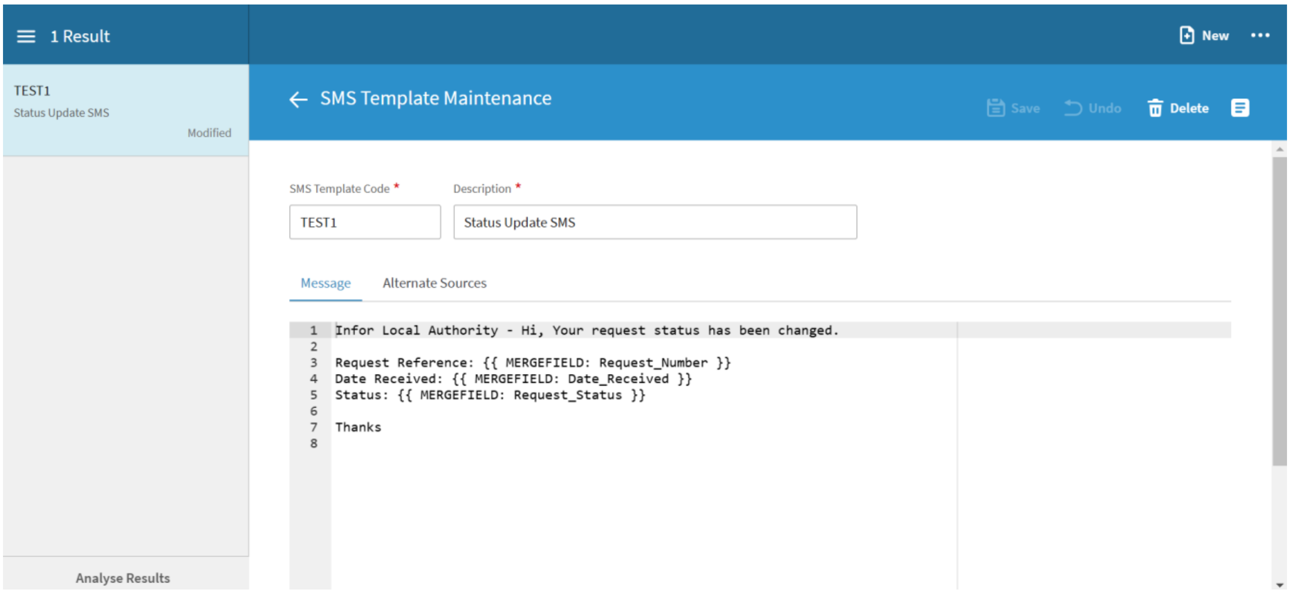


Figure 4

The Message Tab fields are as follows:

- SMS Template Code – A unique alphanumeric value of up to ten characters identifying the template.
- Description– Up to fifty mixed-case characters further describing the SMS template.
- Message – Optional field, the plain body text to use in messages based on the template.

Message

The Message field can accommodate an ample number of characters for an SMS message, with letters allowed in mixed case. The message length is effectively unlimited.

When the right-click menu is displayed while the Message field has focus, a list of available merge fields is displayed.

Selecting a merge field right-click menu option inserts the {{ MERGEFIELD: <fieldname> }} in the position of the cursor within the field with focus.

The available Merge and Extract Fields are shared between the SMS Template and the Email Template for the current module. For example, Customer Service SMS Templates and Email Templates share the same available merge fields list.

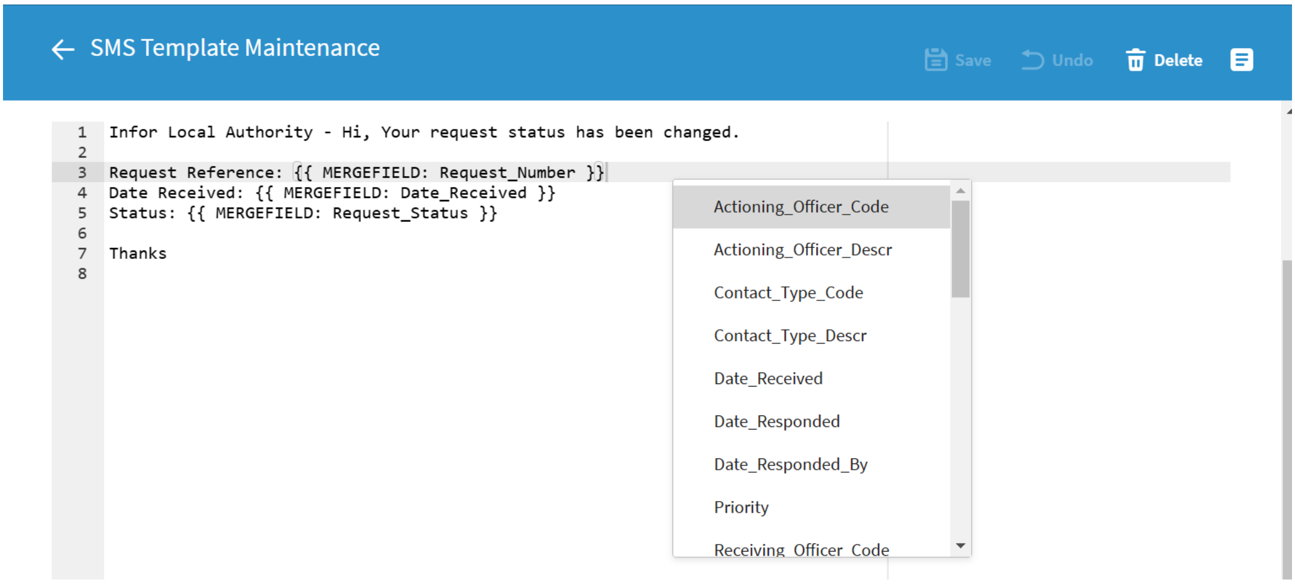


Figure 5

Alternate Sources

Where the message alternate source field has been specified, the value supplied by the alternate message data source will override whatever has been generated for the standard message template field. The Alternate Sources Message field will only allow Text based data transformer selections because an SMS can only allow plan text. The fields are:

- Description - A reminder of the ION noun linked to this module.
- Message - An optional field allowing selection of an active data transformer with an output type of Text.

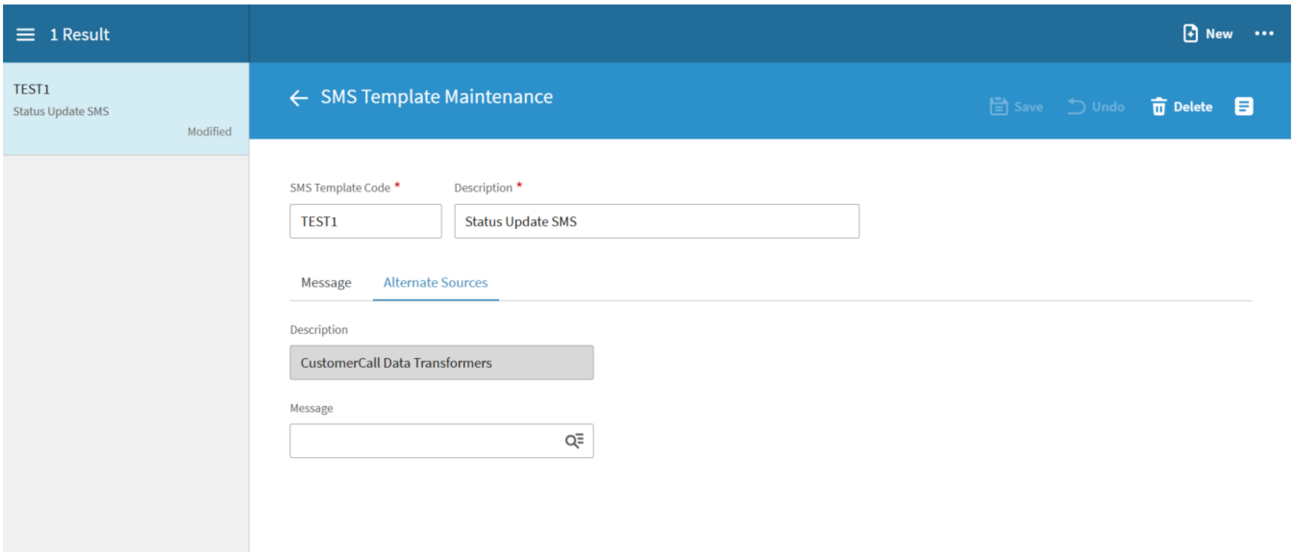


Figure 6

Notification Type Maintenance

New SMS Template field has been added to the notification type Contacts grid to link the SMS template definition that determines the layout and content of the contact's SMS notification message.

The SMS Template field is available on Notification Types Contacts that use Role Types to provide the communication details.

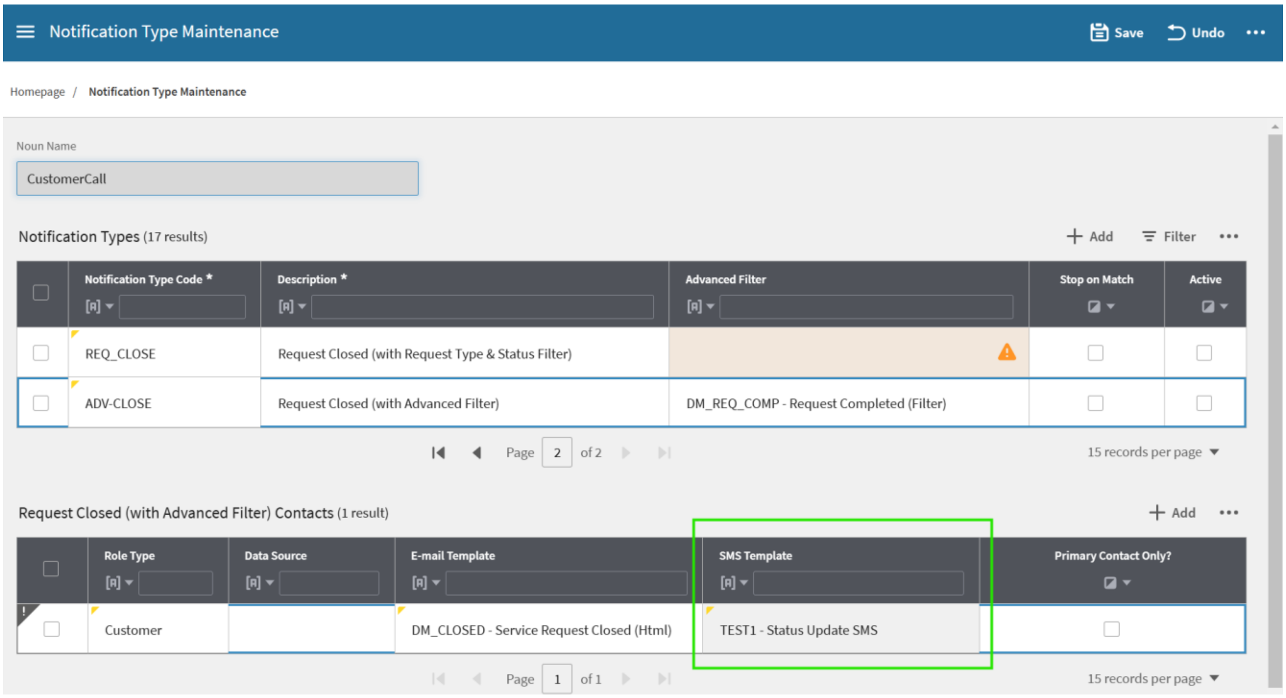


Figure 7

SMS History
All SMS messages sent are available for enquiry in both:
- System Administration >> Integration >> SMS >> SMS History menu option.
- Customer Service >> Request Maintenance/Enquiry >> (Request) >> [Options] > SMS History.

The SMS History menu option allows access to the log of SMS notifications that have been sent, or at least attempted to have been sent. The profile parameters allow a search to be defined that can include a data range, the delivery status of the notification, the originating application, and the destination mobile number.

Selecting the SMS History option from a Request Summary will open an instance of the SMS History search that is pre-filtered to the specific customer request.

SMS Message Details shows the following details:
- Date/time the notification was submitted
- Delivery Status:
  - Pending - queued; not yet sent to the SMS provider
  - Sent - sent to the SMS provider for delivery
  - Delivered - confirmed to have been delivered by the SMS provider
  - Failed
  - Unknown
- Application
- Notification Type
- Template
- The notification text.

For notifications that did not successfully send, a Resent button will be displayed to allow the notification to be re-submitted.
NOTE: Re-sending a notification will result in a new history record being created; the existing history record is not updated.

NOTE: This function will be available only to sites who have the required authority. Contact your Account Manager if your site requires this function.

Request Maintenance

Case:	Work Item: 64654
UX Client	ERS: 111952

REQUEST SUMMARY

The Bulk Function Update Priority has been added to the Customer Service Module. It is now possible to update the Priority on multiple requests, when using Bulk Options Maintenance.

The new Bulk Function is available when the Override Priority is ON in the Customer Service System Parameters.

When the Bulk Function Update Priority is run:
- The Date Priority Last Modified and the Respond By fields on the Request(s) will also be updated.
- The process will also check for Priority Escalation if any, for the Request(s) being updated.
- If a Request is locked by another User, the Request will not be updated during the bulk process and Bulk Maintenance Audit will display all the Request(s) that are locked.

Integration

Experian Address Validation and Delivery Point Identifier (DPID) Integration

Case: LOGA 12559739, PARA 15325008, PARA CS0046810, LOGA CS0056685	Work Item: 44758
UX	ERS:

DELIVERY POINT IDENTIFIER (DPID) ADDRESS VALIDATION FOR EXPERIAN

***** Authorised Function *****

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

Integration for external DPID address validation has now been implemented in Pathway UX for the Experian third party software.

Experian Address Validation is a replacement for the QAS integration that was previously available for Australia and New Zealand in Pathway Smart Client. The Experian software is a cloud service that requires a licence to be obtained from Experian and is also an Authorised Function in Pathway. The old QAS integration is not supported and has been removed from Pathway UX.

The new Authorised Function in Pathway UX is called Experian Address Validation. Any existing customer that has either the QAS-AUS DPID or QAS-NZL DPID Integration Authorised Function can also use this replacement integration in UX only, when they have the new Experian cloud service licence.

The required licence for the Experian cloud service is obtained by contacting Experian https://docs.experianaperture.io/address-validation/experian-address-validation/overview/costs/
When obtaining the licence it is only necessary to be licensed to use the following datasets for Pathway integration:

Australian addresses:
- au-address (Australia Postal Address)
- au-address-gnaf (Australia Geocoded National Address) - this is optional see details below to decide if you need it or not.

New Zealand addresses:
- nz-address (New Zealand Postal Address).

It is expected each customer would choose Australian or New Zealand datasets, not both, but it is possible to license and use datasets for both countries if required.

Once the Experian cloud service licence is obtained, Pathway parameter setup is required.
1. Ensure one of the Authorised Functions (QAS-AUS DPID or QAS-NZL DPID) is active, via System Administration >> System Parameters >> System Parameter Maintenance – Options – Authorised Function.
2. Go to System Administration >> Integration >> DPID Parameters >> DPID Product Parameters to configure the parameters for the DPIDEX (Experian Address Validation) DPID product.

Example configuration, Figure 1:

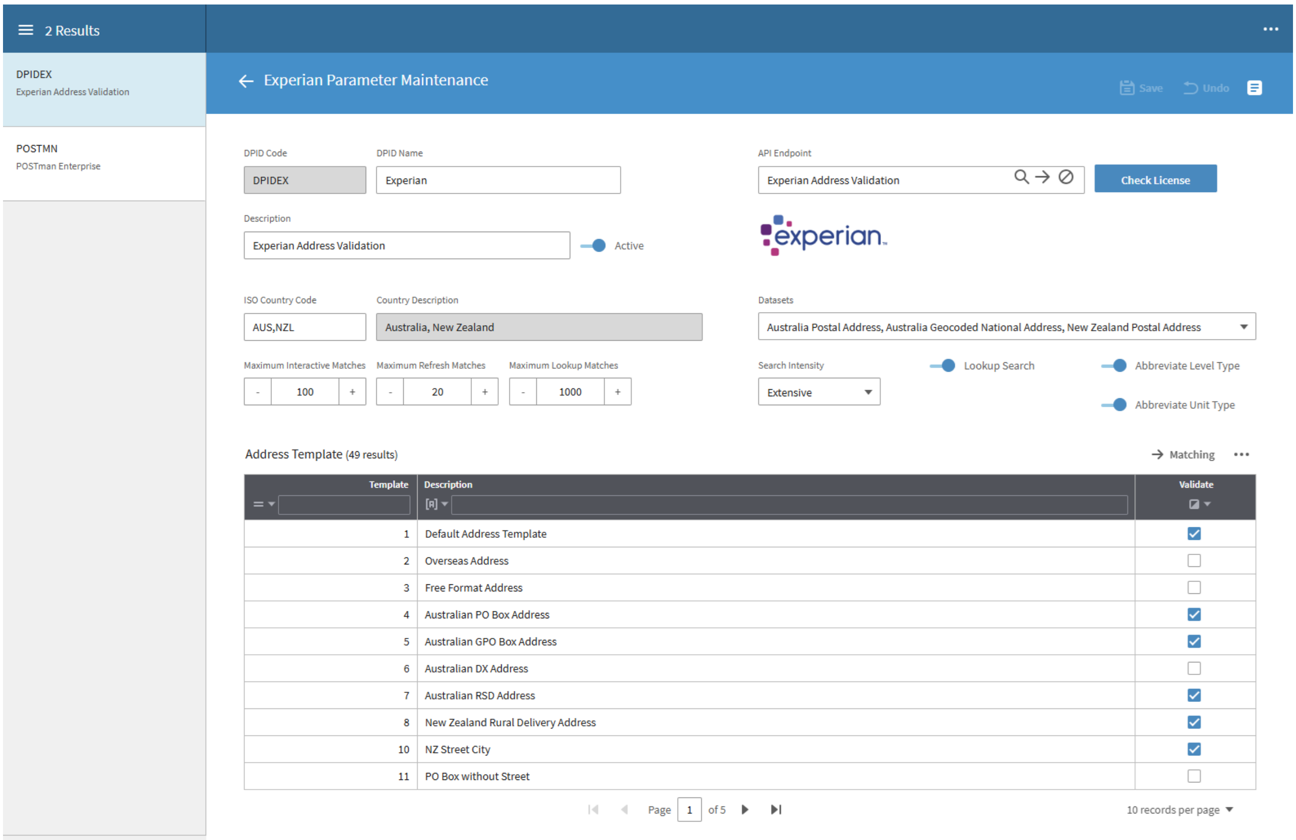


Figure 1

- DPID Code is pre-defined and is not able to be changed.
- DPID Name and Description are pre-populated and can be changed if you wish or left unmodified. The DPID Name is used in the Pathway user interface in various places.
- API Endpoint must be defined via the selector by clicking the search icon. You can search and select if it has previously been defined, otherwise a new one must be created.

Example configuration, Figure 2:

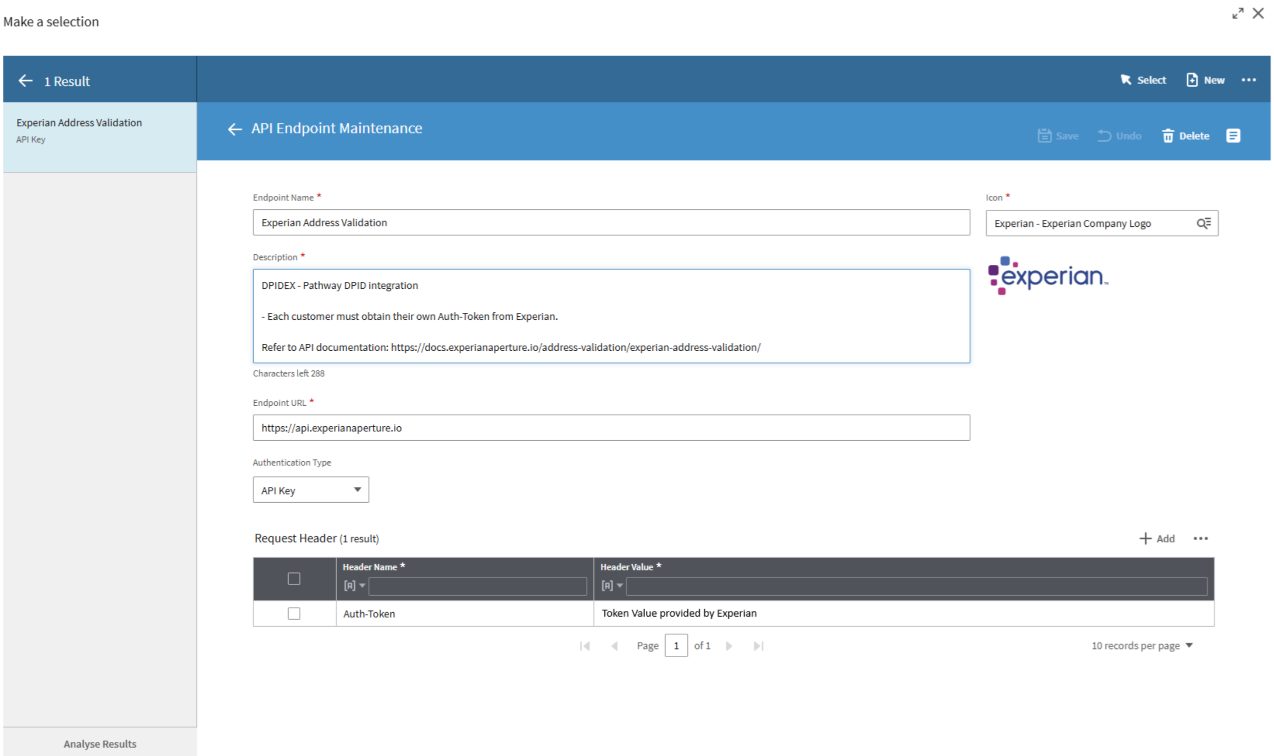


Figure 2

Once the API Endpoint is selected, the API Endpoint details can be viewed or modified by using the detail arrow button, if required. It is also possible to define and view all API Endpoints via System Administration >> Integration >> API Endpoints >> API Endpoint Maintenance.

Endpoint Name: Experian Address Validation
Description: DPIDEX - Pathway DPID integration
Icon: It is recommended to change this to the pre-defined Experian Company Logo icon rather than the default
Endpoint URL: https://api.experianaperture.io
Authentication Type: API Key.

The Request Header data grid needs to contain one record with:

- Header Name: Auth-Token
- Header value: The token value provided to you by Experian.

Once the API Endpoint has been selected and the changes are saved the Check License button is available. Click on Check License to display a dialog containing the datasets you are licensed to use, Figure 3:

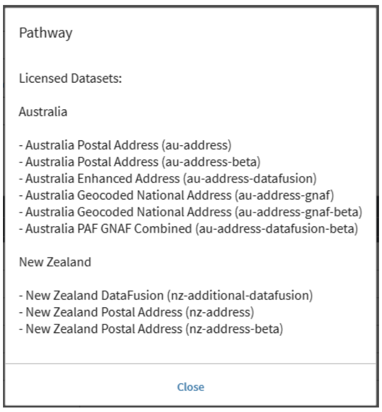


Figure 3

To use:
- Australian dataset set the ISO Country Code to AUS.
- New Zealand dataset set the ISO Country Code to a value of NZL.
- To use datasets from both countries set the ISO Country Code to a value of AUS,NZL.

The Datasets are available once the country code is set, choose the dataset or datasets you want to use for address validation.
- For New Zealand there is only a choice of the New Zealand Postal Address dataset.
- For Australia there may be a choice of two datasets depending on the licence you obtain from Experian.
    - The Australia Postal Address is the one used for validating addresses so you must choose that one.
    - If available also choosing the Australia Geocoded National Address dataset will result in the additional data attribute call G-NAF Persistent Identifier to be populated on validated address records in Pathway.

NOTE: Details about the Geoscape Geocoded National Address File (G-NAF) and what it can be used for can be found here: https://data.gov.au/data/dataset/geocoded-national-address-file-g-naf.

NOTE: Selecting the G-NAF dataset in Pathway results in an additional Experian licence usage for this dataset, so for each address validation in Pathway there are two Experian licence count usages. You can decide if you want the G-NAF identifier in Pathway or not. The Australia Geocoded National Address dataset can be added later if you do not require it now for the address validation integration but do require it in the future.

NOTE: If you are licensed to use datasets other than the three mentioned above, they will not be used by Pathway so are not made available for selection in the Datasets field.

The remaining fields have default values that should not need to be changed:
- Maximum Interactive Matches: 100
- Maximum Refresh Matches: 20
- Maximum Lookup Matches: 1000
- Search Intensity: Extensive
- Lookup Search: On
- Abbreviate Level Type: On
- Abbreviate Unit Type: On.

The Address Template data grid at the bottom lists all the Address Templates that have been defined in the Name and Address Register module and any addresses that use these will be validated by default. Switch off any not to be validated by this integration.

It is also necessary to nominate appropriate Matching details for Address Prefix and House Number fields that are to be validated, or exclude them from validation, for all Address Templates that are validated. If you do not do this matched address details will not be correctly set on the addresses in Pathway.

Use the Matching button on the data grid for each Address Template being validated.

Example: configure for an Australian Default Address Template would use the following matching options, Figure 4:

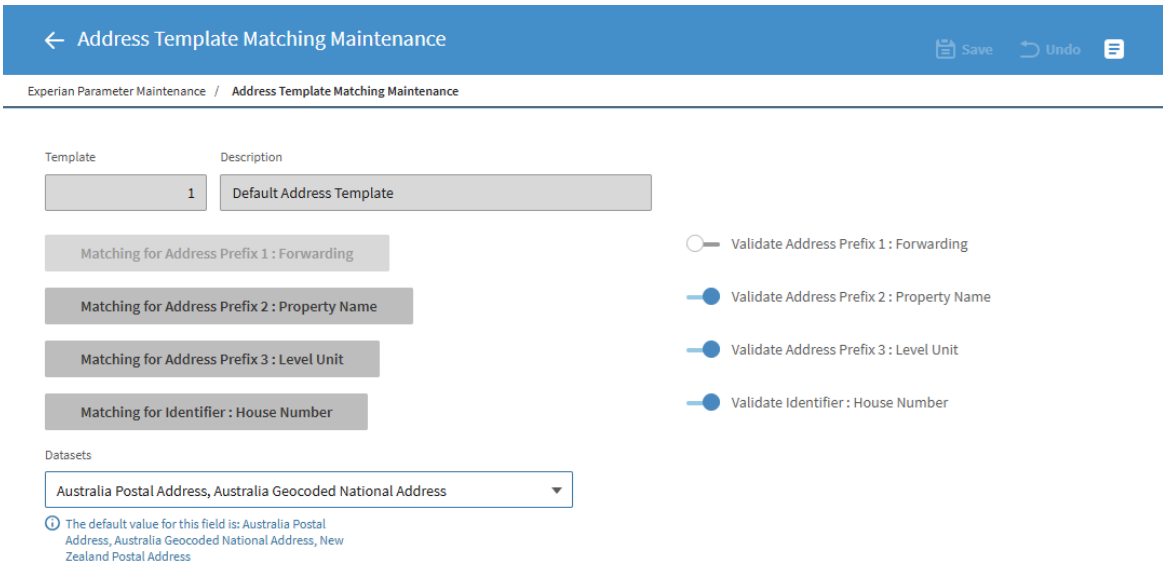


Figure 4

The Datasets field can be used to override the Datasets used for the Address Template if the default values previously selected are not correct.

NOTE: when multiple Datasets are selected for an Address Template, they must all be for the same country for a successful validation.

In the example configuration shown in Figure 5:

- Address Prefix 1 is excluded from validation by switching it off, which you can see disables the matching button for that prefix.
- Address Prefix 2 is used for Property Name and is to be validated, which is done by clicking on that button to display the dialog to nominate the Building Name and Building Name (Secondary) match options.

After assigning the required match options click the Continue button, Figure 5.

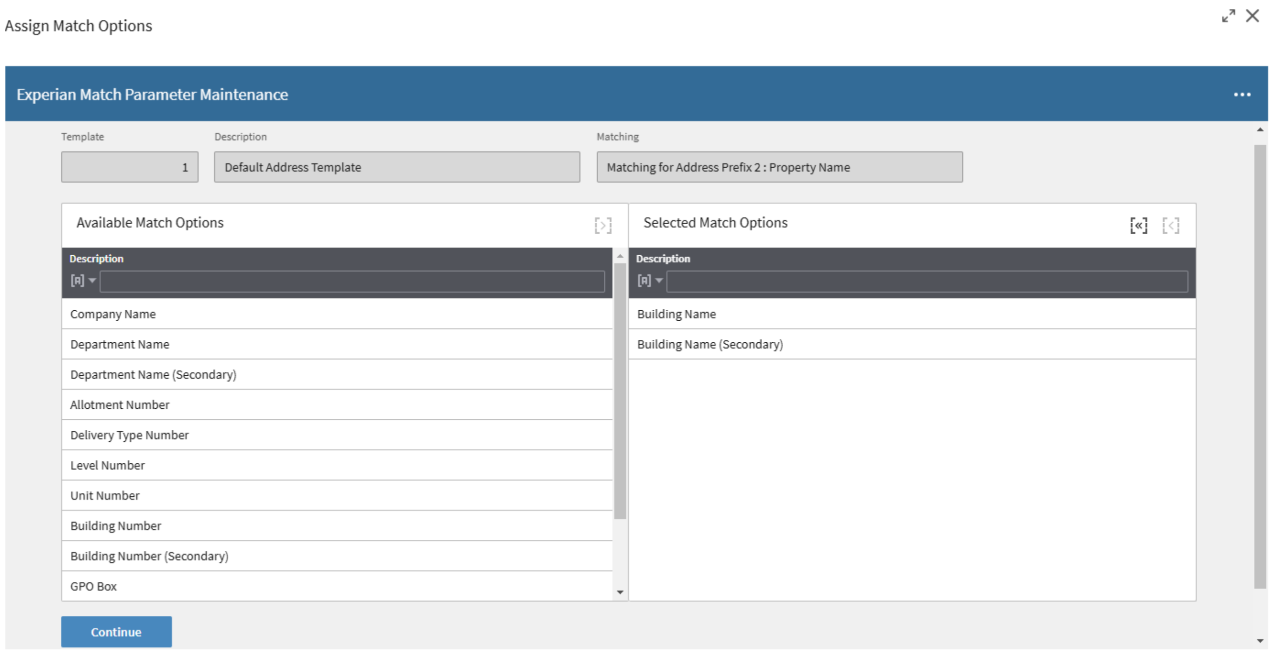


Figure 5

Address Prefix 3 is used for Level and Unit Numbers and is to be validated so needs the Delivery Type Number, Level Number, Unit Number and Other Components match options assigned.

The Identifier is used for House Number and is to be validated so needs the Building Number and Building Number (Secondary) match options assigned.

Changes to the match options need to be saved by clicking the Save button. The full list of available match options is:
- Company Name
- Department Name
- Department Name (Secondary)
- Building Name
- Building Name (Secondary)
- Alotment Number
- Delivery Type Number
- Level Number
- Unit Number
- Building Number
- Building Number (Secondary)
- GPO Box
- PO Box
- RD (New Zealand addresses)
- Other Components.

It may take some trial and error to correctly set the match options assigned to all your Address Templates. If parts of a matched address are not able to be successfully applied to the address record for a specific Address Template, Pathway will show a message containing the details that could not be matched and suggest trying a different Address Template or the Match Option parameters may need to be modified for the Address Template.

3. Finally, to activate the Experian Address Validation integration, to System Administration >> Integration >> System Parameter Maintenance and set the Delivery Point Identifier Product to DPIDEX.

Once this setup is complete, the following functions become available:
- Experian DPID Refresh batch job for updating any changes that are issued regularly by Australia Post, NZ Post and optionally Geoscape Australia for the G-NAF data.
- Lookup Search in Address Search Profile.
- Address validation in Address Maintenance.

The Experian DPID Refresh batch job, Figure 6, is available from two menu options:
- Name and Address Register >> Name and Address System Housekeeping >> Experian DPID Refresh and
- System Administration >> Integration >> DPID Parameters >> Experian DPID Refresh.

The batch job validates each address it processes and updates any address if requested to do so. It can be used as an initial validation and population of DPID data onto Pathway addresses as well as for validation and update of existing addresses that already have DPID data.

This means usage of Experian licence counts for each address that is processed even if no updates are performed to the address. This process can be multi-threaded so can very quickly increment Experian licence usage counts.

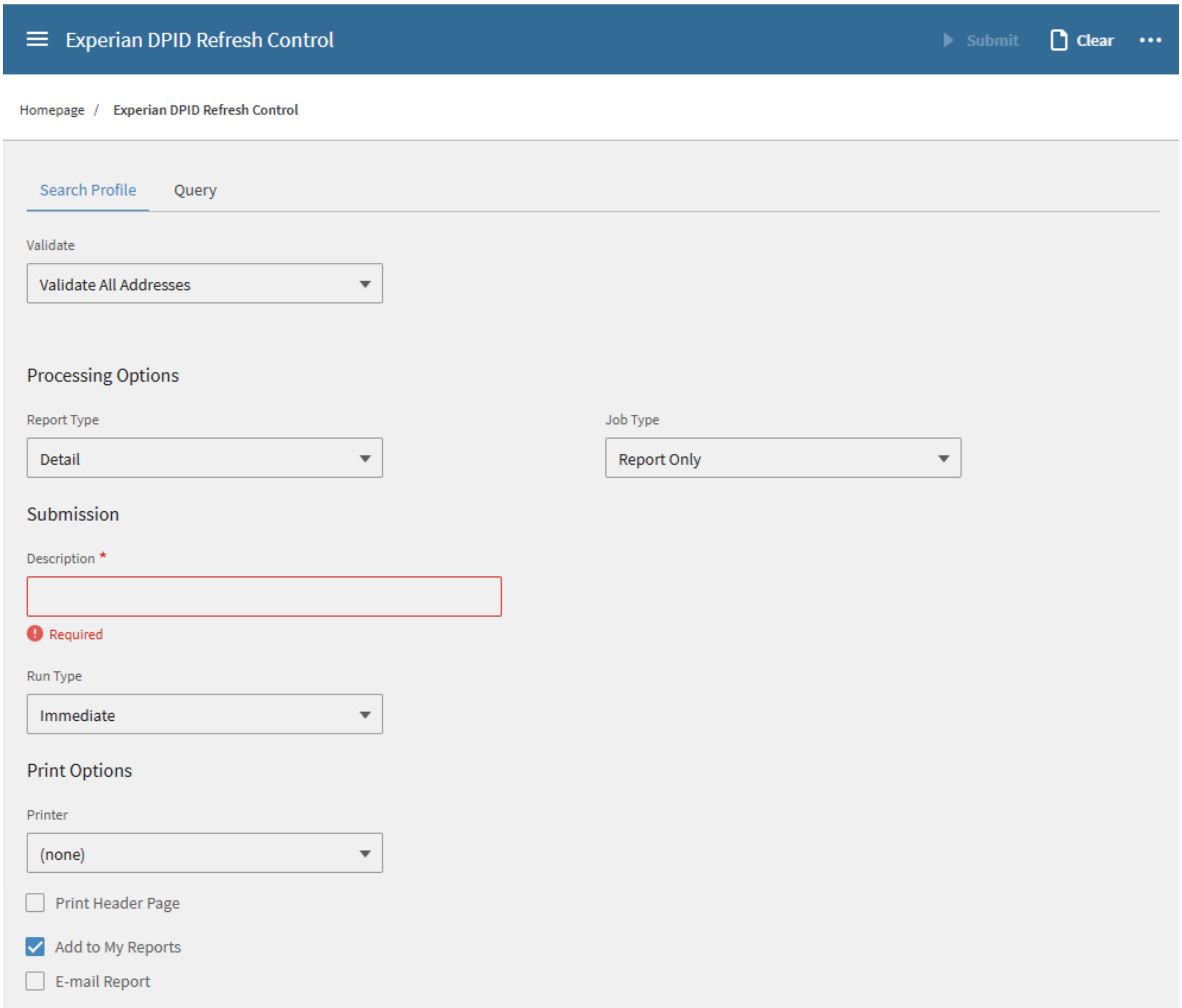


Figure 6

The Validate field in the Search Profile allows the choice of Validate All Addresses to run the process over all the Name & Address module addresses, Validate Matched Addresses to only run over addresses that already have DPID data on them and Validate Unmatched Addresses to only run over addresses that do not already have DPID data on them.

Choose a Report Type of Detail or Summary for different levels of information to be shown in the report that is produced.

A Job Type of Report Only will not perform any updates but choosing Update and Report will modify addresses to correct them and/or apply DPID data into the database.

This batch job also provides the ability to use a Pathway Dynamic Query or Query Result for CNAADDR to control which records to process.

The Lookup Search function is switched on by default in the DPIDEX product parameters and provides improved productivity when searching for existing addresses and creating new addresses.

When using the Name and Address Register >> Address Maintenance menu option or when adding an address to a name an additional section appears in Address Search Profile. Figure 7:

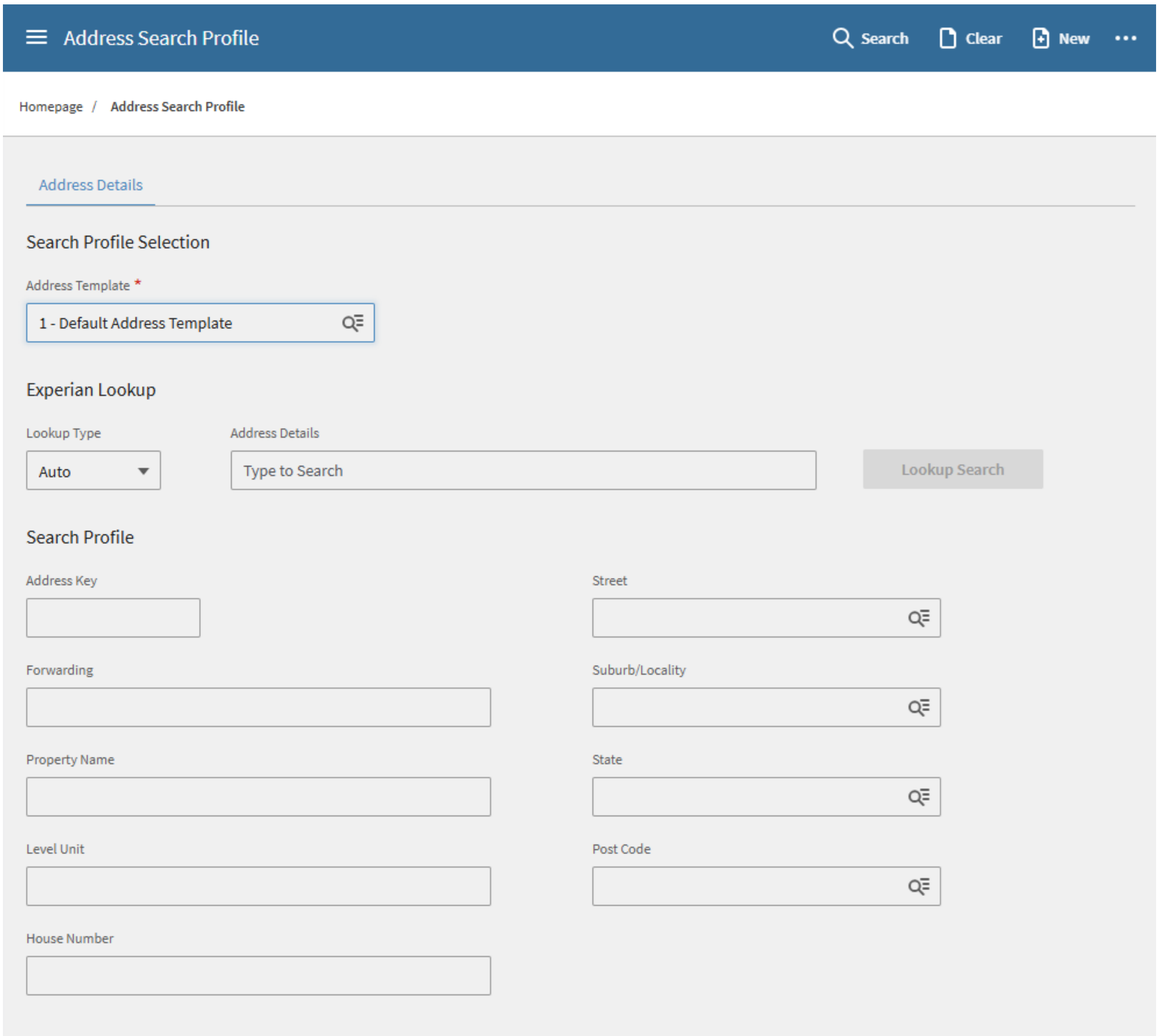


Figure 7

The Experian Lookup section contains a Lookup Type field with a default value of Auto, an Address Details field and a Lookup Search button.

It is possible to enter a free text address and choose from the available valid addresses that are returned by Experian and displayed in Pathway as an intuitive auto complete list that is refined as more details are entered. Entering only partial details can very quickly locate the required address.

Once the address is located the Lookup Search is enabled and clicking on it will search the Pathway database for the address. If it exists it can be used as required. When the address does not exist the individual parts of the address are automatically populated into the appropriate search profile fields and are used when the New button is selected to create the new address quickly and more accurately.

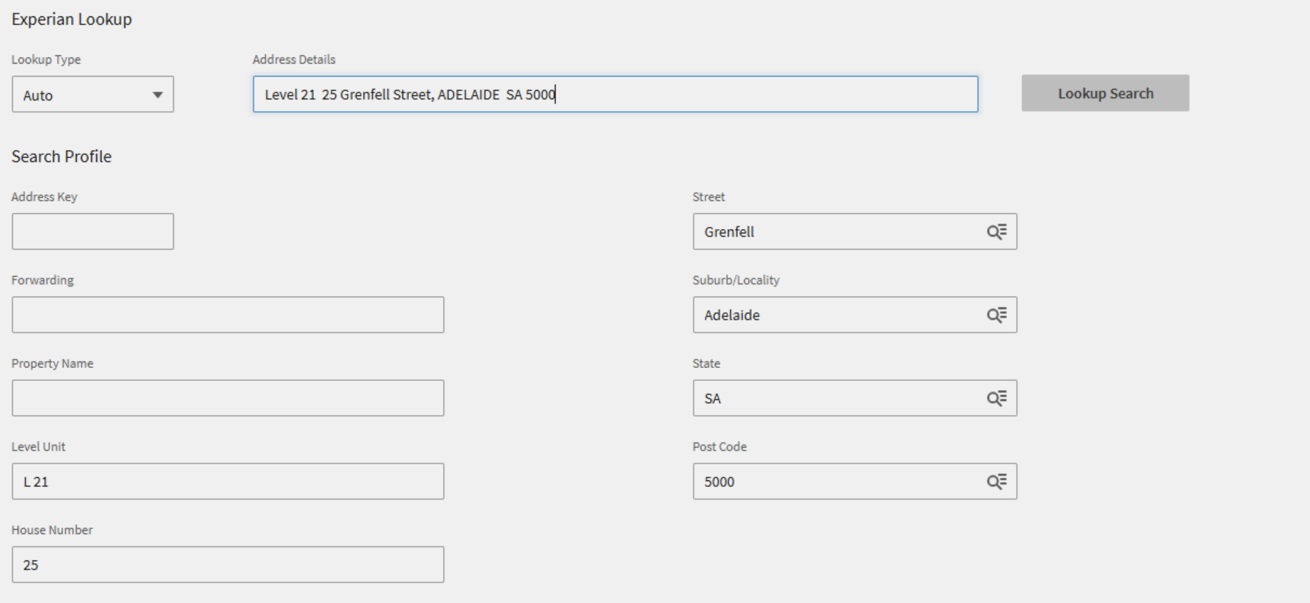


Figure 8

The Auto Lookup type would be most used but two other lookup types are available. Changing the Lookup Type to Locality enables a locality, such as Suburb, to be searched for, presenting a list of valid addresses to choose from with minimal data entry. A Lookup Type of Postcode is also available that works the same way with just the Postcode being entered.

If for any reason this function is not required it can be switched off in the DPIDEX product parameters. Clicking on the Lookup Search button will increment the Experian usage count.

Address Maintenance used for creating new addresses, or updating existing addresses, validates each address that uses an address template that has been nominated to be validated in the DPIDEX product parameters. This occurs when the address is saved using the Save button. If the address details are verified to be a match for a valid address by Experian the address will be updated with the DPID data. If the address details are identified as a close match to multiple addresses by Experian a list of near matches will be presented to select from, then the chosen address is updated with the DPID data.

For new developments, the valid addresses might not have made it into the Experion datasets. When that is the case the selection of a near match can be cancelled and instead a question appears asking to verify and accept the new address even though it could not be matched.

We have also added a display of the DPID data attribute fields in Address Maintenance for easy reference and as a visible indicator that the address has been validated. These details do not display if they have not been validated and recorded in the Pathway database.

For New Zealand addresses validated with the nz-address dataset, only the Delivery Point Identifier attribute is available for display all the others apply to Australian addresses.

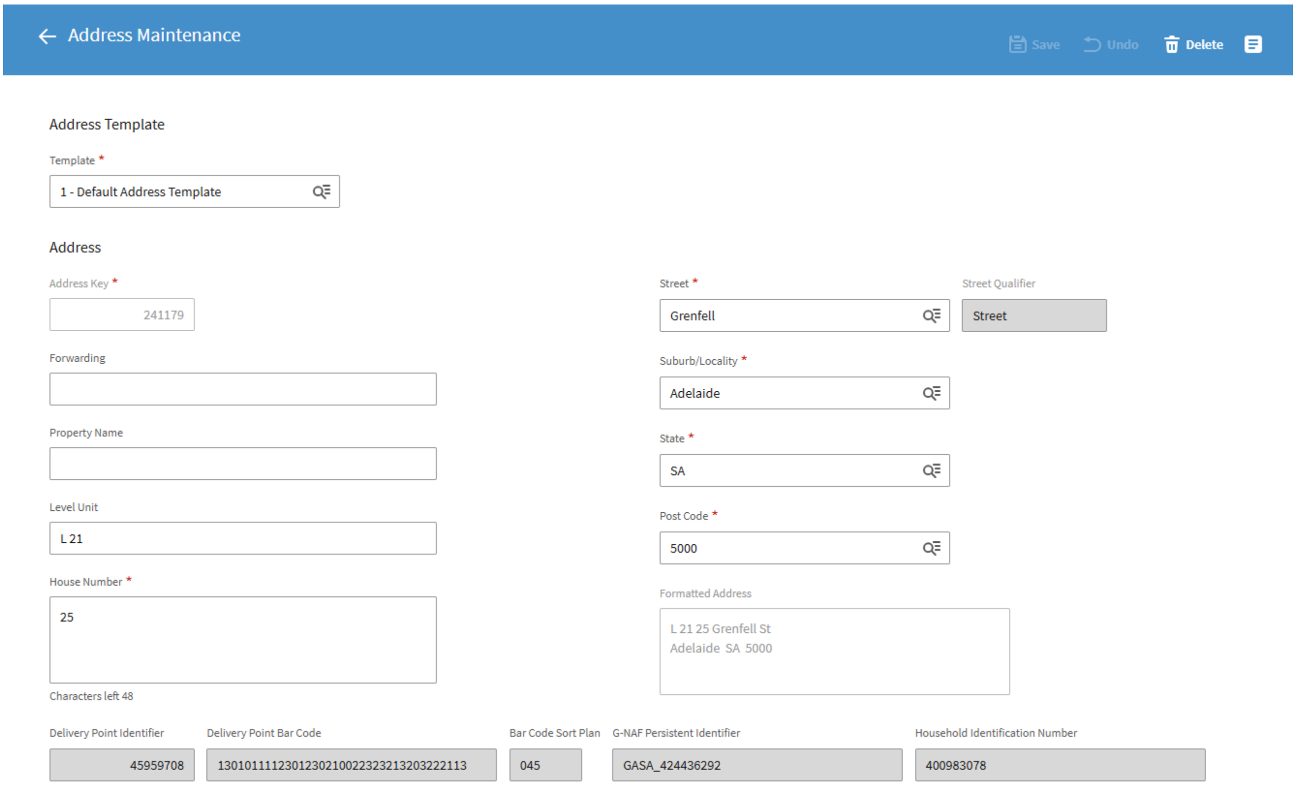


Figure 9

NOTE: This function will be available only to sites who have the required authority. Contact your Account Manager if your site requires this function.

ePathway System

ePathway System Parameters

Case: UX Client	Work Item: 57811 ERS:

LOCAL TIME ZONE SYSTEM SETTING WARNING

Any change to the LocalTimeZone System Setting requires the Data Manager service to be restarted to take effect. A warning is now displayed when this System Setting changes.

ePathway Login

Case: FRNK CS0178682 UX Client	Work Item: 63978 ERS:

TOO MANY REDIRECTS ERROR

If a logged in user attempted to navigate to a page they did not have permission to access, a **Too many redirects** error was triggered rather than displaying the Login page. Now they will be redirected to the Login page.

Data Manager Delete User

Case: UX Client	Work Item: 64544 ERS:

EPATHWAY USER DATA CLEANED UP WHEN USER DELETED IN PATHWAY

When an ePathway User Account is deleted in Pathway (System Administration >> ePathway >> System Parameters >> Web User Maintenance) it triggers the removal of the User Account in the ePathway database, however, some of the associated User Account data was not being cleaned up, which could occasionally result in the User Account not being deleted at all.

ePathway Main Menu

Case: BALL CS0367873 UX Client	Work Item: 64814 ERS:

MENU SEARCH RESULTS DISPLAY ISSUE ON MOBILE DEVICES

The Menu Search results were not displaying correctly when viewed on mobile devices. Results will no longer be hidden by the main logo.

ePathway Single Sign On

Case: UX Client	Work Item: 65025 ERS:

SINGLE SIGN ON CONFIGURATION CHANGES REFRESHED FROM METADATAURL

A new System Setting SingleSignOn.IFS.MetadataUrl has been added to allow any configuration changes or rotation of certificates to be picked up automatically. This is in lieu of the existing SingleSignOn.IFS.MetadataXml setting which will continue to be used if the MetadataUrl has not been set.

The URL should match what is in the IDP file against the Idp.metadata.url setting.

ePathway Name Search

Case: COGC CS0501144, MACK CS0503931	Work Item: 65191
UX Client	ERS:

NAME SEARCH ACCESSIBILITY

There is a name search function in the Applications, Licenses and Animals modules in ePathway. If configured it allows the user to search name records in the NAR. However, if it was not configured there was still a way to access the Name Search pages directly. This has now been changed to check the current configuration before allowing name searching.

ePathway General Enquiry

ePathway General Enquiry

Case: UX Client	Work Item: 63481 ERS:

RESPONSES ENQUIRY

***** Authorised Function *****

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

Response Enquiry is only accessible to customers with the ePathway Application Enquiry Tracking Authorised Function.

For online entry, Responses mainly refers to online Objections, Referrals and Requests for Information able to be submitted via ePathway General Enquiry Applications. There has been the ability to submit Responses within ePathway, but until now no means to enquire upon those submissions or those created within Pathway UX. The changes here will allow online enquiry of nominated Response Types as well as improved access to Responses within Pathway UX.
To facilitate the gathering of details relating to a Response, changes have been made to Pathway UX document/letter generation to allow the nomination and generation of a Response Summary document. This new document can include details of the Application, the Response, and attachments submitted online.

RESPONSES PARAMETER SETUP - PATHWAY

To nominate which Response Types can be exposed online, the Application Enquiry List Parameters associated with ePathway General Enquiry Applications now allows selection of the Response Types and whether they are to be Publicly viewable.

This is accessible via the new Response Types option shown in Figure 1:
System Administration >> ePathway >> General Enquiry Parameters >> Applications Enquiry Parameters >> Application Enquiry List Parameters >> Class >> Code >> Modify.

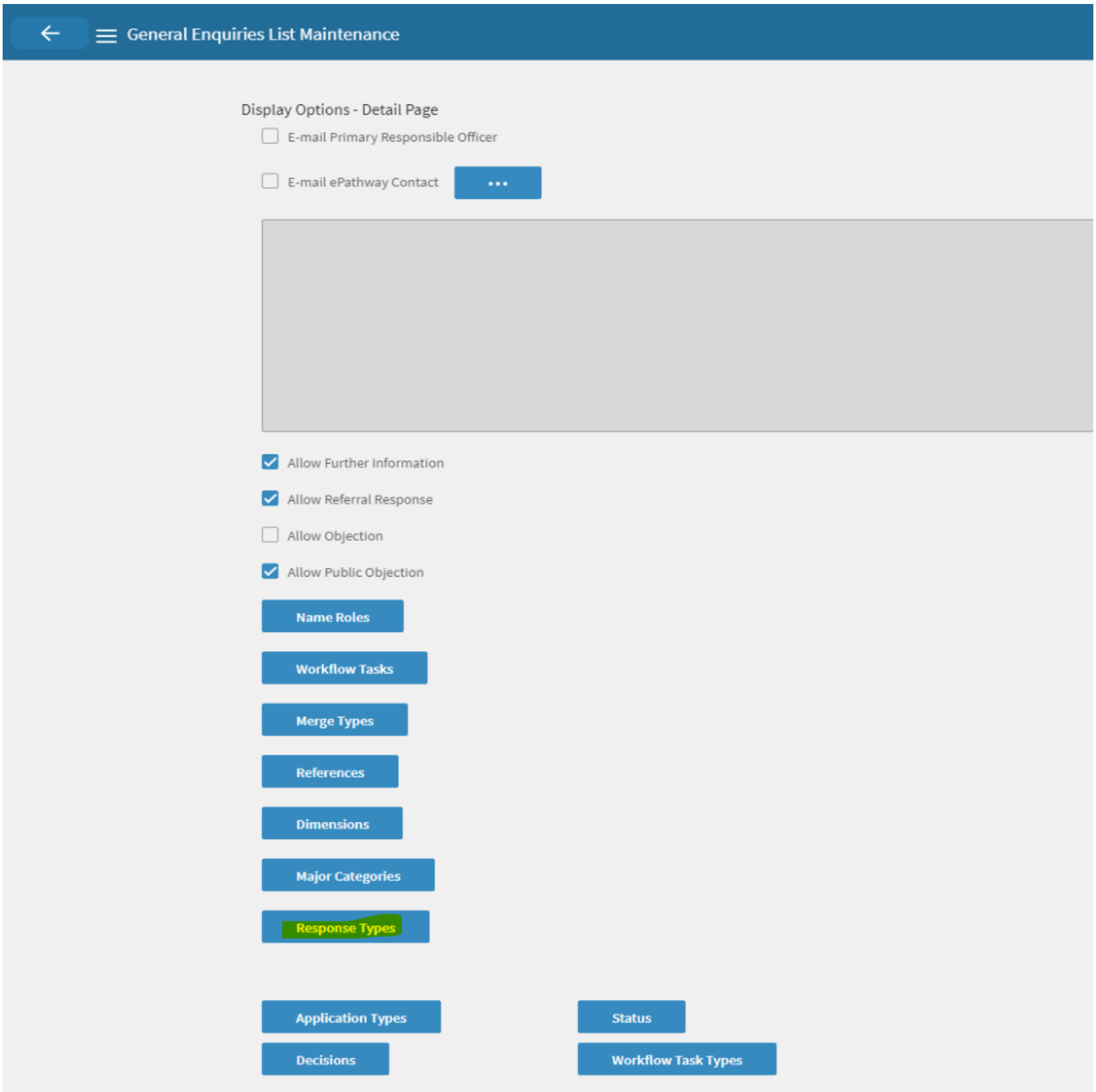


Figure 1: Application Enquiry List Parameters

Only those Response Types selected, Figure 2, will be available to ePathway and potentially displayed on the new ePathway Response Enquiry. Those marked as Public will be viewable by all users who can view the Application. Only Application Stakeholders, as determined by the nominated Stakeholder roles such as Applicant in the existing ePathway parameters, will be able to view the Response Types selected that are not marked as Public.

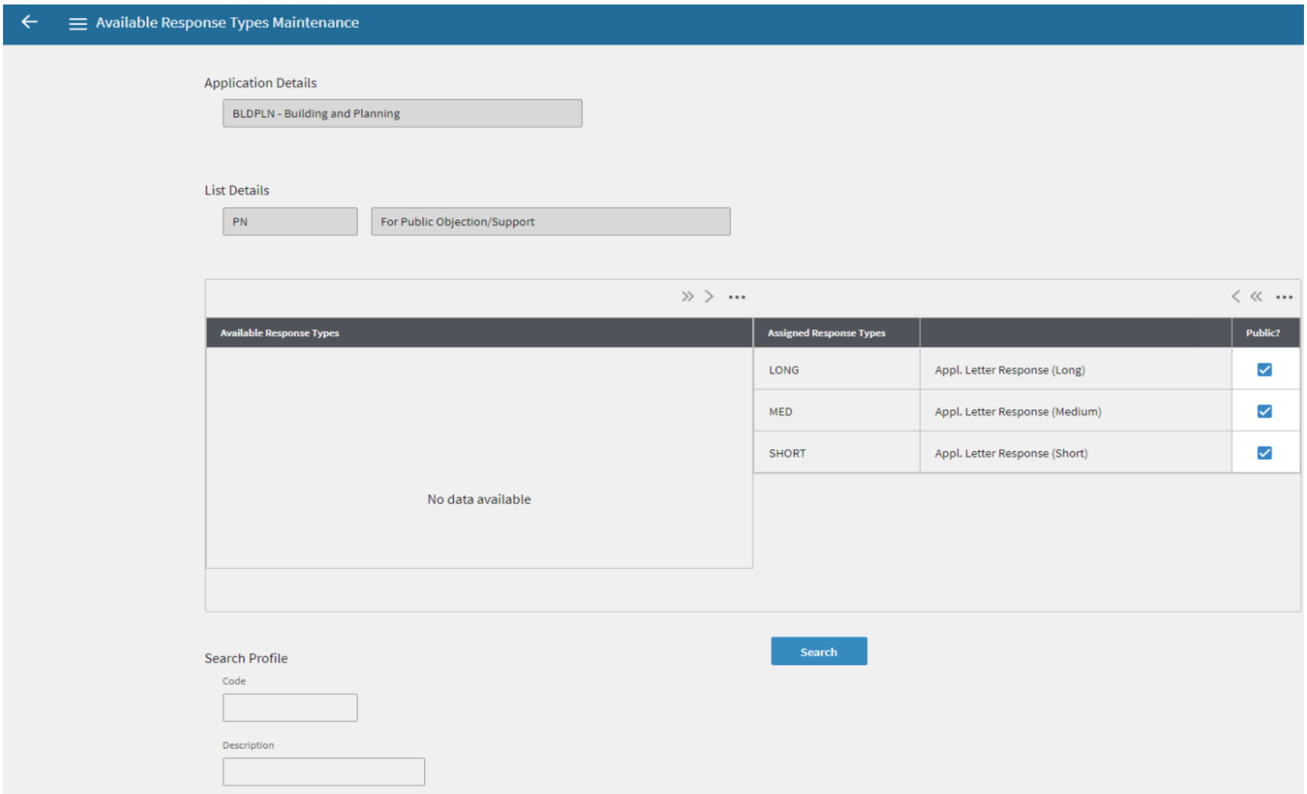


Figure 2: Response Type Selection

There are also new additions to the existing ePathway General Enquiry Response parameters, Figure 3, available via:
System Administration >> ePathway >> General Enquiry Parameters >> Applications Enquiry Parameters >> Application Stakeholder and Response Parameters >> Class >> Type >> Response.

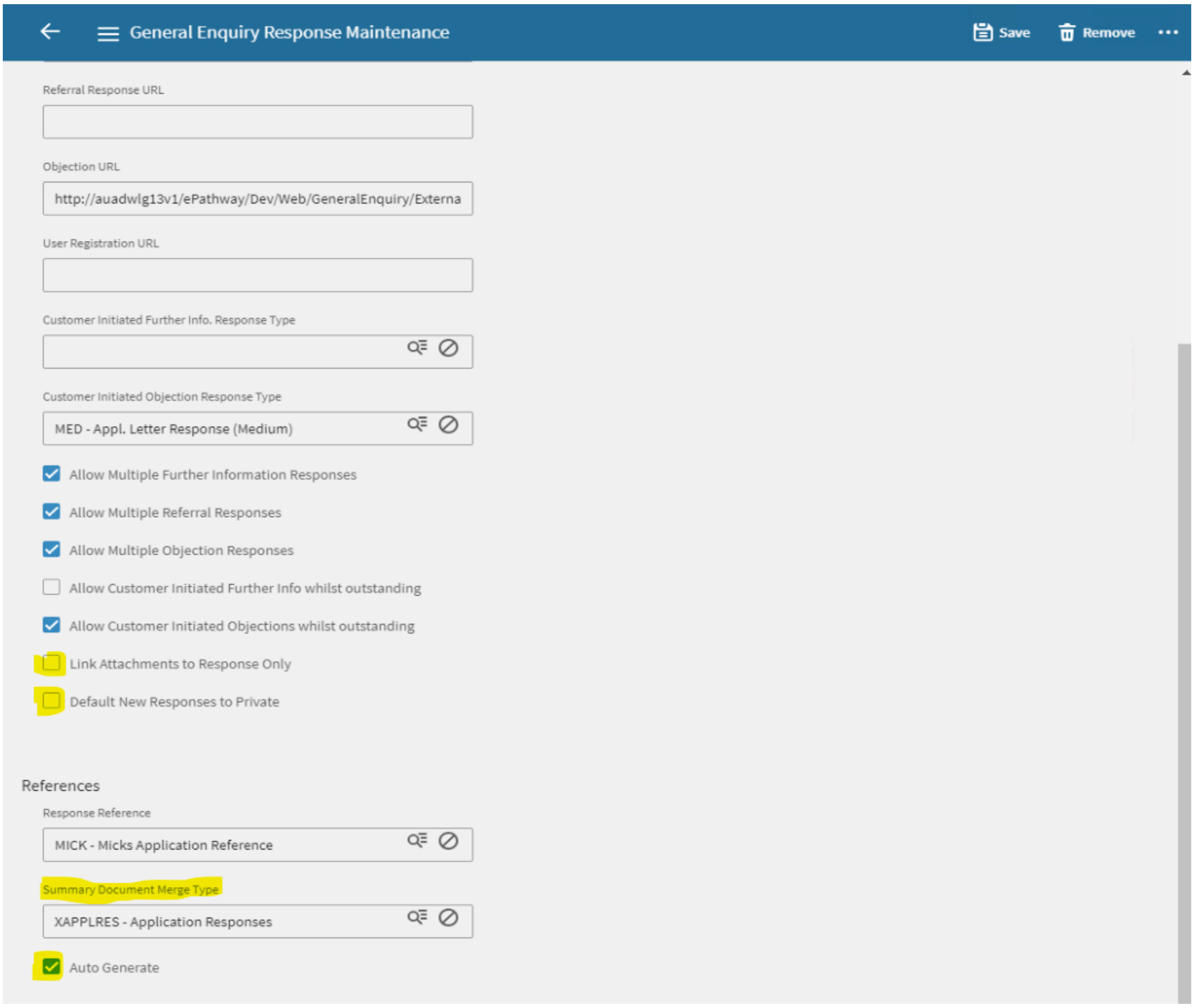


Figure 3: Response Type Selection

As the navigation suggests, these parameters are specified at the Application Type level and allows entry of four new parameters as shown in Figure 3:

Parameter Label	Purpose
Link Attachments to Response Only	If checked, attachments submitted against a Response are attached to the Response only. If un-checked, then previous behaviour will be retained – I.e. Attachments submitted against a Response are attached to the Response and the Application.
Default New Responses to Private	If checked, then newly submitted Responses will be marked as Private by default. NOTE: The user can still change the value when submitting the response on the commit screen, but this determines its default value to be set.
Summary Document Merge Type	This allows selection of the Merge Type to be used to generate the document with summary details of the Response.

RESPONSES PARAMETER SETUP – EPATHWAY

The ePathway parameter screens accessible to Administrator users within ePathway allow configuration of all new screen headers and field labels as well as nominating which field data is to be included and in which order.

NOTE: that the following Web Server Exports will need to be performed before the new details will be accessible via Pathway UX (System Administration >> ePathway >> System Processing >> Web Server Export):

- Response Type Export
- Response Field Export.

To facilitate the new entry fields and their attributes, the Page Layout associated with ePathway Application Response has been expanded to include new types and fields.

The existing function allowed definition of fields for three fixed types:

- FINFO – Requests for Further Information
- RRESP – Referral Responses
- OBJCT – Objections.

This has been expanded to include the Summary and Detail enquiry types as shown in Figure 4 which allows the screen header and instructions to be tailored for the enquiry screens (see next section) and for the Layout to be tailored for each:

- SUMMARY – Response Enquiry Summary
- DETAIL – Response Enquiry Detail.

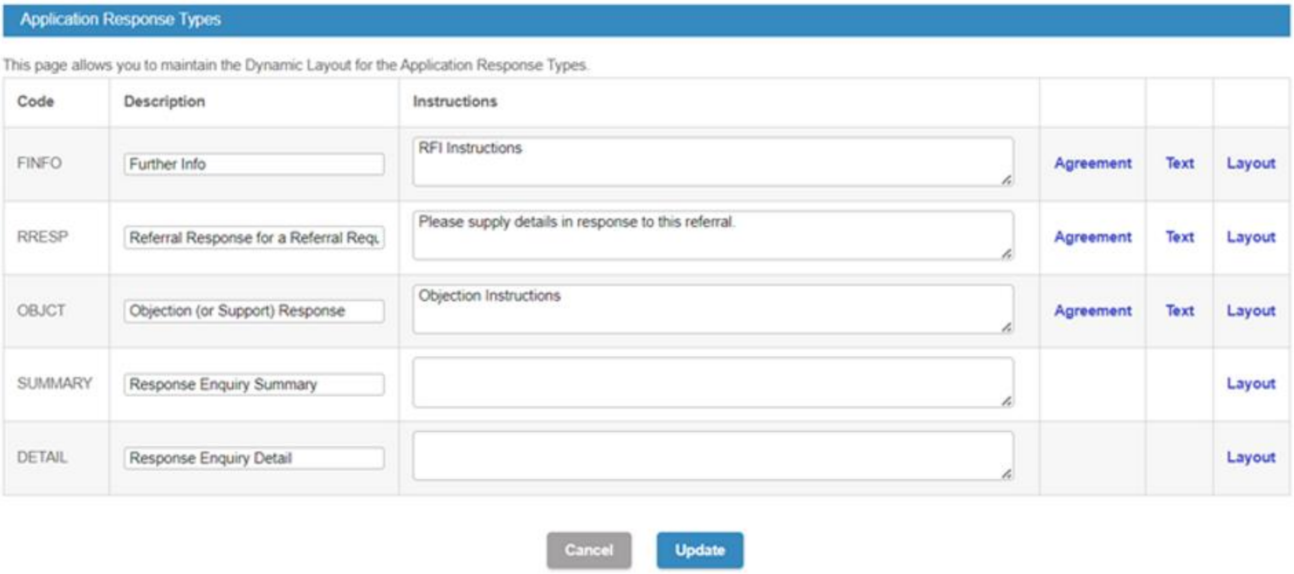
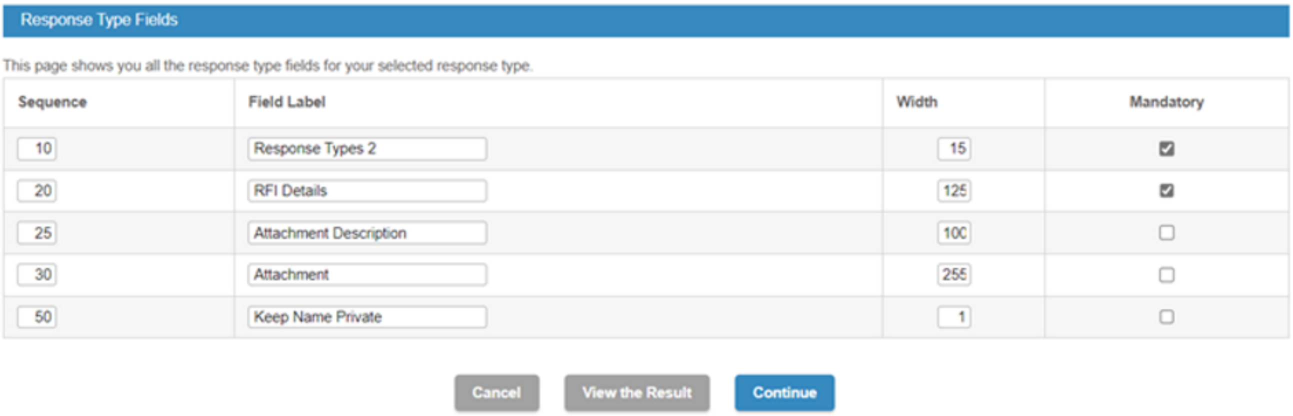


Figure 4: Admin >> Layout >> Page Layout >> ePathway Application Response

An additional field has been added to each of the existing Response Types layouts, which allows the privacy prompt (see later figure in next section for entry screen display) to be tailored from its default value of Keep Name Private as shown in Figure 5.



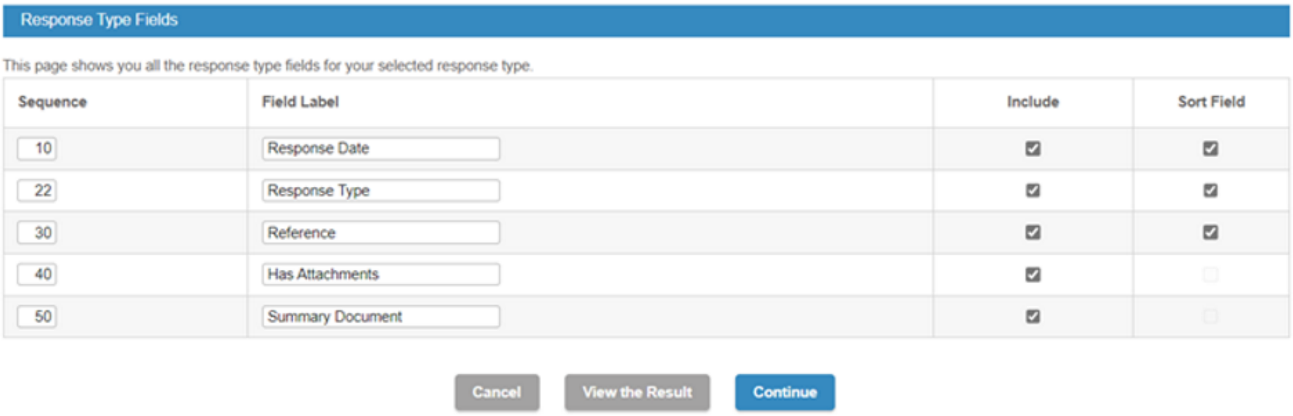
Response Type Fields

This page shows you all the response type fields for your selected response type.

Sequence	Field Label	Width	Mandatory
10	Response Types 2	15	☑
20	RFI Details	125	☑
25	Attachment Description	100	☐
30	Attachment	255	☐
50	Keep Name Private	1	☐

Figure 5: Admin >> Layout >> Page Layout >> ePathway Application Response >> [FINFO/RRESP/OBJCT] Layout.

The new SUMMARY Response Type Layout shown in Figure 6 allows selection of the fields which will display on the Response Summary Enquiry search results grid. At least one must be Included. The Sequence determines the order of the fields, the first of which will allow drill-down to the Detail screen and the Sort Field allows clicking on the results column header to change the sort order of the results.



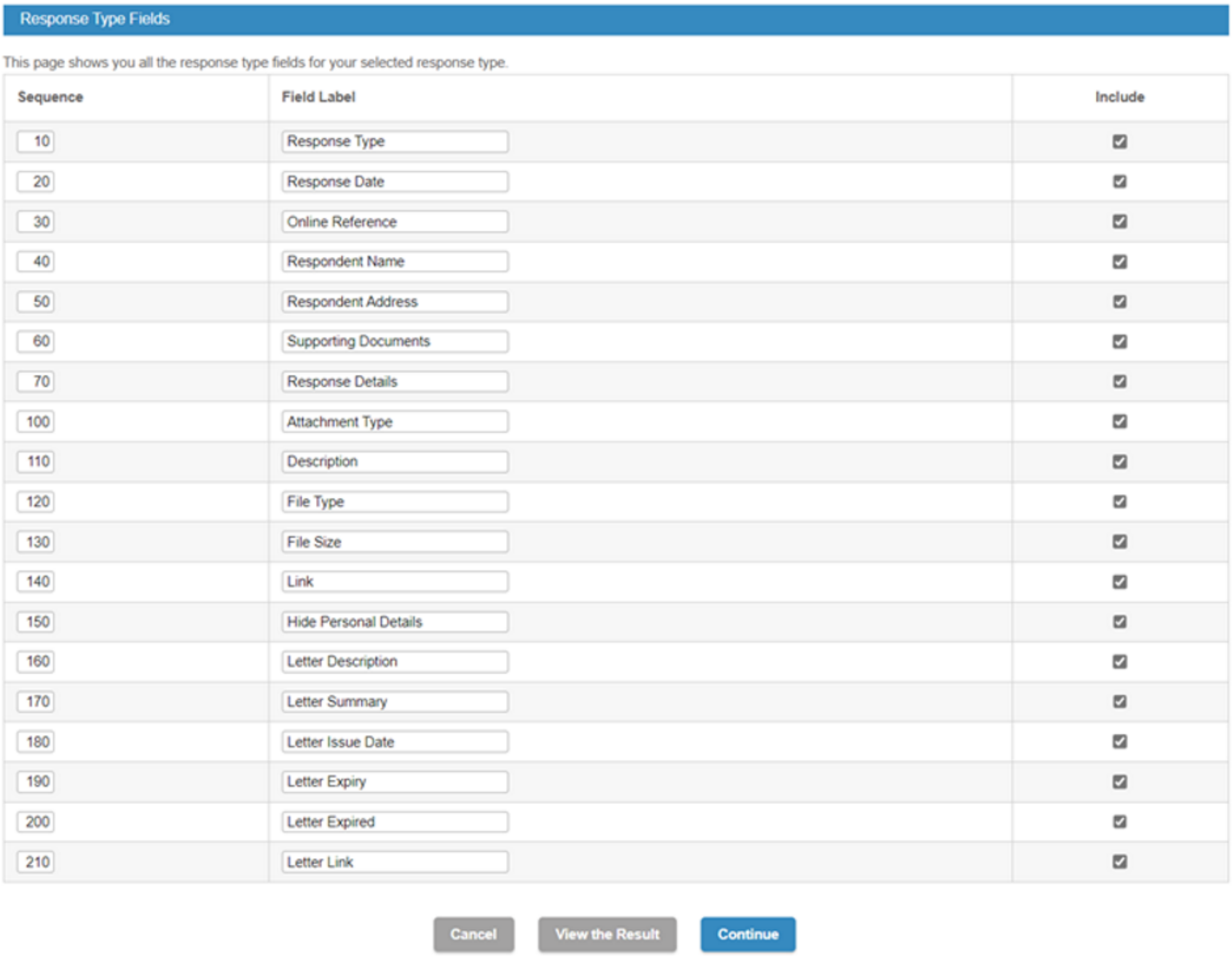
Response Type Fields

This page shows you all the response type fields for your selected response type.

Sequence	Field Label	Include	Sort Field
10	Response Date	☑	☑
22	Response Type	☑	☑
30	Reference	☑	☑
40	Has Attachments	☑	☐
50	Summary Document	☑	☐

Figure 6: ADMIN >> Layout >> Page Layout >> ePathway Application Response >> [SUMMARY] Layout.

The new DETAIL Response Type Layout shown in Figure 7 allows selection of the fields which will display on the Response Detail Enquiry screen. At least one must be Included. The Sequence determines the order of the fields.



Response Type Fields

This page shows you all the response type fields for your selected response type.

Sequence	Field Label	Include
10	Response Type	☑
20	Response Date	☑
30	Online Reference	☑
40	Respondent Name	☑
50	Respondent Address	☑
60	Supporting Documents	☑
70	Response Details	☑
100	Attachment Type	☑
110	Description	☑
120	File Type	☑
130	File Size	☑
140	Link	☑
150	Hide Personal Details	☑
160	Letter Description	☑
170	Letter Summary	☑
180	Letter Issue Date	☑
190	Letter Expiry	☑
200	Letter Expired	☑
210	Letter Link	☑

Cancel View the Result Continue

Figure 7: Admin >> Layout >> Page Layout >> ePathway Application Response >> Detail >> Layout.

Notes regarding specific fields which may become more obvious after viewing Figure 10 of the sample Response Detail Enquiry:

- The following fields (sequence 100-140 in Figure 7) all relate to Attachments and will appear within a grid on the details screen. As such, their order relative to each other, and not the other fields, is what is important in their instance:
  - Attachment Type – The Pathway attachment type description
  - Description – The description the user gave the attachment.
  - File Type – The extension of the attachment (E.g. PDF)
  - File Size – The attachment file size in bytes, KB, MB or GB as appropriate.
  - Link – If included, determines whether the icon to download the attachment will be present.

  NOTE: Attachments used by ePathway Responses are set up in a couple of places:
  - System Administration >> PaperClip Attachments >> Attachment Entity Maintenance - Attachment Entity CWPRESP. This contains the Attachment Types Responses will use and which Attachment Type is the default is also defined.
  - System Administration >> ePathway >> General Enquiry Parameters >> Applications Enquiry Parameters. Open Application Enquiry Stakeholder and Response Parameters to nominate the Attachment Types and which are to be publicly displayed.
- The "Letter *" fields (sequence 160-210 in Figure 7) relate to the details of the original letter (if relevant) that initiated the Response. E.g. The letter sent out to affected properties to prompt them for Information. The Letter Link, if included, determines whether an icon to download the letter will be present.

RESPONSES ENQUIRY USER EXPERIENCE

The ePathway Application Enquiry detail view screen now has the option to display the View Responses button as shown in Figure 8 as the third button at the bottom of the screen.

The label of the new button is influenced by ApplicationResponse.ExistingResponsesButton text code which can be tailored within Admin >> Layout >> Text >> Module Group: General Enquiry.

The button will only display if the Application does in fact have Responses against it and those responses belong to one of the assigned Response Types on the enquiry list the current Application is being enquired upon. If logged in as a public user, or else a non-Stakeholder for the Application, then only Response Types marked as Public will be viewable. See Figure 1 and 2 in previous section for configuring these Response Types.

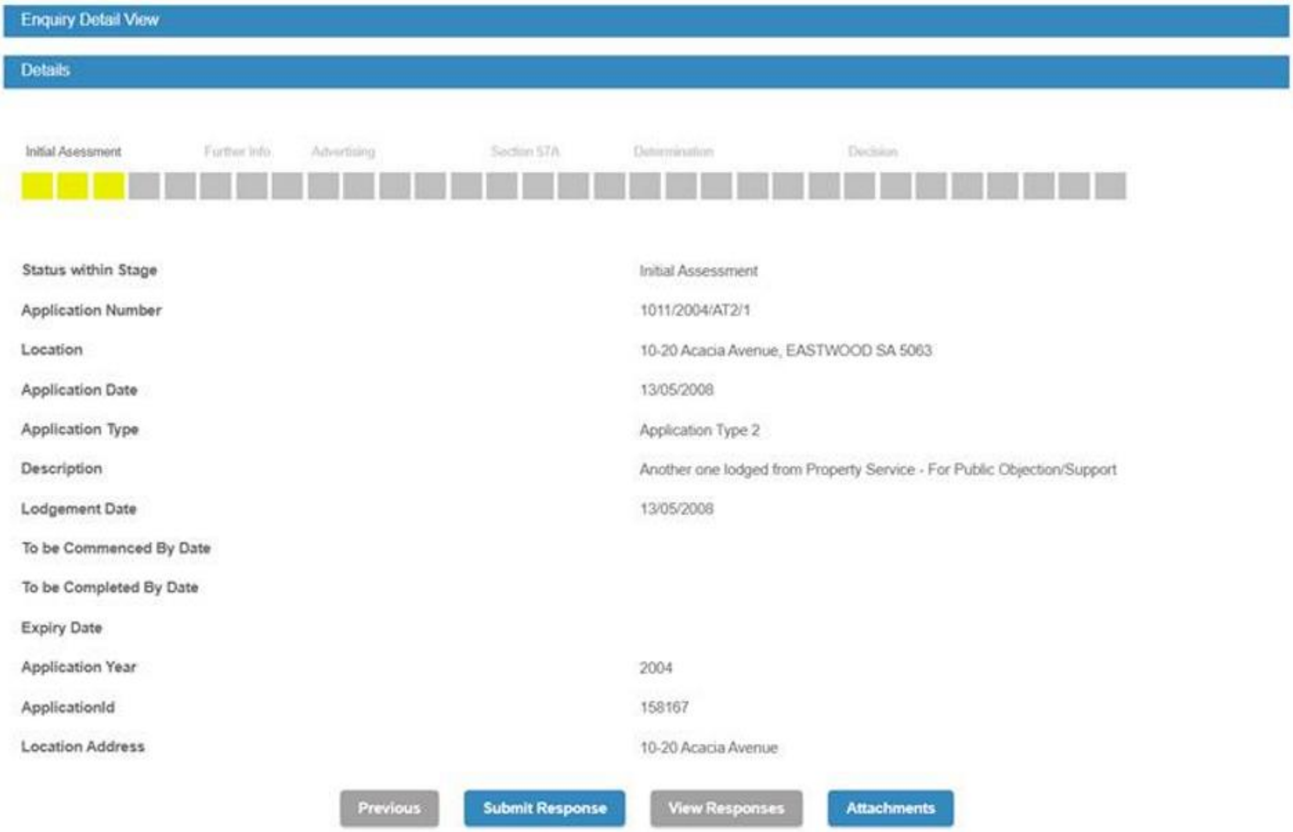


Figure 8: ePathway General Enquiry Applications detail screen.

Another means to access the new Responses enquiry screen as a registered ePathway user is by using the actions against an Application on the MyHome screen as shown in Figure 9. The presence of this action is governed by the same rules as the enquiry screen button.

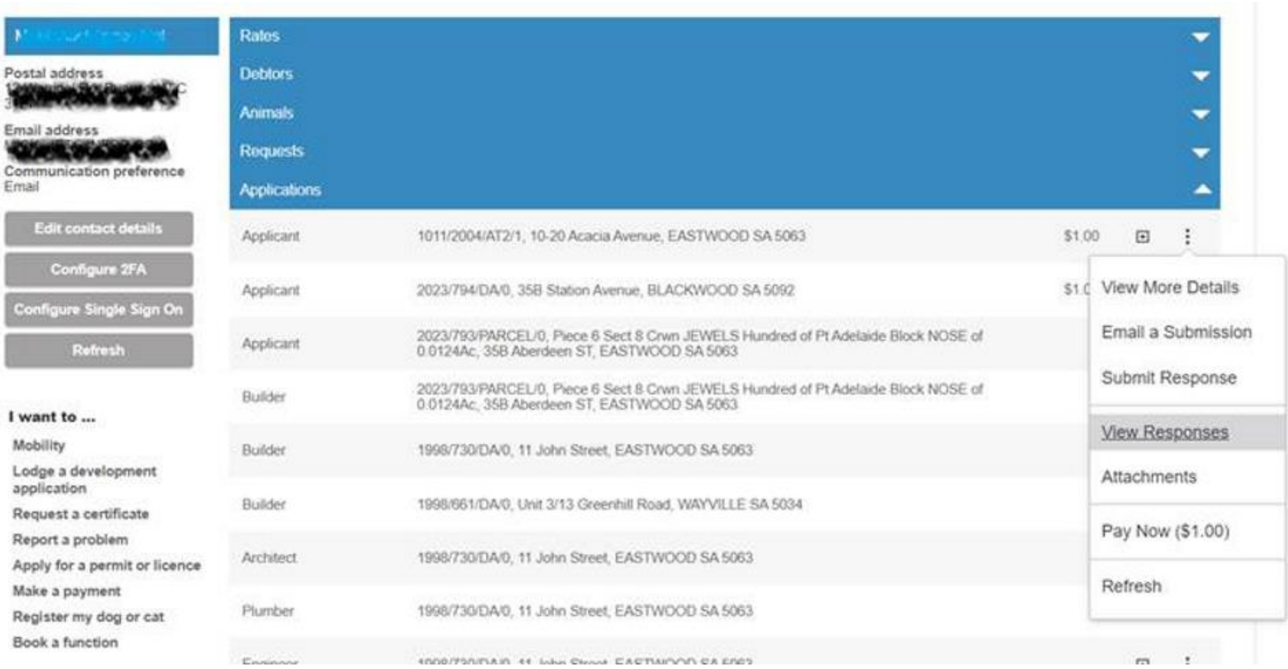


Figure 9: ePathway MyHome View Responses action.

The Responses Enquiry Summary screen will show all Responses available to view against the Application as shown in Figure 10.

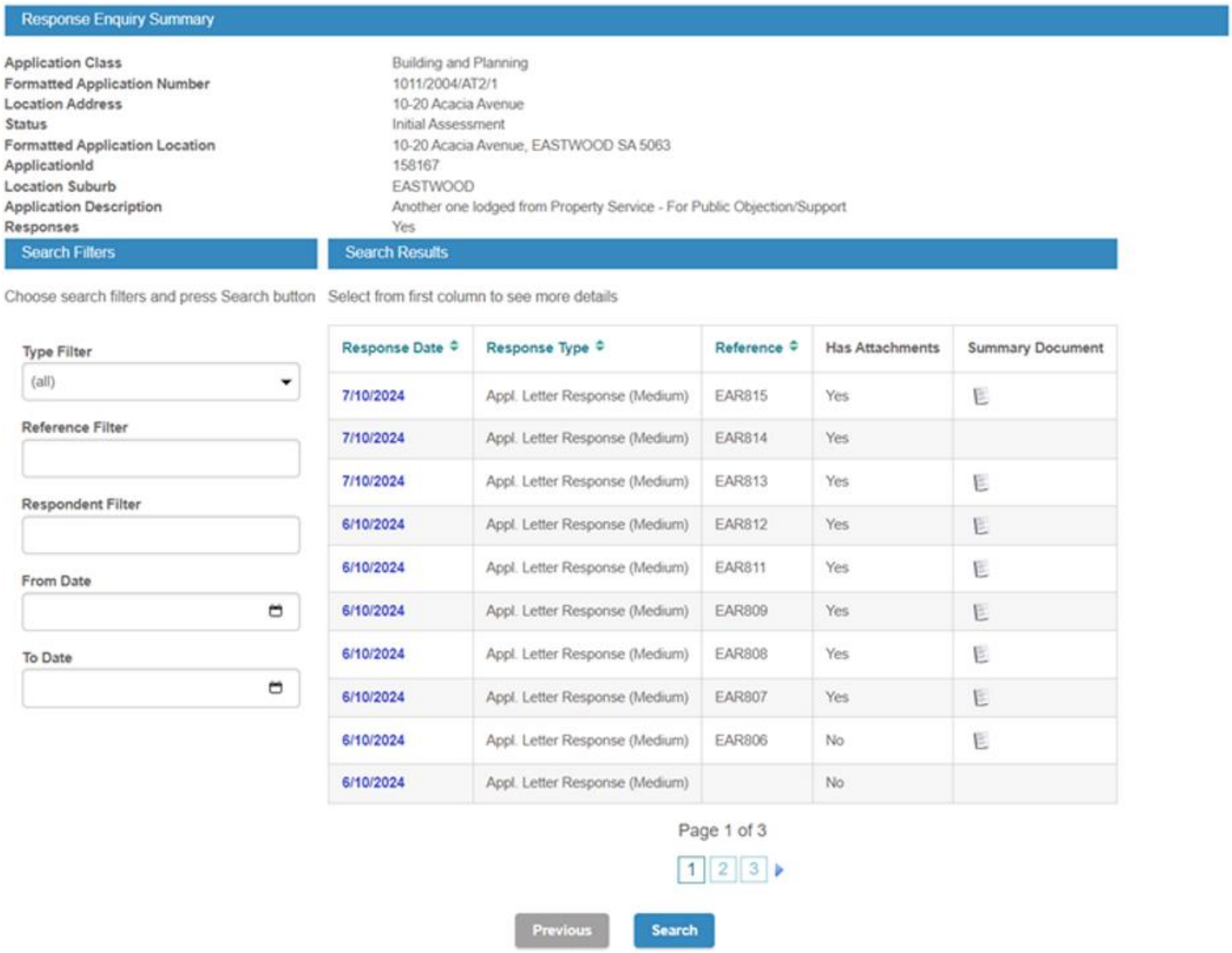


Figure 10: ePathway Responses Enquiry Summary screen.

The new summary screen has the following functions:

- The screen header and instructions (none defined in the example) are all determined by Layout parameters (see Figure 4 in previous section).
- Field selection, sequencing and labelling is all determined by Layout parameters (see Figure 6 in previous section).
- Sorting via the clickable headers on the first 3 columns can be used to sort the results by those fields. The ability to choose which fields can do this is determined by Layout parameters (see Figure 6 in previous section).
- The first column of the grid (in this example the Response Date) is clickable and will invoke the detail screen for the Response.
- Filter results by entering criteria in the Search Results section of the screen and clicking the Search button. One or more of the following can be specified:
    - Response Type Filter. Select from the drop-down list of possible response types available against this application.
    - Reference Filter. Can enter partial. E.g. 12 will match EAR012 and EAR123.
    - Respondent Name. Can enter partial. E.g. jack might match Jack Nurk and Missy Jackson)
    - Date From/To. Using date selector or typing.
- Inclusion of the new Response Summary details document. If available, the icon is shown as a document icon in the appropriate column of the grid. Selecting the icon will open/download the document.
- Pagination control displays beneath the results grid if the results grid has more than one page of results.

The following Text Codes are used on the Summary screen (via ADMIN >> Layout >> Text >> Module Group: General Enquiry):

Code	**Default**	**Where/When Used**
GeneralEnquiry. NoResponsesSummary	There were no matching responses found.	Message displayed when no Responses match the entered filters
GeneralEnquiry. NewResponsesSearch	Search	Button label to execute search
GeneralEnquiry. SelectResponseType	Type Filter	Label for Response Type filter selector
GeneralEnquiry. ReferenceFilter	Reference Filter	Label for Reference filter field
GeneralEnquiry. RespondentNameFilter	Respondent Filter	Label for Respondent name filter field
GeneralEnquiry. ResponseSearchHeading	Search Filters	Heading for panel region that contains all the search filter controls.
GeneralEnquiry. ResponseSearchInstructions	Choose search filters and press Search button	Instructions for search
GeneralEnquiry. ResponseResultsHeading	Search Results	Heading for panel region that contains the search results.
GeneralEnquiry. ResponseResultsInstructions	Select from first column to see more details	Instructions/information for results
GeneralEnquirySearch. DateSearchFromDate	From Date	Existing! Used on enquiry search as well as here for date filtering From field.
GeneralEnquirySearch. DateSearchToDate	To Date	Existing! Used on enquiry search as well as here for date filtering From field.

Clicking on the first column allow the Response details to be shown for the chosen Response as shown in Figure 11.

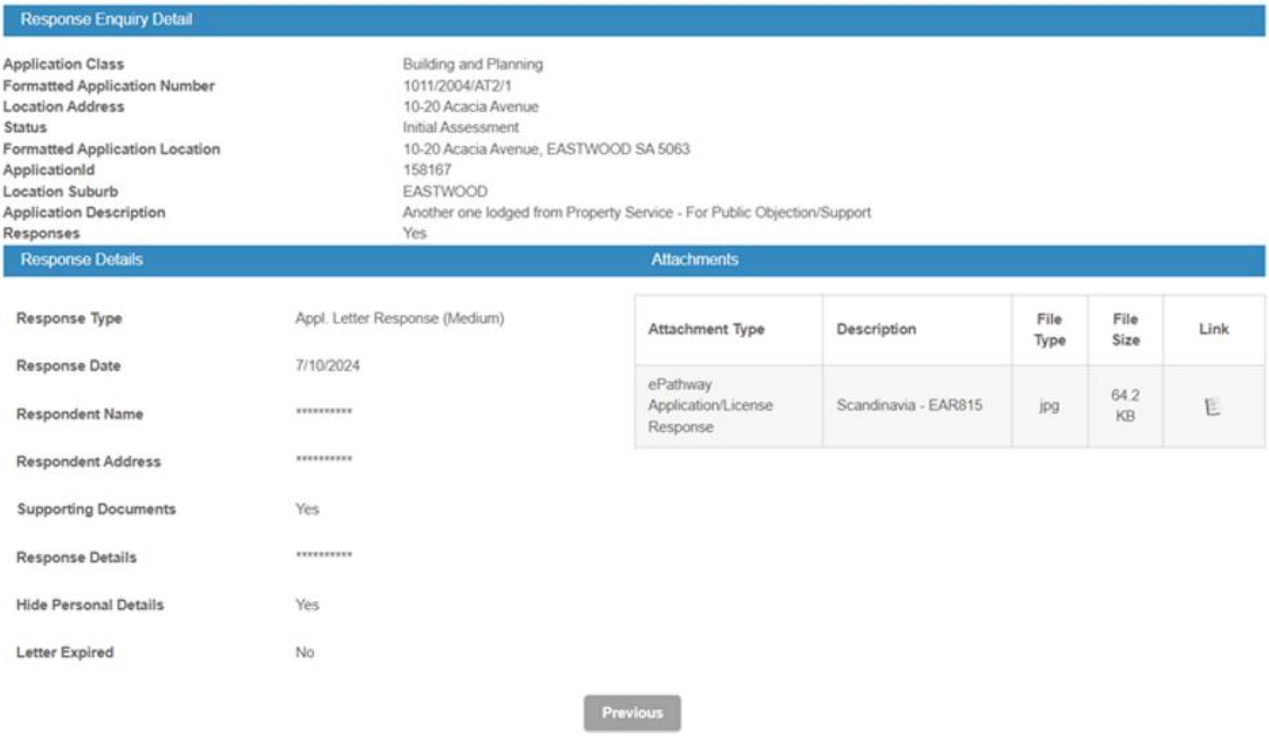


Figure 11: ePathway Responses Enquiry Detail screen (Private).

The new detail screen has the following functions:

- The screen header and instructions (none defined in the example) are all determined by Layout parameters, see Figure 4 in previous section.
- Field selection, sequencing and labelling is all determined by Layout parameters, see Figure 7..
- Grid Display of associated attachments (labels also determined by Layout parameters) with option to download the attachment via the icon.
- Viewing of the originating Letter (not present in the example.) E.g. The RFI, Referral or Objection notice.
- Toggling of privacy setting for the Response if the current user is the person who submitted the response i.e. The Stakeholder.
- Hide sensitive details such as Name, Address and Response Summary, if the Response is marked as private and current user is not the response stakeholder.
  NOTE: The text used to mask the fields is set by Name.PrivateMessage and is shown as asterisks in the example.

The following Text Codes are used on the Detail screen via Admin >> Layout >> Text >> Module Group >> General Enquiry:

Code	Default	Where/When Used
Name.PrivateMessage	**********	Text displayed instead of sensitive information (i.e. Name, Address, Summary text)
GeneralEnquiry. ResponsesPrivateButton	Make Private	Button label to make the current response Private (Only available if registered user is the stakeholder/creator of the response).
GeneralEnquiry. ResponsesPublicButton	Make Public	Button label to make the current response Public (Only available if registered user is the stakeholder/creator of the response).
GeneralEnquiry. ResponseDetailsHeading	Response Details	Label for area of the screen containing all the Response details.
GeneralEnquiry. ResponseDetailsInstructions	(blank)	Instructions for Response details
GeneralEnquiry. ResponseAttachmentsHeading	Attachments	Label for area of the screen containing the attachments.
GeneralEnquiry. ResponseAttachmentsInstructions	(blank)	

Figure 12 is an example of an enquiry on a different Response to the previous example, as a Stakeholder of the Application. In this instance, the name and other sensitive details are shown, and the ability to change the privacy settings via the Make Private button becomes available, or Make Public if it were already hidden. The letter details and icon are also present as this Response was triggered by a request for further information mail out.

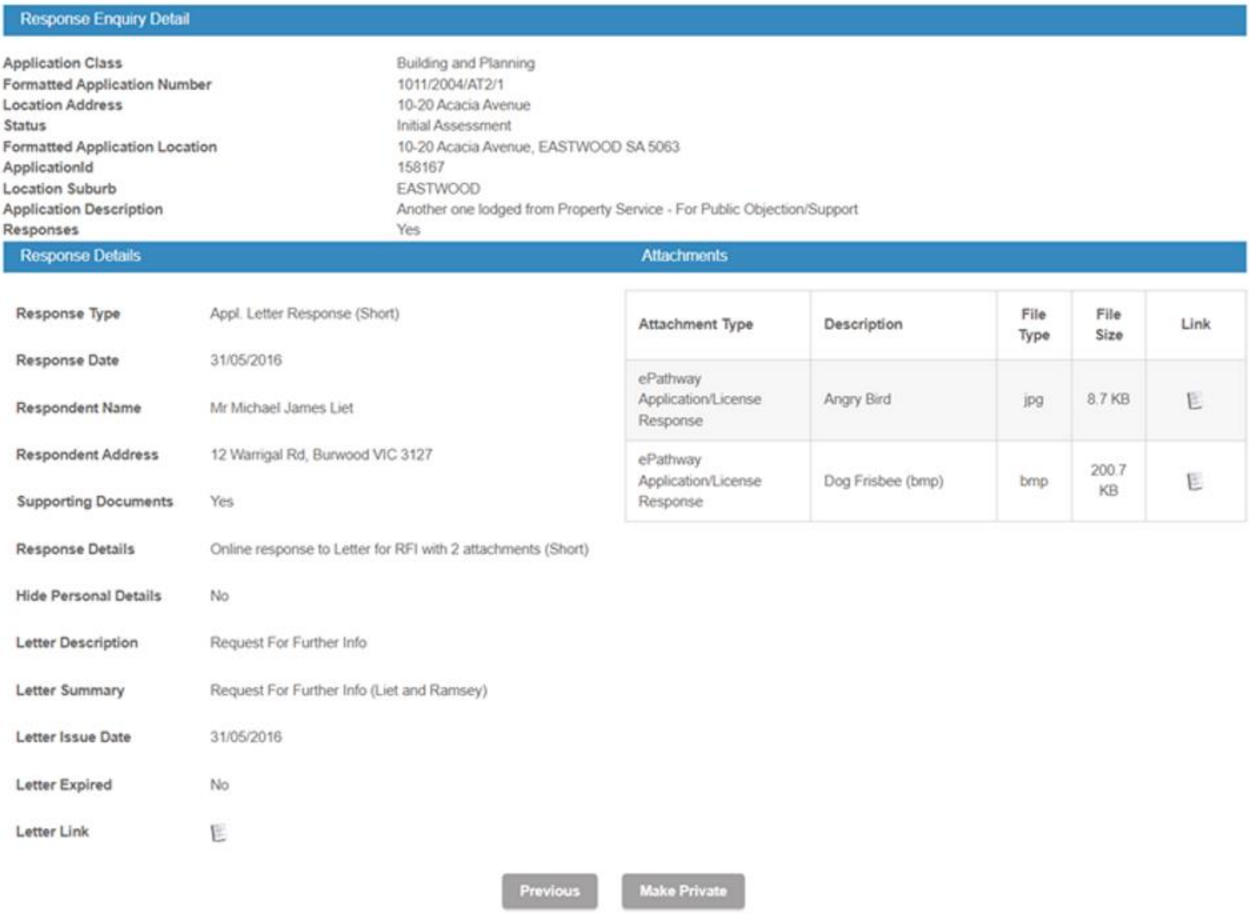


Figure 12: ePathway Responses Enquiry Detail screen as Stakeholder.

Lastly, the Response lodgement confirmation screen, Figure 13 has been altered to include a check box for the user to nominate whether the new response is to be marked as private. The label is determined by: Admin >> Layout >> Page Layout >> ePathway Application Response >> FINFO/RRESP/OBJCT Layout >> Keep Name Private field.

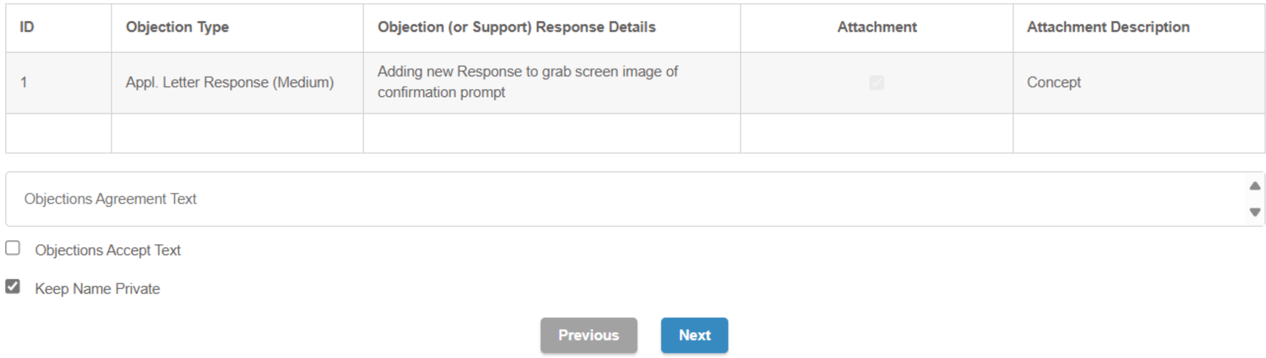


Figure 13: Responses lodgement confirmation privacy checkbox.

NOTE:

- The Reference added to the Application is also added as a Reference to the Response itself. This allows filtering both within ePathway, and now within Pathway UX to more easily identify a Response.
- Attachments added during Response lodgement now have the Reference added to their description so they can be more easily identified.

NOTE: This function will be available only to sites who have the required authority. Contact your Account Manager if your site requires this new functionality.

Applications Enquiry Parameters

Case:	Work Item: 63531
UX Client	ERS:

RESPONSE TYPE

The Response Type parameter for ePathway Applications will now open without an error message.

Inspections

Inspection Parameters

Case: UX Client	Work Item: 62329 ERS:

QUESTIONNAIRE MAINTENANCE

The Question Number and Question fields are now mandatory, so that an error is not displayed when attempting to save a new question. The numbering logic has also been updated to allow for questions to be reordered based on a new number being entered for a Question.

Inspections Maintenance

Case: WODO CS0395625 UX Client	Work Item: 64733 ERS:

INSPECTION MAINTENANCE

Inspection Maintenance has been corrected so that it does not incorrectly detect a change after Save.

Licensing

Business Event Notifications and SMS Notifications Integration

Case: UX Client	Work Item: 63475 ERS: 108363

LICENSING

***** Authorised Function *****

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

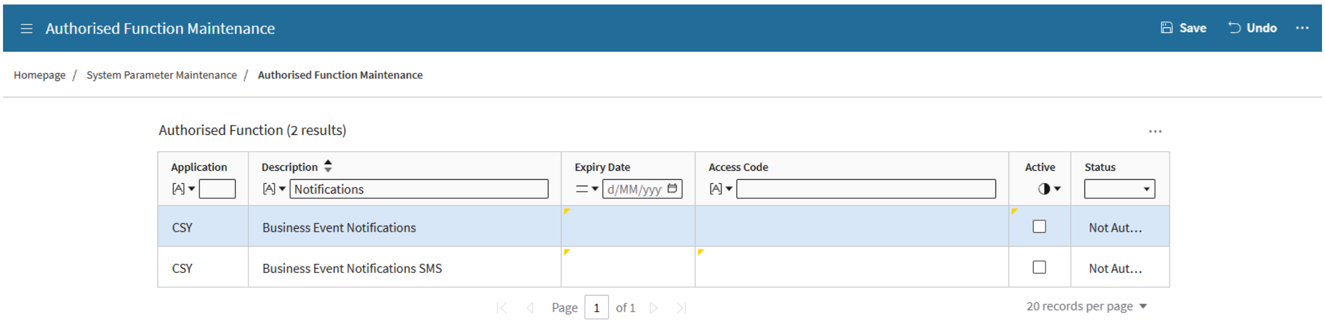


Figure 1

The existing Pathway Authorised Function, Business Event Notifications (BEN), has been expanded to allow notifications from Licensing. Business Event Notifications are used to automatically send system generated email notifications. Emails may be addressed to customers or other stakeholders with a Name Role in the NAR or ad hoc email addresses e.g. stored in the References entity of the Licence record. This functionality facilitates notifications of changes to Licence records to interested parties e.g. a change to the status of a licence.

Business Event Notifications SMS has been developed to automatically send system generated SMS notifications to a mobile phone number. SMS notifications may be sent to customers with a Name Role in the NAR. Like email notifications, SMS notifications facilitate notifications of creation and changes to Licence records to interested parties e.g. new licence, a change to the status of a licence.

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

Before the Notifications option can be accessed it must be first be assigned to individual licensing classes (Licensing >> Licensing Classes >> [Class] >> Class Authorities option) and to a responsibility group within the class's responsibility structure (Licensing >> Licensing Classes >> Class >> Group Authorities option).

There are several configuration elements which are outlined below:

- System Administration >> Integration >> API Endpoints >> API Endpoint Maintenance – set up the API endpoint for the SMS provider, at present, the only supported provider is Twilio.
- System Administration >> Integration >> SMS >> SMS Provider Maintenance – set up the SMS provider account details and configuration information.
- Systems Administration > System Parameter Maintenance System Administration >> Integration >> System Parameter Maintenance - selection of an active SMS provider
- System Administration >> System Parameters >> ION Parameters – where the Auto Publish Application and Licence Notifications business object definition and its event triggers are defined
- Licensing >> Application Parameters >> Notifications >> Data Transformer Maintenance – set up more advanced criteria and filtering using eXtensible Stylesheet Language Transformations (XSLT). This is optional.

- Licensing >> Application Parameters >> Notifications >> E-mail Template Maintenance – set up the email templates using plain text, HTML or data transformer data.
- Licensing >> Application Parameters >> Notifications >> SMS Template Maintenance – set up the SMS templates using plain text or “Text” data transformer data.
- Licensing >> Application Parameters >> Notifications >> Notification Type Maintenance – set up the types of notifications required.

ION Noun Verb Maintenance

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

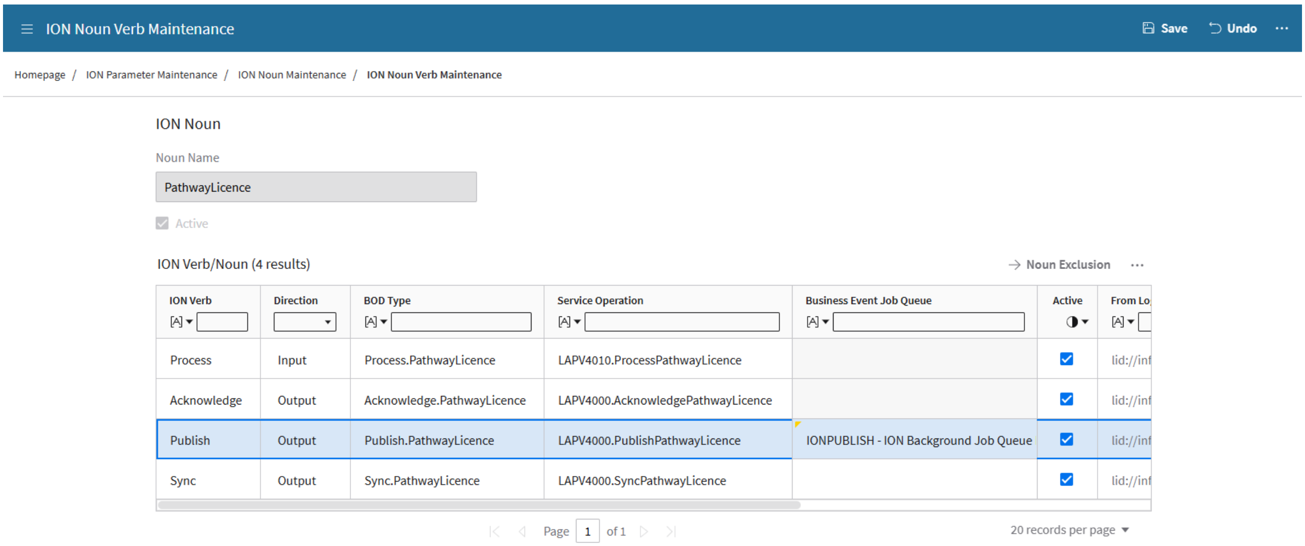


Figure 2

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

- Extract e-mail addresses from licence data for e-mail notification delivery.
- Extract mobile phone number from licence data for SMS notification delivery.
- Provide filtering data to control notification triggering.
- Extract Pathway merge data for notification message content.

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

Business Object Definition Maintenance

Business Object Definition Maintenance is accessible from the System Administration >> System Parameters >> ION Parameters menu option and are used to define the conditions under which the Publish verb’s service operation will be triggered. The release upgrade sets up a default business object definition, labelled Auto Publish Application and Licence Notifications, for this purpose.

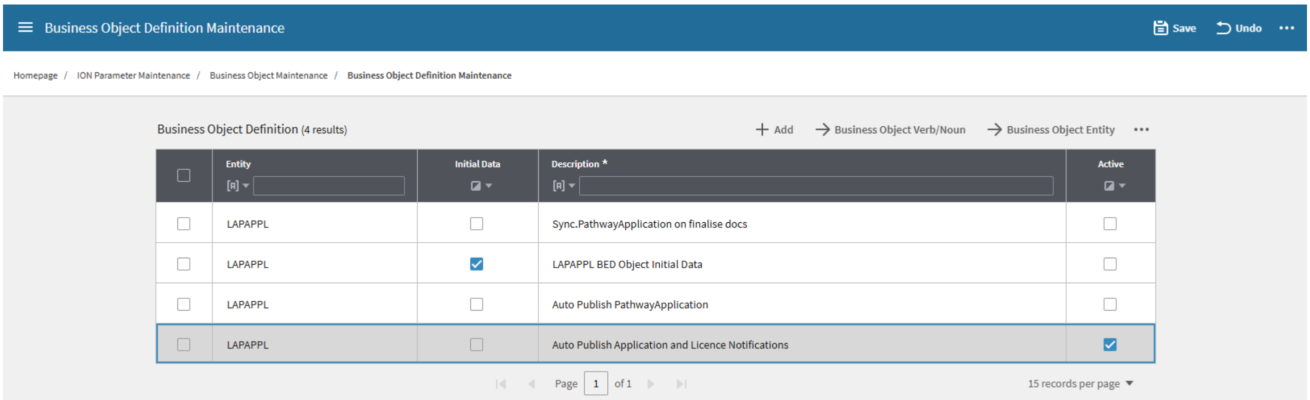


Figure 3

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

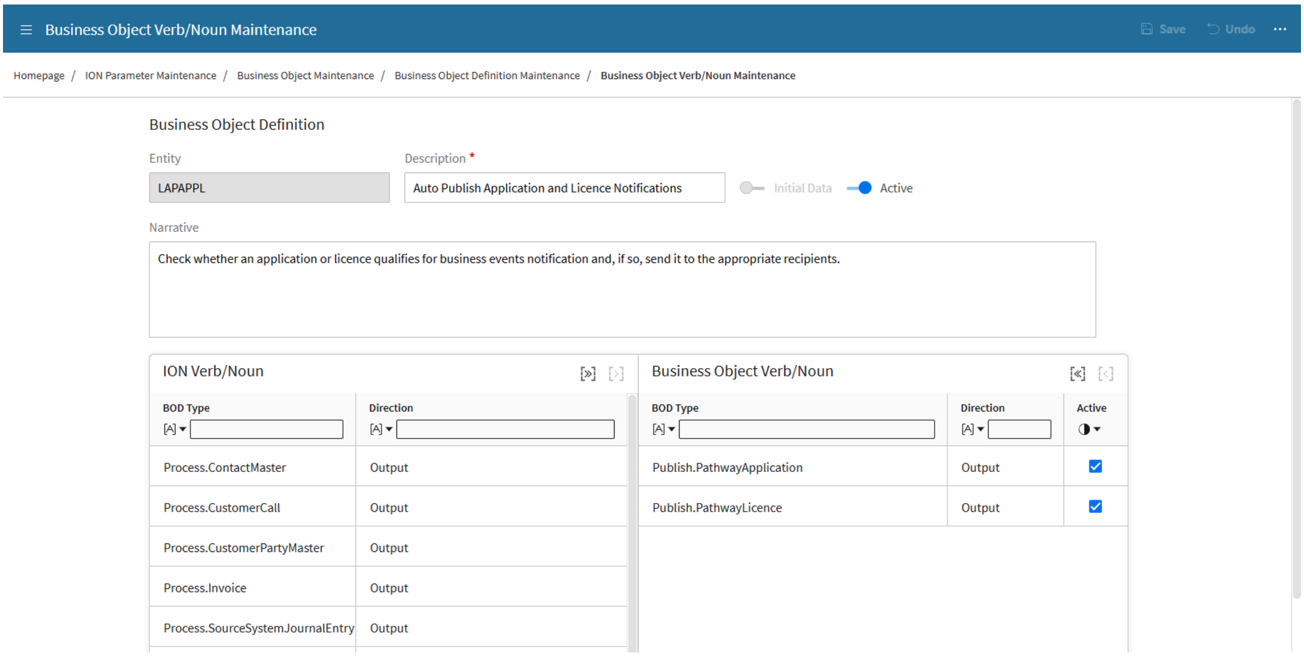


Figure 4

Generally, the Auto Publish Application and Licence Notifications service operation should be activated when events such as licence creation and status updates occur.

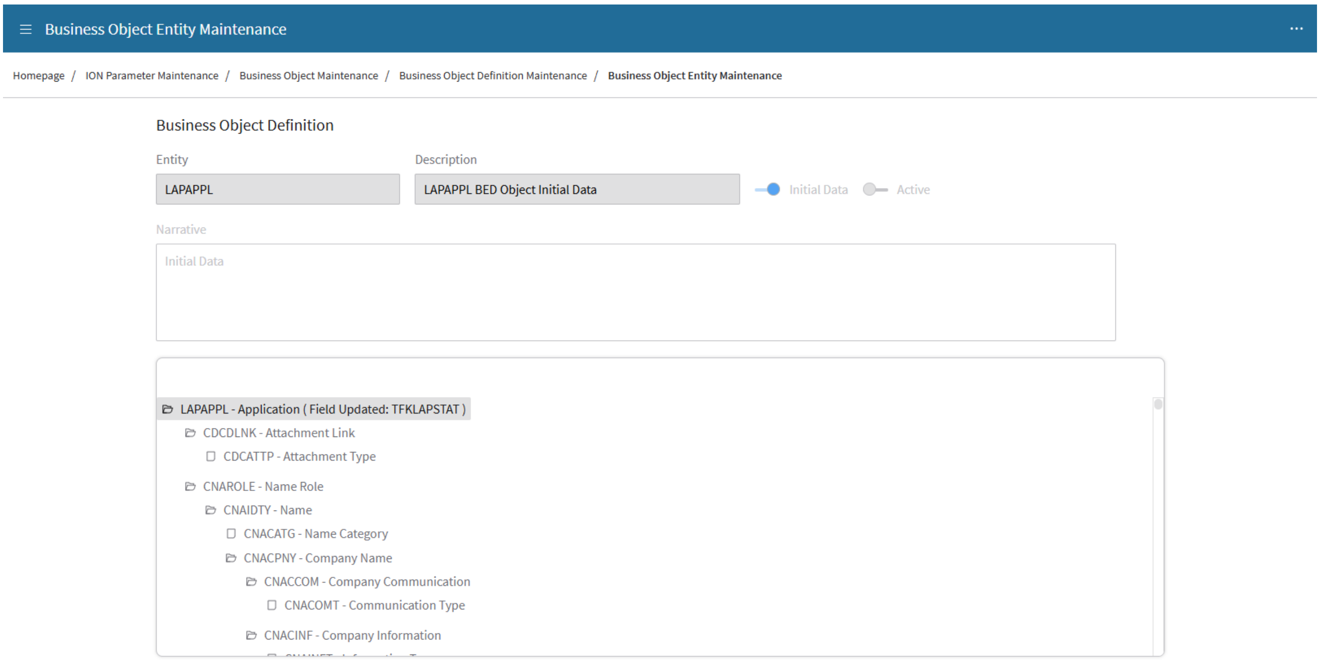


Figure 5

NOTE: The triggering of the Publish.PathwayLicence service operation does not necessarily mean that Business Event Notification processing will take place immediately. For example, if no contact details are found on the licence, no further processing will be undertaken. Instead, another job will be submitted to the business event job queue so that the licence can be checked again later. Attempts to send an email or SMS will be made for up to three days if initially unsuccessful.

Deploy Business Events

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

Licensing Notification Parameters

A new Notifications option has been added to Licensing Parameters. Before the Notification option can be accessed it must first be assigned within the Licensing >> Licensing Classes >> Class >> Class Authorities and Group Authorities options.

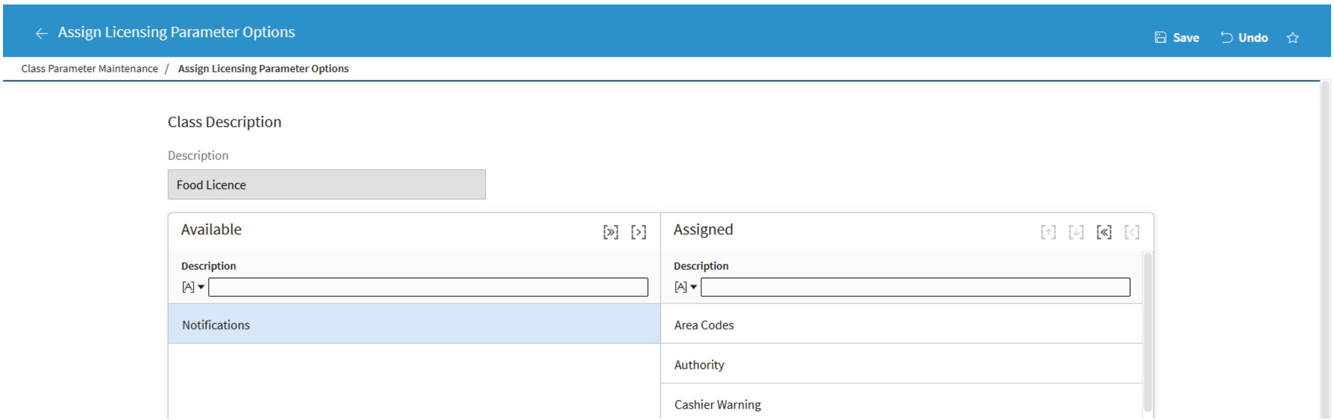


Figure 6

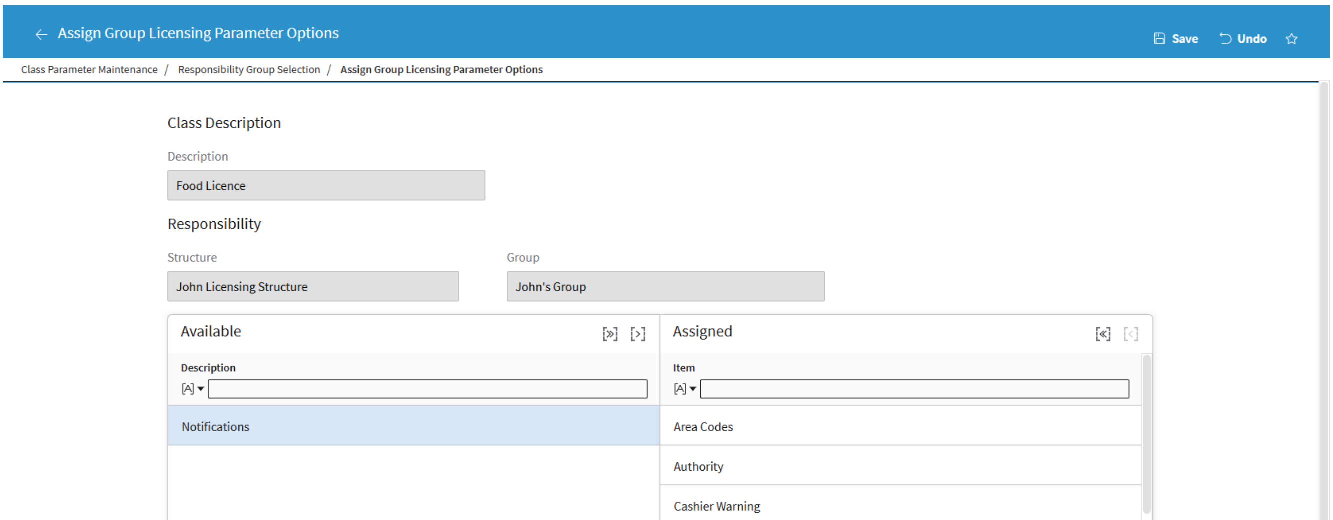


Figure 7

Once that's done, the Notifications option will appear in the Licensing >> Licensing Parameter for the selected licence class.

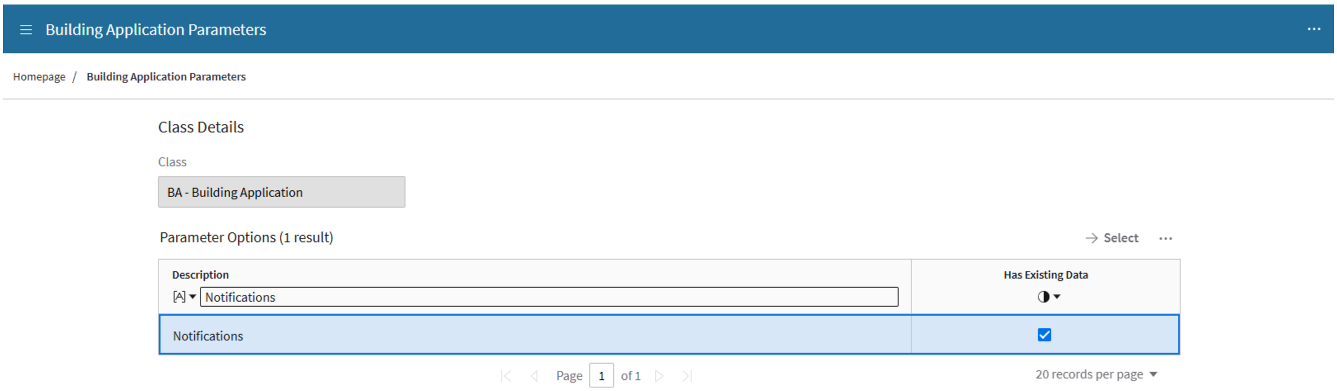


Figure 8

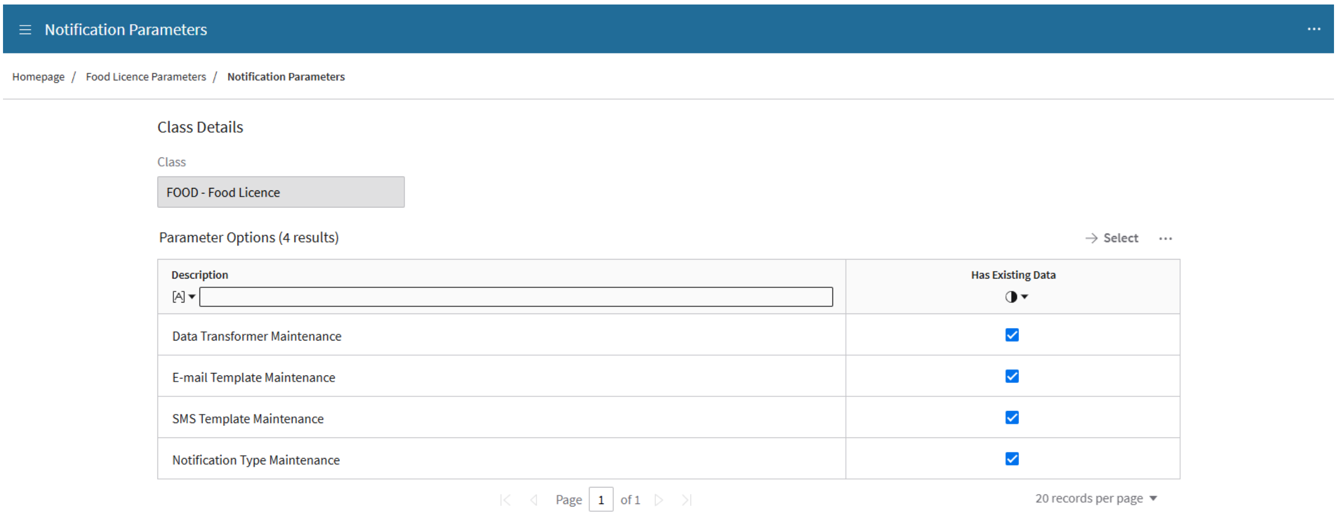


Figure 9

Data Transformer Maintenance

Data Transformer Maintenance enables sites to define transformations in eXtensible Stylesheet Language (XSL) to be applied to PathwayLicensing ION noun data. In turn, this enables the construction of sophisticated HTML and plain text message templates and allows advanced filtering when checking whether a notification should be sent at all. The version of XSLT (XSL Transformations) used is 1.0, as that is what is available with the .NET Framework.

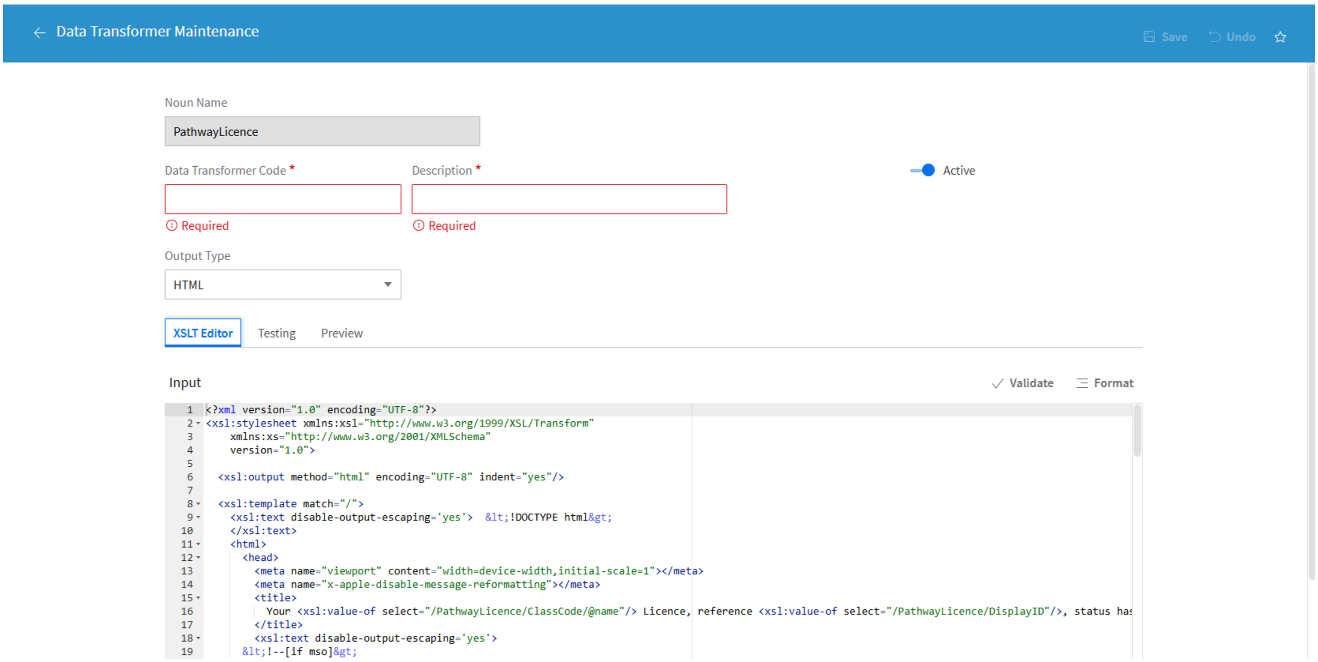


Figure 10

Noun Name
This is the business object to which the data transformer applies.

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

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

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

Output Type
A drop-down that indicates the format in which the XSLT transformer will output converted PathwayLicensing XML data. The allowed values are:

- Contacts – the output will be an XML list of contact details extracted from the Business Object Definition (BOD), conforming to the following schema:

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

```
</xs:schema>
```

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

XSLT Editor

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

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

Testing

This tab provides a dual panel, divided by a splitter control, for testing the transformation coded in the XSLT Editor tab. Again, it reflects the design of the corresponding mapping editor tab in ION Desk, as shown in Figure 11.

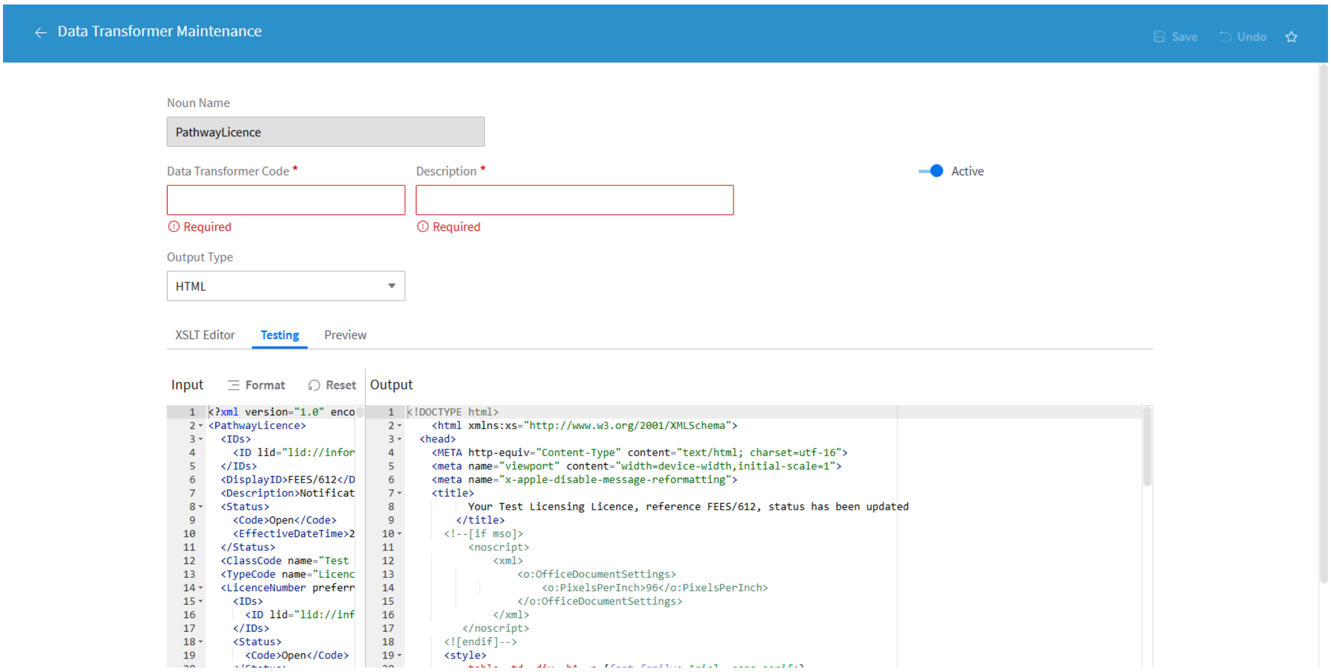


Figure 11

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

Preview

This tab applies when the Output Type field value is HTML. If selected, an inline frame within the tab renders the current HTML code in the Testing tab's Output panel editor, showing the user what an e-mail based on the data transformer would look like Figure 12:

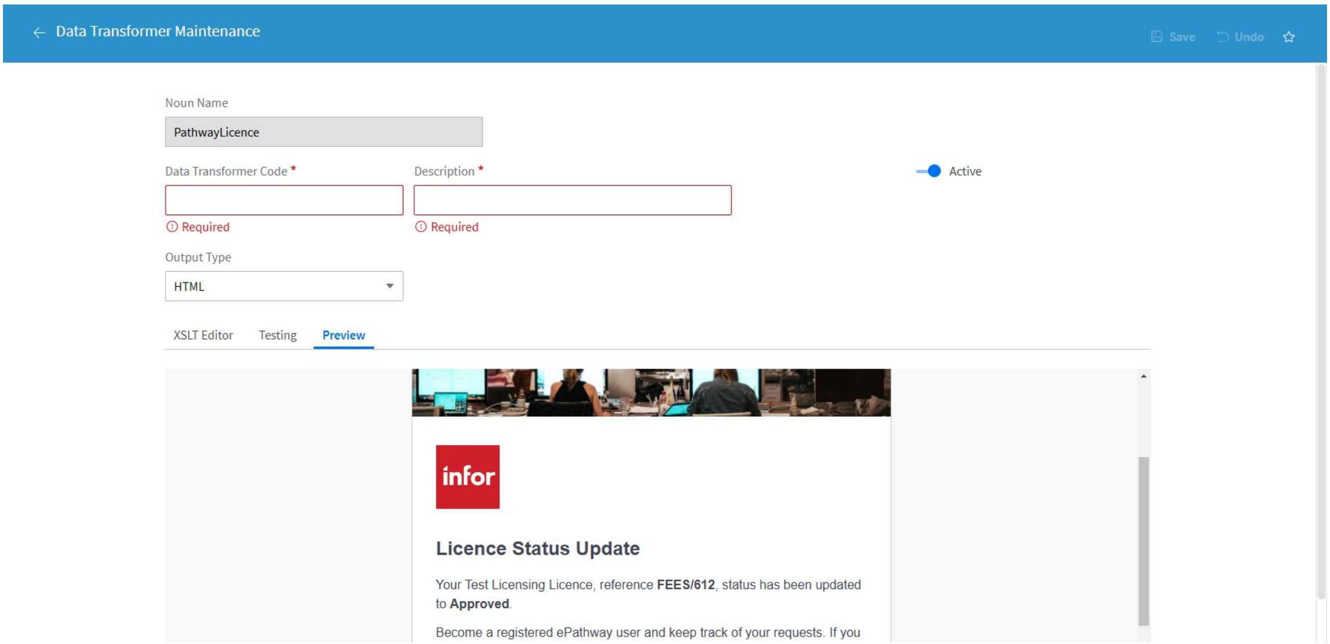


Figure 12

E-mail Template Maintenance
E-mail Template Maintenance enables sites to define an e-mail template to be associated with the PathwayLicensing noun. The e-mail template will be used to construct the e-mail notifications sent to the contact.

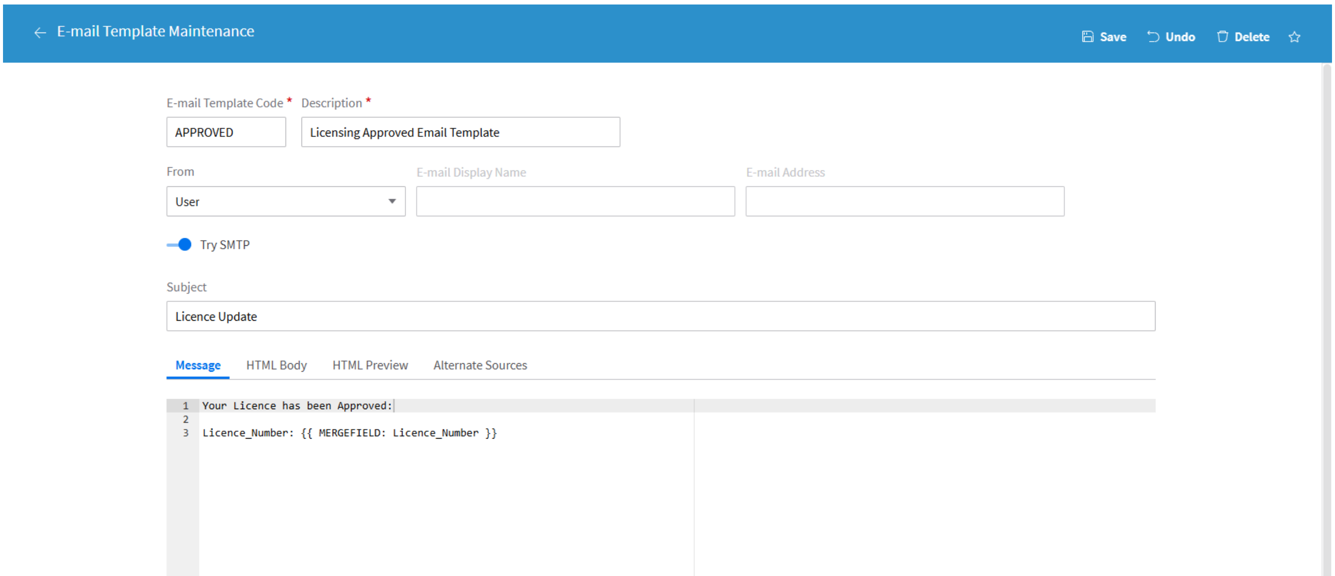


Figure 13

E-mail Template Code
A unique alphanumeric value of up to ten characters identifying the template.

Description
Up to fifty mixed-case characters further describing the e-mail template.

From

This drop-down field identifies the source of the sender's name and address to be associated with all messages based on the template and sent via SMTP. The possible values are:

- Administrator – The sender's name and address are taken from the mail server administrator E-mail Display Name and E-mail Address field values in the System Administration >> System Parameters >> Mail and Fax Server Maintenance menu option.
- Other – The sender's name and address are taken from the E-mail Display Name and E-mail Address field values against the e-mail template.
- User – The sender's name and address are taken from the Pathway user record of the user initiating the process that sends the message.

E-mail Display Name
A human-friendly name that identifies the message sender, e.g. Jane Smith. This field is only available when the From field is Other.

E-mail Address
The message sender's address in SMTP format, e.g. jane.smith@council.gov.au. This field is only available when the From field is Other.

Try SMTP
Specifies that the E-mailing module should always attempt to send messages based on the template via SMTP rather than MAPI. This allows a particular From address to be specified on plain text messages. Otherwise, messages are only sent via SMTP if an HTML Body value is provided. If sending the message via SMTP fails for some reason, an attempt is still made to send it via a MAPI client, e.g. Outlook. However, in this case, the From address will always be that of the user logged on to the MAPI client.

Subject
The e-mail subject text to use in messages based on the template. The text can include merge fields for incorporating Pathway data in messages at the time of sending, as detailed later.

Message
The plain body text to use in messages based on the template. As with the subject field, this can include merge fields for incorporating Pathway data in messages at the time of sending.

The Message field can accommodate an ample number of characters for an e-mail message body, with letters allowed in mixed case. (The message length is effectively unlimited).

When the right-click menu is displayed while the Subject or Message field has focus, a list of available merge fields is displayed.

Selecting a merge field right-click menu option inserts the {{ MERGEFIELD: <fieldname> }} in the position of the cursor within the field with focus.

HTML Body
HTML code defining a rich text body to use in messages based on the template. The text can include the previously mentioned merge fields and image fields for incorporating embedded images, as detailed later.

The HTML Body field can accommodate an ample number of characters for an HTML e-mail message body, with letters allowed in mixed case. The message length is effectively unlimited.

When the right-click menu is displayed while the HTML Body field has focus, a list of available merge fields is displayed.

Selecting a merge field right-click menu option inserts the {{ MERGEFIELD: <fieldname> }} in the position of the cursor within the field with focus.

When the right-click menu is displayed while the HTML Body field has focus, there is an additional "Insert image…" option.

Selecting the "Insert image…" option displays the Open dialog (allowing selection of an image file to encode and insert). The allowed file extensions are JPG, JPEG, GIF, PNG, BMP and "*" i.e. all files.

To insert an image in the HTML Body field, add <img src=""> then place your cursor inside the double quotes. Access the right-click menu, select Insert Image then choose an image file (the file data will be inserted into the field in base64 encoding).

HTML Preview
This tab applies when an HTML Body has been specified. If selected, an inline frame within the tab renders the current HTML code in the Testing tab's Output panel editor, showing the user what an e-mail based on the HTML Body would look like.

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

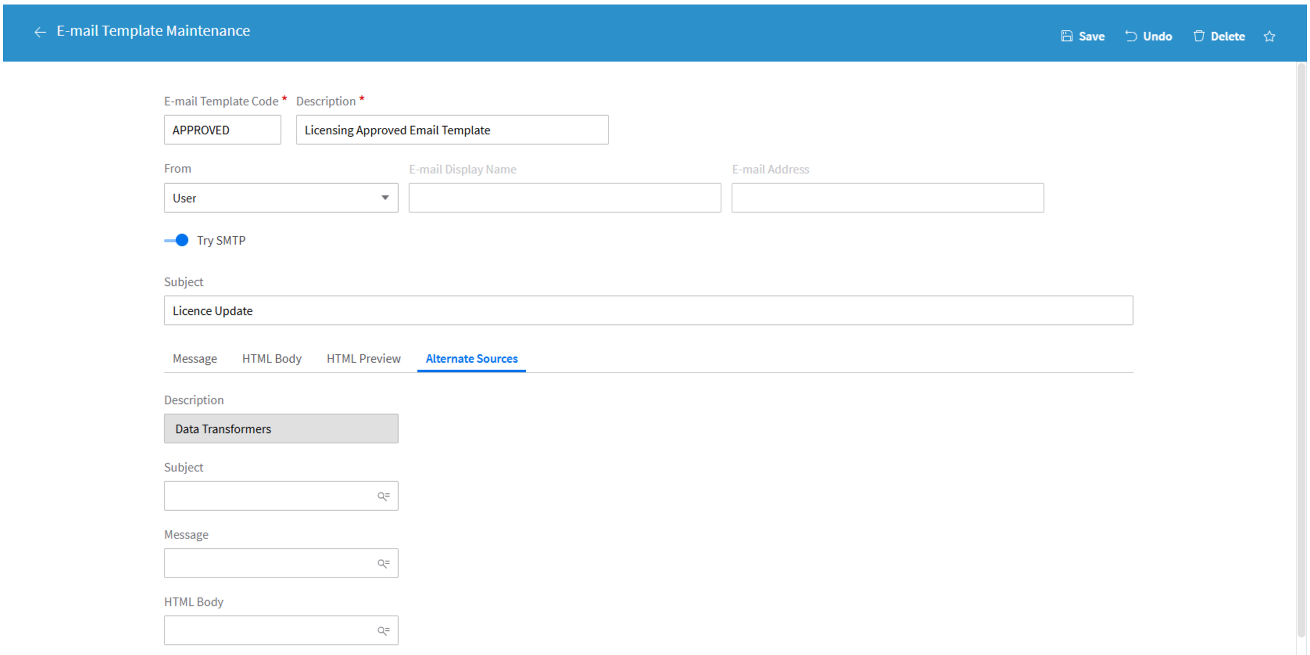


Figure 14

SMS Template Maintenance
SMS Template Maintenance allows sites to define an SMS template to be associated with the PathwayLicensing noun. The SMS template will be used to construct the SMS notifications sent to the contact.

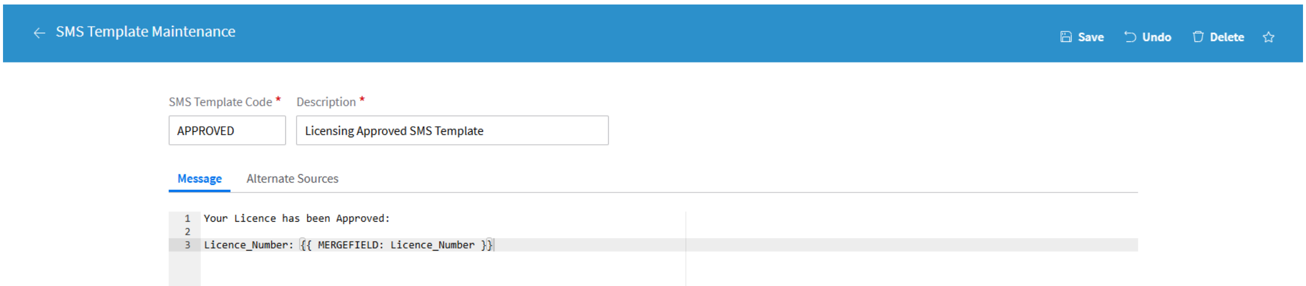


Figure 15

SMS Template Code
A unique alphanumeric value of up to ten characters identifying the template.

Description

Up to fifty mixed-case characters further describing the e-mail template.

Message
The plain body text to use in messages based on the template. This can include merge fields for incorporating Pathway data in messages at the time of sending.

The Message field can accommodate an ample number of characters for an e-mail message body, with letters allowed in mixed case. The message length is effectively unlimited.

When the right-click menu is displayed while the Subject or Message field has focus, a list of available merge fields is displayed.

Selecting a merge field right-click menu option inserts the {{ MERGEFIELD: <fieldname> }} in the position of the cursor within the field with focus.

Alternate Sources
Where the message alternate source field has been specified, the value supplied by the alternate message data source will override whatever has been generated for the standard message template field. The Alternate Sources Message field will only allow Text based data transformer selections because an SMS can only allow plain text.

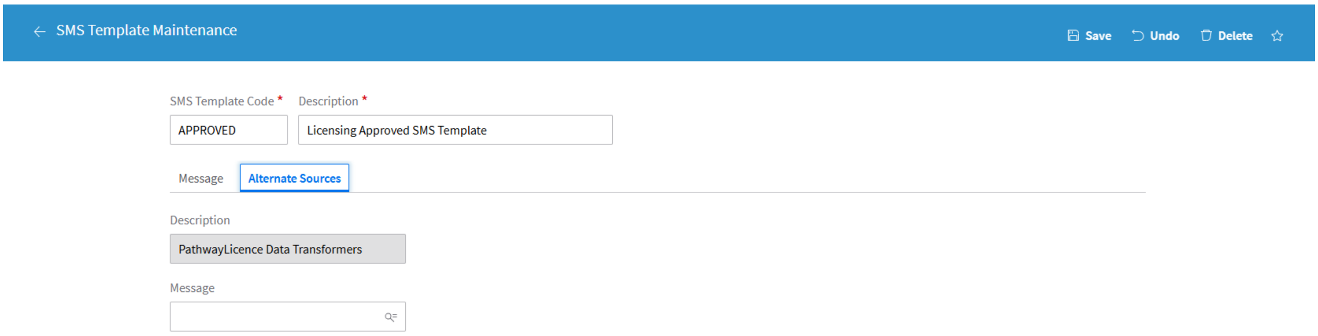


Figure 16

Notification Type Maintenance
Notification Type Maintenance allows the definition of an ordered list of PathwayLicensing notification types to check when events defined in Business Object Entity Maintenance trigger the Publish verb's service operation. If the Publish verb is cleared for processing for a given licence, each notification type in the list will be checked in order and, if the filter criteria are met, an e-mail message or SMS message, or both will be sent to each relevant contact.

All e-mail messages sent are available for enquiry in both the System Administration >> System Parameters >> E-mail Message Enquiry menu option and the Licensing >> Licensing Maintenance >> E-mail History summary option for the relevant licence.

All SMS messages sent are available for enquiry in both the System Administration >> Integration >> SMS >> SMS History menu option and the Licensing >> Licensing Maintenance/Enquiry >> SMS History summary option for the relevant licence.

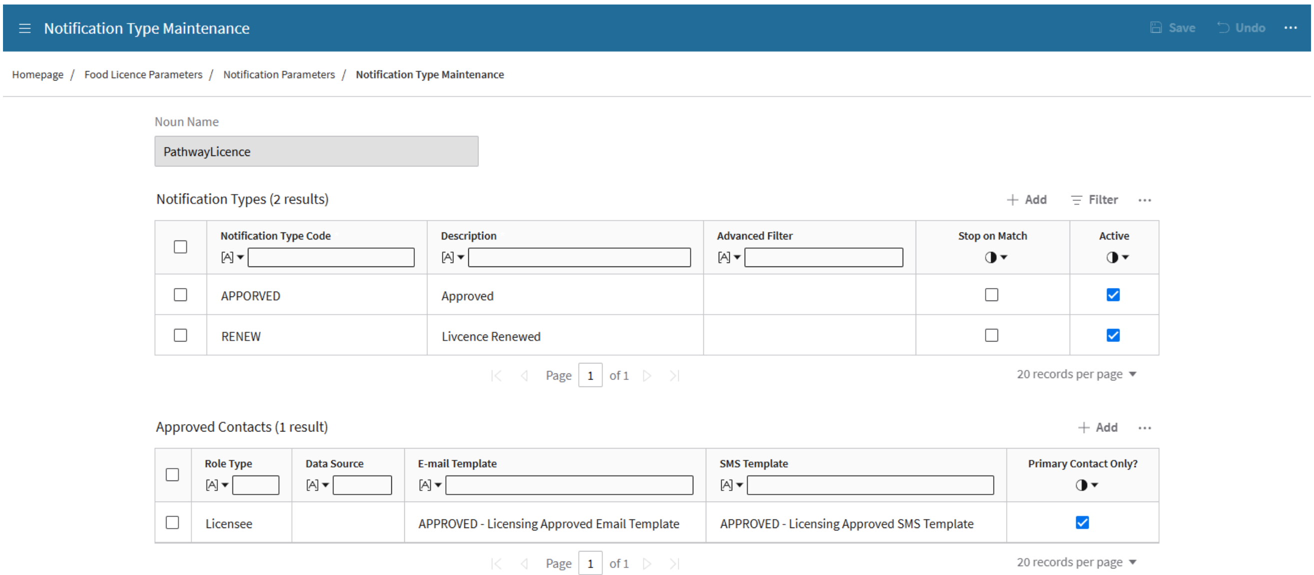


Figure 17

Noun Name
This is the business object to which the data transformer applies.

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

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

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

- Name Role Type – one of the Name and Address Register role types listed within Licensing >> Licensing Parameters >> Name Role. At notification time, if the name role type doesn't apply to the licence type for the relevant licence it is ignored.
- Data Source – a data transformer (see the Data Transformer Maintenance section) with an Output Type value of Contacts that provides contact e-mail addresses from the ION noun for the Publish verb. Either this or Name Role Type will be required, but not both.
- E-mail Template – the e-mail template definition that determines the layout and content of the contact's notification message.
- SMS Template – the SMS template definition that determines the layout and content of the contact's notification message. This field will only appear if the Business Event Notifications SMS Authorised Function is on.

- Primary Contact Only? – if set, indicates that only the first contact in a possible list of contacts for the name role type or data source will be sent the notification message. If the first contact has no e-mail address, the next contact in the list, if any, is sent the message.

Notification Types Filter button

On Notification Types, the Filter button applies to the currently selected notification type allowing filtering criteria to be specified that determines whether the application for which the Publish verb is being processed should trigger a notification.

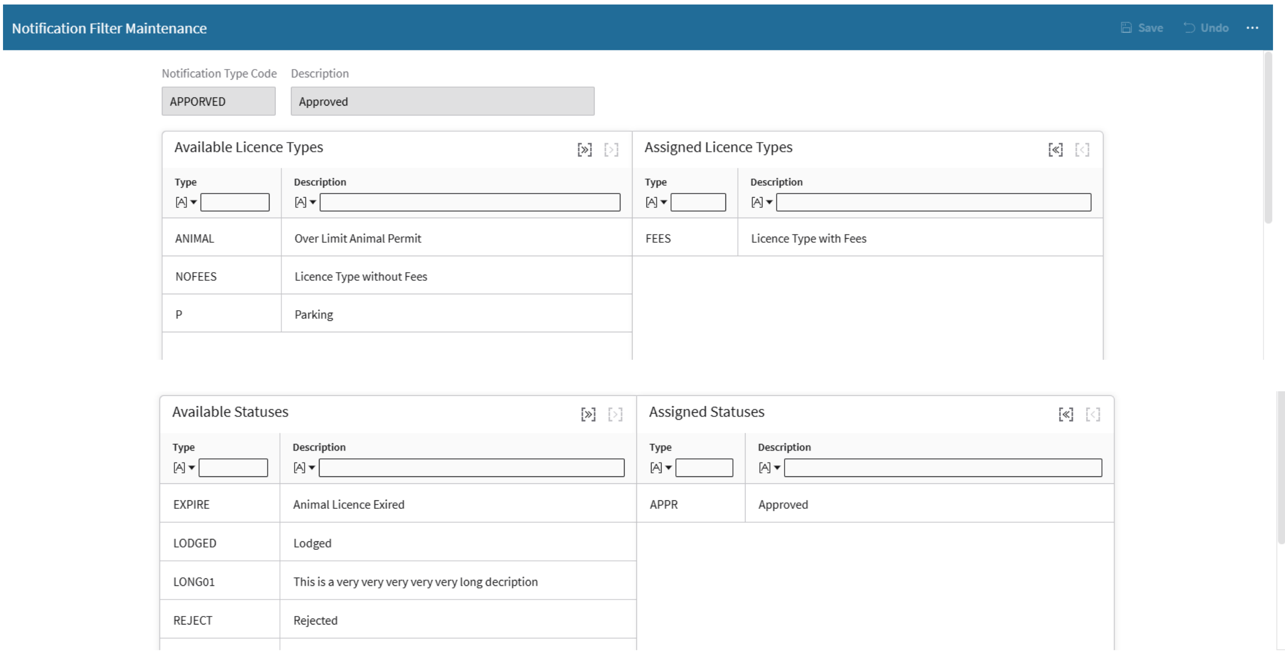


Figure 18

- Licence Types – a swap-list that allows selection of licence types to which the notification message(s) should apply. If no licence types are selected, it is assumed that the notification applies to all types.
- Licence Statuses – a swap-list that allows selection of licence statuses to which the notification message(s) should apply. If no licence statuses are selected, it is assumed that the notification applies to all statuses.

SMS History

All SMS messages sent are available for enquiry in both:

- System Administration >> Integration >> SMS >> SMS History menu option.
- Licensing >> Licensing Maintenance/Enquiry >> License Class >> Licence >> Options >> SMS History.

The SMS History menu option allows access to the log of SMS notifications that have been sent or at least attempted to have been sent. The profile parameters allow a search to be defined that can include a data range, the delivery status of the notification, the originating licence, and the destination mobile number.

Before the SMS History option can be accessed it must be first be assigned to individual licensing classes (Licensing >> Licensing Classes >> Class >> Class Maintenance/Enquiry option) and to a responsibility group within the class's responsibility structure e.g. Licensing >> Licensing Classes >> Class >> Group Maintenance/Enquiry option.

Selecting the SMS History option from a Licence Summary will open an instance of the SMS History search that is pre-filtered to the specific licence.

SMS Message Details shows the following details:

- Date/time the notification was submitted
- Delivery Status
    - Pending - queued; not yet sent to the SMS provider
    - Sent - sent to the SMS provider for delivery
    - Delivered - confirmed to have been delivered by the SMS provider
    - Failed
    - Unknown
- Licence
- Notification Type
- Template
- The notification text.

For notifications that did not successfully send, a Resend button will be displayed to allow the notification to be re-submitted.
NOTE: Re-sending a notification will result in a new history record being created; the existing history record is not updated.

NOTE: This function will be available only to sites who have the required authority. Contact your Account Manager if your site requires this new functionality.

Licensing Maintenance

Case: TOOW CS0491976, MORE CS0506918, DUNE CS0519899	Work Item: 65139
UX Client	ERS:

NAMES MAINTENANCE

Letter - Send button is now available when:

1. The User Account has been assigned Names Maintenance or
2. The User Account has not been assigned Names Maintenance but has been assigned Allow Send Letter when not authorised to Name Mnt.

Licensing Maintenance

Case:	Work Item: 65236
UX Client	ERS:

LICENCE FEES MAINTENANCE

A correction has been made to Licence Fees Maintenance when transferring one or more credits to Debtors. Previously, selecting the Debtors Transaction Generation option did nothing when there were only credits (no invoices) to transfer to Debtors.

Name and Address

Business Event Notifications and SMS Notifications Integration

Case: UX Client	Work Item: 63475 ERS: 108363

NAME MAINTENANCE

***** Authorised Function *****

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

A new Preferred Notification Method field has been added to the NAR record. Maintenance is accessible from Name and Address Register >> Name and Address Maintenance >> Name Search Profile >> Personal / Company Name Summary >> Options >> Personal/Company Name Maintenance.

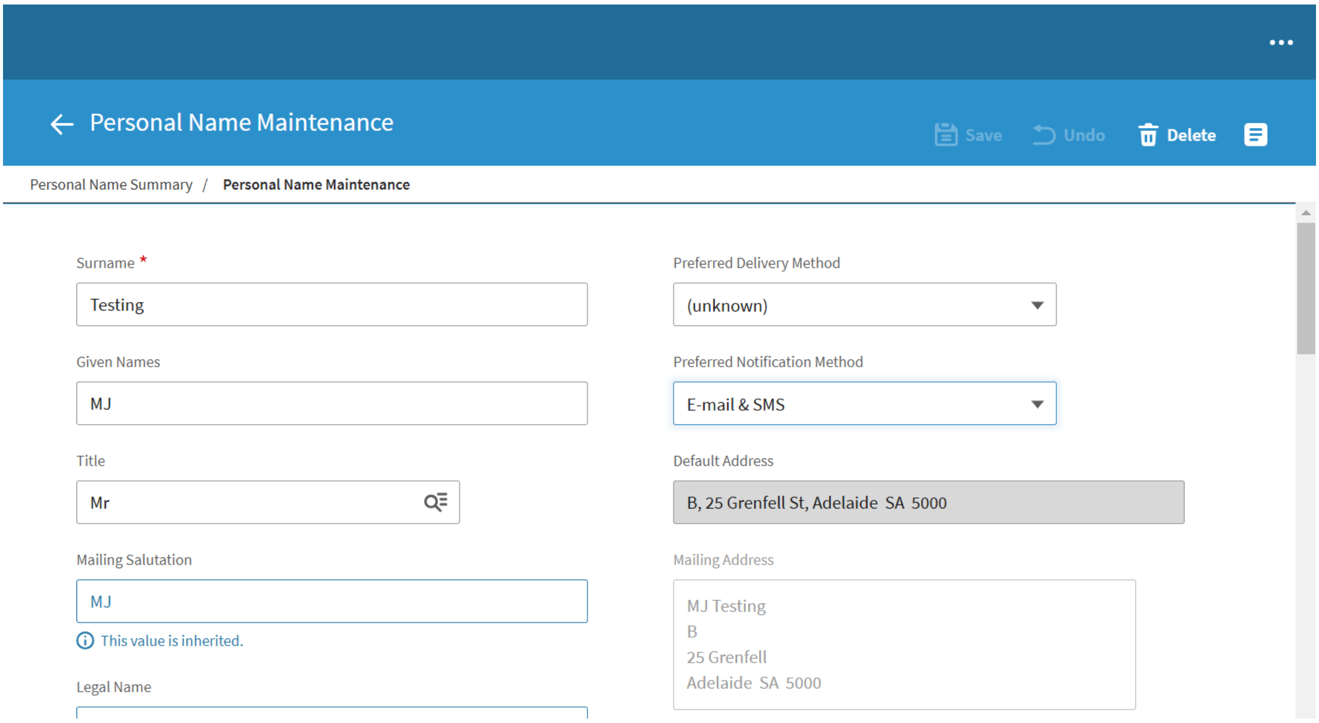


Figure 1

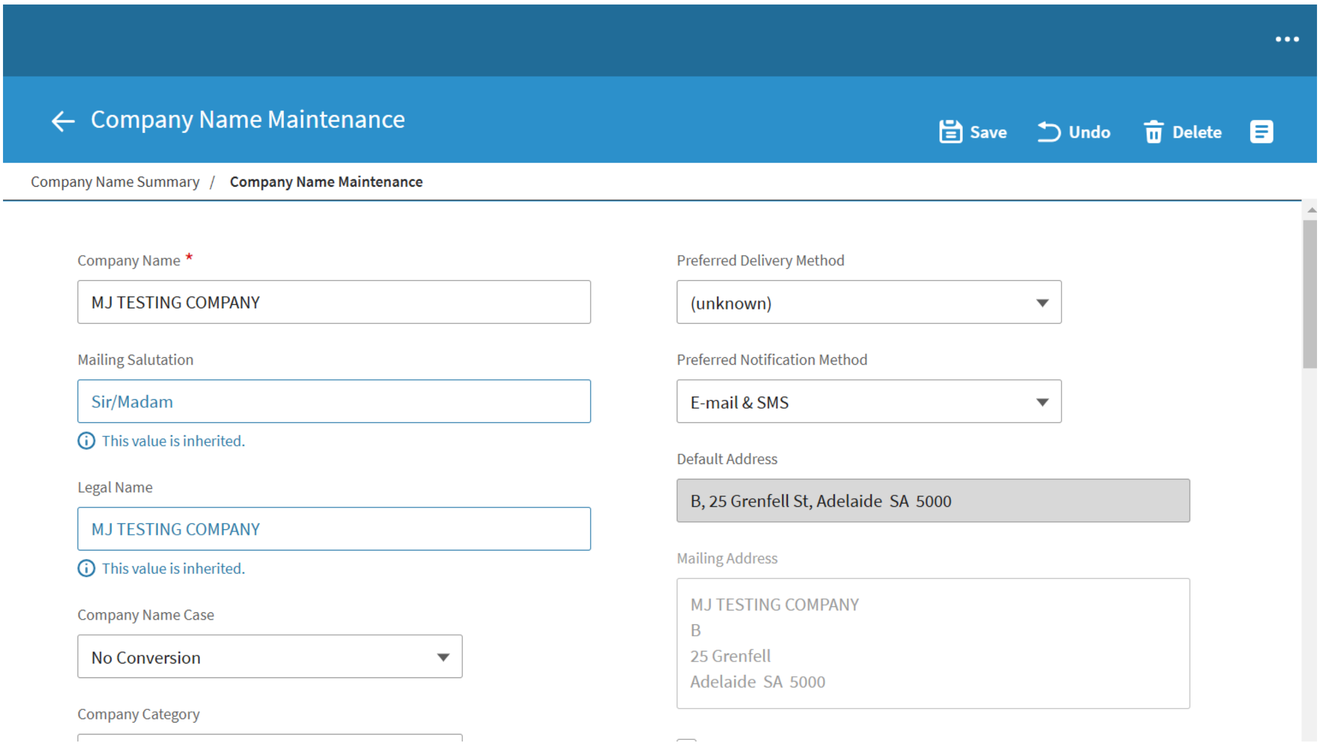


Figure 2

Preferred Notification Method
This field to configure the notification method on any Pathway Name record for Business Event Notification Emails, SMS, or both or opt-out of notifications by setting it to No Notifications.

The Opt-Out setting will only work for Business Event Notification Types Contacts that uses Role Types to provide the email addresses. I.e. The Opt-Out is not supported when a Data Source (XSLT Data Transformer) is used to provide the email addresses.

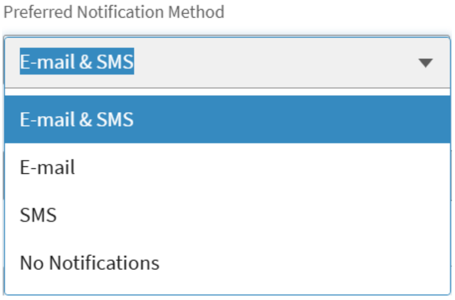


Figure 3

The Preferred Notification Method field is controlled by two authorised functions as follows:

- When the Business Event Notifications Authorised Function is active only, this field will show with E-mail and No Notifications options.
- When the Business Event Notifications SMS Authorised Function is also active, this field will show with the E-mail & SMS, E-mail, SMS and No Notification options.

The default Preferred Notification Method is E-mail & SMS when the Business Event Notifications SMS Authorised Function is active and E-mail when it's not active.

Communication Details (Mobile Phone Number)
The existing Communication Details sequenced grid is used to store the customer's mobile phone number, which will be used to receive SMS notifications.
Always verify the correct mobile number is entered on the Pathway name and the Communication Type is configured to ensure successful SMS notification delivery.

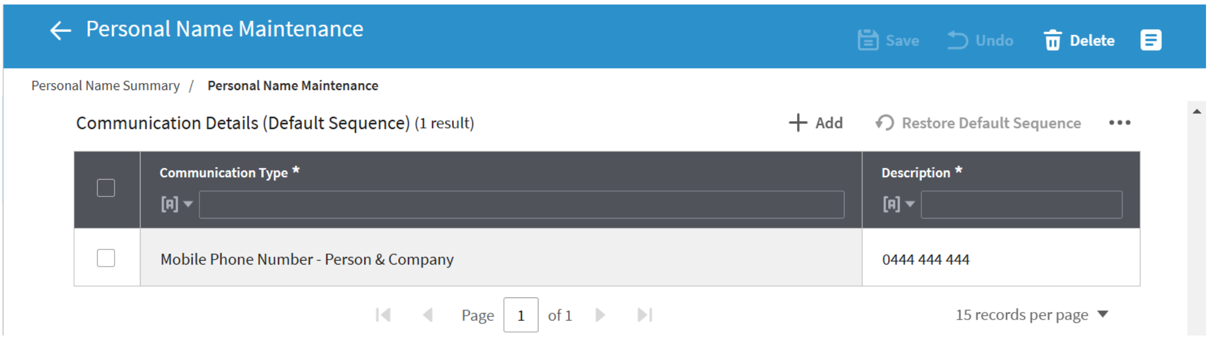


Figure 4

Description
The mobile phone number e.g. 0444 444 444.
NOTE: For details about the accepted formats for SMS telephone numbers please refer to the Telephone Number Format section under System - Functionality.

Communication Type
Ensure the Communication Type is set to the one designated as the Mobile Type Usage for the name's Name Type (either Person or Company).

The Communication Type Usage is accessible in Name and Address Register >> Name and Address Parameters >> Communication Type Parameters >> Options >> Type Usage >> Communication Type Usage Maintenance.

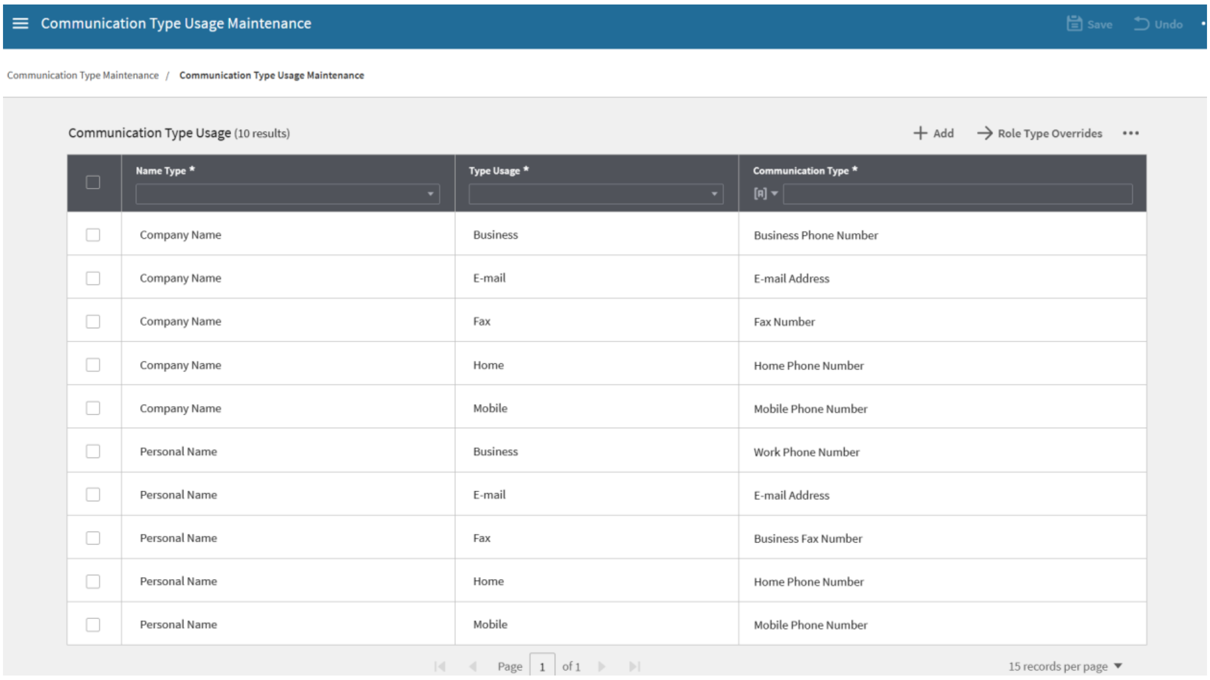


Figure 5

NOTE: This function will be available only to sites who have the required authority. Contact your Account Manager if your site requires this function.

Property Administration

Transfer of Ownership Maintenance

Case: UX Client	Work Item: 57994 ERS:

TRANSFER OF OWNERSHIP

The Transferred On and Transferred By fields will now appear for reversed Transfers.

Search and Bulk Maintenance Enhancements

Case: SYDN CS0348101 UX Client	Work Item: 64749 ERS:

SEARCH AND BULK MAINTENANCE ENHANCEMENTS

The functions that use the Search and Bulk Maintenance Enhancements Authorised Function have been corrected to hide the additional fields when the Authorised Function is not enabled.

Affected menus:

- Property Administration >> Bulk Maintenance >> Bulk Parcel Condition Update
- Property Administration >> Bulk Maintenance >> Bulk Parcel Land Use Update
- Property Administration >> Bulk Maintenance >> Bulk Parcel Plan Update
- Property Administration >> Bulk Maintenance >> Bulk Parcel Zone Update
- Property Administration >> Bulk Maintenance >> Bulk Property Condition Update
- Property Administration >> Bulk Maintenance >> Bulk Property Land Use Update
- Property Administration >> Bulk Maintenance >> Bulk Property Plan Update
- Property Administration >> Bulk Maintenance >> Bulk Property Reference Update
- Property Administration >> Bulk Maintenance >> Bulk Property Zone Update
- Property Administration >> Bulk Maintenance >> Bulk Title Condition Update
- Property Administration >> Bulk Maintenance >> Bulk Ward Update.

Division Maintenance

Case: UX Client	Work Item: 64797 ERS: 91804

DIVISION SEARCH PROFILE

An Auto Expand switch has been added to the Division Search Profile to enable the automatic expansion of the Division Hierarchy Tree to be set as a default. Create a Shared Profile to set Auto Expand on by default for all User Accounts.

Rates Accounting

Assessment Maintenance

Case: MELV CS0364276 UX Client	Work Item: 64649 ERS:

PAYMENT SCHEDULE SUMMARY

Corrections and modifications have been made to the Payment Schedule Summary. Previously, the following occurred:

- Clicking on the Delete Instalments option resulted in an error which prevented the ability to delete Instalment Plans.
- If an Assessment had transactions for multiple installable Generation Runs the Merged Instalments grid was incorrectly only displayed if there were Instalment Plans for those Generation Runs.
- The Transactions related to a row in the Non-Installable Details grid could only be viewed by double clicking on a row. These can now also be viewed using the Transactions option on the grid.
- The Assessment Transactions could be viewed by double clicking on the various Totals controls. This ability has been removed and replaced with the Transactions option.
- If an invalid date (i.e. a date earlier than today) was entered in the Total As At Date a validation error was correctly displayed, but when the date was subsequently changed to a valid date (i.e. today or some future date) the validation error would incorrectly remain displayed.

Rates Generation

Case: UX Client	Work Item: 64651 ERS: 109224

RATES GENERATION CONTROL

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

The Rates Generation and Rates Prediction now cater for allowing Rates Capping to override the Minimum Rate, instead of the Minimum Rate always overriding Rates Capping. This behaviour is controlled using a new Capping overrides Minimum parameter which has been added to the Rates System Parameters, Figure 1.

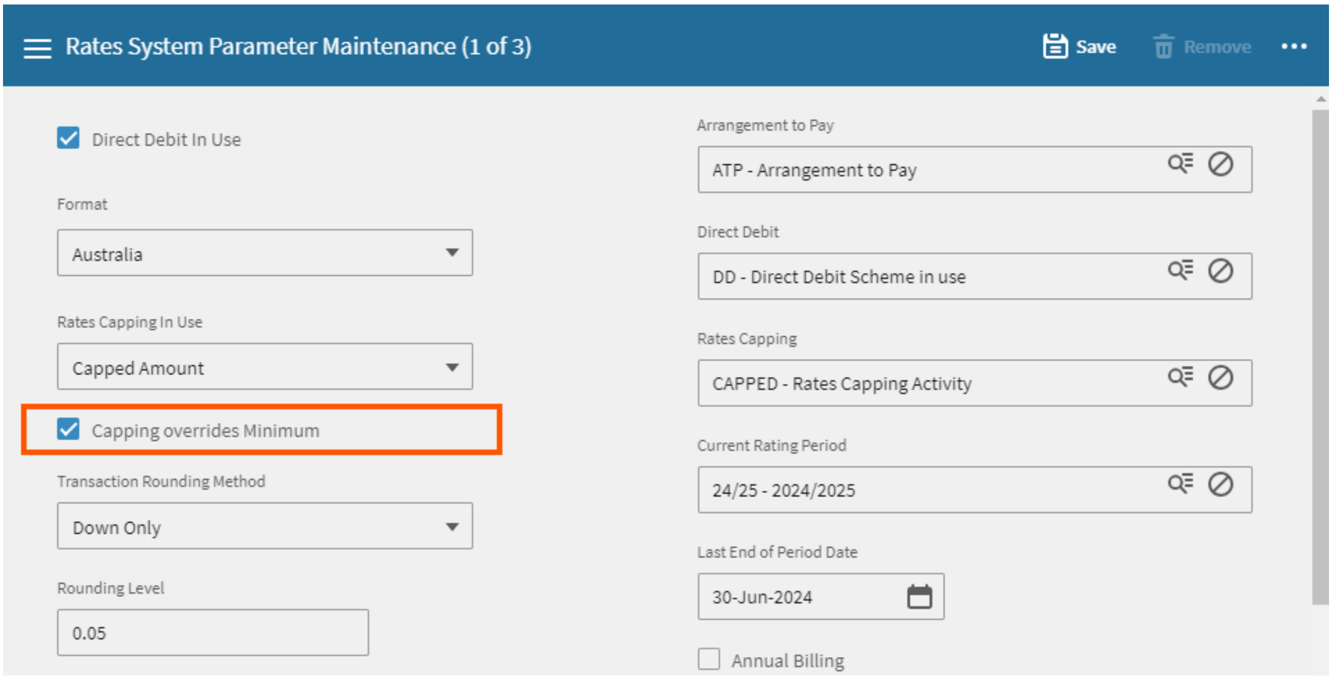


Figure 1

The Capping overrides Minimum parameter will be off by default so that pre-existing functionality is retained (where the Minimum Rate overrides Rates Capping).
If the parameter is turned on Rates Capping will override the Minimum Rate during the calculation of rates.

NOTE: The new parameter cannot be turned on in any of the following situations:
- The Rates Capping in Use parameter is set to None or Rates less Rebate, or
- The Mixed Development Minimum Calculation Method parameter is set to Method 2, or
- The Tiered Rating Method parameter is set to No Base Amount.

The way in which the calculation of rates is affected is illustrated in the following examples.

<u>Example 1: Capping overrides Minimum OFF</u>
For each Assessment Rate Type the Capping is applied first and the Minimum Rate is applied second.

This is equivalent to the pre-existing functionality.

Assessment Number	Capping Amount	Rate Type	Minimum Rate	Initial Calculated Rates	**Rates after Capping**	**Minimum Rate applies?**	**Rates after Minimum**	Final Rates	Transaction Reference
10001	5,500	RES01	6,500	5,000	5,000	Yes	6,500	6,500	-
10002	5,500	RES01	6,500	6,000	5,500	Yes	6,500	6,500	-
10003	5,500	RES01	6,500	7,000	5,500	Yes	6,500	6,500	-
10004	8,450	RES02	7,150	6,500	6,500	Yes	7,150	7,150	-
10005	8,450	RES02	7,150	7,800	7,800	No	7,800	7,800	-
10006	8,450	RES02	7,150	9,100	8,450	No	8,450	8,450	Capped

Figure 2

<u>Example 2: Capping overrides Minimum ON</u>
For each Assessment Rate Type the Minimum Rate is applied first and the Capping is applied second.

Differences for the Final Rates and Transaction Reference between the two Scenarios are in bold, Figure 3.

Assessment Number	Capping Amount	Rate Type	Minimum Rate	Initial Calculated Rates	**Minimum Rate applies?**	**Rates after Minimum**	**Rates after Capping**	Final Rates	Transaction Reference
10001	5,500	RES01	6,500	5,000	Yes	6,500	5,500	**5,500**	**Capped at less than Minimum**
10002	5,500	RES01	6,500	6,000	Yes	6,500	5,500	**5,500**	**Capped at less than Minimum**
10003	5,500	RES01	6,500	7,000	**No**	7,000	5,500	**5,500**	**Capped**
10004	8,450	RES02	7,150	6,500	Yes	7,150	7,150	7,150	-
10005	8,450	RES02	7,150	7,800	No	7,800	7,800	7,800	-
10006	8,450	RES02	7,150	9,100	No	9,100	8,450	8,450	Capped

Figure 3

NOTE: Where the Rates were capped at less than the Minimum Rate, the following applies:

- The Assessment and Rate Type are treated as having had the Minimum Rate applied, even though only part of that Minimum has been applied.
- The Assessment Rate Type is treated as having been capped. This is used to determine whether the Rates Capping Activity is added to an Assessment and is also reflected in the Rate Notice Charge Lines.

When Capping overrides Minimum is ON, then the situation where a given Assessment Rate Type the Minimum was applied prior to being Capped (i.e. Capped at less than Minimum) will be highlighted on in the following places:

- The Amounts Capped Report will print the text M alongside the Calculated Rate, Figure 4:

```
      Form: LRAR7055                      Infor Council Environment                    Page:     2
      User: STAFF01                         Amounts Capped Report                15-Oct-2024 14:34:43
   Reprint: 16-Oct-2024 08:55:43          2024/2025 Rates Generation

Rate Type    Assessment No.    Rate in the Dollar    Rateable Valuation    Calculated Rate      Capped Rate    Amount Capped

RES01             189277 1            0.00100000             5,000,000        6,500.00 M         5,500.00         1,000.00
RES01             189278 9            0.00100000             6,000,000        6,500.00 M         5,500.00         1,000.00
RES01             189279 7            0.00100000             7,000,000        7,000.00           5,500.00         1,500.00
```

Figure 4

- And the Rates Capping History Enquiry will show the new Minimum Capped as checked on, Figure 5.

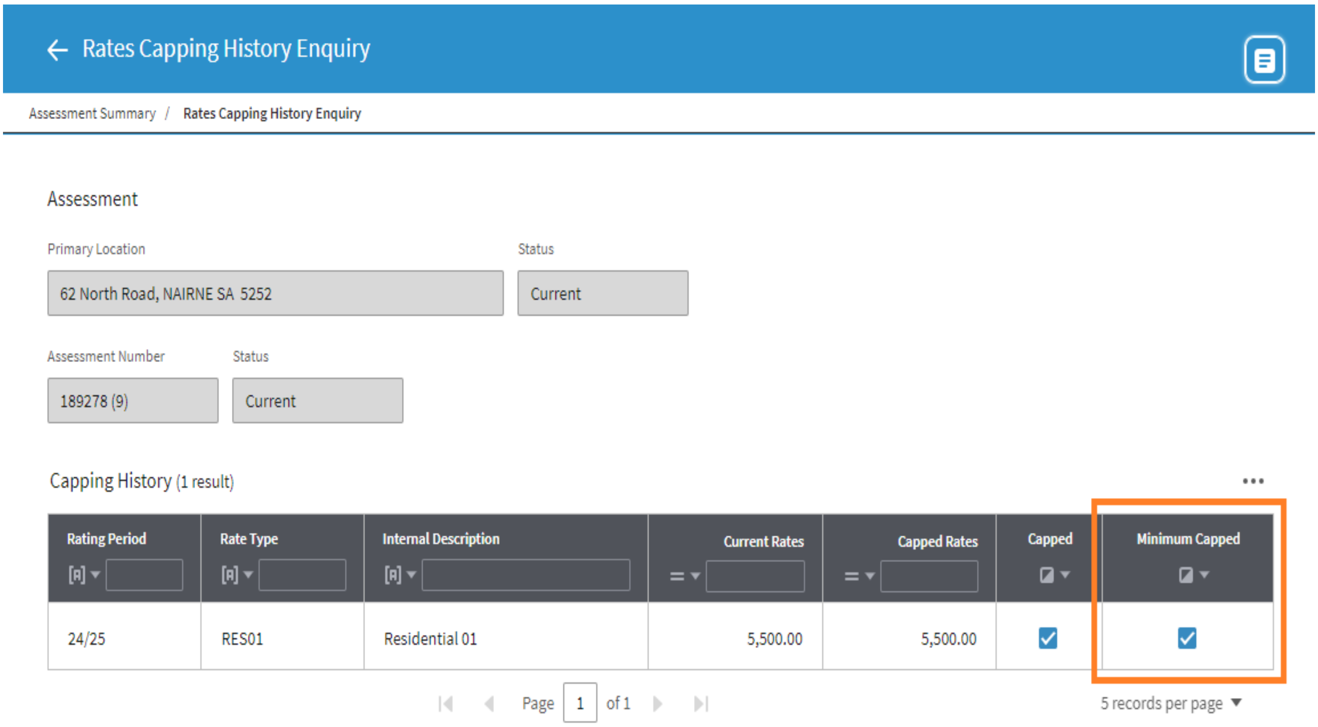


Figure 5

Also, some minor report format corrections have been made to Header details for the following reports produced by the Rates Generation:

- Rates Generation Exception Report
- Rates Generation Summary Report by Rate Type
- Rates Generation Summary Report by Rate Category
- Amounts Capped Report
- Rates Generation Detail Report.

Assessment Maintenance

Case: LATR CS0300086	Work Item: 64664
UX Client	ERS:

RATE TYPE MAINTENANCE

A correction has been made to Rate Type Maintenance. Previously, when adding a Rate Type to an Assessment an error could sometimes occur after selecting the Rate Type from the Look Up.

Assessment Maintenance

Case: RRC CS0351462	Work Item: 64679
UX Client	ERS:

PROFILE

The Assessment Search Profile has been corrected so that a filter of (All) on the application field can be saved and reloaded correctly.

Assessment Maintenance

Case: WODO CS0324282, IPSW CS0407128, MACK CS0446944, RRC CS0455189	Work Item: 64785
UX Client	ERS:

ONLINE FINE GENERATION

A correction has been made to the Online Fine Generation. Previously, if the validation error **Transactions must be calculated for at least one of Current, Current Arrears or Arrears** was displayed then it would always remain displayed and the Calculate option would remain disabled preventing a calculation from being performed. For sites without Fine Calculation Defaults set up in the Rates System Parameters, this meant a calculation could never be performed because the validation error would be displayed on opening.

Rebate Validation and Claims

Case: WILL CS0347645	Work Item: 64793
UX Client	ERS:

REBATE VALIDATION AND CLAIMS

Corrections have been made to the Rebate Validation and Claims in the following situation:
- Rebate Legislation Group of NSW or Victoria,
- Run Mode set to Claim and
- Not all Transaction Types selected.

Previously, the following problems occurred:
- If a given Assessment had a Rebate Reversal transaction within the nominated Posting Date range but did not have a regular (non-reversal) Rebate transaction within that range, the Assessment would not be included in the report even though the Rebate Reversal related to a Rebate whose Transaction Type was selected.
- If a given Assessment had some Rebate transactions for Transaction Types that were selected, and other Rebate transactions for Transaction Types that were not selected, then the Rebate transactions for the Transaction Types that were not selected were reported when they should not have been.

Assessment Maintenance

Case:	Work Item: 64867
UX Client	ERS:

RATEABLE VALUATION ENQUIRY

A correction has been made to Rateable Valuation Enquiry. Previously, the Adjusted Value column was missing for sites that use Postponed Rates.

Receipting

Receipt Entry

Case: HORN CS0044820 UX Client	Work Item: 60787 ERS:

APPLICATION ALLOCATION LINE MAINTENANCE

When Receipting for Applications or Licenses, the logic to check whether the Receipt Line was valid was incorrectly allowing some records to process where a Debtor Accounting Method was in use, resulting in overpayments.
This has been corrected so that the validation checks for Accrual or Cash Accounting Method on the Application Fee, or if there is an outstanding balance to be handled on Application Fees with a Previous Accounting Method. Debtor Accounting Method Fees will only be payable via the Debtor account.

Registers

Register Entry Maintenance

Case: UX Client	Work Item: 62194 ERS:

REGISTER IMAGES

Register images will retrieve the images concurrently instead of in a series to improve the loading performance. Large images will continue to require a longer deration to load.

Registers

Case: MACK CS0211195 UX Client	Work Item: 64442 ERS: 109874

DATE CONTROL

The Date Control within the Registers module has been updated to the standard control within UX, so the functions and behaviours are standard, such as autocompleting dates.

Word Processing

Application Maintenance

Case: UX Client	Work Item: 64935 ERS:

RESPONSE SEARCH AND MAINTENANCE

***** Authorised Function *****

NOTE: Changes to the user interface have been developed for the Pathway UX client only.

Changes have been made to the Application Response Search to enable searching for the ePathway Online Reference Number. The ePathway Online Reference Number is also displayed in Application Response Maintenance.

Also, it is now possible to search for the Respondent.

Additionally, a new Is Private flag is made available on Response Maintenance to indicate whether a Respondent wishes to share their name and address publicly. When the Is Private flag is ON, the Respondent's Name and Address details will be masked by ****** when generating documents against the Response.

NOTE: This function will be available only to sites who have the required authority. Contact your Account Manager if your site requires this function.

Workflow

Workflow

Case: DUNE CS0398128	Work Item: 64739
UX Client	ERS:

Performance improvements have been made to the Workflow Timesheet Search Profile and Summary.