

Lake Mac – Pathway UX Role Based Permissions

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Agenda Overview

Project Overview

What are Role Based Permissions?

Why do you want Role Based Permissions?

What does this mean for Pathway? Lake Mac Implementation

Challenges

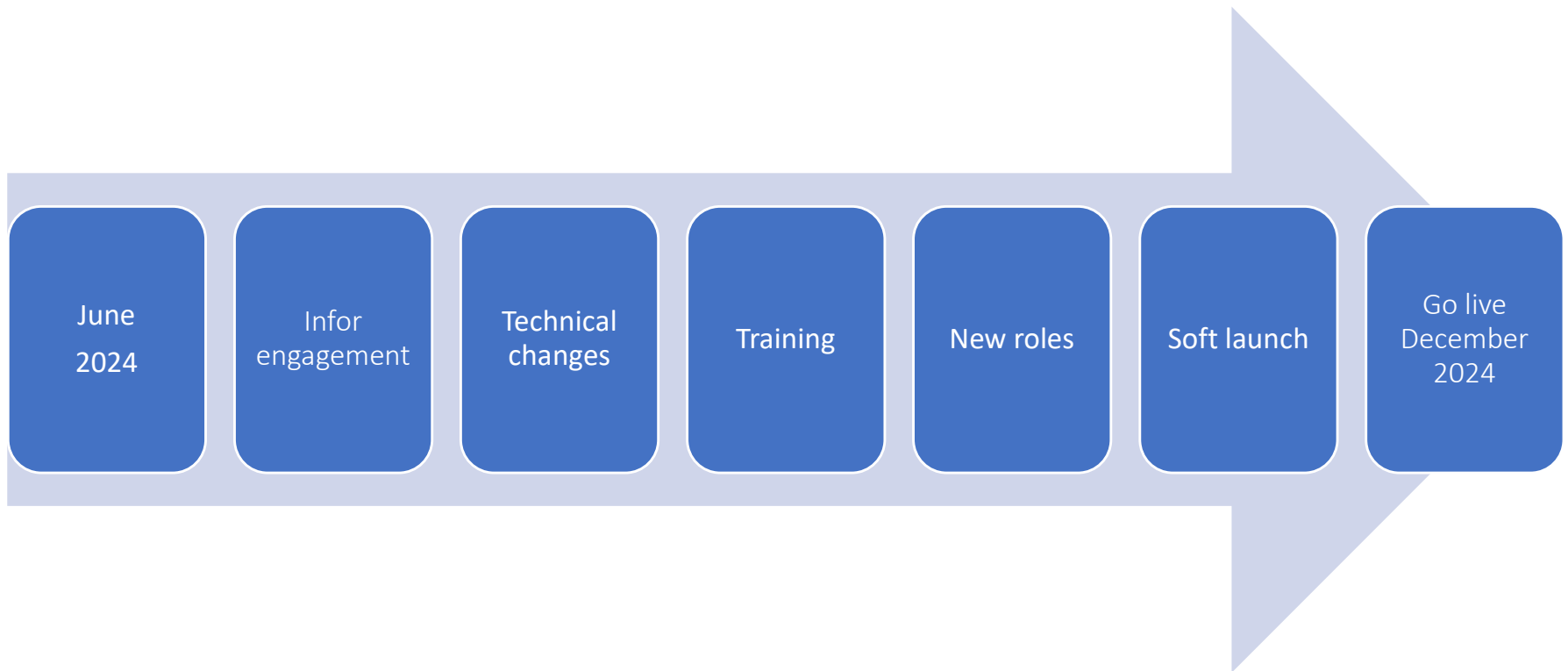
Lessons Learned

Questions





Project Overview



Role-Based Permissions



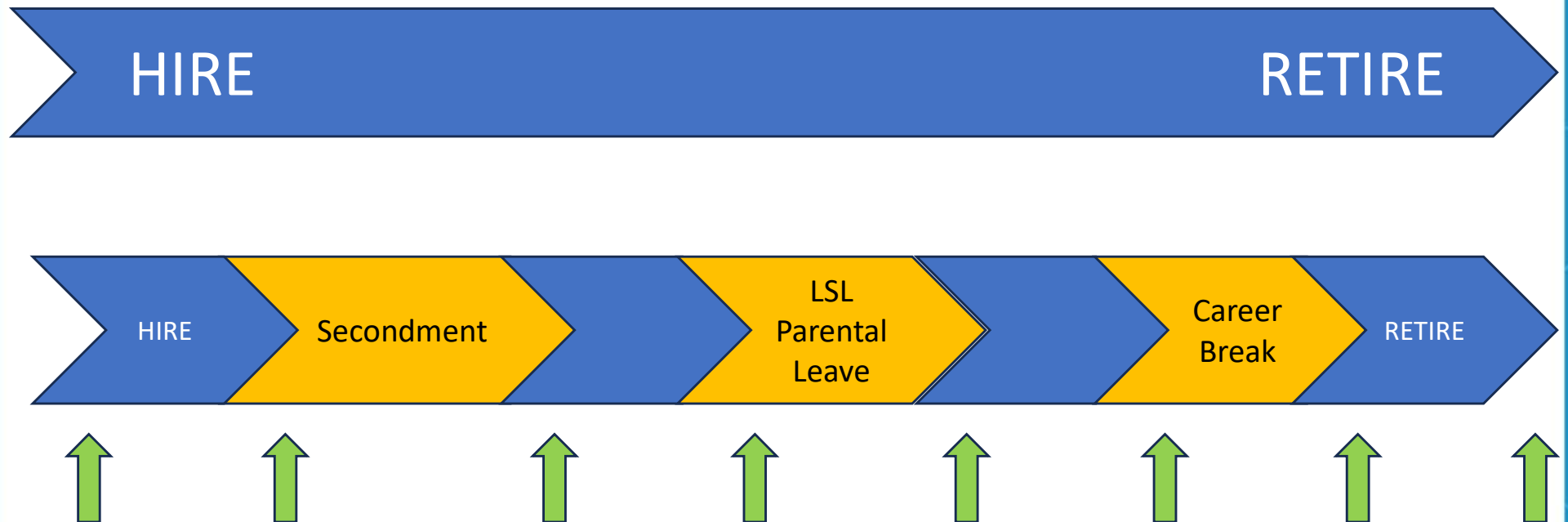
What are Role Based Permissions?

Sometimes called Role-based access control (RBAC)



The idea of assigning permissions to users based on their role within an organization. – AUTH0.com

HRIS Pipeline



EACH ARROW IS A PERMISSIONS CHANGE

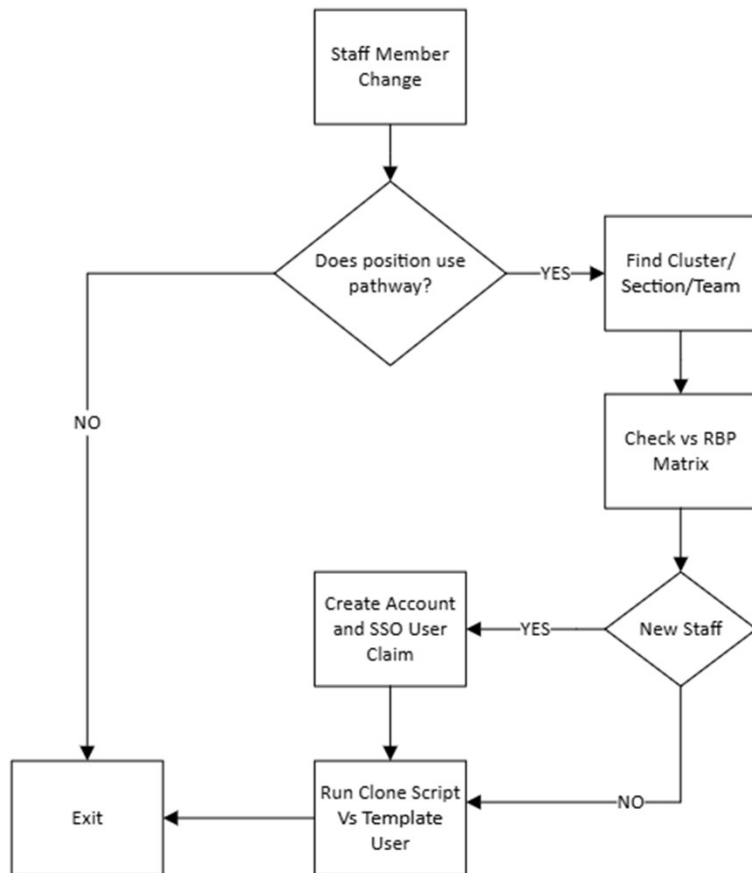
Why do you want Role Based Permissions

With RBAC, access management is easier as long as you adhere strictly to the role requirements.

RBAC helps you:

- Create systematic, repeatable assignment of permissions
 - **Automation**
- Easily audit user privileges and correct identified issues
 - **Cyber NSW - Security**
 - **Yearly Audits - Process**
- Quickly add and change roles
 - **Flexibility**
- Cut down on the potential for error when assigning user permissions
 - **Reliability**
 - **Matrix**
 - **Template/Golden users**
- Future SaaS:
 - Connect Azure using System for Cross-Domain Identity Management (SCIM)

Automation



- Can work with your existing user integrations (Azure/Dell Boomi etc)
- Powershell can do it too!
- Pre-agreed roles automatically assigned when changes occur
- Access can be removed on council exits
- Access can be paused for absences



Audits

SQL Querys on Role Structure

Find the Roles and compare back to expected menu items

Check assigned users hold correct role

Critical Transaction report –Similar to Enhancement 118805

Name	Position	Role	Expected
Nathan Allen	Enterprise System Admin	System Delivered Menu	System Delivered Menu

Listing details for menu group CE - Customer Services Team

The following menu options are available to this user group -

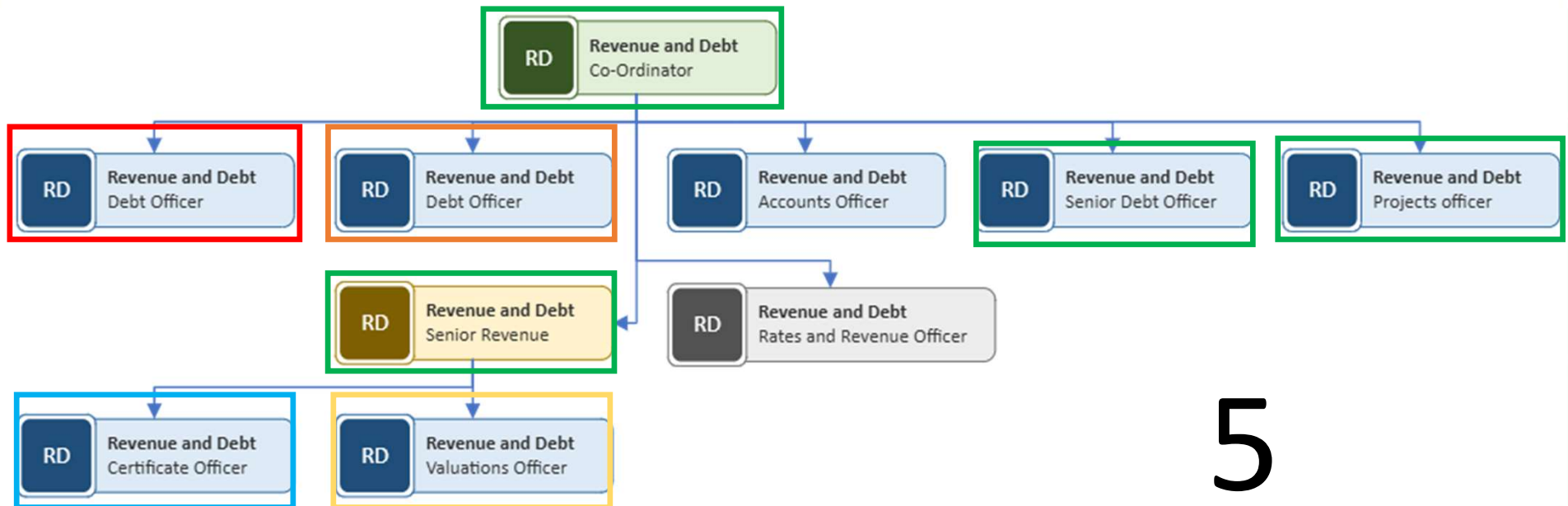
Rates Accounting
Assessment Maintenance
Assessment Enquiry
Batch Processing Functions
Bulk Assessment Maintenance Options
Check Digit Update
Fast Rates Prediction Extract
Fast Rates Prediction
Rates Generation Selection
Ratesable Values Generation Options
Fines Generation Options
Batch Journal Maintenance
Batch Update
Arrangement Re-Calculation
Pending Fines Generation
Housing Notice Extract
Debt Collection Generation Options
Direct Debit Recalculation
Fines Write-Off Generation Options
Bulk Assessment Creation
Direct Debit Extraction

Reports
Rebate Validation and Claims
Aged Period Report
Transaction Entry Audit Report
Rate Notice Report
Instalment/Reminder Notice Report
Transaction Listing
Outstanding Balances Report
Agent's Rates Schedule
Postponed Rates Report
Next Action Date Report
Arrangement Report
Direct Debit Report
Rebate Matching Report

Supplementary Rates
Supplementary Rates Filter
Supplementary Rates Generation Options
Supplementary Rates Audit Report
Supplementary Rates Reason Maintenance
Supplementary Rate Notice Report
Supplementary Rates Approval Report
Supplementary Batch Maintenance
Bulk Supplementary Creation
Journal Entry

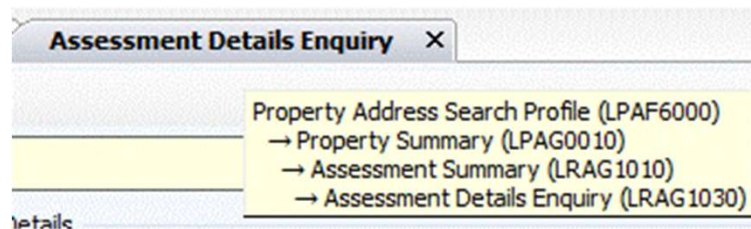
Flexibility

Expect Role growth compared to now (Role Explosion)
BUT each Team/Cluster/Section in Council will be different depending on their purpose



What does this mean for Pathway?

Menu determines option/forms access. Smart Client not so sensitive



In Pathway UX. If the Form isn't in the CURRENTLY ACTIVE MENU
It's a no-go

/ Rates Role Selection / Access Denied

 You have not been granted menu security access to the Rates Assessment Search Profile form from your current role.

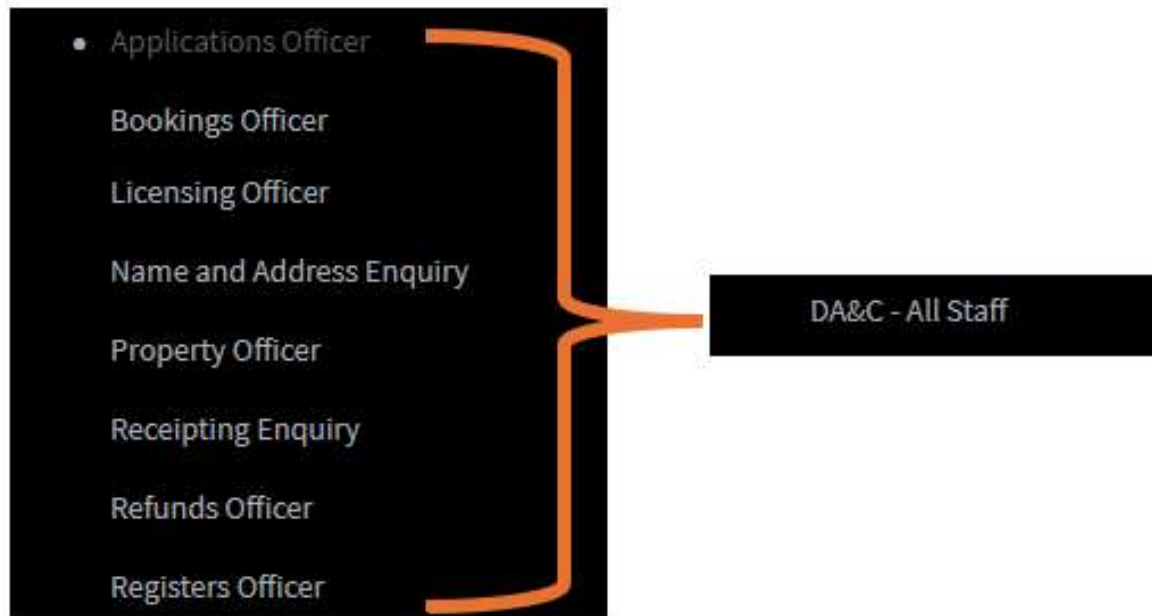
Details

Change to a role that has menu security access to the Rates Assessment Search Profile form (LRAF1010) or contact your system administrator to be granted access.

What does this mean for Pathway?

Since it requires the current active menu for cross module access

You need to merge/reconcile/combine your existing groups



What does this mean for Pathway

Now have roles

You need a matrix to determine what role to grant

Section	Team	Position Examples	Template	User Group Role Cod	Group description	Notes
Development Assessment and Certification	DA&C - Building	Building Surveyor	DAC-ALLSTAFF	DAC-STAFF	DA&C - All Staff	Any position in team DA&C - Building
	DA&C - Business Specialist	Project and Content Officer	DAC-PROADM	DAC-PROADM	DA&C - Process Administrator	Team = DA&C - Business Specialist AND Position = Project and Content Officer
		Business Specialist Lead	DAC-BSPEC2	DAC-BSPEC2	DA&C - Business Specialist Level 2	Team = DA&C - Business Specialist AND Position = (Business Specialist Lead or Project OR Development Contributions Officer)
		Development Planner Flora and Fauna	DAC-BUSSPE	DAC-BUSSPE	DA&C - Business Specialist	Anyone in team DA&C - Business Specialist where Position <> (Business Specialist Lead OR Project and Development Contributions Officer OR Project and Content Officer)
		Development Administration Officer	DAC-CNTADM	DAC-CNTADM	DA&C - Centralised Administration	Anyone in team = DA&C - Centralised Administration
	DA&C - Development	Development Planner	DAC-ALLSTAFF	DAC-STAFF	DA&C - All Staff	Any position in team DA&C - Development
	DA&C - Development Engineering	Development Engineering	DAC-ALLSTAFF	DAC-STAFF	DA&C - All Staff	Any position in team DA&C - Development Engineering

What does this mean for Pathway

Now you know what role to grant

Copy from a template user!

```
exec [dbo].[spCloneUser] 'DAC-ALLSTAFF', 'NEWUSER'
```



User Details

User Identifier *

DAC-ALLSTAFF

E-mail Address

☐ Active

User Name *

Template User - DA&C All Staff

User Signature File

Type to Search

User Groups

Available			Assigned			
Abbreviation	Description	Active	Abbreviation	Description	Active	Default
[R] ▾	[R] ▾	☑ ▾	[R] ▾	[R] ▾	☑ ▾	☑ ▾
ACT-CLTEXP	ACT - Cultural Experiences Staff	☑	DAC-STAFF	DA&C - All Staff	☑	☑
ACT-CLTDR	ACT - Cultural Experiences Leader (Act)	☑				

Challenges



- What do the roles look like?
- Staff Movements
- Legacy Role Consistency (Manager vs Document Super User)
- Log-in data
- SME availability

Technical



- Lots of Menu Options
- Trying to get best fit
- Permissions to be Least Privilege

Complexity



- Permissions will need reviews
- Responsibilities are another matter

Re-work



Lessons Learned

- Naming conventions
 - Match them to Org structure
- Clean up dated accounts 1st!
- Some things will come as a surprise at go live
 - Lots of analysis
 - Highlighting prevalence of access in each team
 - Excel is your friend!
 - Suggest the changes
 - "Unless there is a reason this will be removed"
 - If it's not in, it's out (John McEnroe)

FS - Revenue & Debt Management	Certificate Officer	Applications Enquiry	Bookings Officer
FS - Financial Systems & Solutions	Senior Financial Systems Specialist	Applications Officer	Bookings Officer
FS - Procurement Services	Accounts Payable System Support O	Bookings Officer	Debtor Enquiry
FS - Revenue & Debt Management	Senior Revenue Officer	Applications Enquiry	Bookings Officer
Financial Services	Business Assistant to the Chief Finar	Applications Officer	Bookings Officer
FS - Procurement Services	Accounts Payable Business Partner	Bookings Officer	Debtor Enquiry
FS - Revenue & Debt Management	Valuations Officer	Applications Enquiry	Bookings Enquiry
FS - Financial Operations	Asset Accountant	Applications Enquiry	Bookings Officer

Lessons Learned

- Some groups will have very similar permissions
- Write good notes
- Maintain existing node/leaf structure for the Transaction Processor (CMNF1080)
- No way to move changes from Dev to Prod. Manual creation of Menus

		DA&C - Building (DA&C- ALL Staff)	
Applications Enquiry Applications Officer	4 60	Every staff member has Application officer at least. Applications officer	Copied Applications (LAP), Workflow (CWF) and Refunds (REFUNDS) nodes .Edited Refund Transaction enquiry (CFIH3500 to CFIF3500_E) . Create new Receipting node (CRF) ==> Moved Receipt Enquiry CRCF6000 . Create Name and Address Register (CNA) node ==> Moved One View - Customer Payment Enquiry CNAH6010 to NAR node . Left Customer Profile Maintenance (requires System Admin node). Renamed ' Report ' LMCC Reports'
Applications Super User	2		

What does it look like in Pathway UX

Search

My Account

Bookmarks

My Roles

CE - Customer Services Team

Applications

Bookings Management

Customer Profile Maintenance

Debtors

Inspections

Licensing

Name and Address Register

Property Administration

Rates Accounting

Receipting

infor

Home

Message Board (1 result)

Refresh

...

Precis	Detail	Urgent
Pathway UX upgrade completed to 2025.03	Completed 19 August 2025. If you identify an issue, please lodge a ticket with the IT Helpdesk and the Enterprise Systems team will investigate.	☒

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100 records per page

AM Infrastructure - Referrals per Officer

James Baker

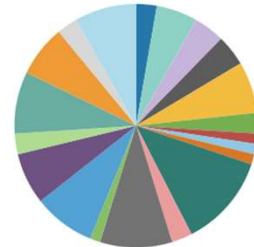
Nathan Allen

Paige Johnson

Phillip Townsend

0.0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1.0

Overdue Notice/Order Tasks



Overdue Initial Contact Tasks

Callum Jamieson - 21 (14%)

Daniel Beck - 1 (1%)

Jock Graham - 1 (1%)

Lisa A Hure - 45 (30%)

Michael Mannile - 35 (23%)

Paul McIntyre - 1 (1%)



Benefits of creating new roles



- Pathway UX security tighter - new roles consolidate access to various modules
- Easy access for staff with one menu list
- Bookmarks accessible via role selected
- NSW Audit office action to move to role-based profiles
- Create template roles to clone new staff or clone access for staff secondments
- Ease administrative burden

Questions



An aerial photograph of a boat moving across the water, leaving a white wake. The water is a deep teal color. The boat is small and appears to be a motorboat with a few people on board. The wake is a bright white line that curves slightly to the right.

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